



Virto SharePoint Gantt Chart App for Office 365 Release 1.0.3

User and Installation Guide

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Overview

Virto Gantt Chart App for SharePoint Online / SharePoint 2013 is intended to view SharePoint list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time in Microsoft SharePoint 2013.

Features List

Feature	Version
View list items in a Gantt chart	v.1.0
Using SharePoint list as a data source	v.1.0
Display several lists in one Gantt chart	v. 1.0
Creating new tasks/milestones right in the Gantt chart	v.1.0
Applying different timescales to view items	v.1.0
Scrolling Gantt chart to required period of time	v.1.0
Scrolling to current day tasks	v.1.0
Creating child tasks for selected tasks	v.1.0
Changing task duration with drag and drop	v.1.0
Adding task resources.	v.1.0
Changing percent complete with drag and drop	v.1.0
Ability to define read-only settings	v.1.0
Ability to define colors for tasks/summary tasks/milestones/percent complete.	v.1.0
Ability to define background color of data source rows.	v.1.0.0.1
Dependencies arrows drag-and-drop and delete.	v.1.0.0.1

System/Developer Requirements

Operating System

Microsoft Windows Server 2012, SharePoint 2013, SharePoint Online / Office 365

Server

SharePoint Release 2013:
 Microsoft Office SharePoint Server 2013;
 - Microsoft .NET Framework 4.5;

Browser

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

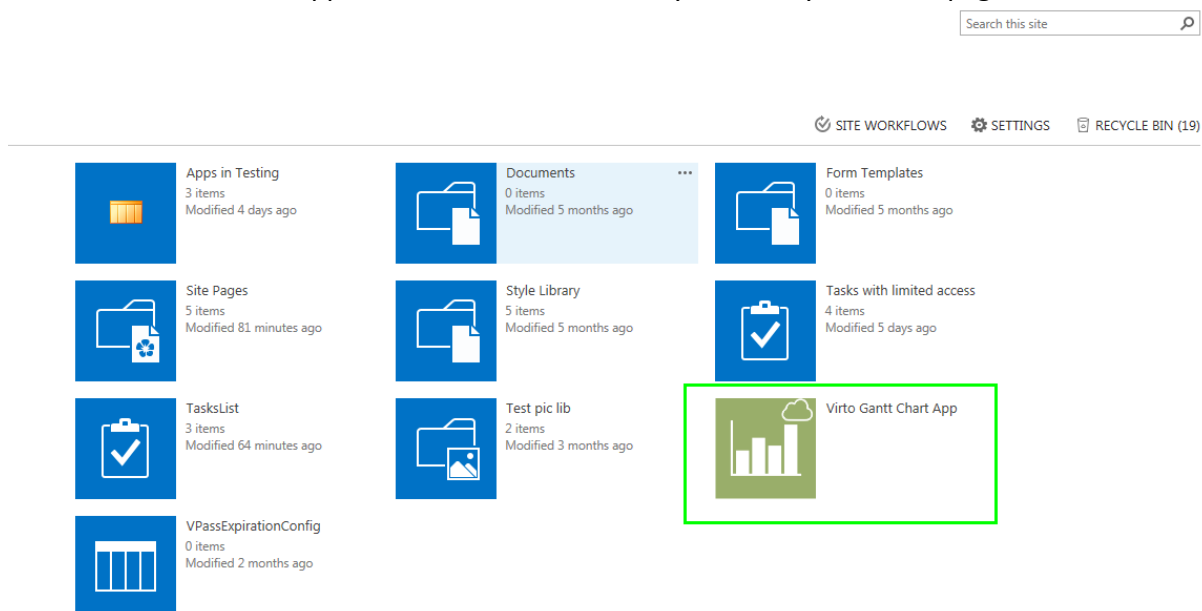
Virto Gantt Chart App for Office 365.

Product description

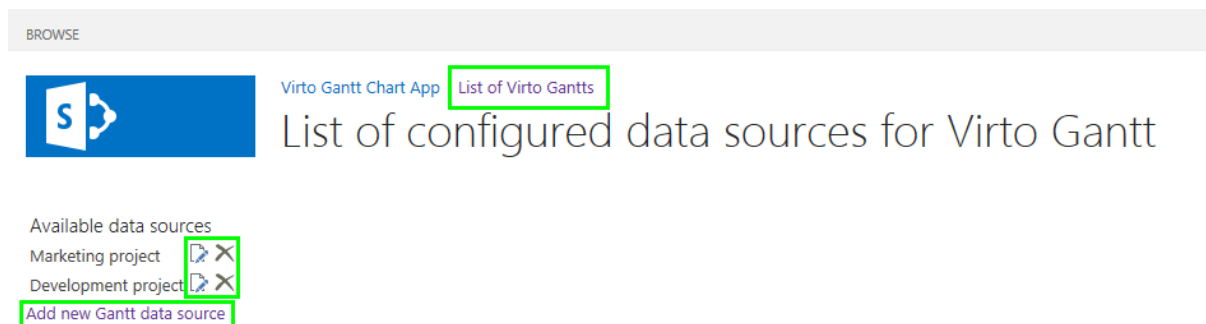
Virto Gantt Chart App for SharePoint 2013 / SharePoint Online is designed for displaying and managing SharePoint tasks in Gantt view. Virto Gantt Chart App is highly customizable solution, which includes the following features: displaying several task lists in one view; different (day, week, month, year) time scales; customizable task/milestone color; read only mode; filtering tasks by using list views; displaying several list columns in the left part of the app; editing tasks directly from the app (adding/moving/deleting/resizing); adding child tasks.

