

# **Virto Charts Application for Microsoft Teams**

## **User and Installation Guide**

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# Virto Charts App for MS Teams

**The Virto Charts online application** is one more tool for data visualization by VirtoSoftware. The app helps Teams users to collect data from a SharePoint list into visual reports and graphs. With Virto Charts, users understand and estimate data efficiently and then make the right decision. The app creates charts automatically according to a chosen list and organizes them into a single dashboard in a separate Teams tab of a chosen channel. As a result, you build your own environment for competent analysis and get the actual information available for you and your team.

**Combine reports on a single dashboard.** Choose a SharePoint list to create automatically a set of graphs combined in a single dashboard. Add as many dashboards for various lists as you need to a SharePoint site page.

**Make the in-depth analysis of work using data of a single SharePoint list.** Virto Charts creates reports by status, member, completion chart, and a burndown chart. Choose a required parameter from the dropdown to fast-track the work of your team.

**Visualize data to make the right decisions.** Easily get the consolidated information you need to identify issues and find the best way to resolve them.

## System/Developer Requirements

### Operating System

SharePoint Online / Office 365

### Browser

Microsoft Internet Explorer 11 or higher, Google Chrome, Mozilla Firefox.

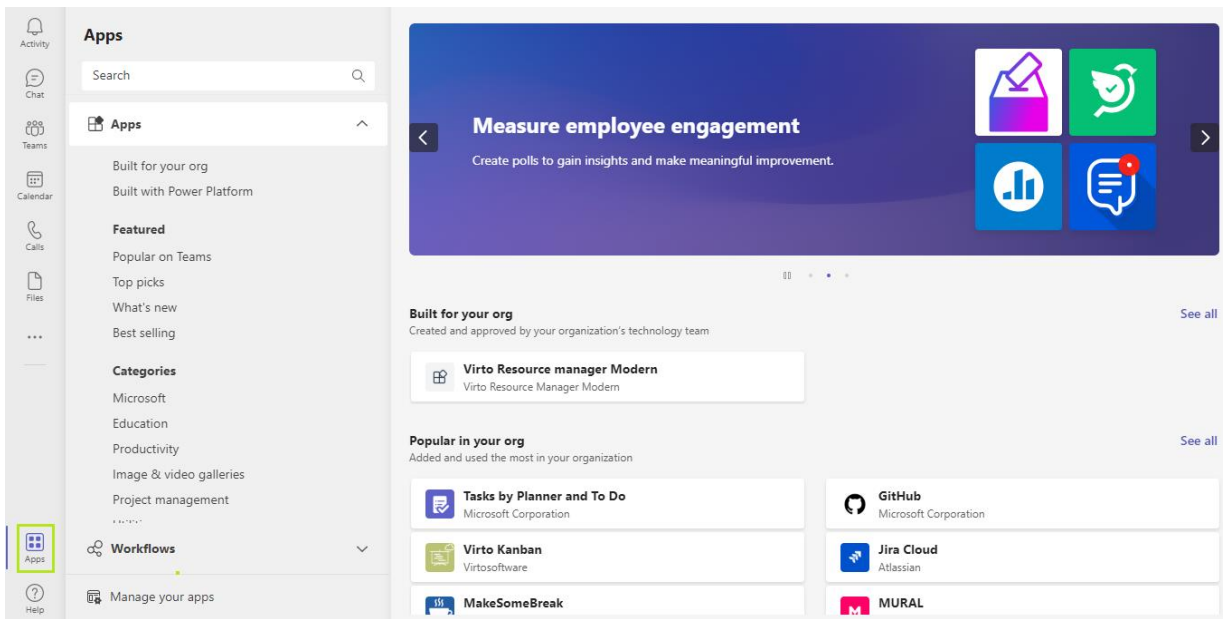
# Installation

This section describes how to install or contact Support for Virto Charts App.

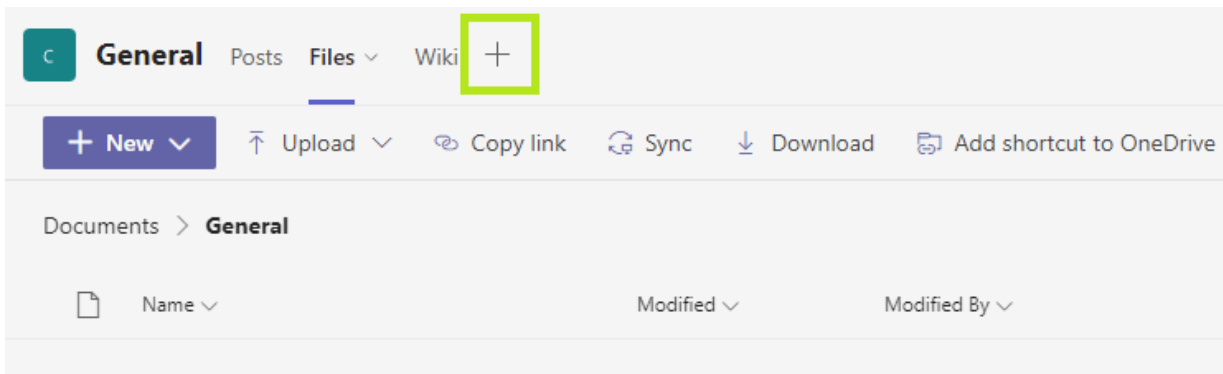
You can install and use Virto Charts App as a separate tab to a chosen Teams channel and use the full-featured app right in Teams.

**Note:** *Virto Charts App is free to install and use.*

1. Go to Apps in MS Teams and search for Virto Charts in the Apps. Click “Add to a team”. Follow the instructions of Teams to install the app.

