



Virto Portfolio Project Manager for Office 365

User Guide

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1. Product overview

Virto Project Portfolio Manager (PPM) for Office 365 allows users to control workload of resources - workers or technical resources involved into a business process.

PPM is a highly customizable project management & planning solution. Here users are able to create projects, set roles and resources for each of them to see the whole structure of existing projects and manage working hours within organization. Users can also track dates and a workload in a Gantt Chart.

PPM helps managers to easily assign resources in projects based on their availability, skillset and existing load.

Tool helps to identify problems like overbooking of resources or appeared days off which create gaps in planned workload.

Automatically calculated statuses give simple instructions: how many resources' working hours need to be added or removed to complete each project.

1.2. Key features

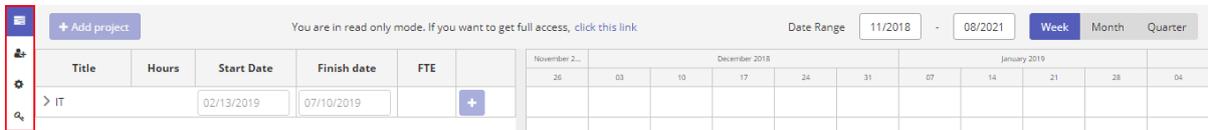
- Manage the working hours of resources and their involvement in projects with ease
- Set unlimited number of projects and roles
- Set required hours for each role and view completion status in real time while adding resources
- Assign your resources to roles in the most effective way with skillset match rate indication
- Control FTE for each resource in each project
- Identify and resolve overbooking issues in simple and visual UI
- Choose Calendars according to countries with government holidays
- Manage individual Calendar for any employee with personal days off, holidays, sick days, etc.
- View and manage your projects, roles and resources in Gantt Chart

2. Glossary

- **Program** (a global business process) may include one or several projects.
- **Projects** are filled with roles that aim to maintain their processes.
- **Role** is a requirements description intended to fulfill a certain work process in a project.
- Each role involves **skills**. You define roles with required skills and then add matching resources.
- **Resources** can be assigned to project roles according to their skills and existing workload. For example, John Doe is a resource with role Developer and skill JavaScript.
- **FTE (Full-time equivalent)** - manage an employee's working time assigned to a certain project.

3. Interface

In product's UI you can see left menu with 4 different sections: Projects, Resources, Settings and License.



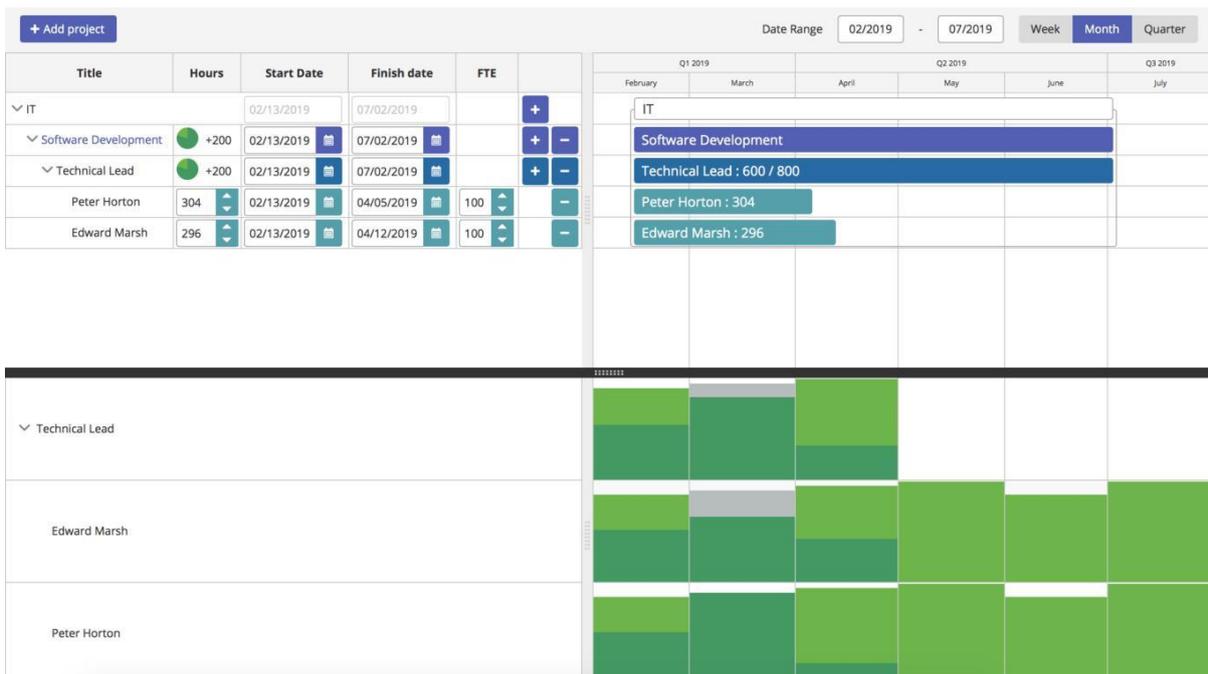
The information which you'll add to sections Resources and Settings will be displayed on the main window - Projects.

License section allows you to keep track of your subscription and update it when necessary.

3.1. PROJECTS

The PPM's interface contains 3 sections:

- **Projects Management** - a list of all running projects, roles, and resources with dates of start and finish, working hours, FTE.
- **Gantt Chart** - here all information from section Projects displayed in a visual way on a timeline.
- **Roles List & Chart** - a list of all roles and resources with visualized workload.