Virto Gantt Chart App Installation

When Virto Gantt Chart App is installed, it is automatically added to your site on page Site Contents



To adjust Gantt view for SharePoint list, you need to define data source settings first of all. Click on Virto Gantt Chart App icon and open configuration page for data sources.



Configuration of data sources

Data sources configuration page displays list of already configured data sources. This page also contains link for adding new data source and link for configuring Ganttts.

Click on link “Add new Gantt data source” and you will be redirected to the page for new data source customization.

Dev
Dev subsite
 EDIT LINKS

Adding new data source

Data source name: *

Type site url: *

Select list: *

Select displayed view:

Task title field name: *

Start date field name: *

End date field name: *

Percent complete field name:

Resource field name:

Predecessor field name:

Select fields for left part (table) of Gantt view: *

Background color for data source rows in the left Gantt part:

Task color:

Progress bar color:

Milestone color:

Summary task color:

Summary task progress bar color:

Required fields for data source are marked with “*” symbol.

Fill fields with data source name and site url, then press “Refresh” button. If you press “Refresh” button without filling site url field current site url will be inserted. Click this button every time when you need to change site url.

Select list with tasks, which should be displayed in Virto Gantt Chart App for SharePoint 2013 / SharePoint Online. Any type of list can be used.

If you want to display tasks in specific list view, select the view.

Select field that will be displayed as task title, usually is used "Task Name".

Select fields those contain task start and end dates.

If list contains field with task percent complete select the field accordingly.

Select field with task resources (user or several users who are assigned to the task, usually "Assigned To").

Select field with task predecessor(s). Predecessors and successors are connected through arrow in Gantt chart.

You have to select at least one field that will be displayed in the left (table) part of the Gantt view. Usually it is field with the task name.

Select colors for task, progress bar, data source row, milestone, summary task, and summary task progress bar. If custom colors are not selected default ones will be applied.

Configured data source will look like this example:

Dev Dev subsite EDIT LINKS

Editing data source "Marketing"

Data source name: * Marketing

Type site url: * <http://mc07sp2013/sites/dev> Refresh

Select list: * TasksList

Select displayed view: [Not selected]

Task title field name: * Task Name

Start date field name: * Start Date

End date field name: * Due Date

Percent complete field name: % Complete

Resource field name: Assigned To

Predecessor field name: Predecessors

Select fields for left part (table) of Gantt view: * Task Name Add table field

Background color for data source rows in the left Gantt part: #c6d9f0

Task color:

Progress bar color:

Milestone color:

Summary task color:

Summary task progress bar color:


Save Cancel

Press "Save" button after filling all desired and required fields.

Configuration of Gantt Chart view

Click “List of Virto SharePoint Gantts” link when you have configured desired data sources. Page with available Gantts will be opened. The page has links for navigating to data sources list, for editing/deleting configured Gantt and for adding new Gantt.



BROWSE



Virto Gantt Chart App [List of data sources for Virto Gantt](#)

Available Virto Gantts

Available Virto Gantts

Marketing + Development  

[Add new Gantt](#)

Click “Add new Gantt” for adding new Gantt view. Gantt adding page looks like this.

Adding new Gantt settings

Gantt name: *	<input type="text"/>
List of data sources: *	<input type="text"/> Add new source
Width (in pixels):	<input type="text"/>
Height (in pixels):	<input type="text"/>
Splitter position (in %):	<input type="text"/>
Default timescale:	Days ▼
Show weekends:	<input type="checkbox"/>
Show current time marker:	<input type="checkbox"/>
Display tasks from* <input type="text" value="7"/> day(s) before and till* <input type="text" value="7"/> day(s) after selected date in day scale.	
Display tasks from* <input type="text" value="2"/> week(s) before and till* <input type="text" value="2"/> week(s) after selected date in week scale.	
Display tasks from* <input type="text" value="1"/> month(s) before and till* <input type="text" value="1"/> month(s) after selected date in month scale.	
Display tasks from* <input type="text" value="0"/> year(s) before and till* <input type="text" value="0"/> year(s) after selected date in year scale.	
Default new task duration (minutes): *	<input type="text" value="60"/>
Date format (example - MM/dd/yyyy hh:mm tt):	<input type="text"/>
	<input type="button" value="Save"/> <input type="button" value="Cancel"/>

Required fields are marked with “*” symbol.

Fill in Gantt name. Then press button “Add new source” for adding at least one data source to Gantt.

