

Automatic Date Calculations

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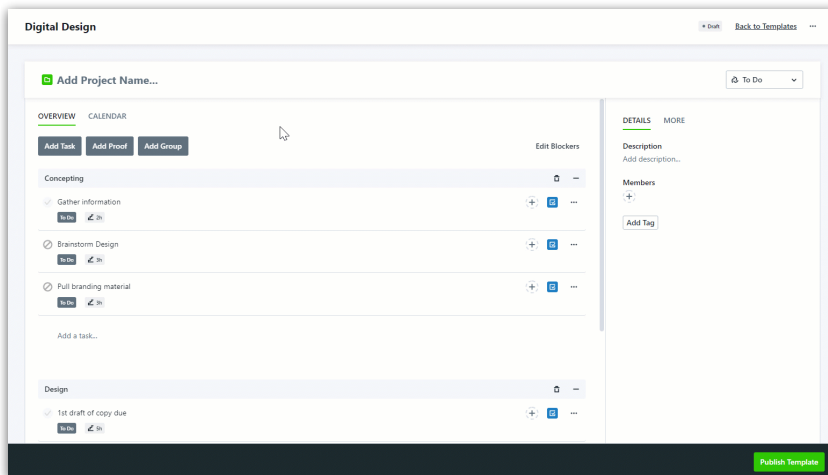
Automatic Date Calculations help creative teams get started on projects faster by automatically calculating start or due dates for work within a project based on your specifications. Associating dates to your project templates is both robust and flexible, letting you customize your workflow based on your team's project management model.

**Automatic Date Calculations are only available for Business and Enterprise customers.*

Adding Automatic Date Calculations

Automatic Date Calculations are built in at the project template level, then automatically adjust either the start or due dates in tasks and proofs in any new projects created from that template.

To get started, from the project template editor select **CALENDAR** and the **Don't calculate dates** dropdown menu to select how you'd like to calculate dates in this template.



We have a few options to calculate our dates:

Due Dates Calculated from Project Due Date: Schedule your project by working backwards from your due date to configure your due date.

Due Date Calculations from Project Start Date: Schedule your project by starting with the first work item to configure your due date.

Start Dates Calculated from Project Due Date: Schedule your project by working backwards from your due date to configure your start date.

Start Dates Calculated from Project Start Date: Schedule your project by starting with the first work item to configure your start date.

No Calculated Dates

Due Dates Calculated from Project Due Date ✔

Due Dates Calculated from Project Start Date

Start Dates Calculated from Project Due Date

Start Dates Calculated from Project Start Date

For the remainder of this article, we'll be using **Calculate Due Dates from Project Due Date** to build out our date calculations, but the process will be similar for any other option.

For each work item in the project, we'll have these options:

| | START | DURATION | DUE | LEVEL OF EFFORT |
|----------------------|-------|----------|-----|-----------------|
| ▼ Concepting | | | | |
| ☑ Gather information | - | - | - | - |
| ☑ Brainstorm Design | - | - | - | - |

- **START:** The difference in days that your task should start. An offset of 1 when calculating start dates from the project start date would mean your task starts one day **after** the project start date.
- **DURATION:** The number of days each task should take. Duration is only required when calculating dates sequentially.
- **DUE:** The difference in days that your task should be due. An offset of -1 when calculating due dates from the project due date would mean your task is due one day **before** the project due date.
- **LEVEL OF EFFORT:** The expected level of effort needed for each task, which helps you manage your team's workload with [Scheduling](https://guide-ignite.inmotionnow.com/help/scheduling) (<https://guide-ignite.inmotionnow.com/help/scheduling>). This does not factor into the automatic date calculations, but is a helpful reference when setting work durations.

Since we're calculating our due dates based off the project due date, we're going to work backwards, starting from the final task. For our team, we want our "Send deliverable to requester" task to be due on the project due date, so we'll click next to the project due date line in our [Gantt View](https://guide-ignite.inmotionnow.com/help/gantt-view) (<https://guide-ignite.inmotionnow.com/help/gantt-view>), making this due 0 days prior to the due date. As we click into the remaining work items, our options on the left side will automatically update to reflect start, duration, and due dates.

| | START | DURATION | DUE | LEVEL OF EFFORT | PROJECT DUE DATE | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------|-------|----------|-----|-----------------|------------------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|----|----|----|----|----|----|----|---|---|---|---|
| | | | | | -18 | -17 | -16 | -15 | -14 | -13 | -12 | -11 | -10 | -9 | -8 | -7 | -6 | -5 | -4 | -3 | -2 | -1 | 0 | 1 | 2 | 3 |
| ☑ Gather information | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Brainstorm Design | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Pull branding material | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ▼ Design | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ 1st draft of copy due | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Get copy approved by team | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Proof for review | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Send deliverable to requester | - | - | - | - | | | | | | | | | | | | | | | | | | | | | | |