3.1.1. Projects Management

Here are displayed all active Programs, Projects, Roles and Resources. This is a hierarchy of PPM. In this window you allocate resources among running projects.

+ Add project					
Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development	+196	02/13/2019	07/02/2019		+ -
Technical Lead	+196	02/13/2019	07/02/2019		+ -
Peter Horton	300	02/13/2019	04/05/2019	100	-
Edward Marsh	304	02/13/2019	04/15/2019	100	-

Here you can find a list of all running projects, roles and assigned resources, set hours, dates of start and finish, FTE percentages (Full-time equivalent).

Define how many hours you'll need for each role to complete project – and easily fill those hours with available resources, managing their working dates and FTE.

Titles

The projects titles are clickable so you can view all details for a certain project just by clicking on its name.

+ Add project					
Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development	+196	02/13/2019	07/02/2019		+ -
Technical Lead	+196	02/13/2019	07/02/2019		+ -
Peter Horton	300	02/13/2019	04/05/2019	100	-
Edward Marsh	304	02/13/2019	04/15/2019	100	-

In the appeared window you'll be able to manage project information.

The 'Update project' dialog box has two tabs: 'Main' and 'Roles'. The 'Main' tab is active. It contains the following fields:

- Title *: Software Development
- Description : Input description
- Start date *: 02/13/2019
- Finish date *: 07/02/2019
- Program *: IT
- Is active:

Buttons: Ok, Cancel

Also here you can find a list of roles assigned to the project. Right here you're able to manage roles and define required skills for each role.

The 'Update project' dialog box has two tabs: 'Main' and 'Roles'. The 'Roles' tab is active. It contains an 'Add role' button and a table of roles.

Role	Start date	Finish date	Hours	Edit	Delete
Technical Lead	02/13/2019	07/02/2019	800		

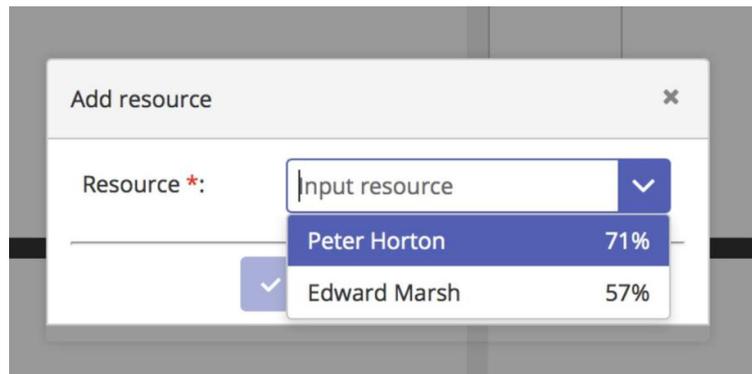
Buttons: Ok, Cancel

The 'Add role' dialog box is shown over the 'Roles' tab of the 'Update project' dialog. It contains the following fields:

- Role *: Input role
- Start date *: 02/13/2019
- Finish date *: 07/10/2019
- Hours: 848
- Skills: Input skill

Buttons: Ok, Cancel

Thus, when you add a resource to any role, PPM displays the degree of how the skills of the resource suits for the role (in percentages).



Hours

+ Add project						
Title	Hours	Start Date	Finish date	FTE		
IT		02/13/2019	07/02/2019		+	
Software Development	+196	02/13/2019	07/02/2019		+ -	
Technical Lead	+196	02/13/2019	07/02/2019		+ -	
Peter Horton	300	02/13/2019	04/05/2019	100	-	
Edward Marsh	304	02/13/2019	04/15/2019	100	-	

PPM product has a logic of automated calculations that makes workload planning way easier.

First you can define hours for each role within project. PPM automatically displays approximate finish date based on selected System Calendar and one resource's involvement.

Note that if project's dates are too short to include defined role's hours within only one resource, role's finish date is automatically limited by project's finish date, but you are able to add several resources to assign all hours required for the role in the project.

When you add resources, their assigned hours are distributed by dates according to their personal Calendars (not general System Calendar anymore), so you see certain finish dates of resource's work in project.

When you reduce or increase the working hours for a resource, it's instantly displayed in the column Hours opposite a title of a role and a project. You see the diagram indication and call to action: how many resources' hours you need to add or remove.

Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/10/2019		+
Project Development	+136	02/14/2019	07/03/2019		+ -
Software Development	-64	02/13/2019	07/10/2019		+ -
QA		02/14/2019	07/03/2019		+ -

When the roles and resources are perfectly configured, the circle has a dark green color. The light green color in a circle means that you have unassigned working hours. Red color means you assigned to resources more hours, than role require.

Start date and Finish date

Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development	+196	02/13/2019	07/02/2019		+ -
Technical Lead	+196	02/13/2019	07/02/2019		+ -
Peter Horton	300	02/13/2019	04/05/2019	100	-
Edward Marsh	304	02/13/2019	04/15/2019	100	-

Any project has dates of start and finish. All roles are limited by the project period and resources by the role's period. Dates are automatically controlled by Hours or FTE.

