



## **Virto Resource Manager App for Office 365**

### **User and Installation Guide**

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## **System/Developer Requirements**

### **Operating System**

SharePoint Online / Office 365

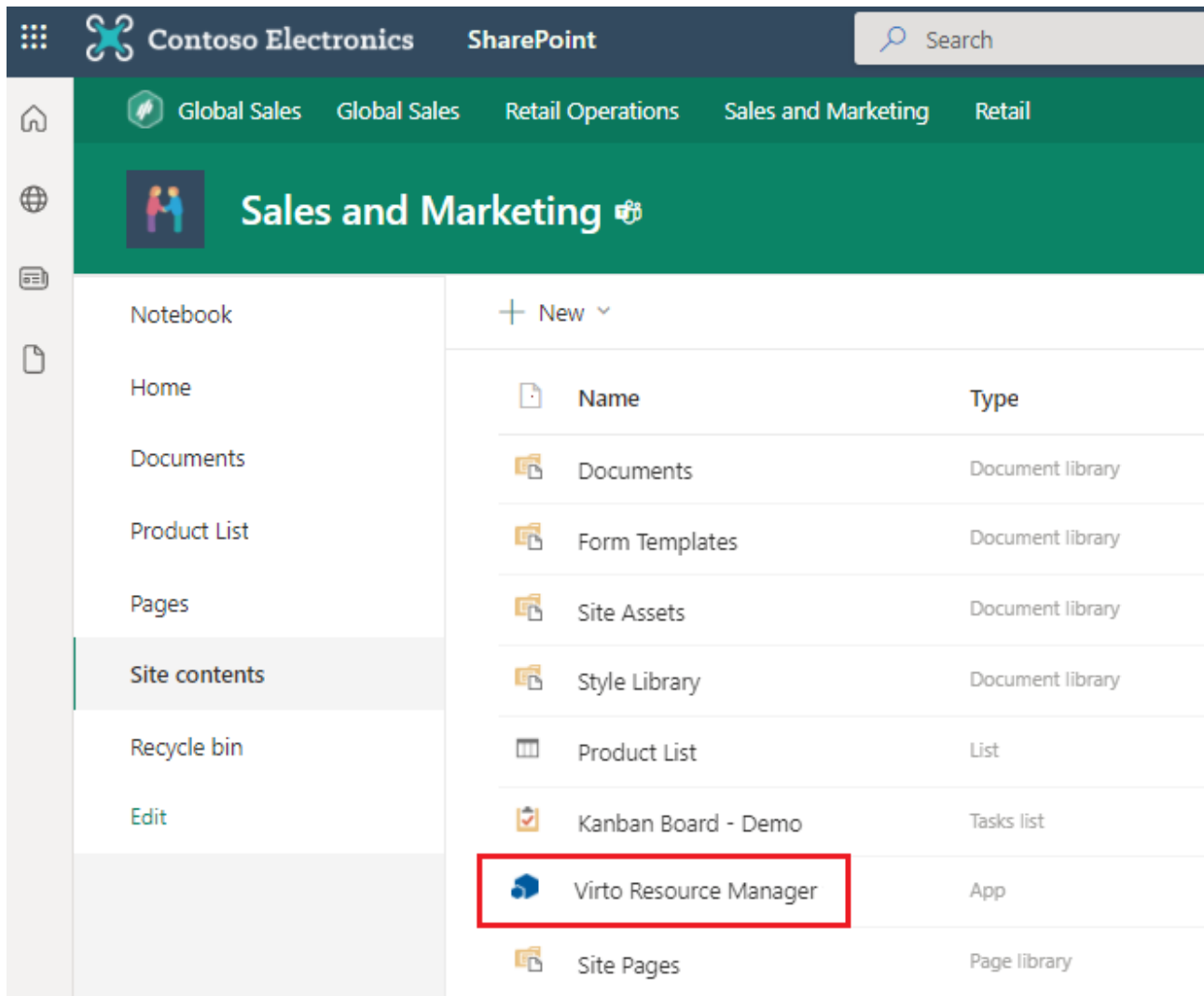
### **Browser**

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

## Installation

Before you begin, you need to make sure you have access to the server and your account has the appropriate administrative privileges to install applications.

When Office 365 Resource Manager Add-In is installed, it automatically appears on your site in the Site Contents.



## First start

Click on Office 365 Resource Manager icon to open the app.

You will be redirected to a page with Resource Manager overview and 2 buttons to create a first chart.



**Note:** the first user who added a chart gets the Administrator permission for this app. See more in the [“Users”](#) section.

The “Create demo chart” button automatically adds a new resource and creates a chart, which will be used as default chart until you set another chart as default.

When you add Virto Resource Manager app to a page, this demo chart will be displayed unless you select another one. See more in the “[Adding App to a SharePoint site](#)” section.

“Create first chart” button starts the creation of a new resource. See more in the “[Create a new resource](#)” section.

#### Create resource settings

SharePoint resource list name:\*

Type site url:\*



Refresh

Select list:\*

Displayed view:

Task title field name:\*

Start date field name:\*

End date field:\*



Save

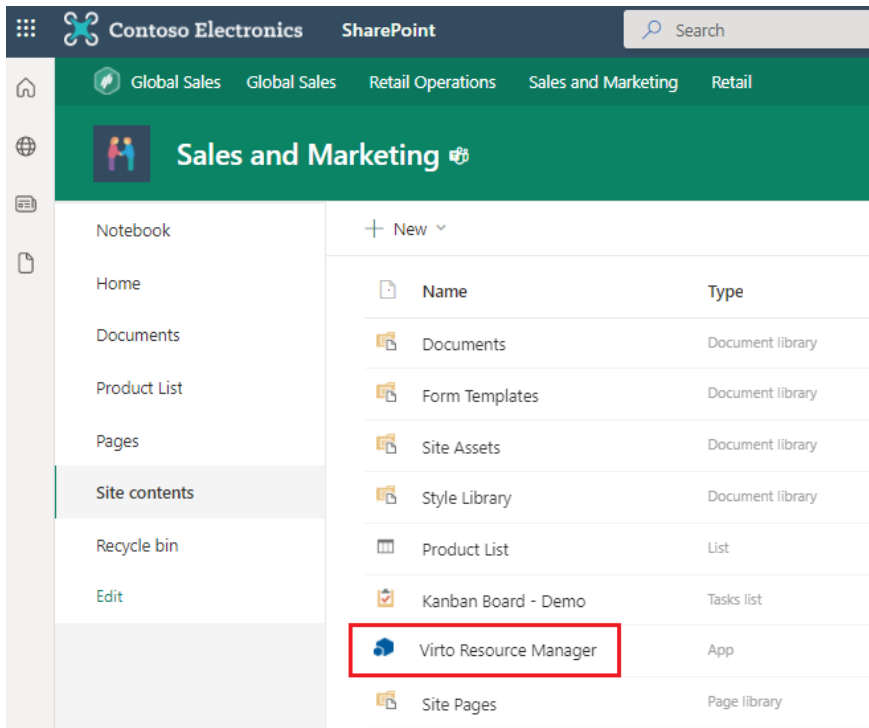


Cancel

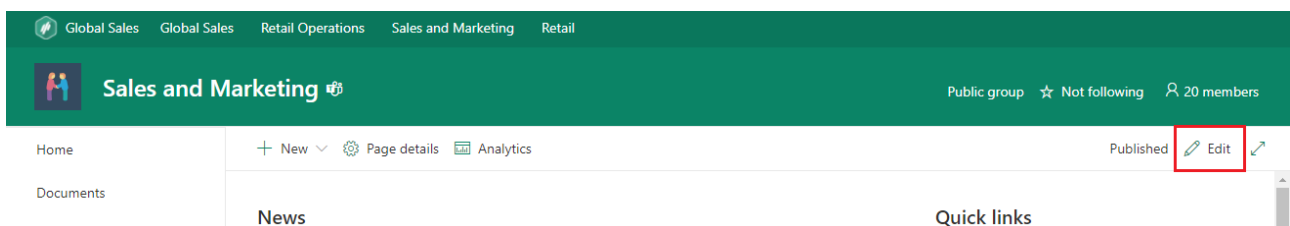
## Administration and Usage

### Adding App to a SharePoint site

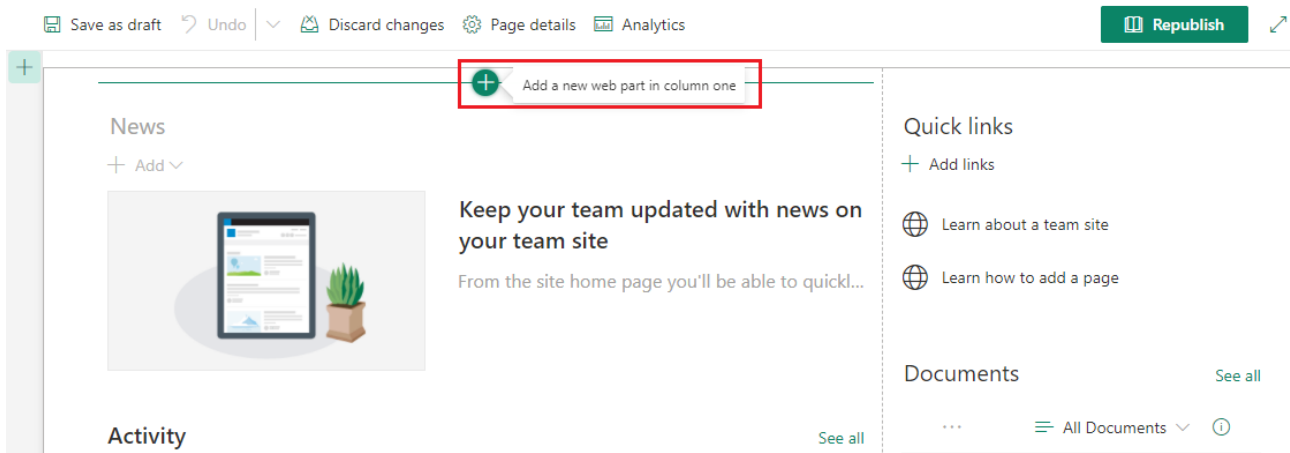
You can use Resource Manager app on a separate page (just click the link in the Site contents then), or add it as a web part to a SharePoint site page.