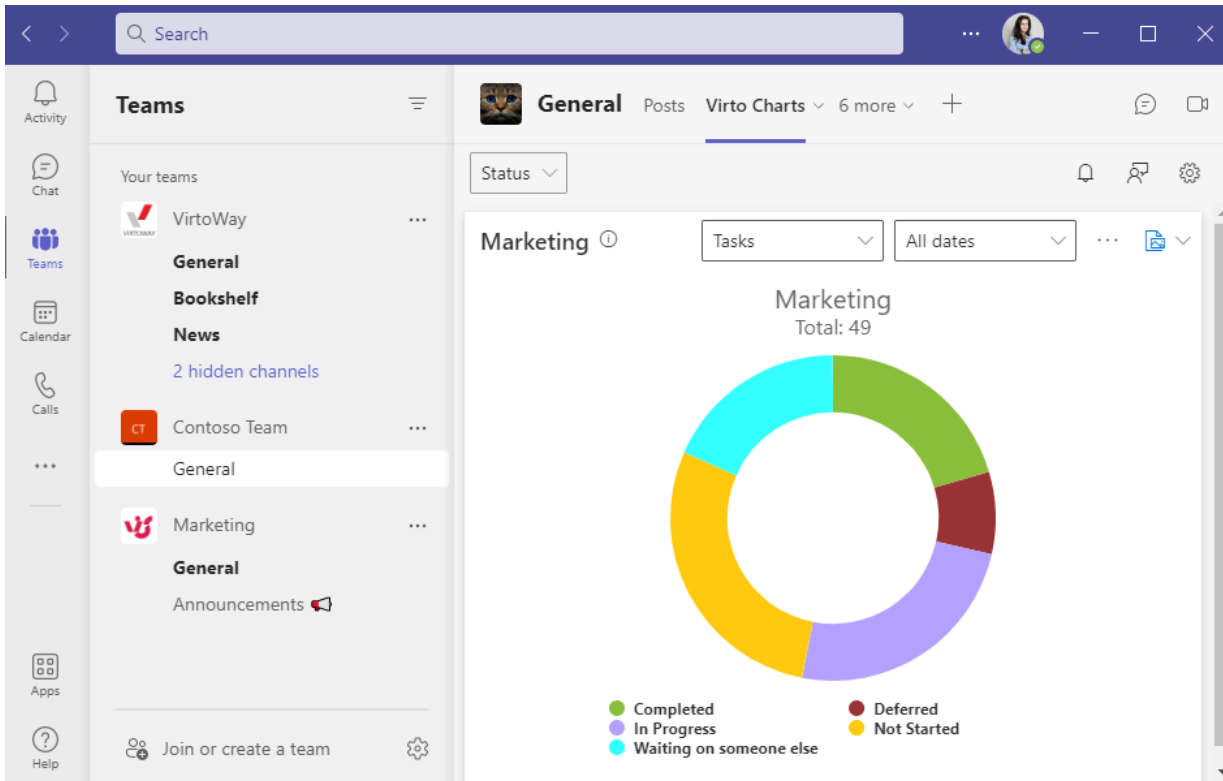


2. Go to your Teams and choose a channel where you'd like to add the Virto Charts. Click plus icon to add a new tab.



The Virto Charts App now is available as a separate tab of a chosen Teams channel.

Tune the app as described in below and use this feature-rich solution for your projects right in Teams.



If you need assistance installing Virto Charts app for Microsoft Teams, please contact [Virto Support Team](#).

## Virto Charts: Adjust and Use

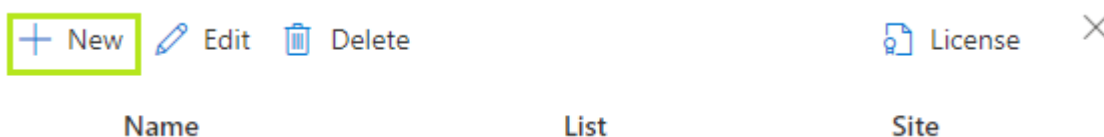
Virto Charts App allows you to build a complete dashboard with visual charts based on a chosen data in a single click. Read about all the built-in diagrams of the Virto Charts App and how to use them for your purposes.

### How to Add a New Chart

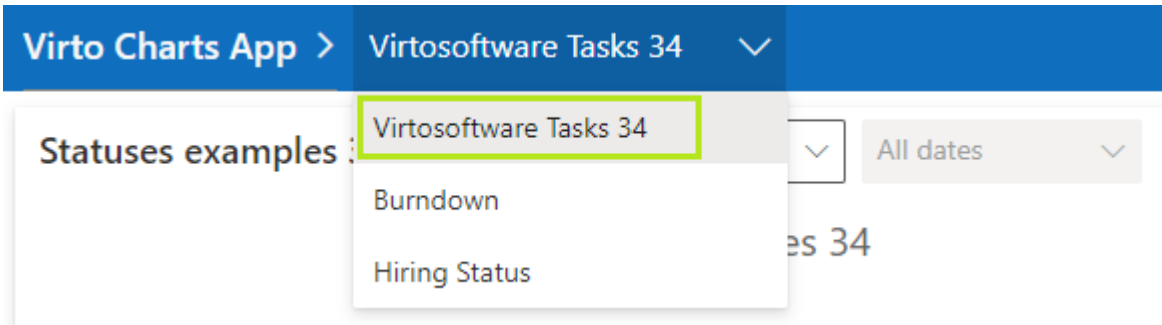
Go to the Charts settings under the gear icon in the top right-hand corner.



Click "New" to create a chart.



Specify the dashboard name (later you will choose between dashboards in the dropdown). Like here:



Tick the “Default” checkbox to let the new chart be first on the screen. Choose the site from the site collection and pick a source SharePoint list.

### Settings ×

**Name \***

Default

**Site url \***

**List \***

When you have picked a source list, the dropdown with available chart types appears. Choose the type you’d like to use and specify the name for the chart.