Each data source has its own options. You can uncheck box “Show in Virto SharePoint Gantt” and make data source not available for displaying (save without publishing). Also you can set data source on read only, i.e. user will not be able to create/modify tasks in Gantt Chart App for the data source.

Press “Save” button to apply adjusted options to the data source and continue adjustment.

Adding new Gantt settings

Gantt name: *

List of data sources: *

Select data source: Marketing ▼

Show in Virto Gantt:

Read only:

Save Cancel

Width (in pixels):

Height (in pixels):

Splitter position (in %):

Default timescale: Days ▼

Show weekends:

Show current time marker:

Display tasks from* 7 day(s) before and till* 7 day(s) after selected date in day scale.

Display tasks from* 2 week(s) before and till* 2 week(s) after selected date in week scale.

Display tasks from* 1 month(s) before and till* 1 month(s) after selected date in month scale.

Display tasks from* 0 year(s) before and till* 0 year(s) after selected date in year scale.

Default new task duration (minutes): * 60

Date format (example - MM/dd/yyyy hh:mm tt):

Save Cancel

Set width and/or height in pixels if you want to limit size of Virto Gantt Chart App displayed on site. Default height value is 800px, default width proportion is 100%.

Set splitter position in percent (without “%” symbol). Splitter separates left Gantt table part from right graphical part.

Choose default time scale (available values are days, weeks, months and year).

Check option “Show weekend” if you want to display weekends in Gantt Chart App. Weekends are hidden by default.

Check option “Show current time marker” if you want to see current time (as red vertical line) in Gantt Chart App.

Set time range for displayed tasks.

Default new task duration is 60 minutes. You can also define new default task duration.

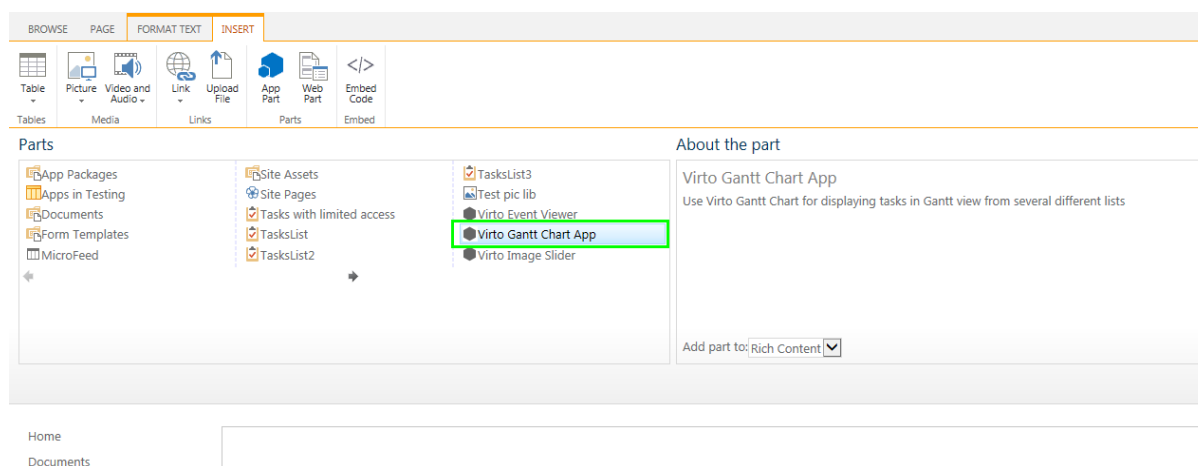
You can also predefine standard values for a Date format displaying. Date and Time will be displayed in left (table) part of the Gantt.

Then press “Save” button and apply changes.

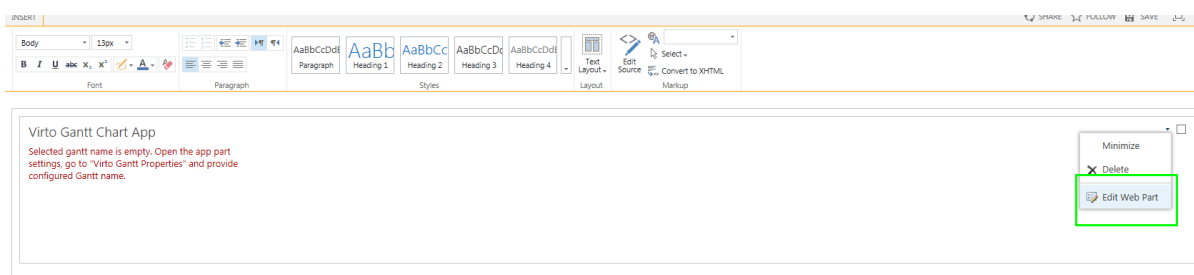
Using Virto Gantt Chart App

Installation Virto Gantt Chart App on SharePoint page.

Open SharePoint page on site where you deployed Virto Gantt Chart App. Press “Edit” button on the toolbar. Switch to “Insert” toolbar tab, click “App part” button and select Virto Gantt Chart App, then press “Add” button.