FTE

Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development	+196	02/13/2019	07/02/2019		+ -
Technical Lead	+196	02/13/2019	07/02/2019		+ -
Peter Horton	300	02/13/2019	04/05/2019	100	-
Edward Marsh	304	02/13/2019	04/15/2019	100	-

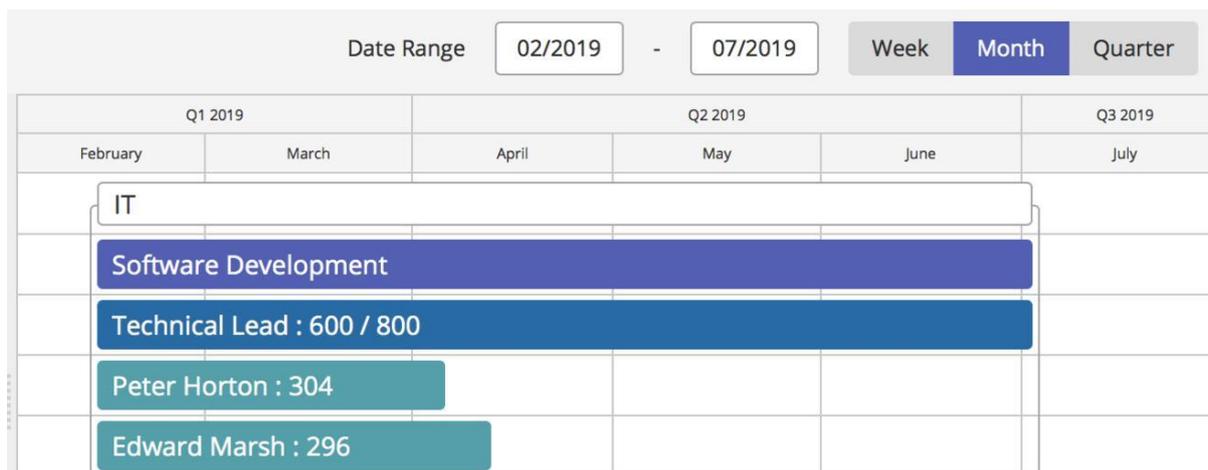
Manage an employee's working time assigned to a certain project. For example, if an employee works according to 8-8-8-8-0-0 weekly schedule, then FTE 50% will manage his weekly time into a project this way: 4-4-4-4-0-0.

If you scale FTE down, the project's finish date will be automatically recalculated and enlarged. But if you've completely filled role's dates with resource's dates and then decided to reduce FTE, the working hours for the resource will be automatically reduced.

If you increase FTE instead, the dates for a resource will be reduced.

3.1.2. Gantt Chart

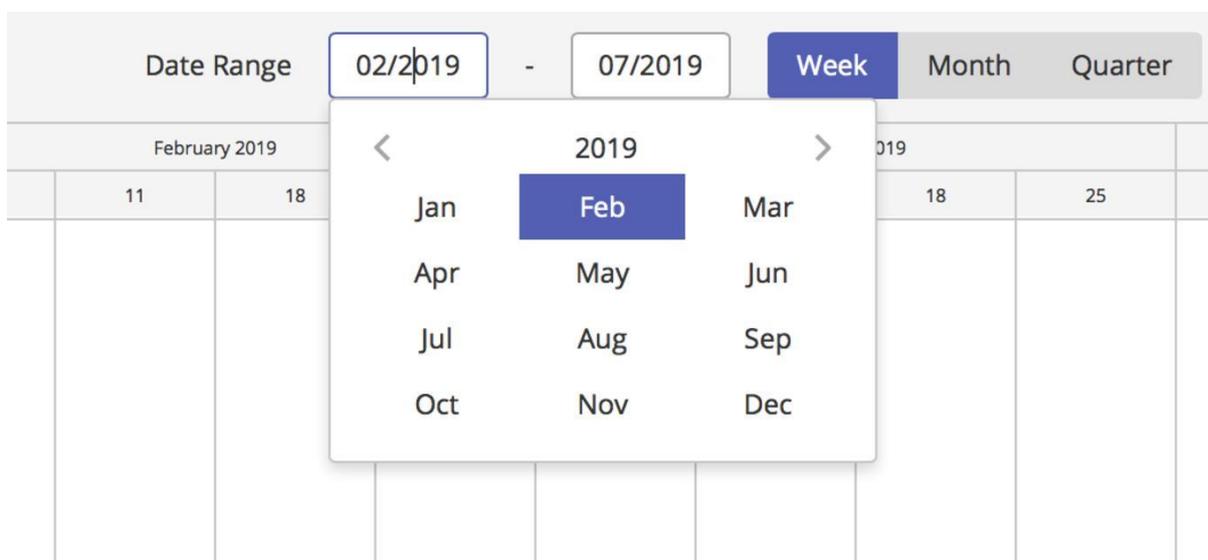
This is an indispensable and effective tool for project visualization.



Gantt Chart Modes

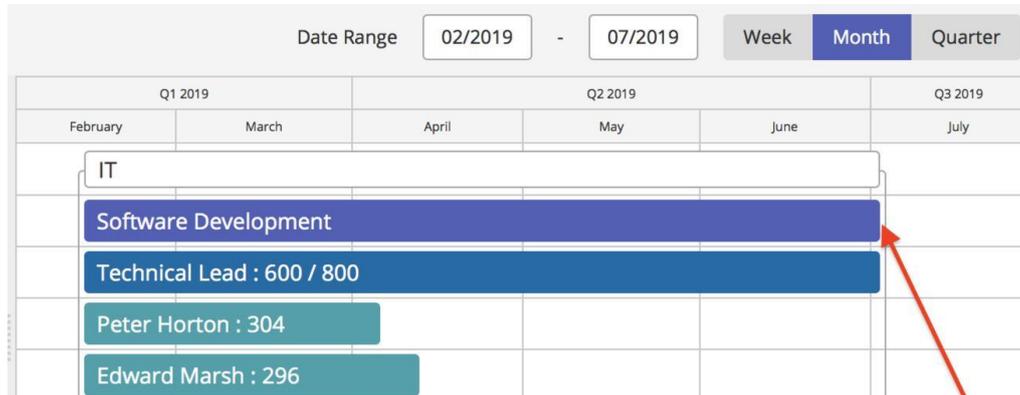
All your projects, roles and resources are displayed here. You can set a timescale to see projects and an appropriate workload in a preferred zoom level. The information can be displayed in Week, Month and Quarter modes.