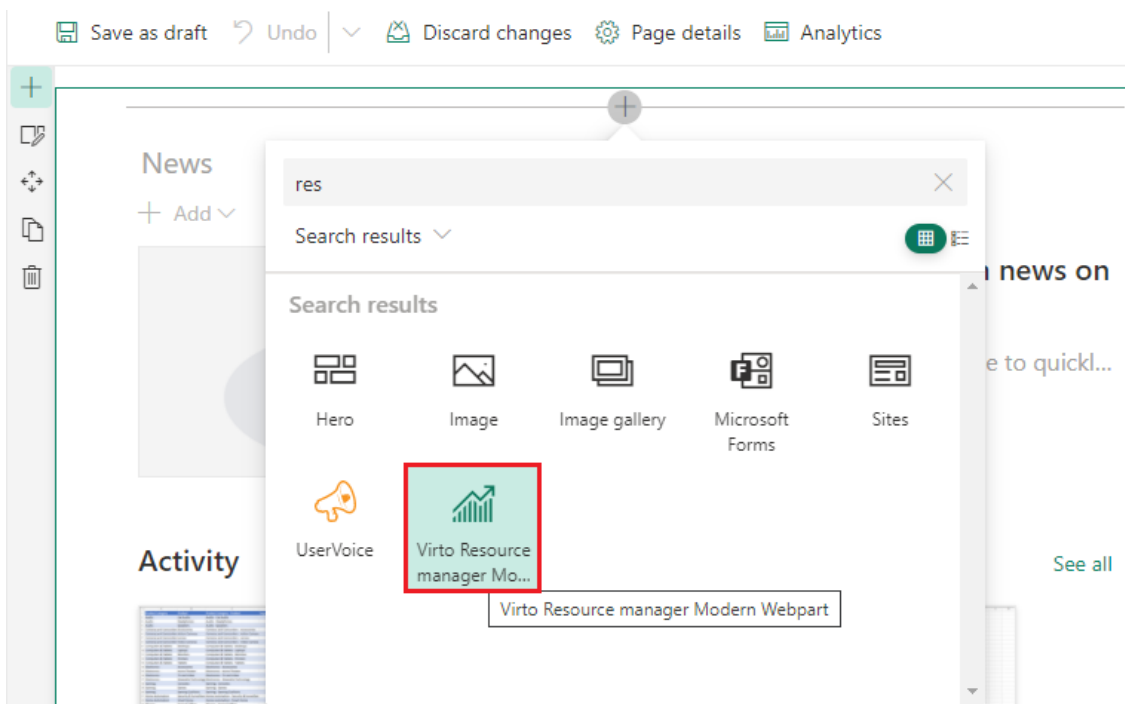
Navigate to the SharePoint site where you need to add the Resource Manager app and switch to the edit page mode.



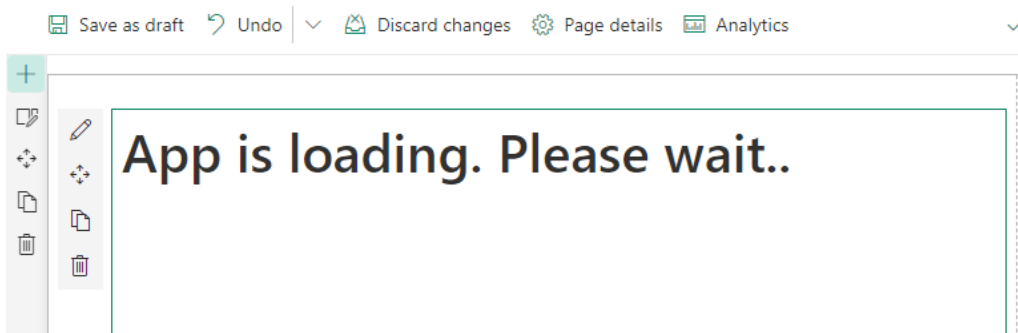
Click the plus in the part of the page where you're going to add the app and then "Add a new web part".



Search for **Virto Resource Manager Modern web part** and choose it for adding to the page.



Then wait until the app is loaded and start using.



If you already have at least one Resource Manager chart existing on your site collection, you can apply it to be displayed on this page. Otherwise, please return to the “[First Start](#)” instruction to create a new chart.

**Note:** a chart may contain one or more resources.

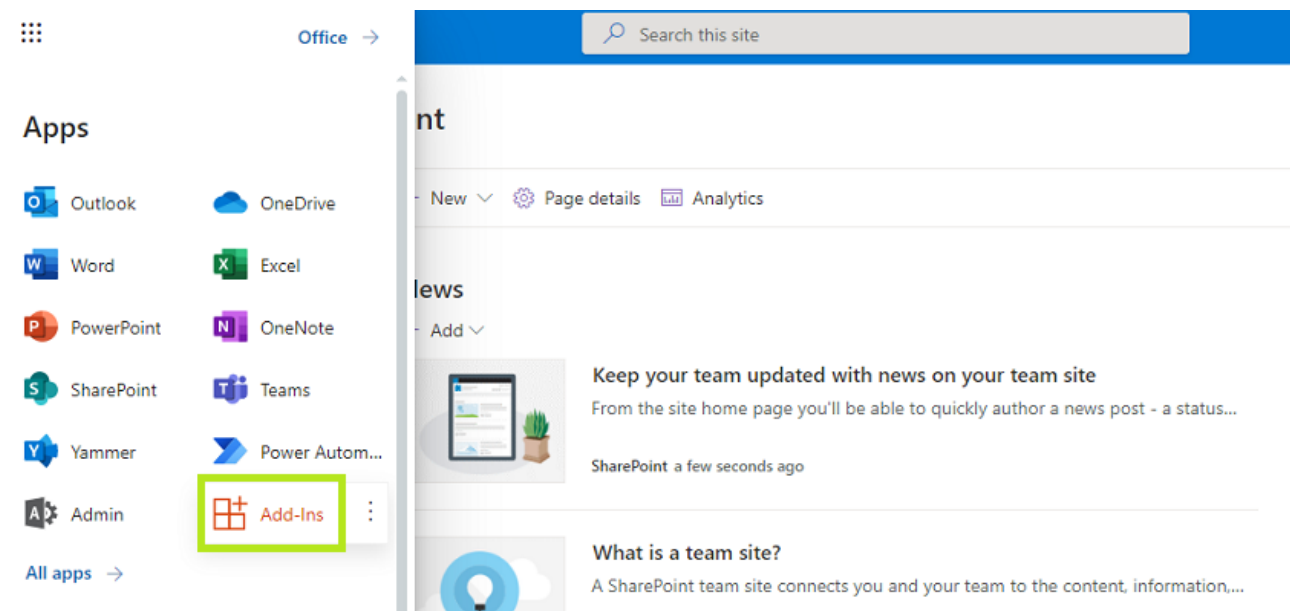
## Adding App to Modern SharePoint site and Teams

Download the SPFx app from the Microsoft store and install it.

Open **Apps** on your SharePoint site.



Choose **Add-Ins**.



Then search for **Virto Resource Manager for SP** app and click “Get it now”.



Microsoft | AppSource More ▾ Apps ▾ resource X →


Filters Clear all

Search filters

- Products (1)
- Categories
- Industries
- Trials
- Pricing Model
- Ratings
- Compliance ⓘ

Microsoft 365 X

All results



**Resource Manager SP by Virtosoftware**

Virtosoftware

SharePoint

Manage your resources for projects and tasks using Gantt View


★ 5.0 (3 ratings)

Additional purchase may be required

[Get it now](#)

You may be offered to fill in the form. Please enter the required data in this case.

One more thing ...



**Resource Manager SP by Virtosoftware**  
By Virtosoftware

This app requires some basic profile information. We have pulled your Microsoft Account data to help you get started. AppSource will save your information for next time.

Name \*

Work email \*

Job title

Company

Country / region \*  ▾

Phone number \*

☒ I give Microsoft permission to use or share my [account information](#) so that the provider or Microsoft can contact me regarding this product and related products. I agree to the provider's [terms of use](#) and [privacy policy](#) and understand that the rights to use this product do not come from Microsoft, unless Microsoft is the provider. Use of AppSource is governed by separate [terms](#) and [privacy](#).

You're signed in as MOD Administrator (admin@M365x13006428.onmicrosoft.com).

[Continue](#)

Then follow the steps as described on the **Add Apps for SharePoint** page.

## Add Apps for SharePoint

To add this app to your site, you'll need to have the latest version of SharePoint installed. [Get the newest version of SharePoint.](#)

1. Go to the SharePoint site where you want to install this app.  
The URL might look like this: <http://mycompany/myteam>.
2. Click the **Settings** icon at the top right corner of your site, and then click **Add an app**.



3. In the ribbon at the top of the page, click the **SharePoint Store** button.
4. In the **Search by app name or publisher** search box, paste the following tag and then press Enter.