You will see standard warning that Virto Gantt Chart App is not configured. Open the app part menu and click “Edit Web Part” menu item.



Go to “Virto Gantt Chart App Properties” section and type there name of previously configured Gantt.

The image shows a dialog box titled "Virto Gantt Chart App" with a close button (X) in the top right corner. The dialog is divided into several sections:

- Appearance** (expanded):
 - Title**: A text input field containing "Virto Gantt Chart App".
 - Height**: A section asking "Should the Web Part have a fixed height?". It has two radio buttons: "Yes" (unselected) and "No. Adjust height to fit zone." (selected). The "Yes" option is followed by a text input field and a "Pixels" dropdown menu.
 - Width**: A section asking "Should the Web Part have a fixed width?". It has two radio buttons: "Yes" (unselected) and "No. Adjust width to fit zone." (selected). The "Yes" option is followed by a text input field and a "Pixels" dropdown menu.
 - Chrome State**: Two radio buttons: "Minimized" (unselected) and "Normal" (selected).
 - Chrome Type**: A dropdown menu set to "Default".
- Layout** (collapsed, indicated by a plus sign).
- Advanced** (collapsed, indicated by a plus sign).
- Virto Gantt Chart Properties** (expanded and highlighted with a green border):
 - A text input field labeled "Type Gantt name here".

At the bottom of the dialog are three buttons: "OK", "Cancel", and "Apply".

Press “OK” or “Apply” button. Press “Save” button on page toolbar to apply adjustments.

Layout of Virto Gantt Chart App

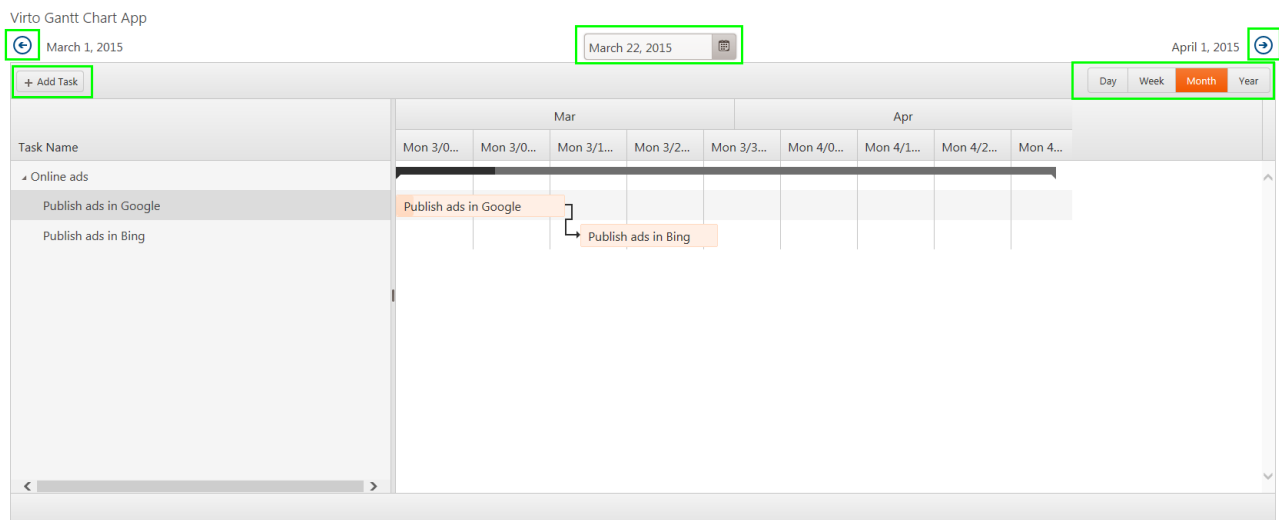
Virto Gantt Chart App consists of header and Gantt chart.

Left part includes list of tasks and the right part shows graphical structure: duration and relations of tasks. When you scroll tasks in the left part, the right part is scrolled accordingly.

Header contains navigation buttons and date picker with currently selected date for quick navigation. Use navigation arrow buttons to go to required month. Or select in the date picker a date to navigate to.

Header of Gantt Chart App has buttons for new task adding and for time scale changing.

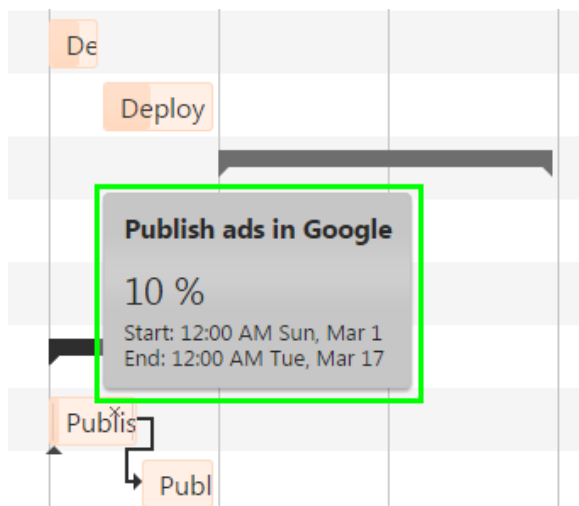
When the Gantt Chart App for SharePoint Online / SharePoint 2013 is adjusted, it looks like as follows:



