



The Gantry manual

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Describes Gantry 1.15.0

gantry.app/docs

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The Gantry manual

What Gantry is, three ways to start, a five-minute tour of the app, where each role begins, and how to get help.

Gantry is a construction scheduler for small teams. You build a project's schedule in a spreadsheet-style [grid](#) beside a [Gantt chart](#), link the tasks, and Gantry works out the dates. From the same project your crews get their plan on a phone, your office gets [reports](#), and your owner gets [a PDF](#), [an Excel file](#) or [an MS Project file](#).

This manual has three kinds of page. *Getting started* is where you are now. *Workflows* walk you through one piece of work from start to finish. *Features* explain one part of the app in full. The [glossary](#) defines the words, and every column in the grid.

Three ways in

- *Try the demo.* The [demo](#) runs the whole editor in your browser with a sample project. It resets every time the page loads, file exports ask you to start a trial, and adding, pasting or importing tasks stops once a project has 60. It has no company account, so the pages that need one are missing: [Home](#), [People](#), [Roster & equipment](#), [Company](#), [Draft and Publish](#), the [master plan](#), the [Day plan](#), [crew and itinerary links](#) with their [printed sheets](#), [project templates](#), [calendar standards](#) and [company columns](#).
 - *Start a trial.* The [pricing page](#) takes you through checkout and sets up your company with a 14-day trial. Your invitation as its admin arrives by email.
 - *Sign in to your company's account.* Your company lives at [app.gantry.app](#). If someone sent you an invitation, [Your account](#) walks you through your first sign-in.
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A five-minute tour

Home

When you sign in from the office you land on Home: your projects in one table, favorites first, then the ones you opened most recently, then the rest. **+ New project** sits at the top. The **Inbox** on the right holds your notifications and the cheat sheet. Field accounts land on **My tasks** instead (see [Work](#), [My tasks](#) and [Calendar](#)), and partner staff who belong to no company land on their [partner dashboard](#).

The sidebar

The  button at the left of the top row shows or hides the [sidebar](#), the app's map. It lists only the places your account can open, under four headings:

Heading	Pages
Planning	Home, My tasks, Projects , Master plan, Calendar
Resources	Roster & equipment , Crew planning , People : set up the list, plan the counts, book the names
Insights	Reports
Administration	Company

Under them, **Recent** lists the five projects you opened last, then **All projects**.

The editor

Open a project and you are in the editor: the grid on the left, the Gantt chart on the right. It has two rows at the top.

- *The top row* names the project (click the name for its settings) and carries its tabs: **Schedule**, **Work**, **Dashboard** (see [the project Dashboard](#)) and **Crew planning**. On the right are the [save chip](#), the bell, the ? button and your avatar.
- *The bottom row* starts with four menus, **File ▼**, **Export ▼**, **Tools ▼** and **Format ▼**, then the buttons you use all day: undo, insert and delete a task, indent, link, zoom, **Critical**, **Baseline**, **Crew** and **Views**.

[The editor's toolbar](#) lists every button and menu item.

Find your role

Start from the work you do; each tile lists the pages for it. [Who can see and do what](#) explains the roles — Admin, Editor and Field — and partner staff.

 I plan schedules Build the schedule, keep it current and publish it.	
Create a project and build its schedule	>
Bring in a schedule from MS Project, P6 or Excel	>
Update progress and the data date	>
Publish the plan crews see	>
Plan crews and equipment for the weeks ahead	>
Every page in the manual →	

I run crews in the field

The day's work on paper or on a phone.

Run the day from the handout or the Day plan >

Report progress from a phone or tablet >

Print the 3-week lookahead and other paper >

The Day plan >

Crew links and itineraries >

[Every page in the manual](#) →

I run the company

People, licenses, standards and your other tools.

Set up your company >

Invite people, set roles and manage licenses >

Run a training course >

Connect other tools with webhooks and the API >

Licenses and billing >

[Every page in the manual](#) →

I'm a partner

Your clients' companies, looked after.

Look after your clients' companies >

The partner program >

Who can see and do what >

Licenses and billing >

[Every page in the manual](#) →

Finding help

- *The ? button.* The ? at the right of the top row opens **Help & support**. The same dialog opens from **Tools ▾ → Help & support...**, from **Help & support...** in your avatar menu, and from **Help & support** at the foot of the sidebar.
- *Call or email us.* The dialog gives our support line, [888-508-5777](tel:888-508-5777), and our address, support@gantry.app. We reply within one business day.
- *Send a message.* Under **Send us a message**, pick a **Topic (Support, Feature request or Question)**, type your message and press **Send message**. If the message can't go through the app, Gantry opens a draft in your own email program instead. You can also write to us from the [contact page](#).
- *Keyboard shortcuts.* **Keyboard shortcuts...** (in the help dialog, the avatar menu and **Tools ▾**) lists every shortcut. At its foot, **Print...** opens the two-page cheat sheet, ready for the trailer wall, and **In the manual** opens the [shortcuts page](#) in a new tab; it has the same list.
- *The cheat sheet.* Home's **Inbox** keeps the cheat sheet at the bottom, with **Open on gantry.app**, **Full manual** and  **Print / PDF**. It is also on the [cheat sheet page](#).
- *Find in a project.* Ctrl+F searches the open project's task names, notes, quantities, Activity IDs and your own columns. Jumping to a match opens any phase that was folded away.
- *The column guide.* **Column guide...** in the help dialog explains every column in the grid. **Column glossary in the manual**, at the guide's foot, opens the [glossary](#) in a new tab; it has the same entries.
- *This manual.* **Manual...**, after **Column guide...** in the help dialog, opens this manual in a new tab and leaves the dialog open. The printed cheat sheet gives its address, gantry.app/docs, at the top of its first page.

Everything in this manual

Getting started

Who can see and do what

The three roles, Admin, Editor and Field, what each can see and change, who can publish, partner staff, crews with only a link, and who needs a license.

Your account: sign in, profile and password

Your first sign-in from an invitation, what you see first, your photo, name and email, how long you stay signed in, and what to do about a forgotten password.

Workflows

PLAN AND SCHEDULE 9

Create a project and build its schedule

Start a new project from a template or a blank page, add tasks, durations and links, and watch the Gantt chart and the critical path build.

Bring in a schedule from MS Project, P6 or Excel

Bring a schedule into Gantry from Microsoft Project, Primavera P6 or a spreadsheet, and update a project in place when a newer file arrives.

Publish the plan crews see

Put a project into Draft so crews keep a checked plan while you work, then publish it to them, alone or several projects at once from the master plan.

Update progress and the data date

Save a baseline, then at each update set the data date, record actual dates and percent complete, log weather days, and read planned against reported progress.

Check the schedule before you submit it

Run the schedule quality checks, work through each failing check, re-run until the score is where you want it, then send the report with your submittal.

Print the 3-week lookahead and other paper

Filter the schedule to the next three weeks, print it as a one-page lookahead, save the view and the print settings, and export to Excel, CSV or MS Project.

Find and restore an earlier version

Save a version of a project by name, find it or an automatic save in History, look at it, compare it with today's plan and restore it, and copy, archive or bring back whole projects.

Write the monthly schedule update

Produce the monthly schedule update narrative from the changes since the last update, edit it, and send it as a PDF or as the body of an email.

Report on progress, crews and equipment

Pick the report that answers your question, choose its projects and weeks, drill into the numbers, and print or export them, from one project up to fifteen.

CREWS AND EQUIPMENT 3

Plan crews and equipment for the weeks ahead

Put crew and equipment on your tasks, mark what you still need, name the people and machines, and read the weeks ahead trade by trade on Crew planning.

Send crews their links and itineraries

Make a crew link for a project or an itinerary link for one person, check what the crew will see, send it, and turn it off when it is no longer needed.

Book people day by day

Book people onto tasks a day at a time, book a saved crew in one move, keep a foreman on a project between tasks, clear double bookings and publish.

IN THE FIELD 2

Run the day from the handout or the Day plan

Start each day from the Day plan on a tablet or phone, or from the printed crew handout, and print your own week or the master sheet.

Report progress from a phone or tablet

From a phone or tablet, find your tasks in My tasks, then record status, percent complete, remaining days, checklist ticks and links from the site.

RUN YOUR COMPANY 4

Set up your company

A new company admin's first hour, in order: groups, the logo and default colors, calendar standards, project types and templates, and company columns.

Invite people, set roles and manage licenses

Invite people, set their roles and groups, grant master planning, help with passwords, correct names and emails, disable or remove accounts, and buy licenses.

Run a training course

Turn training on, build a course from a template project, give each student a copy, follow their work and check it against an answer key, then reset, archive or delete it.

Connect other tools with webhooks and the API

For your company's developer, set up the webhook that tells another system when a project changes, check each delivery's signature, and make read-only API tokens.

PARTNERS 1

Look after your clients' companies

For partner staff, create client companies, start trials, add and cancel licenses, follow invoices, and step into each client's Company page to run it.

Features

YOUR COMPANY 11

Companies, groups and roles

How a company, its groups and each person's role decide which projects everyone sees, edits and can delete.

The Company page

The Company page, where a company admin runs the company, one section at a time, from users and standards to billing and training.

Company calendar standards

Calendar standards are the company's own work calendars, which new projects copy and existing projects can adopt.

Project types and templates

Project templates capture a finished project's structure so new projects start from it, and project types sort the templates.

The Roster & equipment page

The Roster & equipment page is the company's roster of people and fleet of machines, with its saved crews and the trade and machine type catalogs behind them.

Integrations: webhooks and the read-only API

For your developer, Gantry's outbound webhook and read-only API tokens, with events, envelope, signature, endpoints, limits and how to keep them secure.

Licenses and billing

Who uses a license, how a company buys and manages licenses through Stripe, trials, a late payment, and what happens after a cancellation.

The partner program

The partner program lets a reseller run client companies on Gantry, with partner staff, a partner dashboard and monthly invoiced billing.

Invitations and password resets

How a company admin invites people with a link instead of a password, and how invite and reset links, forgotten passwords and admin resets work.

Security and sign-in

What protects your account and your company in Gantry, from wrong-password lockouts and sign-in lifetimes to the activity feed and disabling a user.

Training

Training runs instructor-led courses, where each student practices in their own copy of a template project and the trainer follows every copy.

PROJECTS AND THE EDITOR 9

Home

Home is your starting page — your projects grouped by favorites and recent use, your notifications, and the cheat sheet.

Getting around: the sidebar, pages and page addresses

How Gantry's frame fits together — the top row, the sidebar, Go to, page heads, the Back button, page addresses you can share, and presenting to a room.

The editor's toolbar

The editor's two toolbar rows — the project's name and chips on top, the File, Export, Tools and Format menus and the everyday buttons below.

Creating a project

Start a project blank or from your company's project templates, set its details before anything is saved, or copy one you already have.

On phones and tablets

What changes when you open Gantry on a phone or a tablet, and which work each size of screen suits.

Accessibility

What Gantry's frame and its two grids guarantee for keyboard and screen-reader users, how each promise is checked, and what no test covers.

Editing in the grid

How the editor's grid works — selecting and editing cells, moving and indenting rows, header and blank rows, columns, and what undo covers.

Company columns

Columns your company defines once — a name, a type and its choices — that planners add to any project, and that crews see in the field.

Copy, paste and fill

Copy and paste tasks with their links, paste a block from Excel, paste it as new tasks, and fill a series down with the fill handle.

SCHEDULING 9

Scheduling: durations, links, dates and float

How Ganttry works out your dates — durations, links and lag, constraints and deadlines, work calendars, float and the critical path.

Baselines and variance

Save up to five named baselines, choose the active one, and see how far each task has slipped against it in the grid, on the Gantt and in exports.

Cost loading and cash flow

Put a budget on each task with the Cost column, and Ganttry spreads it over the work to draw your planned, earned and baseline cash-flow curves.

Colors and text

Style rows with bold, italic, underline, strikethrough, text color and size, and tint tasks with named color tags that carry into the Gantt, PDFs and Excel.

The Gantt chart

The Gantt chart beside the grid — dragging bars, zooming, reading the tooltip, splitting a task, work patterns, the crew histogram and baseline bars.

Filters, saved views and the 3-week lookahead

Narrow the grid and Gantt to the work you care about — the one-click 3-week lookahead, combined filters, and saved views — and print or export just that.

Saving, history and opening projects

Ganttry saves as you work, keeps named versions and automatic saves you can look at, compare and restore, holds every project in one library, and never overwrites a teammate's save silently.

Print and export

Print the schedule as a PDF on the paper size you need with saved settings, and export it to Excel, CSV or MS Project XML — and what each format keeps.

Importing a project

Bring in a schedule from MS Project XML, Primavera P6 XER, Excel or CSV — and update a project in place when the next month's file arrives.

CREWS, EQUIPMENT AND REPORTS 7

Crew planning and the crew you still need

The Crew planning page lays out one project's crew and equipment demand day by day or week by week, and shows the crew you still need to find.

Equipment on tasks

A task can carry the machine types it needs, with a quantity, the specific machines and people assigned to fill them, and the tools its crew should bring.

People

People books your company's roster day by day across every project, and shows who works where, which tasks are still short, and who is free.

Reports

The Reports page gathers every report in one library, across projects or for one project, and says which plan of each project it reads.

Crew and equipment reports

Three reports read crew and equipment across your projects, what the plans call for, who and what is booked where, and the three-week sheet for the site.

Shared coverage

A coverage set joins tasks in one project that share the same crew or machines, so the people and machines they share are counted once.

The project Dashboard

The Dashboard is a one-page readout of one project's progress and schedule checks, computed live from the schedule.

PLANS AND PUBLISHING 6

Draft and Publish: the plan crews see

Put a project into Draft to keep editing while crews keep seeing the plan you last published, then publish when it is ready.

The master plan

The master plan lays several projects on one date axis, so you can plan them together, see who is double-booked, and publish them to crews at once.

Progress tracking and the Projects page

Record progress with a data date and actuals, then compare planned and reported progress across every project on the Projects page.

The schedule update narrative

The schedule update narrative drafts the written part of a monthly update, from what changed since the previous progress update.

Contract days and weather days

The contract-day ledger counts the working days charged against a contract, records weather and other excepted days, and forecasts where the project will land.

Schedule quality checks

Schedule quality checks run 16 checks adapted from the DCMA 14-point assessment and give the schedule a score before you submit it.

IN THE FIELD 4

Work, My tasks and Calendar

Work, My tasks and Calendar are where crews run the plan, on a phone, a tablet or a desktop, and report progress without touching the schedule.

Crew links and itineraries

A crew link shows a project's day plan on a phone without signing in, and an itinerary link shows one person's plan across every project they are on.

The Day plan

The Day plan shows your own work day by day across every project you are on, the same view a crew link gives, for anyone signed in.

Crew paper: the handout, the itinerary and the master sheet

Crew paper is the printed backup for the field, the crew handout, the itinerary, My week and the master week and day sheets.

Reference

Glossary

Plain definitions of Gantry's terms, then of every column in the grid.

Keyboard shortcuts

The keyboard shortcuts the app lists, then the keys each page shows along its foot.

Questions and answers

Short answers to the questions people ask most about Gantry, each with a link to the page that explains more.

Who can see and do what

The three roles, Admin, Editor and Field, what each can see and change, who can publish, partner staff, crews with only a link, and who needs a license.

Gantry accounts work inside a [company](#), and a company can be split into [groups](#), such as regions or divisions. Every project belongs to exactly one company or one group. What you can see and change depends on your role where the project lives. [Companies, groups and roles](#) explains companies and groups in full.

The three roles

A role belongs to one membership: you can be an Admin of one group and an Editor in another.

Role	Where	What you see and change
Editor	a group	That group's projects. You create, edit and archive them, but you can't delete them.
Editor	the company	The company's own projects, but not the ones that live in its groups. You create, edit and archive them, but you can't delete them.
Admin	a group	That group's projects, including deleting them.
Admin	the company	Every project in the company and in each of its groups, and you can delete any of them. You also run the company: its groups, its users, who belongs where, and its settings, from the Company page .
Field	a group or the company	That group's or the company's own projects, read-only, plus reporting progress. The money is taken out.

A project outside your companies and groups is invisible to you: Gantry answers as if it didn't exist, rather than showing a locked button.

Moving a project to another group takes the right to delete it, plus an Admin or Editor role in the group it goes to. See [Companies, groups and roles](#).

Field, in more detail

The Field role is built for crews. A Field account:

- signs in to **My tasks** (see [Work, My tasks and Calendar](#)), its own assignments across every project it can see;

- reports progress: percent complete, work status, remaining work, checklist ticks and link attachments;
- never changes a project's structure: its tasks, their planned dates or the links between them. Its status reports do record actual dates: starting a task stamps today as its actual start, and finishing a started task stamps its actual finish;
- never sees money: task costs, contract time and the dollar totals in the schedule update narrative are left out;
- has no sidebar when Field is its only role. The top row carries **My tasks**, **Work** and **Calendar**, and the editor, Projects, Reports, People and Roster & equipment stay out of reach;
- never makes a crew link.

A Field account uses a full license. Report progress from a phone or tablet shows what a Field user does each day.

Master planning

Master planning is a capability, not a role. It lets someone:

- put a project into Draft and publish it, so crews see a checked plan instead of every save (see Draft and Publish);
- open the master plan, several projects on one date axis;
- open People, who works where across every project, day by day, and manage the company's saved crews;
- restore an earlier version of a Live project from History, since crews see a restore at once. The confirm opens with **Switch to Draft first** picked, so crews keep today's plan until someone publishes. A project a course uses as its template or answer key can't be switched to Draft, so its confirm offers no such choice (see Saving, history and opening projects).

Who has it. Every company Admin has it because of their role. A company Admin can give it to anyone else on **Company > Users & access**, in the **Master planning** card: tick the person, and it takes effect at once. Company Admins show there as ticked and grayed out, *by role*; a group Admin gets an ordinary checkbox, like any other member. A Field-only account can't be given it.

Without it, you can still edit, save and restore a project that is in Draft. Your changes wait there until someone with master planning publishes them. On a Live project, **Restore...** shows what the restore would change and who can do it for you: they can restore it, or switch the project to Draft so that you can. It names them when there are three or fewer. In Training, a student's copy, the class board and the projects students create there need no one: anyone who can edit them restores them. You can also book people by the day on a project you can edit (but not on a student's copy or a class board in

[Training](#)), one project at a time, with **Book people** on its Crew planning page (see [Book people day by day](#)). The same card holds **Allow up to 15 projects in the master plan** (the usual limit is 8).

Partner staff

[Partners](#) are firms that resell Gantry and run it for their client companies. Partner staff:

- see every project in every company their partner looks after, with a company Admin's full powers there;
- have their own partner dashboard for licenses and invoices;
- use no license anywhere.

[Look after your clients' companies](#) walks through their work.

The instance admin

The instance admin runs the whole Gantry installation, every company in it, and never uses one of your licenses.

Crews with only a link

A crew member doesn't need an account. Anyone who can edit a project, an Editor or an Admin, can make a [crew link](#) for it, and a company Admin can make an [itinerary](#) link for one person. Whoever holds the link opens the plan on a phone with no sign-in. It shows the work, never costs or anyone's account details. A link uses no license. [Send crews their links and itineraries](#) shows how.

People you only schedule, the names on your company's roster (Roster & equipment), don't need accounts or licenses either.

Who needs a license

- Every user with at least one membership in the company, counted once however many groups they are in. That includes Field accounts and [training](#) class accounts.
- A pending invitation holds a license until it is used or removed.
- A disabled user doesn't count, so disabling or removing someone frees their license at once.

These don't need one: partner staff, the instance admin, crews with only a link, and people on the roster who never sign in. [Licenses and billing](#) covers buying and managing licenses.

What the demo leaves out

The demo has no company account, so it has no roles, no Home, no People, Roster & equipment or Company page, no Draft and Publish, no master plan, no Day plan, no crew or itinerary links, and no project templates, calendar standards or company columns. Its sidebar lists Projects, Calendar, Crew planning and Reports.

Your account: sign in, profile and password

Your first sign-in from an invitation, what you see first, your photo, name and email, how long you stay signed in, and what to do about a forgotten password.

Your company's account lives at app.gantry.app. This page takes you from the [invitation](#) your admin sent to a working account, and shows where your own details live.

Your first sign-in

- 1 *Open your invitation link.* Your company admin sends it to you by email, or copies it into a text or chat message. It works once, and for 7 days.
 - 2 *Set your password.* The page greets you by name: *Welcome, your name — set your password.* Type a password of at least 8 characters under **New password (at least 8 characters)** and press **Set password & sign in**.
 - 3 *You are in.* Gantry signs you in straight away. From now on, sign in at app.gantry.app with your email and that password, then press **Sign in**.
-

If the page says *We couldn't open this link.*, the link has expired, has already been used, or the connection dropped. Try again, or ask your admin for a new one. **Go to sign-in** takes you to the ordinary sign-in page.

What you see first

Where you land depends on your role. [Who can see and do what](#) explains the roles.

- **Admin** and **Editor**: you land on [Home](#), with the [sidebar](#) on the left. A company admin also sees **Company** in the sidebar, under **Administration** (see [the Company page](#)).
- **Field**: you land on **My tasks** (see [Work, My tasks and Calendar](#)), your own assignments across every project you can see. There is no sidebar. The top row carries **My tasks**, **Work** and **Calendar**, and on a phone the same three sit at the bottom of the screen.
- *Partner staff* who belong to no company land on their [partner dashboard](#).

Your avatar sits at the right end of the top row. Its menu holds **Profile...**, **Change password...**, **Keyboard shortcuts...**, **Help & support...** and **Sign out**, and it is the same menu wherever you are.

Your profile

Open your avatar menu and choose **Profile....**

Your photo

Everyone starts with a colored circle of their initials. Under **PHOTO**, press **Upload photo...** to use a picture instead. Ganttry crops it to a square and shrinks it before it uploads. **Change photo...** swaps it and **Remove photo** goes back to your initials. Your picture shows in the top row and in your company's user list, and only people who share a company with you, and the instance admin, ever see it.

Your name

Under **ACCOUNT**, type your name and press **Save** (or Enter). It saves at once and the dialog says *Name saved*. If you close the dialog with a new name typed and not saved, Ganttry saves it as it closes.

Your email

Your email is the address you sign in with, so changing it takes a confirmation.

-
- 1 Press **Change email....**
 - 2 In **Change email**, type the **New email** and your **Current password**, then press **Send link**.
 - 3 Ganttry emails a link to the *new* address. It works once, for 24 hours. Until you open it, Profile shows which address is waiting, and you keep signing in with the old one. **Cancel change** withdraws the request.
 - 4 Open the link and press **Confirm new email** on the page it opens. **Not now** leaves without changing anything, and the link keeps working until it expires.
-

From then on you sign in with the new address, and your old address gets a notice that it changed. While a change is waiting, your company admins see an *email change pending* badge beside your name in their user list.

If Ganttry can't send email, **Change email...** is off and Profile says so. Ask a company admin: they can correct your name or email directly with **Edit...** in their user list. The steps for admins are in [Invite people, set roles and manage licenses](#).

Profile also shows your **Role**. Your company admin sets it.

How long you stay signed in

A device you sign in on stays signed in for up to 30 days. If you don't use Gantry on it for two weeks, it asks you to sign in again sooner. A tablet left in a truck over a long break will ask for your password when you come back. **Sign out** in your avatar menu ends the session on that device.

Your password

- *To change it*, choose **Change password...** in your avatar menu, type your **Current password** and a new one of at least 8 characters, then press **Change password**.
- *If you forgot it*, press **Forgot password?** on the sign-in page. When Gantry can send email, type your email and press **Send reset link**. The link works once, for one hour. Otherwise the page says to ask your company admin, who can make you a reset link or set a new password for you.

Setting a new password, by any of these routes, cancels every other invitation or reset link still out for your account. After five wrong passwords in a row, the account is locked for 30 seconds. After that, each further wrong password locks it again, for twice as long each time, up to 15 minutes. A successful sign-in clears it. [Security and sign-in](#) has the details.

Good to know

- Your name and email change on everything from now on. Records made before the change, such as who saved a version, keep the name they had at the time.
- A [training](#) class account keeps the name its trainer set, and an email Gantry generated; neither can be changed from Profile.

Create a project and build its schedule

Start a new project from a template or a blank page, add tasks, durations and links, and watch the Gantt chart and the critical path build.

By the end of this workflow you have a new project with its tasks, their durations and the links between them, and a [Gantt chart](#) that shows the [critical path](#).

Who does this

Project managers and schedulers: anyone who is an Editor or an Admin in the company or group the project will live in. Field accounts can't create projects. See [Who can see and do what](#).

Before you start

- Decide where the project lives. If you belong to more than one company or group, Ganttry asks.
 - If your company keeps [project templates](#), know which one fits. A company admin sets them up (see [Set up your company](#)).
 - Have the project's start date and a rough list of its phases and tasks.
-

Steps

- 1 *Open the New project dialog.* Press **+ New project** on [Home](#) or on [Projects](#), or choose **File ▾ → New project** in the editor. The **New project** dialog opens (see [Creating a project](#)). Nothing is created until you press **Create project**.
 - 2 *Pick where it lives.* If you belong to more than one company or group, choose one in **Company or group**. It starts on the company the [scope control](#) at the top shows, unless your role there is Field.
 - 3 *Pick a start.* Under **START FROM**, choose **Blank project**, or a [project type](#). A type selects its default project template for you, and you can pick another template of that type.
 - 4 *Fill in the details.* Under **PROJECT DETAILS**, type the **Project name** and the **Project start date**, and check the **Working calendar**. The **WHAT THIS PROJECT STARTS WITH** band shows what your company's settings and the template will add.
-

-
- 5 *Create it.* Press **Create project**. The editor opens on the new project. If you started from a template, its tasks are already there, dated from the start date you typed.
-
- 6 *Add tasks.* Click a cell in the **Task Name** column and type. Enter saves the cell and moves down a row. The **Task** button in the toolbar inserts a new row under the one you have selected.
-
- 7 *Give each task a duration.* In the **Duration** column type working days: **5** , **5d** , **2w** , or hours such as **36h** . A duration of **0** makes a milestone.
-
- 8 *Group tasks into phases.* Put a phase name on its own row, select the tasks under it and press **Indent** (or **Tab**). The phase row becomes a summary task that rolls up its tasks' dates. **Outdent** (**Shift+Tab**) moves a task back out.
-
- 9 *Link the tasks.* In the **Predecessors** column type the row number of the task that comes first: **12** means *after task 12 finishes*. **12SS** starts together with task 12, and **12FS+3d** waits three working days after it. You can also select two rows and press **Link**, or drag from just past the end of one bar onto another bar in the chart. The **Successors** column fills in by itself. See link types and lag.
-
- 10 *Watch the dates.* Ganttry works out every start and finish from the durations, the links and the working calendar, and the bars move as you type. **Fit** shows the whole project in the chart.
-
- 11 *Find the critical path.* Press **Critical** in the toolbar. The tasks that decide the finish date turn red. To include tasks that are nearly critical, set **Critical total float (working days)** in Project settings (click the project's name in the top row).
-

Good to know

- *Typing a date pins the task.* Typing into a task's **Start** cell holds it to that date or later, even if its predecessors finish sooner. Empty the cell to let the links decide again. Right-click a task and choose **Constraint & deadline...** for the other kinds of pin. Scheduling explains them.
- *Saving is automatic.* There is no Save button to remember. To keep the plan as it is now under a name, choose **Save a version...** from the save chip's menu. Find and restore an earlier version shows how to go back.
- *Undo.* Ctrl+Z undoes, up to 100 steps.
- *Leaving the grid with the keyboard.* **Tab** indents in the grid, so press **Esc** , then **Tab** , to move on. **Alt+Shift+-** and **Alt+Shift+=** collapse and expand the selected phases.
- *Hidden columns.* Float, late dates and several others are hidden to start with. Right-click any column header and choose **Add or show columns...** to show them.

- *Changed your mind?* Closing the New project dialog after typing asks **Discard this new project?:** **Keep editing** goes back, **Discard** throws the draft away.
- *On a phone* the editor shows the grid on its own; the pane toggle in the top row swaps to the chart and back.
- *In the demo* every new project starts blank, because templates come with a company account.

Bring in a schedule from MS Project, P6 or Excel

Bring a schedule into Gantry from Microsoft Project, Primavera P6 or a spreadsheet, and update a project in place when a newer file arrives.

By the end of this workflow a schedule you built somewhere else is a Gantry project, with its tasks, links and dates, ready to edit.

Who does this

Project managers and schedulers: an Editor or an Admin in the company or group the project will live in. See [Who can see and do what](#).

Before you start

Get the file into a form Gantry reads:

From	Save it as
Microsoft Project	In Project, File → Save As → XML. Gantry can't read an <code>.mpp</code> file directly.
Primavera P6	In P6, File → Export → XER. If the file holds several projects, Gantry takes the first.
Excel or another tool	An Excel workbook or a CSV file, one task per row, with a header row.

To update a project you already imported, open that project in the editor first.

Steps

Bring in a new project

- 1 *Open the import.* Choose **File ▾ → Import file...** in the editor, or press **Import...** on [Home](#), and pick your file. Gantry looks at what is inside the file, not at its name, so a file with the wrong ending still opens.

- 2 *Check a Microsoft Project or P6 file.* The import dialog lists the format, the project's name, how many tasks it has, when it starts and its calendar, followed by every warning — anything Gantry had to change or leave out — under a count such as `This file has 14 warnings.` Read them, then press **Import as a new project**.

- 3 *Or map a spreadsheet.* A CSV or Excel file opens the column-mapping wizard. Gantry matches the headers it recognises, such as Name, Duration, Predecessors and % complete. Check each match, and untick **First row is column headers** if your file has none. The preview underneath shows the first rows as they will land.

- 4 *Keep extra columns.* Columns Gantry doesn't recognise are listed under the mapping. Tick the ones you want and they arrive as your own text columns, under the title you give them.

- 5 *Save the mapping for next time.* Press **Save...** beside **Preset** and name it, for example after the estimating program the file came from. Next time, pick the preset. Gantry already knows the exports of P6 activity spreadsheets and Microsoft Project tables, and picks them for you.

- 6 *Choose where the tasks go.* Pick **Import as a new project**, or add the rows to the end of the project you have open. The wizard's last button says which it will do.

- 7 *Read the warnings.* Press the last button. If the rows raise any warnings, nothing is imported yet: the wizard lists every one above its buttons, under `This file has 15 warnings. Nothing is imported yet.`, and the button becomes **Import anyway**. Fix a column choice and press again, or press **Import anyway** to bring the rows in as they are. A file with no warnings imports at once.

- 8 *Pick the company or group.* If you belong to more than one, Gantry asks where the new project lives.

The new project opens in the editor. If you started on Home, Home closes to show it.

Update a project from a newer file

When the owner sends a newer Microsoft Project or P6 export of a project you already imported, update it instead of importing a second copy.

- 1 Open the project in the editor, then choose **File ▾ → Import file...** and pick the newer file.

- 2 Beside **Import as a new project** the dialog offers a button that names your open project: *Update "your project"....* Read the file's warnings in this window, then press it.

- 3 A review lists what the file adds, removes and changes, in sections. Its only warnings come from matching the file to your project, such as a source ID the file repeats. The changes table shows the first 200 changed fields; [Show all 230 changes](#) (with your file's count) shows the rest. Untick any section you don't want, then apply. The whole update is one step you can undo with Ctrl+Z.
-

Good to know

- *What an update leaves alone.* Ganttry matches tasks by the identity the file gave them, not by name. Tasks you added in Ganttry, and the notes, colors, crew, equipment, assignments, quantities, costs and your own columns on every task, are never touched. Links you drew in Ganttry between Ganttry tasks stay too. Task order and outline follow the new file.
- *Spreadsheets can't update in place.* A spreadsheet row has no lasting identity, so a CSV or Excel file always becomes a new project or adds rows to the end of one.
- *Microsoft Project calendars.* Task calendars that at least one task uses come across as named calendars with their working weekdays and their holidays (non-working exception days). Extra working days, and anything a calendar inherits from a base calendar, are not imported. Every calendar uses the file's hours per day. At most 20 task calendars import; tasks on the others use the project calendar, with a warning.
- *P6 calendars.* The project's base calendar comes across with its workweek, exception days and hours per day, and each calendar a task uses arrives as a named calendar.
- *Start dates become pins.* A start date in a spreadsheet, or a Start-No-Earlier-Than in a Microsoft Project or P6 file, holds the task to that date or later, even when a predecessor finishes sooner.
- *Going back the other way.* Ganttry writes Microsoft Project XML but not P6 XER. [Print and export](#) lists what each export carries.

Publish the plan crews see

Put a project into Draft so crews keep a checked plan while you work, then publish it to them, alone or several projects at once from the master plan.

🔗 Needs [Master planning](#)

By the end of this workflow your crews see the plan you chose to give them, and your own edits in progress stay out of their view until you publish again.

Who does this

A planner with [master planning](#): every company Admin, and anyone else a company Admin has given it (a Field-only account can't have it). Without it, you can still edit a project that is in [Draft](#); your changes wait for someone with master planning to publish them. See [Who can see and do what](#).

Before you start

- Every project starts **Live**: crews see each save the moment it lands. You only need this workflow when you want to check changes before crews see them.
 - The project is open in the editor, and your last change has saved.
 - Crews see the plan through their [crew links](#), **Work, My tasks, Calendar** and the **Day plan** (see [Work, My tasks and Calendar](#) and [the Day plan](#)). The **What crews see** dialog lists these views.
-

Steps

Put the project into Draft

- 1 *Open the choice.* In the editor choose **Tools ▾ → What crews see....** The dialog shows **Live** (crews see every save as it lands) and **Draft** (crews see the plan you last published).
 - 2 *Switch to Draft.* Choose **Draft**, then press **Publish now and switch to Draft**. Crews keep the plan as it is right now.
 - 3 *Keep working.* Edit and save as usual. A second chip sits beside the save chip: **Draft · published** with the time, then **Draft · unpublished changes** once you have saved something crews don't have yet.
-

Publish your changes

- 4 *Check first.* In **What crews see...**, **See what crews see** opens the published plan, read-only.
 - 5 *Publish.* In the same dialog press **Publish....** **Publish to crews** opens: *Publishing replaces the plan crews are seeing with the plan you have now.* Press the publish button, which says how many projects it will publish. The chip goes back to the time of this publish.
 - 6 *If someone else saved meanwhile.* When a teammate saved the project after you last loaded it, nothing is published and the dialog names who saved and when. Press **Include it anyway** to publish the project with their change, or **Cancel** to leave it.
-

Publish several projects at once

- 7 Open the master plan, tick the projects to publish and press **Publish....** Every ticked project publishes together, or none do. A line in the dialog counts the scheduling conflicts in what you are publishing, such as a person booked on two projects the same day. It never stops the publish. **Publish...** on People opens the same dialog with the Draft projects that page shows, and is grayed out while none of them has anything to publish.
-

Go back to Live, or throw changes away

- 8 *Go Live.* In **What crews see...** choose **Live** and press **Go Live**, or **Publish and go Live** when you have unpublished saves. From then on crews see every save again.
 - 9 *Discard unpublished changes.* **Discard unpublished changes**, confirmed with **Restore the published plan**, returns the project to the plan crews are seeing. Gantry keeps your current plan in History first, as an automatic save, so **Restore...** can still bring it back. If a teammate saved after the last publish, it refuses and names them.
-

Good to know

- *Crew progress goes straight through.* When a crew reports percent complete, work status, remaining work, a checklist tick or an attachment on a Draft project, it reaches the plan crews see at once, without waiting for a publish.
- *Bookings on People wait too.* A booking on People never publishes. The first one into a Draft project says so, for example *Bridge 12 is a Draft — crews see it after you publish.* A stay is the exception: it reaches the person's Day plan and itinerary at once, without a publish.
- *Day notes.* A day note you tick for crews in **Day notes...** reaches them with the next publish while the project is in Draft. Unticking a note hides it from crews at once.

- *Where the Draft shows.* A project in Draft carries a *Draft* pill on [Projects](#), [Home](#), [Crew planning](#) and [Reports](#), and in the legend on People. A crew link reads *Published* with the time, where a Live project's link reads *Live · updated*. A [lookahead](#) printed from a Draft says *DRAFT — not published to crews* in its header.
- *Notifications wait.* Assignment and status notifications to Field accounts wait while a project is in Draft. A blocked-task notification and a published notification always go.
- *Project files* are always the latest; a Draft doesn't hold them back.
- *Restoring a Live project.* Restoring an earlier version of a Live project from History opens with **Switch to Draft first** picked: the project goes to Draft with today's plan published, then the restore lands, so crews keep today's plan until you publish. Its button reads **Switch to Draft and restore**; **Restore now** shows crews the restored plan at once. A project a course uses as its template or answer key can't be switched to Draft, so its confirm offers no such choice.
- *The master plan needs a wide screen.* At 780 pixels wide or narrower it refuses rather than squeeze three weeks of dates side by side, so publish several projects from a laptop or desktop.

Update progress and the data date

Save a baseline, then at each update set the data date, record actual dates and percent complete, log weather days, and read planned against reported progress.

By the end of this workflow your project's dates reflect what really happened on site up to the data date, and you can see how far it has moved from the plan.

Who does this

The project's scheduler or project manager: an Editor or an Admin. Field accounts report percent complete and work status from the field; starting a task there stamps its actual start, and finishing a started task stamps its actual finish. The data date is set here, and so is any actual date that needs entering or correcting. See [Who can see and do what](#) and [Report progress from a phone or tablet](#).

Before you start

- The project's schedule is built and linked (see [Create a project and build its schedule](#)).
 - For the first update, save a baseline first (step 1). Without one there is nothing to measure slippage against.
 - Have the site's progress to hand: which tasks started, which finished, and on what dates.
-

Steps

- 1 *Save a baseline (once, before the first update).* Click the project's name in the top row to open Project settings. Under **Baselines**, press **Save baseline...** and name it. The new baseline becomes the active one. You can keep up to five, and mark any one active later.
 - 2 *Enter percent complete.* In the grid's **% Comp.** column type each task's percent complete. You can also type it on the [Projects page](#), in the **This week** pane, for a project you don't have open.
 - 3 *Open Update progress.* Choose **Tools ▾ → Update progress....**
 - 4 *Set the data date.* In **Data date (status as of)** pick the date your update runs to, usually today or the end of the period. The table lists the tasks that are not complete and were scheduled to have started by that date.
-

-
- 5 *Record the actual dates.* For each task, fill in **Actual start** and, if it finished, **Actual finish**. Use **scheduled start** and **Use scheduled finish** copy the planned date across when the task ran to plan. Type **Remaining** in working days (**3** or **3d**) for a task still underway. Leave a field blank to keep what is there.
-
- 6 *Apply it.* Press **Apply progress update**. Finished work stays on its actual dates, work in progress carries on from the data date, and work not yet started is scheduled from the data date forward, all still following their links. A blue line marks the data date on the chart. One Ctrl+Z undoes the whole update.
-
- 7 *Log weather and other lost days.* In Update progress press **Contract-day ledger...** (see [Contract days and weather days](#)). Enter the contract's **Working days allowed**, any extensions, and the first chargeable date. Every working day through today counts as charged. Click a day on the month grid and mark it **Weather**, **Suspension**, **Holiday** or **Other**, with a note. That day then stops counting against contract time.
-
- 8 *See what moved.* Show the **Start Var** and **Finish Var** columns (right-click a column header, **Add or show columns...**): positive numbers are days late against the [active baseline](#), negative are days ahead. The baseline's gray bars draw under the current ones; the toolbar's **Baseline** button picks which baseline is drawn.
-
- 9 *Read planned against reported.* Open **Projects**. Each row shows **Planned progress** (where the plan says the project should be today) beside **Reported progress** (the percent complete entered), with **Tasks behind** and **Last progress update**.
-

Good to know

- *Weather days don't move dates by themselves.* Logging a day in the ledger is contract accounting only. To also reschedule, tick **Mark as a non-working day** on that day's entry: it adds the day to the project calendar, and removing the entry takes it off again.
- *Replacing a baseline.* In Project settings, **Replace with current plan** overwrites a baseline with today's plan. Use it only when the plan has formally changed.
- *Out-of-sequence work.* If a task started before its predecessor allows, the status line says so after you apply, and its tooltip flags it. Remaining work still follows the links.
- *Stale progress.* On the Projects page a task underway with no percent complete edit in over a week is flagged as needing an update rather than trusted.
- *The monthly narrative.* Each time you move the data date forward, Gantry keeps a snapshot for the [monthly narrative](#). See [Write the monthly schedule update](#).

- *On a phone*, the Update progress dialog opens full-screen.

Check the schedule before you submit it

Run the schedule quality checks, work through each failing check, re-run until the score is where you want it, then send the report with your submittal.

By the end of this workflow your schedule has been through the same kind of audit an owner or a DOT reviewer runs, the problems it finds are fixed or explained, and you have a report to send with it.

Who does this

The project's scheduler or project manager: an Editor or an Admin. See [Who can see and do what](#).

Before you start

- The schedule is built and linked.
 - If this is a progress update, apply it first (see [Update progress and the data date](#)). The progress checks only run once the project has a data date, and one of them looks for a baseline.
-

Steps

- 1 *Open the checks.* In the editor choose **Tools ▾ → Schedule quality checks...** ([Schedule quality checks](#) describes all sixteen checks and their thresholds). From **Reports** (see [the Reports page](#)), pick **Schedule quality checks** in the library and press **Open schedule quality checks....**
 - 2 *Read the score.* The top line gives a percentage and how many checks pass, for example **88% – 14 of 16 checks pass**. Below it, each check shows **PASS** or **FAIL**, its figure, and how many tasks it flags. Hover a check's name to see what it looks for. Checks that can't apply yet, for example because there is no data date, are left out rather than failed, and listed under **Not checked** below the results, each with its reason, such as **Work missing a progress update – needs a data date**.
 - 3 *Open a failing check.* Click it to list the tasks that fail it, each with its row number and name.
 - 4 *Jump to a task.* Click a task in the list. The dialog closes and the task is selected in the grid.
-

-
- 5 *Fix it.* What the fix is depends on the check. A task with **Missing logic** needs a predecessor or a successor. A **Leads (negative lag)** link needs its negative lag removed. **Negative float** means a deadline or a finish constraint the chain of work can't meet. **Unstaffed crew** means a crew entry still marked with .
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- 6 *Run it again.* Open **Schedule quality checks...** again. The score and the lists reflect your changes.
-
- 7 *Adjust the thresholds, if your contract says so.* Open **Thresholds** below the checks, change the numbers your owner agreed, and press **Apply thresholds**. They are saved with the project, so everyone who opens it uses them. **Reset to DCMA defaults** puts them back.
-
- 8 *Send the report.* **PDF report** makes a letterhead document with the score, the failures and the tasks behind each one, for your submittal. **Copy report** puts a plain-text summary on the clipboard for an email. Both list the checks that didn't run, with their reasons, so a reviewer sees why a check is missing.
-

Good to know

- *What is checked.* Sixteen checks adapted from the DCMA 14-point assessment, in four families: logic (missing links, leads, long lags, relationship types), constraints and float, progress (once there is a data date), and crews and equipment (once the project uses them).
- *Finished work doesn't fail.* The percentage checks measure the work still to do.
- *Where else the score shows.* The same score, called **Schedule checks** wherever it shows, appears in the column you can add on [Projects](#), on the tile and card of [the project Dashboard](#), where the card's **Details...** opens this dialog, and in the **Projects** table on [the Company page](#).

Print the 3-week lookahead and other paper

Filter the schedule to the next three weeks, print it as a one-page lookahead, save the view and the print settings, and export to Excel, CSV or MS Project.

By the end of this workflow you have the superintendent's three-week [lookahead on paper](#) or as a [PDF](#), and the settings saved so next week's takes two clicks.

Who does this

Project managers, schedulers and superintendents who work in the editor: Editors and Admins. See [Who can see and do what](#). Crews get their own paper from their [crew links](#); see [Run the day from the handout](#) or the [Day plan](#).

Before you start

- The project is open in the editor, and its progress is up to date (see [Update progress and the data date](#)). The lookahead leaves out finished work, so percent complete matters.
-

Steps

- 1 *Filter to the next three weeks.* Press **Views** in the [toolbar](#) and choose **3-week lookahead**. The grid and chart now show only incomplete work that overlaps the next 21 days. Phase rows stay, dimmed, so each task keeps its context. The status bar says how many tasks are showing.
 - 2 *Open the PDF dialog.* Choose **Export ▾ → PDF...** With the [filter](#) on, the dialog offers to print the filtered tasks only, ticked, and fills the **Date range** from the filter's three weeks. The preview shows a one-page, date-cropped lookahead.
 - 3 *Choose what prints.* Under **Content**, pick **Table + Gantt chart**, **Gantt chart only** or **Table only**, and tick the columns you want. **Crew histogram** adds the crew bars under the chart; **Legend placement** puts the key on a **Separate page** or **With schedule if it fits**.
 - 4 *Print or save.* **Print...** opens the PDF in a new tab with the print dialog ready. **Export PDF** saves it as a file.
-

- 5 *Save the print settings.* Under **Saved print settings**, press **Save settings...** and give them a name, for example *Weekly lookahead*. Next time, pick that name from the same list. A company admin also sees **Set as company default...**, which puts these settings in everyone's Saved print settings list as ★ *Company default*.
- 6 *Save the view.* Back in the editor, choose **Views** → **Save current view...** and name it. A saved view keeps the filter, the columns showing and the chart's zoom, and comes back with one click from **Views**. Click **3-week lookahead** again, or **Clear filter**, to see the whole project.

Other paper and files

- 7 *Excel or CSV.* **Export** ▾ → **Excel (.xlsx)** or **CSV**. With a filter on, a small dialog asks whether to export only the filtered tasks, ticked by default. Row numbers stay as they are in the project, so the gaps show where rows were left out.
- 8 *Microsoft Project.* **Export** ▾ → **MS Project XML (MSPDI)** writes the whole project, whatever the filter, because Microsoft Project needs every task and link. Open it in Microsoft Project with File → Open. Primavera P6 imports the same file.