#### Chart settings

Task Status 🗑️

**Chart title \***

**Chart type \***

- Status
- Members
- Completion
- Burndown by tasks
- Lead time

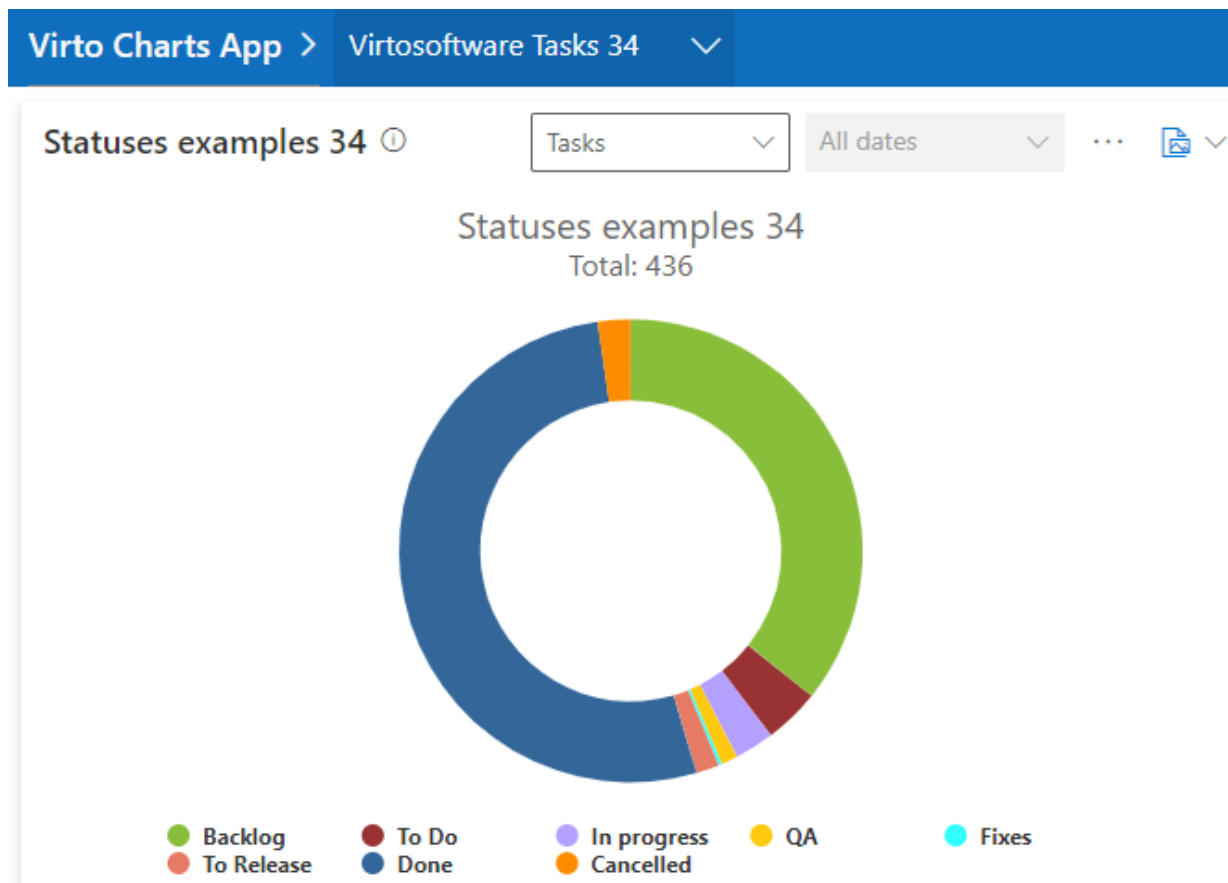
There are five chart types available for making reports, we will describe each of them later:

- Status;
- Members;
- Completion;
- Burndown by tasks;
- Lead time.

Define the field to display for the chosen chart type. For example, you can choose “Priority”, “Task status”, “Labels”, “Project” or “Goal” for a Status chart type. For some chart types you also may need to choose additional fields:

- 1) User field – for Members chart type.
- 2) Due date field – for Completion chart type.

Remember to save the chart.



Below we describe all the chart types in details.

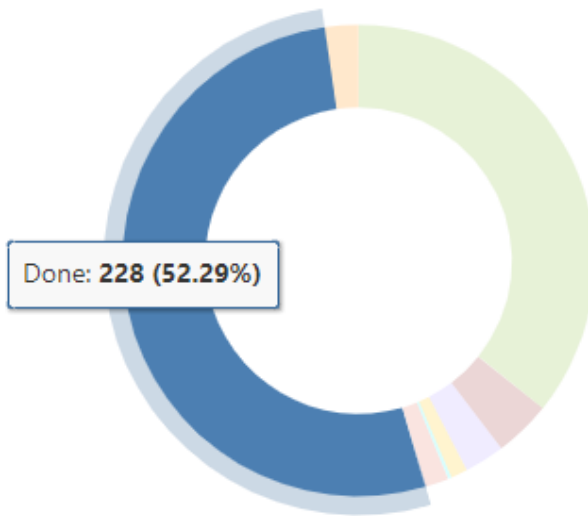
## Status

The status chart displays data depending on its completion status.

