Create and organize Planning tasks

Posted on November 12, 2026 by Smaheine

From the **Tasks** tab, you can create and organize the different elements that make up your Planning.

Click the **+** button, then choose the type of element to create.

Create a task

A **Task** represents work to be completed over a defined period.

For example: *Heating system installation*.

You can in particular fill in:

- the title;
- the Start date;
- the duration;
- the End date;
- the Work package;
- the description;
- the category.

The End date is calculated based on the Start date, duration, and working days.

Create a task summary

A **Task summary** allows you to group multiple tasks together.

For example, you can create a Task summary called **Second stage works**, then attach all corresponding tasks to it.

To attach a Task to a Task summary, use the **Part of** Field.

Subtasks then appear under their Task summary with hierarchical numbering, for example **3.1**, **3.2**, etc.

The Task summary period automatically adjusts to the dates of its subtasks.

Organize the Planning by region or work package

Task summaries can notably be used to structure your Planning by:

- Region

Create a milestone

A **Milestone** represents a specific event with no duration.

It can for example correspond to:

- the Acceptance of a Work package;
- the validation of a phase;
- a Handover;
- an important meeting.

A Milestone has a single date.

Filter tasks

The **Filter** button, located below the task list, allows you to limit the displayed elements to more easily find the information you are looking for.