Good to know

- *The filter is only yours.* Filtering never changes the project and your teammates keep seeing every task. You can still edit while filtered; only dragging rows to reorder them is off.
- *Your own filters.* **Views** → **Filter...** combines conditions: text, crew, progress state, color tags, dates, a rolling window, near-critical work and crew still needed.
- *Where your settings live.* Saved views and print settings follow your account, on any computer you sign in on.
- *A lookahead from a Draft.* If the project is in Draft, the printed lookahead says *DRAFT* — *not published to crews* in its header.
- *Crews and names.* The lookahead above lists tasks. The crew-and-equipment lookahead, with the names of the people and units on each day, is on the Reports page; see Report on progress, crews and equipment.
- *What MS Project doesn't get.* Crew, equipment, costs, your own columns, colors and text styles stay in Gantry.

Find and restore an earlier version

Save a version of a project by name, find it or an automatic save in History, look at it, compare it with today's plan and restore it, and copy, archive or bring back whole projects.

By the end of this workflow the project's tasks, dates and links are back the way they were at an earlier point, keeping today's progress and other records, and today's bookings unless you choose otherwise — or that earlier point sits beside it as a project of its own. Saving a version before a big change gives you a named point to come back to.

Who does this

- Any Editor or Admin who can open the project saves versions, looks at them, compares them, and restores a project that is in Draft.
- Restoring a *Live* project — and every project is Live unless it is in Draft — takes [Master planning](#), which company admins have by role, because crews see a restore at once. Anyone else still gets **Restore...** and can read what it would do, but the confirm says "Only an admin or a master planner can restore a Live project." and who to ask. In [Training](#), a student's copy, the class board and the projects students create there can be restored without master planning: anyone who can edit them restores them.
- A Field account never opens History.
- Without a company account, and in the demo, whoever uses the browser can do all of it.

See [Who can see and do what](#).

Before you start

- Ganttry saves as you work; there is no need to press Save. The [save chip](#) in the top row shows "● Unsaved changes", then "... Saving", then "✓ Saved" with the time. To keep the plan as it stands under a name, save a version (step 1).
- Know roughly when the project was last right: the date, who was working on it, or the name of the version.

Steps

Save a version before a big change

- 1 *Choose Save a version.* Click the save chip and choose **Save a version...**, or choose **Tools ▾ → Save a version....**
 - 2 *Name it.* Type a **Name** of up to 40 characters that no other saved version of this project uses, and a note if you like. *What's saved* shows how many tasks the plan has and when it finishes. Press **Save**; the status bar reads `Saved "Plan A" in History`.
-

A project keeps 20 saved versions. At 20, the dialog says so and saves nothing: delete one in History first.

Find the version

- 3 *Open History.* Choose **Tools ▾ → History...**, or click the save chip and choose **History...**. A company admin can also press **History...** on the project's row on the [Company page](#).
 - 4 *Find the version.* History has two lists, newest first:
 - **Saved versions** — the versions saved by name, each with its note, who saved it, when, the day it finishes and its number of tasks. The "Before restoring ..." rows that restores save are here too.
 - **Automatic saves** — what Gantry saved as people worked. Each row reads "Revision" and a number, the newest marked *latest*, with when, by whom and the number of tasks.
 - 5 *Look at it.* **Look** opens the version read-only over the editor, under an amber band that names it. Scroll and read; nothing you do there changes the project. **Close**, or `Esc`, brings you back to the editor as you left it.
 - 6 *Compare it with now.* **Compare with now** sets the version against the plan on your screen: how the finish moves, then the tasks that moved, the tasks added and removed since, and the bookings that differ.
-

Restore it

- 7 *Open the confirm.* Press **Restore...** on the row or in Look's band, or, at the foot of Compare, the button that names the version ("Restore Plan A...", or "Restore the earlier plan..." on a "Before restoring ..." row). Nothing changes yet. The confirm, "Restore Plan A?", saves your newest edits, reads today's plan, says how the finish moves and lists what the restore does:
- **Kept from today** — on the tasks in both plans, today's bookings and everything recorded on them: progress, actuals, checklists and attachments, whoever entered them, and the office's notes;
 - **Kept because it has progress, a checklist tick or an attachment** — a task only in today's plan that has progress, a status other than **To do**, an actual date, remaining days, a ticked checklist item or an attachment (a note alone doesn't keep it);
 - **Comes back unbooked** — tasks only in the version, back without their people, who may be busy elsewhere by now; People shows them as needing people;
 - **Dropped · only in today's plan** — the other tasks only in today's plan go, with their bookings and their notes.
-
- 8 *On a Live project, choose when crews see it.* Under the lists the confirm says the project is Live and offers two choices. **Switch to Draft first** is picked when it opens: the project goes to Draft, and crews keep today's plan until someone publishes (see [Publish the plan crews see](#)). **Restore now** restores it with crews seeing it at once. When the confirm offers no such choice, as on a project in Draft or one a course uses as its template or answer key, skip this step.
-
- 9 *Decide about bookings.* **Keep today's bookings** is ticked each time the confirm opens. Leave it ticked to keep who is booked now. Untick it to bring back the bookings and [Assigned To](#) the version had; the confirm then lists today's bookings that go and the version's that come back and, signed in, checks whether those people are booked on another project on those days. Progress, actuals, checklists, notes and attachments stay either way.
-
- 10 *Restore.* The confirm says "Today's plan is saved first, as "Before restoring Plan A". You can restore it from History." Press the button. With **Switch to Draft first** picked it reads **Switch to Draft and restore**; otherwise it names the version ("Restore Plan A"). The project takes the restored plan at once, and the status bar reads `Restored Plan A · today's plan is in History` (after a switch to Draft, `Bridge 12 is in Draft · Restored Plan A · today's plan is in History`).
-

Undo a restore

- 11 *Restore the plan from before.* A restore can't be undone with `Ctrl+Z`. Instead, open History and press **Restore...** on the "Before restoring Plan A" row. Its confirm asks "Restore the plan from before Plan A?", the tasks it brings back keep the bookings they had (**Comes back with its bookings**), and its button is **Restore the earlier plan**. That restore saves its own "Before restoring ..." row, so you can change your mind again.
-

Or copy it instead

- 12 *Make it a project of its own.* In the row's $\cdots$ menu, **New project from this** makes the version a separate project, named after it — "Bridge 12 (Plan A)" — and opens it. This project stays exactly as it is. The copy has no bookings and no one on Assigned To, and the status line says so. Use it to rescue part of an old plan.
-

Copy, archive or bring back a whole project

- 13 *Open your projects.* Go to Home, or choose **File ▾ → Open project...** (`Ctrl+O`) for the **Open a project** page. Each project's row ends with $\cdots$, its menu.
- 14 *Copy a project.* **Make a copy...** in a project's $\cdots$ menu asks for a name and makes an independent copy, without bookings or assignments. The original is untouched.
- 15 *Archive a finished project.* **Archive** hides it from the lists without deleting anything. Tick **Show archived** in the **Sort ▾** menu to see archived projects, and **Unarchive** to bring one back.
-

Good to know

- *How long History keeps them.* Saved versions stay until someone deletes them; a project keeps 20. Besides them, it keeps the newest 3 "Before restoring ..." rows and the last 30 automatic saves, a new one every 5 minutes or when someone else saves; older ones roll off. **Keep this one...**, in a row's $\cdots$ menu, makes an automatic save or a "Before restoring ..." row a saved version that stays.
- *Unsaved work comes first.* **Save a version...** and a restore both save your newest edits first, and refuse if they can't, so nothing you typed is lost.
- *Teammates.* While you have History, **Save a version...**, Look, Compare or the confirm open, a teammate's save waits, and lands when you close them.
- *When two people save.* If a teammate saved the same project while you had unsaved changes, a review dialog shows exactly what differs and lets you keep their version, keep yours, save yours as

a separate copy, or decide later. When their save was a restore, the review says so: "Since your last save, Kim Walsh restored Plan A. Keep yours puts back the plan from before that restore." Nothing is ever overwritten without asking.

- *Copies have no bookings or assignments.* A copy, from **New project from this, Make a copy...** or a review's separate copy, keeps what crew and equipment each task needs but none of the people and machines booked on it, and no one on Assigned To. The status line ends · *the copy has no bookings or assignments*, or names only the bookings or only the assignments, by what the source had. On People the review offers no copy for a project People saves on its own, since the copy would drop the bookings People saves. For the project open in the editor, the review is the editor's own and offers the copy, without the bookings made on People.
- *If a save fails.* When you leave a project whose save failed, Gantry asks whether to stay, and tries the save once more as you go. If that fails too, it keeps your changes, and the status bar shows *Couldn't save* with the project's name and *click to recover*. Clicking it reopens the project and puts your changes back; if someone else saved it meanwhile, the review opens instead, comparing your changes with theirs.
- *Delete is permanent.* **Delete...** in a project's ... menu, shown only where you are allowed to delete, removes a project and its history for good, saved versions included. Archive is the safe choice. **Delete...** on a saved version in History can't be undone either.
- *A file of your own.* **File ▾ → Save a copy (JSON)** (Ctrl+S) downloads today's plan as a file you can import later. It holds none of the project's History.
- *Draft projects.* Discarding unpublished changes also keeps your current plan in History first, as an automatic save; see Publish the plan crews see.
- *Without a company account.* History lives in your browser: 5 saved versions per project, 3 "Before restoring ..." rows and the last 5 backups, 4 minutes apart, under **Automatic saves**, where each row reads "Backup" and names no one. Saving or keeping a version, and a restore, refuse and change nothing when the browser is nearly out of room (delete a saved version in History, then try again); saving a version and a restore also refuse while another tab has saved a different plan of the project. Another browser or device has none of them. The public demo erases them, with your changes, every time the page is refreshed.

Write the monthly schedule update

Produce the monthly schedule update narrative from the changes since the last update, edit it, and send it as a PDF or as the body of an email.

By the end of this workflow you have the written [narrative](#) that goes with a monthly schedule submittal: what progressed, how the critical path moved, what changed in the schedule, and the delays and weather behind it.

Who does this

The project's scheduler or project manager: an Editor or an Admin. See [Who can see and do what](#).

Before you start

- The narrative needs a point to compare against. Each time you move the [data date](#) forward in **Update progress...**, Gantry first keeps a snapshot of the schedule as it stood before that update. The narrative compares the schedule now with the latest snapshot. If you have never moved the data date forward, the dialog says no earlier update is saved yet.
 - Apply this period's update first (see [Update progress and the data date](#)).
 - If you track contract days, log this period's weather days in the [contract-day ledger](#) first; the narrative reads them.
-

Steps

- 1 *Open the narrative.* In the editor choose **Tools ▾ → Update progress...** and press **Schedule update narrative....** From **Reports** (see [the Reports page](#)), pick **Schedule update narrative** in the library and press **Open schedule update narrative....**
-

-
- 2 *Read the draft.* The **Schedule update narrative** dialog names the update period and drafts four sections from what changed since the last update:
- **Progress this period:** tasks completed and started, the overall percent complete moved, and earned value when the tasks carry costs.
 - **Critical path:** how far the forecast finish moved, in calendar days, and the tasks that joined or left the critical path.
 - **Schedule changes:** tasks added and removed, duration changes and logic changes, each link spelled out.
 - **Delays, weather & upcoming work:** the next 30 days of work, and your own notes on delays.
-
- 3 *Edit it.* Every section is plain text you can rewrite. Add the story behind the numbers: the rain week, the late steel, the owner's change. Your text is kept for this project and this data date.
-
- 4 *Start again if you need to.* **Replace my text with Gantry's draft** throws away your edits and puts the generated text back.
-
- 5 *Send it.* **Open PDF** makes a letterhead narrative with the detailed change lists under each section. **Copy as text** puts the whole narrative on the clipboard, ready to paste into an email.
-
- 6 *Add the quality report, if it is asked for.* To send the schedule quality report with the narrative, see [Check the schedule before you submit it](#).
-

Good to know

- *Your edits stay on this computer.* The text you type is saved on the device you typed it on, for that project and data date. Finish and send the narrative from one computer.
- *Weather and contract days.* When the project uses the contract-day ledger, the last section also reports days charged against days allowed, the forecast, and the weather and suspension days logged this period.
- *Two updates are kept.* Gantry keeps the snapshots of the two most recent updates, inside the project, so they travel with it. It takes at most one a day, and only when the data date moves forward, so correcting today's update doesn't use up the comparison.
- *Comparing other points in time.* The narrative always compares against the latest snapshot. To look at the project as it stood at an earlier save, open **History...** and press **Look** on that row, read-only; **Compare with now** lists what moved, was added or was removed since. **Save a version...** at each update keeps that point in History by name. **New project from this** still makes a separate copy, without bookings or assignments. See [Find and restore an earlier version](#).

Report on progress, crews and equipment

Pick the report that answers your question, choose its projects and weeks, drill into the numbers, and print or export them, from one project up to fifteen.

By the end of this workflow you have the numbers you were asked for, on screen, on paper or in a spreadsheet, with a stamp saying which projects they cover and as of when.

Who does this

Project managers, schedulers and operations managers: Editors and Admins. Field accounts don't have the [Reports](#) page. See [Who can see and do what](#).

Before you start

- The projects you report on have their progress entered (see [Update progress and the data date](#)).
- For crew and equipment numbers, the tasks carry crew and equipment (see [Plan crews and equipment for the weeks ahead](#)). To compare demand with what you have, your company's roster and fleet are on the [Roster & equipment](#) page.

Which report answers which question

Your question	The report
How far along is this project against the plan, area by area?	Project progress
Is the schedule sound enough to submit?	Schedule quality checks
What changed since the last update?	Schedule update narrative
How many contract days have we used, and will we finish inside them?	Contract-day ledger
What does the work cost, month by month?	Cash Flow
How many people and machines do the plans call for, and where are we short?	Crew & equipment demand
Who and what is booked on which project each day, and what sits idle?	Resource assignments
What does each crew need over the next three weeks, by name?	Crew & equipment lookahead

[Crew and equipment reports](#) explains the three crew and equipment reports. Four of the others have pages of their own: [Schedule quality checks](#), [The schedule update narrative](#), [Contract days and weather days](#) and [Cost loading and cash flow](#).

Steps

- 1 *Open Reports.* Choose **Reports** in the sidebar. The library on the left groups the reports under **Across projects** and **One project**. Pick one.
 - 2 *Choose the projects.* A cross-project report shows its projects as chips: **+ Add projects...** adds more and the x on a chip removes it. To report on one of them alone, click its name and choose **Only Bridge 12**; **The default (15 projects)**, at the top of **+ Add projects...**, puts the report's own choice back. With nothing chosen, it covers every active project you can see, up to 15. A one-project report has a **Project** select instead.
 - 3 *Set the view.* Only the controls a report uses appear. For **Crew & equipment demand: Weeks** from 2 to 26, **Crew** or **Equipment**, and **By project**, **By day** or **By week** for the chart's columns.
 - 4 *Read the lines above the result.* The *Viewing* line says what you are looking at, for which projects, over which weeks, in which units. When a project is in Draft, the next line says crews see its published plan, and when it was published. For **Project progress** you can also pick an earlier plan: **As of: The plan now** lists the project's saved versions and automatic saves. Pick one, such as Plan A, and the report, its lines and its PDF are worked out on that plan, at its own data date; choose **The plan now** to come back. See [the Reports page](#).
 - 5 *Drill in.* On **Crew & equipment demand**, click any cell with a number. **Contributing tasks** opens in the side pane: the projects and tasks behind it. **Open in schedule** opens that project in the editor, already filtered to those tasks. **< Back to report** returns you to the cell.
 - 6 *Take it with you.* Use the report's own buttons: **PDF...**, **Excel...** or **Copy**. Copy gives you a plain-text summary built for a text message from a site with no signal.
 - 7 *The four reports that live in dialogs.* **Schedule quality checks**, **Schedule update narrative**, **Contract-day ledger** and **Cash Flow** each show one button, such as **Open schedule quality checks....** It opens the chosen project in the editor with that dialog on top. Closing the dialog leaves you in the editor; **Reports** in the sidebar brings you back.
-

Start from the Projects page

- 8 On the [Projects page](#), tick up to 15 projects and press **Report on selected projects**: they open in the cross-project report you used last. For one project, select it and press **Report on this project** in the side pane to open **Project progress**.
-

One project at a glance

- 9 Open the project's **Dashboard** tab in the top row (see [the project Dashboard](#)). It shows percent complete against plan, finish variance against the baseline, the schedule checks score and failing checks, planned against actual by area, and the cash-flow curve when tasks carry costs. **Print** makes a clean one-page copy.
-

Good to know

- *Shared crews counted once.* If two tasks draw on the same crew, a demand report counts both. Join them in a [coverage set](#) and the shared people and machines count once. Select the tasks, right-click and choose **Shared coverage...**, or use **Tools ▾ → Shared coverage...**. **Ungroup** puts each task's own number back. [Shared coverage](#) explains the rules.
- *Booked by the day.* Someone booked on [People](#) for only some of a task's days fills it only on those days, in **Crew & equipment demand** and **Resource assignments** alike. To see or change who works where each day, use [People](#) rather than a report.
- *Nothing recorded isn't zero.* Where nobody entered how many of a trade or machine you have, the report says *Not recorded*, never 0, and draws no shortfall.
- *Late work shows separately.* Tasks that should have finished before the as-of date but are not done are listed under the chart and are not counted in the totals.
- *Every copy carries its stamp.* Screen, PDF, workbook and copied text all say *As of* the date and how many of the chosen projects are included.
- *Fifteen at most.* A cross-project report covers up to 15 projects. Past that it says which were left out rather than guess.

Plan crews and equipment for the weeks ahead

Put crew and equipment on your tasks, mark what you still need, name the people and machines, and read the weeks ahead trade by trade on Crew planning.

By the end of this workflow every task says which trades and machines it needs, the people and units filling them are named, and you can see, day by day, where the plan asks for more than you have.

Who does this

Project managers, schedulers and superintendents: Editors and Admins. A company admin keeps the company's roster and fleet up to date. See [Who can see and do what](#).

Before you start

- The project's tasks are in and dated (see [Create a project and build its schedule](#)).
- To name specific people and machines, your company's roster and fleet are on the [Roster & equipment page](#). A company admin adds people and units there, one at a time, with **Paste list...**, or from a payroll or fleet file with **Import file...**, and keeps the trade and machine-type lists under **Manage** → **Catalogs....** Adding someone to the roster doesn't create an account or use a license.

Steps

- 1 *Enter the crew.* In the grid's **Crew** column, type what each task needs: **3**, **1 foreman**, **2 laborer** or **laborer x2**. Trades are your own words, and Gantry suggests the ones you have used before, plus your company's people. To pick from a list instead, click the ▼ at the right edge of the Crew cell, or press **Alt+↓** while typing, and use **Add a trade or person...** in the popup's **CREW** section.
- 2 *Mark what you can't staff yet.* Add **?** to an entry: **2 carpenter?** means two carpenters needed and nobody found. The cell turns to a warning color, so hiring needs stay visible.
- 3 *Add the equipment.* Show the hidden **Equipment** column (right-click a column header, **Add or show columns...**). Then open **Crew & equipment...** from a task's right-click menu, or press Shift+F2, and pick a machine type and how many. A **?** marks a machine you still need. [Equipment on tasks](#) explains the popup.

- 4 *Name who and what.* In the same **Crew & equipment** popup, press **+ Assign person** or **+ Assign machine** on a slot and pick from the list. Your own group's people and units come first. A machine that is down, or a person who is away, shows with the reason and can't be picked. Press **Apply**. This books a person for the whole task; to book someone for only some of its days, use People.
- 5 *Open Crew planning.* Press the project's **Crew planning** tab in the top row (see Crew planning and the crew you still need). The page shows one row per trade and one column per day, shaded by how many people each day needs. Choose **Days** or **Weeks**, and a window from two weeks to the whole project. A cell with **(+2?)** still needs two people nobody has found.
- 6 *Say what you have.* Type in the **Have** column how many of each trade you can put on this project; leave it blank if you don't know, or type **0** for none. Every day where the plan asks for more than you have turns red, in the matrix, in the totals row and in the chart's crew band. With your company roster set up, an empty **Have** offers a suggestion from the roster; nothing turns red until you accept it.
- 7 *Check the machines.* The **EQUIPMENT** section below lists each machine type the same way. Its first column shows how many your company's fleet has and how many are down.
- 8 *See who fills a line.* Select a trade or machine row. The side pane shows its total and busiest day over the window, what you have, and under **FILLED BY** the people or units assigned to it on this project.
- 9 *Print it.* **Print** prints exactly what is on screen, in landscape, stamped with the project, the window and the day it prints.

Good to know

- *The crew band.* **Crew** in the editor's toolbar draws a crew histogram under the Gantt chart, colored by trade, with crew still needed hatched. Its expand button opens Crew planning.
- *Two tasks, one crew.* When two tasks really share the same people, join them in a coverage set so the demand counts them once. See Report on progress, crews and equipment.
- *Equipment you type or paste.* **2x Excavator** is two excavators. Unlike crew, a bare number at the front is part of the machine's name: **2 Roller** is one machine type called *2 Roller*.
- *Double-booked within the project.* Picking a unit already assigned elsewhere in this project on the same days warns you, naming the task, but doesn't stop you. Conflicts across projects show in **Resource assignments** on the Reports page.

- *Assigned people see it.* Assigning a person linked to an account also adds them to the task's **Assigned To**, so it appears in their **My tasks** (see [Work, My tasks and Calendar](#)). A booking on People does the same.
- *Book by the day.* **Book people** at the top of Crew planning, or **Tools ▾ → Book people**, opens this project on People: who works on it each day, and where else they are booked. It is there in a connected company, on a project you can edit, but not on a student's copy or a class board in [Training](#). See [Book people day by day](#).
- *Saved crews.* A crew that travels together, usually a foreman and their members, can be kept on the **Saved crews** tab of Roster & equipment. On People, **Book crew...** books them onto a project's open work in one step.
- *Tools to bring.* The hidden **Tools** column takes a comma list such as `Level, String line, Form oil`: a checklist printed on the crew handout, not tracked like equipment. See [Equipment on tasks](#).
- *Copies plan clean.* Copying a task, copying a whole project or making a template keeps what crew and equipment each task needs, and its tools. Copying a task drops the people and machines filling its slots but keeps its **Assigned To**; a whole-project copy (**Make a copy...**, or **New project from this** in History) and a template drop both.
- *Across projects.* For demand across several projects against the whole company's roster, see [Report on progress, crews and equipment](#).

Send crews their links and itineraries

Make a crew link for a project or an itinerary link for one person, check what the crew will see, send it, and turn it off when it is no longer needed.

By the end of this workflow a crew member has the plan on their phone without an account: either one project's work from a [crew link](#), or one person's work across every project from an [itinerary](#).

Who does this

- *Crew links*: anyone who can edit the project, an Editor or an Admin. A Field account never makes one.
- *Itinerary links*: a company Admin.

See [Who can see and do what](#).

Before you start

- The tasks carry their crew and equipment, and the people filling them are named, for the whole task or day by day (see [Plan crews and equipment for the weeks ahead](#) and [Book people day by day](#)).
 - If the project is in [Draft](#), a [crew link](#) shows the last published plan, so publish first if crews need your latest changes, bookings made on [People included](#) (see [Publish the plan crews see](#)).
 - Enter the project's **Site address** in Project settings. Without it the phone shows no address and the printed sheet says *Site address not entered*.
-

Steps

Make a crew link for a project

- 1 **Open Share**. In the editor choose **File ▾ → Share...**, and go to the **Crew links** section.
 - 2 **Choose what it covers**. Under **Dates it shows**, pick **Whole project**, or a from and to date for a window. Choose when the **Link expires**: never, or after 7, 30 or 90 days. Tick **Include task notes** if the crew should see them (off by default). Tick **Stop when the project is marked Complete** to retire the link when the job site wraps up.
 - 3 **Look first**. **Preview** shows the phone screen the crew will see, before anything is made.
-

-
- 4 *Make it.* Press **Create crew link**. The link appears once, in its own dialog. Copy it now and send it by text or email: Gantry doesn't show it again.
-

Make an itinerary link for one person

- 5 *Find the person.* Open the [Roster & equipment page](#), stay on its **People** tab, and select the person.
- 6 *Make the link.* In the side pane's **Itinerary** section, press **Make a link...** (or **Preview** first). An itinerary shows that person's work day by day on every project they are on, from last week to eight weeks ahead, with each project's address, and moves forward each time it is opened. A task they are booked on for only some of its days shows on those days alone. On a day a planner keeps them on a project with no task anywhere (a stay, made on People), it shows the project, its address and a line such as *On Bridge 12 · no task*.
-

What the crew sees

- 7 The link opens on today, with a strip of the week's days, **Today**, **Day** and **Week**, and **Refresh**. Each task shows its dates, status, crew and equipment with the names booked that day, its tools, and the day notes you ticked for crews. At the foot is **Print crew handout (Print itinerary on an itinerary)**, for a paper copy (see [Crew paper](#)).
-

Turn a link off

- 8 *A crew link:* **File** ▾ → **Share...** → **Active links**, then **Turn off** on its row. A phone that already has it open stops at its next refresh.
- 9 *An itinerary link:* **Turn off** in the person's **Itinerary** section. **Replace** makes a fresh link and turns the old one off. The **Itinerary links** tab on Roster & equipment lists every active itinerary link.
-

Good to know

- *What a crew link never shows:* costs, attachments, checklists, the project's own columns, or anyone's account details. A window link shows work outside its dates without the task names.
- *Nothing updates on its own.* The page reads the plan again when the crew taps **Refresh**, or when they come back to it after half an hour away. A screen left on in the trailer keeps the day it opened on; tap **Refresh** each morning.
- *Ten links per project.* A project can have at most 10 active links, crew links and planner views together.

- *One itinerary per person.* A person has one itinerary link at a time, and retiring them from the roster turns it off for good.
- *A connection is needed.* Every crew page says so at its foot; the printed sheet is the backup. See [Run the day from the handout or the Day plan](#).
- *People with accounts.* A Field account signed in to Gantry sees more than a crew link: the [Work page](#), with task notes. The Share dialog's **People** section says so.

Book people day by day

Book people onto tasks a day at a time, book a saved crew in one move, keep a foreman on a project between tasks, clear double bookings and publish.

By the end of this workflow the right people are booked on the right days, your foreman stays on the project between tasks, nobody is booked twice, and crews see the plan.

Who does this

Project managers, superintendents and schedulers. The company-wide [People](#) page is for company admins and anyone given [master planning](#); an Editor without it books one project at a time with **Book people** (not offered on a student's copy or a class board in [Training](#)), and someone with master planning publishes. Field accounts don't book. See [Who can see and do what](#).

Before you start

- The project's tasks are dated and each task's **Crew** names the trades it needs (see [Plan crews and equipment for the weeks ahead](#)).
 - Your people are on the company roster on [Roster & equipment](#), each with a trade.
 - To book a crew in one move, a company admin or someone with master planning has made a [saved crew](#) on the **Saved crews** tab of Roster & equipment, with the tab's **Add crew** button (**+**).
-

Steps

Book a person for a few days

- 1 *Open People.* Choose **People** in the sidebar and pick **1 wk**, or choose **Book people** on the project's [Crew planning](#) page, which opens that project across its whole span.
 - 2 *Find what's short.* **OPEN WORK** along the top lists the tasks still short of people, such as **1 Laborer unfilled**. At **1 wk** on the company page, each trade's head shows the day's need, how many are booked and how many are free, such as **7 need · 3 booked · 196 free**; wider, or for one project, it shows the need alone. Under it, **NO CREW** lists the tasks with no crew line yet: open one and, in its pane, **Add a trade or person...** adds a trade to its crew, or books a person from today on.
-

- 3 *Book a day.* Click the person's day. Under **Open this day · Laborer**, point at the task, choose **This day** or **Through the task's end** in the foot, then click the task or press Enter. People books only the days the line is short, and names any day already full, such as **Thu Oct 8 – Fri Oct 9 already full**.
-
- 4 *Or drag.* Drag an **OPEN WORK** task onto the person's day, drag along their row for a range of days, or drag a bar's end to add or free days. From a task's pane, **+ Assign person** books the short days each person you pick is free.
-

Book a saved crew

- 5 *Show the crews.* Set **Sections: Trade ▾** to **Crew**. Each crew heads its people, foreman first.
-
- 6 *Open the crew dialog.* Choose **Book crew...** on the crew's head (on the company page, then pick the project), or drag the crew's **⋮** grip onto a project's **OPEN WORK** day.
-
- 7 *Check and book.* Set **From** and **Through:** **End of this window** (not in a whole project or one project), **End of the project** or **A date...**. Tick **Luis Ortega (foreman) stays through the end of the project** to keep the foreman there. **What this books** and **Left over** show exactly what will happen; press the button, such as **Book 5 people**. Each person takes the first open line of their trade, one task a day, skipping days they are away or already booked.
-

Keep someone on the project between tasks

- 8 *Book through the end.* Open their day, pick a task under **Open this day · Laborer**, and choose **Through the end of the project** in the foot. It books a task a day on their free days to the project's end, and makes a stay.
-
- 9 *Watch the gaps.* A band along their row reads **through Fri Oct 23**, and a **no task** box marks each working day with nothing for them. In the pane, **No task** lists those days, and **New in a stay** lists a new task short of their trade, with **Book Luis Ortega** and **Fill from Ortega crew...**.
-
- 10 *End it when they leave.* Select the person and, under **On a stay**, choose **End stay...**, then **End stay** to confirm. A stay starting today or later is removed; an earlier one ends yesterday. Their bookings don't change.
-

Fix a double booking

- 11 *Find it.* Red marks a person booked twice on one day; the pane's **Double-booked** list names each one, and a click brings the row into view. Someone booked on an empty row of a project is booked on no day there, so a booking like that is never a double booking.
 - 12 *Take one off.* Click that day and press **Remove this day** on the task they shouldn't be on, or drag the bar onto someone else to hand it over.
 - 13 *Avoid it next time.* When you book someone who holds another project's task on those days, keep the foot's default, **Move off Set fence posts on these days**, to free them there in the same step. People only moves someone off a project you can edit.
-

Publish so crews see it

- 14 *Publish a Draft.* A booking never publishes. On a **Draft** project the first booking says **Bridge 12 is a Draft – crews see it after you publish.** Press **Publish...** on People and publish in **Publish to crews** (see [Publish the plan crews see](#)). A Live project's crews see each booking once it saves.
 - 15 *Hand out paper.* **Print ▾** prints the week or a day; a company admin can print **Itineraries for the people shown...**: one PDF with a week's itinerary for each person shown, up to 50. See [Send crews their links and itineraries](#).
-

Good to know

- *One step back.* Every gesture is one step: **Undo** on People's action row, or Ctrl/Cmd+Z, takes it back, however many projects it touched.
- *Dates never move.* Booking never changes a task's dates. If a task moves later, a People booking keeps its days and reads **• not on this task's days**.
- *Teammates.* Their bookings show within 30 seconds, on the project open in the editor too. If the editor holds nothing unsaved, it takes their save. If it holds unsaved changes, People shows that project as they saved it, says **Kim Walsh saved Bridge 12 – shown here, not yet in your editor; yours will need a review on save** and lists the project under **Needs attention** as **Another version saved**. Your own unsaved changes to it stay in the editor, hidden on People until the review, and still count when People checks for a double booking. **Review** there, or the editor's next save, opens the review of what differs. Undo leaves what they changed since, and says so.

- *Stays need no publish.* A stay reaches the person's Day plan and itinerary at once: on a day with no task they see `On Bridge 12 · no task` and the site address. See Stays.
- *Whole tasks elsewhere.* The editor's **Crew & equipment...** and the Work page's **+ Assign person** book a person for the whole task. To change their days, use **Change days on People →** in the Work page's task details.
- *On a phone,* People shows one day at a time: tap a person, pick a task and press **Book**. Each trade's head shows that day's need, booked and free, such as `2 need · 1 booked · 0 free`, red when even everyone free falls short.

Run the day from the handout or the Day plan

Start each day from the Day plan on a tablet or phone, or from the printed crew handout, and print your own week or the master sheet.

By the end of this workflow the foreman knows what every crew is doing today, on which project, with whom, and has it on paper for when the signal drops.

Who does this

- *Foremen and crew leads with a Field account use the [Day plan](#).*
- *Crew members with only a link use their [crew link](#) or itinerary, and the [handout](#) printed from it.*
- *Project managers use the Day plan too, and print the handouts and the master sheet for the crews.*

See [Who can see and do what](#).

Before you start

- You can sign in to Gantry, or someone has sent you a crew link or an itinerary (see [Send crews their links and itineraries](#)).
 - The plan is published, if the project is in [Draft](#). The Day plan and every crew link show the plan crews were given, not a planner's work in progress (see [Publish the plan crews see](#)).
-

Steps

On a tablet

- 1 *Open the Day plan.* On **My tasks** (see [Work, My tasks and Calendar](#)), press **Day plan**, or **Day plan** → under the TODAY card, which previews today and the Day plan's next day. It shows your work day by day on every project you are on; a task you are booked on for only some of its days shows on those days alone. On a tablet it opens on the whole week.
 - 2 *Choose whose work.* **Mine** shows your own tasks. **Everyone** shows every task on the projects you have work on that day, with a *You* pill on yours.
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- 3 *Read the day.* Each project's day lists its tasks with their crews, equipment and tools, and its **ON SITE** notes: the notes the office ticked for crews. A task's crew line names the people booked that day. **Day** narrows it to one day; the arrows and **Today** move through the week.

 - 4 *Get the latest.* The Day plan doesn't update on its own. Press **Refresh** to read the plan again, for example after the office calls to say they have published a change.

 - 5 *Print your week.* **Print my week** makes a PDF of your own week, the days with a crew note included, as the Day plan shows them.
-

On a phone

- 6 The same Day plan opens on one day at a time, with a strip of the week's days to jump between. Everything else works the same.
-

From a crew link and its handout

- 7 *Open the link.* A crew link opens on today, in the same layout: the week strip, **Today**, **Day** and **Week**, and **Refresh**.

 - 8 *Print the crew handout.* At the foot of the crew link, press **Print crew handout**. It prints the week on screen, cut to what the link shows, each task with the people booked that day and its tools. When the week has more than one trade, choose **Whole crew** or one trade before printing, for example *Laborer only*. An itinerary link prints the person's week with **Print itinerary**.
-

For the office: the master sheet

- 9 A planner with master planning prints the projects open in the master plan, the ones the Group filter shows: **Print ▼** there offers every week the window touches, a day sheet for today and one for the day after, and **Choose days....** The week sheet lists projects against Monday to Sunday with the names on each day, and shows a person booked on two projects that day in amber; a day sheet lists each project's work, crew, equipment, that day's tools and day notes. When a project is in Draft, choose **What crews see** or **Latest plan (Draft)**.

 - 10 People has the same **Print ▼** menu, its sheets titled *People*; its day sheets cover the projects with a named booking that day. Company admins also get **Itineraries for the people shown....**: a week's sheet for each person, in one PDF.
-

Good to know

- *Every printed page* carries the header, the date and time it was printed, and the footer *The plan may have changed since this was printed.*, with page numbers. Each project on it names its site address, or says *Site address not entered*.
- *A Draft project*. The Day plan shows crews the published plan. A planner looking at it sees one extra line under that project: crews see the plan published at a given time, and the planner's latest saves are not in it.
- *Days off*. A weekend or other non-working day with no work is skipped, unless a note is dated that day; then it opens like any other day, with its note.
- *Kept on a project*. When a planner keeps you on a project between tasks (a stay, made on People), on a working day with no task for you anywhere your Day plan and itinerary show that project, its address and a line such as *On Bridge 12 · no task*, on screen and on paper. A stay reaches you without a publish.
- *A connection is needed*. Every field page says *Needs a connection — the printed sheet is your backup*. Print the week before you head to a site with no signal. If the signal stalls, the Day plan stops waiting after 30 seconds, keeps what it showed, and says it could not refresh.
- *Reporting progress*. To mark tasks done from the site, see [Report progress from a phone or tablet](#).

Report progress from a phone or tablet

From a phone or tablet, find your tasks in My tasks, then record status, percent complete, remaining days, checklist ticks and links from the site.

By the end of this workflow the office sees, as soon as you save it, what got done on site today: which tasks started, how far along they are, what is blocked.

Who does this

Foremen and crew leads with a **Field** account, and any Editor or Admin working from the site. A Field account reports progress but never changes the schedule itself. See [Who can see and do what](#).

Before you start

- You have a Gantry account and you are assigned to tasks (see [Your account](#)). A crew member with only a link can see the plan but not report progress.
 - *Put Gantry on your home screen.* On a phone or tablet, the work pages offer to install Gantry as an app. On Android it installs like any app; on an iPhone or iPad the pages show how to add it to the Home Screen (see [On phones and tablets](#)). The installed app opens on **My tasks** (see [Work, My tasks and Calendar](#)).
-

Steps

On a tablet

- 1 *Open My tasks.* A Field account lands there when it signs in. It lists your assignments across every project you can see. Group them by **Project** or **Due date**, filter with **Status ▼**, and press **Hide done** to clear finished work away.
 - 2 *Check today and tomorrow.* The TODAY card at the top of the side pane previews your [Day plan](#): for today and the next day (on a Friday, usually Monday), each project you work, its notes for crews and the tasks you are booked on, with that day's crew and equipment. Tap a task to open it; **Day plan →** opens the whole plan.
 - 3 *Open a task.* Tap it. Its project's Work page opens with the task selected and its details in the side pane.
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- 4 *Set the status.* Under **Status**, choose **To do**, **In progress**, **Blocked** or **Done**. **Done** sets 100%. Starting a task stamps its actual start with today's date.

 - 5 *Enter the numbers.* Type % **complete**, and **Remaining (days)** if you know how much is left.

 - 6 *Tick the checklist and add links.* Tick items under **Checklist** as they are done. To attach a photo album, a drawing or a report, paste its link, give it a **Label (optional)**, and press **Add**.

 - 7 *Or work the whole project.* The project's **Work** tab shows every task, grouped by phase. **Table** and **Board** switch views; on the board, drag a card to another status column. **Mine** shows only your tasks.
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On a phone

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- 8 The same pages, one hand: the bar at the bottom of the screen switches between **My tasks**, **Work** and **Calendar**. A task opens as a sheet from the bottom. The board shows one status column at a time with the next peeking in; swipe between them, or use a card's **:** menu to change its status without dragging.
-

Good to know

- *Saves go straight in.* Each change saves on its own, and every open copy of the page updates. On a project in Draft, your progress still reaches the plan crews see at once.
- *Who's on the task.* A task with crew or equipment shows a **Resources** section with who is filling each line, counted by the day: someone booked on only some of the task's days carries a chip naming those days. A Field account sees it read-only; an Editor or Admin can assign people and machines from there for the whole task, and **Change days on People** → opens People to book by the day (not on a student's copy or a class board in Training).
- *Tools.* Under Resources, **Tools needed** lists what the crew should bring. A Field account reads it; an Editor or Admin adds and removes tools there.
- *Old dates.* My tasks and Calendar read a list the app refreshes as projects are opened and saved. A project nobody has opened since its last save shows an *Old dates* hint rather than stale dates; tap it to read why.
- *No signal.* If the connection stalls, My tasks, the Calendar and the Day plan stop waiting after 30 seconds and say they couldn't load, rather than spin. Try again when you have a signal.
- *The calendar.* **Calendar** lays your projects on a month or week grid; on a phone it becomes a day-by-day list.

- *Printing.* Work and My tasks have no print layout. Calendar has no Print button, but it prints cleanly with your browser's print command, and the [Day plan](#) prints your week (see [Run the day from the handout or the Day plan](#)).
- *What a Field account can't do.* It can't open the editor, [Projects](#), [Reports](#), [People](#) or [Roster & equipment](#), and it never sees costs.

Set up your company

A new company admin's first hour, in order: groups, the logo and default colors, calendar standards, project types and templates, and company columns.

By the end of this workflow your company's projects start the same way: in the right group, on your working calendar, from your templates, with your logo on the paper.

Who does this

A company Admin. Partner staff can do it for the companies their partner looks after. See [Who can see and do what](#).

Before you start

- You are signed in as an Admin of the company. **Company** is in your sidebar, under **Administration** (see [the Company page](#)).
- Have your logo as an image file, your standard work weeks and holidays, and one finished project you would like new ones to start from.

Steps

- 1 *Open Company.* Choose **Company** in the sidebar. The page shows one section at a time, as tabs: **Overview**, **Users & access**, **Organization**, **Standards**, **Billing & licenses**, **Integrations** and **Activity**, plus **Training** once you turn training on.
 - 2 *Add your groups, if you need them.* Groups keep projects apart, for example by region or division. In **Organization**, under **Groups**, press **+ Add group...** and type a name. Every project lives in the company itself or in exactly one group, and who sees it follows from that (see [Companies, groups and roles](#)). A single-office company can skip groups.
 - 3 *Add your logo and colors.* Open **Standards**. Under **Company defaults**, press **Upload logo...**; the logo appears on PDF exports and the company header. Under **Default colors**, name and add the [color tags](#) your planners should use, such as *Concrete* or *Sub: electrical*.
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- 4 *Set your work calendars.* Under **Calendar standards**, press **Add the two calendar standards** to add *5×8 Mon–Fri*, set as the default, and *4×10 Mon–Thu*. To keep a calendar you already built, holidays and shutdowns included, open a project that has it, choose **Tools ▾ → Calendars...**, open the calendar and press **Save as a calendar standard....** On the **New calendar standard** screen keep the **Repeats every year** entries and choose which **Specific dates** to keep. **Manage...** lets you edit, **Set as default** or **Retire** a standard. See [Company calendar standards](#).
-
- 5 *Make your project templates.* Under **Project types and project templates**, press **Manage...** and add the types you build, for example *Bridge* or *Site work*. Then open a finished project of that type and choose **Tools ▾ → Save as a project template....** The capture screen shows what it keeps, under **Kept**, and what it clears for the next project, under **Cleared for a fresh start**. Tick the task notes worth keeping, pick the type, and tick the box to make it that type's default. See [Project types and templates](#).
-
- 6 *Add company columns.* Under **Company columns**, press **Add the Supplies column** for a text column crews read on site, or **Manage...** to define your own: a name and a type (text, checkbox, dropdown list or symbols). Planners then add them to any project from the column header's **Add or show columns...**, under **Add from company library**. See [Company columns](#).
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- 7 *Invite your people.* Continue with [Invite people, set roles and manage licenses](#).
-

Good to know

- *Changing a standard never changes a saved project.* A project copies a calendar standard, a template or a company column when it is created, and keeps its copy. Editing or retiring the standard later changes only what new projects get.
- *Adopting a standard later.* A project that started on another calendar can switch in Project settings, with **Apply company defaults**. It replaces the project's holidays and shutdowns after a confirmation that says how many tasks will move, and one Ctrl+Z undoes it.
- *What a new project gets.* Company settings are applied first, then the template, then anything the planner types in the **New project** dialog, which lists what it will apply.
- *Who can do what.* Editors can add a calendar standard, a project template or a company column too. Managing calendar standards and templates, such as renaming, retiring or setting a default, is for Admins only.
- *Limits.* Up to 50 calendar standards, 100 project types, 200 templates of up to 2,000 tasks each, 100 company columns and 20 default colors.
- *Next steps.* Connect other software in **Integrations** (see [Connect other tools with webhooks and the API](#)), and run classes from **Training** (see [Run a training course](#)).

Invite people, set roles and manage licenses

Invite people, set their roles and groups, grant master planning, help with passwords, correct names and emails, disable or remove accounts, and buy licenses.

By the end of this workflow everyone who needs Gantry has an account with the right role in the right places, and your company has the [licenses](#) to cover them.

Who does this

A company Admin, or partner staff for the companies their partner looks after. Partner staff add licenses from the [partner dashboard](#) rather than with step 12 (see [Look after your clients' companies](#)). See [Who can see and do what](#).

Before you start

- Know each person's email and what they will do: plan (Editor), run the company (Admin), or report from the field (Field).
 - If you use groups, create them first (see [Set up your company](#)).
 - Every active account uses a [license](#), and so does an invitation still waiting. Check you have room under **Billing & licenses**.
-

Steps

Invite someone

- 1 *Open Users & access.* Choose **Company** in the sidebar (see [the Company page](#)), then **Users & access**.
 - 2 *Fill in the form under the Users list.* Type the **Name** and **Email**. Leave **Password** blank so Gantry makes an [invitation link](#) instead. Pick the **Role: Editor, Admin** or **Field**.
 - 3 *Choose where they belong.* Under **Member of**, the company is ticked; tick groups as well, or instead. At least one must be ticked.
 - 4 *Send the link.* Press **Add user**. The **Invite link** dialog shows the link: press **Copy** and send it by text, chat or email. It works once, for 7 days. When Gantry can send email, the invitation also goes out by email and the dialog says so.
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- 5 *Follow up.* Until they set a password, their row carries an **invited** badge. **Re-invite** makes a fresh link, and **Remove** cancels the invitation. Your account shows what they see when they open the link.
-

Change roles and grant master planning

- 6 *Roles per place.* The **Memberships** card lists each person against the company and each group. Pick **Editor**, **Admin**, **Field** or **No membership** in a cell; it saves at once. Company access doesn't include the company's groups.
- 7 *Master planning.* In the **Master planning** card, tick a person to let them publish the plan to crews, restore an earlier version of a Live project, open the master plan and People, and manage saved crews. It takes effect at once. Company Admins already have it and show ticked, *by role*. A group Admin is ticked like anyone else; Field-only accounts can't have it. See Publish the plan crews see.
-

Help with passwords, names and emails

- 8 *Forgotten password.* On the person's row, **Reset link...** makes a link that works for one hour, for you to send; **Set new password...** sets one directly and signs them out everywhere.
- 9 *Wrong name or email.* **Edit...** corrects either at once, with no confirmation step. The old address gets a notice. For someone still invited, a new email cancels the link already sent, so use **Re-invite** afterwards. People change their own name and email from Profile; see Your account.
-

Disable or remove someone

- 10 *Disable.* **Disable account** asks first, then signs them out everywhere; they can't sign in until you press **Enable account**. Their license is free at once.
- 11 *Remove.* **Remove** takes away their access to this company and its groups; their projects stay. If this company was all they had, their account is deleted.
-

Buy and manage licenses

- 12 Open **Billing & licenses**. The **License** card shows how many licenses are in use out of how many, and the billing status. **Buy licenses...** starts your first purchase, choosing the number and a monthly or yearly plan, and **Continue to Stripe** finishes payment on Stripe's secure page. Once you have a subscription, **Manage billing...** opens Stripe's billing page to change the number of licenses or the card, or to cancel. Changes there come back to Ganttry by themselves.
-

Good to know

- *At the limit.* When every license is in use, adding, inviting or re-enabling someone is refused with a message that says so. Disabling or removing someone frees a license straight away.
- *If a payment is missed,* everyone keeps working; after 14 days of grace only adding people is blocked until it is paid.
- *Partner companies.* If a partner manages your licenses, the License card says so and names them; ask them for more.
- *Some rows have fewer buttons.* For someone who also has access outside your company, such as partner staff, only **Remove** shows; the rest is for the Ganttry instance admin.
- *Training accounts.* Class accounts made for a [training](#) course are listed apart, under a collapsed list of generic students (see [Run a training course](#)).
- *Cancelling your subscription* and what happens to the company's data afterwards is explained in [Licenses and billing](#).