Working with tasks in Virto Gantt Chart App

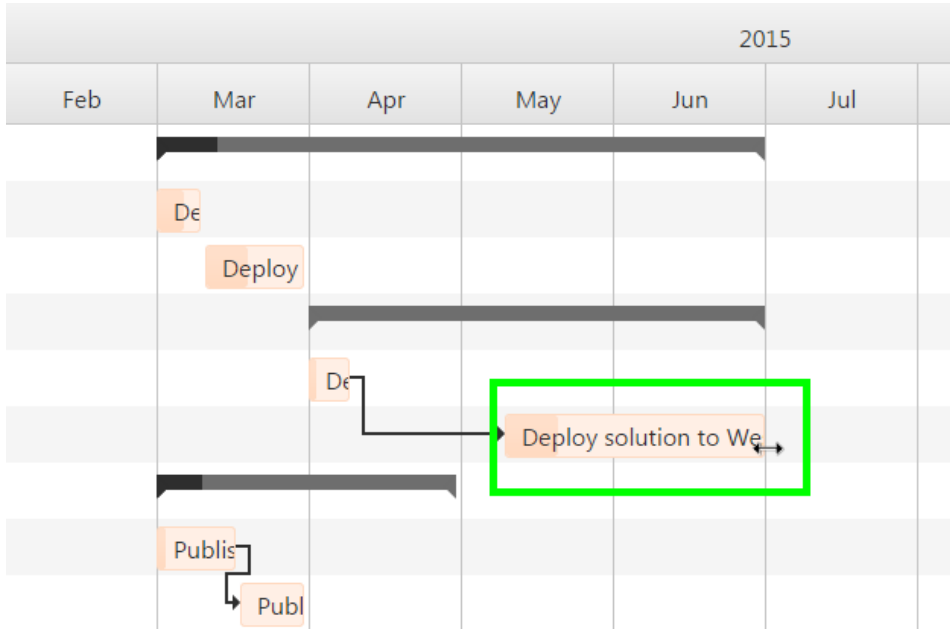
You can add/delete/move/resize tasks in Virto Gantt Chart App View.

Hover mouse pointer over some task and tooltip with brief task information will appear.



Moving Tasks and changing Task Duration

You can easily change task dates by simple moving. Use your mouse to move tasks to other dates by simple drag and drop. Task resizing (changing start or end date) is also supported as well. Just drag start or end of a task to required date and drop it. The same changes will be done in SharePoint list.



Editing a task

If you need to edit a task, just double click on task and editing/viewing (if data source is read only) form will be displayed. If data source is not read only the task can be also deleted by clicking "Delete" button on editing form.

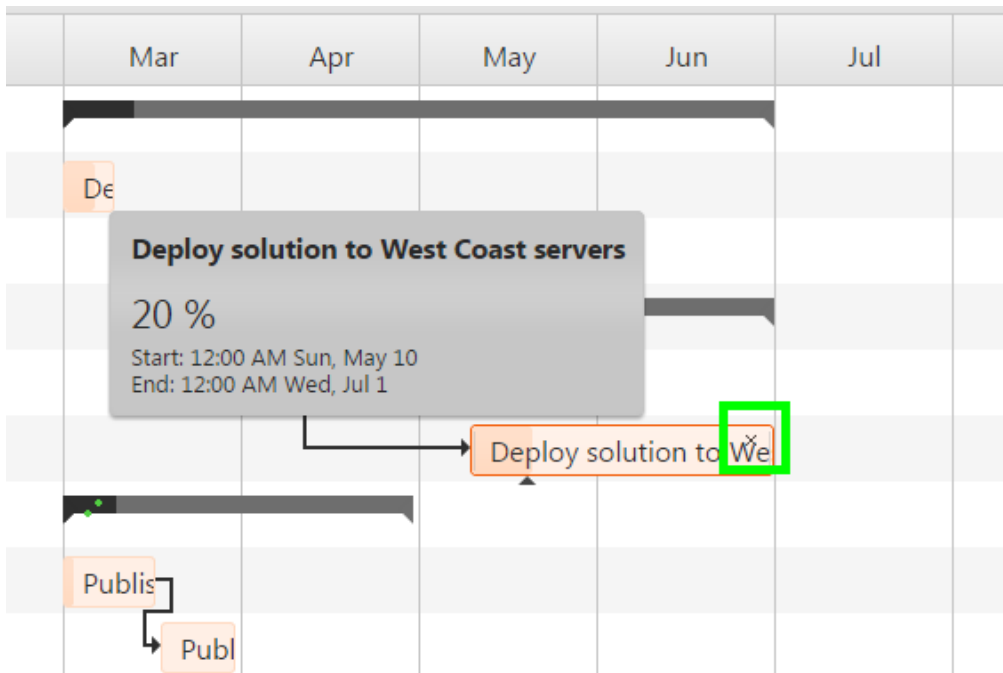
The screenshot shows an "Edit task" dialog box overlaid on a Gantt chart. The dialog box contains the following fields and values:

- Task name: Deploy solution to Farn
- Start date: 3/11/2015 12:00 AM
- End date: 3/30/2015 11:00 PM
- Percent complete: 42 %
- Resources: Nick Brook x

At the bottom of the dialog box, there are three buttons: "Delete", "Save", and "Cancel".