### Statuses examples 34 ⓘ

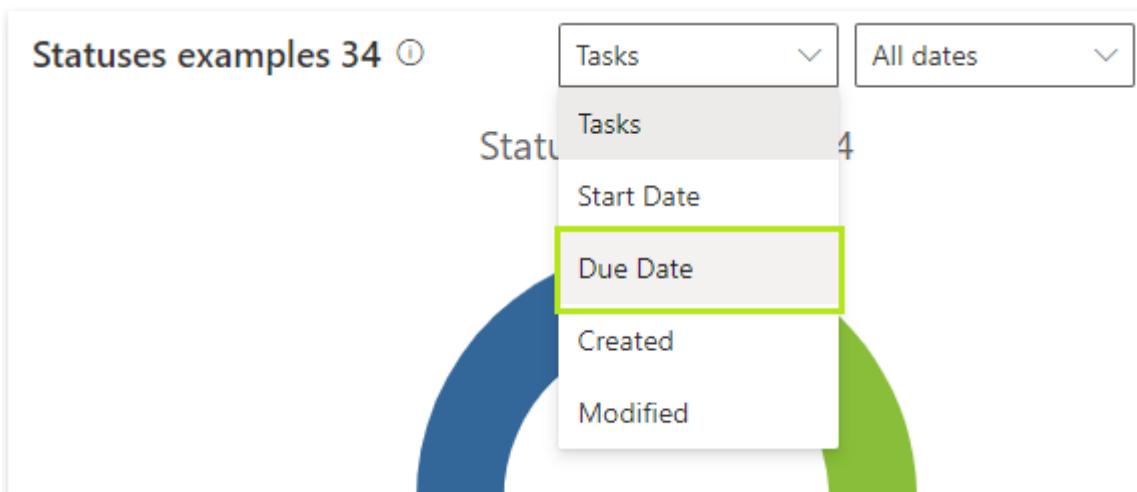


Statuses examples 34  
Total: 436



- Backlog
- To Do
- In progress
- QA
- Fixes
- To Release
- Done
- Cancelled

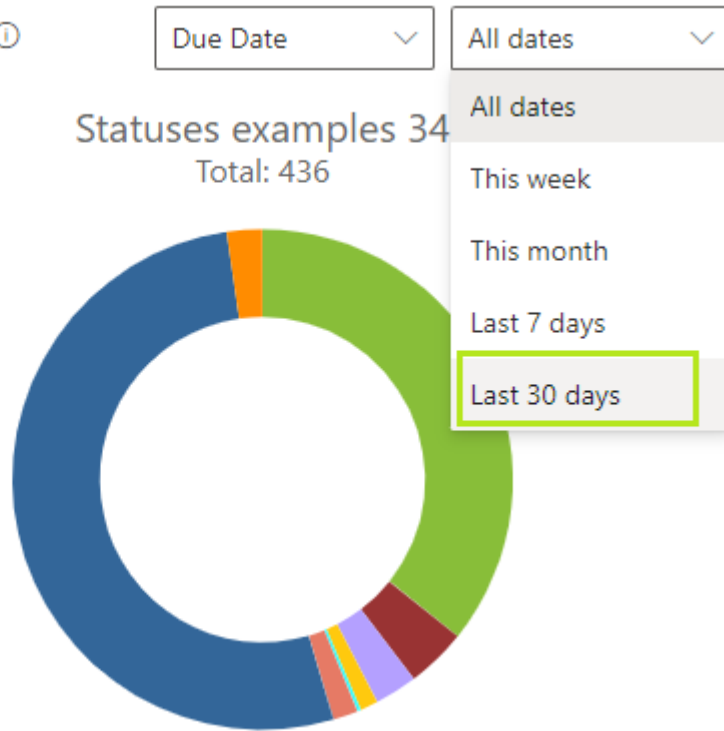
You can display all the tasks from the chosen list or play with filters. For instance, if you need to show only the tasks with the last 30 days due date, choose "Due date" first.



And then pick the period "Last 30 days" in the Dates field.



## Statuses examples 34 ⓘ



With this chart, you also can track the budget. Just make sure you have the appropriate field in the list.

## Members

The same idea works with the second chart – **Members**. On this chart you also can see the tasks with chosen fields grouped by assignee. In the chart settings choose the field. For example, if you choose priority, the tasks will be displayed according to their priorities and people they are assigned to.

Priority

Task Status

Labels

Project

Goal

Priority ▼

**User Field \***

Assigned To ▼

Besides assignee, you can choose users from “Created by” or “Modified by” field. As you wish.