Run a training course

Turn training on, build a course from a template project, give each student a copy, follow their work and check it against an answer key, then reset, archive or delete it.

By the end of this workflow each student in your class has their own copy of a practice project to schedule in, the whole class shares one board, and you can see how close each student's work is to your answer key.

Who does this

A company Admin, or partner staff for the companies their partner looks after. Editors and Field accounts can't open [Training](#). See [Who can see and do what](#).

Before you start

- *The template.* A project in your company that each student gets a copy of: the exercise.
- *The answer key, if you want the check.* Build it from the template, with **Make a copy...** on the template and then complete the copy. The check matches tasks by the identity they were copied with, so a key built separately scores every student 0%. The key has to exist before you create the course: it can't be added later.
- *Licenses.* Each new student account uses a license, the same as any other account. If they don't all fit, the course isn't created.

Steps

- 1 *Turn training on.* On the [Company page](#), open **Organization**. The **Training** card explains what training adds; press **Enable training**. A **Training** tab appears after **Activity**.
 - 2 *Create the course.* In **Training**, press **+ New course...** Fill in the **Name**, pick the **Template** and, optionally, the **Answer key**. Set **New students** to the number of new accounts to make, and give them a **Class password** of at least 8 characters. To bring back students from an earlier course, tick them under **Re-use existing students**. Press **Create**.
 - 3 *Hand out the copies.* Gantry asks whether to hand out copies to every student now. Choose OK and the course page opens with a copy for each student, plus the shared class board. If you choose Cancel, press **Hand out copies** on the course page when you are ready.
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- 4 *Give out the sign-ins.* New students are accounts named *Student 01*, *Student 02* and so on, numbered on from the highest student account your company still has, all with the class password. Their sign-in emails are under **Users & access**, in the collapsed list of generic students in the **Users** card; the course page doesn't show them. Students sign in on the ordinary sign-in page and find a notification that their workspace is ready.
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- 5 *Follow the class.* The course page lists each student with their copy, **Progress** (percent complete reported), **Schedule checks** (the [schedule quality score](#)) and **Check** (the share of the answer key's tasks the student has exactly right). Hover the check to see up to five tasks that differ. Click a student's copy to open it in the editor.
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- 6 *Teach from the class board.* **Open class board** opens the project the whole class shares. Choose **Tools ▾ → Present to everyone viewing...** and the students' screens follow your scrolling and zoom (see [Getting around](#)).
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- 7 *Start an exercise again.* **Reset all...**, or **Reset...** on one student, replaces the copy with a fresh copy of the template as it is now. It asks first: the copy as it stands isn't saved first, though its saved versions and automatic saves already in [History](#) stay.
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- 8 *Between courses.* **Change student passwords...** in the Training section sets a new password for the students you tick and signs them out everywhere.
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- 9 *Archive the course.* **Archive...** asks first. Students can still report progress in the [Work view](#), but can no longer change their copies in the Schedule view, and the copies are hidden from [Projects](#) and [Home](#). Accounts and saved work are kept. **Unarchive** puts everything back.
-
- 10 *Delete the course.* **Delete course...** asks first, then deletes every student copy, the class board, and the student accounts that belong to nothing else. It can't be undone. The template and the answer key stay.
-

Good to know

- *A course is fixed once created.* Its name, template, answer key and students can't change, and no control adds or removes a student. For a different class list, create a new course; it can re-use existing student accounts.
- *Handing out again only fills gaps.* **Hand out copies** gives a copy to any student who has none, and never updates an existing copy. Use reset for that. Reset leaves the class board alone.
- *What students see.* Only their own copy and the class board. They edit their copy, but can't delete it, share it, publish it or present on the class board.

- *Forgotten passwords.* A student account has no mailbox, so students can't reset their own password. Use **Set new password...** on their row in **Users & access**, or **Change student passwords....**
- *Names.* **Rename...** beside a student changes the name shown in this course only. An Admin can change the account's name with **Edit...** in **Users & access**; its email never changes.
- *Turning training off.* **Disable training** asks first and deletes nothing. The courses can't be managed until training is back on, but students keep signing in and working in their copies.
- *Template and key while the course exists.* Only an Admin can share them or preview their [crew links](#), and nobody can [publish](#) them. If the template is deleted, the course can no longer hand out or reset copies; create a new course from another template.

Connect other tools with webhooks and the API

For your company's developer, set up the webhook that tells another system when a project changes, check each delivery's signature, and make read-only API tokens.

By the end of this workflow another system, such as a reporting dashboard or your accounting software, hears from Gantry when a project is saved, published or finished, and can read your projects with a token.

Who does this

A company Admin sets it up on the [Company page](#), usually with the developer who will write the receiving side. This page is written for that developer too, and [Integrations: webhooks and the read-only API](#) documents every field, event and limit. See [Who can see and do what](#).

Before you start

- The receiving system has a public web address that accepts **POST** requests. Gantry refuses private and local network addresses, and doesn't follow redirects, so use the receiver's final URL.
- A company has one webhook URL, and all four events go to it, so if several systems need them, have that one receiver pass them on.
- Decide where you will keep the signing secret and any API tokens. Gantry shows each one once.

Steps

Set up the webhook

- 1 *Open Integrations.* Choose **Company** in the sidebar, then **Integrations**. The **Webhooks** tile works today; the other named tools are marked **Coming soon**.
 - 2 *Configure it.* Press **Configure...** on the **Webhooks** tile. In **Webhook settings**, enter the **Webhook URL**, tick **Deliver events** and press **Save**.
 - 3 *Store the secret.* The first time you turn delivery on, Gantry makes a signing secret and shows it once, in **Webhook signing secret**. Copy it into your receiver's settings now.
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- 4 *Handle the events.* Gantry sends a JSON body shaped `{ id, type, createdAt, companyId, data }` for four events:
- `schedule.saved` : a project was saved, at most once a minute per project;
 - `schedule.status_changed` : its lifecycle status changed;
 - `schedule.published` : a plan was published to crews;
 - `task.completed` : tasks were marked done, one event per save listing them.
-
- 5 *Verify every delivery.* Each request carries `X-Gantry-Signature: t=<unix time>,v1=<hex>`, where `v1` is HMAC-SHA256 of `<t>.<raw body>` with your secret. It is the same scheme Stripe uses, so any Stripe webhook-verification code works. Reject a request whose signature doesn't match.
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Make an API token

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- 6 Under the tiles, press **+ New token...** and name it after what will use it, for example *Power BI*. **API token created** shows the token, starting `gtk_`, once. Store it now.
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- 7 Send it with every request as `Authorization: Bearer gtk_...`. Three read-only endpoints answer:
- `GET /api/v1/schedules` : the company's projects, with name, status, start date and task count;
 - `GET /api/v1/schedules/:id` : one project, with its whole schedule;
 - `GET /api/v1/schedules/:id/tasks` : one row per task, with dates, percent complete, status, crew and assignees.
-
- 8 *Retire a token.* **Revoke** on its row stops it at once, after a confirmation. Revoke any token whose system you no longer use.
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Good to know

- *Treat events as hints.* Delivery is best effort: a failed delivery is retried once after 30 seconds, then dropped. Read the API for the facts.
- *Tokens belong to the company*, not to a person, so staff changes never break an integration. A company holds up to 10.
- *Read only.* The API answers only `GET` requests and is rate-limited. An unknown or revoked token gets a `404`, so the API never confirms whether a token exists.

- *Drafts.* The API always returns the project as last saved, even while it is in Draft; each response says whether the project is held and which version was published.
- *A screen in the site trailer* needs no token: open a whole-project crew link on it (see Send crews their links and itineraries).
- *A new secret.* **Replace signing secret** in **Webhook settings** makes a new one and saves the settings. Update your receiver straight away.

Look after your clients' companies

For partner staff, create client companies, start trials, add and cancel licenses, follow invoices, and step into each client's Company page to run it.

By the end of this workflow your client has a working Gantry company with the licenses it needs, and you know what your next invoice will be.

Who does this

Partner staff: people at a partner firm that resells Gantry and runs it for its clients. Partner staff have a company Admin's full powers in every company their partner looks after, and use no license anywhere. See Who can see and do what.

Before you start

- Gantry has set up your partner firm and linked your account to it as partner staff.
- Have the client's company name, and how many people will use Gantry there.

Steps

- 1 *Open the partner dashboard.* If you belong to no company yourself, you land on it when you sign in. Otherwise open your avatar menu and choose the *Partner dashboard — your partner's name...* item.
 - 2 *Read the summary.* **Billing summary** shows your **Rate** per license per month, your **Paid licenses** and **Trial licenses**, the **Current cycle** and the **Next invoice (estimate)**. **Next invoice (live estimate)** lists what that invoice will hold, company by company.
 - 3 *Create the client's company.* Under **Companies**, press **+ New company...** and type its name.
 - 4 *Start a trial, if they want one.* For a new company with no licenses, **Start 14-day trial...** asks how many licenses to give. It is free for 14 days; after that, the company needs paid licenses before anyone new can be added or re-enabled.
 - 5 *Convert or add licenses.* **Convert to paid...** turns a trial into paid licenses; billing starts that day, prorated on your next invoice. For a paid company, **Add licenses...** adds more. They work at once, and your next invoice includes the days left in the current billing period.
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- 6 Set the company up. **Manage...** on the company's row opens its [Company page](#), where you have an Admin's full powers. Add its groups, standards and people as in [Set up your company](#) and [Invite people, set roles and manage licenses](#).
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- 7 Cancel licenses the client no longer needs. **Cancel licenses...** asks how many. Cancelled licenses stay active until the end of the current billing period, then end.
-
- 8 Follow the invoices. **Invoices** lists each invoice with its service period, amount and whether it is paid. **Partner staff** lists who at your firm has access.
-

Good to know

- *Monthly cycles.* Billing runs on monthly cycles from your partner start date. At each rollover the invoice freezes: one prorated line for each license added during the cycle, plus every company's licenses for the cycle ahead. You pay Gantry directly by invoice, never through Stripe.
- *Unpaid invoices.* An unpaid invoice puts your partner account past due. Fourteen days after the invoice was issued you can't add licenses until it is settled. Your clients' companies keep working either way.
- *Licenses stay put.* Licenses never move between your companies; add and cancel them company by company.
- *What your client sees.* A partner-managed company never sees Stripe. Its License card says its licensing is managed by your firm and to contact you for more.
- *Everything inside the company.* As partner staff you see every project in each client company and can do anything a company Admin can do there.

Companies, groups and roles

How a company, its groups and each person's role decide which projects everyone sees, edits and can delete.

Gantry organizes people and projects by company, and a company can be split into groups — regions or divisions. Every project lives in exactly one company or group, and a person's role in each one decides what they see, what they can change and what they can delete. Gantry enforces it for every request: a project outside your companies and groups isn't hidden behind a grayed-out button, it simply isn't there for you.

Where to find it

A company admin manages all of this on the Company page: **Company** in the sidebar, then the **Users & access** section for people and roles and the **Organization** section for groups. Everyone else sees the result — the projects they can open on Projects, and the company and group headings on Home.

Companies and groups

A company is the top level: its people, its projects, its licenses and its settings. Groups are optional divisions inside it — use them to keep projects apart by region or division.

- **Organization > Groups** lists each group with how many projects it holds, and **Rename...** and **Delete** beside it. **+ Add group...** asks for a name (for example a region).
- A group that still holds projects can't be deleted — move or delete its projects first. Deleting an empty group asks first, and its members lose that membership.
- With no groups yet, the card reads "No groups yet. Use groups to keep projects separate for regions or divisions."

When you belong to more than one company or group, the **New project** dialog shows a **Company or group** row so you pick where the new project lives; importing a file asks the same question its own way. Both start on the company the scope control at the top shows, never on one where your role is Field, and **Make a copy...** starts on the company or group of the project it copies when that one is in its list. Home groups its rows under company and group headings, and a project's ⋮ menu on Home has **Move to group...** where you may move it (see Moving a project to another group).

Moving a project to another group

File ▾ → Project settings... has a **Group** row. Pick another group of the same company, or **No group** for the company level. Gantry asks first — "Move this project to North? Who can open it changes with

its group." — and moves it at once; it isn't part of the dialog's **Save**. The line under the row then reads **Moved to North.**, or says why the move was refused. With the keyboard, the arrow keys move through the groups without asking; the question comes when you leave the list or press Enter. After a move the row is read again: where you can no longer move the project, it shows the new group as text. **Move to group...** in a project's ⋯ menu on Home opens the same row in a small dialog; it's offered only on projects you have the right to delete.

- You need the right to delete the project (a company admin, or an admin of its group) and an Admin or Editor role in the group it goes to. The list only offers groups you may move it to.
- Where you can't move it, the row shows the group's name as plain text, and the Home dialog reads "This project can't be moved to another group."
- Training course projects never move, and nothing moves into a course group.
- People in the group it left and in the group it joined both see the move in their activity feed.

Roles

Each membership carries one of three roles: **Admin**, **Editor** or **Field**. Roles are *per membership* — the same person can be an Admin of one group and an Editor in another. What each combination opens:

You are...	You see and edit	You can delete
Editor in a group	that group's projects	—
Admin of a group	that group's projects	that group's projects
Editor in the company	the company-level projects, <i>not</i> its groups'	—
Field in the company or a group	its projects, read-only plus progress reporting, with costs hidden	—
Admin of the company	the company-level projects and every group's, plus groups, users and memberships	anything in the company
Partner staff	every project in every company their partner looks after, with company-admin powers there	anything in those companies

Any Editor or Admin can create, edit and archive projects where they have that role. Delete only shows where you have the right to use it. Company access does *not* include the company's groups: a group's projects are opened by that group's members and by company admins. Publishing the plan crews see, restoring an earlier version of a Live project and opening the Master plan need the Master planning capability, which company admins hold by role and others are granted — Who can see and do what has the full picture, and the partner program covers partner staff.

Setting roles

On **Users & access**, the **Memberships** matrix lists each person down the side and the company and its groups across the top. Each cell is a menu: **No membership**, **Editor**, **Admin** or **Field**. A change saves as soon as you pick it.

- A new person gets their first memberships when you add them (the **Member of** boxes on the **Users** card — see [Invitations and password resets](#)).
- Removing all of a person's company and group access deletes their account. Their projects stay with the company or group; their sessions, saved views, PDF presets, preferences and any unused invite or reset links go with the account. Partner staff keep their accounts.
- Every person with at least one membership, unless disabled, uses one [license](#) — see [Licenses and billing](#).

Profile pictures

Everyone gets a profile picture: a colored circle with their initials, with nothing to set up, or a photo they upload from **Profile...** in the avatar menu (see [Your account](#)). Pictures show at the right end of the top row and in the Company page's **Users** table. A picture is only ever shown to people who share a company with its owner, and to the instance admin.

Presence

Open projects show who else is there right now.

- An avatar stack in the top row shows who else is viewing the same project (a count on phones), and the status line announces people joining and leaving.
- Each viewer's selection shows live in the grid, in their own color: an outline on their active cell with a brief name flag, and tinted row numbers on the rows they have selected.
- A pencil dot on someone's avatar means they have unsaved edits in flight.
- When a teammate saves, everyone without unsaved work of their own picks up the new plan at once — the changed cells flash in that person's color, and the status line says "Updated by" and their name. Anyone with unsaved work keeps it and is warned that a review is coming; the usual conflict review follows (see [Saving and history](#)).
- While History, **Save a version...**, or anything opened from History (**Look**, **Compare with now** or a restore) is open, a teammate's save waits and lands when you close the last of them.
- The Projects page shows a live "N viewing" badge on any project someone has open; hover it for the names.

Presence follows the same rules as the project itself — you only ever see the people who can open it. For training sessions and meetings, **Present to everyone viewing...** lets one person lead everyone's screen; see [Getting around](#).

Who can use it

Everyone signed in to a company sees the projects their memberships allow. Groups, users and memberships are managed by a company **Admin** (and by partner staff for the companies their partner looks after). A group's own Admin can delete that group's projects but does not manage people. See [Who can see and do what](#).

Good to know

- Your own name and email are yours to change in **Profile...** — see [Your account](#).
- For someone who also has access outside your company, the Company page hides the actions that reach beyond it (editing their name or email, their password, disabling, re-inviting). **Remove** still works: it only takes away their access to your company.
- Names on past records — who saved a version, a roster entry, the activity feed — keep the name they had at the time.
- A browser-only session of Gantry (the demo, or local projects) has no companies, groups or presence.

The Company page

The Company page, where a company admin runs the company, one section at a time, from users and standards to billing and training.

The Company page is where a company admin runs the company: its people and roles, its groups, the standards new projects start from, billing and licenses, integrations, the activity feed and training. It shows one section at a time; each section is summed up here with a link to the page that explains it in full.

Where to find it

Open **Company** in the sidebar (under Administration). The scope control's menu also carries a *Manage* entry for each company you administer. The page head reads **Company**, with the company's name and "company administration" under it, and a **Refresh** button. Partner staff open a client company's Company page from **Manage...** on their [partner dashboard](#).

The sections run as tabs under the page head. On a narrow window — below 900 pixels wide, or beside the pinned sidebar up to 1,175 — they become a **Section** menu instead. Each section has its own page address, so the browser's Back button walks through them and you can send a link to another admin. Moving between sections keeps your place: focus, scroll and filters are where you left them.

The sections

Overview

- **Projects** — every project in the company with its status, task count, last update and a **Schedule checks** score (the share of the [schedule quality checks](#) that pass, worked out after the page opens), plus **Open**, which opens it in the editor, and **History...**, which opens it with its [History](#). Training course projects are left out and counted in one line.
- **Roster & equipment** — a link to the Roster & equipment page, where the company's roster and fleet live. See [The Roster & equipment page](#).

Users & access

- **Users** — everyone with access, with their role, an *invited* or *disabled* badge, and when they were last seen; the add-user form sits below. See [Invitations and password resets](#).
- **Master planning** — who may publish the plan crews see, restore an earlier version of a Live project, and open the Master plan and People. Company admins have it by role; tick any other

Editor or Admin. See [Who can see and do what](#).

- **Memberships** — the matrix of people against the company and its groups, with a role in each cell. See [Companies, groups and roles](#).

Organization

- **Groups** — add, rename and delete groups. See [Companies, groups and roles](#).
- **Training** — while training is off, its card sits here with **Enable training**. See [Training](#).

Standards

- **Company defaults** — the company's logo, default colors and default print layout (below).
- **Calendar standards** — the work calendars new projects start from. See [Company calendar standards](#).
- **Project types and project templates** — the starting points for new projects. See [Project types and templates](#).
- **Company columns** — the company's own columns in every project's grid. See [Company columns](#).

Billing & licenses

- **License** — how many licenses are in use against the limit, the billing status, the renewal date, and **Buy licenses...** or **Manage billing...** See [Licenses and billing](#).

Integrations

- **Integrations** — the company's webhook and its read-only API tokens. See [Integrations: webhooks and the read-only API](#).

Activity

- **Recent activity** — a feed of saves and admin actions, newest first. Saving, changing and deleting a saved version show in it too, under **Everything**, and every restore from History adds two rows, `restored project` and `restored version`, which **Projects** shows. See [Security and sign-in](#).

Training

- **Training** — the company's courses, while training is on. This tab appears only after **Enable training**. See [Training](#).

Company defaults

The **Company defaults** card on **Standards** holds three things every project can draw on.

- **Logo** — **Upload logo...** (PNG, JPEG or WebP), then **Change logo...** or **Remove**. It appears on PDF exports and the company header.
 - **Default colors** — named colors (up to 20) added with **+ Add color....** A new project starts with them, and **Apply company defaults** in an existing project's settings adds any that are missing and updates the color of any it shares a name with.
 - **Print preset** — a default print layout for PDF exports. Set one from **Export ▾ → PDF... → Set as company default...;** **Clear** removes it.
-

Several companies

If you are an **Admin** of more than one company, a **Company** menu in the page head switches between them and keeps the section you are on. Opening Company with no company chosen shows *Your companies*: one small card per company, each with **Manage....**

Who can use it

A company **Admin** — an Admin of the company itself, not of one of its groups — and partner staff, for the companies their partner looks after. Editors, **Field** users and group admins don't see the **Company** row in the sidebar, and a link to the page shows "Company isn't available". A field-only account lands on **My tasks** instead. See [Who can see and do what](#).

Good to know

- Each section loads on its own. If one fails to load, it says so with **Retry**, in that section only.
- If Gantry refuses a change, the reason shows beside the control you used, with **Reload section**. Reloading never sends the change again — make it again from the same control.
- A company you may not see and one that doesn't exist get the same answer: "Company isn't available".
- The **Schedule checks** score on the Overview is worked out for the 15 most recently updated projects that aren't archived; the others, and every archived project, show "—" (open the project and run its quality checks instead).

Company calendar standards

Calendar standards are the company's own work calendars, which new projects copy and existing projects can adopt.

A calendar standard is one of your company's own work calendars — its working week, hours per day, annual holidays and yearly shutdowns — kept once so every new project starts from the same pattern. The card says it plainly: "Work calendars a new project can start from. Changing one here never changes a saved project."

Where to find it

On the [Company](#) page, open **Standards**: the **Calendar standards** card lists up to three active standards — each with its name, a **Default** tag on the default one, and a count of its holidays and shutdowns — and "+N more" when there are others. **Manage...** opens the **Calendar standards** dialog with the full list.

What a standard holds

A standard is a whole [working calendar](#): which weekdays are worked, hours per day, and its non-working days. How project calendars behave in the schedule is explained in [Scheduling](#).

A new project copies the company's **Default** standard when it is created — unless it starts from a [project template](#) that brings its own calendar. The copy is a one-time snapshot: the project keeps no link to the standard it came from, so editing or retiring the standard later never touches a project that already exists.

Adding standards

- *Start with two.* A company with no standards yet sees **Add the two calendar standards**, which adds **5×8 Mon–Fri** (set as the default) and **4×10 Mon–Thu**. Edit or retire them afterwards.
- *Capture one from a project.* In a project's calendar editor (**Tools ▾** → **Calendars...**, then open a calendar), **Save as a calendar standard...** opens the **New calendar standard** screen. Name it (1 to 60 characters), tick what to keep, and **Save**; the project you captured it from doesn't change.
- *Add one by name.* A company admin can also type a name in the **Calendar standards** dialog, press **Add**, and then **Edit...** the new standard.

The **New calendar standard** screen sorts the calendar's entries into two lists, so the company keeps only its standing pattern and not that project's own dates:

- **Repeats every year** — annual holidays and recurring shutdowns, ticked to begin with;
 - **Specific dates** — one-off holidays and working exceptions, unticked to begin with, with **Select all** and **Clear**. Tick one only if the company really repeats it.
-

Managing standards

The **Calendar standards** dialog lists every standard, active ones first. On an active one: **Edit...** (opens the calendar editor on the standard itself), **Set as default** and **Retire**. A retired standard shows **Restore**. Editing or retiring a standard never changes a project that already used it. The default can't be retired — set another standard as the default first.

Adopting a standard in an existing project

An existing project can take on the company's default standard from its Project settings. The **Apply company defaults** row says what differs — for example *Calendar differs from* the default's name — and its **Apply...** button opens a confirmation that names what will change: how many tasks will move, and whether hours per day changes (durations entered in hours are then recalculated). The same confirmation can add or update the company's default colors, and set the company name.

Adopting is a whole-calendar *replace*, never a merge. The project's holidays, working exceptions and shutdown periods are replaced by the standard's; the project's other calendars are not changed; and it is one undo step. When nothing differs, the row reads "Already up to date."

Who can use it

- Anyone with an **Editor** or **Admin** role can add a standard, including capturing one from a project.
- Managing standards — editing, setting the default, retiring and restoring — is for company admins.

See [Who can see and do what](#).

Good to know

- A company can keep up to 50 calendar standards, retired ones included. Past that, adding one is refused: "The calendar standard list is full (50)".
- Names are 1 to 60 characters, and a name that matches an active one apart from capitals or spacing is refused: "That calendar standard is already on the list".
- **Save as a calendar standard...** is not offered on the calendars step of the **New project** dialog — create the project first.

Project types and templates

Project templates capture a finished project's structure so new projects start from it, and project types sort the templates.

A [project template](#) is a reusable starting point: a project's structure — its tasks, durations, links and calendars — with everything that belonged to that one project cleared away. A [project type](#) groups templates, and each type can name a default template that a new project of that type is offered first.

Where to find it

- To make a template, open the project you want to reuse: **Save as a project template...** is the last item of **Tools ▾**'s *This project* group, and also an item in a project's ⋮ menu on Home (after **Make a copy...**, before **Archive**).
 - To manage types and templates, open the [Company page](#) > **Standards**. The **Project types and project templates** card reads "Types group your project templates. A new project offers the type's default project template first." It lists the most recently updated types with how many active templates each has; **Manage...** opens the full list.
 - To use one, start a new project — see [Creating a project](#).
-

Saving a project as a template

Save as a project template... opens the **New project template** screen: a **Name** (1 to 60 characters), a **Project type**, and five lists. **Kept** and **Cleared for a fresh start** start collapsed and sum up what a template takes and what it leaves behind. **Fixed dates** and **Dated calendar entries** open by themselves when this project has constraints, deadlines or dated calendar entries that won't carry over (otherwise they read "None in this project."). **Task notes** is where you tick the notes to keep (none are ticked at first; **Select all** and **Clear** help).

A template keeps the task hierarchy and levels, durations and work hours, predecessors and successors, milestones, the calendars' working weeks with their annual holidays and recurring shutdowns, crew and equipment demand, column definitions, splits and formatting, and the task notes you tick.

It clears everything that belonged to this project: the data date, baselines, update snapshots, the contract ledger, progress and actual dates, assignees, crew and equipment fills, attached files, checklists, share links, the import source, constraints and deadlines, and the calendars' dated holidays and working exceptions.

A company admin saving a template can also tick *Set as the default for the chosen type*. The project you saved from doesn't change.

Project types

In the **Project types and project templates** dialog, each type is a heading with its templates under it:

- **Default template** picks the template a new project of that type is offered first.
 - **Rename...** and **Retire** act on the type; a retired type shows **Restore**.
 - Each template row shows **Retire** (or **Restore** once retired).
 - Templates saved with no type sit in a **No project type** list, where each one can be moved to a type.
 - The add row at the foot creates a new type.
-

Starting a project from a template

When you create a project from a template, everything is re-dated from the start date you type. Company defaults fill in first, then the template, then anything you changed by hand. The new project is its own: renaming, editing or retiring the template later never touches a project already made from it.

Who can use it

- Anyone with an **Editor** or **Admin** role can save a project as a template.
- Managing types and templates — renaming, retiring, restoring, choosing defaults — is for company admins.
- A **Field** account never sees a template's contents.

See [Who can see and do what](#).

Good to know

- A company can keep up to 100 project types ("The project type list is full (100)") and 200 project templates ("The project template list is full (200)"), retired ones included. A template holds up to 2,000 tasks.
- Type names and template names must be unique: a name that matches an active one apart from capitals or spacing is refused — for a type, "That project type is already on the list"; for a template, a message that the name already exists.

- Training course projects can't be saved as templates.
- A calendar standard sets the working calendar for projects that don't bring their own — see [Company calendar standards](#).

The Roster & equipment page

The Roster & equipment page is the company's roster of people and fleet of machines, with its saved crews and the trade and machine type catalogs behind them.

The Roster & equipment page is the company's roster: everyone and everything it can put on a project. **People** are the crew you schedule, each with a trade; **Equipment** is the fleet — machines with a unit number and a [machine type](#). The page also keeps the company's *trade* and *machine type* catalogs, the words everyone picks from when they plan crews and equipment, and its saved crews.

Where to find it

Roster & equipment in the sidebar, the first row under Resources (until 1.12.0 the page was called People & equipment; its address is the same). Company admins and people with the **Master planning** capability also see a **People** row at the end of that group, a different page: [People](#) is where you book these people on tasks. For them, the page head carries **People** →, which opens it. The Company page's **Overview** also carries a **Roster & equipment** card: "People, trades, machine types and units are managed on the Roster & equipment page." with **Open Roster & equipment**, and a reminder worth reading first — "Renaming a trade there can also update the people that carry the old name."

How these fit together

The three pages under Resources follow the order a team works in:

- 1 **Roster & equipment** sets up the list: who and what your company has, the people with their trades and the machines with their types.
 - 2 **Crew planning** plans the counts: how many of each trade one project needs, per day, against how many you have.
 - 3 **People** books the names: it puts named people from the list on tasks, day by day, across projects.
-

Crew planning counts trades (how many carpenters); People books names (which carpenter).

The four tabs

Tabs under the page head switch the list; the arrow keys, Home and End move between them.

- **People** — name, trade, group, source, status, and whether the person is linked to a login.
- **Equipment** — unit number, machine type, group, owned or rented, status, and the date a machine is down until.
- **Saved crews** — the company's named crews; see [Saved crews](#) below.
- **Itinerary links** (company admins only) — every active itinerary link, one row per person. Select a row and the pane shows that person's itinerary. See [Crew links and itineraries](#).

Each tab keeps its own actions. People has **Add**, **Export CSV**, **Manage (Catalogs... and Seed roster from accounts...)**, **Paste list...**, **Import file...**, **Print** and **Refresh**; Equipment has the same, with **Manage** offering **Catalogs...** only; Saved crews has **Filter crews** and, for those who manage crews, a + button, **Add crew**; Itinerary links has just **Print** and **Refresh**. **Add**, **Manage**, **Paste list...** and **Import file...** show for company admins only. **Export CSV** and the printed stamp follow the tab on screen.

Sorting and organizing the lists

- *Sort.* Double-click a column header to sort by it; double-click again for Z–A, and a third time for the original order. On a touch screen a single tap sorts. Enter or Space on a header sorts too. Right-click or long-press a header for its two directions, such as **Sort A–Z** and **Sort Z–A**, and **Original order**. Your sort is saved to your account and follows you to other devices.
- *Organize.* **Organize ▼**, beside **Group** and **Show**, picks the headings the list is split under. On People: **None**, **Group**, **Trade**, **Source** or **Status**. On Equipment: **None**, **Group**, **Type**, **Owned** or **Status**. **Group** is where it starts. Each heading shows its count, and the blank one, such as **No trade** or **Unassigned**, comes last. Inside a heading, retired rows sit at the bottom. **Export CSV** follows what is on screen. The choice lasts while the browser tab is open.
- *From a menu.* The last item in **Organize ▼** lists **Original order** and each column's two directions, named for what the column holds: **Trade, A–Z**, **Source, employees first**, **Status, active first** or **Down until, earliest first**. It is the same sort as the headers. On a phone, where the column headers are hidden, the ⋮ menu carries the **Group**, **Show** and **Organize** choices and **Sort by....** On a narrower laptop or tablet window with no room for **Organize ▼**, the ⋮ menu appears and carries them too.

People are not logins

The roster is not your list of users. On the People tab a company admin reads so beside the actions: "People here are the crew you schedule. Adding someone does not give them a login — invite users in Company > Users & access." Adding a roster entry never creates an account and never uses a license. A name becomes a login only when an admin links it to an invited account, and retiring someone from

the roster never touches their account. To give someone a login, invite them — see [Invitations and password resets](#).

Adding people and machines

- Add rows one at a time, or **Paste list...** — names or unit numbers, one per line — or bring in a payroll or fleet file with **Import file...** (see [Import your roster or fleet from a file](#)).
 - **Manage > Seed roster from accounts...** turns your existing users into roster people in one pass.
 - Typing a trade or machine type that is already in the catalog links the person or machine to it, with the catalog's spelling. A word that matches nothing — or only a retired entry — stays as plain text.
 - The fleet is equipment with a unit number that you send to projects, not the tool crib. The tools a crew should bring are a list on each task — see [Equipment on tasks](#).
-

Import your roster or fleet from a file

Import file..., beside **Paste list...** on the People and Equipment tabs (in the ⋮ menu on a phone or a narrow window), brings the roster or the fleet in line with a payroll or HR export, or a fleet list. Company admins only.

The file never leaves your browser. The dialog says so: "The file stays on this device. Only the columns you map are sent." Gantry reads the file on your device, sends only the columns you map, stores no copy, and drops the file's cells when the dialog closes.

- 1 *Choose the kind and the file.* **People** or **Equipment** (the dialog starts on the tab you came from), then a CSV or Excel (`.xlsx`) file of up to 10 MB and 2,000 rows. Save an old `.xls` workbook as `.xlsx` or CSV first. Any other kind of file is refused: "This isn't a CSV or Excel file. Choose a .csv or .xlsx file."
 - 2 *Check the sheet and header row.* Gantry finds the header row itself — by the names it knows, by the headers you mapped before, or as a row of text above columns of values — and never offers a workbook's hidden sheets; if it can't, it starts on **No header row** (every row is read as data) and you can pick the **Sheet** and **Header row**. A workbook that unpacks to more than 100 MB is refused: save just the roster columns as CSV or `.xlsx`.
-

3 *Map the columns.* Each field offers the file's columns, with a sample value, or **Ignore**. People need an `Employee #` or a `Name` column (or `First name` and `Last name`); machines need a `Unit #` column. A column is matched for you only when its whole header is a name Gantry knows for that field, such as `Employee ID` or `Last Name`; the rest start on **Ignore** ("Columns we didn't recognise start on Ignore — pick any you want to import."). Sensitive columns, such as an SSN, pay, bank details, an address or a date of birth, are never matched for you, and their samples read `(hidden)`. Leave them on Ignore: a row with a Social Security number in a mapped column is refused. Your mapping is remembered for next time (the header names only), and so is a column you set to **Ignore** that Gantry would have matched. Notes keep their line breaks, and a date that doesn't exist is refused on its row.

4 *Decide what happens to records not in the file:* **Retire them** or **Leave them as they are**.

5 *Check the import.* **Check import** shows what would change, without changing anything yet:

- `New`, `Updated` (each change, such as `Trade: Laborer → Operator`), `Restored` (`Back from Retired`) and `Unchanged`;
- `Errors` and `Ambiguous`: these rows are skipped, and nothing is merged. Two people with the same name and no employee number are Ambiguous, and so is a unit number that two machines share;
- `Skipped`, in grey: a row marked Retired for someone who isn't on the roster. It isn't an error; nothing is added. Skipped rows stay counted in the summary;
- `Not in the file`, split into still booked and not booked. Retired people and machines keep their place on saved plans. A retired person's itinerary link turns off; tick **Keep** to leave anyone active.

6 *Apply.* **Apply import** writes the changes and shows what it did, for example `Imported · 1 new · 30 updated · 2 restored · 4 retired`. If someone changed the roster since your preview, nothing is written and you check again. If you change the file or a column while a check runs, that check is dropped: Apply only sends the rows its preview came from.

A file where nothing matches retires no one. When no row is new, updated, restored or unchanged — a wrong file, say — **Retire them** does nothing, and the preview says "Nothing in this file matched; no one will be retired."

How rows are matched:

- People match on the employee number first, then on a name that only one person on the roster has. A row with a number that belongs to a retired person restores them.

- Machines match on the unit number. Case and extra spaces don't matter; leading zeros do, so `012` is not `12`. A row whose number belongs only to a retired machine offers to restore it, or **Add as a new machine instead**.
- New trades and machine types are kept as text and named in the preview.
- *Rented machines*. If the file has no Owned/Rented column, rented machines are left alone: they are never retired for being missing from the file. If it has one, the file is taken to be your whole fleet, rentals included.

A partial file. When an import would retire more than a quarter of your active people (or machines), for example because the file is one crew's sheet, the button reads `Retire 41 people and import` and takes a second press. Gantry asks: "This import retires 41 people, more than a quarter of your active people. Press Retire 41 people and import again to confirm."

Undo. After an import, **Undo import** puts back what it changed. It stays on offer until you reload the page, and the dialog shows your last import when you open it again. Undo never overwrites an edit made after the import: a record changed since is skipped and named. It also never turns itinerary links back on, and it says only what it did: "People the import added are retired." when the import added people, "People the import retired are back, with their itinerary links still off." when it retired some.

Employee

A person's **Employee #** is in their pane and in **Export CSV**, for company admins only; nobody else sees it. It is how an import recognises a person, so a name change in payroll doesn't create a second person.

- Plain letters (A–Z), digits, spaces and keyboard symbols like `-` `/` `.`, up to 40 characters.
- Unique in the company, retired people included, and compared without regard to case. Leading zeros count: `00123` is not `123`. A number already in use is refused by name: "Employee number 00123 is already on Rosa Diaz".
- If that person is retired, the message ends "(retired) — Restore them instead". Someone coming back is restored, not added again.

Fixing duplicate unit numbers

Two active machines can't share a unit number. Adding a machine, renaming one with **Unit #** in its pane, restoring one, or a row of **Paste list...** that uses a number an active machine already has is refused: "Unit 412 is already in the fleet (Excavator, North Yard)". Case and extra spaces don't make a number different. A retired machine's number is free to use again.

Paste list... used to add a machine with a number already in the fleet and warn you; it now skips that row.

Machines that already shared a number before this rule are kept as they are. On the Equipment tab a company admin reads, for example, `2 unit numbers are used by more than one machine · Show`. To fix them:

- 1 Press **Show**. The list shows only the machines that share a number.
- 2 Select one of each pair. Give it its own number in **Unit #**, or retire it.
- 3 When no number is shared, the notice goes away. **Show all** brings back the whole list in the meantime.

Until a shared number is fixed, an import skips it as Ambiguous.

Trades and machine types

Manage > Catalogs... keeps the company's trade and machine type lists. While the company's trade list is still empty, **Seed trades...** (beside the trade box in the People add row, or inside **Catalogs...**) starts it from the words already used in the open project plus a starter list.

Renaming a trade or machine type. Renaming a catalog word never rewrites a saved project — the crew and equipment text stored in projects stays as it was. The rename row carries an unticked checkbox that counts what it would touch, for example *Also update 3 people to "Concrete Finisher"* (or "Also update the people on this trade" / "Also update the machines of this type" when the list is too long to count). Tick it to rename the roster or fleet rows too; the change is recorded in the company's activity. The checkbox disappears when nothing carries the old name.

Groups, status and source

- **Group: All ▾** (beside **Show ▾**) sorts and filters both lists by group, with Unassigned always last. A group here is a label for planning, not a permission: it never limits who can see or use a person or machine. In the pickers elsewhere in the app your own group is listed first, and other groups fold under *Other groups*.
- Any Editor or Admin can flip a machine to **Down** and back — a mechanic on the ground knows before the office does.
- Only company admins change a person's status (**Active**, **Away**, **Retired**) or source (**Employee**, **Sub**, **Temp**).

Saved crews

A saved crew is a named group of people, usually a foreman and the people who work with them, kept so you can book them together on [People](#). The tab says what a crew is and isn't: "A saved crew is a shortcut for booking people together. Projects keep the people, not the crew — renaming or retiring a crew changes no project."

- The list's columns are [Crew](#), [Foreman](#), [People](#) (the foreman counts), [Trades](#) and [Booked now](#), which names the project a crew is staying on, for example [Bridge 12 from Sep 28](#). Retired crews fold under [Retired crews · 2](#).
- Select a crew and its pane renames it, sets its foreman and adds or removes members, with **Retire crew...** (**Restore crew** once it is retired). Retiring asks first and changes nothing on any schedule.
- Company admins and people with the **Master planning** capability manage crews; everyone else who can open the page reads them.

Where people and machines are committed

Select a row and the pane shows *Committed to* the project you have open: the tasks in that one project where the person or machine is planned. A booking for only some of a task's days lists its own days and how many of the task's days it books, for example [Mon Sep 28 – Tue Sep 29 · 2d](#), or [· not on this task's days](#) once the task has moved away from them. For the picture across every project, **Where are they?** (or **Where is it?** for a machine) jumps to their row on the Reports page's resource assignments board — see [Crew and equipment reports](#). To plan crews and equipment on tasks, see [Crew planning](#) and [Equipment on tasks](#).

Who can use it

- Everyone signed in to a company can open the page and read its lists, except a field-only account or a training student.
- Anyone can **Export CSV** what they can see; phone and notes export blank for non-admins.
- Company admins add, paste, import, seed and retire rows, see and set employee numbers, keep the catalogs, and change a person's status or source.
- Company admins and people with the **Master planning** capability manage saved crews.
- Itinerary links are for company admins.

See [Who can see and do what](#).

Good to know

- The page needs a Gantry account — it isn't part of the browser-only demo.
- A **Field** account doesn't reach this page in this release.

Integrations: webhooks and the read-only API

For your developer, Gantry's outbound webhook and read-only API tokens, with events, envelope, signature, endpoints, limits and how to keep them secure.

Gantry connects to your other systems two ways: an outbound *webhook* that tells your system when something happens, and read-only *API tokens* that let your system read the company's projects whenever it likes. This page is written for the developer who builds the receiving side. Other named integrations appear on the card as *Coming soon*.

Where to find it

A company admin opens the [Company page](#) > **Integrations**. The **Integrations** card has a **Webhooks** tile (showing **Enabled** or **Off**, with **Configure...**) and, below it, the company's API tokens with **+** **New token....**

Outbound webhooks

Each company has one webhook: one payload URL. **Configure...** opens **Webhook settings**, with the **Webhook URL**, a **Deliver events** checkbox and **Save**. Gantry sends each event to that URL as an HTTP **POST** with a JSON body (`content-type: application/json`).

- *Use a public address.* The URL must start with `http://` or `https://` and reach a *public* address. Private and local network addresses are refused when you save: "Enter a public webhook URL. This one points to a private or local network address."
- *Give the final URL.* Redirects are not followed — a `3xx` answer counts as a failed delivery. Enter the receiver's own address, not one that forwards to it.
- *Answer with a `2xx` status* to acknowledge a delivery.

The events

Event	When it is sent
<code>schedule.saved</code>	a project was saved — at most one delivery per minute per project, carrying the latest save
<code>schedule.status_changed</code>	a project's status changed
<code>schedule.published</code>	a plan was published to crews; a notes-only publish repeats <code>publishedRev</code> with a new <code>publishedAt</code>
<code>task.completed</code>	one event per save, listing the tasks that crossed into Done

The event names are the API's own and keep the word *schedule*; in the app, each one is a project.

The envelope

Every delivery has the same outer shape:

- `id` — the event's own id;
- `type` — one of the four event names above;
- `createdAt` — when the event happened, as an ISO timestamp;
- `companyId` — your company;
- `data` — the event's details.

Delivery

Delivery is best-effort. A failed delivery is retried once, 30 seconds later, and then the event is dropped. There is no queue to replay and no promise of order between events. Treat each event as a *hint* that something changed, and read the API (below) for the truth.

Read-only API tokens

A token lets a system read the company's projects with plain `GET` requests.

- **+ New token...** asks for a name (what will use it — for example *Power BI*), then shows the token once, in the **API token created** dialog. It starts with `gtk_`.
- A company can have up to 10 active tokens: "This company has 10 active API tokens. Revoke a token you no longer use before creating another."
- A token belongs to the *company*, not to the person who made it, so people joining or leaving never breaks an integration.

- The token list shows each token's name, when it was created, who created it and when it was last used, with **Revoke**.

Send the token in the `Authorization` header: `Authorization: Bearer gtk_...`.

The endpoints

Request	Returns
<code>GET /api/v1/schedules</code>	the company's projects: id, name, status, start date, task count, rev, archived, <code>updatedAt</code> and <code>updatedBy</code>
<code>GET /api/v1/schedules/:id</code>	the same details plus the project's full <code>document</code>
<code>GET /api/v1/schedules/:id/tasks</code>	one row per task: uid, name, start and finish, percent complete, work status, <code>isSummary</code> and its level, color tag, work hours, crew, equipment and assignees

The task rows come from a cache that is refreshed on each save. They include summary rows (unlike the app's own views), and a `stale` flag set to `true` when the dates may trail the project by a save.

Draft and Publish

The API keeps answering while a project is held in Draft, and says so: each project in a response carries `publicationHold` and `publishedRev`, so your system can tell a held project from a live one. The API always returns the *live* project, not the plan last published to crews — see [Draft and Publish](#).

For a screen in the field — a trailer TV or a kiosk tablet — you don't need a token: open a whole-project crew link on it instead ([Crew links and itineraries](#)). A crew link obeys the Draft hold the way a crew's own view does. The API has no link endpoint.

Limits and refusals

- Requests are rate-limited per IP address. A request over the limit gets `429` with a `Retry-After` header.
- Anything that isn't a `GET` is refused.
- An unknown or revoked token reads as `404`, the same as a wrong path — the API never confirms whether a token exists.