Also here you can choose Date Range – the period to be displayed.



Features

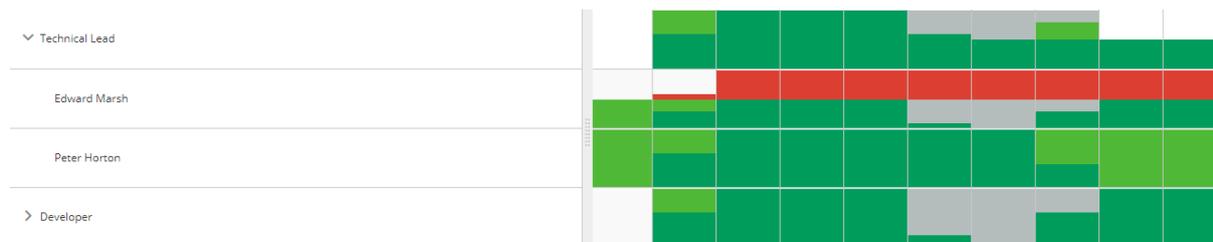
You can manage dates (start and finish of every project, role or resource) right here. For example, if you want to move the finish date of a project, just click on the end of its chart and pull it in the right direction.



Don't forget the hierarchy – on a Gantt Chart it's the same, dates of any role are limited by the dates of a project, and the dates of a resource are limited by the dates of a role.

3.1.3. Roles List & Chart

Here is a list of roles and resources assigned to running projects and a chart with their workload.



Focus on roles and resources management

If you have any identical roles in the running projects they'll be rolled up into the single one. Here the affiliation to project goes to the background to let you focus on roles and resources management.

Color coding

PPM allows you to track the workload for roles by colors:

- Light green – the employees assigned to the role have some free time, they're available for more workload;
- Dark green – shows amount of assigned workload.
- Grey – the employees assigned to the role have some days off in this period (holidays, sick days, etc.). To resolve this, you can go to the employee's calendar and check why he's out in a required period. This gives you the tool

to fill gaps by negotiating with the employee about days off or just assigning other resources in required period.

- Red - some of your employees are overloaded so you need to remove the overloaded employee from the project or reduce FTE.

Filtering

A click on any color coded element filters this employee or role in a certain period in your Projects Management area, in order to make it easier to identify problems.

Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/10/2019		+
Project Development	+136	02/13/2019	07/02/2019		+ -
Developer	+136	02/13/2019	07/02/2019		+ -
Edward Marsh	704	02/13/2019	07/01/2019	100	-
Software Development		02/13/2019	07/10/2019		+ -
Technical Lead		02/13/2019	07/02/2019		+ -
Edward Marsh	560	02/13/2019	06/05/2019	100	-

3.2. RESOURCES

This section allows you to manage all company's resources, see full roles and skills catalogs.

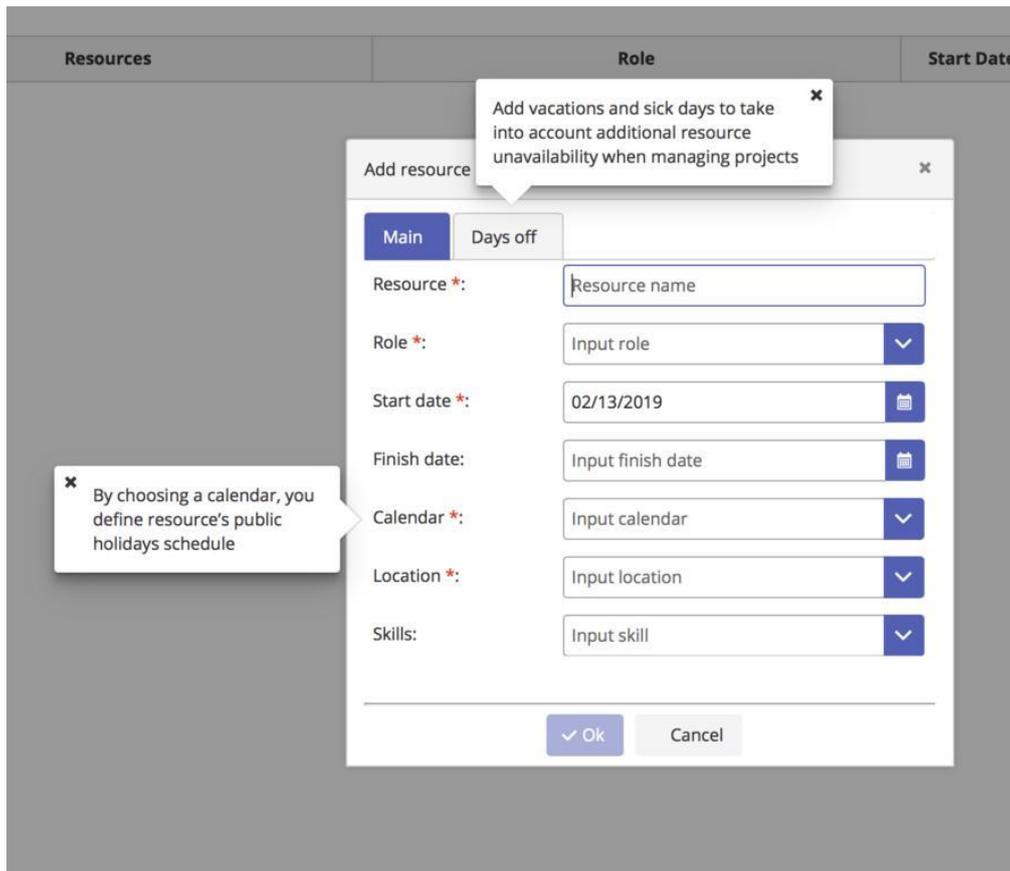
3.2.1. Resources Tab

By clicking on the second element in the top left menu you can get to the Resources page. When you manage projects, you can add to the roles resources from this list.