WA200003937

5. Click on the app tile to continue the installation.

Don't see the **Settings** icon or link? You may not have the latest version of SharePoint, or you may not have site admin privileges. [Learn how to get the newest version of SharePoint or install an app from the SharePoint Store.](#)

[Return to the Office Store](#)

## Add the Resource Manager SP by Virto.

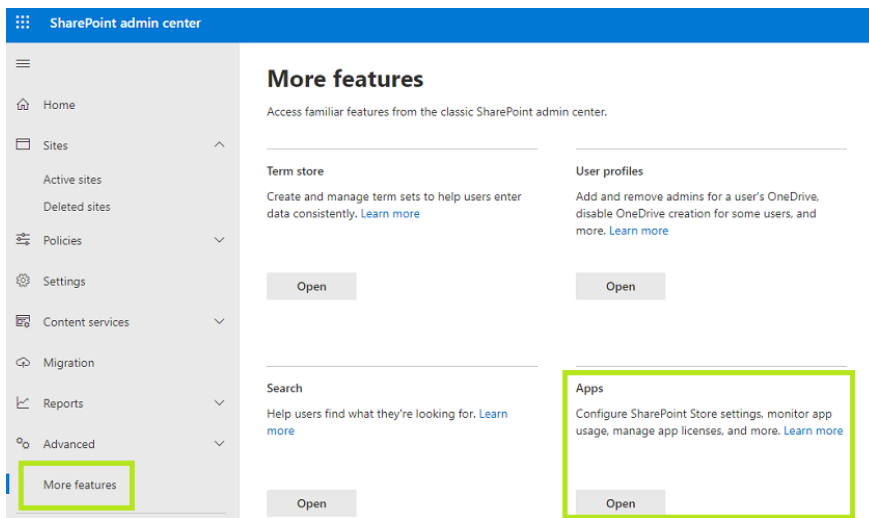
The screenshot shows the SharePoint Store interface. At the top, there's a search bar with 'WA200003939' entered. Below the search bar, it says '1 result found for "WA200003939"'. On the left, there's a 'Categories' sidebar with options like 'All', 'Best Apps of the Year', 'Business', etc. The main area displays a single app tile for 'Resource Manager SP by Virto'. The tile includes the app icon, name, publisher 'VirtoSoftware', a description 'Manage your resources for projects and tasks using Gantt View', and a rating of 5 stars (3 ratings).

On the next step, you may see either the **“Purchase”** or **“Request”** button.

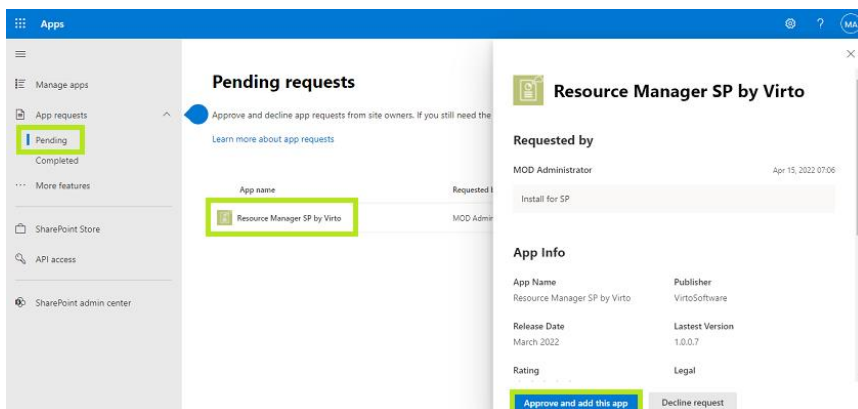
The screenshot shows the app page for 'Resource Manager SP by Virto'. It features a large Gantt chart visualization showing resource allocation over time. Below the chart, there's a blue banner that says 'Check the workload of your employees and utilization of resources'. To the right of the chart, there's a section for the app details, including the name, provider 'VirtoSoftware', a 5-star rating (3 ratings), and a prominent purple 'Request' button. Below the button, it says 'You can request this app. After it is approved by your SharePoint admin, you can use it on your sites.'

If you see the **“Purchase”** button, click it and skip the step described below.

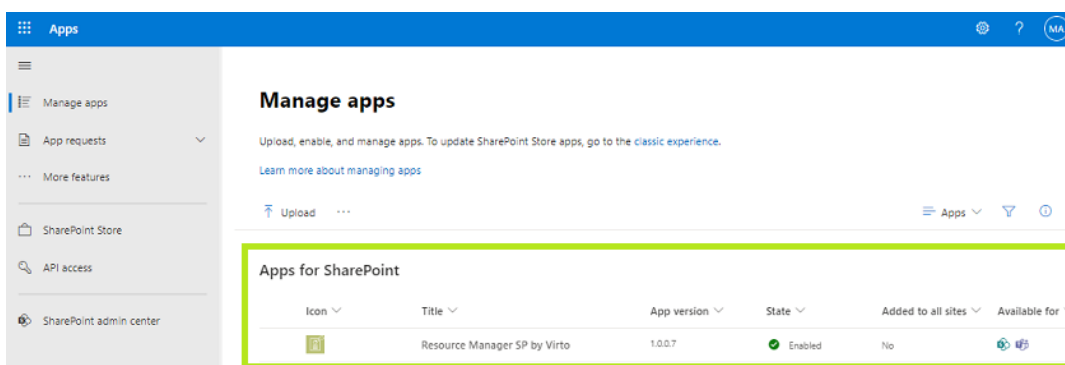
And in case you see the **“Request”** button, click it, and refer to your SharePoint administrator. The SP admin should go to **SharePoint Admin Center (Apps – Admin)** or type <https://admin.microsoft.com> and find **More features — Apps**.



And in the App catalog under **Pending** apps find the Resource Manager App and approve it.

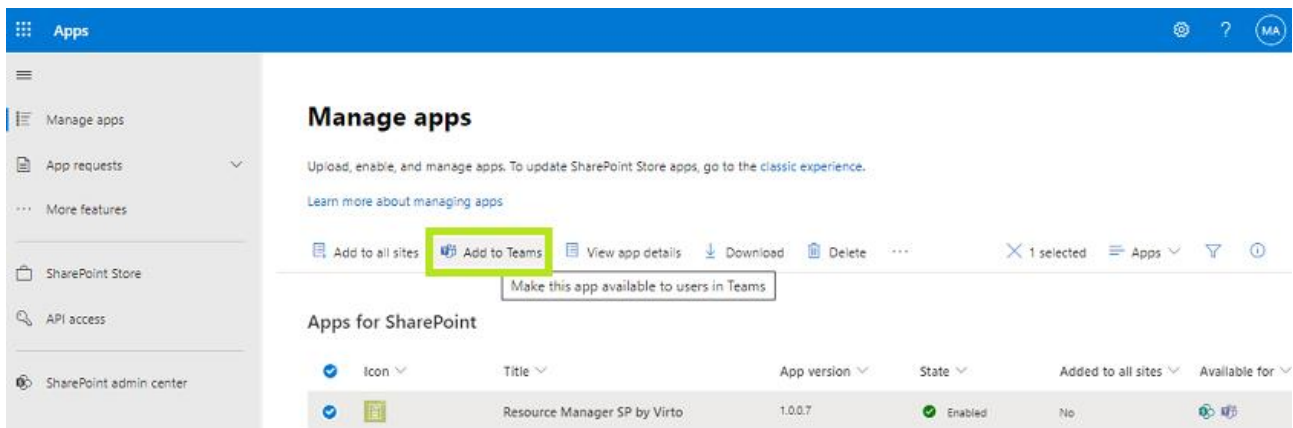


Check the app approved in the Apps catalog available for SharePoint and Teams.

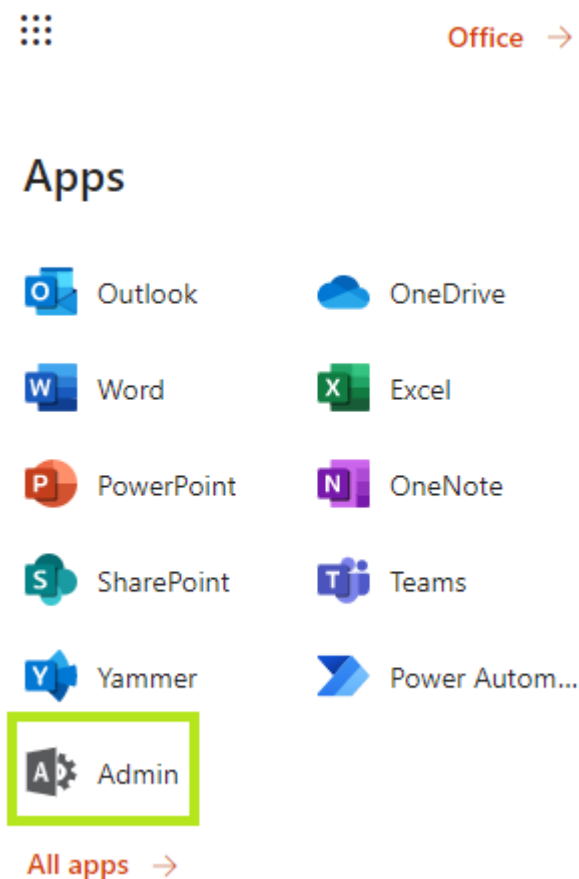


## How to Add Resource Manager to Teams

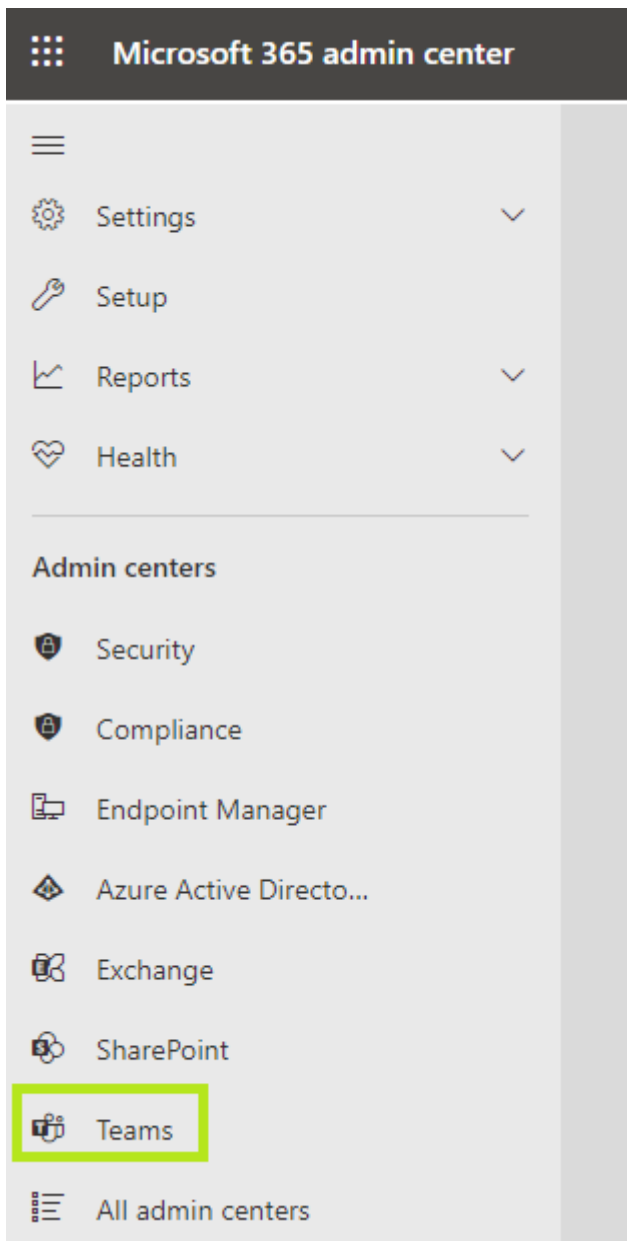
Select the app and click **Add to Teams**.