Keeping it secure

- *Check the signature on every delivery.* Each delivery carries `X-Gantttry-Signature: t=<unix time>,v1=<hex>`, where `v1` is the HMAC-SHA256 of `<t>.<raw body>` keyed with your signing

secret. This is Stripe's signature scheme, so any Stripe webhook-verification snippet works unchanged. Reject a delivery whose signature doesn't match.

- *Keep the signing secret and every token in a password manager.* Gantry shows each one *once* — the signing secret when the webhook is first enabled (or when you press **Replace signing secret**), a token when it is created — and never again. Gantry stores only a fingerprint of a token, so a lost token can't be shown again: revoke it and make a new one.
- *A token reads everything.* Every token reads every project in the company in full, costs included, whatever the role of the person who created it. Give one only to a system that should see all of that.
- *Revoke a token the moment its system is retired.* **Revoke** asks first — "Anything using it stops working immediately." — and it stops at once.
- *Replacing the signing secret* takes effect as you save: update the receiving system to the new secret straight away.

Who can use it

Only a company **Admin** (and partner staff, for the companies their partner looks after) opens **Integrations**, sets the webhook and creates or revokes tokens. See [Who can see and do what](#).

Good to know

- Turning **Deliver events** off also cancels anything still waiting to be sent.
- The step-by-step version is [Connect other tools](#).

Licenses and billing

Who uses a license, how a company buys and manages licenses through Stripe, trials, a late payment, and what happens after a cancellation.

Each person who signs in to your company uses one [license](#). A company's *license limit* is its paid licenses plus any free ones it has been given. Company admins watch the count and buy or change licenses on the Company page; Stripe handles every payment.

Where to find it

[Company page](#) > **Billing & licenses**. The **License** card shows how many licenses are in use against the limit, a billing status (**Trial**, **Active**, **Past due**, **Canceled** or **No subscription**), the renewal date, any licenses given free of charge, and **Buy licenses...** or **Manage billing...** For the plans and prices, see [Pricing](#).

Who uses a license

- Every person who isn't disabled and has at least one membership in the company or its groups uses one license — counted once, however many groups they belong to.
- A pending invitation holds a license until it is accepted or removed.
- Partner staff use no license, anywhere. See [The partner program](#).
- Training's student accounts use licenses like anyone else. See [Training](#).
- Adding a person to the roster on Roster & equipment never uses a license — the roster is not a list of logins.

When every license is in use, adding, inviting or re-enabling a person is refused with the reason, for example "All 5 licenses are in use (5 of 5). Disable or remove a user to free one, or add licenses to the plan." Disabling or removing someone frees their license at once.

Buying and managing licenses

- **Buy licenses...** (a company's first purchase) asks how many licenses and which plan — monthly or annual — then **Continue to Stripe** finishes payment on Stripe's secure checkout page.
- **Manage billing...** (once the company has a subscription) opens Stripe's billing portal in a new tab: change the number of licenses, update the card, or cancel. Changes made there come back to Gantry by themselves.

- Card numbers never touch Gantry — Stripe hosts every payment page.
-

Trials

A company bought on the [Pricing](#) page starts with a 14-day free trial: its licenses are set, and its first admin gets an invitation by email. A card is collected up front and the subscription converts to paid when the trial ends — cancel before then and you owe nothing.

A late payment

If a payment fails, everyone keeps working while it is retried. After a 14-day grace period, adding people is blocked until the payment is settled — the card says "Payment is past due — after a 14-day grace period, adding users is blocked until payment is settled." Gantry never locks existing users out over a payment problem.

After a cancellation

You cancel from **Manage billing...**, and access continues through the period you have paid for. The [Terms](#) put what happens next this way: "After cancellation your schedules remain available for 60 days so you can take copies, then they are deleted, together with the plan last published to crews and every view-only and crew link to them; itinerary links end when your company's account is deleted."

- The company keeps its data for *at least 60 days* after the cancellation.
- Its admins get a reminder by email a week before the deletion date, telling them to export anything they need now.
- *To keep the company*, an admin replies to the reminder, and the deletion is put on hold. A new checkout on the website doesn't bring it back — it starts a separate, empty company.
- On the deletion date the company, its projects and its training courses are deleted; itinerary links end with it.

Read the [Terms](#) for the full wording.

Companies a partner looks after

When a partner looks after your company, the partner handles licensing: the **License** card says "Licensing is managed by" the partner's name, "— contact them to add licenses.", and shows no Stripe buttons. See [The partner program](#).

Who can use it

Company admins see **Billing & licenses** and buy or manage licenses. Anyone who signs in uses a license, except partner staff. See [Who can see and do what](#).

Good to know

- A company with no licenses at all can't add people until licenses are bought or granted: "This company has no licenses yet. Buy some under Company > Billing & licenses → Buy licenses..., or ask the instance admin for free ones."
- The **License** card also shows how much space the company's attached files take.

The partner program

The partner program lets a reseller run client companies on Ganttry, with partner staff, a partner dashboard and monthly invoiced billing.

A [partner](#) is a reseller that runs its clients' companies on Ganttry. The partner's staff look after those companies with full company-admin powers, and the partner buys licenses for them on one monthly invoice, paid to Ganttry directly. To become a partner, see [the partner program](#) on the Ganttry site.

Where to find it

Partner staff open the partner dashboard from the avatar menu: *Partner dashboard*, followed by the partner's name. The page head reads "Partner — " followed by the partner's name, with "<partner name> · partner administration" under it.

Partners and partner staff

Ganttry sets up each partner by hand: the partner itself, its per-license monthly rate (a named tier or a rate of its own) and the staff accounts linked to it.

- Partner staff get full admin access to every company the partner owns — the same powers as a company Admin. They open each client company's Company page from the dashboard's **Manage....**
 - Partner staff use no license, in any company, and hold no memberships.
-

The partner dashboard

The dashboard has five cards.

- **Billing summary** — the partner's status, its rate per license per month, paid licenses (and how many end this cycle), trial licenses, the current billing cycle, and an estimate of the next invoice.
- **Next invoice (live estimate)** — the lines the next invoice will carry so far, company by company, with a total.
- **Companies** — each client company with its licenses in use, its status and its actions (below). **+ New company...** creates a company.
- **Invoices** — each invoice with its date, service period, amount and whether it is paid.
- **Partner staff** — the people linked to the partner.

Licenses for a client company

- **Add licenses...** — the licenses start now, and the next invoice includes the days left in the current billing period.
- **Cancel licenses...** — the licenses you cancel stay active until the current billing period ends, then they end.
- **Start 14-day trial...** — offered for a brand-new company with no licenses. It's free for 14 days; after that, the company must switch to paid licenses before adding or re-enabling user accounts.
- **Convert to paid...** — turns a trial's licenses into paid licenses; billing starts that day and is prorated on the next invoice.

Licenses never move between a partner's companies: add and remove them company by company. A client company's admins see "Licensing is managed by" the partner's name on their **License** card, and no Stripe buttons — see [Licenses and billing](#).

Billing

- Billing runs on monthly cycles that start on the partner's start date.
- At the end of each cycle an invoice is fixed: one prorated line for each license added during the cycle, plus each company's licenses for the cycle ahead. The dashboard always shows a live estimate of the next one.
- Partners pay Ganttry directly — by ACH, on an invoice, never through Stripe. Ganttry marks an invoice paid when it arrives.
- An unpaid invoice turns the partner's status to past due: "An invoice is unpaid. You can't add licenses once it has been unpaid for 14 days from its issue date." New licenses are blocked until it's settled — the companies already working are never locked out.

Who can use it

Partner staff open the partner dashboard, and the Company page of each company their partner owns. Company users inside a client company work as usual; their roles are set by the company's admins or by partner staff. See [Who can see and do what](#).

Good to know

- A partner-billed company never touches Stripe, and a company billed through Stripe can't be attached to a partner — the two ways of paying never mix.
- When a trial ends without converting, the company's admins are told "The free trial for this company has ended — ask your partner to convert it to paid licenses." when they try to add

someone.

- The step-by-step version is [Look after your clients' companies.](#)

Invitations and password resets

How a company admin invites people with a link instead of a password, and how invite and reset links, forgotten passwords and admin resets work.

You never have to type a password for anyone. A company admin adds a person with the password left blank, and Gantry makes a single-use *invite link*; the person opens it, sets their own password, and lands signed in. The same kind of link resets a forgotten password.

Where to find it

[Company page](#) > **Users & access** > the **Users** card. The add-user form sits under the table of users, and each person's row carries its own actions.

Inviting someone

- 1 Fill in **Name** and **Email**, leave **Password** blank ("leave blank to create an invite link"), and pick a **Role: Editor, Admin** or **Field**.
- 2 Under **Member of**, tick the company, one or more groups, or both. The company is ticked to begin with. With nothing ticked, the form says "Tick the company or at least one group under Member of."
- 3 Press **Add user**. The **Invite link** dialog shows the link with **Copy**. When Gantry has emailed the link too, it says "Invite email sent."; either way you can copy the link and send it over Teams, a text or any other way.

The link works for 7 days and only once. The person who opens it sees "Welcome," and their name, sets a password of at least 8 characters, and presses **Set password & sign in**. [Your account](#) covers their first day.

Until they accept, the row shows an **invited** badge with **Re-invite** (a fresh link), **Edit...** (correct the name or email; changing the email cancels the link already sent, so use **Re-invite** afterwards) and **Remove**. A pending invitation holds a [license](#).

If you type a password instead of leaving it blank, the account is created with that password (at least 8 characters) and no link — give it to the person yourself.

Resetting a password

- **Forgot password?** on the sign-in page asks for an email address and sends a reset link to it: "If an account uses that email, we sent a password reset link. Check your inbox and spam folder." It answers the same way whether or not the address has an account.
- **Reset link...** on a person's row makes a reset link that works for 1 hour. The **Password reset link** dialog shows it to copy, and says when Gantry has also emailed it.
- **Set new password...** on a person's row sets their password directly (at least 8 characters). It signs them out on all their devices and cancels their invite and reset links.

How links behave

- Every invite and reset link works once and then expires — an invite after 7 days, a reset link after 1 hour.
- Setting a password — from a link, from an admin's **Set new password...**, or with **Change password...** — cancels every other link still outstanding for that account.
- Setting a password from a link also signs the account out everywhere else, then signs the person in fresh.
- A link that has expired or was already used opens "We couldn't open this link." with **Go to sign-in**; ask for a new one.
- A link pasted into a chat app stays in that chat's history. Its short life and single use are the safety net, so send it to the person directly.

Other actions on a person's row

For an active user: **Edit...** (correct their name or email; the old address gets a notice), **Set new password...**, **Reset link...**, **Disable account** (it asks first, and signs them out everywhere — see [Security and sign-in](#)) or **Enable account**, and **Remove** (it asks first; their projects stay with the company, and their account is deleted if they have no other company or group access). People can change their own name and email in **Profile...** — see [Your account](#).

Who can use it

Company admins, and partner staff for the companies their partner looks after. For someone who also has access outside your company, only **Remove** shows. See [Who can see and do what](#).

Good to know

- An invitation is refused when every license is in use — see [Licenses and billing](#).
- Training's student accounts can't receive email, so a forgotten student password is set by the trainer — see [Training](#).
- The step-by-step version is [Invite people, set roles and manage licenses](#).

Security and sign-in

What protects your account and your company in Ganttry, from wrong-password lockouts and sign-in lifetimes to the activity feed and disabling a user.

Ganttry protects each account against password guessing, ends sign-ins that are old or left unused, keeps every company's projects to that company's own people, and gives company admins a record of what happened and a way to shut an account off at once.

Where to find it

The sign-in protections work on their own, for everyone. Company admins find the company's record on the [Company page](#) > **Activity**, and each person's account actions on **Users & access**.

Wrong passwords

After five wrong passwords in a row, the account is locked for 30 seconds. After that, each further wrong password locks it again, for twice as long each time, up to 15 minutes. A successful sign-in clears it. While it is locked, sign-in says "Too many attempts — try again in a moment". A wrong *current* password in **Change password...** counts the same way.

Ganttry answers an unknown email address exactly as it answers a known one, so nobody can use the sign-in page — or **Forgot password?** — to find out whether an account exists.

How long a sign-in lasts

A sign-in lasts 30 days at most, and ends sooner if the device goes two weeks without using Ganttry. So a device you use every day stays signed in for the full 30 days, while a tablet left in a drawer asks for the password again after two weeks.

- **Sign out** in the avatar menu ends the sign-in on that device.
- Setting a new password from an invite or reset link signs the account out everywhere else.
- A company admin's **Set new password...** or **Disable account** signs the person out on all their devices.
- **Change password...** keeps you signed in and cancels any invite or reset links still outstanding for you.

Your company's projects stay yours

Every request is checked against the person's memberships. A project outside your companies and groups doesn't show as a locked item — for you, it isn't there at all. The roles and what each one opens are on [Companies, groups and roles](#); profile pictures are shown only to people who share a company with their owner, and to the instance admin.

Recent activity

Company admins see the company's record on the [Company page](#) > **Activity** > **Recent activity**: saves and admin actions in one feed, newest first — who saved what, who was invited, whose role or access changed, what billing did. It holds the latest 100 entries.

- The menu narrows it to **Everything**, **Saves**, **Projects**, **Users & access**, **Billing** or **Company & groups**; the search box filters by name or project.
- The **Who** column names the person. Entries with no person say **Stripe** for billing events or **Gantry** for entries Gantry wrote on its own.

Disabling a user

When someone leaves, or a device is lost, disable their account: **Users & access** > **Users** > **Disable account** on their row. It asks first — "This signs them out on all devices, and they can't sign in again until you enable the account." Their projects and history stay, and their license is freed. **Enable account** lets them back in.

To take someone out of the company for good, **Remove** them instead — see [Invitations and password resets](#).

Links and payments

- Invite and reset links work once and expire; see [Invitations and password resets](#).
- API tokens and the webhook's signing secret are shown once; see [Integrations](#) for keeping them safe.
- Card numbers never touch Gantry — Stripe hosts every payment page.

Who can use it

Everyone is covered by the logout and the sign-in rules. **Recent activity**, disabling and removing people are for company admins (and partner staff for the companies their partner looks after). See

Who can see and do what.

Good to know

- Ordinary project saves appear in the feed as saves; a project's earlier plans are kept in its History — see [Saving and history](#).
- Saving, changing and deleting a saved version each add a row, `saved version`, `changed version` or `deleted version`, shown under **Everything**. Every restore from History, whether of a saved version, an automatic save or a "Before restoring ..." row, adds two: `restored project` and `restored version`, the second naming what was restored. **Projects** shows both beside the other project rows.
- **Change password...** doesn't sign out your other devices. To end every sign-in on an account at once, a company admin uses **Set new password...** or **Disable account**.

Training

Training runs instructor-led courses, where each student practices in their own copy of a template project and the trainer follows every copy.

Training runs instructor-led courses. Each student gets their own copy of a template project to practice in, the whole class shares one *class board*, and the trainer follows every copy from the course page — progress, schedule checks and, with an answer key, how close each copy is to the right answer. The steps are in Run a training course; this page explains how it works.

Where to find it

Company page > **Training** lists the company's courses, newest first, each as its name with how many students and how many copies are handed out, and **Open**. **Open** takes you to the course's own page, which is headed with the course name. A course page has no sidebar entry.

Turning training on

Training is off until a company admin turns it on. While it is off, **Organization** shows a **Training** card with **Enable training**, which turns it on at once: the card leaves Organization and a **Training** tab appears after **Activity**.

Disable training (on the Training tab) asks first: "Turn training off? Students keep their accounts and their copies; courses can't be managed until Training is back on." Nothing is deleted, and turning training back on brings every course back. While it is off, courses can't be managed: a course page says "Training is switched off for this company.", and a course page, **New course** or **Change student passwords** left open when training goes off says the same at its next action. Student accounts are not locked out: students can still sign in and work in their copies.

A course

A course has a name, a **Template** (a project of this company that every student gets a copy of), an optional **Answer key** (another project of this company that the copies are compared with) and its students. **+ New course...** opens **New course**:

- **Name** (up to 120 characters), **Template** and **Answer key** (or "(none)");
- **New students** — how many new student accounts to make, from 0 to 500 — with a **Class password** (at least 8 characters) they all start with;

- **Re-use existing students**, offered once the company has student accounts from an earlier course.

After **Create**, Ganttry asks "Hand out copies to every student now?" — confirming hands them out and opens the course page; declining opens it with nothing handed out yet.

A course can't be changed once it exists — not its name, template, answer key or students. To change the class, create a new course (it can re-use the same student accounts). The answer key must exist before **Create**: if its project is later deleted, the course loses its key for good.

The template and the answer key stay where they are, and students can't see either. While a course uses them, only an Admin can make a view-only share link or preview crew links for them, and nobody can publish them.

Student accounts

New students are accounts named *Student 01*, *Student 02* and so on, numbered on from the company's existing student accounts, each with a generated sign-in email that no mail can reach. They sign in on the ordinary sign-in page with that email and the class password. Their emails are listed on **Users & access** > **Users**, in the folded *Generic students* list.

- Each new student account uses a license; re-used accounts need no new one. If the new students don't fit in the company's licenses, the whole course is refused.
- Students can't change their own name or email. **Rename...** on the course page sets how a student is named in that course only.
- No email ever reaches a student, so a student can't reset a forgotten password. The trainer sets it: **Change student passwords...** on the Training tab sets a new password for the students you tick and signs them out everywhere — use it between courses — and **Set new password...** on the student's row in **Users & access** > **Users** sets one.
- Students hear about their course in the app's bell: their workspace is ready, with a link to their copy.

What a student gets

When copies are handed out, each student sees exactly two projects: their own copy and the class board. They see nothing else of the company.

- The copy is the template as it stood at hand-out, named after the course and the student. It keeps the tasks, calendars, baselines, notes and custom column values; it leaves out assignees, named people and machines, the names in coverage sets and the site address. It is never published.

- A student is an **Editor** on their copy and on the class board, which the whole class edits together. They can edit the Schedule, report progress, and create new projects of their own, in their own group or in the class's shared group, where the whole class sees them.
- A student can't delete their copy, make share links, preview crew links, present on the class board, publish, or open Training.

The course page

The summary line counts the students and the copies handed out, and says whether there is an answer key. The buttons are **Open class board** (once there is one), **Hand out copies**, **Reset all...**, **Archive...**, **Delete course...** and **Refresh**.

The **Students** table has one row per student: their name with **Rename...**; their copy, which opens in the editor (with who is viewing it right now); **Progress**, the reported percent complete; **Schedule checks**, the share of schedule quality checks that pass; **Check** (below); when it was last updated and by whom; and **Reset....** The figures fill in one student at a time, for the first 40 students with copies.

The trainer can open any student's copy or the class board and work in it; the student sees the changes live. On the class board, **Tools ▾ → Present to everyone viewing...** makes the students' screens follow the trainer's.

Hand out copies

Hand out copies runs without asking. Every student who has no copy gets a fresh copy of the *current* template; a student who already has one is left alone. The first time, it also creates the class board. It re-creates a copy or a class board that was deleted, but it never refreshes an existing copy — use Reset for that.

Reset

Reset all... and a student's **Reset...** replace the copy with a fresh copy of the current template. Both ask first, because the student's edits are replaced and the copy as it stands is not saved first — only what is already in its History stays available, its saved versions and its automatic saves. The reset itself shows in History as a new automatic save under the trainer's name. A student who has the copy open gets the reset at once. Reset never touches the class board, students without a copy, or projects students made.

Archive

Archive... asks first. In one step it archives the course and every project in it, and turns each student's access from **Editor** to **Field**: students can't change their copies in the Schedule view any more, but they can still report progress in the Work view. Accounts and saved work are kept, and so are their licenses. **Unarchive** runs without asking and reverses all of it. An archived course hides **Hand out copies**, **Reset all...** and **Reset....**

Delete course

Delete course... asks first, on a live or an archived course. It deletes every student copy, the class board, the course's groups and any extra projects students created, and each student account with no other access — which frees their licenses. The template and the answer key are not deleted.

The check

With an answer key, the **Check** column compares each copy with the key, task by task, and shows the share of the key's tasks the student has exactly right: green at 100%, amber from 60%, red below. Without a key it shows "—". Hovering the figure lists up to five tasks that differ.

- Tasks are matched by their hidden identity, not by name or row, so *the answer key must be built from the template* — for example with **Make a copy...** on the template, then completing the copy. A key built separately scores 0%.
 - The check grades what the student built: names, durations, work hours, predecessors, constraints and deadlines, calendars, quantities, crew and equipment, cost, notes, outline levels and custom column values. Progress isn't graded. A task the student added doesn't lower the score; a task they deleted counts as missing.
 - The key is read fresh each time the course page opens, so editing the key updates the figures.
 - The check is the trainer's: students don't see a score.
-

Who can use it

A company **Admin** — an Admin of the company itself — and partner staff for the companies their partner looks after. Editors, **Field** users, a group's own admin and students can't open Training; a link to a course shows "Training isn't available". A field-only account, including a student whose only access is an archived course, lands on **My tasks** instead. See [Who can see and do what](#).

Good to know

- If a course's template is deleted, handing out or resetting copies is refused: "This course's template was deleted, so it can't hand out or reset copies. Create a new course from another template."
- Course actions appear in the company's **Recent activity** under **Everything**.
- Removing a student in **Users & access** isn't a way to take them off a course — it removes their access to the company.

Home

Home is your starting page — your projects grouped by favorites and recent use, your notifications, and the cheat sheet.

Home is the first page an office account sees when it signs in. It lists your projects the way you use them — the ones you starred and the ones you opened most recently — with your notifications and the cheat sheet beside them. It is built for getting back to work quickly.

Where to find it

Click **Home** at the top of the sidebar, click the Gantry logo at the left of the top row, or press `Ctrl+H`. Home needs a signed-in account.

The page head and the action bar

The page head carries one button, **+ New project**, and a line under the title that says what the list covers — your company and how many projects, for example `Northline Civil · 2 projects`.

Under it sits one row of controls:

- *The search box.* Press `/` anywhere on Home to jump to it. It filters as you type, by project name, company or who last updated it, ignoring capitals and accents. While you search, the groups flatten into one **Results** list.
- **Sort ▾** — **Last opened by me**, **Recently updated**, **Name A–Z**, **Status**, or **Company** (only while the Company column shows). The same menu holds **Favorites first** and **Show archived**. Your choices are saved to your account and follow you to other devices.
- **★ Favorites first** — a one-click toggle for the same setting, on to start with. Favorites sit above your recent projects and at the top of search results. Turn it off to put Recently opened first.
- **Import...** brings in a schedule file (see [Importing a project](#)), and **Projects** opens the [Projects page](#).
- **Inbox** shows or hides the pane on the right, with your unread count.

The project table

Projects are grouped under headings that stay in view as you scroll:

- **Favorites** — star any row by clicking its **★**, or select it and press `s`.
- **Recently opened** — up to six projects you most recently opened in the schedule, the open one first. Looking at a project's Work or Calendar view does not count, and a starred project shows

under Favorites instead.

- **Other projects** — everything else. It reads **All projects** when nothing is starred, recent or archived, and it splits by company when you belong to more than one.
- **Archived** — shown only with **Show archived** on.

The columns are Name, Status, Tasks, Last opened, Updated (who and when) and Company, which appears only when your projects span more than one company.

Each row ends with ⋮, the row's menu: **Open**, **Make a copy...**, **Save as a project template...**, **Move to group...**, **Rename...**, **Archive** (or **Unarchive**) and **Delete...**, as far as your account may — see [Opening and managing projects](#). Right-clicking a row opens the same menu. With every project archived, the table says so and offers **Show archived**.

Use the keyboard to move through the table: **↑** and **↓** move, **Enter** opens the project, **S** stars it, and **.** or **Shift+F10** opens its menu. The strip at the foot of the page shows the counts — **12 projects · 3 favorites**, or **4 of 12 match "bridge"** while you search — and these key hints.

The Inbox pane

The pane on the right holds three sections:

- **Notifications**, unread first. Click one to mark it read and jump to its project. **Mark all read** sits at the top of the section when something is unread, and **View all...** at the foot of the list opens a longer list in its own window.
- **Recent changes by others** — what teammates saved. It starts collapsed; **Show ▾** opens it, and Home remembers your choice.
- **Cheat sheet** — collapsed, at the bottom. **Show ▾** opens the same short how-to card the site publishes, with its own search box. **Open on gantry.app** opens the [cheat sheet page](#), **Full manual** opens [this manual](#) in a new tab, and  **Print / PDF** builds the two-page printable card: commands on page one, every keyboard shortcut on page two. Its first page's header gives both addresses, [gantry.app/cheatsheet](#) and [gantry.app/docs](#).

Your first visit

When your only project is the sample project Gantry creates for you, Home shows a **Start here** band: "This is a sample project. Try making a few changes. When you're ready:" followed by **Open the sample**, **New project**, **Import a project...** and **Read the cheat sheet**. It goes away once you have projects of your own. See [Creating a project](#).

Who can use it

Anyone who works in the office with a company account — an [Admin or Editor](#) — and partner staff. A Field account signs in to My tasks instead and never sees Home. See [Who can see and do what](#).

Good to know

- Home has no account section. Your profile, password, keyboard shortcuts, help and **Sign out** are in the avatar menu at the right end of the top row, and company settings open from the sidebar's **Company** row. See [Getting around](#).
- If you have no projects yet, Home says so and offers **Import...** beside the new-project button; without the right to create projects, it asks you to contact a company admin.
- On a phone, the Inbox becomes a strip you can open above the table, and **Import...** and **Projects** fold into a **⋮** menu. Each row keeps its own **⋮**.
- **File ▾ → Open project...** (**Ctrl+0**) opens Home in its **Open a project** mode: the search box has the keys, recent projects come first, there is no Inbox, and **← Back to the schedule** returns. It lists the projects of every company you work in, grouped by company. Without an account it is the only Home there is.
- Every key Home supports is on the [keyboard shortcuts page](#).

Getting around: the sidebar, pages and page addresses

How Gantry's frame fits together — the top row, the sidebar, Go to, page heads, the Back button, page addresses you can share, and presenting to a room.

Every page in Gantry hangs off one frame: a dark row across the top, a sidebar down the left, and the page itself. The schedule editor and every full page — [Projects](#), [Crew planning](#), [Company](#) and the rest — share it, so the controls you use most stay in the same place wherever you are.

Where to find it

It is always on screen. The ≡ button at the far left of the top row opens and closes the sidebar.

The top row

The top row runs across the whole window. From the left:

- ≡ (the sidebar), then the Gantry logo, which takes you to [Home](#) when you're signed in.
- On the editor and on a project's own pages, the project's name — click it for **Project settings** — and its view tabs: **Schedule**, **Work**, **Dashboard** and **Crew planning** (see [Work](#), [My tasks and Calendar](#) and [The project Dashboard](#)). On another project's Work page, its Schedule, Dashboard and Crew planning tabs switch the editor to that project first.
- On the right: the scope control (below), then the editor's own chips — the project's status, the pane toggle, who else is viewing, the save chip and, for a project in Draft, the Draft chip. Full pages hide these chips.
- Then the notification bell, the light and dark theme toggle, ? (Help & support) and your avatar, last.

A Field account sees **My tasks**, **Work** and **Calendar** in the top row instead of project tabs, and has no sidebar.

The sidebar

The sidebar is the map of the app. It lists only the places your account can open, under four headings:

- **Planning** — Home, My tasks, Projects, [Master plan](#) and Calendar.
- **Resources** — [Roster & equipment](#), [Crew planning](#) and [People](#), in the order a team uses them: set up the list, plan the counts, book the names. Roster & equipment is who and what your company has; Crew planning, how many of each trade one project needs, per day; People, the named people booked on tasks across projects.

- **Insights** — [Reports](#).
- **Administration** — Company.

A heading with nothing in it for you is not drawn. Home and My tasks need a signed-in account; Master plan and People need [Master planning](#); Company is for company admins and partner staff. Projects, Calendar, Crew planning and Reports are there for everyone who works in the office.

Five rows carry a one-line description — for example, Master plan reads "Several projects on one date axis" and Roster & equipment "Who and what your company has". Under the headings, **Recent** lists the five projects you opened most recently, the open one first and in bold. Click the open one to go back to the editor. Clicking another project keeps you on the same view when you are on Work, the Dashboard, Crew planning or Calendar; from anywhere else it opens that project in the editor. **All projects** opens the Projects page, and **Help & support** sits at the foot.

The sidebar has no create button: **+ New project** is on Projects and Home, and the editor's **File ▾** menu keeps **New project** and **Open project....**

Go to

Go to finds a page, a command or a project by name. Press **Ctrl+K** (**Cmd+K** on a Mac), or choose **Tools ▾ → Go to...**, the last item under App. Type a few letters and the list narrows to what matches, in three groups:

- *Go to* — the pages your account can open from the sidebar, the project tabs and the **Tools ▾** menu, each with its sidebar line where it has one, such as People's "Book named people on tasks, across projects".
- *This project* — the commands in the editor's **File ▾**, **Export ▾** and **Tools ▾** menus, shown with their menu, such as **Tools ▾ > Save a version...**; a **Tools ▾** command shows its description too. A command that is grayed out in its menu is grayed out here too.
- *Recent projects* — the projects in the sidebar's **Recent** list.

↑ and **↓** move through the list, **Enter** opens the row you are on (the best match until you move), and **Esc** or **Close** closes Go to. It lists only what your account can open, and each row does what its sidebar row, tab or menu item does.

Go to lists only your recent projects. When nothing matches, it says so and points you to the page that lists them all: **Nothing matches "culvert". Not here? Find it in Projects**. Click **Projects** there, or press **Enter**, and the **Open a project** page opens with what you typed in its search box.

Over a full page, such as People or Reports, Go to lists pages and projects but no commands, because the editor's menus act on the editor. It doesn't open while you are typing in a cell or in the find bar, over a dialog, or while you look at an earlier version. A Field account has no Go to.

Pinned, icon rail or drawer

How the sidebar sits depends on the window and the page:

- *At 900 px and wider*, it is pinned open beside every full page. ≡ folds it to a narrow icon rail and back, and your browser remembers the choice. The rail's icons show their names when you point at them or tab to them.
- *On the editor*, it always starts as the icon rail, so the grid and Gantt keep the width. ≡ opens the full sidebar over the editor. `Esc`, a click outside it, moving focus away, or going anywhere closes it again — the Gantt never narrows.
- *The Master plan and People* pin the sidebar only where the Master plan's three-week window still fits beside it, and show the icon rail otherwise.
- *Below 900 px*, the sidebar is a drawer that slides over the page, with the page dimmed behind it.

The page head

Every full page starts the same way: its title, and under it a line that says what the page covers —

`Northline Civil · All groups · 22 projects` on Projects, the project's name on Work, the Dashboard and Crew planning, `All your projects` on Calendar. A page has at most one main button: **+ New project**, on Projects and Home only.

A project's own pages (Work, the Dashboard and Crew planning) carry **Open schedule**, which opens that project in the editor. Company, Training and the partner dashboard carry **← Back to the schedule**. Other pages have no Back button of their own — use the sidebar or your browser's Back.

The scope control

The first item on the right of the top row says which company and group you are looking at. With one company and no groups it is plain text. Otherwise it is a menu reading *company · group ▼*, with **Company** (a ✓ beside the current one), **Group (All groups)**, then each group) and a *Manage* entry named for each company you administer.

It is navigation, never a permission. It changes what Projects and Home list and which company Roster & equipment and Company open — never what your account may see. Each page's scope line says what that page actually covers; My tasks, Calendar, the Day plan and the Master plan don't follow the pick; each says its own scope. The pick lasts until you close the browser tab. On a narrow window it moves to the top of the drawer.

The avatar menu

Your avatar, at the end of the top row, opens the same menu everywhere: your name and role, **Profile...**, **Change password...**, a partner dashboard entry for partner staff, **Keyboard shortcuts...**, **Help & support...** and **Sign out**. See [Your account](#).

Projects and the Schedule

The thing you plan is a *project* wherever Gantry names it: Projects, **+ New project**, **Open a project**, project templates. *Schedule* names only a project's Gantt view — its first tab — the timing it shows, and the verb. Page addresses and file formats that used older words keep them, so existing links and saved copies still work.

Page addresses and the Back button

Every page has its own address. To send someone to a page, copy the address from your browser's address bar. When they open it, they land on the same page if their account can open it — otherwise they see the message below.

The browser's Back always goes back one view:

- **Open schedule** adds the editor as a new step, so Back returns you to the page you came from.
- **← Back to the schedule** returns to the editor without dropping you out of Gantry, even when you arrived from a link.
- Each Company section is a step of its own.
- Switching projects from **Recent** keeps you on the same kind of page, as described above.

Open in schedule on [People](#) or the [Master plan](#) opens the editor with that task selected, its row in the middle of the grid when there are rows after it, and its Gantt bar in view.

Esc never closes a full page.

"Isn't available"

When your account may not open a page — or the link is out of date — the page area says *Company isn't available* (or whichever page it was), then "Your account doesn't have access to this page, or the link is out of date." One button takes you to Projects, or to My tasks for a Field account. The message names the page, never a record, and reads the same whether the record doesn't exist or you may not see it. The button, **Esc** or going anywhere else closes it.

A Field account that opens a page it can't use — the editor, Projects, Reports, Home and the like — lands on My tasks.

Presenting to a room

For a training session or a meeting without screen sharing, open **Tools ▾** → **Present to everyone viewing....** Your scroll position and Gantt zoom go to everyone who has the same project open, and their screens follow yours. A pill on their screen reads *Following* with your name — *click to stop*. Any scroll or keystroke of their own stops following; clicking the pill follows again.

There is one presenter per project — the last person to start presenting takes over. The menu item reads **Stop presenting** while you present. The presenter edits and everyone else watches the changes arrive; if several people edit at once, their saves still go through the usual conflict review (see [Saving, history and opening projects](#)).

Who can use it

Everyone sees the frame, trimmed to what their account can open — see [Who can see and do what](#). Presenting needs a signed-in company account; a Field account can follow a presenter but not present.

Good to know

- On a phone, a bottom bar replaces the project tabs — see [On phones and tablets](#).
- Keyboard users: the [keyboard shortcuts page](#) lists every key, and [Accessibility](#) says how focus moves when a page opens and closes. **Ctrl+K** opens [Go to](#), which reaches the pages on the sidebar, the project tabs and **Tools ▾** from the keyboard.
- Who-is-viewing avatars and live selections are explained on [Companies and groups](#).

The editor's toolbar

The editor's two toolbar rows — the project's name and chips on top, the File, Export, Tools and Format menus and the everyday buttons below.

The editor has two toolbar rows. The top row says which project is open and how it stands; the bottom row holds four menus and the buttons you reach for all day. The menus keep their names as the window narrows — on a phone, **Format ▾** moves into the **⋮** menu — and every button has a tooltip.

Where to find it

Open any project in the schedule — the **Schedule** tab, or a project from **Recent** in the sidebar. The toolbar sits across the top of the grid and Gantt.

The top row

The top row is the same dark row every page shares (see [Getting around](#)). On the editor it carries:

- *The project's name*. Click it to open **Project settings**: the project's name, company, status, start date, working calendar, critical threshold, Activity ID display and baselines, among others.
- *The status chip* — the project's status: Planning, Pending, Active, On hold or Complete. Clicking it opens Project settings too.
- *The pane toggle* — the grid only, the grid and the chart, or the chart only. Gantry remembers your pick.
- *Who else is viewing* — teammates' avatars.
- *The save chip* — the live save state; click it for **Save now**, **Save a version...** and **History....** See [Saving, history and opening projects](#).
- *The Draft chip*, for a project in Draft. See [Draft and Publish](#).

The bottom row

The bottom row starts with four menus:

- **File ▾** — **New project**, **Open project...** (**Ctrl+O**, the **Open a project** page), **Import file...**, **Save a copy (JSON)** (**Ctrl+S**), **Share...** and **Project files...** when you are signed in, and **Project settings....**
- **Export ▾** — **PDF...**, **Excel (.xlsx)**, **CSV** and **MS Project XML (MSPDI)**. See [Print and export](#).

- **Tools ▾** — described below.
- **Format ▾** — **Bold**, **Italic**, **Underline**, **Strikethrough**, **Header row** and **Color & text...** for the selected rows. See [Colors and text](#).

Then come the direct buttons, in groups:

- **Undo** and **Redo**.
- **Task** (insert a task below the selection) and **Delete**.
- **Outdent**, **Indent** and **Link** (link the selected tasks finish-to-start).
- The Gantt view buttons: zoom out, zoom in, **Fit** (the whole project in the window), **Today**, **Critical** (highlight the [critical path](#)), **Baseline** (pick which baseline to draw, or off), **Crew** (the crew histogram under the chart) and **Views** (filters, saved views and the 3-week lookahead — see [Filters, saved views and the 3-week lookahead](#)).

Point at any button for its tooltip, which names its keyboard shortcut where it has one. The [keyboard shortcuts page](#) lists them all.

Tools ▾

Tools ▾ groups its items under three headings:

- **This project** — **Dashboard**, **Crew planning**, **Book people** (signed in, on a project you can edit, but not on a student's copy or a class board in [Training](#)), **Update progress...**, **Calendars...**, **Shared coverage...**, **Schedule quality checks...**, **Cash flow...**, **What crews see...** and **Day notes...** (when signed in), **Save a version...**, **History...**, **Present to everyone viewing...** (when signed in), and **Save as a project template...** (when signed in and allowed).
- **Company** — for signed-in office accounts: **Roster & equipment**, then **Master plan** and **People** if you have [Master planning](#).
- **App** — **Appearance** (each click moves on to the next of Auto, which follows your device, Light and Dark), **Keyboard shortcuts...**, **Help & support...** and **Go to...** (**Ctrl+K**).

Point at any **Tools ▾** item for a line that says what it does — for example, **Save a version...** reads "Name and keep this plan as it is now". The menu shows no other text beside the labels, only **Ctrl+K** beside **Go to...**. On a touch screen there are no hover lines, and a tap runs the item; Go to shows the same lines under each command.

Where each one leads:

- **Dashboard** and **Crew planning** open this project's [Dashboard](#) and [Crew planning](#) pages; **Roster & equipment** and **Master plan** open [Roster & equipment](#) and the [Master plan](#).
- **People** opens [People](#), and **Book people** opens this project on it.

- [Update progress...](#) records actuals against a data date.
 - **Calendars...** opens the work calendars — see [Scheduling](#).
 - [Shared coverage...](#), [Schedule quality checks...](#) and [Cash flow...](#) each have their own page.
 - **What crews see...** and **Day notes...** belong to [Draft and Publish](#).
 - **Save a version...** and **History...** are on [Saving, history and opening projects](#).
 - Presenting is on [Getting around](#).
 - **Go to...** opens [Go to](#), to find a page, a command or a recent project by name.
-

As the window narrows

The direct buttons show text labels down to laptop widths. As the window narrows, the labels drop away in two steps; the icons, tooltips and menu names always stay. On a phone, the less-used buttons fold into a $\cdots$ menu (**More tools**) instead of scrolling off the edge — outdent, indent and link, the **Format ▾** items, zoom, **Fit to window**, **Scroll to today**, **Critical path**, the baseline choice and **Crew histogram**. **Views** stays on the toolbar.

Who can use it

Admins and Editors use the editor and its toolbar; a Field account never opens the editor. Some items appear only when you are signed in to a company account, as noted above. See [Who can see and do what](#).

Good to know

- **Baseline** is grayed out until the project has a baseline — see [Baselines and variance](#).
- **Share...** makes a view-only link to the project; it needs a signed-in company account.
- Help & support is also the **?** at the right of the top row, and in your avatar menu.

Creating a project

Start a project blank or from your company's project templates, set its details before anything is saved, or copy one you already have.

Every new project starts in one dialog, **New project**. You pick what it starts from, fill in its details, and nothing is saved until you press **Create project** — so you can change your mind at any point. You can also start from a copy of a project you already have, or from a file (see [Importing a project](#)).

Where to find it

The same dialog opens from each of these:

- **+ New project** on Home and on the Projects page.
- **File ▾ → New project** in the editor.

When you belong to more than one company or group, a **Company or group** row comes first, so you pick where the project lives. It starts on the company the [scope control](#) at the top shows, or on the group you chose there when that group is in the list; pick another to put the project somewhere else. It never starts on a company or group where your role is Field, since only an Editor or an Admin can create a project there. A copy (below) starts on the company or group of the project it copies when that one is in the list.

Start from

The **START FROM** list offers:

- **Blank project** — always first. The project starts empty.
- *Your company's project types*. Each active type is its own row, and picking one also picks its default project template. With more than eight templates, a search box ("Search project templates") narrows the rows for the type you picked.

Project types and templates are set up by a company admin — see [Project types and project templates](#). A company admin also sees **Manage project templates...** at the foot of the list.

On a phone, this step is its own sheet, **Start from**, with **PROJECT TYPE** and **PROJECT TEMPLATES** headings and a **Select** button.

If your company has no active project types or templates, the dialog says "No project templates yet — this project starts blank." When you use Gantry without a company account, it says instead: "Saved in this browser. Project templates and company settings come with a Gantry account."

Project details

PROJECT DETAILS holds the same fields as Project settings:

- **Project name**
- **Company**
- **Status**
- **Project start date** — tasks with no predecessors or constraints start here.
- **Working calendar** — click it to set up the project's work week and holidays without leaving the dialog; ← **New project** brings you back. See [Scheduling](#).
- **Critical total float (working days)** — how much float still counts as critical. See the [critical threshold](#).

Below the details, the **WHAT THIS PROJECT STARTS WITH** band lists the company settings the project picks up — **Company**, **Color tags** and **Working calendar** — and, once you pick a template, a **Columns** row naming the template's own added columns (the first three, then "+N more"). The band's hint gives the order they apply in: "Applied when you create the project: company settings first, then the project template, then anything you changed above."

Press **Create project** to create it.

Changing your mind

Close the dialog after typing something and it asks **Discard this new project?** — "Nothing has been created yet. Your settings will be lost." Choose **Keep editing** or **Discard**. Close it with nothing typed and it simply cancels; the status line reads "Canceled".

Other ways to start

These don't go through the dialog:

- *A copy.* On Home (or **File ▾ → Open project...**), **Make a copy...** in a project's ⋮ menu asks for a name (the project's name plus "(copy)" to start) and creates the copy. The original stays exactly as it is. A copy keeps its source's own settings, its site address and everything on its tasks, such as dates, crew and equipment needs, notes and progress, but it has no bookings and nobody on **Assigned To**. The status line says so: `Created "Bridge 12 (copy)" from "Bridge 12" – the original is untouched · the copy has no bookings or assignments` (or `no bookings`, or `no assignments`, by what the source held).
- *From an earlier version.* In a project's History, **New project from this**, in a row's ⋮ menu, copies that saved version or automatic save into a fresh project in the same company or group, named

after it, such as "Bridge 12 (Plan A)". It is a copy like the one above: no bookings and nobody on Assigned To. See [Saving, history and opening projects](#).

- *From a file.* **Import...** on Home, or **File ▾ → Import file...**, brings in an MS Project, P6, Excel or CSV schedule. See [Importing a project](#).
- *The sample project.* The first time you open Ganttry with no projects, it creates a sample project so you have something to try. While it is your only project, Home offers **Open the sample**.

Who can use it

Admins and Editors can create projects in the companies and groups they belong to. A Field account cannot. If you can't create projects, Home tells you to ask a company admin. See [Who can see and do what](#).

Good to know

- The project's **Site address** — one line, *Street, city* — is set later, in Project settings. It prints under the project name on the Work tab and travels with the project. Saving the project as a template, or copying it for a training course, leaves the address out.
- A template brings its tasks and its own columns. Your company's settings, the template and your own changes apply in that order, so what you typed in the dialog wins.
- To keep a project as a starting point for the next one, see **Save as a project template...** on [Project types and project templates](#).

On phones and tablets

What changes when you open Ganttry on a phone or a tablet, and which work each size of screen suits.

Ganttry runs in the browser on a phone or tablet as well as on a desktop. The whole app adapts to the screen — nothing needs pinching — but the layout changes, and some work suits a bigger screen better than others.

Where to find it

There is nothing to switch on. Open Ganttry in your phone's or tablet's browser and it lays itself out for the screen. A phone here means a touch device 700 px wide or narrower.

On a phone

- *A bar along the bottom* replaces the project tabs, so you switch views with a thumb: **Home**, **Schedule**, **Projects**, **Work** and **Calendar**. Without a company account there is no Home; a Field account gets **My tasks**, **Work** and **Calendar**. The Dashboard is **Tools ▾ → Dashboard**.
- *≡ opens the sidebar as a drawer* over the page. When the top row has no room for the scope control, it moves to the top of the drawer.
- *The editor shows one pane at a time*. The grid gets the whole screen, and the pane toggle swaps to the chart and back.
- *The editor's top row is trimmed*. It drops the theme toggle and **?** — both stay in **Tools ▾** under **App**, and your avatar menu keeps **Help & support...** — and it shortens the project name, so your avatar, with **Sign out** in its menu, is always on screen. When a Draft project's chip shows, the chip shortens too (tap it to publish), and on a phone up to 480 px wide the project's name steps aside for it, so the bell and your avatar stay on the row; **File ▾ → Project settings...** still opens the project's settings. Full pages keep their top row as it is.
- *The toolbar folds*. The less-used buttons move into a **⋮** menu instead of scrolling off the edge; **Views** stays on the toolbar. See [The editor's toolbar](#).
- *Rows of action buttons show only their icons*, and some fold into a **⋮** menu; a button that opens a menu keeps its words.
- *Big dialogs open full-screen* — **Update progress...**, importing, **Cash flow...** and the like. **File ▾ → Open project...** opens the **Open a project** page: tap anywhere on a row to open it, or its **⋮** for its menu.