Resources	Role	Start Date	Finish Date	Calendar	Location	Edit	Delete
Edward Marsh	Technical Lead	02/13/2019	06/20/2019	Common	New York	✎	🗑️
Peter Horton	Software Developer	02/18/2019	06/21/2019	Common	Moscow	✎	🗑️

Here you can add or delete resources and edit their information: primary roles of this resource and a skillset, calendar, location.

In a separate tab you can manage resource's Days off, that are included in his schedule besides government holidays (according to the selected calendar).



3.2.2. Roles Tab

The section Roles allows to see a full list of existing roles and to add some new ones. For better managing process, make sure same roles don't have several names.

Resources				Roles	Locations	Skills	+ Add role	
Role							Edit	Delete
Technical Lead							<input type="checkbox"/>	<input type="checkbox"/>
Software Developer							<input type="checkbox"/>	<input type="checkbox"/>

3.2.3. Skills Tab

The next section is Skills. Here you can see the full catalog of skills and add or delete them as well.

Resources				Roles	Locations	Skills	+ Add skill	
Skills							Edit	Delete
computer science							<input type="checkbox"/>	<input type="checkbox"/>
computer engineering							<input type="checkbox"/>	<input type="checkbox"/>
website systems							<input type="checkbox"/>	<input type="checkbox"/>
shell scripting							<input type="checkbox"/>	<input type="checkbox"/>
Python							<input type="checkbox"/>	<input type="checkbox"/>
Java Script							<input type="checkbox"/>	<input type="checkbox"/>
HTML							<input type="checkbox"/>	<input type="checkbox"/>

3.2.4. Locations Tab

The next section is Locations. Here is displayed a full list of all established locations to make the overview of how your resources are distributed across the country or the whole world.

Locations		Edit	Delete
Moscow			
New York			

3.3. SETTINGS

There are two sections: Programs and Calendars.

3.3.1. Programs Tab

Here is a full list of all your programs and projects.

Programs		Active	Edit	Delete
IT		<input checked="" type="checkbox"/>		
Software Development		<input checked="" type="checkbox"/>		

Activation and deactivation

Here you can activate or deactivate some projects or programs. Active projects/programs will be displayed on the section Projects, and deactivated ones will be hide.

3.3.2. Calendars Tab

Allows you to manage Calendars, add some new ones or edit the existing countries' Calendars. Here you can choose a System Calendar.

Calendars		Edit	Delete
Common			
Andorra			
Argentina			
Austria			
Australia			
Belgium			
Bulgaria			
Brazil			
Belarus			
Canada			
Switzerland			
Chile			
China			
Costa Rica			
Cuba			

System Calendar

The System Calendar determines the method of setting hours when users add new roles. It sets a standard workload, working hours and government holidays for each new role before certain resources with their schedules are assigned.

The Common calendar has no holidays and 5/2 working schedule with weekends on Saturday and Sunday.

Customized Calendars

PPM has automatically updated calendars for each country with all government holidays. You can choose a calendar according to your location or create your own one. This customization allows to set special holidays and working hours, and then assign this calendar for certain resources.

3.3.3 General Tab

The General tab allows you to define:

- System calendar;
- Show FTE column or not;
- Show budget column or not;
- Format date;
- Default constraint;
- Default currency.

Date Format

The Virto Portfolio Project Management app allows you to **specify the date format**. Go to the settings (key icon) and switch to the “General” tab. Find the “Format date” and click “Show formats” to see the list of available formats. When you know how to code the date format, type its new format in the field.

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Programs Calendars **General** Currencies

System calendar *: Common 5/2

Show FTE column:

Show budget column:

Format Date *: dd/M/yy **Show formats**

Example: 29/Sep/2021

Default Constraint *: Work

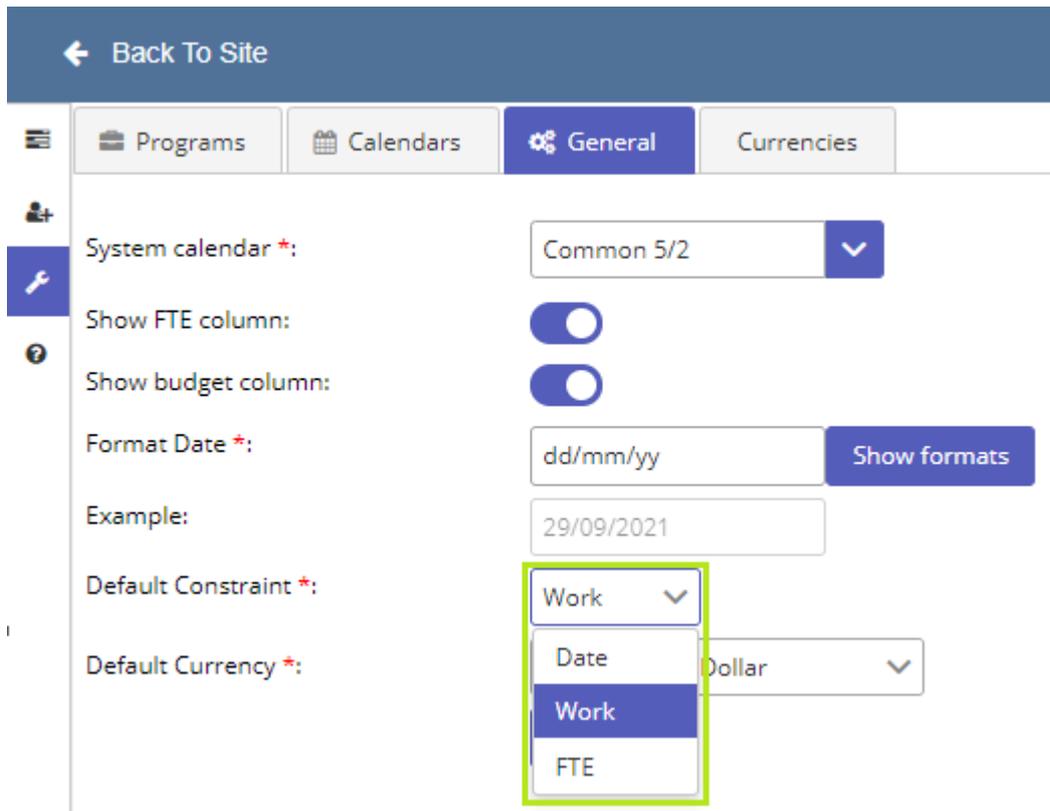
Default Currency *: United States Dollar

- d - day of month (no leading zero)
- dd - day of month (two digit)
- o - day of the year (no leading zeros)
- oo - day of the year (three digit)
- D - day name short
- DD - day name long
- m - month of year (no leading zero)
- mm - month of year (two digit)
- M - month name short
- MM - month name long
- y - year (two digit)
- yy - year (four digit)
- @ - Unix timestamp (ms since 01/01/1970)
- ! - Windows ticks (100ns since 01/01/0001)
- '...' - literal text
- " - single quote anything else - literal text Time

Default Constraint

Any project needs to consider limitations and risks to ensure the project's future success. There are three constraints that project managers usually take into account. We have added them to Project Management Portfolio settings: date, work, or FTE (full-time equivalent). Each constraint is connected to the other two. For instance, when you increase the amount of work, the project will likely require more resources. To keep the balance of this classic triangle, the system recalculates the parameters according to the chosen default one.

Open the same settings tab and find the "Default constraint" field. Choose the constraint you need.



Default Currency

Within the Virto Portfolio Project Management, you can add the currency. Go to the “General” tab of the app settings and find the “Default Currency” option. Here you can see the default currencies available for you in the dropdown.

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Programs Calendars **General** Currencies

System calendar *: Common 5/2

Show FTE column:

Show budget column:

Format Date *: dd/mm/yy [Show formats](#)

Example: 29/09/2021

Default Constraint *: Work

Default Currency *: United States Dollar

- United States Dollar
- Euro Member Countries
- Syria Pound

But if you need to add more currencies available for further choosing, switch to the “Currencies” tab and click “Add currency”.

3.3.4. Currencies Tab

In the Currencies tab you can more currencies available for further choosing.

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Programs Calendars General **Currencies**

[+ Add currency](#)

Currencies	Rate	Code	Symbol	Edit	Delete
United States Dollar	1	USD	\$		
Euro Member Countries	1.1	EUR	€		
Syria Pound	0.1	SYP	£		

Choose the currency from the list.

Add currency

Currency *:

Rate *:

Code *:

Symbol *:

- Albania Lek
- Afghanistan Afghani
- Argentina Peso
- Aruba Guilder
- Australia Dollar
- Azerbaijan Manat
- Bahamas Dollar

Fill in the fields and make sure you have defined the rate. Save the currency.

Add currency ✕

Currency *:

Rate *:

Code *:

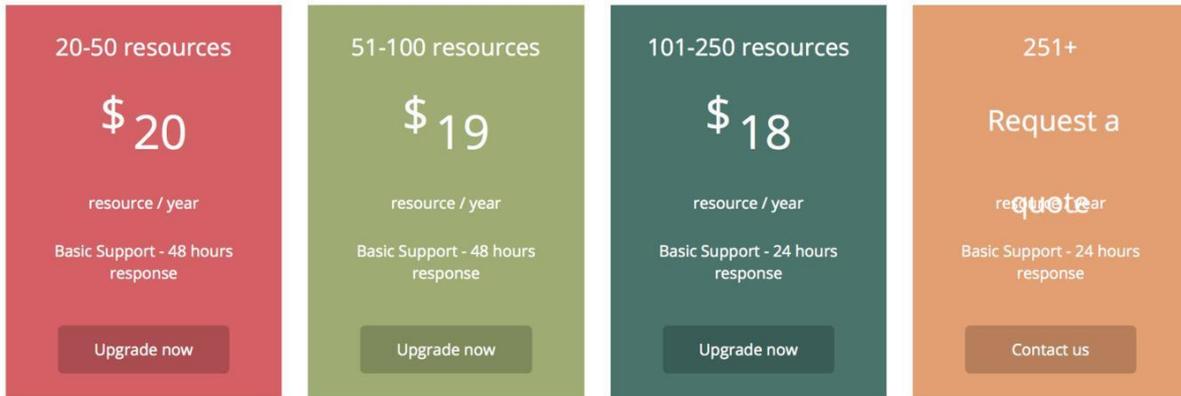
Symbol *:

Now you can use these currencies for the project costs calculation. This option is especially required when the company defines the internal rate for the currency.