Deleting a task

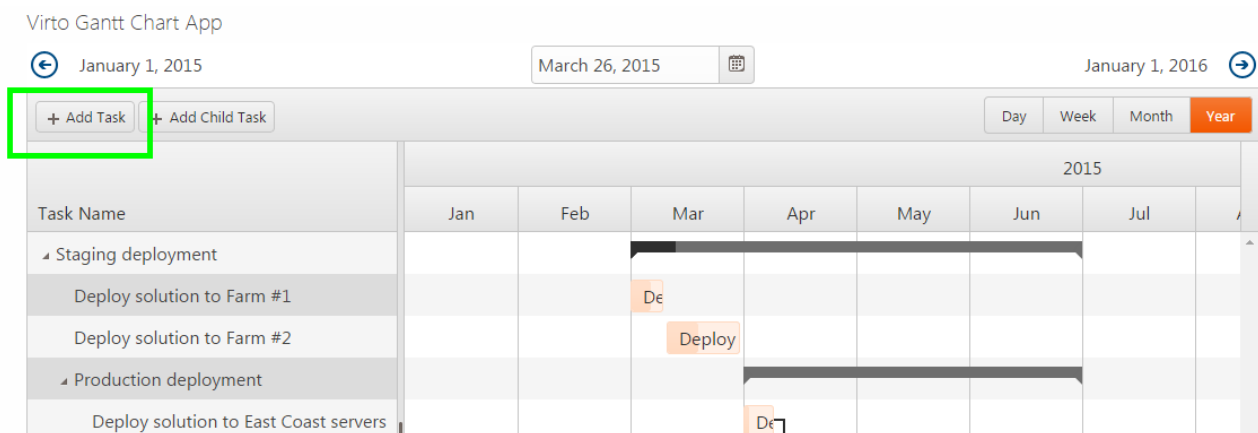
Task can be deleted (if data source is not read only) by clicking “X” icon in right upper corner of the task.



Creating a Task

Virto Gantt Chart App for SharePoint Online / SharePoint 2013 allows users to create task right in the app. The same changes will be done in SharePoint list.

Clicking “+ Add task” button will open form for creating new task. First drop down list is used for selecting data source where user wants to add new task.



Type the title (“New task” by default) and define start and end time of your new task.

By default the new task will appear at the end of the list (or on the other position depending of chosen view).

The task will appear in the Gantt Chart on the right as well.

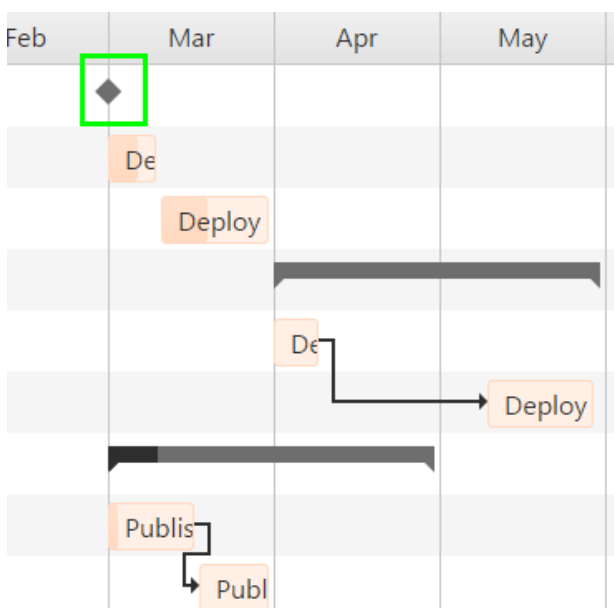
Create new task

Data source:	<input type="text" value="Development project"/>
Task name:	<input type="text" value="New task"/>
Start date:	<input type="text" value="3/24/2015 3:36 PM"/> <input type="button" value="Calendar"/> <input type="button" value="Clock"/>
End date:	<input type="text" value="3/24/2015 5:36 PM"/> <input type="button" value="Calendar"/> <input type="button" value="Clock"/>
Percent complete:	<input type="text" value="0"/> %
Resources:	<input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Milestone

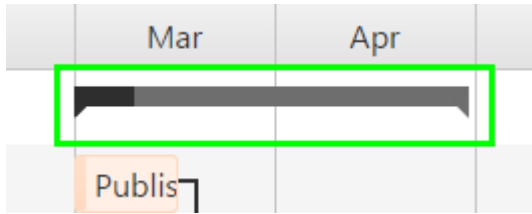
When task start date equals task end date the task is displayed as milestone.

