



[Knowledgebase](#) > [How to guides](#) > [How to Set up Relative Dates and Offset Tasks](#)

How to Set up Relative Dates and Offset Tasks

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How to Create Relative and Timeline Offset Workflows

Timeline settings allow you to automate the scheduling of tasks within a workflow by anchoring them to a specific date. By using relative dates and offsets, you can ensure that all associated tasks in a matter automatically adjust their due dates whenever the central anchor date changes.

Link to Video Guide: <https://youtu.be/wEcC-JDzURU?si=yPUdZTvtzhgRh1Bc>

Prerequisites

- You must have **Admin** or **Workflow Manager** user permissions to access and edit workflow templates.

Understanding Workflow Anchors

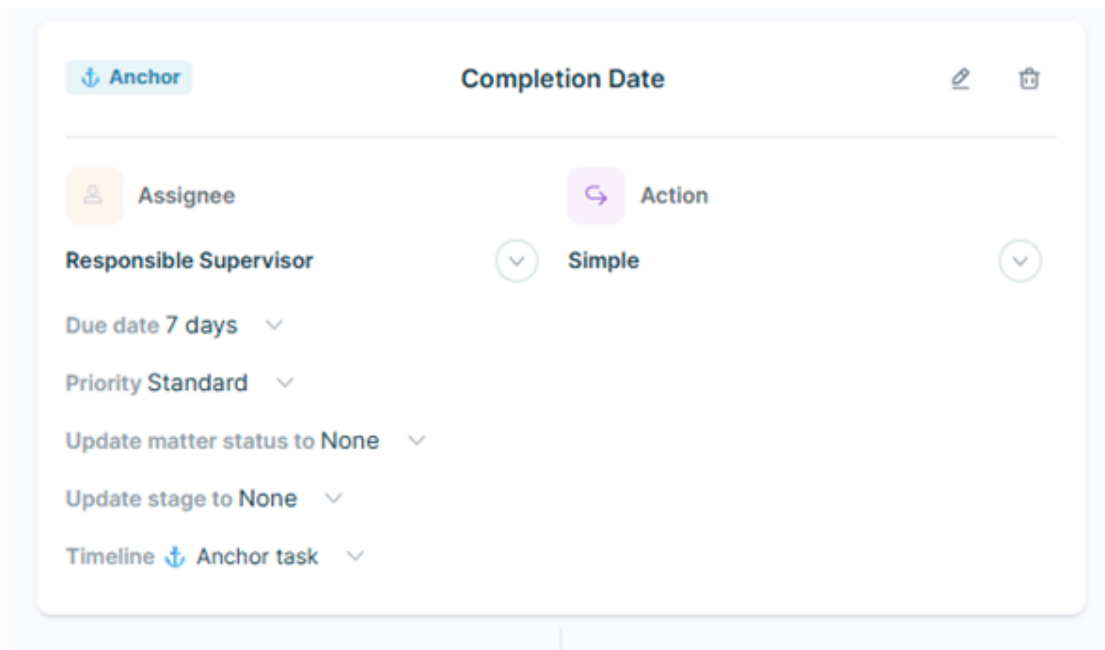
In Yao, a workflow is built around a single "Anchor Task". This task serves as the "Source of Truth" for the entire timeline.

- **Single Anchor Rule:** You can only have one anchor task per workflow.
- **Branching Workflows:** If your process requires multiple anchor dates (for example, both a "Start Date" and a "Court Hearing Date" which move independently), you should create additional separate workflows and branch them together.

Setting an Anchor Task

The anchor task is the fixed point which determines the dates for all other tasks in the sequence.

1. Navigate to the **Workflows** tab on the left-hand sidebar.
2. Select an existing workflow to edit or click **Add** to create a new one.
3. Open the task which you wish to set as the anchor by clicking the **Edit** (pencil) icon, or create a new task by clicking the + (plus) icon.
4. In the **New Task** or **Edit Task** modal, locate the **Timeline Settings** section at the bottom.
5. Tick the checkbox for **Anchor Task (Source of truth for this workflow)**. *The task will now display an anchor icon in the workflow builder.*
6. Click **Save**.



Configuring Relative Offset Tasks

Once an anchor is established, you can set other tasks to occur a specific number of days before or after that anchor.

1. Select the task which needs a relative date and open the edit modal.
2. In the **Timeline Settings** section, locate the **Offset days** field.
3. Enter the required offset:
 - To set a task **after** the anchor, enter a positive number (e.g., "10").
 - To set a task **before** the anchor, enter a negative number (e.g., "-10").
4. If the task should only be scheduled on workdays, tick the **Use business days only** checkbox.
5. Click **Save**. *The task will now display the offset value (e.g., +11 calendar days) in the workflow view.*

Using Timeline Offsets within a Matter

When a workflow with relative dates is applied to a matter, the system synchronises the entire schedule based on the anchor task's completion date.

1. Open the specific **Matter** and navigate to the **Tasks** tab.
2. Locate the task marked with the **Anchor** icon.
3. Click the **Calendar** icon next to the anchor task to adjust its date.
4. Select a new date from the calendar picker.
5. Observe the **Due** column for the other tasks in the workflow. *All tasks with offsets will automatically recalculate and update their due dates based on the new anchor date.*

Status	Priority	Due	Task Heading	Assigned To	Time	Author
10:00	STANDARD	10.05.26 -10 cal. days	Check in with Client Prior to Completion	Diddy Squater	0 min	Adam
10:00	STANDARD	20.05.26	Completion Date	Matt Fiske-Jack...	0 min	Adam
10:00	STANDARD	31.05.26 +11 cal. days	Send Buyer Completion Paperwork	Matt Fiske-Jack...	0 min	Adam