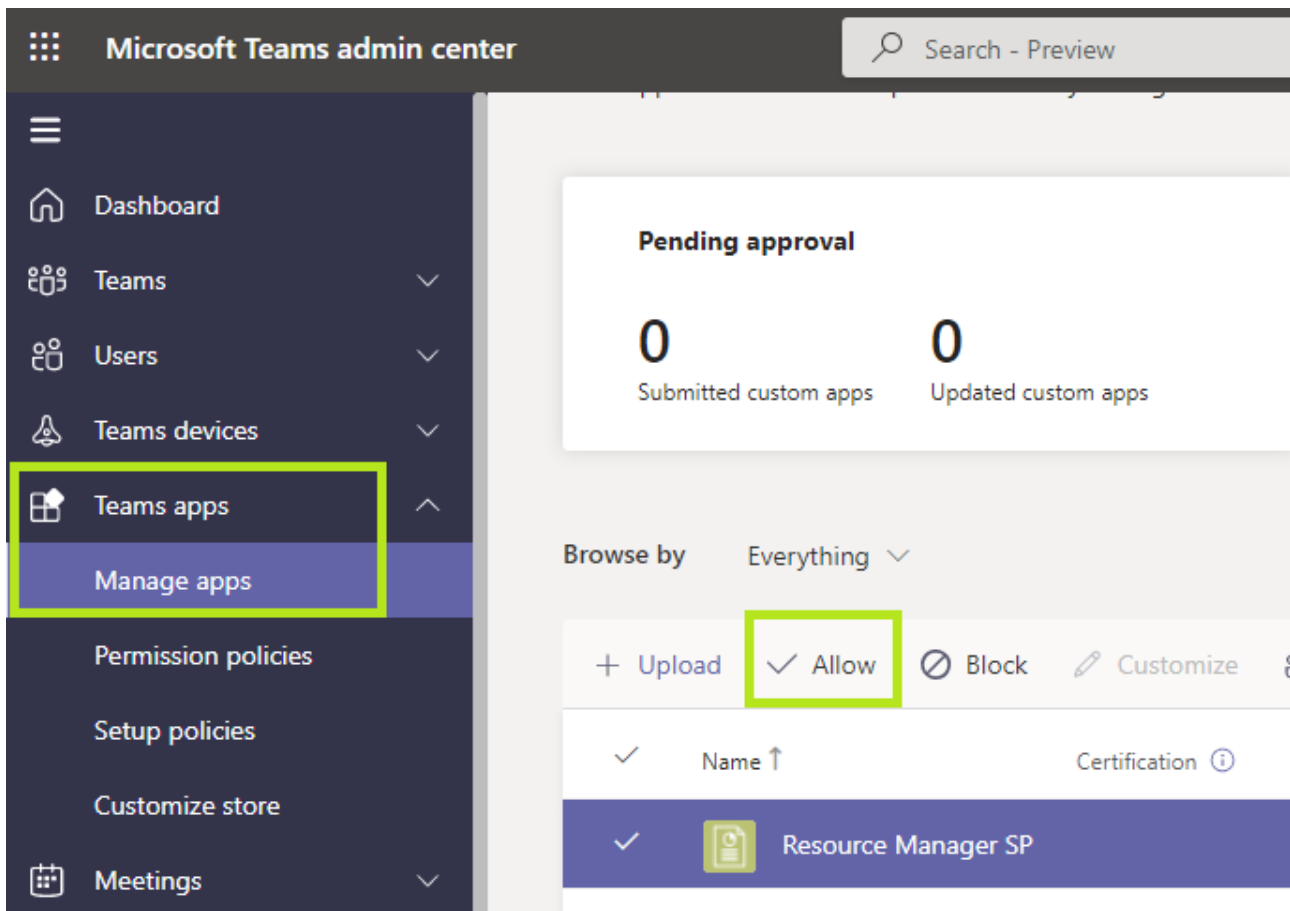
On the next step, please go to SharePoint Admin Center Teams (**Apps — Admin**).



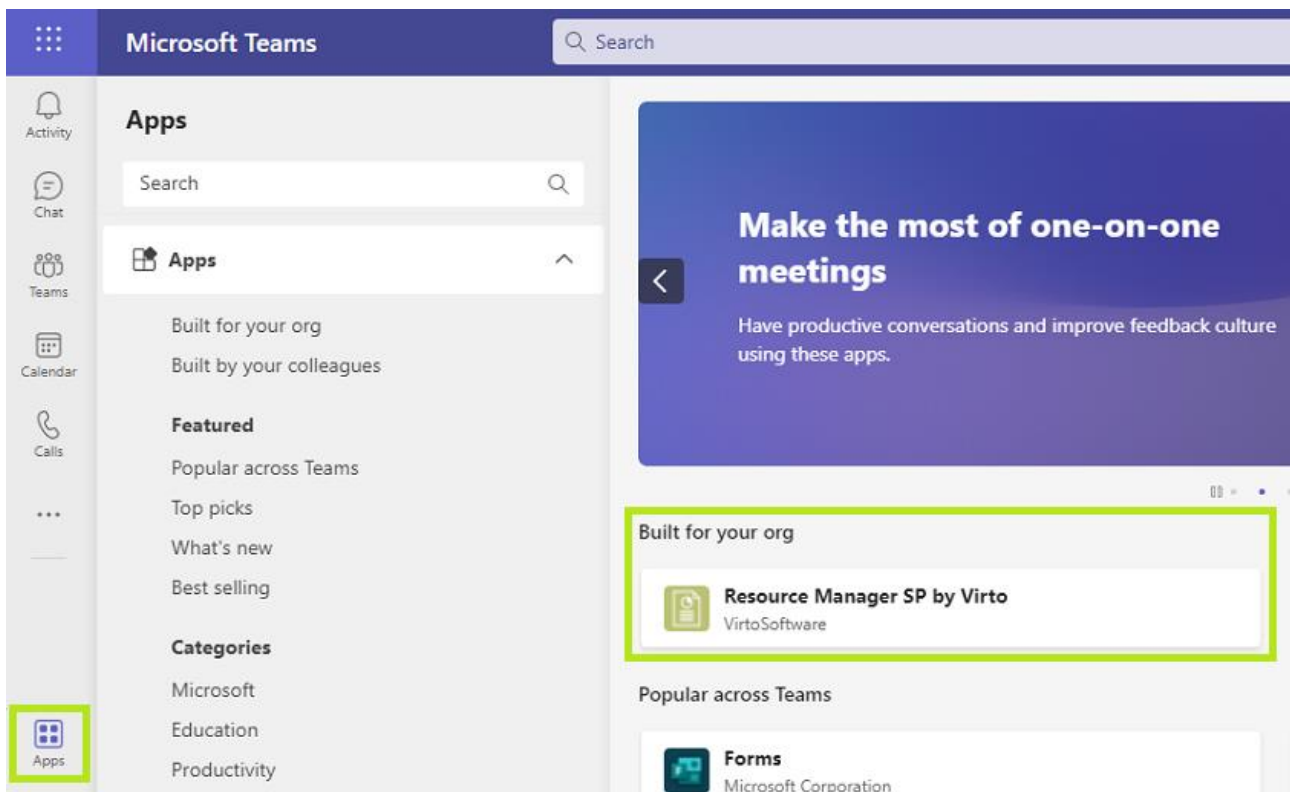
Now find the **Teams** admin center. Make sure you have Teams administrator permission.