- *The Work board snaps one column at a time*, with the next column peeking in. The dots underneath jump straight to a status, each card carries a status chip, and the `:` menu on a card changes its status without dragging. Dragging still works — the board scrolls when you reach the edge.
- *Tables pan inside their own card* on the Company pages, with the first column pinned, and the users list turns into cards.
- **Home** folds its Inbox into a strip above the table, and **Import...** and **Projects** into a `⋮` menu. Each project row keeps its own `⋮`, a full fingertip wide.
- *Installed as an app*, the page starts below the phone's status bar, and on a phone held sideways the top row and the full pages keep their controls clear of the camera.

On a tablet

Tablets with real touch — 1024 × 768, 834 × 1112 and 1180 × 820, either way up — get the desktop pages without sideways scrolling:

- Rows of action buttons shrink their labels to icons, and then fold into a `⋮` menu, as the space runs out.
- On the editor, the top row gives way from the middle: the project name shrinks first and the project's tabs scroll in their own strip last, so the save chip, the Draft chip, the bell and your avatar stay on screen.
- On a touch tablet between 701 and 1,199 px wide, the editor's top row is trimmed as on a phone, and its controls get full-height tap areas at least 40 px tall.
- Below 900 px wide, the sidebar is a drawer, as on a phone.

Side panes

On Home, My tasks, the Calendar, Work, Roster & equipment and Crew planning, the side pane sits beside the list (the Calendar's beside the month) wherever there is room — on a tablet, a computer or a phone held on its side. It stays in view as the page scrolls, and scrolls on its own. On Work, the Calendar, Roster & equipment and Crew planning, a task, a day or a row you pick opens the pane at its top.

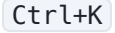
On a phone held upright the pane is a strip above the list, and Work opens a task in a sheet instead. There, picking a person or a machine on Roster & equipment, or a row on Crew planning, brings the page up to the strip.

Turning a phone keeps what you opened in view. Turned upright, each strip opens at its top, and with a person or a machine open on Roster & equipment, or a row on Crew planning, the page goes up to

it. Turned on its side with a task open on Work, the task's details stay beside the list.

Tap to read

On a computer, some words and marks explain themselves when you point at them: an *Old dates* hint, a  chip or a line ending in  (such as **2 Laborer?**) on the Work page, a grayed-out **Status ▾** on the Work board, a day's demand or a **NOT NAMED** count on People, or a score or "—" in Company's projects table. On a touch screen, tap one instead: its sentence opens in a note under its row, for example "This list may be out of date. Open this project's Work view to refresh it." When there is no room below, as at the bottom of a list, the note opens above it instead, so what you tapped stays under your finger. A second tap,  or a tap anywhere else closes it, and only one is open at a time.

On a tablet, **Tools ▾** shows no hover lines, only its labels (and  beside **Go to...**), and a tap runs the item; the line each item shows on hover is under it in Go to instead.

Text size

A larger text size — 150 % in Safari's text size menu, or your phone's larger text setting — or a wider font doesn't break the field pages: My tasks, the Day plan and a crew link wrap rather than cut or overlap. People folds its window and sort buttons into ⋮ sooner, rather than let them overlap.

If a page stops loading

- *A stalled connection.* My tasks, the Calendar, the Day plan, the TODAY card and People stop waiting after 30 seconds and say what didn't load — for example **Could not load your tasks — check your connection**, with **Retry** — instead of loading forever. What a page showed before stays on screen.
 - *A browser that blocks website data* (in Safari, the Block All Cookies setting). Without a company account and in the public demo, Gantry keeps your projects in the browser, so it can't open there and says: "Gantry can't open here: this browser is blocking website data. Allow cookies and website data for this site (in Safari, turn off Block All Cookies), then reload." Crew links and itineraries keep nothing in the browser and open as usual.
-

What works best where

- *A phone* suits the field: checking **My tasks**, moving work along the Work board, updating progress and looking at the Calendar. See Work, My tasks and the calendar.
- *A tablet* runs the same pages as a desktop, touch-sized.

- *A desktop or laptop* suits building and changing a schedule: the grid and the Gantt side by side, the sidebar pinned beside full pages, and every toolbar label showing.
- *The Master plan* needs room: at 780 px wide or narrower it shows only "The master plan needs a wider screen." — three weeks of dates side by side don't fit — with buttons to **Projects** and **Work**.
- *People* works on a phone in its own way: instead of the grid it shows one day at a time, with the week's days to tap between, and lists who is booked where that day. Each trade's head carries that day's demand, such as `2 need · 1 booked · 0 free`, red when even everyone free falls short. Tap a person to see their day and book them. See [People](#).

Who can use it

Everyone. The pages you see on a phone are the same pages your account can open on a desktop — see [Who can see and do what](#).

Good to know

- On a phone or tablet, the work pages also offer to install Ganttry as an app on your home screen. See [Work, My tasks and the calendar](#).
- Tap targets on touch screens are larger — see [Accessibility](#).
- The ≡ button works at every width; on a wide screen it folds the sidebar instead of opening a drawer. See [Getting around](#).

Accessibility

What Gantry's frame and its two grids guarantee for keyboard and screen-reader users, how each promise is checked, and what no test covers.

Gantry's frame — the top row, the sidebar, every full page and the main dialogs — is built to work with a keyboard and a screen reader, at large text sizes and on small screens. So are its two grids: the editor's task grid and the People page. This page lists what they guarantee, how each part is checked, and what no test covers.

Where to find it

There is nothing to turn on. The guarantees below apply everywhere the frame does. For light or dark, use **Tools ▾ → Appearance**.

Page structure for screen readers

- Every full page is one main region, named by its one heading. The editor's own area is a main region named *Schedule*.
 - The editor's toolbar is the page banner. The sidebar, the project tabs and the phone's bottom bar are named navigation regions.
 - The "isn't available" message (see [Getting around](#)) is a named region of its own.
-

Every control has a name

Every button, box and menu has a name a screen reader can read out — a placeholder is never used as one. That includes the company picker on Company, the boxes for adding a trade on Crew planning, and the Share dialog.

Using the keyboard

- Opening a full page moves focus to its heading, and the editor behind it is set aside so your keys can't reach it. Closing the page returns focus to the control that opened it, or to the grid.
- Opening or creating a project, from **File ▾**, the Open a project page, the sidebar, Go to, or a page such as Home or Projects, moves focus to its grid, unless a dialog, a menu or a text field still has it.
- **≡** moves focus into the sidebar drawer or the sidebar opened over the editor. Moving focus out of it closes it; **Esc** closes it and puts focus back on **≡**.

- The icon rail's icons show their names when you tab to them, as well as when you point at them.
- Focus is always visible, and pages keep it clear of the sticky bars, the phone's bottom bar and the drawer.

Every keyboard shortcut is on the [keyboard shortcuts page](#).

The task grid

To a screen reader the editor's grid is a tree grid named *Tasks*, and it stays one stop in the `Tab` order:

- The arrow keys move the active cell, and the screen reader reads it with its column and row. A hidden header row names each column.
- Each row says how deep it sits in the outline, and a summary says whether it is expanded or collapsed. A cell you can't type in, such as a summary's dates or `Booked`, is read as read-only.
- The grid says what its own keys just did: a value you entered or cleared (`Start: Tue Oct 13`, `Notes: empty`), `Indented 1 task`, `Collapsed Sitework`, or `3 rows selected`. It never speaks a teammate's change. Deleting tasks and pasting are said once, on the status line.
- `Tab` indents in the grid, so press `Esc`, then `Tab`, to move on (`Shift+Tab` to go back). After `Esc` the grid says `Press Tab to leave the grid`.
- `Alt+Shift+-` collapses the selected summary rows and `Alt+Shift+=` expands them, so the keyboard reaches collapse on a Mac too. On a Mac, Alt is the Option key.

Look and a view-only link show the same grid, read-only: there `Tab` moves on, and the arrows and the collapse keys still work. See [Editing in the grid](#).

The People grid

`People` is a grid with one `Tab` stop. The arrow keys move a cursor by person and day, and `Enter` opens that person's day. A screen reader reads the cursor: the person, the day and what they do that day, for example `R. Diaz · Wed Oct 7 · Grade approach, Bridge 12, 2 of 2 · Day note: Inspector on site at 8:00. · Set forms, Yard Expansion, 1 of 1 · double-booked`. Each task comes with its project and that day's staffing. A task they are only on Assigned To for says `Assigned to`, a day note is read once per project, and a day with nothing reads `free`. People's other controls in the grid, such as **Book crew...**, each sit in a cell of a row.

Go to

`Ctrl+K` (`Cmd+K` on a Mac) opens `Go to`: a search box over a list. `↑` and `↓` move through it, and the screen reader reads the row you are on, its group and its place in the list. `Enter` opens it, and `Esc`

closes Go to and puts focus back where it was. When nothing matches, **Enter** opens the Projects page with what you typed, and **Tab** from the box reaches the line's **Projects**, then **Close**.

Status is never color alone

- Status marks carry words, not just a color.
 - The current row, tab or bottom-bar item is announced as current, and marked with more than color.
 - On the Calendar, where the status toggles fold down to marks, each status gets its own shape as well: ring, half, square and disc.
-

Size and reflow

- Every target is at least 24 × 24 px.
 - With a touch screen, rows in lists and the sidebar, and the bottom-bar tabs, are 44 px tall, buttons 40 px and search boxes 36 px.
 - On Roster & equipment, People's crew heads and the field pages, the small controls a thumb uses most reach 44 px: the boxes, tabs and links in Saved crews and the side pane, **Book crew...**, the Day plan's **<**, **>**, **Today**, **Day / Week** and **Mine / Everyone**, My tasks' side pane rows, the TODAY card's **Day plan →**, and the **X** that takes a person off a task's Assigned To on Work. The buttons in a page's row of action buttons stay 40 px there too, as do the Calendar's **<**, **Today** and **>**.
 - Go to's **Close** is 44 px tall on a touch screen.
 - On a touch screen, some controls stay smaller: the % box on Work's rows is 36 px tall, the Calendar's bars are 28 px, and the top row stays 32 px tall, so each of its controls taps at the row's full 32 px height and at least 40 px wide (32 px wide on the schedule screen of a phone narrower than 360 px).
 - The list pages, Company's sections, and the New project, Profile and import dialogs reflow at 320 px wide without sideways scrolling. The editor's toolbars and grid scroll inside their own areas instead.
-

Contrast

Text and the edges of controls in the frame and the dialogs meet the WCAG contrast levels — 4.5 to 1 for text, 3 to 1 for control edges — in both the light and the dark theme.

The grid's and the Gantt chart's colors are checked against the same levels, in both themes. While a filter is on, the summary rows kept above the matches read in gray in the grid, not faded, and each matching row shows a small mark beside its number. A kept row is described to a screen reader

as `Not a match – shown for the tasks under it`. Some pairs fall short and are left as they are for now:

- *Just short*, between 4.2 and 4.4 to 1: colored text on a selected row, and the Gantt's day labels in the light theme.
- *Short*, between 3.6 and 4.5 to 1: those kept summary rows when they have a `color tag`, read on the tag's color. That is every one of the app's ten tag colors in the light theme, and four of them in the dark. A very dark or very light color you pick yourself reads lower.
- *Far short*, about 1.7 to 1 in the light theme and 2.2 to 1 in the dark: the Gantt still fades those summary rows' labels.

How it is checked

- *Checked automatically on every build*: page regions and the one heading, every control named, the covered editor set aside with focus moved and restored, status never shown by color alone, and the contrast pairs. A build that fails one of these stops.
- *Checked in real browsers*: visible focus, focus never hidden behind a bar, target sizes, and reflow at 320 px — at 1440 × 900, 1280 × 800 and 1024 × 768, and on real touch at 834 × 1112, 768 × 1024 and 390 × 844. The two grids are also checked in Chrome, by reading what the browser hands a screen reader: their roles, the active cell, the words they speak, and the way out of the task grid. These checks are advisory: a failure does not stop a release.
- *Listened to once*: both grids were walked with VoiceOver on a Mac, in Safari and in Chrome, on an early test build of this release, and each line was heard as expected. Some words came after that walk and have not been listened to yet: in the People grid, a task's project, `Assigned to`, a day note, `double-booked` and the controls in cells; the line each **Tools ▾** item adds; the Booked column; and, from 1.12.0, a kept row's description under a filter (read in Chrome's tree only). VoiceOver may read a Booked cell's text twice.
- *Not checked*: other screen readers (such as NVDA, JAWS or TalkBack) and Windows, zooming in with long names, and whether navigation stays consistent from page to page, which is judged by eye.

Who can use it

Everyone — these guarantees are not tied to a role. See [Who can see and do what](#).

Good to know

- The guarantees cover the frame, the dialogs named above and the two grids. The grid's other keys are on [Editing in the grid](#) and [Keyboard shortcuts](#).
- The Master plan's sections, which also edit rows, don't have the grids' screen-reader words.

Editing in the grid

How the editor's grid works — selecting and editing cells, moving and indenting rows, header and blank rows, columns, and what undo covers.

The grid is the table on the left of the editor: one row per task, one column per field. It behaves like the spreadsheet you already know — click, type, press `Enter` — with a few scheduling habits of its own, such as indenting tasks under a summary.

Where to find it

Open a project in the schedule. The grid fills the left side, beside the Gantt chart; the pane toggle in the top row shows the grid alone, the chart alone, or both.

Selecting and editing

- Click a cell to select it. Click it again, press `Enter` or `F2`, double-click, or just start typing to edit it.
- While editing, `Enter` finishes the edit and moves down, and `Tab` finishes it and moves right. The arrow keys move between cells.
- Double-clicking puts the cursor exactly where you clicked, and while you edit you can click or drag in the text to move the cursor or select.
- To select rows, click a row number. `Shift+click` selects a range and `Ctrl+click` adds or removes a row. `Ctrl+A` selects every visible task.
- `Delete` clears the cell. On a Start cell it also clears the date pin — see [Scheduling](#).
- `Ctrl+=` inserts a task and `Ctrl+--` deletes the selected tasks. The right-click menu also has **Insert task above**, **Insert task below** and **Duplicate task**.

Leaving the grid with the keyboard

In the grid, `Tab` indents. To move focus on to the next control instead, press `Esc`, then `Tab`; `Esc`, then `Shift+Tab` goes back. Any other key in between, or a click, cancels the `Esc`, so a `Tab` after it indents as usual. While a right-click menu is open, or **Split task (click the bar)** is waiting for your click on the chart, `Esc` cancels that instead.

Moving rows

Drag a row number to move a task. A multi-row selection moves together, and a summary brings its subtasks. **Alt+↑** and **Alt+↓** do the same from the keyboard, and the right-click menu has **Move up** and **Move down**. Links between tasks always survive a move.

While a filter is on, moving rows is switched off — see [Filters, saved views and the 3-week lookahead](#).

Indenting and collapsing

- **Tab** indents the selected rows and **Shift+Tab** outdents them. The task above an indented row becomes a summary task, which takes its dates and progress from its subtasks.
 - Right-click rows for insert, delete, indent, outdent and link.
 - Click the ▼ arrow on a summary, or right-click it → **Collapse**, to fold its subtasks away. Row numbers keep their gaps, as in MS Project, and the PDF can print the collapsed outline.
 - From the keyboard, **Alt+Shift+–** collapses the selected summary rows and **Alt+Shift+=** expands them (on a Mac, Alt is the Option key). While a filter is on they do nothing, as the ▼ arrow does, and the status line says **Collapse is inactive while a filter is applied**.
 - Inserting a task below a *collapsed* summary puts the new row after the whole phase (the summary and its subtasks), at the summary's own level, and the phase stays folded. Below an expanded summary, the new row goes straight under it as a subtask.
-

Header rows

Right-click a row, or open **Format ▼**, and pick **Header row** to turn it into a section header at once — it doesn't need subtasks first. A header row looks and schedules like a summary: bold, no bar, and blank dates until it has subtasks. Every row you add below it indents underneath automatically, until you outdent back out.

Once it has subtasks it is an ordinary summary. Turning **Header row** off on a row that still has subtasks changes nothing — its position makes it a summary.

Blank rows

You can add as many empty rows as you like. A row with nothing in it has no dates and no bar, and links, summaries, the quality checks, progress, the work views and every export all ignore it. Someone booked on an empty row is booked on no day: People, the reports and the crews' day plans don't count it, so it never makes a double booking. The moment you type anything into it — a name, a duration, a date — it schedules like any other task. Clear it out again and it goes quiet.

Blank rows are handy for sketching the shape of a project before the details exist, without upsetting the schedule.

Columns

- **Size:** double-click a column header, or right-click it → **Auto-fit width**, to fit the widest entry. Drag a header's edge to resize.
- **Order:** drag a header to move the column.
- **Show and hide:** right-click a header → **Hide column**; **Show all columns** brings every hidden one back. Hidden columns keep their data. They drop out of Excel and CSV exports until you show them again; the PDF dialog picks its own printed columns.
- **Add or show columns...** (right-click any header) opens the column picker: a shelf of the most common columns, every built-in column grouped with a plain-English description, a search box, and your own columns. Many useful columns — WBS, Total Float, Cost and more — start hidden; this is where you find them.
- **Booked**, a hidden column right after Assigned To, lists who and what is booked on each task, by crew line and machine type, with the days in parentheses for anyone booked by the day — for example `Laborer: Sal Rinaldi (Oct 12–16), Worker 014 (Oct 12–16)`. A long list is cut with ... at the column's width; point at the cell to read up to 120 characters. It is read-only: typing, `Enter` or `Delete` on it books no one, and the status line says `You can't type here: book people in People or with Shift+F2.` (`You can't type here.` on a summary, or where you can't book anyone). Book on `People` or with `Shift+F2`. While it is shown, Excel and CSV exports carry its text, cut at 120 characters the same way.
- **Column guide...** (also in Help & support) explains what every column does. **Column glossary in the manual**, at the guide's foot, opens the manual's [column glossary](#) in a new tab; it has the same descriptions.

You can add your own columns in four types: [free text](#), a [checkbox](#) (click the cell, or press `Enter`, to tick it), a [dropdown list](#) (you set the choices, and can edit them later), and [symbols](#) (`✓` `×` `⚠` `▶` `★` `▲` `▼` `●` `◉` `○` from a picker). Your own columns can be renamed or deleted from the header's right-click menu. Columns your company defines for every project are on [Company columns](#).

Who made and changed each row

Four hidden columns — [Created](#), [Created by](#), [Modified](#) and [Modified by](#) — show who created and last changed each row, and when. Gantry fills them in as people edit. Signed in to a company account, they record names; without one, only dates. Rows last changed before these columns existed stay blank.

Undo

Ctrl+Z undoes and **Ctrl+Shift+Z** redoes, up to 100 steps, and they cover every editing action.

Undo does not cover how you look at the project: column widths, showing, hiding or reordering columns, applying a saved view, collapsing a phase, or the task filter.

Undo history starts over whenever a different plan loads — opening another project, opening a file, restoring from History, resolving a conflict, recovering unsaved changes, a save from another tab or another person, or a trainer resetting a class copy. It does not survive a reload.

Who can use it

Admins and Editors edit in the grid. A Field account never opens the editor; it reports progress from My tasks and Work instead. See [Who can see and do what](#).

Good to know

- A summary's dates and progress come from its subtasks, so you can't type into them; the status line says "That field is calculated from subtasks".
- **Ctrl+F** finds tasks by name, notes, quantity, Activity ID or custom column, and opens collapsed phases to show a match.
- **Shift+F2** opens **Crew & equipment...** for the active row — see [Crew planning](#) and [Equipment on tasks](#).
- Copying, pasting from Excel and the fill handle are on [Copy, paste and fill](#). Every key is on the [keyboard shortcuts page](#).

Company columns

Columns your company defines once — a name, a type and its choices — that planners add to any project, and that crews see in the field.

Company columns are column definitions your company keeps in one list, so every project can use the same ones — a *Supplies* column, an *Inspection* checkbox, a *Trade* dropdown. The company sets each column's name, type and choices once; the values planners type stay in each project.

Where to find it

- *To manage the list:* open **Company** from the sidebar, go to Standards, and find the **Company columns** card. It reads: "Column definitions your planners can add to any project. The values typed in a project stay in that project." **Manage...** opens the list. See [The Company page](#).
 - *To use one in a project:* right-click any column header in the grid → **Add or show columns...**, and look under **Add from company library**.
-

The company's list

Each definition has a name and one of the four [custom column types](#) — [text](#), [checkbox](#), [dropdown list](#) (with its options) or [symbols](#). The type and a dropdown's options are set when the column is added; after that, the type can't change, and the name can be changed with **Rename...**

Retire takes a column off the list for new projects, and **Restore** puts it back. The dialog's banner says what that means: "Adding a definition to a project copies it. Renaming or retiring it here does not change projects that already use it."

A new company's card is empty and offers **Add the Supplies column** — a text column for the materials a crew needs on site.

Adding one to a project

In **Add or show columns...**, the **Add from company library** section lists the company's active columns, filtered by the same search box as the rest. Adding one copies the definition into the project's own columns, where it is tagged **Company library**. The values live in the project itself, so retiring the company column later only stops it being offered — it never hides anything already typed.

If the list can't load, the section says "Couldn't load the company library — reopen to retry."

What crews see

A company column that is text or a dropdown list also shows in the task details a crew opens in the field, as a read-only line under the dates, labeled with the column's name — for example `Supplies 2 pallets 5/8" ply, 40 bags mix`. See [Work, My tasks and the calendar](#).

The *name* is the company's; the *values* are whatever the planner typed. Rename or retire the company column and the line stops appearing the next time the crew's view loads. A column made only for one project — never added from the company library — is not shown to crews on screen.

Who can use it

A company admin manages the list on the Company page. Admins and Editors add company columns to the projects they edit. See [Who can see and do what](#).

Good to know

- A company can have up to 100 company columns ("The company column list is full (100)"). Names are 1 to 60 characters, and a name already on the list — even with different capitals — is refused ("That column definition is already on the list").
- Keeping a project-only column off the crew's screen is a matter of display, not security: a Field account still receives the project's columns. Don't use a column to keep information from your crews.
- A project template keeps whatever columns its source project had, company columns included, like any other column. See [Project types and project templates](#).
- To add a column just for one project, use **Add column** at the foot of the same picker — see [Editing in the grid](#).

Copy, paste and fill

Copy and paste tasks with their links, paste a block from Excel, paste it as new tasks, and fill a series down with the fill handle.

The grid's clipboard works the way Excel does, so what you already do in a spreadsheet works here too.

Where to find it

In the editor's grid: the usual keys, or right-click a row for **Copy**, **Cut**, **Paste** and **Paste as new tasks**.

Copying and pasting tasks

Select rows and press **Ctrl+C**, **Ctrl+X** or **Ctrl+V**. Tasks you copy inside Gantry paste below the selected row, at its outline level. Links between the copied tasks are kept and point to the new copies; links to tasks outside the copied set are dropped. This works across projects and browser tabs.

Every copy also lands on your computer's clipboard as a plain table, ready to paste into Excel or an email.

Pasting from Excel

A block copied from Excel lands cell by cell, starting at the *active cell* — columns map across the grid from that column, rows walk down, and the block *overwrites* what is there. Click the cell in the column where the block should start — say your Biditem Number column — and the copied columns fill across from there.

Rows that run past the bottom of the project become new tasks. Blank cells and values that can't be read skip their target instead of clearing it. The whole paste is one **Ctrl+Z**.

Paste as new tasks

Right-click → **Paste as new tasks** adds the block as new rows below the selection instead of overwriting, with the same column mapping.

The fill handle

The small square on the active cell drags down, as in Excel. Select cells holding **1** and **2** and drag to get 3, 4, 5. "Area 01" continues as Area 02, Area 03 — even from a single cell. A single plain number or text value repeats. It works in any column you can edit.

Who can use it

Admins and Editors, in the editor. See [Who can see and do what](#).

Good to know

- Pasting and filling still work while a filter is on — see [Filters, saved views and the 3-week lookahead](#).
- To bring a whole spreadsheet in as a project, use the import wizard instead — see [Importing a project](#).

Scheduling: durations, links, dates and float

How Ganttry works out your dates — durations, links and lag, constraints and deadlines, work calendars, float and the critical path.

Ganttry is a critical-path scheduler: you say how long each task takes and what it waits for, and Ganttry works out every start and finish date from those durations, the links between tasks and your work calendars. It follows Microsoft Project's rules.

This page covers building the logic. Recording what actually happened is on [Progress tracking and the Projects page](#); comparing dates against a baseline is on [Baselines and variance](#), and comparing a version saved in History with today's plan is on [Saving, history and opening projects](#); budgets are on [Cost loading and cash flow](#).

Where to find it

- In the grid: the [Duration](#), [Predecessors](#), [Start](#) and [Finish](#) columns, and more you can show from **Add or show columns...** (right-click any column header).
- Right-click a row → **Constraint & deadline....**
- **Tools ▾** → **Calendars...** for work calendars.
- **Project settings** (click the project name) for the project start date, the critical threshold and how Activity IDs show.

Durations

A duration is how long a task takes, in [working days](#) unless you say otherwise:

You type	It means
5 or 3.6	working days
5d	working days, with the unit written out
2w	weeks — multiplied by the working days in your workweek
36h	hours — converted at the calendar's hours per day, and remembered as hours
0	a milestone — a zero-length marker such as "Notice to proceed"

The [Hours](#) column shows each task's duration times the hours per day; a summary adds up its subtasks. You can type into it too — hours convert to days at the calendar's hours per day.

Hours per day

Set the hours in the calendar: **Calendars...** → **Hours per weekday** — 8 for five 8-hour days, 10 for four 10-hour days (and clear Friday).

Round durations entered in hours up to full days decides whether durations typed in hours round up to whole days. Turned off, **36h** at 10 hours a day schedules as exactly 3.6 days, and the next task can start the same day.

A task you entered in hours keeps its hours: a **36h** task scheduled as 5 days still shows 36h. Change the hours per day and tasks entered in hours reschedule, while tasks entered in days keep their days.

Predecessors, link types and lag

The Predecessors column says which tasks must come before this one, using Microsoft Project's shorthand: the other task's row number, an optional link type, and an optional lag.

You type	It means
12	finish-to-start (FS): task 12 finishes, then this one starts — the normal case
12SS	start-to-start: this can start once 12 starts
12FF	finish-to-finish: this can't finish until 12 finishes
12SF	start-to-finish: this can't finish until 12 starts (rare)
12FS+3d	starts 3 working days after 12 finishes
14SS-2d	starts 2 working days before 14 starts (a lead)

Separate several links with commas. When you insert or delete rows, the numbers in every link renumber automatically. **Ctrl+L** links the selected tasks finish-to-start, and on the Gantt you can draw a link by dragging from the end of one bar to another — see The Gantt chart.

Successors

The Successors column is the same links seen from the other end, kept in step for you. Type **14SS+2d** into task 5's Successors and task 14's Predecessors gains **5SS+2d** ; remove it on either side and the other side goes too. Both columns take the same shorthand — they are one set of links, not two.

WBS and Activity IDs

Both columns start hidden; show them from **Add or show columns....**

- WBS is the outline number — `1`, `1.1`, `1.1.2` — worked out from where the task sits, so it changes when tasks move.
- Activity ID is a stable code you can edit, in P6's style (`A1000`, `A1010` ...). New tasks get one automatically and keep it when they move. To renumber the whole project from a prefix, a start number and a step, right-click the Activity ID header → **Renumber activity IDs....**

In Project settings, **Show Activity IDs in Predecessors / Successors** makes those columns show IDs instead of row numbers. Either way, you can type a row number or an Activity ID. Activity IDs come in from an import, and `Ctrl+F` finds them.

Dates

- Typing a Start date pins the task: it sets a *Start No Earlier Than* constraint, shown by 📌. To remove the pin, empty the Start cell (`Delete` clears it).
- Typing a Finish date changes the duration to fit.
- Editing any date cell — Start, Finish, Deadline, Actual Start or Actual Finish — opens a small calendar under the cell. Click a day to use it; that task's non-working days are dimmed. Typing still works: `3/4`, `Mar 4`, `4 Mar`, `3/4/26`, `Mar 4 2026` and `2026-03-04` all read correctly, and the calendar follows what you type. `Esc` cancels the edit.
- A date typed without a year takes the year nearest the task's own date: its start for Start and Actual Start, its finish for Finish, Deadline and Actual Finish. A row with nothing typed in it yet goes by the nearest row above that has dates, or by today if there isn't one — so a date more than six months away needs its year. A Finish before the task's start, or an Actual Finish before its Actual Start, is refused, as it is with its year typed; a Deadline before the start is kept, and shows as missed. A day that doesn't exist, such as `Feb 30`, is refused.

Tasks with no predecessors or constraints start on the project start date, set in Project settings.

Constraints and deadlines

Right-click → **Constraint & deadline...** sets one of four constraint types, plus a separate deadline:

Type	What it does
Start No Earlier Than (SNET)	the task starts on the date or later — what typing a Start date, or dragging a bar, sets
Must Start On (MSO)	pins the start to the date, even against its predecessors; a conflict is flagged
Finish No Later Than (FNLT)	moves nothing; a finish past the date shows negative float and is flagged
Must Finish On (MFO)	moves nothing; a finish that isn't exactly on the date, early or late, is flagged

A **Deadline** never moves a date. It is a target finish you want to watch: if the task can't finish by it, its float goes negative, and once it is missed the task and its Deadline cell turn red. Use deadlines for contract dates you need to see slipping early.

On screen, a broken constraint shows a red  beside the row and a red outline on the bar. A deadline draws a diamond on the Gantt — green when met, red when missed. The [Constraint](#) and [Deadline](#) columns start hidden; once shown, they go into CSV, Excel and PDF exports, and the PDF draws the deadline diamonds and their key. **Remove constraint** on the right-click menu clears a constraint.

Once a task has actual dates, its constraints no longer apply — what happened wins — though a deadline still flags a late finish. A task with an actual finish never shows the constraint warning (the red .

Calendars

Tools ▾ → Calendars... (or **Working calendar → Calendars...** in Project settings) opens the project's calendars. Opened from Project settings, it has a **← Project settings** button back.

A project can have several named work calendars — "5-day", "6-day paving crew", "In-water window" — each with its own:

- working weekdays and hours per day;
- holidays, which can repeat every year and can carry a name;
- working exception days — single days worked that would otherwise be off;
- recurring shutdown periods, such as "Winter shutdown: 12-15 → 03-15 (ends next year)", which repeat every year and may run over the year end. A working exception day still counts as worked during a shutdown.

5x8 Mon–Fri and **4x10 Mon–Thu** set the workweek and the hours in one click, leaving holidays and shutdowns as they are. **Add US federal holidays** adds the 11 federal holidays for a range of years, by

name. A holiday that falls on a weekend is observed on the nearest weekday — "2026-07-03 — Independence Day (observed)" — and the real date is marked too, so a Saturday crew doesn't work it. Delete any your contract doesn't recognize. Names are only labels; the dates alone drive the schedule.

Signed in to a company account, the calendar editor also has **Save as a calendar standard...**, which keeps the calendar as one of your company's reusable standards — see [Company calendar standards](#).

To put a task on a calendar, show the [Calendar](#) column and pick one; blank means the project's default. The task's bar then spans its own working days (a 6-day crew works Saturdays), hours convert at its hours per day, and its float and variance are counted in its working days. A link between tasks on different calendars hands over at the right point in the day, and lag counts working days on the calendar of the task that follows (the successor).

Three things still follow the project calendar, not each task's: weekend shading on the Gantt and in the PDF, the crew histogram, and the hour weighting on the Projects page.

Float and late dates

Four read-only columns, hidden until you show them:

- [Total Float](#) — how many working days a task can slip before the project finish, or a deadline or constraint, slips.
- [Free Float](#) — how far it can slip before it delays the next task.
- [Late Start](#) and [Late Finish](#) — the latest dates that still protect the finish.

They go into CSV, Excel and PDF exports once shown. Negative float — from a deadline or finish constraint the chain of tasks can't meet — shows red everywhere.

The critical path and the critical threshold

The [critical path](#) is the chain of tasks with no float to spare: delay one, and the project finish (or a deadline or constraint) slips. The **Critical** button on the toolbar highlights it on the Gantt.

In Project settings, **Critical total float (working days)** sets the [critical threshold](#). At 0, the default, you see the classic critical path. Raise it — to 5, say — and near-critical work with a little float left lights up too, so you see trouble coming. The Critical button, the Gantt's red tint and the PDF all follow the threshold. A task with an actual finish is never critical.

Who can use it

Admins and Editors build and change the logic in the editor. A Field account sees the resulting dates in My tasks and Work, but never changes the logic. See [Who can see and do what](#).

Good to know

- A summary's dates come from its subtasks — see [Editing in the grid](#).
- Links, durations, constraints, deadlines and calendars all go out to MS Project in the XML export — see [Print and export](#). Links, durations, constraints and calendars come in from MS Project and P6 files; deadlines come in from MS Project only — see [Importing a project](#).
- Tasks that work only some days of the week, or pause and restart, are on [The Gantt chart](#).
- A calendar holds up to 24 recurring periods, and at least one weekday must be a working day.

Baselines and variance

Save up to five named baselines, choose the active one, and see how far each task has slipped against it in the grid, on the Gantt and in exports.

A [baseline](#) is a snapshot of your plan — every task's and summary's dates and duration — saved so you can compare the live schedule against it later. Ganttry keeps up to five named baselines per project, and one of them is the *active* baseline that the variance columns and the Gantt's gray bars measure against.

Where to find it

Click the project's name in the top row to open **Project settings**, and find **Baselines**. The toolbar's **Baseline** button picks which one the Gantt draws.

Saving a baseline

Press **Save baseline...** and give it a name — Ganttry suggests *Baseline 1*, *Baseline 2* and so on. It snapshots the plan as it stands and becomes the active baseline.

Save one before your first progress update, so every later update has something to measure against — see [Progress tracking and the Projects page](#).

Managing baselines

Each saved baseline is listed with its name, the date it was set and how many tasks it holds:

- The round button beside it makes it the active baseline.
- **Rename** changes its name.
- **Replace with current plan** re-takes it from the schedule as it stands now.
- With rows selected in the grid, a second button replaces just those tasks and their subtasks.
- **Delete** removes it, after asking. Deleting the active baseline makes the most recent remaining one active.

Every one of these is a single undo step. With five saved, **Save baseline...** is grayed out until you delete one.

Variance in the grid

The active baseline drives two read-only columns, [Start Var](#) and [Finish Var](#). They start hidden; show them from **Add or show columns...** (right-click any column header).

Both count working days, with Microsoft Project's signs: *positive* means the task has slipped (shown red), *negative* means it is ahead (shown green). A row that finishes later than the active baseline also gets a red row number.

Once you record progress — a data date and actual dates — the variance reads as plan against actual, with nothing to change.

Baseline bars on the Gantt

The active baseline draws as gray bars under the live bars, on screen and in PDFs. The toolbar's **Baseline** button switches which baseline is drawn, or turns them **Off**.

Point at a bar and its tooltip always gives dates and variance against the *active* baseline. When you draw a different one, the tooltip adds a dates-only "Drawn" line for it.

In exports

- The variance columns go into CSV, Excel and PDF once they are shown.
- The PDF dialog has **Baseline (planned) bars**, and, with more than one baseline, **Baseline shown** to pick any of them.
- The MS Project XML export sends the active baseline as MS Project's Baseline 0. It goes one way: importing that file back does not bring baselines in.
- With costs on your tasks, the cash-flow chart adds a baseline curve — see [Cost loading and cash flow](#).

Who can use it

Admins and Editors save and manage baselines in the editor. See [Who can see and do what](#).

Good to know

- A baseline keeps dates and durations only, for the variance columns and the gray bars. To keep the whole plan as it is now, choose **Save a version...** from the save chip or **Tools ▾**: History keeps it by name, and you can look at it, compare it with today's plan or restore it. **Make a copy...** makes a separate project, without bookings or assignments. See [Saving, history and opening projects](#).

- Baseline names can be up to 60 characters.

Cost loading and cash flow

Put a budget on each task with the Cost column, and Ganttry spreads it over the work to draw your planned, earned and baseline cash-flow curves.

Give each task a budgeted amount and Ganttry turns the schedule into a cash-flow forecast: it spreads each task's cost across the days it is worked and adds the results up month by month. The same numbers show what you have earned so far against what you planned.

Where to find it

- The Cost column in the grid. It starts hidden: right-click any column header → **Add or show columns...** to show it.
 - **Tools ▾** → **Cash flow...** for the chart and the monthly table.
-

Entering costs

The Cost column holds one budgeted lump sum per task. Type `12500` or `$1,234.56` — commas and a dollar sign are fine.

Costs belong on the tasks that do the work, not on summaries: a summary row shows the total of the tasks under it, and you can't type into it.

The cash-flow chart

Tools ▾ → **Cash flow...** spreads each task's cost evenly across its working days and charts three running totals as an S-curve, with a marker for today:

- *Planned* — cost spread over the tasks' current dates;
- *Earned* — cost times each task's % complete;
- *Baseline* — cost spread over the active baseline's dates, when the project has a baseline (see [Baselines and variance](#)).

Under the chart, a monthly table lists the planned, earned and baseline amounts with their running totals, and the budget and earned totals at the foot. The line above the chart gives the budget and what has been earned to date, as a percentage.

With no costs entered yet, the dialog says so and offers **Show Cost column**.

A task with a work pattern — work only on some days of the week — counts only the days actually worked. See [The Gantt chart](#).

In reports and exports

- *Excel*: once any task has a cost, the Excel export gains a second worksheet, **Cash flow**, with the monthly planned, earned and baseline amounts in currency format — whether or not the Cost column is shown. It always covers the whole project, even when you export a filtered view.
 - *PDF*: the export dialog's options include **Cash flow page**, which appends the cash-flow page. It appears only when tasks have costs.
 - *Reports*: the Cash Flow report on the Reports page opens the same dialog for any project — see [Reports](#).
 - *Dashboard*: a project's Dashboard shows the cash-flow S-curve when its tasks carry costs — see [The project Dashboard](#).
 - *Imports*: a CSV or Excel import can bring costs in — a Cost, Amount, Total or Budget column maps to Cost. See [Importing a project](#).
-

Who can use it

Admins and Editors enter costs and open the cash-flow chart. *Field accounts never see costs*: task costs are taken out of everything a Field account receives. See [Who can see and do what](#).

Good to know

- Costs don't go out in the MS Project XML export, and a re-import that updates a project in place never touches them — see [Print and export](#) and [Importing a project](#).
- The spread is even: each working day of a task gets an equal share of its cost.

Colors and text

Style rows with bold, italic, underline, strikethrough, text color and size, and tint tasks with named color tags that carry into the Gantt, PDFs and Excel.

You can style the text of any row and give tasks named color tags — "Concrete", "Sub: electrical" — so the schedule reads at a glance. The styling shows the same on screen, on the Gantt and in what you print or export.

Where to find it

Select one or more rows, then open **Format ▾** on the toolbar, or right-click → **Color & text....**

Text styles

Format ▾ toggles **Bold**, **Italic**, **Underline** and **Strikethrough** on the selected rows; **Ctrl+B**, **Ctrl+I** and **Ctrl+U** do the first three. If every selected row already has the style, the toggle turns it off.

Color & text... adds a text color and a size — Small, Normal or Large — and **Default** resets a row's text style.

Styles apply in the grid, on the Gantt's bar labels, and in PDF and Excel output alike. Strikethrough is handy for showing work that has been taken out of scope without deleting it.

Color tags

The same dialog creates named color tags and applies them to the selection: pick a color, type a name, and press **Add & apply**. Click a tag to apply it, use  to rename or recolor it, and X to delete it (the tasks lose it). **Remove color** clears the tag from the selected tasks.

A tagged row:

- tints the whole grid row, with a stripe at its edge (the blue of a selection still shows over it);
- colors its bar, milestone or summary on the Gantt and in PDFs, with the tag names listed in the key;
- tints its row in Excel exports.

Renaming or recoloring a tag restyles every task wearing it. While the **Critical** highlight is on, critical-path red wins over tag colors.

How it prints

- In the PDF dialog, **Task colors** turns the tag colors on the bars on or off, and **Color table rows by task color** washes each table row with its tag's color — in table-only prints too, where the key then lists the tag names. See [Print and export](#).
- Filters can pick tasks by color tag, or tasks with no tag — see [Filters, saved views and the 3-week lookahead](#).

Who can use it

Admins and Editors, in the editor. See [Who can see and do what](#).

Good to know

- Color tags belong to the project. A company can set standard color tags that new projects start with — see [Creating a project](#).
- **Format ▼** also holds **Header row** — see [Editing in the grid](#).

The Gantt chart

The Gantt chart beside the grid — dragging bars, zooming, reading the tooltip, splitting a task, work patterns, the crew histogram and baseline bars.

The Gantt chart draws your schedule as bars on a timeline, beside the grid. It is live: change a duration or a link in the grid and the bars move; drag a bar and the grid changes to match.

Where to find it

Open a project in the schedule. The chart sits to the right of the grid; the pane toggle in the top row shows the grid only, both, or the chart only. On a phone, the editor shows one at a time.

Moving, stretching and linking bars

- *Drag a bar* to move the task. This pins its start: it sets a *Start No Earlier Than* constraint, like typing a Start date. See [Scheduling](#).
 - *Drag a bar's right edge* to change its duration.
 - *Drag from just past the end of a bar* onto another bar to link them finish-to-start.
-

Zooming and moving around

Hold **Ctrl** and scroll over the chart to zoom the timeline. The toolbar has zoom out and zoom in, **Fit** (the whole project in the window) and **Today**. See [The editor's toolbar](#).

What the bars show

Point at a bar for its dates, duration, % complete, float, constraints and baseline.

On the chart you will also see:

- the critical path in red while the toolbar's **Critical** button is on — see [the critical threshold](#);
- a red outline on a bar whose constraint can't be met, and deadline diamonds — green when met, red when missed;
- task colors from color tags — see [Colors and text](#);
- the blue [data date](#) line once you record progress — see [Progress tracking and the Projects page](#);
- gray baseline bars under the live bars, when a baseline is drawn.

Baseline bars

The toolbar's **Baseline** button chooses which saved baseline draws under the live bars, or turns them off. The tooltip always compares against the *active* baseline, and adds a "Drawn" line when you draw a different one. See [Baselines and variance](#).

Splitting a task

When work stops and restarts, split the bar, as in MS Project: right-click the bar where the work pauses → **Split task here**. The bar splits into pieces joined by a dotted line, and you can split it as many times as you need.

- Drag any piece after the first to lengthen or shorten its pause; shrink the pause shut to join the pieces again.
- Dragging the first piece moves the whole task. The pieces keep their shape when predecessors push the task later.
- Pauses are working days on the task's own calendar. The next tasks wait for the last piece, and progress fills the pieces in order.
- Splits print in the PDF and show in the tooltip.
- **Remove splits**, on the bar's or the row's right-click menu, clears them. From the grid, the row's right-click menu also offers **Split task (click the bar)**.

A task needs at least two days' duration to split. Once a task is in progress it draws as one solid bar, but its dates still allow for the pauses in the work that remains.

Work patterns

Some tasks only happen on certain days — a crew on site Mondays only, or three days a week. Right-click → **Work pattern...** and choose:

- **Only these weekdays** — for example *Mondays only* or *Mon+Wed*;
- **First working days per week** — the first N working days of each week, so a Monday holiday moves the crew to Tuesday and Wednesday on its own.

The task keeps its duration in working days but works only on the days you allow. The Gantt draws the weekly pieces joined by a dotted line, and the next tasks wait for the last piece. The crew histogram, the crew and equipment reports, the cash flow and the planned percentage all count only the days actually worked.

A [Work Pattern](#) column (hidden until you show it) shows the pattern in the grid and in exports. Patterns combine with splits, and the tooltip shows both.

The crew histogram

The toolbar's **Crew** button shows a band under the chart with one stacked bar per working day, colored by trade — each trade keeps its color everywhere, on the band, in Crew planning and in the PDF. The band scrolls and zooms with the chart.

- Its scale fits the busiest day, with labeled gridlines, and when the days are wide enough each bar shows that day's total headcount.
- Crew you still need — entered with a  — draws as a striped segment.
- When the project's crew availability is set, days where demand is higher than supply get a red shortfall strip.
- Point at a day for the breakdown by role.
- Drag the band's top edge to make it taller; tall enough, it gains a legend.
- The ↗ button, or **Tools ▾ → Crew planning**, opens [Crew planning](#).

The band follows what is on screen — collapse a phase and its crew drops out — and your browser remembers whether it is on for each project.

Who can use it

Admins and Editors, in the editor. A Field account never opens the editor. See [Who can see and do what](#).

Good to know

- Weekend shading, and the crew histogram, follow the project's calendar even when a task has its own — see [Scheduling](#).
- Everything here prints: see [Print and export](#) for the PDF's chart options, including the crew histogram.

Filters, saved views and the 3-week lookahead

Narrow the grid and Gantt to the work you care about — the one-click 3-week lookahead, combined filters, and saved views — and print or export just that.

Filters narrow what the grid and the Gantt show, so you can look at just the next three weeks, one crew's work, or what is about to turn critical. A filter only changes *your* view: the project itself is untouched, teammates keep seeing everything, and filtering never counts as a change to the project.

Where to find it

The **Views** button on the editor's toolbar — the funnel — opens the menu. It stays on the toolbar on a phone too.

The 3-week lookahead

3-week lookahead is one click: it shows the work that isn't finished and overlaps the next 21 days — the superintendent's view. Click it again, or any ticked saved view, to clear the filter. See the [lookahead](#) in the glossary.

Filter...

Filter... opens **Filter tasks**, where you combine criteria. A task must match every one you set:

- **Text** — name, notes, quantity or Activity ID.
- **Crew** — a crew role, such as *operator*.
- **Equipment** — an equipment type, such as *excavator*.
- **Progress** — **Complete**, **Ahead**, **On track**, **Behind** or **Upcoming**.
- **Color** — one or more color tags, or **No tag**.
- **Dates** — a fixed date range, or **Next days** — a rolling window of the next so many days from today.
- **Near-critical** — total float at most so many working days: the "what's about to become critical" view. 0 shows the critical path only.
- **Hide completed tasks**.
- **Unstaffed crew only** — tasks with crew still needed, entered with a . It is the hiring-needs view.