4. License

License is a separate section that can be reached from the left menu. Here you can find a license status for Virto Portfolio Project Manager.

You can upgrade your license or extend it at any time.



5. How to start

1. Create a Program in Settings Tab.

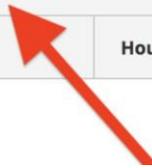
Add program

Program *:

Ok Cancel

2. Go to the main page and create a Project.

+ Add project					
Title	Hours	Start Date	Finish date	FTE	



Add project ✕

Title*:

Program*: ▼

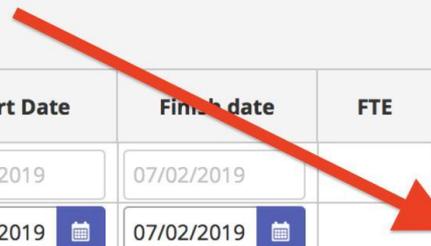
✓ Ok
Cancel

Give your project a name and in a drop-down menu choose a Program for the project (which you've created earlier) or just add a new one. Now you have your first project in the list.

+ Add project					
Title	Hours	Start Date	Finish date	FTE	
▼ IT		<input type="text" value="02/13/2019"/>	<input type="text" value="07/02/2019"/>		+
Software Development		<input type="text" value="02/13/2019"/>	<input type="text" value="07/02/2019"/>		+ -

3. Choose dates for your project - start and finish. It'll immediately appear in the Gantt Chart. The dates can be edited right on this Chart.
4. Add some roles (developer, designer, project manager, etc).

+ Add project					
Title	Hours	Start Date	Finish date	FTE	
▼ IT		<input type="text" value="02/13/2019"/>	<input type="text" value="07/02/2019"/>		+
Software Development		<input type="text" value="02/13/2019"/>	<input type="text" value="07/02/2019"/>		+ -



The screenshot shows a dialog box titled "Add role". It has two main input fields: "Role *:" and "Skills:". The "Role *:" field contains the text "Input role" and has a blue downward arrow icon on its right side. The "Skills:" field contains the text "Input skill" and also has a blue downward arrow icon on its right side. Below these fields, there are two buttons: a blue "Ok" button with a white checkmark icon and a grey "Cancel" button.

If you've created a catalog of required roles and skills, then just choose it in a drop-down menu. Otherwise you can create it right here. You can set any number of skills for a role.

The screenshot shows the same "Add role" dialog box, but with a dropdown menu open for the "Skills:" field. The "Role *:" field now contains "Technical Lead" and has a blue plus icon on its right side. The "Skills:" field contains "Input skill" and has a blue downward arrow icon. The dropdown menu is open, showing a list of skills in blue boxes with a white 'x' icon on the right: "computer science", "computer engineering", "website systems", "shell scripting", "Python", "Java Script", and "HTML". At the bottom, there are two buttons: a blue "Ok" button with a white checkmark icon and a grey "Cancel" button.

When the role is created, you can fill in for it the amount of hours that the project requires.

By default, it's set for 800 working hours or is limited to lesser amount of hours that fits into a certain project dates (but you can edit this number the way you need). When role is created, its hours are distributed by dates according to the System Calendar, like if there was only one resource involved – to help with your project dates planning. You can, however, set more hours, than limited by project's dates – that would just mean you need more than one resource to fill this project's role.

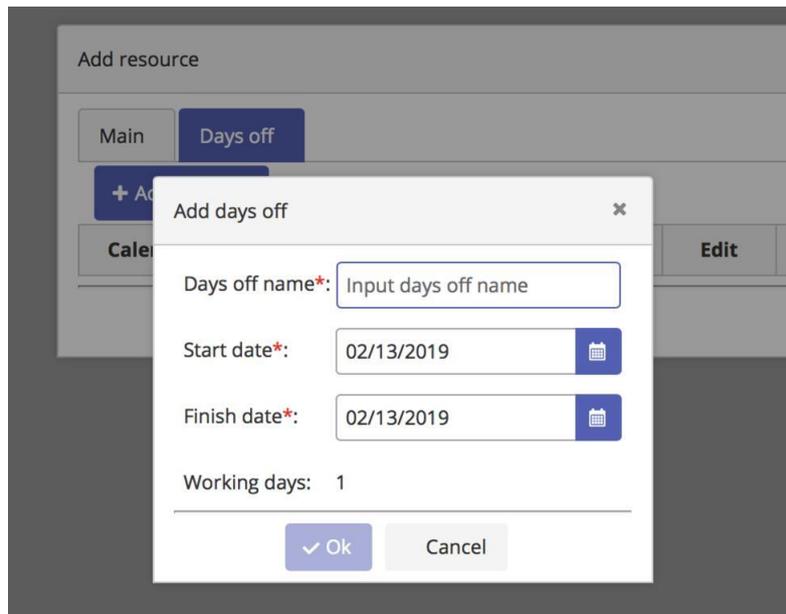
Default System Calendar is the Common calendar. The Common calendar has no holidays, 5/2 working schedule with weekends on Saturday and Sunday. If you need to set any other calendar as System Calendar, go to the section Settings to tab Calendars.

5. After filling project with roles, you need to create a list of resources in order to add them for the roles. You can manage your resources list in Resources section.



Click on the Add resource button and in the appeared window you'll be required to add information about the resource (name, role, calendar, location and more).