Chart type \*

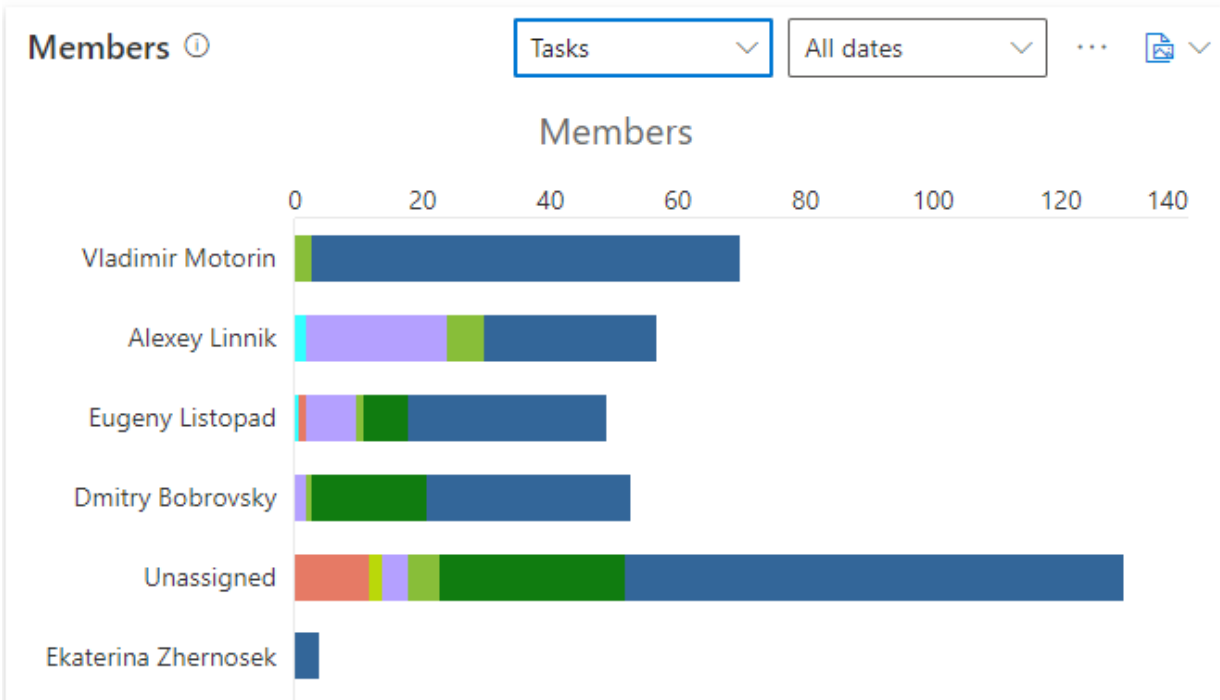
Members

Assigned To

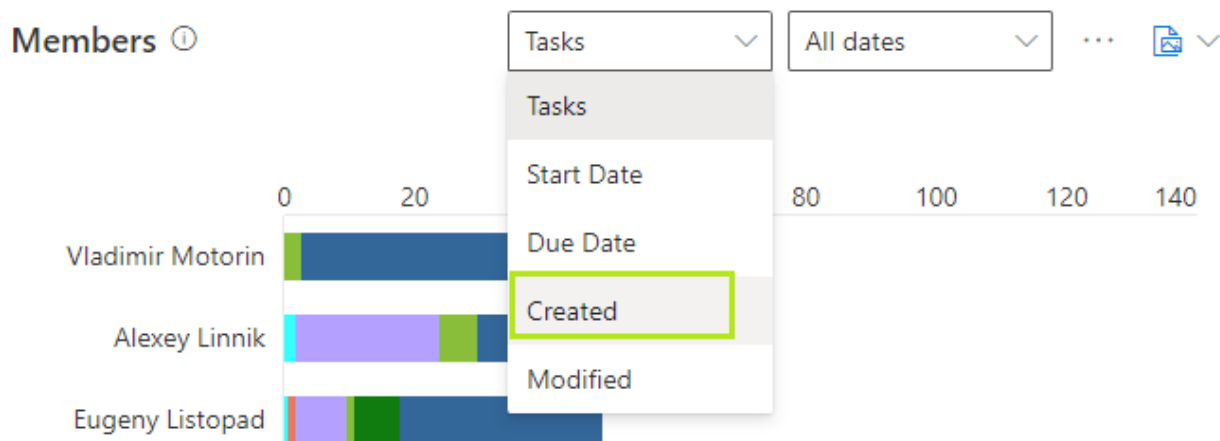
Created By

Modified By

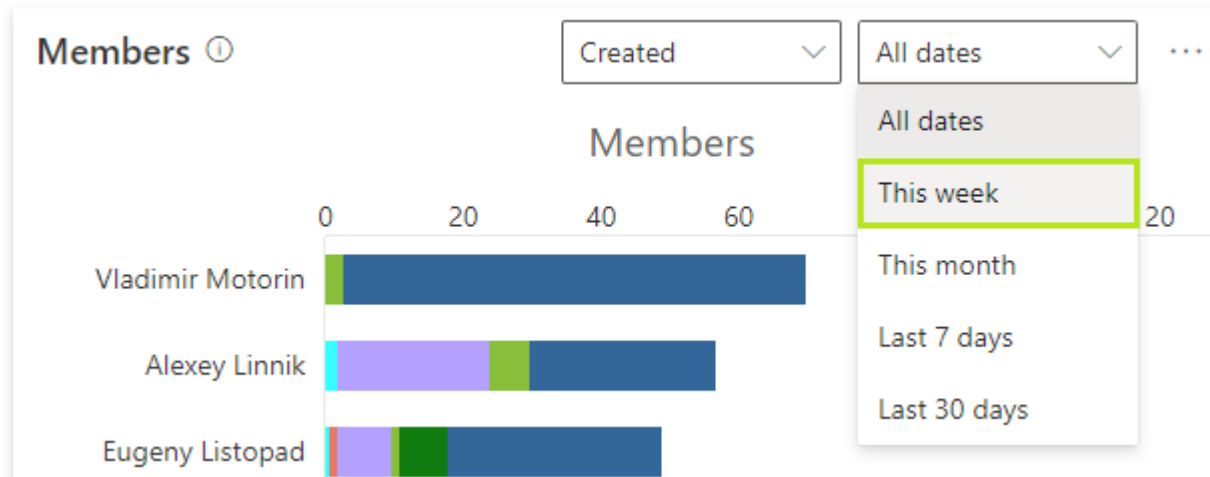
Assigned To



In the Members chart you can also display all tasks grouped by assignee or apply filters. For example, you can show tasks **created** within a chosen **period**. In this case, choose “Created” field.



And then define the period.



## Completion

Use this chart to see the tasks completed in-time and overdue. In the Completion chart settings, you should choose the field to display – Priority, Task Status, Labels, Project, or Goal.

### Chart settings

Priority

Task Status

Labels

Project

Goal

Task Status ▾

Due date field \*

Due Date ▾

For this chart type you also should pick a due date field – Start Date, Due Date, Modified or Created.

**Due date field \***

- Due Date
- Start Date
- Due Date
- Modified
- Created

Marketing Campaigns

Marketing Campaigns  
Total: 35



Play with filters and choose the parameters from the dropdown.

Marketing Campaigns

- Tasks
- Start Date
- Due Date
- Modified
- Created

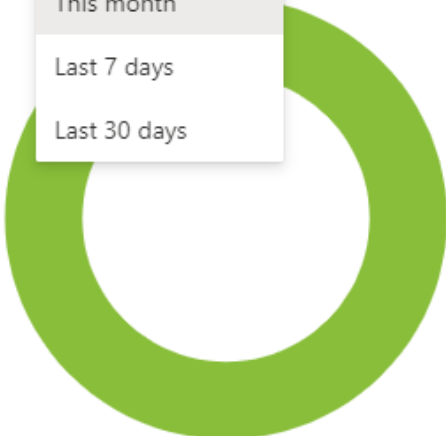
Marketing Campaigns  
Total: 2



You also can pick a period.

Marketing Campaigns ⓘ Due Date ▾ This month ▾ 6/1/2022 – 6/30/2022 📅


- All dates
- This week
- This month**
- Last 7 days
- Last 30 days



And filter the data by chosen field to display. For example, status field.