Clear filter on the Views menu takes the filter off.

What you see under a filter

- Matching tasks stay in their outline: their summary rows still show, in gray in the grid and faded in the Gantt, and each matching row shows a small mark beside its number.
- Row numbers keep their real numbers, so gaps show where rows are hidden, and the status bar reads "N of M tasks (filtered)".
- A filter overrides collapsing: matching work inside a collapsed phase shows, and the collapse arrows do nothing until you clear the filter.
- Editing still works — cell edits, indenting, pasting, the fill handle and changes to many rows at once. Filter, press **Ctrl+A**, then edit them all together.
- Moving rows — dragging or **Alt+↑** and **Alt+↓** — is switched off, because rows next to each other on screen may not be next to each other in the schedule. Dragging a row number says "Clear the filter to reorder tasks".
- **Ctrl+F** finds only visible rows while a filter is on.

Saved views

Save current view... names the current filter, the columns you are showing and the Gantt's zoom as a one-click saved view. Saved views appear in the Views menu; pick one to apply it, and pick it again to clear its filter. With a saved view applied, the menu also offers to delete it.

Signed in to a company account, your saved views follow your account to any device; without one, they stay in that browser. The filter itself also survives a reload, for each project.

Printing and exporting a filtered view

With a filter on, the PDF dialog gains *Print filtered tasks only*, with a count such as *(12 of 80)*. It is on by default, and it starts the date range from the filter's window — so lookahead → **PDF...** gives a one-page lookahead sheet cropped to those three weeks. A project in Draft prints with a "DRAFT — not published to crews" line.

The CSV and Excel exports ask the same question in a small dialog, also on by default. Exported rows keep their original row numbers. The Excel cash-flow sheet always covers the whole project, and the MS Project XML export is always the complete project — MS Project needs every task and link. See Print and export.

Who can use it

Admins and Editors, in the editor. Each person's filter and saved views are their own. See [Who can see and do what](#).

Good to know

- There is no sorting or grouping, on purpose: the order of tasks *is* the schedule — it drives the row numbers in links and where a dragged row lands — and the outline is the grouping.
- The Reports page has its own crew and equipment lookahead across projects — see [Crew and equipment reports](#).

Saving, history and opening projects

Ganttry saves as you work, keeps named versions and automatic saves you can look at, compare and restore, holds every project in one library, and never overwrites a teammate's save silently.

You never have to press Save in Ganttry. It saves your project as you work, keeps earlier plans you can look at, compare with today's and go back to, and keeps all your projects in one library. When you want to keep the plan as it stands under a name — before a big rework, say — you save a version. When two people change the same project at once, it shows you both and lets you choose — nothing is ever overwritten without you knowing.

Where to find it

- The save chip, on the right of the top row: **Save now**, **Save a version...** and **History...**
 - **Tools ▾** → **Save a version...** or **History...**
 - On the [Company page](#)'s Overview, **History...** on a project's row opens that project with its History.
 - Your projects: **File ▾** → **Open project...** (`Ctrl+O`) opens the **Open a project** page, and each row on Home or on that page has a `⋮` menu of its actions.
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Saving

Saving is automatic: about half a second after you stop typing, the project saves. The save chip shows where it stands — "● Unsaved changes", then "... Saving", then "✓ Saved 1:21 PM". Click the chip for **Save now**, **Save a version...** and **History...**; when it reads "⚠ Another version saved — review", a click opens the review described below.

On the Work page, progress updates save as soon as you record them.

Save a version

Save a version... keeps the whole plan as it is now, under a name, in History: its tasks with their dates, links, crew needs and bookings. Choose it from the save chip, from **Tools ▾**, or at the top of History.

It saves your newest edits first, then shows *What's saved* — the number of tasks and the day the plan finishes. Give it a **Name** of up to 40 characters, add a note of up to 500 if you like, and press **Save**. The status bar reads `Saved "Plan A" in History`.

- Each saved version of a project needs its own name; letter case and extra spaces don't make a name new. Names starting with "the plan from before" are kept for the plans a restore saves.
- A project keeps 20 saved versions. At 20, the dialog says so and saves nothing; delete one in History, then save again.
- Saved versions stay until someone deletes them, or until the project itself is deleted.
- If a teammate saved the project after the dialog opened, **Save** says so and shows the plan with their change; press **Save** again to keep that.

History

History... lists the project's earlier plans in two lists, newest first, under a line with the project's task count and finish today.

- **Saved versions** — the versions people saved by name, with a count such as "3 of 20". Each row shows the name and note, who saved it, when, the day it finishes and its number of tasks. The "Before restoring ..." rows a restore saves (below) are in this list too, but don't count toward the 20.
- **Automatic saves** — the plans Gantry saved as people worked: "the last 30 · a new one every 5 minutes, or when someone else saves". Each row reads "Revision" and a number, the newest marked *latest*, with when, by whom and the number of tasks. Older ones roll off as new ones come.

Every row has **Look**, **Compare with now** and **Restore...**; its ⋮ menu holds the rest:

- **Keep this one...** — on an automatic save or a "Before restoring ..." row: names it and makes it a saved version, so it stays. It counts toward the 20.
- **New project from this** — makes that plan a separate project, named after the version (such as "Bridge 12 (Plan A)"), and opens it. The copy has no bookings and no one on Assigned To; the status line says so.
- **Rename...** — changes a saved version's name or note.
- **Delete...** — removes a saved version or a "Before restoring ..." row for good, after asking. Only the person who saved it, or an admin, can delete it; for anyone else it is grayed, and says who can.

On a phone, tap a row for its actions.

Look and Compare with now

Look opens a version read-only over the editor, under an amber band that names it — "Plan A · Saved Sep 29, 4:40 PM by Dana Ruiz" — with **Compare with now**, **Restore...** and **Close**. You can scroll,

select, collapse and expand rows, copy, switch panes, and fit or hide columns; nothing you do there edits or saves anything. A row's right-click offers only **Collapse** (or **Expand**) and **Copy**, and **Tab** moves focus on instead of indenting. **Close** or **Esc** returns to the editor exactly as you left it.

Compare with now sets the version against the plan on your screen, unsaved edits included. It shows each plan's finish and the working days between them first, then the tasks that moved, the tasks added and removed since, how the bookings differ, and any change to shared coverage. On a wider screen, **Show every change, field by field** lists the rest. To write up what changed between two progress updates, see [Schedule update narrative](#).

Restoring a version

Restore..., on a row or in Look's band, changes nothing until you confirm; nor does the button at the foot of Compare, which names the version ("Restore Plan A...", or "Restore the earlier plan..." on a "Before restoring ..." row). Each opens a confirm, "Restore Plan A?", which saves your newest edits, reads today's plan and lists what the restore does:

- **Kept from today** — on the tasks in both plans, today's bookings (while **Keep today's bookings** is ticked) and everything recorded on them: progress, actuals, checklists and attachments, whether a crew or the office entered them, and the office's notes. A restore never takes back a crew's record.
- **Kept because it has progress, a checklist tick or an attachment** — a task only in today's plan stays when it has progress, a status other than **To do**, an actual date, remaining days, a ticked checklist item or an attachment, whoever entered it. A note alone doesn't keep it.
- **Comes back unbooked** — tasks only in the version return without the people and machines booked or assigned on them, who may be busy elsewhere by now; People shows them as needing people.
- **Dropped · only in today's plan** — the other tasks only in today's plan go, with their bookings and their notes.

It also says how the finish moves, and lists any shared coverage that changes. **Keep today's bookings** is ticked each time it opens. Untick it to bring back the bookings and Assigned To the version had instead; the confirm then lists today's bookings that go and the version's that come back. Progress, actuals, checklists, notes and attachments stay either way.

Before it restores, Gantry saves today's plan as "Before restoring Plan A", and the confirm says so. Unless **Switch to Draft first** is picked on a Live project (below), the button names the version; press it and the project takes the restored plan at once. The status bar reads **Restored Plan A · today's plan is in History**.

Undoing a restore

A restore can't be undone with `Ctrl+Z`: undo starts over. To go back, restore the "Before restoring Plan A" row. Its confirm asks "Restore the plan from before Plan A?", the tasks it brings back keep the bookings they had (**Comes back with its bookings**), and its button is **Restore the earlier plan**. That restore saves a "Before restoring ..." row of its own, so it can be undone too.

A project keeps the newest 3 "Before restoring ..." rows. **Keep this one...** makes one a saved version that stays.

Live projects

Every project is Live unless it is in Draft, and crews see a restore of a Live project at once — on crew links, itineraries and field phones. So restoring a Live project takes Master planning, which company admins have by role. For them the confirm opens with **Switch to Draft first** picked: the project goes to Draft, crews keep today's plan until someone publishes, and the button reads **Switch to Draft and restore**. After it, the status bar reads `Bridge 12 is in Draft · Restored Plan A · today's plan is in History`. **Restore now** restores it with crews seeing it at once.

Anyone else still gets **Restore...** and can read what it would do, but the confirm says "Only an admin or a master planner can restore a Live project." and who to ask. Any Admin or Editor can restore a project in Draft.

In Training, a student's copy, the class board and the projects students create there need no one: anyone who can edit them restores them, and the confirm says that anyone with a link to the project sees the restore at once. A project a course uses as its template or answer key can't be switched to Draft, so its confirm never offers **Switch to Draft first**.

Opening and managing projects

Every project is saved in Gantry, and Home lists them all. **File ▾ → Open project...** (`Ctrl+O`, from the editor or any page) opens the **Open a project** page: Home in an opening mode, with the search box ready. Type part of a name and press Enter to open the top match; press Enter on an empty box to open the most recent project that isn't open, or Esc to go back. Without an account (on this computer only, or in the demo) this page is where your projects are listed.

Each row on Home or on the Open a project page ends with `⋮`, the row's menu. Right-click a row, or press Shift+F10 or `⋮` on it, for the same menu. From it you can:

- **Open** the project (**Back to this project** on the one that's open);
- **Make a copy...** under a new name, leaving the original exactly as it is (the open project copies as it stands on screen). The copy has no bookings and no one on Assigned To, and the status line says which it left out;

- **Save as a project template...**, signed in, for a project you can add to — see [Project types and project templates](#);
- **Move to group...**, signed in, to put the project in another of your company's groups, where you're allowed to. It reads "This project can't be moved to another group." where you can't. See [Companies, groups and roles](#);
- **Rename...** the project. A rename is an edit like any other, and the box says what crews see: on a Live project they see the new name at once; on a [Draft](#) project they keep seeing the published name until you publish. A name another project already has asks first;
- **Archive** a finished project — archived projects are hidden until you tick **Show archived** in the **Sort** ▾ menu, and **Unarchive** brings one back;
- **Delete...** a project for good, where you have the right. It asks first, and warns that this can't be undone. Its History goes with it.

A Field account's rows have no Archive, Move or Rename.

Import... on Home, or **File ▾ → Import file...**, adds files (see [Importing a project](#)), and **Ctrl+S** saves the open project to a file on your computer.

When someone else saved first

Signed in, every save checks whether someone else saved the same project first. If someone did, a review opens — *another version was saved* — showing exactly what differs, field by field, and you choose:

- keep their version;
- keep yours, replacing theirs — except for progress you hadn't seen, such as a crew's report (below);
- **Save yours as a separate copy**: their version takes over this project, and yours becomes a new project in the library without its bookings or assignments. The status line ends **• the copy has no bookings or assignments** — or names only the bookings, or only the assignments, by what yours held;
- or **Decide later**.

The review's table lists every task that only one of the two versions has, under a count such as **1 changed field • 27 tasks only in theirs**. The table scrolls on its own, so the choices under it stay where they are. Past 80 changed fields, it gives the rest as a count, such as **...and 12 more changed fields**.

Keep yours keeps progress you hadn't seen

While you edited, someone may have changed a task's progress and status, ticked a checklist item or added an attachment: a crew reporting from the field, or someone in the office. If you hadn't changed that part of the task, keeping yours keeps their change. The review says so before you choose, and names each task's change after whoever changed that task last.

- When Gantry can tell the change came from the crew, the review calls it a crew report: **Keep yours also keeps Sal Rinaldi's crew report on Crew task 3 (east): 50%, In progress.** The button reads **Keep yours (with Sal Rinaldi's report)**.
- Otherwise it is a progress update: **Keep yours also keeps Dana Ruiz's progress update on Crew task 4: 20%, In progress.** The button reads **Keep yours (with Dana Ruiz's update)**.

After it, the status line says what was kept, such as **Your version saved, with Dana Ruiz's progress update kept (theirs stays in version history)**.

Where both of you changed the same part of a task, the later change wins, and the review says which before you choose, such as **Your 30% on Crew task 4 stays. It is newer than Sal Rinaldi's 50%.** "Later" means the last change to the task, a rename included, timed by your computer's clock and the server's. Notes are the office's and always stay yours. When nothing of theirs is kept, the button reads **Keep yours (replaces Kim Walsh's)**, as before.

When their save was a restore, the review says so — "Since your last save, Kim Walsh restored Plan A. Keep yours puts back the plan from before that restore." — as long as Gantry can check in time.

The review on the People page leaves the copy out for the projects People saves on its own: People saves only bookings, and a copy never carries any. The project open in the editor is the exception. People saves it through the editor, so its review is the editor's own, also when **Review** under **Needs attention** on People opens it, and offers **Save yours as a separate copy**. Like any copy, that copy has none of the bookings, not even those made on People.

Nothing is overwritten silently. When a teammate saves while you have no unsaved changes, you simply get their plan, with the changed cells flashing briefly — see Companies and groups. While you have History, **Save a version...** or anything opened from History open, their save waits and lands when you close it.

If a save fails

If a project's save has already failed — the chip shows "⚠ Save failed — click for Save now" or "⚠ Another version saved — review" — and you try to leave it, Gantry asks whether to stay or leave anyway. Leaving tries the save once more. If that fails too (you are offline, someone else saved, or storage failed), your changes are kept in one recoverable place rather than lost, and the status bar shows *Couldn't save "project" — click to recover*.

Recovering re-opens that project. If nobody else saved it meanwhile, your changes go back on automatically; if someone did, the same review opens, comparing your recovered changes with the saved version, and keeping yours keeps the progress you hadn't seen in the same way, with the same words. The message stays — even after a crash or an accidental close — until you deal with it or a later save of that project succeeds.

Without a company account

Projects are saved in your browser, and so is their History. It works as above, except that there is no Live or Draft, no People, no teammates and no check on other projects:

- **Automatic saves** are the browser's backups of each project: "the last 5, 4 minutes apart". Their rows read "Backup".
- **Saved versions:** 5 per project, plus the newest 3 "Before restoring ..." rows. Rows name no one, and anyone using the browser can rename or delete them.
- Project settings → **Autosave backups** → **History...** opens History too.
- All of it stays in this browser. A file you save with `Ctrl+S` holds today's plan, not its History; another browser or device has none of it, and clearing the browser's data for the site loses it. Deleting a project deletes its saved versions and backups with it.
- When the browser is nearly out of room, **Save a version...**, **Keep this one...** and a restore refuse and change nothing, rather than leave your plan itself no room to save. Delete a saved version in History, then try again.

If a second browser tab edits the same project, the status bar warns you and offers to load that tab's plan. Until you load it (or reload the page), or edit this plan so it saves, **Save a version...** and a restore refuse and change nothing.

The public [demo](#) works the same way, in your browser: you can save versions, look, compare and restore. It keeps nothing between visits — every refresh of the page erases your changes and every saved version, and starts the sample again.

Who can use it

Admins and Editors see the save chip, History and the library in the editor; a Field account never does. Any Admin or Editor can save, keep, look, compare, rename and restore; restoring a Live project outside Training takes [Master planning](#). **Delete...** on a saved version is for the person who saved it, or an admin. Deleting a project is for those with the right to delete it — a group's or company's admin, in the projects they manage. Without a company account, whoever uses the browser can do all of it. See [Who can see and do what](#).

Good to know

- `Ctrl+S` doesn't save to Gantry — it downloads a copy of the project as a file. Saving to Gantry is always automatic.
- Undo history starts over when a different plan loads — a restore, a resolved conflict, a recovered draft. See [Editing in the grid](#).
- Saved versions belong to their project: a copy of the project starts with none, and crews, crew links, share links and My tasks never see them.
- A shared view-only link has no save chip. An account that isn't part of a company yet doesn't save automatically, even though its chip reads "✓ Saved".

Print and export

Print the schedule as a PDF on the paper size you need with saved settings, and export it to Excel, CSV or MS Project XML — and what each format keeps.

Your schedule can go on paper or into another program. The PDF dialog prints the table, the Gantt chart or both on any of five paper sizes, and remembers the settings you use again. Excel, CSV and MS Project XML exports carry the schedule into other tools.

Where to find it

Export ▾ on the editor's toolbar: **PDF...**, **Excel (.xlsx)**, **CSV** and **MS Project XML (MSPDI)**.

The PDF

PDF... opens the export dialog, with your options on one side and a live preview of the pages on the other.

- **Content — Table + Gantt chart** (the default; the **Grid ↔ Gantt** slider and the column checkboxes set the mix), **Gantt chart only** (bars labeled with task names, milestones with their date), or **Table only** (the full-width table, no chart).
- **Paper — Size** is Letter, Legal, Tabloid (the default), ANSI D or ANSI E, and **Orientation** is **Landscape** (the default) or **Portrait**.
- **Date range** — leave it empty to print the whole project.
- **Timescale — Fit across pages** (choose how many **Pages wide**), or days, weeks or months.
- **Table columns** — tick the columns to print. These are chosen here, separately from what the grid shows.
- **Show on chart** — link lines, critical path highlighting, the today line, bar shading by % complete, weekend shading, and, when the project has them, the **Crew histogram**, the data date line, baseline bars (and which baseline), task colors and deadlines.
- **Options — Gridlines**, **Color table rows by task color**, the key (**Legend page**), **Cash flow page** when tasks have costs, and **Hide subtasks of collapsed summaries** to print the collapsed outline.
- **Header & footer** — the **Schedule date**, and a logo (**Upload logo...**).

Print... opens the PDF in a new tab with the print dialog ready; **Export PDF** saves it as a file.

The key

Legend placement puts the key on a **Separate page** (the default) or **With schedule if it fits** — on the last schedule page when there is room, and on its own page when there isn't. The key is a compact band of boxed sections side by side — the chart's **Symbols**, **Task colors**, the **Crew** trade colors and a **Project** summary.

The **Crew histogram** option prints the stacked crew band under the chart, in trade colors, with crew still needed striped, labeled gridlines, and each day's total when the scale is by day. **Color table rows by task color** washes each table row in its tag's color — in table-only prints too, where the key then lists the tag names.

Saved print settings

Save any mix of options under a name — "Owner monthly update" — with **Save settings...**, and pick it next time from **Saved print settings**. Signed in to a company account, your saved settings follow your account; without one, they stay in that browser.

A company admin can also press **Set as company default...** to make the current options the company's print layout. Everyone in the company then finds it as ★ **Company default**, and a company logo, when one is set, fills in on its own.

Excel and CSV

Excel (.xlsx) is one click: a styled workbook with row tints, text styles and typed columns. **CSV** is plain text for any program.

- Both export the columns the grid is showing — a hidden column drops out until you show it again.
- When any task has a cost, the Excel file gains a second **Cash flow** worksheet with the monthly planned, earned and baseline amounts, whether or not the Cost column is shown. See [Cost loading and cash flow](#).
- Under a filter, both ask whether to export only the filtered tasks. See [Filters, saved views and the 3-week lookahead](#).

MS Project XML

MS Project XML (MSPDI) writes the project as a Microsoft Project XML file. Microsoft Project opens it directly (File → Open; use Save As in Project to get an `.mpp`), and Primavera P6 imports it with File → Import → Microsoft Project XML.

It carries everything Ganttry's importer reads back:

- tasks, the outline, WBS and Activity IDs;
- durations (in each task's calendar hours) and milestones;
- all four link types with lag, and constraints and deadlines;
- % complete, actual dates, remaining work and the data date;
- notes;
- every named calendar and which tasks use it — working weekdays, holidays, and yearly shutdowns written out as dates across the schedule.

The active baseline goes out as MS Project's Baseline 0, for Project's benefit only — Gantttry doesn't read baselines back in.

Not exported: crew, equipment, assigned people and units, quantity, cost, your own columns, color tags, text styles, other baselines, and float and late dates (Project works out its own). Extra working days are written out but ignored when the file is imported again.

The XML export is always the complete project, even under a filter — MS Project needs every task and link.

Field paper

The crew handout, the itinerary and the master sheet print from their own screens — see [Crew paper](#).

Who can use it

Admins and Editors, from the editor. Setting the company's default print layout is for company admins. See [Who can see and do what](#).

Good to know

- **File ▾ → Save a copy (JSON)** (**Ctrl+S**) saves the whole project as a Gantttry file you can open again later with **Import file...**
- The lookahead sheet: filter to the 3-week lookahead, then **PDF...** — see [Print the 3-week lookahead](#).
- Weekend shading follows the project's calendar, even for tasks on their own calendars.

Importing a project

Bring in a schedule from MS Project XML, Primavera P6 XER, Excel or CSV — and update a project in place when the next month's file arrives.

Gantry opens the schedules owners and other planners send you: Microsoft Project XML, Primavera P6 XER, and Excel or CSV spreadsheets. It works out what kind of file you gave it from what is inside, not from its name. When a newer copy of the same MS Project or P6 schedule arrives, it can update your project in place instead of starting over.

Where to find it

- **Import...** on Home.
- **File ▾ → Import file...** in the editor, or **Import...** on Home or on the Open a project page.

When you belong to more than one company or group, the import asks where the new project should live.

Started from Home or from an empty Projects page, an import that brings in a new project, or adds rows to the open one, closes the page and shows that project in the editor.

How Gantry reads a file

Gantry looks at a file's *content*, not its extension, so a file with the wrong name never dead-ends. Anything it can't identify for certain opens the spreadsheet wizard, with a short note saying why.

It can open:

- a Gantry project file (saved with **Save a copy (JSON)**);
- Microsoft Project XML — in Project, File → Save As → XML;
- Primavera P6 XER — in P6, File → Export → XER. Gantry reads XER but does not write it;
- Excel (.xlsx) or CSV spreadsheets, through the wizard.

A native `.mpp` file can't be read — it is a closed format. Gantry says so: in Microsoft Project, choose File → Save As → XML, then import that file. An old `.xls` workbook needs saving as `.xlsx` or CSV first.

Every warning, before you import

Anything that won't come across as it was is a warning, and you see every one of them before anything is imported:

- *An MS Project or P6 file* opens a window with the project's details, then every warning under a count such as `This file has 14 warnings.`, in a list that scrolls inside the window. Nothing is imported until you press **Import as a new project** (or *Update*, below).
- *A spreadsheet*: when you press the wizard's last button, Ganttry checks the rows first. If it finds warnings, it imports nothing yet: it lists them all above the buttons — `This file has 15 warnings. Nothing is imported yet.` — and the button becomes **Import anyway**. Press it to import exactly those rows, or change a column choice first; any change checks again. A file with no warnings imports at once.

The status line then says how many came in, such as `Imported "Bridge 12 bid" as a new project – 27 tasks – 15 warnings`.

Microsoft Project XML

An MS Project XML file brings in:

- tasks and the outline;
- all four link types with lag;
- all four constraint types — *Must Start On*, *Start No Earlier Than*, *Must Finish On* and *Finish No Later Than* — and deadlines. A *Start No Earlier Than* date stays in force even when a predecessor also drives the task: the task starts on the later of the two, as in MS Project and P6. A *Must Start On* date holds even when the logic wants a later start, and the conflict is flagged. Other constraint types (*As Late As Possible*, *Start No Later Than*, *Finish No Earlier Than*) are skipped, with a warning;
- % complete, actual dates and the status date, which becomes the data date;
- WBS codes as Activity IDs, and the calendar, including hours per day.

Calendars from MS Project

Task calendars that at least one task uses come across as named calendars, with their working weekdays and their holidays (the non-working exception days). Extra working days, and anything a calendar inherits from a base calendar, are not imported. Every calendar uses the file's hours per day. At most 20 task calendars import — tasks on the others use the project calendar, and the import warns you to review their dates. A calendar with no working days at all imports as Monday to Friday, with a warning.

Primavera P6 XER

A P6 XER file brings in:

- the WBS as summary rows;
- all four relationship types with lag;
- the project calendar — workweek, holidays, extra working days and hours per day;
- durations, milestones and % complete, with the remaining duration of activities in progress (P6 keeps physical % and remaining work separate);
- activity IDs, actual dates and the data date;
- P6 constraints, mapped onto Gantttry's four types;
- the P6 calendars that tasks use, as named calendars.

It warns about anything it had to simplify, such as calendar data it couldn't read or a constraint type Gantttry doesn't have. A file with several projects imports only the first.

Excel and CSV: the wizard

A spreadsheet opens the column-mapping wizard, with a preview of the rows.

- It matches common headings on its own: Name, Duration, Manhours, Predecessors, % complete, Deadline, Cost (also Amount, Total or Budget), Assigned To, Equipment, and WBS or outline level for the hierarchy — and construction words too: *Cost Code* or *Bid Item* → Activity ID, *Phase* → WBS, *Labor Units* → Hours, *Superintendent* or *Foreman* → Assigned To.
- Built-in mappings for Primavera P6 activity spreadsheets and Microsoft Project table exports apply themselves when their headings are found.
- Save a mapping as a named **Preset** — one for your estimating system's exports, say — and pick it next time.
- Columns that match nothing can come in as your own text columns: tick them in the list of unmatched columns, and rename them if you like.
- A Start date becomes a *Start No Earlier Than* pin, which stays in force when a link is added.
- A date without a year comes in as this year's. A date it can't read is left out, with a warning such as `Row 3: couldn't read start date "Feb 30"`.
- Assigned To comes in as names only — it isn't matched to accounts. Equipment is a comma-separated list such as `2x Excavator, Roller?`; unlike Crew, a leading number is part of the machine's name.

A spreadsheet can land as a new project or be added to the open one — the last button says which: **Import as a new project**, or *Add to* followed by the open project's name. Adding to a project reuses

one of your columns with the same title instead of making a second.

Updating a project in place

When a newer MS Project XML or P6 XER export of the *same* project arrives — the monthly update cycle — the import offers *Update* with your project's name, next to **Import as a new project**. A review groups what the file adds, removes and changes, with a checkbox for each group, then applies it as one undo step. Its changes table shows the first 200 changed fields, then a `Show all N changes` button, with your file's count, for the rest. The file's own warnings were listed in the window before. The review lists only the warnings from matching the file to your project, such as a source ID the file repeats or a different project ID, under a count such as `This update has 2 warnings.`

Gantttry matches tasks by the file's own task identity, remembered from the first import. So tasks you created in Gantttry — and your notes, colors, crew, equipment, assignments, quantities, costs and your own columns — are never touched by an update, and links you drew to Gantttry's own tasks survive too. Task order and the outline follow the incoming file.

A spreadsheet can't update in place, because its rows carry no lasting identity: it always lands as a new project or is added to one.

Who can use it

Admins and Editors import schedules into the companies and groups they belong to. See [Who can see and do what](#).

Good to know

- Read the warnings before you import — they name anything that won't come across as it was.
- To send a schedule back to MS Project or P6, export MS Project XML — see [Print and export](#).
Baselines don't come back in from that file.

Crew planning and the crew you still need

The Crew planning page lays out one project's crew and equipment demand day by day or week by week, and shows the crew you still need to find.

Crew planning turns the crew lines on your tasks into a matrix: one row per trade, one column per day or week, for the open project. It shows how many people the plan calls for, which of them nobody has been found for yet, and where the plan asks for more than you have.

Where to find it

Open a project, then use any of these:

- the sidebar's **Crew planning** row, under Resources;
- the project's **Crew planning** tab, beside its **Work** and **Dashboard** tabs;
- **Tools ▾** → **Crew planning** in the editor.

For the tabs beside it, see [Work, My tasks and Calendar](#) and [the Dashboard](#).

The page head names the project, the window and the units, for example "headcount/day", or "crew-days/wk" when you look by week. Its **Project:** picker switches to another project and keeps you on Crew planning. **Open schedule** takes you back to the project's editor. **Book people**, beside it, opens [People](#) on this project, where you book its people day by day; the editor's **Tools ▾** has the same **Book people**. Both show only in a connected company, to someone who can edit the project, and never on a student's copy or a class board in [Training](#).

How these fit together

The three pages under Resources follow the order a team works in:

- 1 **Roster & equipment** sets up the list: who and what your company has, the people with their trades and the machines with their types.
 - 2 **Crew planning**, this page, plans the counts: how many of each trade one project needs, per day, against how many you have.
 - 3 **People** books the names: it puts named people from the list on tasks, day by day, across projects.
-

Crew planning counts trades (how many carpenters); People books names (which carpenter).

Crew lines on tasks

The numbers come from each task's **Crew** column. Write who the task needs in plain words:

- `3` is three people;
- `1 foreman, 2 laborer` is a foreman and two laborers;
- `laborer x2` and `2x laborer` also mean two laborers.

Add `?` to demand you can't staff yet: `2 carpenter?` means two carpenters are needed and nobody is assigned. The grid shows that cell in a warning color, so a hiring need stays visible instead of hiding in a normal-looking plan. Equipment works the same way through its own column; see [Equipment on tasks](#).

To pick instead of type, click the ▼ at the right edge of an active Crew cell, press `Shift+F2`, or press `Alt+↓` while typing in the cell. The **CREW** section of the popup lists your company's trades and people. The same picker sits in a task's pane on [People](#) (**Add a trade or person...**); a line added there counts here like a typed one.

The matrix

The **CREW** section has one row per trade, sorted by demand, with a colored dot for each trade. Each cell is that day's headcount, shaded against the row's own busiest day. A totals row sits underneath.

- **Days** and **Weeks** switch the columns between single days and Monday weeks of crew-days.
- The window buttons are 2, 3, 4, 8, 13 and 26 weeks (**2 wk** to **26 wk**), plus **Full** for the whole project. The < and > arrows step the window earlier or later.
- A cell with `?`-marked demand reads like `3 (+2?)`: the plan calls for five, three staffed and two marked `?` that nobody has been found for yet.
- Once a task has people booked by name, its still-to-find count goes by the day: someone booked on only some of the task's days fills its line on those days alone.
- **Filter trades and types** narrows the rows by name.

When the project carries equipment, an **EQUIPMENT** section sits under the crew, one row per machine type, built the same way. **Sections** shows **Both**, **Crew** or **Equipment**; it only appears once the project has equipment or your company has a fleet.

Have: the crew you can put on the project

The **Have** column is where you record how many of each trade this project actually has. Leave it blank when you don't know, enter `0` for "we have none", and clear it to forget. Use **Add trade...** under the

matrix to list a trade by name with its count.

On any day where the plan calls for more of a listed trade than you have, the cell turns red, in the matrix, the totals row and the Gantt crew band. That is your signal to move people over or hire. A blank Have never flags anything.

A note under the matrix keeps the two numbers apart: "Have is what you can put on this project; Demand is what the plan calls for — the two never merge." Have saves with the project and undoes like any other edit.

The side pane

Select a row to open its details in the side pane (**Details** shows or hides the pane):

- **TRADE** or **TYPE**: the total for the window, the peak day and any still-to-find count.
- **HAVE** for a trade, or **IN FLEET** for a machine type.
- **SHARED COVERAGE**, when tasks in a coverage set share this trade.
- **FILLED BY**: the people or machines actually assigned to this trade on this project. You can't assign here; press **Shift+F2** on a task's row in the Schedule to fill a slot, or use **Book people** to book people by the day.

When your company is connected and you haven't entered a Have yet, the pane's **HAVE** section for a trade offers a suggestion from the roster, such as **use 4**: the active people on the roster with that trade. When the project belongs to a group, its tooltip breaks the number down into people in that group, people at company level, and people you would borrow from another group. Nothing turns red until you click it. Once you click, it is an ordinary Have entry you can edit or clear.

Equipment rows

An equipment row's lead column is read-only: it shows how many units of that type are in the company fleet and how many are down, for example **6 in fleet · 1 down**. That count is company-wide, not per project, so equipment rows never turn red here. To see a machine booked on two projects on the same day, open the Resource assignments report.

Printing

Print prints exactly what is on screen: the same days or weeks, the same sections and filter. It prints in landscape and scales down to fit the page width when the matrix is wider than a sheet. A stamp names the project, the window, the day it prints, and days or weeks, and says how far the page was scaled.

Who can use it

Anyone who can open a project in the editor can use its Crew planning page, in local mode and the demo too. Field accounts can't open it. The roster suggestion and fleet counts need a connected company with people and equipment on its [Roster & equipment](#) page. See [Who can see and do what](#).

Good to know

- Have on this page is only for this project. The cross-project [Crew & equipment demand](#) report reads the company roster and fleet instead.
- A Draft project shows a Draft pill here; see [Draft and Publish](#).
- You can list up to 50 trades in Have.

Equipment on tasks

A task can carry the machine types it needs, with a quantity, the specific machines and people assigned to fill them, and the tools its crew should bring.

A task carries the machines it needs the same way it carries crew. You say which machine *types* the task requires and how many, then, separately, assign the actual units or people that fill those slots. The demand shows on [Crew planning](#) and in the [crew and equipment reports](#).

Where to find it

Equipment lives in the **Equipment** column, which is hidden until you show it (right-click a column header, then **Add or show columns...**). You fill it from the **Crew & equipment** popup rather than by typing in the cell. Any of these opens the popup:

- press **Shift+F2** on a task's row;
 - right-click the row, then **Crew & equipment...**;
 - click into the task's Equipment cell (a character you type there starts the popup's search);
 - click the ▾ button at the right edge of an active Crew cell, or press **Alt+↓** while typing in one. This works even when the Equipment column is hidden.
-

Types and quantities

In the popup's **EQUIPMENT** section, type in **Add equipment...** to pick one of your company's machine types, then set the quantity with the – and + buttons or by typing a number. Mark a line you can't fill yet with its **?** button (*still to find*), the same idea as **?** on a crew line. A type your company doesn't list can still be added to this one task.

The popup's **CREW** section works the same way. Type in **Add a trade or person...** to pick one of your company's trades or a person from the roster, then set how many with – and +. Type a number first, such as **2 carp**, to add two at once. Picking a person adds a line for their trade, or one more on the line already there when it is full, and fills it with them. Someone who is off, away or retired is listed with the reason and can't be picked, and someone already on the task reads **<name> is already on this task**. The Crew cell then reads as if you had typed it, such as **2 Carpenter**. You can still type crew straight into the **Crew** column; see [Crew planning](#).

Pasting and importing

You can still paste a whole list from a spreadsheet, or bring one in with an import, for example `135 Excavator, 2x Haul Truck, Roller?`. Unlike crew, a leading bare number is part of the machine's name: `2 Roller` is one machine type called "2 Roller", not two rollers. Write `2x Roller` for a quantity.

Assigning units and people

Each required line has a button to fill it: **+ Assign machine** for equipment, **+ Assign person** for crew. The picker lists your own group's people or machines first. Other groups are folded under an "Other groups" line that opens when you click it or search. A machine that is down, or a person who is away, is shown but can't be picked, with the reason beside it (for example **Retired**, or down until a date).

When you fill a slot with a roster person who is linked to a login, they are also added to the task's **Assigned To**, so the task shows up in their My tasks. A roster name with no login fills the slot but is not added.

+ Assign person books a person for the whole task. To book someone for only some of its days, use the People page. The popup counts people by the day: a crew line reads its fewest-staffed day, such as `2 of 3 filled · unfilled on 1 of 5 days`, and a chip names a partial booking's days, read-only, such as `Worker 015 · Mon-Tue`. Unpicking a person in the picker removes every booking of theirs on that line.

If you pick a unit that is already assigned elsewhere *in this project* on overlapping dates, the popup warns you, naming the other task and its dates. It never blocks you: two machines can share a yard on paper. The warning only covers this one project. To see a unit booked on two projects on the same day, and which machines sit idle, open the **Resource assignments** report; see Crew and equipment reports.

Type versus unit

`135 Excavator` names a *type* of machine; `2x` in front of it is the *quantity* the task needs. Assigning two specific units fills both slots. The type line is never a count of machines you already have on hand. That count comes from your company's fleet on Roster & equipment.

Tools

Tools are a plain checklist of what the crew should bring, not equipment: nothing tracks them. Show the hidden Tools column (it is listed under Crew, people & equipment in **Add or show columns...**)

and type a comma list, such as `Level, String line, Form oil`. The task's pane on [Work](#) lists the same tools under **Tools needed**, with an `Add a tool...` field. Tools reach [crew links](#) and print on the [crew handout](#).

- A task lists up to 20 tools of up to 60 characters each; a repeat is ignored.
- Once the column is shown, it prints in the grid, copy and paste, CSV, Excel and PDF. Hidden, as it starts, it changes no export.
- CSV and Excel imports have no Tools field, so a re-imported export comes back without them.
- A tool you need to track, for availability or conflicts, belongs in equipment instead.

Applying and copying

Apply saves the popup's changes to the task; `Ctrl+Enter` (or `Cmd+Enter`) applies and Esc cancels. With several rows selected, a button that reads "Apply to 3 selected rows" (your count) copies the equipment types and counts to every selected row; the named people and machines stay on the row you opened.

Copying or duplicating a task keeps its required crew and equipment, and its tools, but drops the people and machines filling its slots; its **Assigned To** stays. A project template, and a copy of a whole project (**Make a copy...**, or **New project from this** in History), drop both, so a copied project plans clean: it doesn't book last year's crew on day one.

Who can use it

Typed and pasted equipment works everywhere, including local mode and the demo. Assigning specific units and people needs a connected company with a fleet and a roster. Field accounts see who and what is assigned, and the tools, read-only, in the task pane on [Work](#). See [Who can see and do what](#).

Good to know

- A task holds up to 12 machine types, and up to 99 of each.
- A task can have up to 40 people and machines assigned.
- Removing a type that has machines assigned asks whether to release them too (**Release** or **Keep**).
- Share links carry the type and trade names, never anything that identifies a record behind them.
- Tasks that genuinely share machines can be joined in a [coverage set](#), so the machines are counted once.

People

People books your company's roster day by day across every project, and shows who works where, which tasks are still short, and who is free.

🔗 Needs [Master planning](#)

People shows who works where, day by day, across every project: a row for each person on your company's roster, a column for each day, and each booking a bar in its project's color. People are booked a day at a time, so they count only on the days they work.

Where to find it

- the sidebar's **People** row, last under Resources, or **Tools ▾ → People**;
- for one project: **Book people** on [Crew planning](#), **Tools ▾ → This project → Book people**, or **Change days on People →** in a task's details on the Work page, which selects that task (see [One project](#)).

The page head carries **Roster & equipment →**, which opens [Roster & equipment](#), the list the names come from (on one project's People, just before **Open schedule**). A phone leaves it out of the head; the sidebar's **Roster & equipment** row opens the same page.

How these fit together

The three pages under Resources follow the order a team works in:

- 1 **Roster & equipment** sets up the list: who and what your company has, the people with their trades and the machines with their types.
- 2 **Crew planning** plans the counts: how many of each trade one project needs, per day, against how many you have.
- 3 **People**, this page, books the names: it puts named people from the list on tasks, day by day, across projects.

Crew planning counts trades (how many carpenters); People books names (which carpenter). From a task's pane, People can also add a trade to the task's crew, the same change as typing it in the Crew column; Crew planning's counts follow (see [The pane](#)).

Who can use it

People has the master plan's gates: a company admin, or someone given Master planning, in a connected company. Anyone else reads "People isn't available", and a Field-only account lands on **My tasks**. One project's People is open to anyone who can edit that project, but never to a Field account, and never on a student's copy or a class board in Training. Local mode and the demo have no People.

The board

OPEN WORK along the top lists each project's tasks still short of people, day by day: **1 Laborer unfilled** in red, **2 Laborer still to find** in amber for a crew line marked **?**, or **2 Laborer · nobody named** in gray on a task with nobody named on it yet; where the words don't fit, they shorten to **2 Laborer**, or to a badge such as **2?**, in the same color. Its head splits the tasks, such as **· Nobody named 2 · Short 2**: *nobody named* is a task with demand and nobody booked on it yet, *short* one with someone named and a line still short.

Under it, **NO CREW · 3 tasks in this window ▶** lists the tasks with no crew line at all, folded until you open it, and only when the window has one. Each row is the task, in its project's color, with a dashed bar over its days; a click opens its pane. A milestone is never listed; a task with only a machine is, the machine named. A task someone is on Assigned To for says **Assigned to: Sal Rinaldi · no crew slot**.

NOT NAMED counts the lines a placeholder name holds, and **NO WORK** folds away the people with nothing in the window. On a row, a bar is a booking; an outline, a task they are on Assigned To for with no booking; hatching, a day away; red, a double booking. Someone booked on an empty row of a project (a row with nothing typed in it) is booked on no day there: People draws no bar for it, and it is never a double booking. The legend lists the projects A–Z with their *Draft* pills; click one to dim the others. Teammates' bookings show within 30 seconds, on the project open in the editor too. If the editor holds nothing unsaved, it takes the teammate's save. If it holds unsaved changes, People shows that project as the teammate saved it and says so on the status line: **Kim Walsh saved Bridge 12 – shown here, not yet in your editor; yours will need a review on save**. Your own unsaved changes to it stay in the editor, hidden on People until the review, and still count when People checks for a double booking. **Needs attention** lists the project as **Another version saved**; **Review** there, or the editor's next save, opens the review of what differs (see Saving and history).

The window

1 wk, **2 wk**, **3 wk**, **4 wk**, **6 wk** or **8 wk** set the window, < and > step it and **Today** comes back; on a narrower window **6 wk**, **8 wk** and **Whole project ▼** move into the ⋮ menu. People keeps your window and look but always opens on this week. **Sections: Trade ▼** groups the people by trade,

project or (with saved crews) crew; **Sort: Name** ▾ also offers **Most booked first** and **Least booked first**; / filters.

At 1 wk, **View: Day line** ▾ sets how each day draws: **Day line** (each task's staffing that day under its bar, such as 5/6 in its need's color), **Day cards** (a card for each booked day) or **Bars only**. Wider, a row draws at most three lanes, the third reading +n on a day of four or more tasks.

Demand on the trade heads

Each trade's head reads its demand by day: 7 need · 3 booked · 196 free at 1 wk, as far as the day has room; the need alone when wider, or for a whole project. It turns red when even everyone free falls short. The need leaves out lines a placeholder name holds; free means not away and holding nothing that day, not even an outline, on a loaded project. Point at a day's demand for the whole sentence, such as 6 needed · 5 booked · 194 free · 102 held by a name only; on a touch screen, tap it, and it opens in a note under the row, or above it when there is no room below. A second tap closes it. A NOT NAMED count opens its sentence the same way.

The pane

Details shows the side pane; on a wide window it opens by itself. With nothing selected it lists Needs attention, New in a stay, Unfilled, Nobody named, Double-booked, No task, Away and No work; a click brings that row into view. Nothing there blocks a save.

- A task shows its people and staffing by day, its machines read-only with **Open in schedule**, **Tools needed** (its Tools), its notes and its day notes. Opened from someone who is only on the task's Assigned To (a dashed bar), it says so in a gray line under its dates, such as Sal Rinaldi · On Assigned to for this task, not in a crew slot. **Open in schedule** opens the editor with the task's row in the middle of the grid when there are rows after it.
- *Adding to a task's crew*: where you can edit the project, **Add a trade or person...** under Resources is the Crew column's own picker: your company's trades, then the ones the project uses, then the roster with each trade; type 2 lab for two. A trade adds to the task's crew (Added Foreman to Pour abutment A's crew · Bridge 12): the task's demand and Crew planning's counts change, and crews see the new Crew: line at the next save on a Live project, or with the next publish on a Draft. A person is booked, from today on, on the days their trade's line is short and they are free of other projects; the line is added first when the task has none, or raised by one when it is full every day (Booked Luis Ortega on Pour abutment A · Mon Oct 12 – Fri Oct 16 · added a Foreman line · Bridge 12), and one **Undo** takes both back. Someone away is listed with the reason and can't be picked. Typed crew with no match, such as 3 rodbuster, offers Add "3 rodbuster" to this task only. Typed crew takes your trades' spelling (foreman, 2 laborer saves 1 Foreman, 2 Laborer); a trade that isn't one of yours stays as typed.

- A person shows **Booked in this window**, **Also on Assigned to** · n ▶, any stay, and, for each project they are booked on near the window, **Suggested next on Bridge 12**: up to three open tasks of their trade, short on days they are free, each with **Book...**, then up to two **Later** rows (**after Strip abutment A**). Suggested next never books by itself.

With a keyboard or a screen reader

The grid is one **Tab** stop. The arrow keys move a cursor by person and day, and **Enter** opens the day. A screen reader reads the cursor: the person, the day, and each task they are on that day with its project and staffing, **Assigned to** for an outline, the day note once per project, **double-booked** on a double-booked day, and the end of a stay — or **free**. See [Accessibility](#).

Day notes

At **1 wk** a day note shows as a mark on the Day line, or its first words on a card; **Office only** means crews don't see it. A person's day in the pane lists each project they touch with its **On site** notes, each task's **Crew:**, **Equipment:** and **Tools:** lines, and **Day notes...** for that project and day.

Booking by the day

Click a person's day, or press Enter on it, for the day's list: **Booked this day** (only when they're booked that day), each task with **Remove this day**; **Assigned to**, no crew slot, the tasks they're only on Assigned to, dashed and with nothing to remove; **Open this day** · Laborer, the tasks open on their trade's line (**3 of 4 filled**, red when short); and **Other trades (n)** ▼. Point at a task and choose in the foot: **This day**, **Through the task's end** or **Through the end of the project** (see [Stays](#)); a click on the task, or Enter, books it. Or drag:

- an **OPEN WORK** task onto a person's day;
- a project-day's :: n grip onto a person's same day, for that project's tasks short of their trade;
- along a row, for a range of days;
- a bar's ends, to add or free days, or the bar onto someone else, to hand it over.