Due Dates Calculated from Project Due Date

Looking over the left side of our project planning view, we can edit the **DURATION**, **DUE**, and **LEVEL OF EFFORT** fields, but not **START**. This is because we've opted to calculate our due dates; if we'd chosen either of the two options to calculate start dates, that field would be editable and **DUE** would not be.

| | START | DURATION | DUE | LEVEL OF EFFORT | PROJECT DUE DATE | | | | | | | | | | | | | | | | | | | | | |
|---------------------------------|-------|----------|-----|-----------------|------------------|-----|-----|-----|-----|-----|-----|-----|-----|----|----|----|----|----|----|----|----|----|---|---|---|---|
| | | | | | -18 | -17 | -16 | -15 | -14 | -13 | -12 | -11 | -10 | -9 | -8 | -7 | -6 | -5 | -4 | -3 | -2 | -1 | 0 | 1 | 2 | 3 |
| ☑ Gather information | -8 | 1 day | -8 | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Brainstorm Design | -7 | 1 day | -7 | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Pull branding material | -6 | 1 day | -6 | - | | | | | | | | | | | | | | | | | | | | | | |
| ▼ Design | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ 1st draft of copy due | -5 | 2 days | -4 | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Get copy approved by team | -3 | 2 days | -2 | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Proof for review | -1 | 1 day | -1 | - | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Send deliverable to requester | 0 | 1 day | 0 | - | | | | | | | | | | | | | | | | | | | | | | |

Due Dates Calculated from Project Due Date

As these fields are manually updated, our Gantt View shifts accordingly.

Dependencies (<https://guide-ignite.inmotionnow.com/help/dependencies>) can also be configured from this view by clicking the circle next to our work item in the calendar view and dragging to the correlating work item.

| | START | DURATION | DUE | LEVEL OF EFFORT | PROJECT DUE DATE | | | | | | | | | | | | | | | | | | | | | | | | | |
|-----------------------------|-------|----------|-----|-----------------|------------------|-----|-----|-----|-----|-----|----|----|----|----|----|----|----|----|----|---|---|---|---|---|---|---|---|---|---|----|
| | | | | | -15 | -14 | -13 | -12 | -11 | -10 | -9 | -8 | -7 | -6 | -5 | -4 | -3 | -2 | -1 | 0 | 1 | 2 | 3 | 4 | 5 | 6 | 7 | 8 | 9 | 10 |
| ▼ Concepting | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Gather information | -8 | 1 day | -8 | 2 hours | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Brainstorm Design | -7 | 2 days | -6 | 3 hours | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Pull branding material | -6 | 1 day | -6 | 3 hours | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ▼ Design | | | | | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ 1st draft of copy due | -5 | 2 days | -4 | 5 hours | | | | | | | | | | | | | | | | | | | | | | | | | | |
| ☑ Get copy approved by team | -3 | 2 days | -2 | 2 hours | | | | | | | | | | | | | | | | | | | | | | | | | | |

Due Dates Calculated from Project Due Date

Calculated Project Duration: 9 days

This is how our automatic date calculations will look in action once we've published the project template and created a new project from it:

The screenshot displays a project management interface for a project titled "Sunflower Scent Ad". The interface is divided into two main sections: a task list on the left and a details panel on the right.

Task List:

- Concepting:**
 - ✓ Gather information (To Do, Nov 5 - Nov 5, 2h)
 - Brainstorm Design (To Do, Nov 6 - Nov 9, 3h)
 - Pull branding material (To Do, Nov 9 - Nov 9, 3h)
- Design:**
 - ✓ 1st draft of copy due (To Do, Nov 10 - Nov 11, 5h)
 - Get copy approved by team (To Do, Nov 12 - Nov 13, 2h)
 - ✓ Proof for review (To Do, Nov 16 - Nov 16)
 - ✓ Send deliverable to requester (To Do, Nov 17 - Nov 17)

Details Panel:

- DETAILS | FILES | MORE**
- Description:** Add description...
- Members:** +
- Start Date:** Nov 5
- Due Date:** Nov 17
- Add Tag:** [button]
- Level of Effort:** 15h
- Tracked Time:** 0h
- COMMENTS | ACTIVITY**
- Write a comment...** [input field]