This month ▾ 6/1/2022 – 6/30/2022 📅 Completed, Deferred, W... ▾

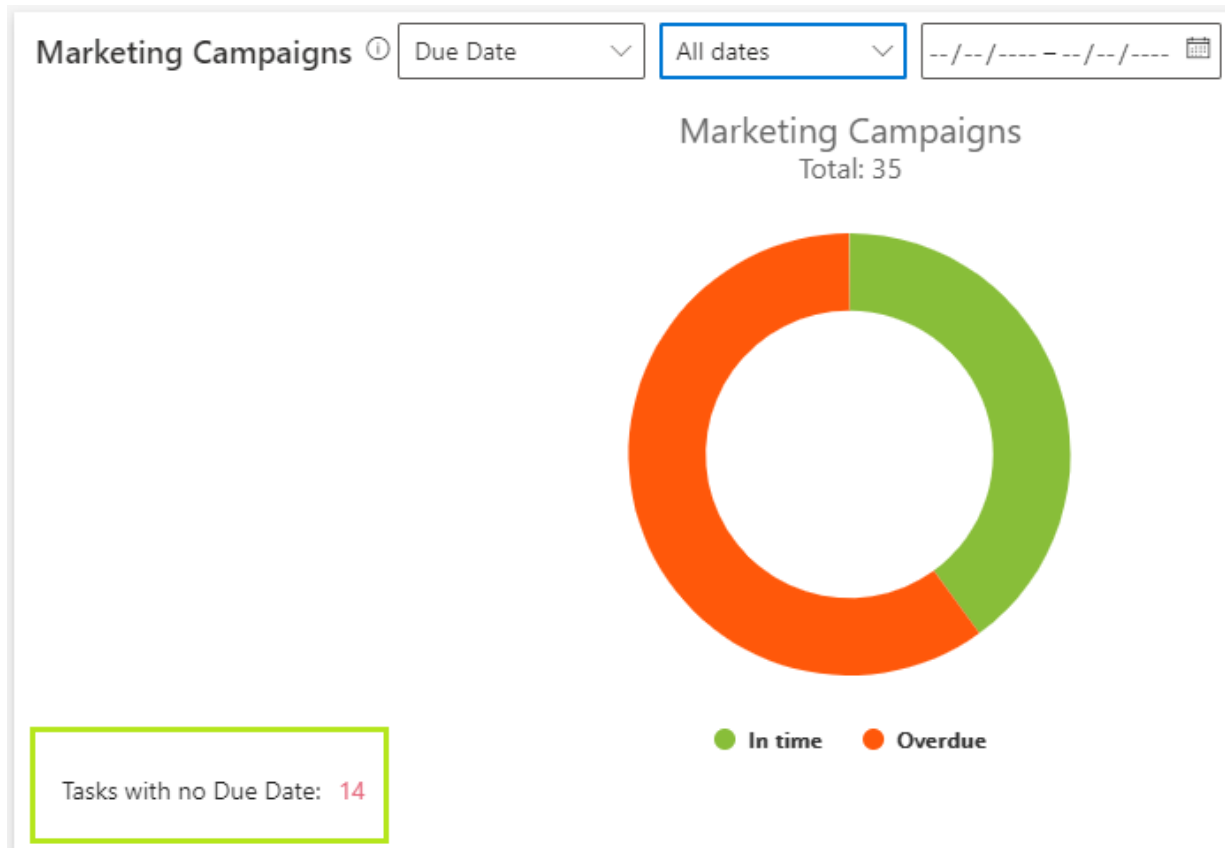
Marketing Campaigns  
Total: 1



- Completed
- Deferred
- In Progress
- Not Started
- Waiting on someone else

**Note:** please, do not forget that this chart shows only the tasks with a set due date.

If there are tasks with no due date defined, you will see the notification. You can go to the source list and add due date to show these tasks on the chart.



## Burndown

The Burndown chart shows the tasks left to do. In the chart settings define the field to display – Priority, Task Status, Labels or Project.