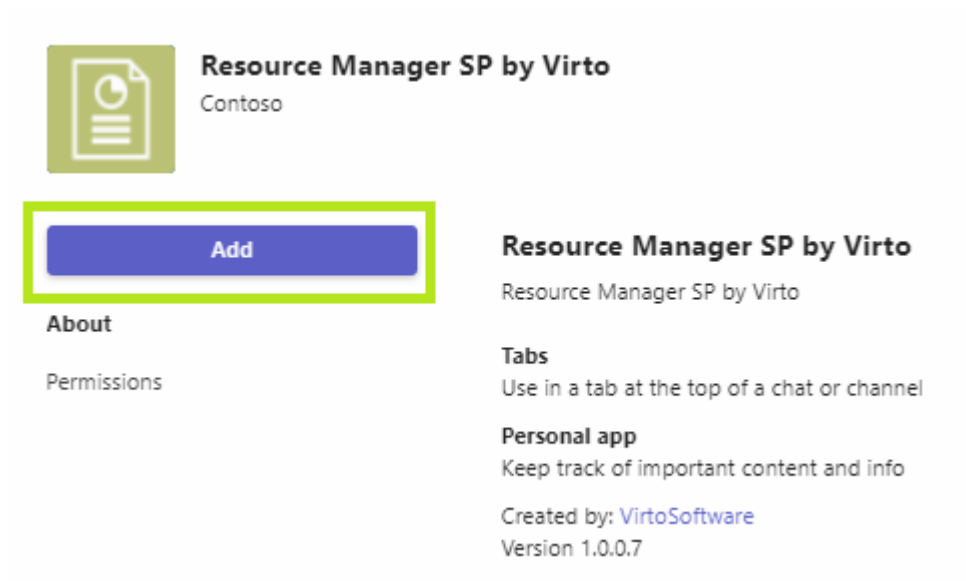
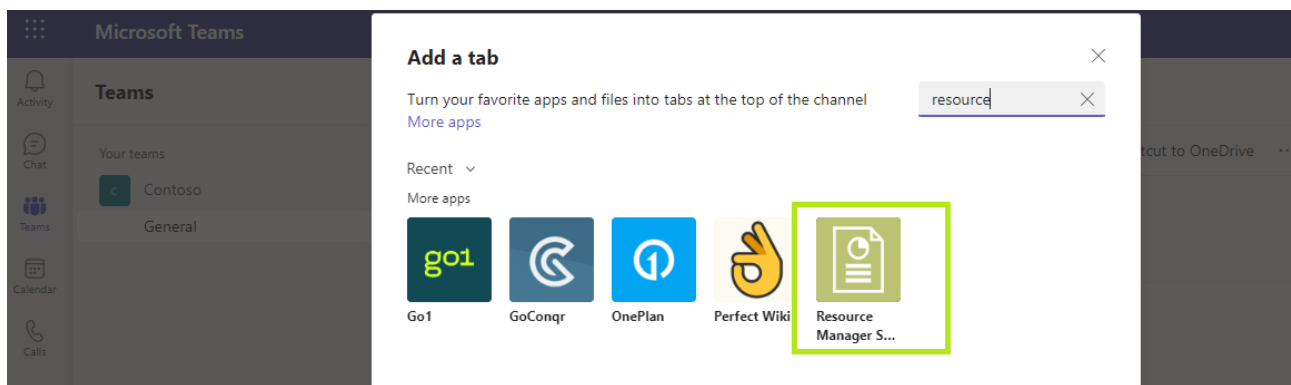
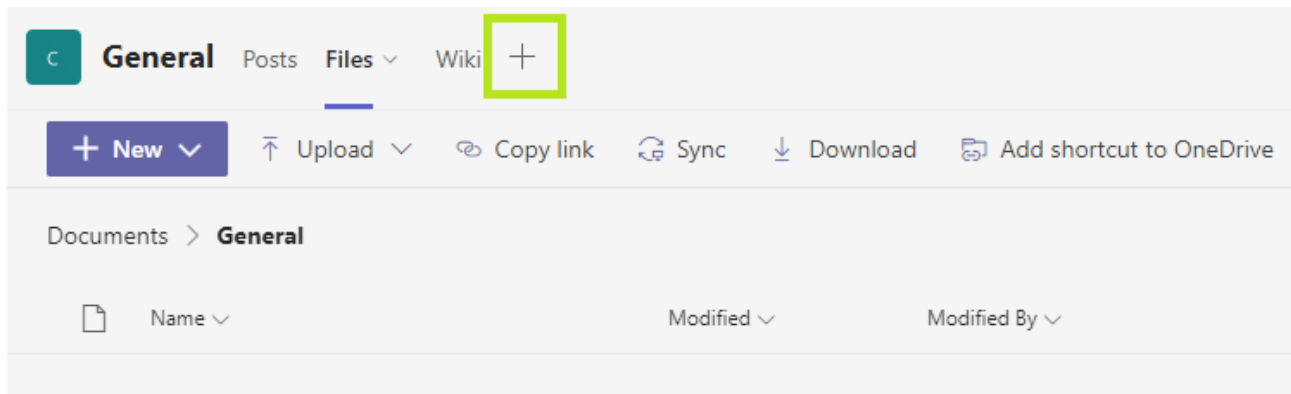
In the Teams Admin center, find **Teams Apps — Manage Apps** and find the Resource Manager App approved by the SharePoint administrator. Allow it.



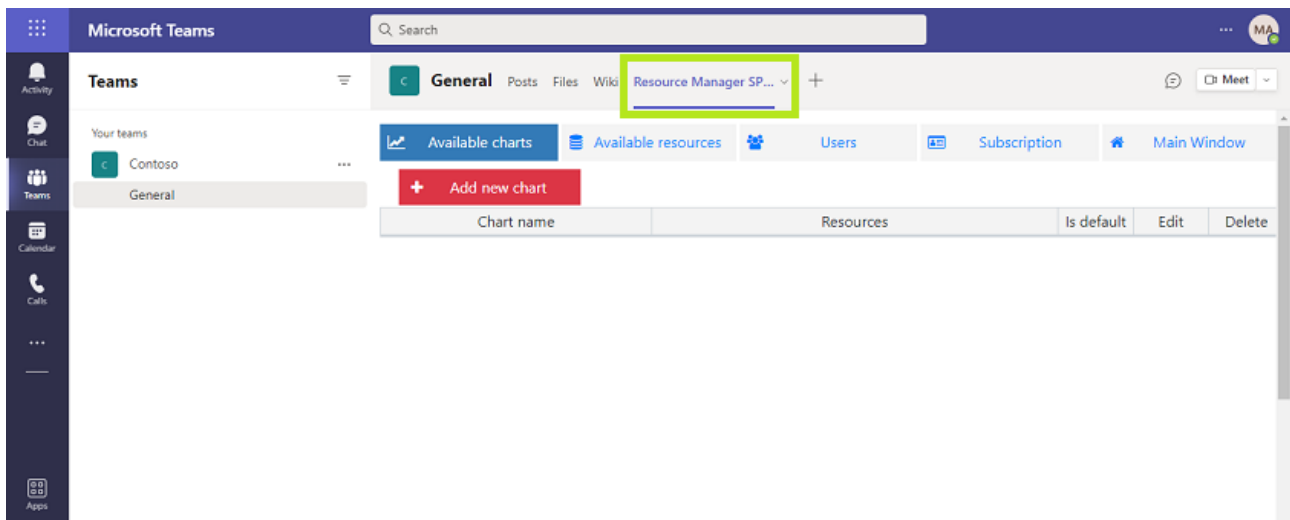
Click on the app name and click **Allow**. Now when Teams users of your organization go to Apps they can see the Resource Manager App in the list of available apps.



For example, now you can add Resource Manager as a separate tab to a chosen Teams channel and use the full-featured app without switching between Teams and SharePoint.

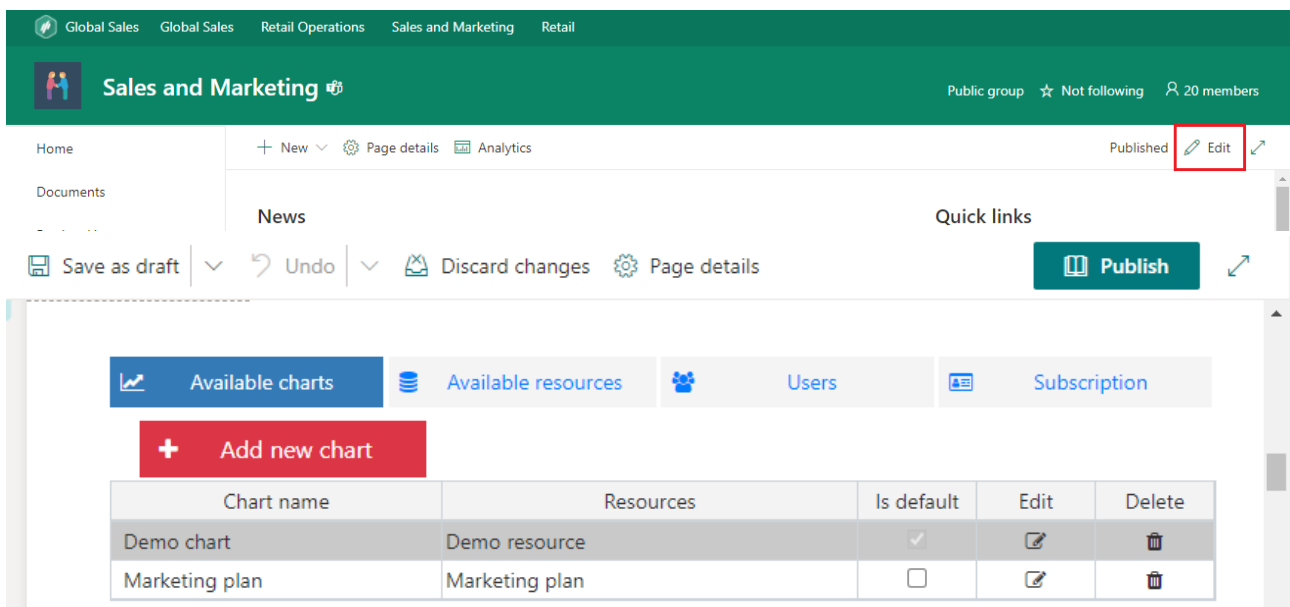


The Resource Manager App now is available as a separate tab of a chosen Teams channel.



## Virto Resource Manager Settings

To see the app settings, switch again to the edit page mode.



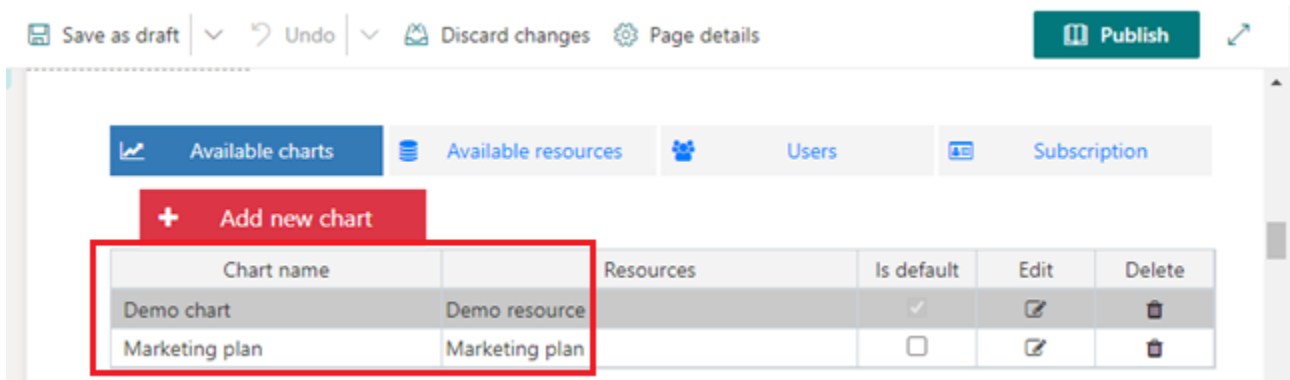
You will see four tabs with the app settings:

- Available charts;
- Available resources;
- Users;
- Subscription.