Space selects a booking and Delete frees that day. The task pane's **+ Assign person** lists the people free on the short days first, then the busy ones and where (**On Yard Expansion Wed–Fri**), and books only the days each is free; someone busy on all of them isn't booked, and People says where. Someone already on that line every short day isn't listed; searching for them says so. The Work page's **+ Assign person** and the editor's **Crew & equipment...** still book whole tasks.

Move off

When the person holds another project's task on those days, the foot offers `Move off Set fence posts on these days` (the default) or `Keep Set fence posts too`, and a drag moves them off. People moves someone off only a project you can edit, and names it (`· moved off Set fence posts on Yard Expansion`); **+ Assign person** never does.

The rules

- A booking never moves a task's dates and never publishes.
 - People books only a line's short days and names the rest (`Thu Oct 8 – Fri Oct 9 already full`); it refuses a day the task doesn't run, an Away day, and more than a task's 40 people and machines.
 - Booking someone with a login puts them on Assigned To; removing their last booking takes them off if People added them, else the status line says `still on Assigned to`.
 - A People booking keeps its days when its task moves (`· not on this task's days`); a whole-task one follows it.
 - The first booking into a Draft project on a visit says `Bridge 12 is a Draft – crews see it after you publish.`
 - A save that is refused lands under `Needs attention`, and the status line says so, such as `Couldn't save Bridge 12 – see Needs attention.` Wherever the status line says `see Needs attention`, click those words to go there: the pane shows its lists, opening if it was closed, with the focus on the row's **Review** or **Retry**. On a phone, any open sheet closes and the day goes back up to those rows.
-

Undo and Redo

Each gesture is one step, however many projects it touched, named on the status line with **Undo**. Ctrl/Cmd+Z and Ctrl/Cmd+Shift+Z or Ctrl+Y work while People is open, as do the **Undo** and **Redo** buttons, whose tooltips name the step. Undo leaves a teammate's later change and names it, and never re-books someone booked elsewhere since. The steps clear when you leave People.

Publish and print

Publish..., for those who can publish, opens **Publish to crews** with the page's Draft projects; it is grayed out while none has anything to publish. **Print ▾** is the master plan's print menu, its sheets titled *People*; a day sheet covers the projects with a named booking that day. Company admins also get **Itineraries for the people shown...**: a week's itinerary for each person shown, up to 50, in one PDF. Right after a window change or opening a whole project, the sheets stay grayed out until People has

read which projects have work in those days; a print that gets there anyway says "Still loading the projects on this page — try again in a moment." See [Crew paper](#).

Whole project

On the company page, **Whole project ▼** lists the projects with work in the window. Pick one to see it across its whole span, its people's other bookings as gray bars; past 8 weeks, **Days** and **Weeks** switch the columns.

One project

Book people and **Change days on People →** open one project as Whole project shows it, for anyone who can edit it, except on a student's copy or a class board in Training, where neither is offered; *free* there means free on the projects you can see. It has no window buttons, **Whole project ▼** or **No work**. Without master planning there is no **Publish...**, and a booking into a Draft reaches crews *with the next publish*.

Saved crews

A saved crew, kept on the **Saved crews** tab of [Roster & equipment](#), is a named group of people, usually a foreman and the people who work with them, that you book together; renaming or retiring one changes no project. Company admins and holders of master planning manage crews. With one, **Sections: Trade ▼** gains **Crew (ORTEGA CREW · 6 · Foreman Luis Ortega**, then **NOT IN A CREW · n**), and Whole project and one project open by crew.

Book crew... on a crew head (on the company page, then a project you can edit), or the crew's **::** grip dropped on a project's **OPEN WORK** day, opens **Book Ortega crew on Bridge 12 : From and Through (End of this window**, except in a whole project or one project; **End of the project**; or **A date...**), the tick **Luis Ortega (foreman) stays through the end of the project**, **What this books, Left over** and the button, such as **Book 5 people**. Each person takes the first open line of their trade, one task a day, never over-filling, and skipping days they are away or booked; a ticked foreman books to the project's end and stays. It is one change you can undo.

Stays

A stay keeps a person on a project between tasks. The crew dialog's tick makes one for the foreman, and **Through the end of the project** for anyone. A band in the project's color along the foot of their row reads **through Fri Oct 23 (→ Oct 23** past the window), with a **no task** box on each working day of the stay where they have no task anywhere.

- The pane's **No task** lists those days; **New in a stay** lists a task added since the stay was made and short of their trade, with **Book Luis Ortega** and **Fill from Ortega crew...**.
- **Through the end of the project** shows in a day's foot for a task under **Open this day · Laborer**, on a project you can edit that runs past that day, unless it is an Away day or they are already kept there to its end. It books a task a day on their free days to the project's end, and makes the stay.
- **On a stay**, in the person's pane, has **End stay...** where you can edit the project and the stay isn't over. A stay starting today or later is removed; an earlier one ends yesterday. Bookings don't change.

In the field

A stay reaches the person's **Day plan** and **itinerary**, on the phone and on paper, without a publish: on a day their plan gives them no task, they see the project, its address and **On Bridge 12 · no task**.

Good to know

- The Work page counts people by the day too: a crew line reads its fewest-staffed day, such as **2 of 3 filled · unfilled on 1 of 5 days**.
- On a tablet, a tap on a task in the day's list only highlights it, and **Book** in the foot books it; a long press picks up a bar to drag. A tap on a dashed bar opens its task's pane, with the gray Assigned To line (see **The pane**). Beside an open pane, or in a narrow window, the legend shows the projects that fit and keeps the rest under **+n ▾**.
- On a phone People shows one day at a time and you book from a sheet, with no dragging; the **Undo** and **Redo** buttons sit in the page head. Each trade's head carries the day's demand, such as **2 need · 1 booked · 0 free**, red when even everyone free falls short; a trade needed that day with nobody of it on the list still gets its head, such as **OPERATOR · 0**, with that line. Whatever the pane would list under **Needs attention**, such as **Another version saved** or a refused save, is listed at the top of the day with the pane's own **Review** or **Retry**. The booking sheet keeps **Tab** inside it while it is open. From someone's dashed chip, the sheet lists the task under **Assigned to, no crew slot**, then **Day details** ▸ and the line say what the dash means. The day's card splits its open work under **NOBODY NAMED · n** and **SHORT · n**, and folds the day's tasks with no crew line under **NO CREW · n ▶**; a tap on a task there opens its sheet with **Add a trade or person....**

Reports

The Reports page gathers every report in one library, across projects or for one project, and says which plan of each project it reads.

Reports is one page with every report Gantry makes. A library on the left lists them; the one you pick opens beside it, with its own scope, its exports and a line saying exactly which projects and which plan of each it covers.

Where to find it

Open **Reports** from the sidebar (under Insights). It is there in every session, local mode included. On a narrow screen the library becomes a **Report** select at the top. The page remembers the last report you opened on this device.

The library

The reports come in two groups.

Across projects, for questions that span several projects:

Report	What it answers
Crew & equipment demand	How many people and machines the plans call for, by trade or type, per day, per week or per project, and where that beats what the company has.
Resource assignments	Who and what the plans book on each project, day by day, and what sits idle.
Crew & equipment lookahead	The printed three-week sheet of the crews and equipment a project plans, with the names assigned.

All three are explained on [Crew and equipment reports](#).

One project, for one project at a time:

Report	What it answers
Project progress	Planned against reported progress, by area, and the areas running later than the baseline.
Schedule quality checks	Whether the schedule's logic, dates and progress meet the DCMA-style thresholds. See Schedule quality checks .
Schedule update narrative	The monthly update's written sections: progress, critical path, changes and outlook. See The schedule update narrative .
Contract-day ledger	Contract working days charged and excepted, and the forecast against the days allowed. See Contract days and weather days .
Cash Flow	Planned cost by month across the schedule. See Cost and cash flow .

An open report

An open report shows its title, a one-line purpose and the exports it has: **PDF...**, **Excel...** or **Copy**, only where one exists. Under the title is the scope bar:

- a cross-project report lists its projects as chips; the x on a chip removes that project and **+ Add projects...** adds more. Click a chip's name and choose **Only Bridge 12** to narrow the report to that project, and the first row of **+ Add projects...**, **The default (15 projects)**, goes back to the report's own choice. It also shows only the controls that report uses, such as **Weeks** (2w to 26w), **Crew** or **Equipment**, **By project**, **By day** or **By week**, and **Groups**;
- a one-project report has a **Project** select. **Project progress** also has **As of: The plan now ▼** beside it (see [Project progress as of an earlier plan](#)).

With nothing chosen, a cross-project report covers every active project you can see, up to 15 (every eligible project when none is active). A one-project report opens on the project you picked last, or else the first active project. The projects you choose last for this browser tab.

Which plan a report reads

Under the scope bar, two lines say what you are looking at:

- the **Viewing** line: the report, the projects, the period and the units, in the chart's own words, for example **person-days per week**;
- the publication line. Reports read each project's latest plan. When every project is Live it reads **Latest plan**. When a project is a Draft, the line names it and says what crews see instead, for example **Latest plan · Route 9 Culvert is a Draft – crews see the plan published Sep 21, 9:00 AM by Dana Ruiz**, with a **Draft** pill.

The line never lists what changed between the two plans; it only says which one you are reading. See [Draft and Publish](#). Only **Project progress** can read an earlier plan, below; every other report reads the latest plan.

Project progress as of an earlier plan

Project progress can run on one of the project's earlier plans instead of today's. Click **As of: The plan now ▾** beside the **Project** select. The menu lists the plan now first, with the day it is measured at (its data date, or today when it has none, such as **The plan now · no data date, so Oct 6, 2026**), then the project's **Saved versions**, then its **Automatic saves** — the same lists as its [History](#), newest first.

Pick one and the report is worked out on that plan, at that plan's own data date (or, with none, the day it was saved). The button then reads **As of: Plan A**, the Viewing line says **as of Plan A, saved Oct 6 (no data date, so Oct 6, 2026)**, the publication line starts **Plan A, saved Oct 6, 9:59 PM**, and **PDF...** names the plan at the top right of the sheet, as **As of Plan A (saved Oct 6) · no data date, so Oct 6, 2026**. Choose **The plan now** to come back.

Nothing is stored: opening another project or reloading the page brings back the plan now. A plan that can't be opened says why, and the report stays on the plan now. Loading an earlier plan reads **Loading Plan A...** while it works.

When something is missing

A report says what it could not do rather than showing a spinner or a zero:

- **Choose at least one project to see this report.**
- **None of the chosen projects can be included in this report.** when every chosen project is another company's;
- a project that failed to load stays as a dashed chip, and a note says the report covers the others;
- **Could not load the report – check your connection**, with **Retry**;
- past 15 projects: **The report covers the most projects it can (15).**, then the names left out;
- a supply nobody recorded reads **Not recorded**, never 0.

Drilldowns

In **Crew & equipment demand**, click a cell with a number to see the **Contributing tasks** in the side pane. In **Project progress**, every area running later than the baseline has **Show contributing tasks**. Each task row has **Open in schedule**, which opens that project in the editor (from demand, with a

matching filter already applied). < **Back to report** or Esc closes the pane and puts you back where you were; the report behind it is not rebuilt.

Where each report lives

Demand, **Resource assignments** and **Project progress** draw right on the page. The lookahead shows each chosen project's three-week window and prints its sheet with **PDF...**

The other four one-project reports open in the editor as dialogs. Each has a button that opens it for the chosen project: **Open schedule quality checks...**, **Open schedule update narrative...**, **Open contract-day ledger...** and **Open Cash Flow...**. Each switches the editor to that project and opens the dialog over it. Closing the dialog leaves you in the editor; **Reports** in the sidebar brings you back.

The editor has its own doors to the same dialogs for the open project: **Tools ▾ → Schedule quality checks...** and **Cash flow...**, and from **Update progress...**, the **Schedule update narrative...** and **Contract-day ledger...** buttons. The editor's **Views → 3-week lookahead** is a filter on the schedule, not this report; see [Filters, saved views and the 3-week lookahead](#).

From Projects

On the [Projects page](#), **Report on selected projects** hands the ticked projects to the last cross-project report you opened (Crew & equipment demand the first time). The side pane's **Report on this project** opens Project progress for that project. Either way the report shows < **From Projects** to take you back.

On [Roster & equipment](#), **Where are they?** or **Where is it?** opens Resource assignments at that person's or machine's row.

Printing

Printing the page prints the open report, without the library.

Who can use it

Everyone but Field accounts: a Field account has no sidebar and lands on [My tasks](#) instead. A report only ever covers projects you can see. Company roster and fleet numbers need a connected company. See [Who can see and do what](#).

Good to know

- A cross-project report covers at most 15 projects.
- The Weeks, Crew or Equipment and By project, day or week choices are remembered for you.
- Someone booked for only some of a task's days fills it only on those days, in Crew & equipment demand and in Resource assignments alike. To see and change who works where day by day, use [People](#).

Crew and equipment reports

Three reports read crew and equipment across your projects, what the plans call for, who and what is booked where, and the three-week sheet for the site.

Three reports on the [Reports](#) page answer crew and equipment questions across projects: **Crew & equipment demand** (what the plans call for, and where that beats what you have), **Resource assignments** (who and what is booked on which project, day by day) and **Crew & equipment lookahead** (the three-week sheet a superintendent prints).

Where to find it

Open **Reports** in the sidebar (under Insights): the three make up its **Across projects** group. They also open from **Report on selected projects** on the [Projects](#) page, and from **Where are they?** or **Where is it?** on [Roster & equipment](#).

One set of words

Demand and Resource assignments count the same way everywhere they appear: on screen, in print, in the PDF, in the Excel workbook and in the copied text. The legend spells it out:

- *Need*: what the plan requires.
- *Unfilled*: no name or unit assigned yet.
- *Filled*: named on the task.
- *Have*: the company roster and fleet, minus anything down.
- *Short*: the amount needed beyond what is available.
- *Shared coverage*: the people and machines a [coverage set](#) shares are counted once.

People count by the day. Someone booked on [People](#) for only some of a task's days fills their place on that task on those days alone; on the task's other days the place counts as Unfilled. The manpower split, the Resource assignments board and its conflicts, and the names on the lookahead also read a booking on its own days only.

Crew & equipment demand

Crew and **Equipment** switch the whole report between trade demand and machine demand. **By project**, **By day** and **By week** choose what the chart's columns are: projects, days or Monday weeks. **Weeks** sets the window, from 2 to 26 weeks. A second toggle, **Stack**, chooses how the bars stack: **By**

project, or **By trade (By type for equipment)**. It is grayed out under By project, since the columns are already projects.

Under every chart, a by-project table gives each project's Need, Unfilled, Have and Short.

Have and the shortfall

Have here is the company roster and fleet, company-wide. It leaves out retired people and machines, anyone off or on leave, machines that are down, anyone or anything whose booked leave or out-of-service time covers that day, and a rented unit past its off-rent date. It counts whether or not anyone accepted a suggestion on [Crew planning](#); the extra capacity a project records there for subs and rentals is not included.

- A stepped *capacity line* crosses the chart wherever Have is known for that trade or type.
- A red *shortfall band* under the chart marks days where the need beats a known Have.
- For crew, the footer splits the supply into employees, subs and temps, for example `Employees 12 · Subs 4 · Total 16`.

When the roster carries no Have for a trade or type, the report says "No available capacity is recorded, so a shortage cannot be calculated." instead of the band, and the table's Have reads `Not recorded`. When the roster and fleet can't be read at all (local mode, the demo, or a failed load), it says "Company crew and fleet data are needed to compare availability. Showing planned needs only." and shows neither the band nor the split.

Named people

The **Crew allocation** table lists the people named on tasks. A name that matches an account is merged into one row; a typed name that matches nobody carries an **(unlinked)** badge, and a person booked by two projects on the same day gets an **overlaps** flag. This table reads each task's **Assigned To** across the task's whole span, not the days someone is booked, so a person booked by the day on two projects can read overlaps here while Resource assignments shows no conflict.

Unfinished past work

Below the chart, a panel lists incomplete tasks that were due to finish before the report's date. Their crew and equipment are *not* counted in the totals, because an overdue task adds nothing to this week's plan. The panel is there so the totals never quietly understate a slipping project.

The stamp and the version

Every copy of the numbers, on screen, in print, the PDF, the workbook and the copied text, carries a stamp such as `As of Mar 16, 2026 · 3 of 3 projects included`. When any included project has

had no progress update for 14 days or more, a third part says how many. A total is never mistaken for "every project, right now".

When a covered project is a Draft, the PDF, workbook and copied text also carry the report's publication line, in the screen's own words, for example `Latest plan · Route 9 Culvert is a Draft – crews see the plan published Sep 21, 9:00 AM`. It never lists what changed. A report whose projects are all Live prints nothing there. See [Draft and Publish](#).

Outputs

- **PDF...** prints the chart in color, the by-project table, the days with shortages, the unfinished past work and the conflicts list.
- **Excel...** writes a workbook with separate sheets: `By week`, `By day`, `By project`, `Shortfall`, `Deployment` (when people or machines are assigned by name) and `Conflicts`.
- **Copy** puts a plain-text summary on the clipboard: day headings, each project's crew, an unfilled count and a SHORT line. It is built for a text message from a site with no signal.

The workbook's layout

For anyone who reads the workbook with a script: the first sheet, `By week`, holds the legend, the stamp (with the publication line beside it in cell B2 when a covered project is a Draft), the demand caption, the line that says when capacity is unknown (blank otherwise) and the manpower split in rows 1 to 5, and its column headers in row 6. The `By project` sheet's first column header still prints as `Job`. Its Have column reads `Not recorded` where a project demands a trade or type whose capacity is not recorded.

Drill down

Click any demand cell that carries a number to see the projects and tasks behind it in the side pane. Each has **Open in schedule**, which opens that project in the editor with a matching filter already applied: the crew or equipment name, incomplete tasks only, and the dates you clicked. The filter is for that one visit and never overwrites your saved one.

Resource assignments

Resource assignments shows *who and what* are actually on which project, day by day. It reads what the schedule already plans; it doesn't send anyone anywhere.

- Rows are your company's whole roster and fleet: machines first, then people. A person or machine with nothing booked still gets a row.

- Your own home group comes first, other groups follow alphabetically, and rows with no home group come last. A row from another group carries a dim group tag, so a borrowed resource reads as borrowed.
- Columns are days up to three weeks, and Monday weeks beyond that.
- A blank working-day cell carries a faint wash: that resource has nothing booked that day. Weekend columns are shaded differently and are not an idle signal.
- A resource booked on two projects the same day gets an outlined conflict cell; hover it to see both projects. There is no drill-down pane on this board.
- The **Idle** list under the board names every row with nothing booked in the window.

Resource assignments needs a signed-in company with a fleet. In local mode or the demo the board says so instead.

Crew & equipment lookahead

A one-project, three-week landscape sheet: trades, then equipment, one column per working day, with the names and unit numbers under each count. On screen the report shows each chosen project's three-week window, for example `Sep 21, 2026 – Oct 9, 2026 · 15 working days`. **PDF...** prints the sheet; with several projects chosen it prints one project's sheet at a time and asks which. A project in Draft prints `DRAFT – not published to crews` in its header.

Honest limits

- Crew & equipment demand and Resource assignments each cover at most 15 projects. When the project set is cut short, the parts that need every project refuse rather than guess: `Only N of M projects are loaded. Choose fewer projects to get a complete answer.` That covers the PDF's conflicts section, the workbook's `Conflicts` sheet and the Idle list. Demand totals still show, stamped with the real N of M.
- The Resource assignments board reads only the loaded projects. A clean row means "nothing booked among the projects on screen", not "nothing booked anywhere".
- Counting is by whole working days; there are no shifts or part days.
- Two tasks needing the same trade on the same day both count, unless a coverage set joins them. The caption "planned demand (per task; shared coverage counted once)" rides with the legend on screen, in the PDF, the workbook and the copied text.

Who can use it

Anyone who can open Reports: every role but Field. The reports only read projects you can see. Have, the capacity line, the manpower split and Resource assignments need a connected company with its people and equipment on [Roster & equipment](#). See [Who can see and do what](#).

Shared coverage

A coverage set joins tasks in one project that share the same crew or machines, so the people and machines they share are counted once.

Two tasks that run side by side often use the same crew: the same four finishers pour the deck and then strip it. Counted task by task, that looks like eight people. *Shared coverage* tells Gantry that those tasks share their people and machines, so every count reads them once.

What a coverage set is

A *coverage set* is a named set of tasks, inside one project, that draw on the same trade or machine. You build it by hand. Gantry never guesses from matching names: two tasks that happen to need the same trade in the same week stay separate crews until you say otherwise.

While tasks are in a set, the requirement for each trade or machine type, on each working day, is the highest requirement among the set's own tasks that day. You can set your own number for a trade instead; clearing it goes back to *Automatic*, the computed number.

Where to find it

Shared coverage is built on the Schedule tab of a project:

- **Tools ▾ → Shared coverage...** lists the project's coverage sets. Each has **Edit...; + New set...** starts a new one.
- Or select the tasks in the grid, right-click, and choose **Shared coverage....** The set opens with those tasks in it, or, if they are already in a set, that set opens.

Making a set

The set's dialog has a **Name** and three parts:

- **TASKS:** the tasks in the set. **+ Add tasks...** adds more; each row can be removed. A task belongs to one set at a time; adding a task that is already in another set asks before moving it.
- **SHARED PEOPLE AND MACHINES:** **+ Assign people and machines...** picks the people and machines these tasks share. Picking one here fills every task in the set that needs that trade or type. Only what you pick here is shared; everything else on these tasks stays on its own task.
- **DAILY REQUIREMENTS:** one row per trade or type. Leave a row empty for Automatic, the highest requirement among the tasks in the set, or type your own whole number.

Save keeps the set. A set needs a name and at least one task.

What it changes

Every place that counts crew and equipment reads the same shared number:

- the Crew & equipment demand report, its PDF, workbook and copied text;
- the Crew & equipment lookahead;
- the Gantt crew band and Crew planning.

A member task's **Crew** cell carries a small brace mark; hover it for the set's name. Its crew popup and the task pane on Work read the shared people once, for example `2 of 2 filled · 1 more from Deck pour crew`, instead of counting a person twice.

Someone booked on People for only some of a task's days is shared only on those days. Once anyone in a set is booked that way for a trade, a member's crew popup and Work pane read that trade on the day with the most still to fill.

Double-booking warnings between the set's own tasks stop, because those people are meant to be on both. Every other conflict still flags as before: a shared person on an unrelated task, or a clash across projects.

What it never touches

- task dates, dependencies, or each task's own crew and equipment line. A task still prints its own line everywhere it already printed;
 - the cross-project conflicts on the **Resource assignments** board;
 - the **Have** column on Crew planning;
 - the schedule quality checks for unfilled requirements. A task with a short line of its own still flags, in a set or not.
-

Ungroup

Ungroup in the set's dialog dissolves the set. It asks first and says what changes, for example "Laborer goes from 4 a day to 8. Nobody is unassigned; every task keeps its own people and machines." Every task's own number comes back at once. Nobody was ever unassigned: a coverage set never removes a fill, it only changes how the numbers are read while the set stands.

Who can use it

Anyone who can edit the project's schedule; Field accounts can't. Picking shared people and machines needs a connected company with its roster and fleet on [Roster & equipment](#). See [Who can see and do what](#).

Good to know

- A coverage set lives inside one project; it can't join tasks from two projects.
- A project can have up to 40 coverage sets, a set up to 200 tasks, and up to 40 shared people and machines.
- My tasks still lists each task's own crew line, not the shared count; the Calendar and the Work page's cards show no crew count at all.

The project Dashboard

The Dashboard is a one-page readout of one project's progress and schedule checks, computed live from the schedule.

The Dashboard shows how one project is doing on a single page: how far along it is against plan, how it compares with the baseline, and how healthy the schedule is.

Where to find it

Open the project's **Dashboard** tab, beside its **Work** and **Crew planning** tabs, or choose **Tools ▾ → Dashboard** in the editor. On a phone, Tools is the way there. The project picker in the page head switches the Dashboard to another project without leaving the page, and **Open schedule** goes back to the editor. For the tabs beside it, see [Work](#), [My tasks and Calendar](#) and [Crew planning](#).

What it shows

Across the top, a line gives the project's status and the date it measures to (the data date, or today when none is set), then a row of tiles: percent complete, percent planned, the finish variance against the active baseline, the schedule checks score, the number of tasks and summaries, and the project's date window.

Under the tiles, cards:

- **Tasks by status:** how many tasks are complete, ahead, on track, behind or upcoming, plus the Work page's status counts when the crew uses them.
- **Planned vs actual:** bars for where the project should be and what has been reported.
- **Progress by area:** each area's planned and reported progress and its variance, with the areas finishing later than the baseline.
- **Baseline:** the overall finish variance and the tasks slipping most. With no baseline set, the card says so and offers **Baselines....** See [Baselines and variance](#).
- **Schedule checks:** the score and each failing schedule quality check. **Details...** opens [Schedule quality checks](#), where each row jumps to its task in the grid.
- **Cash flow:** when tasks carry costs, the budget, the value earned to date and the cumulative S-curve. See [Cost and cash flow](#).

Everything is computed live from the project: edits, undo and changes from other people redraw it as they happen.

Printing

Print produces a clean page in light ink.

Who can use it

Anyone who can open the project in the editor. Field accounts don't see the Dashboard. See [Who can see and do what](#).

Good to know

- A project with no tasks shows "Nothing to measure yet — add tasks and progress to see the dashboard."
- For several projects at once, use the [Projects page](#) or [Reports](#).

Draft and Publish: the plan crews see

Put a project into Draft to keep editing while crews keep seeing the plan you last published, then publish when it is ready.

🔗 Needs [Master planning](#)

Every project starts *Live*: crews see each save the moment it lands. When you are reworking a plan and don't want crews to follow every half-finished change, put the project into *Draft*. You keep editing and saving as normal, and crews keep seeing the plan from your last *publish* until you publish again.

Live and Draft

- **Live**: crews see every save as it lands.
- **Draft**: crews see the plan you last published. Your saves keep saving either way.

The views crews use all follow this choice: planner views, [crew links and itinerary links](#), the [Day plan](#), [Work](#), [My tasks](#) and the [Calendar](#). Project files are always the latest; a Draft does not hold them back.

While a project is in Draft, crews also keep the published plan's name, status, company, start date and task count until you publish, and their Home activity lists the project's saves only up to the published plan. A rename on a Live project reaches them at once, like any other save.

Where to find it

In the editor, **Tools ▾** → **What crews see...** opens the Live or Draft choice for this one project. The [master plan](#) publishes several projects at once with its own **Publish...**, and so does [People](#): its **Publish...** opens the same **Publish to crews** dialog with the Draft projects on the page.

While a project is a Draft, a second chip sits beside the save chip:

- **Draft · published 1:21 PM** while today's publish is still current (a date once the day has turned);
- **Draft · unpublished changes** once something new is waiting;
- **Publishing** while a publish is on its way, and **Publish failed – click to retry** if one didn't land.

Hover the chip to read exactly what crews see and what isn't in it yet. A Draft project also carries a **Draft** pill on the [Projects page](#), on [Home](#), on [Crew planning](#), in People's project legend and on the [Reports](#) page's publication line.

What crews see...

The dialog shows **Live** and **Draft** and, for a Draft, when it was last published, by whom, and how many saves have landed since. **See what crews see** opens the published plan as crews see it, read-only: a row's right-click offers only **Collapse** (or **Expand**) and **Copy**, and **Tab** moves on instead of indenting. The buttons change with what you pick:

The project is	You pick	The button
Live	Live	Close only
Live	Draft	Publish now and switch to Draft
Draft	Draft	Publish... , which opens Publish to crews
Draft	Live	Go Live , or Publish and go Live when there are unpublished saves

Going Live shows crews the live day notes; a change to the notes alone still reads **Go Live**.

Publishing

Publish to crews replaces the plan crews are seeing with the plan you have now. It is *all or nothing*: every project you are publishing goes together, or none do.

If someone else saved a project since you last loaded it, that row is refused with "These projects changed since you last loaded them". **What changed...** shows the difference, and **Include it anyway** publishes it regardless, so publishing without a look is still one click away but never silent.

Crew progress reports count as saves. A crew's own report (percent complete, work status, remaining, a checklist tick, an attachment) shows in the plan crews see at once, without waiting for a publish. A planner's changes to who is assigned, the checklist or the notes wait for the next publish.

That includes bookings made on People. The first booking into a Draft says so, for example **Bridge 12 is a Draft – crews see it after you publish.** A *stay*, which keeps a person on a project between tasks, is different: it reaches their Day plan and itinerary at once, without a publish.

Discarding unpublished changes

In **What crews see...**, **Discard unpublished changes** (or **Discard unpublished and go Live**) throws away everything saved since the last publish and returns the project to the plan crews are already seeing. It asks first, and your current plan stays in History as an automatic save, under the name of whoever saved it last, so **Restore...** can bring it back. Like any automatic save it rolls off once 30 newer ones arrive; **Keep this one...** on it makes it a saved version that stays.

If a colleague saved after the publish, the discard refuses and names them. That check looks only at the last person to save, so it can miss one, and says so. Whatever anyone saved is still in History under their name.

What a crew link shows

A crew's link carries a stamp so a foreman comparing it with a phone call knows which plan they have:

`Published Sep 21, 9:00 AM` while the project is a Draft, or `Live · updated ...` when it is Live. See [Crew links and itineraries](#).

Day notes

Tools ▾ → Day notes... (or the + on a day header in the master plan) keeps a dated list of notes for one project. Each note applies to **The whole project** (shown as *Every day*) or to one day. **Show this to crews** puts a note in what crews see; unticked notes stay internal. A project has one whole-project note and at most one note per day, each up to 2,000 characters.

- Unticking a note takes effect at once.
- On a Live project, a newly ticked note reaches crews at once.
- On a Draft, a newly ticked note reaches crews with the next publish, like any other change. It counts as an unpublished change of its own: the chip says so, and the next publish carries it even if nothing else changed.
- On a Draft, your own Today on site block shows the live ticked notes, what crews will see after the next publish; a crew's Work page shows the notes that were published.
- Switching a Live project to Draft keeps the notes crews were already seeing, and going Live never re-publishes notes, because crews read the live ones once the project is Live.

Crews see ticked notes on [Work](#), on crew links and handouts, and in the [Day plan](#).

Who can use it

Publishing is decided by the **Master planning** capability, not by role. Company admins hold it by role; a company admin grants it to other members (not a Field-only account) on **Company > Users & access → the Master planning** card. Only people with it can publish, switch a project between Live and Draft, discard unpublished changes, or restore an earlier version of a Live project from History. Everyone else can open **What crews see...** to read the choice, and can keep editing, saving and restoring a Draft; crews see those changes when someone with master planning publishes.

Any Admin or Editor can write day notes. Field accounts can't do either. Draft and Publish needs a connected company; it is not in local mode or the demo. See [Who can see and do what](#).

Good to know

- Assignment and status notifications to Field accounts wait while a project is a Draft. A blocked-task notice and a published notice always go out.
- Publishing, setting Draft or Live, restoring the published plan and granting master planning all appear in the company's **Recent activity**.
- A lookahead or Project progress PDF printed from a Draft carries **DRAFT – not published to crews** in its header.
- Restoring an earlier version of a Live project from History opens with **Switch to Draft first** picked: **Bridge 12 goes to Draft. Crews keep today's plan until someone publishes.** Its button reads **Switch to Draft and restore**. Pick **Restore now** instead and crews see the restored plan at once. A project a course uses as its template or answer key can't be switched to Draft: its confirm says so and offers no choice, and crews see the restore at once. For anyone without master planning the confirm only shows what would change, with its restore button grayed out, the line "Only an admin or a master planner can restore a Live project." and who to ask.

The master plan

The master plan lays several projects on one date axis, so you can plan them together, see who is double-booked, and publish them to crews at once.

🔗 Needs [Master planning](#)

The master plan puts several projects on one date axis, a few weeks at a time. You edit their tasks side by side, see the people and machines booked on two projects the same day, and publish the lot to crews in one go. It needs the **Master planning** capability; see Who can use it, below.

Where to find it

- the sidebar's **Master plan** row (under Planning);
- **Master plan** in the editor's **Tools ▾** menu;
- `Ctrl+M`;
- **Open in Master plan** on the [Projects](#) page, which hands over the projects you ticked.

The plan covers only its own company's projects: the company of the project open in the editor. A ticked project of another company stays off it, and the **Projects** list opens with one line that says so, for example "Tidewater Yard Paving is in Tidewater Paving — this plan is Northline Civil's. To plan it, open a Tidewater Paving project first."

It needs a wider screen. At 780 px wide or narrower, such as on a phone, it says "The master plan needs a wider screen." and offers **Projects** and **Work** instead of cramming three weeks of dates side by side.

Choosing projects

Projects in the action row (it shows how many are on the plan) opens a list of your projects to tick. Up to 8 projects can be edited together by default. A company admin can raise that to 15 on the **Master planning** card: **Allow up to 15 projects in the master plan**. "The default is 8. Above 8 the view is unmeasured; publishing still takes 15 projects at a time."

The **Group** filter (`Group: All` or a group's name) narrows the sections you see and edit. It never shrinks what **Needs attention** and **Double-booked** check: hidden sections still count.

The window

The window reads **From** a date for a number of weeks, from one to eight. A ninth week is refused out loud: "Up to 8 weeks. For a longer view use Crew planning or the 3-week look-ahead."

Two views

By project shows one section per project, its tasks on the shared date axis. You can edit the tasks right there, as in the editor. **Columns** adds % complete, Duration, Start, Deadline, Notes or one of the projects' own columns to every section. **Open in the editor** → takes you to one project's full schedule.

By resource shows the people and equipment the plans book, day by day, under a planned demand strip, so you can see who is where across the projects on the plan.

Saving and the side pane

Each project section carries its own save chip. A conflict in one project leaves every other section's edits untouched. A section with more tasks in the window than it can show says so, for example **300 of 412 tasks in this window – narrow the window**.

The side pane has two lists, both advisory: nothing in them blocks a save.

- **Needs attention:** sections that failed to save or to publish, with what to do next.
 - **Double-booked:** people and machines planned on two projects on the same day.
-

Day notes

The + on a day header opens the same Day notes dialog as **Tools ▾ → Day notes...**, already set to that day. See [Draft and Publish](#).

Publishing

Publish... opens **Publish to crews** for every section at once, with the same rules as publishing one project: all or nothing, and a project someone else changed since you loaded it is refused with **Include it anyway** beside it. The dialog adds a line about conflicts, for example **No conflicts in this publication** or **3 conflicts in this publication – 1 outside your window**. It never blocks the publish.

A project in Draft carries a **Draft** pill wherever it appears outside the master plan: on the Projects page, on [Home](#), on [Crew planning](#), in People's project legend and on the [Reports](#) page.

Printing

Print prints the master week and day sheets: every week the window touches, a day sheet for today (or the window's first day) and the day after, and **Choose days...** for any days you pick. See [Crew paper](#).

Who can use it

The master plan is for people with the **Master planning** capability. Company admins hold it by role; a company admin grants it to other members (not a Field-only account) on **Company > Users & access** → the **Master planning** card. Everyone else sees no door to it. It needs a connected company: local mode and the public demo have no master plan. The same gates open [People](#), which shares the master plan's **Publish to crews** dialog and print menu. See [Who can see and do what](#).

Good to know

- Publishing takes up to 15 projects at a time, whatever the master plan's own limit.
- Undo on the master plan works per project: click a project's section first.

Progress tracking and the Projects page

Record progress with a data date and actuals, then compare planned and reported progress across every project on the Projects page.

Progress in Ganttry is two things: the *data date*, the day your update is "as of", and what actually happened on each task (its actual dates, the work remaining and its percent complete). The Projects page then compares what each project *should* have done by today with what your team has reported.

Where to find it

- In the editor, **Tools ▾ → Update progress...** opens the progress dialog for the open project.
 - **Projects** in the sidebar, **Ctrl+J**, or **All projects** under Recent opens the Projects page.
-

Statusing: monthly updates

The **Update progress** dialog sets the project's **Data date (status as of)** and records each task's actuals in one place:

- the table lists the incomplete tasks scheduled to have started by the data date, with their scheduled dates;
- enter **Actual start**, **Actual finish** and **Remaining** (in working days, such as **3** or **3d**); blank fields keep their current values;
- **Use scheduled start** and **Use scheduled finish** fill a row's dates from the schedule;
- **Apply progress update** applies the whole round. One **Ctrl+Z** undoes all of it.

Clear stops using a data date. The dialog also has buttons for the [Schedule update narrative...](#) and the [Contract-day ledger...](#)

What the data date does to the schedule:

- completed work stays at its actual start and finish, even on non-working days;
- work in progress resumes no earlier than the data date, still following its predecessors;
- work not yet started is scheduled from the data date.

The Actual Start, Actual Finish and Remaining columns (hidden until you show them) stay in step with % complete. A task started out of sequence is flagged in its tooltip. The blue data-date line draws on the Gantt and in PDFs, and an MS Project file brings its status date and actuals in with it.

Save a baseline before your first update so you can measure slippage; see [Baselines and variance](#).

Project status

Every project has a lifecycle status: **Planning**, **Pending**, **Active**, **On hold** or **Complete**. Set it in **Project settings...** or by clicking the colored chip in the identity row. Active projects are tracked against their dates; Planning and Pending dates are treated as proposals, so they don't show as behind.

Crew and assignees on tasks

The **Crew** column records who a task needs, in plain words: `3`, `1 foreman, 2 laborer` or `laborer x2`. A trailing `?` marks crew you can't staff yet. [Crew planning](#) turns these lines into a day-by-day matrix.

Typing in the Crew or **Assigned To** column suggests what you have used before (the roles and names already in the project, most used first, plus your company's people when signed in). Picking a teammate's name links their account, so the task shows up in their [My tasks](#).

The Projects page

The Projects page is the management view across every project in the library. Its head reads **Projects** with a scope line such as `Northline Civil · All groups · 22 projects` and **+ New project**.

A summary strip across the top shows projects in progress, the average planned and reported progress, projects behind, and tasks that need a progress update. Click a figure to filter by it. The strip always covers the active projects in scope, whatever the filter.

The action row

Filter projects (press `/`), **Show: All** ▾ (by lifecycle), **Sort** ▾, **Behind only**, **Report on selected projects**, **Open in Master plan**, **Columns** ▾, **Print** and the **This week** pane toggle. On a narrow window the row folds into a `⋮` button. Projects group under **In progress**, **Starting soon**, then Pending, Planning, On hold and Complete.

The table

Each row shows the project (with a `Draft` pill when it is a [Draft](#), and pills such as `over contract`), its **Lifecycle**, **Planned progress** (the planned percent complete as of today, weighted by hours), **Reported progress** (the percent your team has entered, with a bar), **Tasks behind**, **Last progress update** and **Open schedule**.

Columns ▾ adds **Scheduled dates**, **Remaining workdays**, **Tasks needing an update**, **Schedule checks** (the share of the [schedule quality checks](#) that pass) and **Baseline finish**. Your pick is remembered on this device. At most 200 rows show at once; narrow the filter to see the rest.

One selection

The tick column is the page's one multi-selection. The ticks feed **Open in Master plan** (up to your company's master plan limit, 8 by default) and **Report on selected projects** (up to 15). Clicking a row selects it for the pane without opening it; double-click, Enter or **Open schedule** opens it. Keys: ↑ and ↓ move, Space ticks, Enter opens, **w** opens an Active project's Work view, **/** filters. Your filter, ticks, selection and scroll position come back after you open a project and return.

This week

On a wide screen the **This week** pane sits beside the list; on a narrow one, each row expands inline instead. Its head names the selected project with **Open schedule**, **Work view** (Active projects) and **Report on this project**. Under it: the site address, what crews see (for a Draft, the plan crews were last published), and the project's facts: dates, days left, group and, with a contract-day ledger, **N of M contract days charged**.

This week lists the tasks that should be under way that week, each with its planned percent, a state (Behind, On track, Ahead, Done or when it starts) and how fresh its percent is. A task counts as *behind* only when it has slipped more than half a working day, or it is past its planned finish and not done. A task under way with no percent edit in over a week is flagged as needing an update rather than silently trusted. Below that the pane totals the planned crew per working day (**Planned crew & equipment** once the project carries equipment) and lists the failing schedule checks. The < and > arrows step between weeks.

Updating progress

Edit % complete in the grid, or right in the pane's week list. Edits to the project open in the editor are normal undoable edits. Edits to any other project save only that progress, straight to the project (a pending edit shows **Saving...**, a refused one **Not saved** and goes back). Every edit records when it was made, which is what the freshness flags read.

Reports

Crew & equipment demand, Resource assignments, the lookahead and Project progress live on the Reports page. From here, **Report on selected projects** and the pane's **Report on this project** take you there.

Who can use it

Admins and Editors record progress and use the Projects page. Field accounts report percent complete, status and remaining work from [Work and My tasks](#); they can't open the Projects page or the Update progress dialog. See [Who can see and do what](#).

The schedule update narrative

The schedule update narrative drafts the written part of a monthly update, from what changed since the previous progress update.

A monthly update to an owner or a DOT usually comes with a written narrative: what got done, how the [critical path](#) moved, what changed in the schedule, and what is coming. Gantry drafts it for you from the schedule itself, and you edit it before you send it.

What it compares

Each time you move the data date forward in **Update progress...**, Gantry quietly keeps a compact copy of the schedule as submitted. The narrative reports everything that changed between that copy and the previous one, and names the period it covers (**Update period: ...**). See [Progress tracking](#) and the [Projects](#) page.

- Only the two most recent copies are kept. They live inside the project, so they follow it wherever it goes: the library, another device, a saved copy.
- Gantry takes at most one copy per calendar day, and only when the data date moves forward. Correcting the data date on the same day doesn't use up your comparison point.

Until an earlier update is saved there is nothing to compare, and the dialog says so: the first progress update saves a comparison point, and the next one can show what changed since.

Where to find it

- **Update progress...**, then **Schedule update narrative...**;
- the [Reports](#) page: **Schedule update narrative**, then **Open schedule update narrative...**

The dialog is titled **Schedule update narrative**.

What it writes

Four sections, each drafted for you and fully editable:

- **Progress this period:** how many activities completed and started, the overall percent movement, and earned value when tasks carry costs.
- **Critical path:** how far the forecast completion moved, in calendar days, and the activities that joined or left the critical path.

- **Schedule changes:** activities added or removed, duration changes, and logic changes spelled out link by link, for example `+ Mass excavation FS+2d`.
- **Delays, weather & upcoming work:** a 30-day look ahead, plus your own notes on delays. When the project keeps a contract-day ledger, this section also reports days charged against days allowed, the forecast, and the weather and suspension days logged this period.

Your edits are saved on this device, for this project and this data date. **Replace my text with Gantry's draft** throws your edits away and puts the drafted text back in all four sections.

Open PDF

Open PDF produces the narrative on letterhead, the same family as the schedule quality checks report, with the detailed change lists under each section. **Copy as text** puts the whole narrative on the clipboard, ready for an email body.

Who can use it

Anyone who can open the project in the editor. Field accounts don't see it. See Who can see and do what.

Good to know

- Because your edits are kept on this device, open the narrative on the same computer to pick up where you left off.

Contract days and weather days

The contract-day ledger counts the working days charged against a contract, records weather and other excepted days, and forecasts where the project will land.

Many contracts allow a number of *working days*, not a finish date. The contract-day ledger keeps that count for you: every working day charges itself, and you log the days that shouldn't count, such as a rain day, with a note. That day-by-day record is what a time-extension request needs.

Where to find it

- **Update progress...**, then **Contract-day ledger...**;
- the [Reports](#) page: **Contract-day ledger**, then **Open contract-day ledger....**

The dialog is titled **Contract-day ledger**.

Setting it up

Enter the contract's **Working days allowed**, any extension days granted (**+ extensions**) and the first chargeable date (**from**; it defaults to the project start). From then on, every working day on the project's calendar, through today, counts as charged unless you log an exception.

The summary line

The line above the calendar keeps the score, for example **Charged 42 of 120 working days (110 + 10 ext) – 78 remaining.** Then the forecast: how many more working days the current schedule needs, and whether that lands over, exactly on, or inside contract time. Then the days not charged, by reason.

Logging a weather day

Click any day in the month grid (< and > change the month) and choose why it isn't charged: **Weather**, **Suspension**, **Holiday** or **Other**, with a note such as "1.2in rain — grading suspended". Choose **Charged (no exception)** to take an entry back out.

Logging a day is pure contract accounting: it doesn't move the schedule. If the day should also stop work in the plan, tick **Mark as a non-working day**. That adds the date to the project calendar and reschedules the remaining work; removing the entry clears that calendar change too. A day you log always reports under its reason, even if someone changed the calendar since.

What it moves

- Charging stops at the scheduled finish once every task is 100% complete: a finished project stops using up days.
- The [schedule update narrative](#)'s "Delays, weather & upcoming work" section reports days charged against days allowed, the forecast, and the weather and suspension days logged this period.
- On the [Projects](#) page, the This week pane reads `N of M contract days charged`, adding `forecast N days over contract time` when the forecast runs over. The project's row carries an `over contract` pill.

Print ledger...

Print ledger... produces the day-by-day record on letterhead: date, running day number, status and note, the backup for a time-extension request. Idle weekends without an entry are left out.

Who can use it

Anyone who can edit the project. Field accounts never see contract time. See [Who can see and do what](#).

Good to know

- The ledger counts working days on the project's own calendar; see [Calendar standards](#) for company holidays and shutdowns.
- A note on a logged day can be up to 300 characters.

Schedule quality checks

Schedule quality checks run 16 checks adapted from the DCMA 14-point assessment and give the schedule a score before you submit it.

Before you send a schedule to an owner or a DOT, run the schedule quality checks. They look for the problems a reviewer looks for (missing logic, hard constraints, stale progress and the like) and give the schedule a score. The checks are adapted from the DCMA 14-point assessment.