Field to display \*

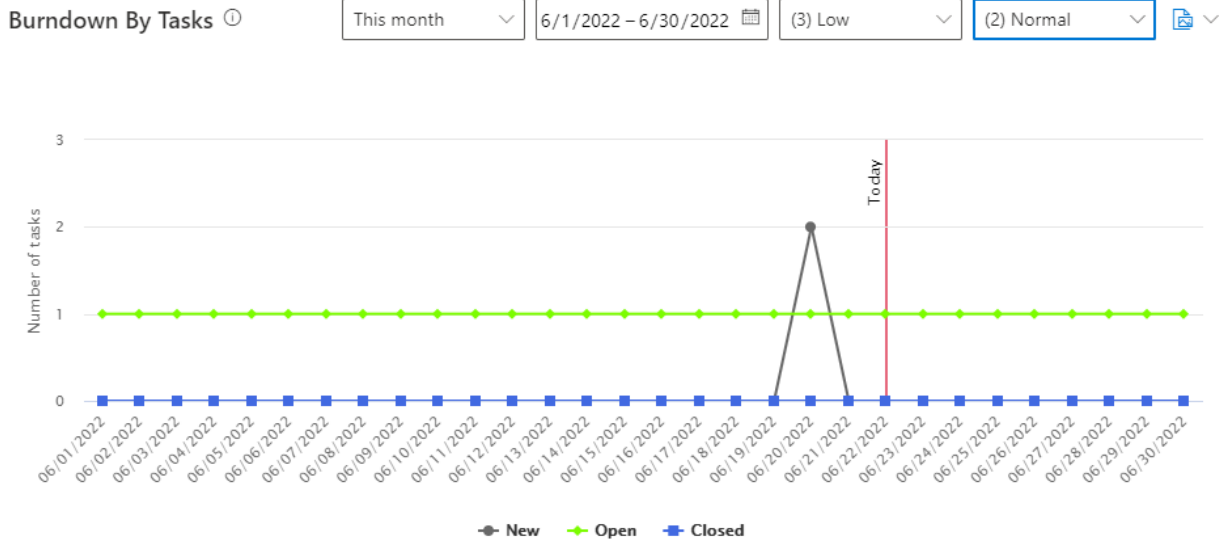
Task Status ▼

Priority

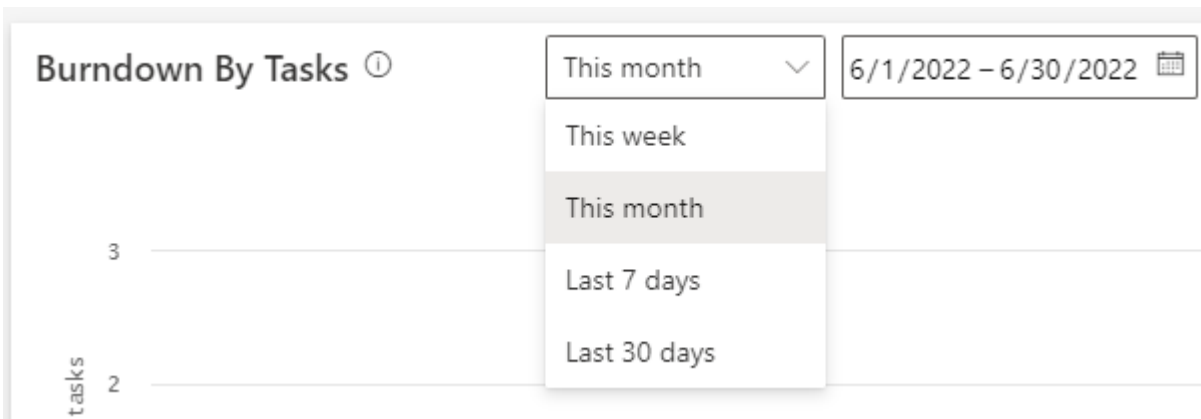
Task Status

Labels

Project



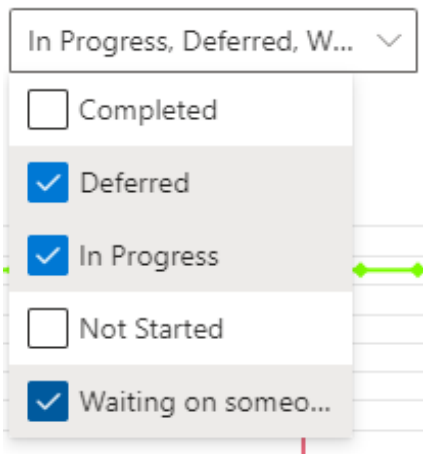
For the Burndown chart choose the period.



One more thing to consider for Burndown chart is that you need to specify fields “Display as Open” and “Display as Done”.



For example, you would like to consider in progress, deferred and waiting on someone else tasks as **open tasks**.

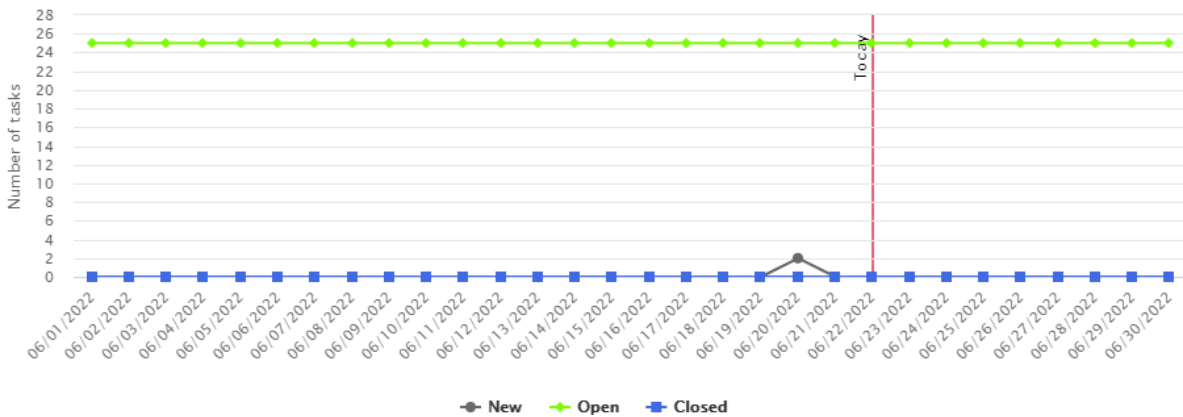


Now define the tasks to consider as completed tasks.

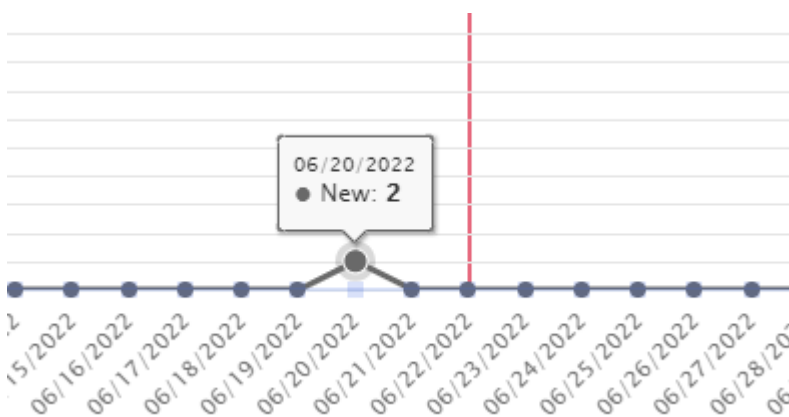
Completed ▾

- Completed
- Deferred
- In Progress
- Not Started
- Waiting on so...

Burndown By Tasks ⓘ This month ▾ 6/1/2022 – 6/30/2022 📅 In Progress, Deferred, W... ▾ Completed ▾ 📄 ▾



This way you can indicate the “healthy project” and well-functioning team.