### Available charts: how to create a new chart

Switch to the “**Available charts**” tab to add a new chart. If you already have charts tuned on the current SharePoint site, you will see the list of existing charts.

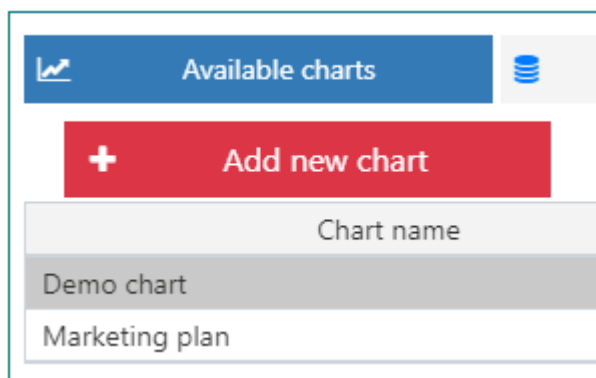




If “**Is default**” checkbox is chosen, the selected chart will be displayed on app site pages without selected chart ID. It will open after a click on the app icon on the Site Contents page.

Chart name	Resources	Is default	Edit
Demo chart	Demo resource	<input checked="" type="checkbox"/>	
Marketing plan	Marketing plan	<input type="checkbox"/>	

Click “Add new chart”.



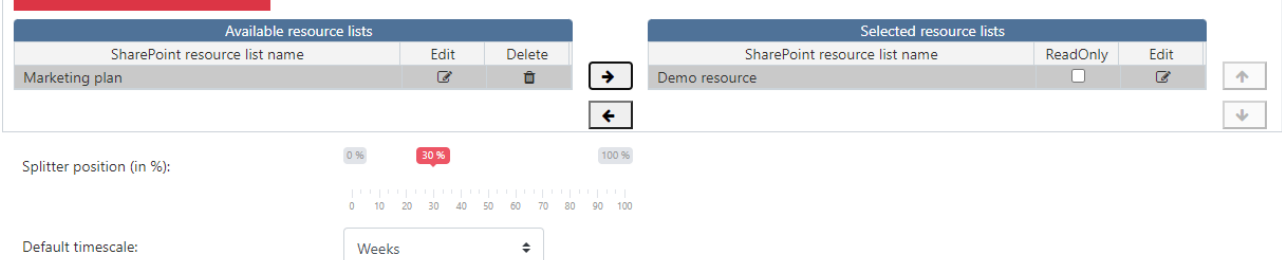
Type the name of new chart. Then add one or more resource lists to be displayed in this chart. Choose the list and then click arrow to add it to the chart.

### Create chart

Resource Manager chart name:\*

Contoso project tasks


+ Add SharePoint resource list





You can also create a new resource. Click “Add SharePoint resource list” and follow the instructions in the “[Available resources: how to add a new resource](#)” section.

**Note:** It is impossible to save a chart without any resources included.

You can edit and delete resources from the chart depending on what data you need to show. It is also possible to apply **Read-Only permission** for the chart. for users. If the chart has “ReadOnly” only permission, the “Add new task” button will be not available for other users.

Selected resource lists		
SharePoint resource list name	ReadOnly	Edit
Demo resource	<input checked="" type="checkbox"/>	

Then you have to define a default **splitter position** for this chart. The splitter divides the chart into two parts: the table on the left and the diagram on the right. You can always change this proportion for chart view with a drag-and-drop feature.

Available resource lists		
SharePoint resource list name	Edit	Delete
Marketing plan		

Selected resource lists		
SharePoint resource list name		
Demo resource		

Splitter position (in %):

0 %

30 %

100 %

0

10

20

30

40

50

60

70

80

90

100

Choose a **default timescale** for the chart. The following options are available:

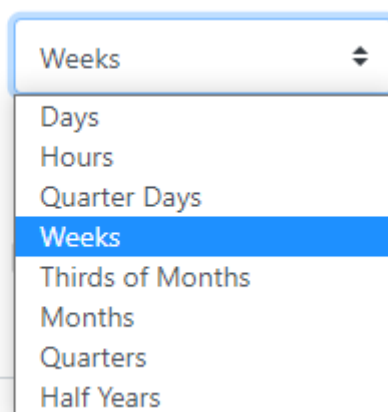
- Days;
- Hours;
- Quarter Days;
- Weeks;
- Thirds of Months
- Months
- Quarters
- Half Years.

Default timescale:

Startday of week:

Setting.CollapseResources:

Setting.ColorsOfNumberCollision



Choose the **start day of the week** (Sunday or Monday).

Startday of week:

A dropdown menu with a light blue border. The selected option is 'Monday' in white text on a blue background. Below it, 'Sunday' is visible in black text on a white background. A small downward arrow is on the right side of the menu.

If you choose the “**Collapse resource lines by default**” checkbox, the chart view will contain the resources with collapsed appointment lines to save the space on the page. In this case, just click on the resources to show the full information.

Collapse resource lines by default:



Colors for tasks intersection cells

You can specify colors for appointment intersections — a color scheme on the chart timeline, which helps to distinguish the number of tasks overlay. Choose colors for these cells.

Colors for tasks intersection cells

No intersections

2

3

4

5

6

7

8

9

10 and more

#FFFF99

#FFCC99

#FF9933

#FF9999

#FF3333

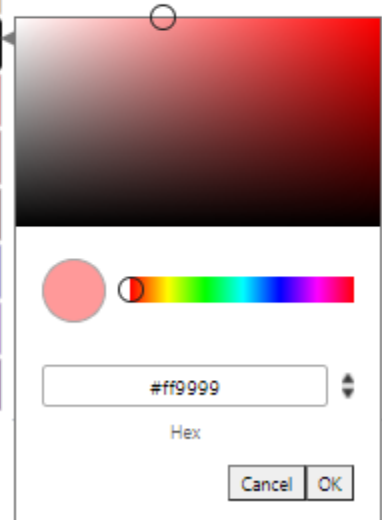
#BF2E2E

#6E1010

#5C33CC

#A232CF

#660066



You can set **permissions** for the new chart (Read Only and Edit) and apply them to the chosen users or user groups.

**Note:** all users with Edit permission have Read permission as well.

List of users or groups for read access:

Adele Vance x

List of users or groups for

List of users or groups for edit access:

Christie Cline x

List of users or groups for

Click "Save" to complete adding of the new chart.

8	#5C33CC
9	#A232CF
10 Setting.AndMore	#660066

List of users or groups for read access: Adele Vance x List of users or groups for

List of users or groups for edit access: Christie Cline x List of users or groups for

✓ Save ✕ Cancel

Now you can see the new added chart in the dropdown list. When you have more than one chart in the app, you can switch between them. Just choose the required chart in the dropdown.

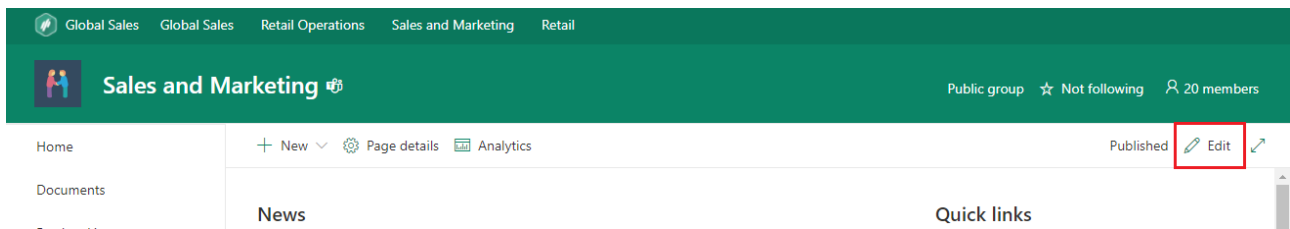
Demo chart

Demo chart
Marketing plan

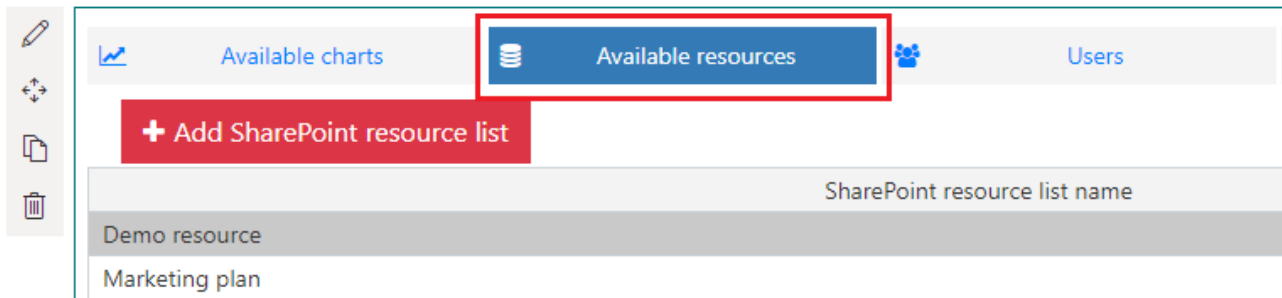
Q				October 18, 2021												February 18, 2022											
				January 2022						February 2022																	
				7 Dec	3 Jan	10 Jan	17 Jan	24 Jan	31 Jan	7 Feb	14 Feb	21 Feb															
⌵ (3) Adele Vance				Documentation												2 Appoi... 3 App... 2.Doc											
Documentation																											
Prepare the ABC contract																											
Month report																											
⌵ (3) Alex Wilber				Search for new software tools																							
Approve new soft																											
Make a demo of the ch...																											
Search for new softwar...																											
⌵ (2) Christie Cline				Prepa... 2 Appoint... Prepar...																							
Review materials																											
Prepare demo																											