Where to find it

- in the editor, **Tools ▾** → **Schedule quality checks...**;
- the [Reports](#) page: **Schedule quality checks**, then **Open schedule quality checks...**;
- the Dashboard's **Schedule checks** card: **Details....**

The dialog is titled **Schedule quality checks**.

The score

The dialog marks each check PASS or FAIL and sums it up in its first line, for example **88% – 14 of 16 checks pass**; its PDF and Copy report print the same line, under the project's name, the title and the dates. The same score is called **Schedule checks** wherever it appears: the [Projects page](#)'s column, the [Dashboard](#)'s tile and card, the [Company page](#)'s projects table and a [training course](#)'s Students table.

Checks whose inputs don't exist yet, such as the progress checks before you set a data date, don't count against you: they are left out of the score. Under the results, **Not checked (7)** lists each one with the reason it didn't run, for example **Work missing a progress update – needs a data date** or **Unstaffed crew – no task lists a crew yet**. The reasons:

Check	Not checked when
Invalid actual dates, Out-of-sequence progress	there is no data date and no task has an actual start or finish
Work missing a progress update	there is no data date
Stale progress	the project isn't Active
Unstaffed crew	no task lists a crew yet
Unfilled requirements	no task has bookings or equipment yet
Equipment with no crew	no task needs equipment yet

Percentage checks measure *remaining* work, so completed work doesn't fail the audit. Click any check that shows a task count, or Tab to it and press `Enter`, to list the tasks behind it, and click a task to jump straight to it in the grid. The dialog opens with the keyboard's focus on the first failing check that lists tasks, else on **Thresholds**.

Each check in plain words

Logic

Check	What it looks for
Missing logic	Unfinished tasks with no predecessor and no successor. The first start and the last finish are allowed.
Leads (negative lag)	Links with a negative <u>lag</u> (a wait between linked tasks). A lead can hide the true logic.
Excessive lags	Links with a lag longer than the limit. A cure time is fine; long lags hide scope.
Relationship types	Links that aren't <u>finish-to-start</u> . A schedule full of start-to-start, finish-to-finish and start-to-finish links is harder to follow.

Constraints & float

Check	What it looks for
Hard constraints	Unfinished tasks pinned by a Must-Start-On or Must-Finish-On date, which overrides logic and can hide slippage.
High float	Unfinished tasks with more <u>float</u> (days a task can slip before it delays the finish) than the limit, often a sign of a missing successor.
Negative float	Unfinished tasks that can't meet a deadline or finish constraint on the current logic.
High duration	Unfinished tasks with more remaining duration than the limit. Long tasks should usually be broken down.

Statusing

Check	What it looks for
Invalid actual dates	An actual start or finish after the data date: work can't have happened in the future.
Out-of-sequence progress	Tasks that started before their predecessors allow.
Work missing a progress update	Work under way that hasn't been updated as of the data date and, with a baseline, work the baseline expected to have started that shows no progress.
Baseline set	Whether the project has an active baseline to measure against.
Stale progress	Tasks under way whose progress hasn't been updated for longer than the limit (Active projects only).

The first three apply once there is a data date (the first two also once any task has actual dates). See [Progress tracking and the Projects page](#) and [Baselines and variance](#).

Resourcing

Check	What it looks for
Unstaffed crew	Unfinished tasks with a  crew entry: crew needed, nobody found. Applies once the project uses crew.
Unfilled requirements	Unfinished tasks whose crew or equipment still has an open slot. Applies once the project has equipment or assigned people.
Equipment with no crew	Equipment planned with no crew line at all, so no trade is asked for to run it. A crew line still to be found (marked ) still passes. Applies once the project has equipment.

A project with neither equipment nor assigned people scores exactly as it would without these last two checks. See [Crew planning](#) and [Equipment on tasks](#).

Thresholds

The limits start at the DCMA values. Open **Thresholds** in the dialog to change them; **Apply thresholds** saves them with the project, so a district's agreed tolerances travel with it, and **Reset to DCMA defaults** puts them back.

Sharing the result

Copy report puts a plain-text summary on the clipboard for an email. **PDF report** produces a letterhead document titled "Schedule quality checks", with the project and company, the failures flagged in red and the tables of tasks behind them. It survives email: it is the submittal copy. Both end with the same `Not checked` list as the dialog, each check with its reason.

Who can use it

Anyone who can open the project in the editor. Field accounts don't see it. See [Who can see and do what](#).

Work, My tasks and Calendar

Work, My tasks and Calendar are where crews run the plan, on a phone, a tablet or a desktop, and report progress without touching the schedule.

Three pages carry the plan to the people doing the work. **Work** is one project's task list for its crews. **My tasks** is your own assignments across every project. **Calendar** lays every project on a month or week. All three work on a phone and a tablet as well as a desktop, and progress you report there never rewrites the schedule.

On a phone or tablet

On a tablet, the three pages sit in the identity row at the top: **My tasks**, **Work** and **Calendar** for a Field account. On a phone, a bar along the bottom of the screen carries the same tabs, so you can switch with a thumb.

On a narrow screen or a touch device, each page's row of controls shrinks to icons and then to a single  button. The side pane starts closed (open it with its toggle), and rows grow tall enough to tap comfortably. On a phone, a task opens in a sheet that slides up from the bottom, and the Calendar's month grid becomes a day-by-day list.

Install it as an app

On a phone or tablet, in a signed-in session, the work pages offer **Install app**. On Android it installs Gantry like any app; on an iPhone or iPad it shows how to add Gantry to your Home Screen. The installed app opens on My tasks, always loads fresh over the network, and shows an offline page when there's no signal.

Work

Every project has a work view: open the project's **Work** tab. For an Active project, **Work view** on the [Projects page](#), or  on the project there, also opens it. Its head reads **Work**, with the project's name and **Open schedule**.

- The action row has a name filter (press ) , **Status ▾**, **Mine** and **Table** or **Board**. Board is a kanban board: drag cards between status columns. There **Status ▾** is grayed out, because the columns are the status filter; tap or click it and a note says so.
- Tasks group under their top-level phase and carry a work status: **To do**, **In progress**, **Blocked** or **Done**. Status and percent complete move together: Done means 100%; reopening a done task

steps it back to 99%; Blocked stays put below 100%; starting a task stamps its actual start with *your* local date.

- Click a task to open it in the side pane: its **Status**, **% complete**, **Remaining (days)**, notes, a checklist, link attachments and assignees, picked from the company roster or typed in. Beside the list, the pane stays in view and scrolls on its own, and each task you pick opens at its top.

With no task selected, the pane shows the project's summary, including a TODAY ON SITE block with the notes shown to crews for the whole project and for today. When the project has a site address, the pane shows it under the task. See [Draft and Publish](#) for day notes.

Crew and equipment on a task

A task that needs crew or equipment shows a Resources section in the pane, with a count such as **2 of 3** filled. Each requirement has **+ Assign person** or **+ Assign machine** and the people or machines already filling it. A chip marked **△**, a person shared with another task through [shared coverage](#), and a line that ends in **?**, such as **2 Laborer?**, each explain themselves when you point at them. On a touch screen, tap the name or the line and its sentence opens under the row, or above it when there is no room below; a **?** line's sentence is **Still to find**. It only fills or unfills what the task already asks for: requirements themselves are changed in the editor (see [Crew planning](#) and [Equipment on tasks](#)). A foreman can staff a task from here without opening the schedule. Field accounts see the same section read-only.

People are counted by the day. Someone booked on only some of a task's days fills it on those days alone, so a crew line reads its fewest-staffed day, such as **2 of 3 filled · unfilled on 1 of 5 days**, and their chip names their days, read-only, such as **Worker 015 · Mon–Tue**. **+ Assign person** here books a person for the whole task. To book by the day, Admins and Editors in a connected company use **Change days on People** →, which opens the [People](#) page with this task selected; it isn't offered on a student's copy or a class board in [Training](#).

Below Resources, **Tools needed** lists what the crew should bring. Admins and Editors add tools with its **Add a tool...** field and remove them with X; Field accounts read the list. See [Equipment on tasks](#).

My tasks

My tasks (the sidebar's **My tasks** row) lists your assignments across every project you can see. Group them by **Project** or **Due date**, filter with **Status ▼**, and use **Hide done**. Click a task to open it in its project's Work page, already selected.

- A TODAY card at the top of the side pane previews your [Day plan](#) for today and the Day plan's next day. That day is headed **TOMORROW**, or the weekday's name, such as **MONDAY** on a Friday. Each day lists the projects you are on that day. Under each project come its notes for crews that day (two lines, then tap to read the rest). Then come the tasks you are booked on, each with its dates and

that day's crew and equipment lines. On a day a planner keeps you on a project with no task, it says so, such as `On Bridge 12 · no task`. A day shows at most 8 tasks; a project that loses some to the limit says how many under its tasks, such as `+2 more`. Tap a task to open it in its Work page; **Day plan** → opens the whole plan. If the card can't read the Day plan, it keeps what it last showed and says `The Day plan didn't load. This card may be out of date.`

- **Day plan** opens your work day by day; see [The Day plan](#).
- The side pane counts your tasks by status (click a count to filter), lists **Projects with old dates**, and holds your **Notifications**.

Calendar

The Calendar (the sidebar's **Calendar** row) lays every project on a **Month** or **Week** grid, with a color per project, status filters and **Mine**. A project whose list may be out of date shows *Old dates* on its Week row and in the legend; tap or click the words to read why. **Today** and the < and > arrows move through time. Click a task to open it in its Work page. The side pane lists the selected day's tasks and a project **Legend** where you show or hide projects. Beside the month it scrolls on its own, and a day you pick opens it at its top. The Calendar prints cleanly with your browser's print command.

A Field user's day

A Field account is built for crews. It signs in straight to My tasks and sees its company's or group's projects with the money side taken out: no task costs, no contract time, no dollar figures in the narrative. From Work, My tasks and the Calendar a Field user reports progress (percent complete, status, remaining work, checklist ticks and link attachments) but never changes a project's structure. The editor, Home's Open a project page, Projects, [Reports](#) and [Roster & equipment](#) stay out of reach. A Field account has no sidebar: its identity row carries **My tasks**, **Work** and **Calendar**, and on a phone the bottom bar carries the same three. A Field account uses a full license.

Who can use it

Work and the Calendar are there in every session, local mode and the demo included; there the Calendar shows the open project. My tasks, **Mine** and **Install app** need a connected company. Admins and Editors reach the same pages from the sidebar and the project's tabs, and can change assignees from the task pane; Field accounts report progress only. See [Who can see and do what](#). Anyone without an account follows the plan through a [crew link](#) instead.

Good to know

- Everything you change on these pages saves only that change, never the whole project, and refreshes every open tab at once.
- Your Table or Board choice, whether the pane is open, and how you group My tasks and the Calendar follow your account between devices.
- My tasks and the Calendar read a list of tasks the app keeps up to date as projects are opened and saved. A project that hasn't been opened since its last save shows an *Old dates* hint rather than quietly stale dates; tap or click it to read "This list may be out of date. Open this project's Work view to refresh it."
- If the connection stalls, My tasks, the Calendar and the TODAY card stop waiting after 30 seconds and say so — for example `Could not load your tasks – check your connection`, with **Retry** — rather than load forever.
- For a Draft project, crews read dates and status from the plan they were last published.
- Work and My tasks don't print; use the Calendar, the [Day plan](#) or a report.
- My tasks still lists each task's own crew line; the shared count of a [coverage set](#) shows on the Work page's task pane.

Crew links and itineraries

A crew link shows a project's day plan on a phone without signing in, and an itinerary link shows one person's plan across every project they are on.

Crews get the plan two ways. People with an account sign in and use [Work and My tasks](#). Anyone else, such as a sub's foreman or a new laborer, gets a *link*: it opens the plan on their phone with no account and no sign-in. A *crew link* shows one project; an *itinerary link* shows one person's work across every project they are on.

On the phone and tablet

A link opens on today (a project not started yet opens on its first day), with a strip of the week's days, < and >, **Today**, **Day** or **Week**, and **Refresh**. Week is the default on a tablet or anything wider; Day is the default on a phone.

- Each day lists its tasks with their status, the crew and equipment each needs and who fills it that day, the tools each needs, the site address and the notes ticked for crews (under ON SITE).
 - Days that aren't working days and have no work are skipped: dimmed in the strip, and named once in Week view, for example `No work planned: Sat Sep 26 · Sun Sep 27`. A day with a note on it opens like any other.
 - Nothing refreshes on its own. The page reloads when you tap **Refresh**, or when you come back to it after half an hour. A screen left on, such as a TV in the trailer, keeps the day it opened on: tap **Refresh** each morning.
 - The foot of every view says "Needs a connection — the printed sheet is your backup." **Print crew handout** at the foot prints that backup; see [Crew paper](#).
-

What a crew link carries

- the plan crews were last *published* when the project is a Draft, the live plan otherwise, stamped `Published Sep 21, 9:00 AM` or `Live · updated ...` (see [Draft and Publish](#));
- task names, dates and status, each task's crew and equipment lines with the people and machines filling them that day, its tools, and your company's library columns (each named in the preview before you make the link);
- the site address, the whole-project note and the day notes ticked for crews;
- task notes, only when you tick **Include task notes**;

- never costs, attachments, checklists, the project's own custom columns or anything that identifies a record.

The address is the project's **Site address** from **Project settings....** A project without one shows no address on screen and prints `Site address not entered` on paper.

A link limited to dates carries names, crews, people, tools, columns and day notes only for work inside its dates. A task outside them shows its dates without its name.

Making a crew link

Open the project, then **File** → **Share....** The **Crew links** section comes right after People:

- 1 **Dates it shows:** **Whole project**, or a window running **From** one date to another.
- 2 **Link expires:** never, or in 7, 30 or 90 days.
- 3 **Include task notes** (off unless you tick it) and **Stop when the project is marked Complete**.
- 4 **Preview** shows the phone screen the crew will see, before anything is made.
- 5 **Create crew link**, then copy the link and send it however you like.

The Share dialog's **Active links** list shows a project's crew links and planner views, each with **Turn off**. It asks first, and a phone that already has the link open stops at its next refresh. A project holds at most 10 active links, crew links and planner views together. The older view-only link, which shows the whole project as planners see it, is behind **Make a planner view....** A planner view changes nothing: a row's right-click offers only **Collapse** (or **Expand**) and **Copy**; a column header's offers **Auto-fit width**, **Hide column** and **Show all columns**, which change that screen alone, and **Column guide...;** the chart has no right-click menu; and `Tab` moves on instead of indenting.

Itinerary links

An itinerary link is one person's plan across every project they are on. A company admin makes it on Roster & equipment: select the person, then in their **Itinerary** section use **Make a link...**, **Preview**, **Replace** or **Turn off**.

- It shows last week through eight weeks ahead, and moves forward each time it opens.
- Each day lists the person's projects, each with its address, and says `2 projects this day` when there are two. It covers up to 25 projects, soonest work first.
- A task the person is booked on for only some of its days shows on those days alone.

- A *stay* set on People keeps the person on a project between tasks. On a working day of the stay with no task for them anywhere, the itinerary still shows the project and its address, with **On Bridge 12 · no task**. A stay reaches the itinerary at once, without a publish.
- A person has one itinerary link at a time: **Replace** turns the old one off. Retiring the person turns it off for good.
- An itinerary never adds a day for a note alone.
- **Print itinerary** at the foot of the link prints it.

Roster & equipment's **Itinerary links** tab lists every active one.

Signed in

A Field account's Work page shows the project as it is, task notes included; a crew link shows less. The Share dialog's People section says so. The Day plan is the signed-in view of what a crew link shows.

Who can use it

Admins and Editors make crew links for projects they can edit; a Field account never does. Only a company admin makes itinerary links. Crew links and itineraries need a connected company. See Who can see and do what.

Good to know

- A link never expires unless you give it a lifetime.
- Anyone who has the link can open it, so send it only to the crew it is for, and turn it off when they no longer need it.

The Day plan

The Day plan shows your own work day by day across every project you are on, the same view a crew link gives, for anyone signed in.

The Day plan is your own work, day by day, on every project you are on. It is the signed-in version of what a [crew link](#) shows, for Field accounts and planners alike.

On the phone and tablet

The Day plan opens on today. Step through days with < and >, or tap **Today** to come back. Days that aren't working days and have no work are skipped, unless a note is dated that day.

Where to find it

On [My tasks](#), use **Day plan**, or **Day plan →** at the foot of the TODAY card. The card is a preview of this plan: today and the next day, each with your projects, their notes for crews and the tasks you are booked on.

The day and week layouts

- **Day** or **Week**: one day at a time, or the whole week.
- **Mine** or **Everyone**: *Mine* shows your own tasks. *Everyone* shows every task on the projects you have work on that day, with a **You** pill on yours. It never shows more than a crew link would.
- **Refresh** reloads the plan. If the connection stalls, the Day plan stops waiting after 30 seconds, keeps what it last showed, and says `Could not refresh the day plan – check your connection. Tap Refresh to try again.`

Each day lists the project's ON SITE notes, the same notes the Work page shows under TODAY ON SITE. Each task's crew line names the people booked that day, and its tools follow the equipment line.

A task you are booked on for only some of its days is yours on those days alone: *Mine* shows it only then, and *Everyone* puts the **You** pill on it only then.

When a planner keeps you on a project between tasks with a stay (see [People](#)), a working day of the stay with no task for you anywhere still shows that project and its address, with `On Bridge 12 · no task`.

Which plan it shows

The Day plan shows what crews see: for a Draft project, the plan crews were last published. A planner gets one line under that project's name, for example:

Draft — crews see the plan published Sep 21, 9:00 AM. Your latest saves are not in it.

Bookings are part of the plan, so on a Draft project new bookings reach the Day plan with the next publish. A stay shows at once, without a publish. See [Draft and Publish](#).

What prints

Print my week prints your own week on the same sheet as a crew handout, including days with a crew note, as the Day plan shows them. See [Crew paper](#).

Who can use it

Anyone signed in with a connected company: Field accounts, Admins and Editors. See [Who can see and do what](#).

Crew paper: the handout, the itinerary and the master sheet

Crew paper is the printed backup for the field, the crew handout, the itinerary, My week and the master week and day sheets.

A [crew link](#) and the [Day plan](#) need a connection. Crew paper is the backup: a printed sheet of the same plan, for the truck, the trailer wall or a site with no signal. Every sheet is a real PDF.

Printing from a phone or tablet

On a crew link, an itinerary link or the Day plan, the print button opens the PDF in your device's print dialog. When the browser won't open it in a new tab, it is saved as a file instead, so you can print or share it from there.

On every sheet

Every page carries a header with the project or person and the dates, the screen's own stamp (which plan it shows, `Published ...` or `Live · updated ...`), `Printed on:` with the time, and at the foot `The plan may have changed since this was printed.` with `Page N of M`.

Crew handout

Print crew handout is at the foot of a crew link, and in the Share dialog's preview, where the sheet carries your company logo when one is set. It prints the week on screen, cut to what the link shows:

- the project, the week, your company and the site address;
- the whole-project note and each day's notes ticked for crews;
- each day's tasks with their status, the `Crew:` line naming the people booked that day, the `Equipment:` line, then the `Tools:` line, and your company's library columns the link carries;
- task notes, when the link includes them.

When the week has more than one trade, a choice beside the button limits the sheet to one: **Whole crew**, or a trade such as *Laborer only*. The choice is made at print and never saved.

Itinerary

Print itinerary is at the foot of an itinerary link and in the [Roster & equipment](#) page's preview; **Print** in the person's **Itinerary** section prints it too. It prints the person's week: each day's projects, every project block with its address and its notes for crews, the person's tasks there, and the days with nothing planned. A day with two projects says so. A task the person is booked on for only some of its days prints on those days alone, and a working day of a stay with no task for them anywhere prints the project's block with `On Bridge 12 · no task`.

My week

Print my week in the [Day plan](#) prints your own week on the same sheet as the crew handout, including days with a crew note, as the Day plan shows them.

Master sheet

On the [master plan](#), the **Print** menu next to **Publish...** prints:

- the *week* sheet, for every week the window touches: projects down the side, Monday to Sunday across, with the work and names on each day and a person on two projects that day in amber, then a table of where every person and machine is each day;
- a *day* sheet for today (or the window's first day) and the day after: each project's work, the crew booked that day, equipment (then that day's `Tools:` line) and day notes, then where each roster person is;
- **Choose days...**: tick any of the window's days and they print as one PDF, a day sheet each, each numbered on its own. Ticking a week ticks its days with work or a day note.

Every row carries its site address, or `Site address not entered`.

When a project on the sheet is a Draft, the menu offers two plans. **What crews see** is the default and prints every Draft project's published plan. **Latest plan (Draft)** prints your latest plan with a DRAFT band on every page and each Draft row marked. See [Draft and Publish](#).

From People

On [People](#), **Print ▼** is the master plan's menu, and its sheets are titled `People`. A day sheet there covers only the projects with a named booking that day. Company admins also get **Itineraries for the people shown...**: pick a week, and each person shown prints on their own itinerary sheet, all in one PDF, up to 50 people.

Who can use it

Anyone who has the view can print it: a crew member with a link prints the handout or itinerary, anyone signed in prints My week, people with the **Master planning** capability print the master sheets, and anyone who can open People prints its sheets. See [Who can see and do what](#).

Good to know

- The sheets print the plan as it was when you printed. Check the stamp and the printed time against the screen.

Glossary

Plain definitions of Ganttry's terms, then of every column in the grid.

These are the words you meet in Ganttry and in construction scheduling, each defined once and linked to the page that explains it. [Terms](#) come first; every column — WBS, Total Float, Constraint and the rest — is defined once, under [Columns](#).

Terms

Admin, Editor and Field

The three roles a person can hold, set separately on each company or group membership, so you can be **Admin** in one and **Field** in another. An Admin manages the projects where the role is held and is the only role that can delete one; a company Admin also manages the company's people and groups; an **Editor** creates and edits projects; Field sees projects read-only, without costs, and reports progress. See [Who can see and do what](#).

Baseline

A frozen snapshot of the plan — every task's dates and duration — that you compare progress against later. Save one from Project settings with **Save baseline...**; keep up to 5 named ones, one of them active, which drives the [Start Var](#) and [Finish Var](#) columns and the gray bars drawn under the live bars on the Gantt. See [Baselines and variance](#).

Company

Your organization's account in Ganttry: its people, projects, groups and licenses. Company admins run it from the **Company** page in the sidebar. See [Companies, groups and roles](#).

Contract day

A working day charged against the working days your contract allows. The **Contract-day ledger** counts every working day of the project's calendar through today as charged unless you mark it as an exception, such as a [weather day](#), and forecasts whether the schedule finishes over or inside contract time. See [Contract days and weather days](#).

Coverage set

Tasks in one project that share the same crew or machine, joined by hand with **Shared coverage...** so the people and machines they share are counted once. Each working day the set needs the highest requirement among its own tasks, or your own number for a trade, and it never changes dates or links. See [Shared coverage](#).

Crew handout

The printed sheet a crew takes to site: **Print crew handout**, at the foot of a [crew link](#) or in its preview, prints the week on screen, cut to what the link shows, and can be limited to one trade. See [Crew paper](#).

Crew link

A link a crew opens on a phone with no sign-in, made in the **Crew links** section of a project's **Share...** dialog. It shows the whole project or a date window, from the plan crews were last published — the live plan when the project isn't a [Draft](#) — and never shows costs. See [Crew links and itineraries](#).

Critical path

The chain of tasks with no room to slip: delay any one of them and the project finish slips, or a deadline or constraint is missed. A task is critical when its [Total Float](#) is at or below the [critical threshold](#), which is 0 by default, and never once it has an actual finish; the toolbar's **Critical** button highlights critical tasks in red. See [Scheduling](#).

Critical threshold

How much Total Float a task can have and still count as critical, in working days, set in Project settings under **Critical total float (working days)**. At 0, the default, you see the classic critical path; a higher number also highlights near-critical work that still has some float, so you see trouble coming. See [Scheduling](#).

Data date

The "as of" date progress is measured against, set in **Tools ▾ → Update progress...** when you record what actually happened. Recorded actuals stay where they happened, unstarted work schedules from the data date, and a blue line marks it on the Gantt. See [Progress tracking and the Projects page](#); to do it, [Update progress and the data date](#).

Day plan

Your own work day by day on every project you're on, opened from **My tasks → Day plan**, for Field users and planners alike. It shows what crews see — a Draft project's published plan — and prints your week with **Print my week**. See [The Day plan](#).

Draft and Publish

How someone with the [Master planning](#) capability decides what crews see. Every project starts Live, so crews see each save as it lands; put it in Draft from **Tools ▾ → What crews see...** and you keep saving while crews keep the plan from your last publish, until you publish again with **Publish....** See [Draft and Publish](#).

Employee number

A person's number from your payroll or HR system, kept as **Employee #** in their pane on the [Roster & equipment](#) page and seen only by company admins. It is unique in the company, retired people included, and it is how **Import file...** recognises a person when their name is spelled differently in the file.

Equipment type and unit

A machine type, such as "135 Excavator", is what a task asks for, with a quantity (**2x 135 Excavator**); a unit is one real machine in your company's fleet, with its own unit number, that you assign to fill that need. The fleet and the list of machine types live on the [Roster & equipment](#) page, and a task's needs in its [Equipment](#) column. See [Equipment on tasks](#).

Group

A part of a company, such as a region or a division. Every project belongs to exactly one company or group, and a membership in a group lets you open that group's projects. See [Companies, groups and roles](#).

Itinerary

One person's plan across every project they're on, as a link they open with no sign-in: last week through eight weeks ahead, day by day, each project with its site address. A company admin makes it from **Roster & equipment** → the person → **Itinerary**, and it prints as a sheet too. See [Crew links and itineraries](#).

Lag

A wait between two linked tasks, in working days, typed after the link in the [Predecessors](#) column: **12FS+3d** starts this task 3 days after task 12 finishes. A negative lag is a lead: **14SS-2d** starts this task 2 days before task 14 starts. See [Scheduling](#).

License

What each person with access to your company uses: every user who isn't disabled and belongs to the company or any of its groups uses one, counted once, Field users included, and a pending invitation holds one. Partner staff use none. Company admins see the count and buy more in **Company > Billing & licenses** (a partner adds them for the companies it looks after); see [Licenses and billing](#).

Link types (FS, SS, FF, SF)

The four ways one task can depend on another, typed in the [Predecessors](#) column. FS, finish-to-start, is the normal case — a bare **12** means task 12 finishes, then this one starts; SS, start-to-start, lets this task start once 12 starts; FF, finish-to-finish, means it can't finish until 12 finishes; SF, start-to-finish, is rare. See [Scheduling](#).

Lookahead (3-week)

The superintendent's view: **Views** → **3-week lookahead** shows only the incomplete work that overlaps the next 21 days, for you alone, and the PDF export prints it as a one-page lookahead sheet. Reports also has a **Crew & equipment lookahead** across projects. See [Filters, saved views and the 3-week lookahead](#).

Master plan

Several projects on one date axis — up to 8 at a time, or 15 if a company admin allows it — seen **By project** or **By resource**, and published together. Open it from the sidebar, **Tools** ▾ or **Ctrl+M**; it needs the [Master planning](#) capability and a wide screen. See [The master plan](#).

Master planning

The capability that lets someone put a project in Draft, publish plans to crews, restore an earlier version of a Live project, and open the [master plan](#) and [People](#). Company admins have it by role, and a company admin can grant it to other members, though not to a Field-only account, on **Company** > **Users & access**, in the **Master planning** card. See [Who can see and do what](#).

Milestone

A zero-length marker for a moment rather than work, such as "Notice to proceed". Give a task a [Duration](#) of 0 and it becomes a milestone, drawn as a diamond on the Gantt. See [Scheduling](#).

My tasks

The tasks you're assigned to, across every project you can see — the sidebar's **My tasks** row, and where a Field user lands on signing in. Group them by project or due date, and open the [Day plan](#) from there. See [Work, My tasks and Calendar](#).

Partner

A reseller that sets up and looks after client companies on Gantry. Partner staff have full admin powers in every company their partner looks after, use no license, and have their own partner dashboard. See [The partner program](#).

Per-day booking

A booking that puts a person on only some of a task's days, made on the [People](#) page. The person counts toward the task's [Crew](#) on those days alone, so the Work page reads a crew line by its fewest-staffed day, such as **2 of 3 filled · unfilled on 1 of 5 days**, and their [Day plan](#) shows the task only on those days. It never moves the task's dates, and keeps its own days if the task moves. + **Assign person** on the Work page or in **Crew & equipment...** books the whole task instead. See [Book people day by day](#).

Project

The thing you plan — its tasks, dates, crews and files — which lives in one company or group. The app calls it a project everywhere: Projects, **+ New project**, **Open a project** and project templates. See [Creating a project](#).

Project template

A saved starting point for new projects, made from a project with **Save as a project template...**: it keeps the outline, durations, links, calendars (without their one-off dates), crew and equipment needs and columns, and clears everything project-specific, such as progress, actuals and baselines. **New project** offers templates by [project type](#) and re-dates everything from the start date you type. See [Project types and templates](#).

Project type

A way to group a company's project templates. When you pick a type in **New project**, its default template is offered first; company admins manage types in **Company > Standards**. See [Project types and templates](#).

Quality check

One of the 16 checks in **Schedule quality checks** — an audit adapted from the DCMA 14-point assessment many owners and DOTs hold schedules to — such as missing logic, hard constraints, high float or stale progress. The share that pass is the project's score, which the app calls **Schedule checks**. See [Schedule quality checks](#).

Saved crew

A named group of people, usually a foreman and the people who work with them, kept on the **Saved crews** tab of [Roster & equipment](#) so you can book them together: **Book crew...** on the People page puts each person on the first open line of their trade, one task a day. Projects keep the people, not the crew, so renaming or retiring a crew changes no project. Company admins and holders of [Master planning](#) manage crews. See [People](#).

Saved version

A project's whole plan, kept under a name in the **Saved versions** list of its History, to look at, compare with today's plan or restore. Make one with **Save a version...** from the save chip or **Tools ▾**, or keep an automatic save with **Keep this one....** It stays until someone deletes it; a project keeps up to 20, or 5 in this browser without a company account. See [Saving, history and opening projects](#); to do it, [Find and restore an earlier version](#).

Saved view

A named view you apply in one click: **Views → Save current view...** keeps the current filter, the visible columns and the Gantt zoom. Signed in to a company account, saved views follow your

account to any device; without one, they stay in that browser. A filter only changes what you see, never the project. See [Filters, saved views and the 3-week lookahead](#).

Schedule

In Gantry, a project's Gantt view — its first tab, **Schedule** — and the dates it shows; the thing you plan is a [project](#). To schedule is what Gantry does with your work: it works out the dates from durations, links and calendars. See [Scheduling](#).

Stay

A person kept on a project between tasks, made on the People page with **Through the end of the project** or the foreman's tick when you book a [saved crew](#). It runs to the project's end until someone chooses **End stay...**, which leaves the bookings as they are. People marks **no task** on each working day of the stay where they have no task anywhere, and on those days their [Day plan](#) and [itinerary](#) still show the project and its address, without a publish. See [People](#).

Summary task

A task with subtasks indented under it (select the rows below it and press **Tab**). Its dates, progress and cost roll up from its subtasks. See [Editing in the grid](#).

Training course

A course a company admin runs from **Company > Training** once training is turned on: each student signs in with their own student account, which uses a license, and practices on their own copy of the course's template, an ordinary project the trainer picks. The trainer can compare every copy with an answer key. See [Training](#).

Unit number

The number that tells one machine in your fleet from another, such as **412** or **EX 12**, shown as **Unit #** on the [Roster & equipment](#) page. No two active machines can share one; case and extra spaces don't count as a difference, leading zeros do. A retired machine's number can be used again. See [Equipment type and unit](#).

Weather day

A day you mark **Weather** on the **Contract-day ledger**, with a note, so it isn't charged against contract time — the day-by-day record a time-extension request needs. Ticking **Mark as a non-working day** also changes the project calendar and reschedules the remaining work. See [Contract days and weather days](#).

Work

A project's work view — its **Work** tab — where crews run the project: tasks by phase in a table or on a board, each with a [Status](#) tied to % complete, and a side pane for notes, checklists and who is

assigned. See [Work, My tasks and Calendar](#).

Working day

A day a task's calendar works. Durations, lags, float and variance all count working days, so weekends, holidays and shutdowns are skipped — a duration of 5 is five working days — and each task follows the project calendar unless its [Calendar](#) column names another. See [Scheduling](#).

Columns

IDENTITY
<div><div>WBS</div><div>Set by Ganttry</div></div> <p>Shows the task's place in the outline — Ganttry sets this number automatically when you indent or outdent tasks.</p> <p>e.g. 1.3.2</p>
<p>Activity ID</p> <p>Short code for calling out activities in the field or matching a P6 schedule; renumber the whole column from its header menu.</p> <p>e.g. A1030</p>
<p>Task Name</p> <p>Describes the work — this is what shows for the task in every other view.</p> <p>e.g. Pour footings — east wing</p>

DATES
<p>Start</p> <p>Scheduled start date. Entering one sets the earliest allowed start (Start No Earlier Than) on a leaf task — a floor, not a pin. An existing Must Start On date moves there instead. Read-only on summary rows; refused once actual dates are recorded.</p> <p>e.g. Mar 3, 2026</p>
<p>Finish</p> <p>Scheduled finish date; entering one changes the duration — longer or shorter — so the task ends that day.</p> <p>e.g. Mar 12, 2026</p>
<p>Constraint</p> <p>The date pin on the task (start-no-earlier, must-start-on, finish-no-later, must-finish-on) — set through the Constraint & deadline dialog.</p> <p>e.g. SNET Mar 3</p>
<p>Deadline</p> <p>A finish target that never moves the schedule — a task landing past it shows negative float instead.</p> <p>e.g. Jun 30, 2026</p>

Actual Start

The day work really began. Recording one takes priority over constraints and planned start edits. Clear it only if it was entered by mistake.

e.g. Mar 4, 2026

Actual Finish

The day work really finished — recording one marks the task done. Clear it only if it was entered by mistake.

e.g. Mar 15, 2026

PROGRESS & TRACKING

% Comp.

How far along your team reports the work is, 0–100. Summary rows combine their subtasks' progress; longer tasks count more.

e.g. 60

Status

Field status of the task: To do, In progress, Blocked or Done.

e.g. In progress

Remaining

Working days of work left on a started task. Entering a number replaces the estimate that % complete alone would imply.

e.g. 3d

Start Var Set by Ganttry

Working days the current start has slipped past the active baseline; negative means ahead of plan.

e.g. 2

Finish Var Set by Ganttry

Working days the current finish has slipped past the active baseline; negative means ahead of plan.

e.g. -1

Notes

Free-form notes on the task — RFIs, hold reasons, whatever the field needs to know.

e.g. Waiting on rebar delivery

SCHEDULING & LOGIC

Duration

Working days the task takes; 0 makes it a milestone.

e.g. 5d or 2w

Hours

The same duration expressed as work-hours, converted through the calendar's hours per day.

e.g. 36h

Predecessors

Which tasks must happen first, with the link type and any lag.

e.g. 12FS+2d

Successors

Which tasks follow this one — the same links seen from the other end.

e.g. 14SS

Late Start Set by Gantttry

The latest the task could start without delaying the project — computed by the scheduler.

e.g. Mar 6, 2026

Late Finish Set by Gantttry

The latest the task could finish without delaying the project — computed by the scheduler.

e.g. Mar 17, 2026

Total Float Set by Gantttry

Working days of slack before this task delays the project — 0 means it's on the critical path.

e.g. 0

Free Float Set by Gantttry

Working days this task can slip before it delays the next task.

e.g. 2

Calendar

Which named work calendar the task follows; blank means the project default.

e.g. 6-day paving crew

Work Pattern

Choose specific workdays or a number of working days per week for this task — set it from the task's right-click menu.

e.g. Mon+Wed+Fri

COSTS & QUANTITIES

Quantity

How much of the work there is, in whatever unit you type.

e.g. 1,500 SF

Cost

Money against the task; summary rows roll up their subtasks.

e.g. \$12,500

CREW, PEOPLE & EQUIPMENT

Crew

The crew you plan to put on it — roles and head-counts; feeds the crew loading band under the Gantt.

e.g. foreman, 3 laborer

Assigned To

The actual people on the task — linked names show it on their My tasks list.

e.g. J. Alvarez

Booked

The people and machines booked on the task, with their days. You can't type here: book people in People or with Shift+F2.

e.g. Laborer: Sal Rinaldi, Worker 014

Equipment

Machine types this task needs, with how many — a model number like "135 Excavator" is the machine, so write "2x" in front when you need more than one; pick types and assign machines with Shift+F2.

e.g. 2x 135 Excavator, Roller

Tools

Tools the crew should bring. Printed on the handout, not tracked.

e.g. Level, String line, Form oil

HISTORY

Created Set by Gantry

When the row was added, stamped automatically. Blank for older rows created before Gantry tracked this date.

e.g. Aug 28, 2026

Created by Set by Gantry

Who added the row. Blank when working without signing in.

e.g. R. Alvarez

Modified Set by Gantry

When the row's content last changed. Layout changes, such as column width, do not count.

e.g. Aug 28, 2026

Modified by Set by Gantry

Who last changed the row's content.

e.g. R. Alvarez

CUSTOM COLUMN TYPES

Add your own columns from the grid header menu → Add or show columns...

Text

Type task details — free-form text, like a Notes column of your own.

Checkbox

Mark yes or no for each task.

Dropdown list

Choose one option from a list you create — you can edit the list later. If you remove an option, tasks that used it keep showing it until you edit them.

Symbols

Choose a check, cross, warning, flag or other symbol. Exports show its name.

Keyboard shortcuts

The keyboard shortcuts the app lists, then the keys each page shows along its foot.

This is the same list the app shows: click **?** in the top row, then **Keyboard shortcuts...** — it is also in your avatar menu and, in the editor, under **Tools ▾**. At the foot of the list, **Print...** opens the cheat sheet PDF, whose second page is every shortcut, ready to pin up in the site trailer, and **In the manual** opens this page in a new tab. You can also download the PDF from the [cheat sheet](#) page.

The app's list

Keys	What they do
Enter / F2 / type	Edit the selected cell (Enter finishes the edit and moves down)
Tab / Shift+Tab	Indent / outdent selected tasks
Tab (while editing)	Finish the cell edit and move right
Alt+↑ / Alt+↓	Move selected tasks up / down
Drag row number	Rearrange tasks (multi-select drags as a group)
Shift+click / Ctrl+click	Select a range / toggle rows
Ctrl+C / Ctrl+X / Ctrl+V	Copy / cut / paste tasks (groups keep their links; pastes into Excel too)
Ctrl+= / Ctrl+-	Insert / delete task
Ctrl+L	Link selected tasks finish-to-start
Ctrl+B / Ctrl+I / Ctrl+U	Bold / italic / underline selected rows (Format ▾ adds strikethrough)
Delete	Clear cell (clears a Start cell's constraint)
Ctrl+Z / Ctrl+Shift+Z	Undo / redo
Ctrl+F	Find tasks
Ctrl+O	Open a project (File ▾ → Open project...)
Ctrl+J	Projects page (all projects, progress, this week)
Ctrl+H	Home — projects, recent changes, reference
Ctrl+M	Master plan — several projects on one date axis
Ctrl+S	Save a copy to a JSON file (File ▾)
Ctrl+A	Select all visible tasks
Ctrl+scroll (Gantt)	Zoom the timeline
Drag bar / edge / past end	Move task / change duration / draw a link
/	Focus the filter box on any page that has one
Enter	Open the project, or show the row's details in the side pane
Esc	Clear the filter, close the menu, or deselect the row

Keys	What they do
PgUp / PgDn	Calendar — previous / next month or week
← / →	Calendar — move a day; Work board — move a column
Shift+F2	Open Crew & equipment... for the active row (grid)
Space	Projects — tick the row (the selection Master plan and reports use)
Esc, then Tab (grid)	Leave the grid (Tab alone indents)
Alt+Shift+- / Alt+Shift+=	Collapse / expand the selected summary rows (grid)
Ctrl+Shift+V	Paste as new rows below the selection, not over cells (grid)
Alt+click a bar	Split the task at that day (Gantt)
Space (checkbox cell)	Tick or untick the cell (grid)
Ctrl+K	Go to a page, a command or a project
↑ / ↓, Enter, Esc (Go to)	Move through the list, open a row, or close Go to

On each page

These pages show their own keys in the status strip along the bottom of the page; here they are, page by page.

Page	Keys
Home	↑↓ move · Enter open · ⋮ actions · s star · / search
Open a project	Type to search · Enter open · ⋮ actions · Esc back
Work	↑↓ move · Enter details · Esc deselect · / filter
My tasks	↑↓ move · Enter open · / filter
Calendar	PgUp/PgDn month · ← → day · t today · m / w view · Enter select
Calendar (week)	PgUp/PgDn week · ← → day · t today · m / w view · Enter open
Projects	↑↓ move · Space selects · Enter opens · w work view · / filter
Master plan	↑↓ move · Enter edit
Day plan (day)	← → day · t today · d / w view · ↑↓ move · Enter open
Day plan (week)	← → week · t today · d / w view · ↑↓ move · Enter open
Roster & equipment	/ filter · ↑↓ move · Enter details · Esc clear
Crew planning	/ filter · < > shift · Enter details · Esc clear
People	/ filter · < > shift · Enter book · Esc clear

Questions and answers

Short answers to the questions people ask most about Gantry, each with a link to the page that explains more.

I removed a dropdown option — why do old tasks still show it?

Removing an option from a [Dropdown list](#) column changes only the list you pick from: tasks that already used it keep showing it until you edit them.

Gantry asked me to reload — why?

A newer version of Gantry has saved this project, and your tab is still running the older version. When it opens a project the newer version has saved, or tries to save over one, it stops with "This project needs a newer app version" and a **Reload** button, and the message can't be dismissed, because the older version would drop details it doesn't know about. Reloading loses any changes in that tab that haven't saved yet. If you see "This server is running a newer app version than this tab loaded" instead, **Continue anyway** lets you carry on, but reload before you make changes you don't want to risk losing. How saving works: [Saving, history and opening projects](#).

My webhook address is refused.

Gantry sends webhooks only to a public address that starts with `http://` or `https://`. A URL that points to a private or local network address is refused with "Enter a public webhook URL. This one points to a private or local network address." Gantry doesn't follow redirects either — a delivery that gets one counts as failed — so give your receiver's final URL. See [Integrations: webhooks and the read-only API](#).

What happens to our data if we cancel?

When your company's subscription is canceled, its data stays for at least 60 days; in the words of the [Terms](#), "your schedules remain available for 60 days so you can take copies, then they are deleted". Your company admins get a reminder by email a week before the deletion date, so export anything you need then. To keep the company, reply to that reminder and the deletion is put on hold; buying again on the website starts a separate, empty company. See [Licenses and billing](#).

Can I open an .mpp file?

Not directly: an `.mpp` file is Microsoft Project's own closed format. In Microsoft Project, save the project as XML (File → Save As → XML), then bring that file in with **File ▾ → Import file...**: tasks, links, deadlines, progress and calendars come across, and so do four constraint types (must start on, start no earlier than, must finish on, finish no later than); the others are skipped with a warning. See [Importing a project](#).

Do imported MS Project calendars keep their hours?

Every calendar takes the file's project-wide hours per day, not hours of its own. The project calendar comes across with its working weekdays and its holidays (non-working exception days). So does each task calendar at least one task uses, as a named calendar; extra working days, and anything a calendar inherits from a base calendar, are not imported. At most 20 task calendars import — tasks on the others use the project calendar, and the import warns you. See [Importing a project](#).

Why can't some people see costs?

People with the **Field** role see their projects read-only with the money side taken out — task costs, contract time and the dollar totals in the schedule update narrative — while still reporting progress. Crew links never show costs either. An **Editor** or **Admin** sees them; see [Who can see and do what](#).

Who can publish the plan?

Anyone with the [Master planning](#) capability. Company admins have it by role, and a company admin can grant it to other members (not a Field-only account) on **Company > Users & access**, in the **Master planning** card; it also opens the master plan and [People](#), which both have **Publish...** See [Who can see and do what](#) and [Draft and Publish](#).

How do crew members see their work without an account?

Send them a [crew link](#). In the project's **Share...** dialog, under **Crew links**, choose the dates it shows and when it expires, check the **Preview**, then **Create crew link**; the crew opens it on a phone with no sign-in. It shows the plan crews were last published — or the live plan, if the project isn't a Draft — with task names, dates, status, crew, equipment and tools, and never costs. For one person across all their projects, a company admin makes an [itinerary](#) link instead; see [Crew links and itineraries](#).

How do I change my name or email?

Open your avatar menu and choose **Profile...**: a new name saves at once. A new email asks for your current password, then mails a confirmation link to the new address, and nothing changes until you press **Confirm new email** on the page that link opens. A company admin can also correct your name or email with **Edit...** in the Users table. See [Your account](#).

I forgot my password.

Click **Forgot password?** on the sign-in page and enter your email to get a link that sets a new one. If no email comes, ask a company admin: they can make you a reset link, which works for one hour, from **Company > Users & access**. Setting a new password makes any earlier invitation or reset link stop working. See [Your account](#).

How big a project can Gantry handle?

Projects of several thousand tasks: the grid draws only the rows on screen and the Gantt only the bars in view, so a 3,000-activity P6 import edits as fast as a 50-task project. The public [demo](#) is the exception — adding, pasting or importing tasks there stops once a project has 60. See [Importing a project](#).

Does Gantry work on a phone?

Yes. On a phone a bottom bar switches between the main views — **Home · Schedule · Projects · Work · Calendar**, or **My tasks · Work · Calendar** for a Field user — the editor shows the grid or the chart one at a time, and the larger dialogs open full screen. The work pages also offer **Install app** so Gantry opens from your home screen, and the master plan needs a wider screen: it won't edit at 780 px or narrower. See [On phones and tablets](#).