If you create new task as described in previous section and define equal start and end date and time, it will be shown as milestone - task with zero duration.



Child task

Sometimes you need to define parent-child relations between tasks in the Gantt Chart App. If tasks list is selected as data source, user can select some task in Virto Gantt Chart App and add child task to it. If task has child task it is displayed as a summary task.



If you want to make selected task a child task (sub-task), highlight the parent task which will contain new child task and use “+ Add child task” button. In this case SharePoint list data source must be also a task list. You can select more than one task and make all of them child-tasks with “+ Add child task” action.

The screenshot shows the Virto Gantt Chart App interface. On the left, a list of tasks is displayed. The task 'Deploy solution to Farm #2' is highlighted in orange. Above the task list, there are two buttons: '+ Add Task' and '+ Add Child Task', with the latter being highlighted by a green box. On the right, a Gantt chart shows a task bar for 'Deploy solution' spanning from Sunday, March 1st to Sunday, March 8th. A 'Create child task' dialog box is open, showing the following fields:

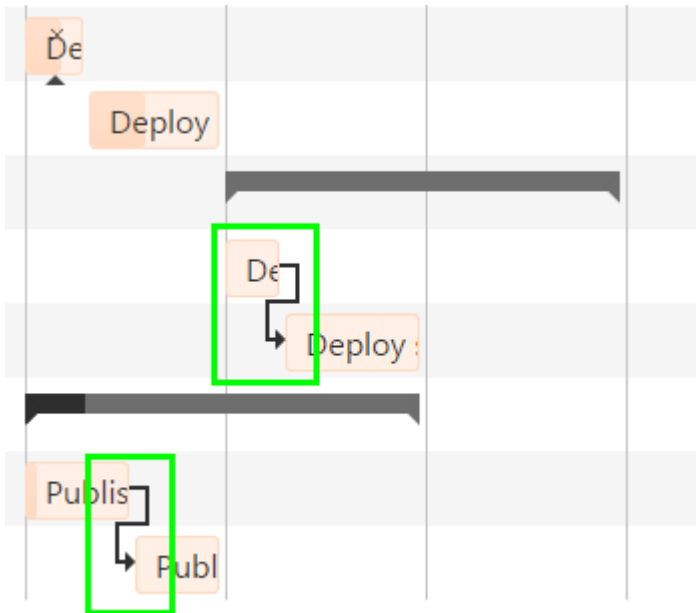
- Task name: Child for Deploy solutic
- Start date: 3/11/2015 12:00 AM
- End date: 3/11/2015 2:00 AM
- Percent complete: 0 %
- Resources: (empty field)

At the bottom of the dialog box, there are 'Save' and 'Cancel' buttons.

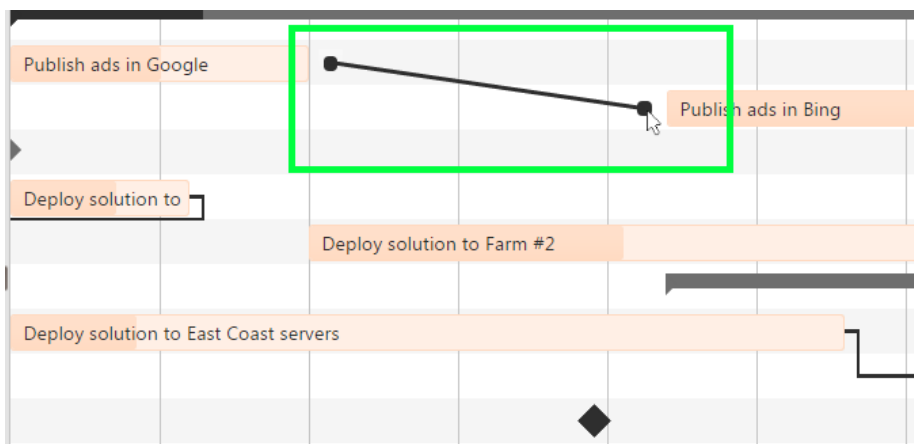
Predecessor and successor tasks

Virto Gantt Chart App for SharePoint Online / SharePoint 2013 allows users to display successors and predecessors relationship.