## Available resources: how to add a new resource

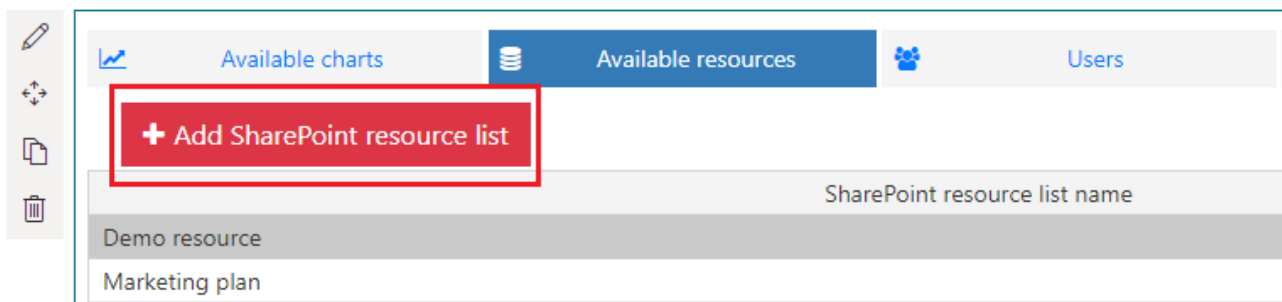
Switch again to the edit page mode.



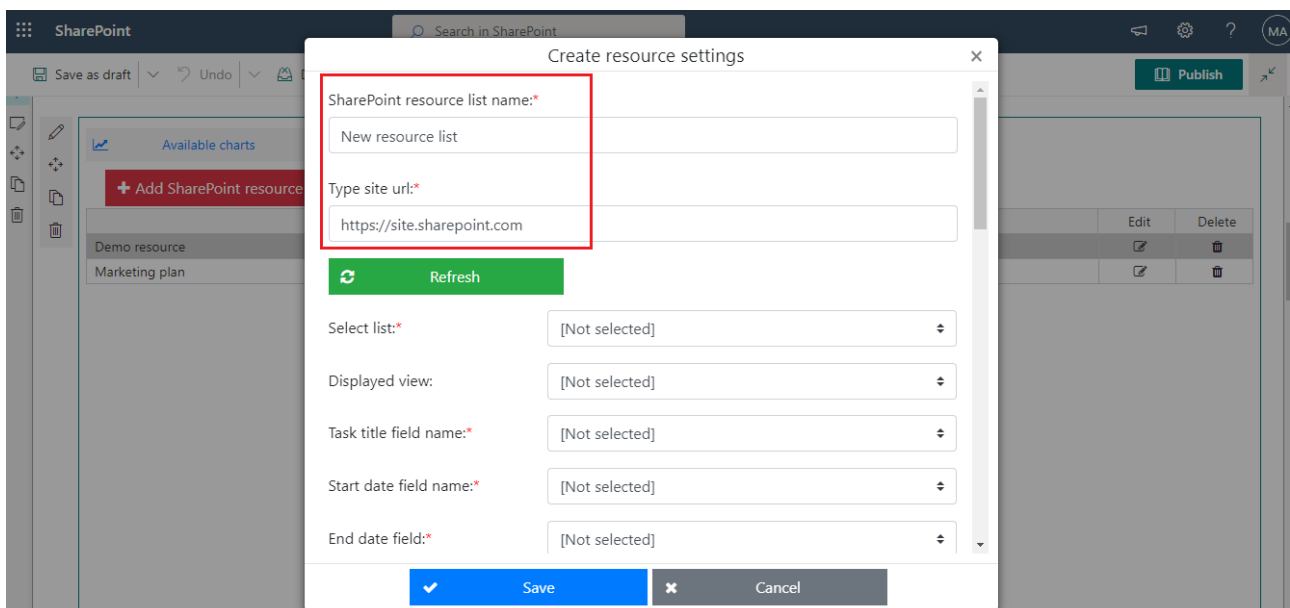
Now open the “**Available resources**” tab. Here is the list of your existing resources, you may add, edit, and delete them. Each resource uses a SharePoint list as data source.



Click “**Add SharePoint resource list**” to add a new resource.



Specify the resource name. Then type URL of the site which contains the SharePoint where you plan to take data from.



**Note:** subsite URL also can be used.

Now chose the required list in the dropdown.

Create resource settings

×

SharePoint resource list name:\*

Type site url:\*

Refresh

Select list:\*  

[Not selected]

[Not selected]

Events

Marketing plan

VirtorUDemo

[Not selected]

Events

Displayed view:

Task title field name:\*

Choose the default view to use when you open this resource in the chart.

Displayed view:

Task title field name:\*

Start date field name:\*

End date field:\*

All Tasks

[Not selected]

All Tasks

Late Tasks

Upcoming

Completed

My Tasks

Gantt Chart

Calendar

Save
 Cancel

Now choose the corresponding fields for the required fields of future resource list: **"Task title"**, **"Start Date"**, **"End Date"**, **"Percent complete"**, and **"Resource"**.

Task title field name:\*

Start date field name:\*

End date field:\*

Percent complete field name:\*

Resource field name:\*

**Available field types:**

- Task name can be a field of the following types: "Text", "LookupMulti", "Lookup".
- Start Date and Due Date fields are fields of the DateTime type.
- Percent complete is a Number field.

**Note:** the ReadOnly fields cannot be used in the resource list of the Resource Manager app. The "RelatedItems", "ModStat", "Attachments", "OutcomeChoice" field types are not available for selection in the Virto Resource Manager.

Then you can define colors for this resource in chart.

Background color for resource rows in the left chart part\*

Task color:

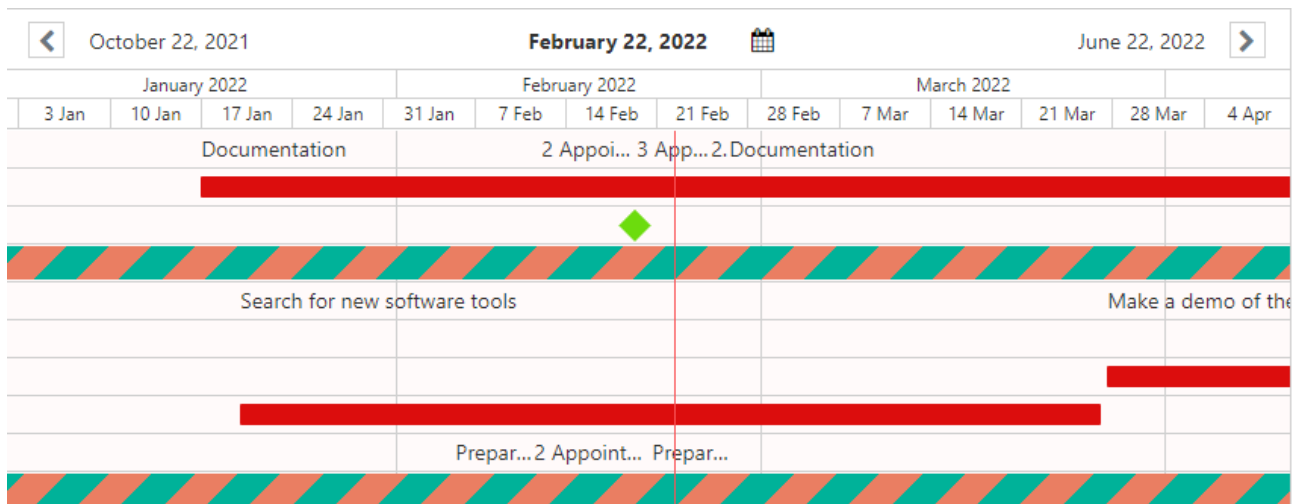
Progress bar color:

Milestone color:

Select fields for left part (table) of Resource Manager chart:

Hex

For example, the color scheme above was applied to the resource in a chart.



Then choose fields to display in the left part of the chart, on the task edit/create form and in the task tooltip. You can change the order of the fields with vertical arrows. This order will be applied to the fields.

Select fields for left part (table) of Resource Manager chart:

Compliance Asset Id  
Priority  
Task Status  
Assigned To  
Description  
Start Date  
Due Date

→  
←

Task Name  
Predecessors  
% Complete

↑  
↓

Fields for task creating/editing form:

Task Name  
Predecessors  
Task Status  
% Complete  
Assigned To  
Kanban Comments  
Points

→  
←

Priority  
Description  
Start Date  
Due Date

↑  
↓

Remember to save to the new resource.



Create resource settings

Select fields for left part (table) of Resource Manager chart:

Compliance Asset Id  
Priority  
Task Status  
Assigned To  
Description  
Start Date  
Due Date

→  
←

Task Name  
Predecessors  
% Complete

↑  
↓

Fields for task creating/editing form:

Task Name  
Predecessors  
Task Status  
% Complete  
Assigned To  
Kanban Comments  
Points

→  
←

Priority  
Description  
Start Date  
Due Date

↑  
↓

The added resource will be displayed at the end of the resources list.