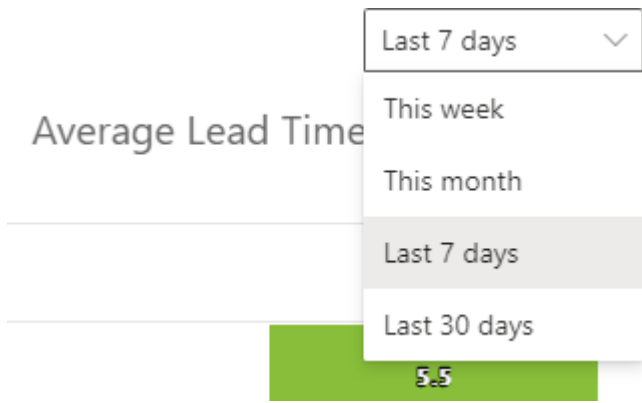


### Lead Time

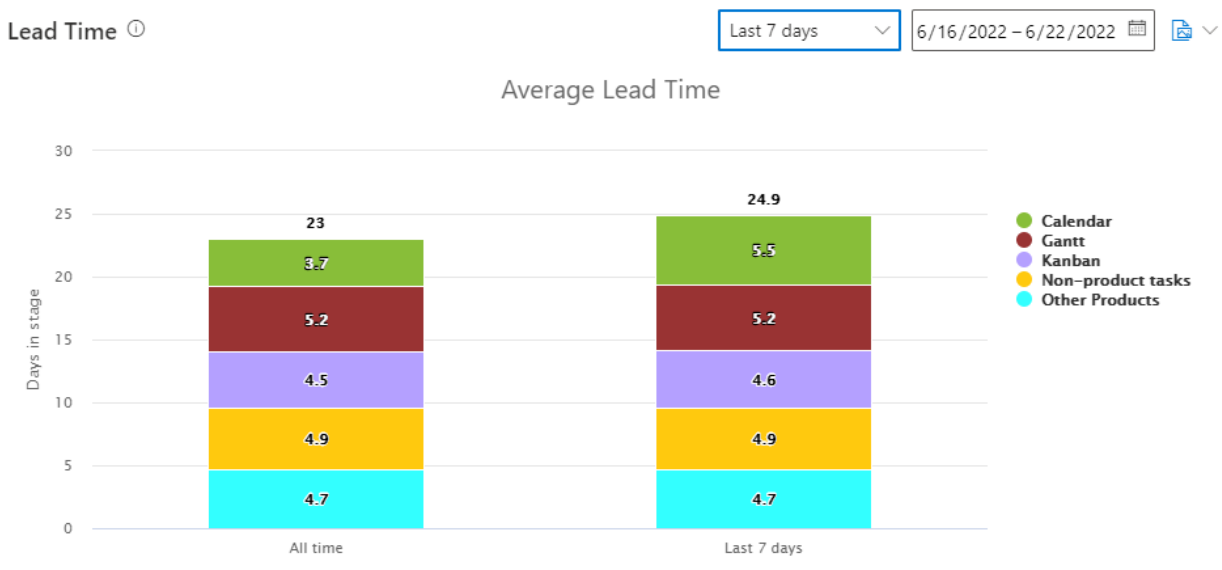
The Lead Time chart shows the amount of time that passed between when a task is created and when it's completed. On this chart you can compare the values for the last month and for the whole period.

For this chart, choose the fields to display (see the legend).





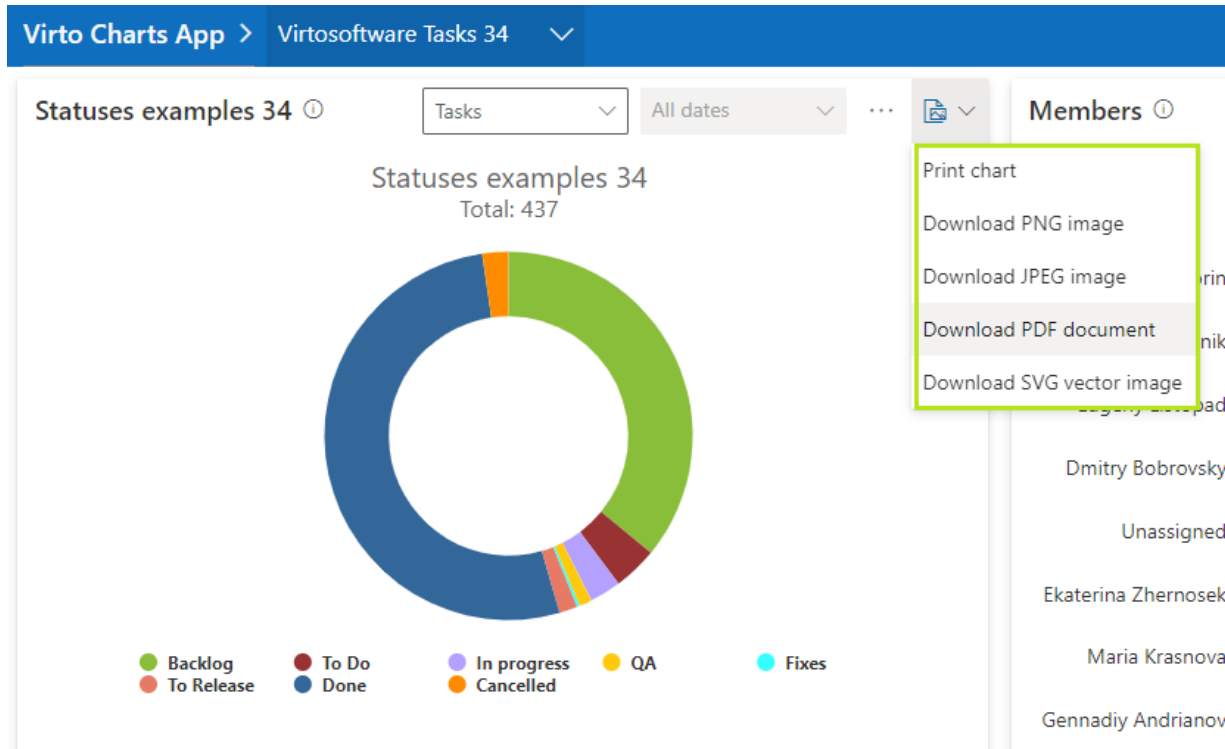
For example, on this screenshot the tasks are grouped by Product and you can see time spent for tasks for the whole period and for the last 7 days.



The Lead Time chart is especially appropriate for tracking tickets of a support team or analyze the Telesales work.

### Print chart

You can print all the charts or save any of them as an image or PDF file. The following formats are supported: PNG, SVG, JPEG. Click the menu on the left and choose the required format to save the graph.



## Contact Support

If you have any questions related to Virto Charts app for Microsoft Teams and haven't found the answer in the manual, please contact [Virto Support Team](#).