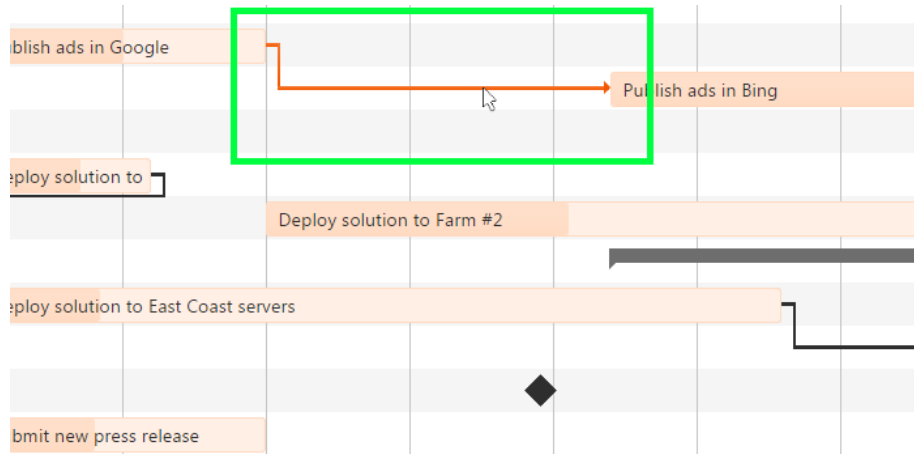
Predecessor and successor tasks are connected through arrows. Successor will start after predecessor.



Virto Gantt Chart Web Part allows users to define finish-to-start relations between tasks and create successors and predecessors by simple arrows drag-and-drop. Just click a task that will be a predecessor and drag the arrow to a task which you want to make a successor.

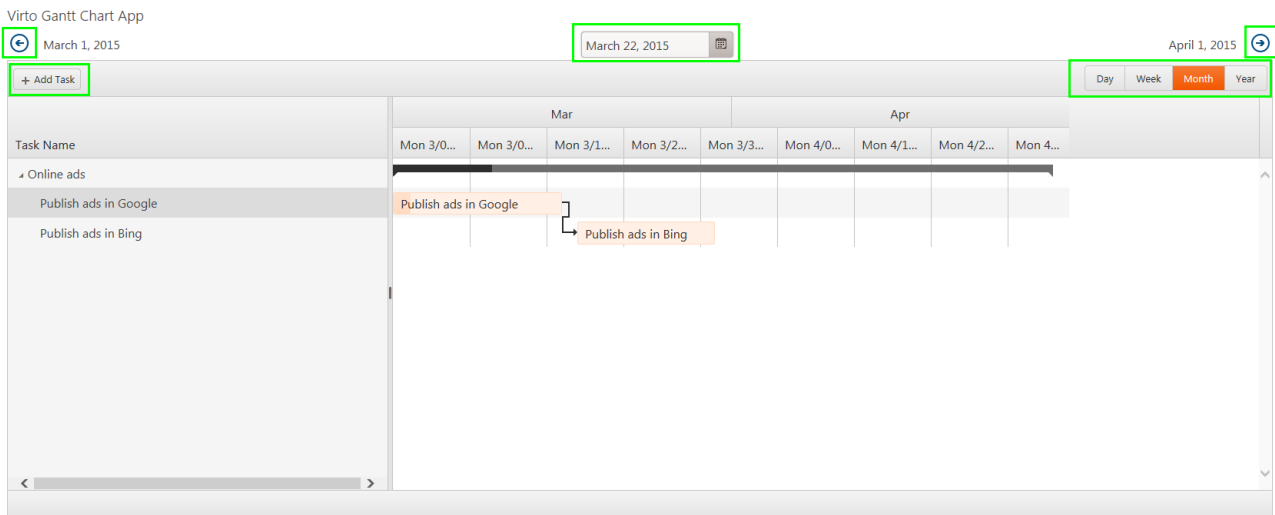


To delete the dependency just click and select the arrow and then press “Delete” on keyboard.



Timescale

You can easily switch to required timescale in Gantt Chart App. Click “Timescale” and select required scale view for the chart. The following options are available: “Days”, “Weeks”, “Months” and “Year”.



Resources

Users assigned to a task are displayed near corresponding tasks in the chart, if this column added to data source view (see app settings to adjust).

Users will be taken from SharePoint list. To assign a new user, just double click task and select required user. The same changes will be done in SharePoint list.

Edit task

Task name: Deploy solution to Farm

Start date: 3/11/2015 12:00 AM

End date: 3/30/2015 11:00 PM

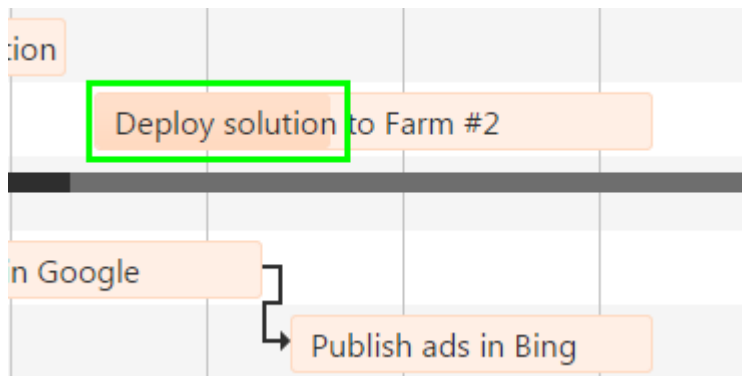
Percent complete: 42 %

Resources: Nick Brook x

Delete Save Cancel

Percent Complete

The percent complete is displayed as different color area of the task body.



Percent complete can be changed by drag & drop percent complete icon.