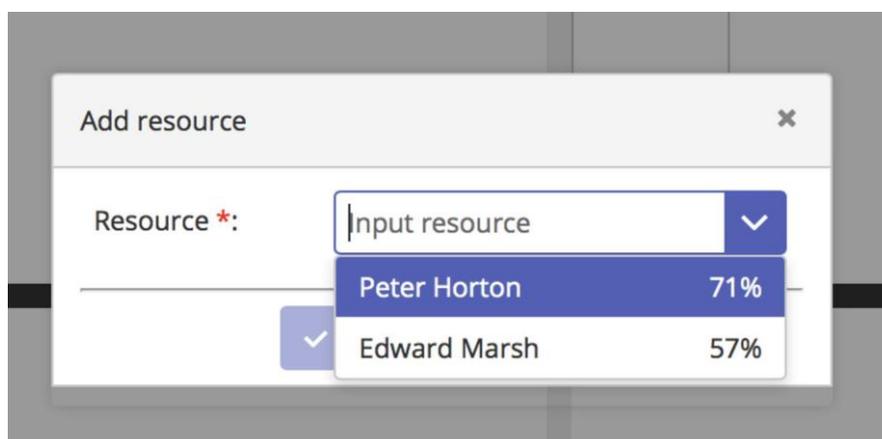
You can also go to the Days Off tab to set some personal vacations, add sick days, etc.



6. Now you can add newly created resources for the roles in the Projects section.

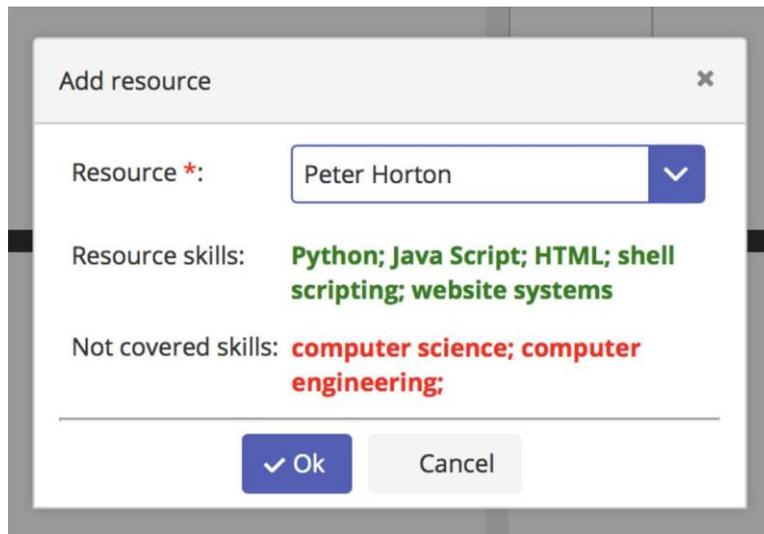
+ Add project					
Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development		02/13/2019	07/02/2019		+ -
Technical Lead	800	02/13/2019	07/02/2019		+ -

After clicking “plus” button you can add a resource from the drop-down list.



Here you can see the match rate of how the skills of the resource suits for the role (based on information you filled before).

When you choose a resource, you also see a detailed report with role skills comparison.



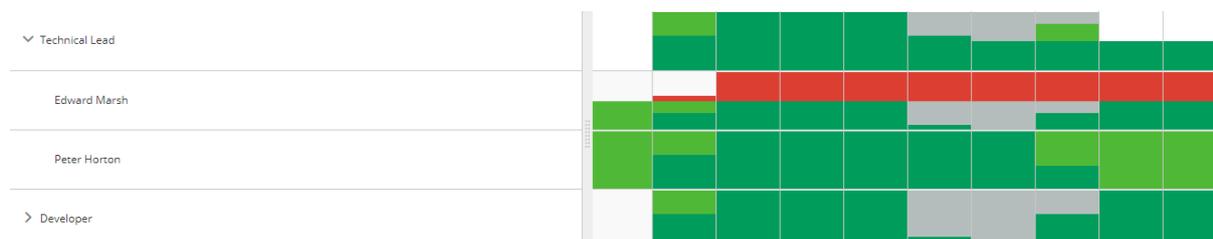
After adding resources to roles, your project is almost ready. Now you need to optimize the working hours for roles and resources. The indicator is displayed in the column Hours opposite a title of a role or a project (summary for the roles included). Just add or remove resource's working hours according to the instructions that are recalculated in real time.

Title	Hours	Start Date	Finish date	FTE	
IT		02/13/2019	07/02/2019		+
Software Development	+196	02/13/2019	07/02/2019		+ -
Technical Lead	+196	02/13/2019	07/02/2019		+ -
Peter Horton	300	02/13/2019	04/05/2019	100	-
Edward Marsh	304	02/13/2019	04/15/2019	100	-

For example, if there is a circle with light green color and +140 label, it means that you have some more working hours for a role, but there are not enough assigned resources. So you need to set more working hours for the existing resources or to add more resources.

If the circle is red that means that you set more working hours for resources than needed for a certain role. The solution is to reduce a working hours for your resources.

Also check the Roles Chart to avoid the overbooking of resources (red color) or to understand resources days off (grey).



You can check out a detailed workload of every resource by clicking on the needed part of the chart – filter in your projects list area will be implemented to show projects and roles in which resource is involved in specified dates period.

+ Add project		✕ Edward Marsh: 18 February 2019					
Title	Hours	Start Date	Finish date	FTE			
IT		02/13/2019	07/10/2019		+		
Project Development	+136	02/13/2019	07/02/2019		+ -		
Developer	+136	02/13/2019	07/02/2019		+ -		
Edward Marsh	704	02/13/2019	07/01/2019	100	-		
Software Development		02/13/2019	07/10/2019		+ -		
Technical Lead		02/13/2019	07/02/2019		+ -		
Edward Marsh	560	02/13/2019	06/05/2019	100	-		