Available charts	Available resources	Users	Subscription
+ Add SharePoint resource list			
Team tasks			
Project A			
Holidays			
Bdays			
Virto resource			

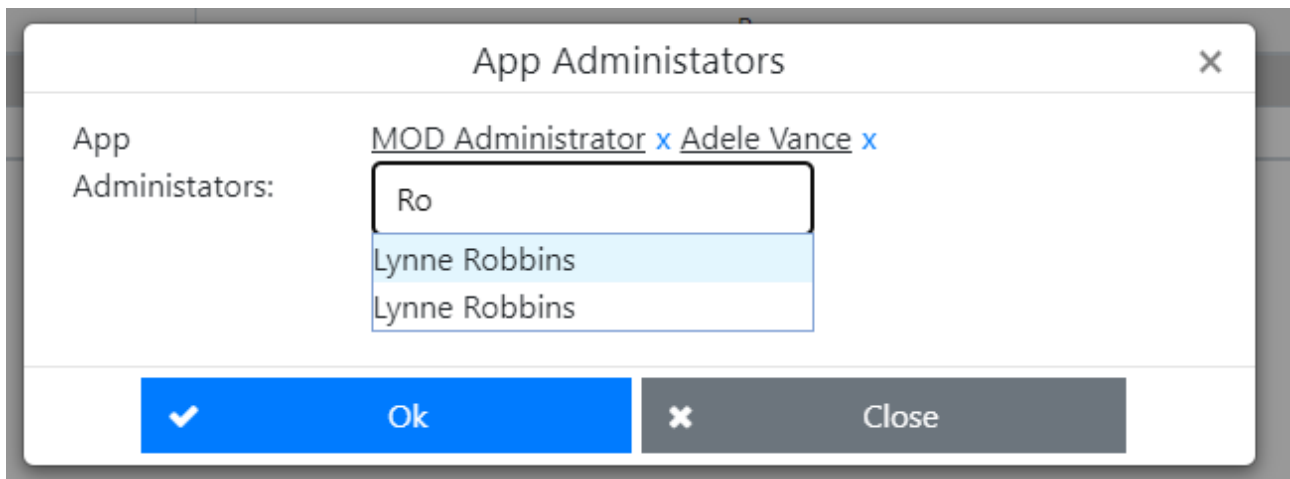
## Users

Switch to the page edit mode and find the “Users” tab. It contains the list of app administrators with full permission.

Available charts	Available resources	Users	Subscription
------------------	---------------------	-------	--------------

The App Administrators have the rights to:

- edit charts and resources (chosen users can manage lists that are available for them according to their access level predefined in SharePoint permissions);
- set default chart;
- edit subscription;
- edit App Administrators list.



The user who added the app receives the App Administrator status for this app automatically. This user can add other administrators.

## Subscription

To check the subscription status, switch to the page edit mode and open the “**Subscription**” tab.

Edition: Trial  
 Status: **Valid**  
 Domain: m365x71580178.sharepoint.com  
 Expires on: 3/10/22  
 Trial license manage

You are using Trial period of Virto SharePoint Resource Manager for Office 365. We hope you enjoy our app. To subscribe for 1 year please select one of the options bellow

Site collection manage Not trial expiration

### Subscribe to Virto ONE Cloud and save up to 77% of separate apps price

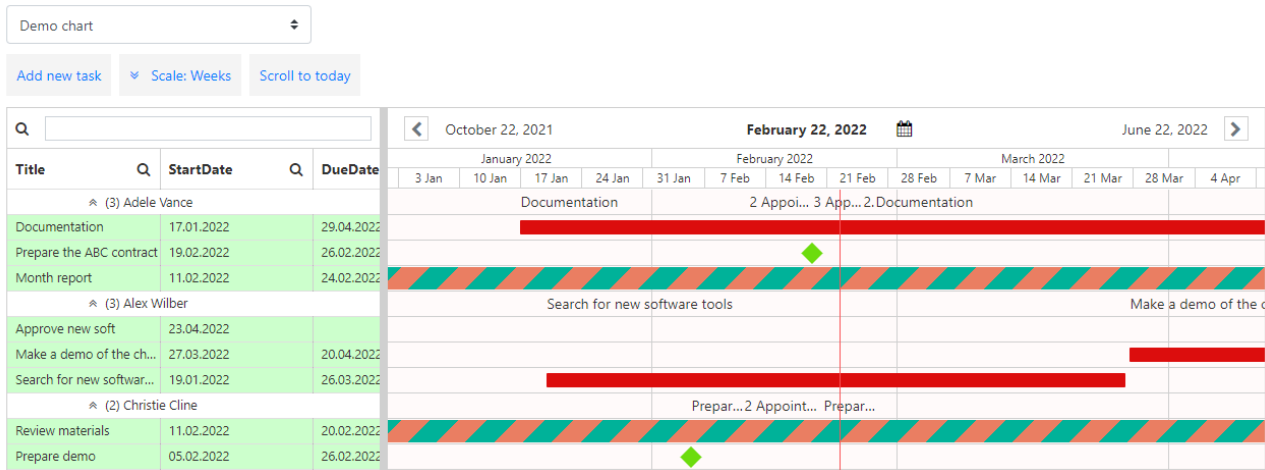
- 50 +

users across my company will use Virto Apps (minimum purchase for Virto One Cloud is 50 users)

Resource Manager	Resource Manager	V1 PRO	V1 Ultimate
<b>\$33.25 site/mo</b> <div style="background-color: #e91e63; color: white; padding: 5px; border-radius: 10px; display: inline-block;">           Buy now for  <b>\$399 / year</b> </div> <i>Unlimited</i>	<b>\$99.92 tenant/mo</b> <div style="background-color: #e91e63; color: white; padding: 5px; border-radius: 10px; display: inline-block;">           Buy now for  <b>\$1,199 / year</b> </div> <i>Unlimited</i>	<b>\$4.13 user/mo</b> <div style="background-color: #e91e63; color: white; padding: 5px; border-radius: 10px; display: inline-block;">           Buy now for  <b>\$2,475 / year</b> </div> <i>You save \$5,201</i>	<b>\$5.00 user/mo</b> <div style="background-color: #e91e63; color: white; padding: 5px; border-radius: 10px; display: inline-block;">           Buy now for  <b>\$3,000 / year</b> </div> <i>You save \$7,773</i>
Virto Office 365 Resource Manager App is created for an effective SharePoint resource management.	Virto Office 365 Resource Manager App is created for an effective SharePoint resource management.	Best for companies that need to increase general productivity and project management in Office 365	Best for companies that need to get maximum flexibility in Office 365  <b>Apps included:</b>

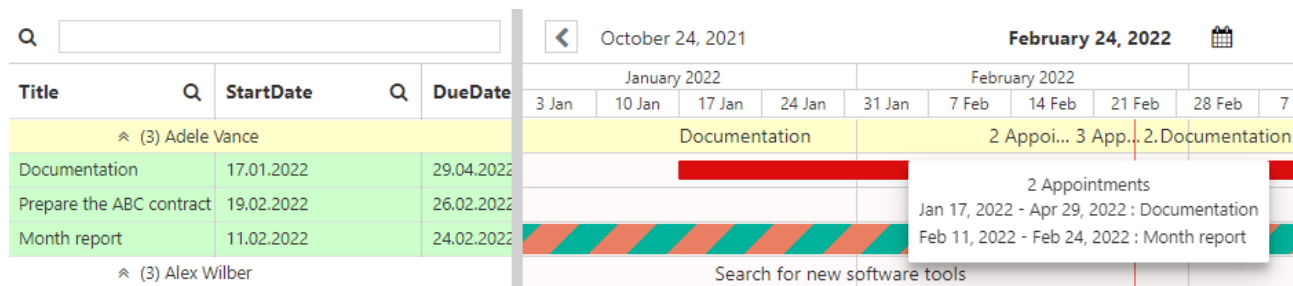
## Using Virto Resource Manager App

When the app is adjusted, it consists of two visual parts.



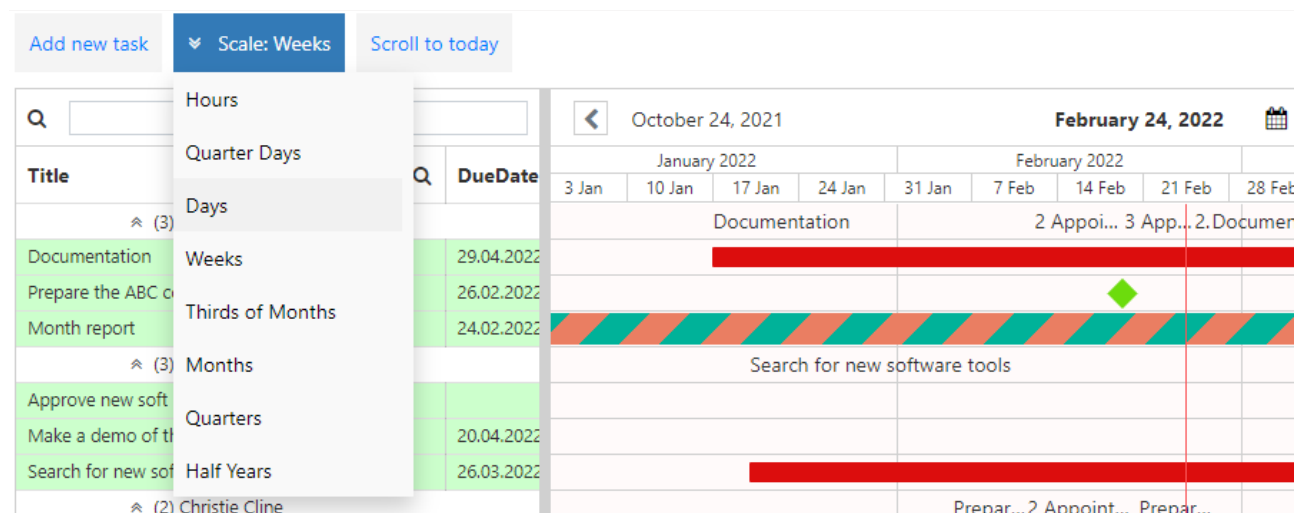
**Note:** See the “Adding App to a SharePoint site” section to specify a chart for each page.

The left part includes the list of resources (users, task names, date and time, etc.). The right part shows the timescale with tasks planned for a single period with chosen colors. The number of tasks assigned to a person for the same period is shown on the chart. The visualized resource utilization helps managers to edit the plan depending on workload. Place the cursor on the number of tasks to see the detailed information in a tooltip.

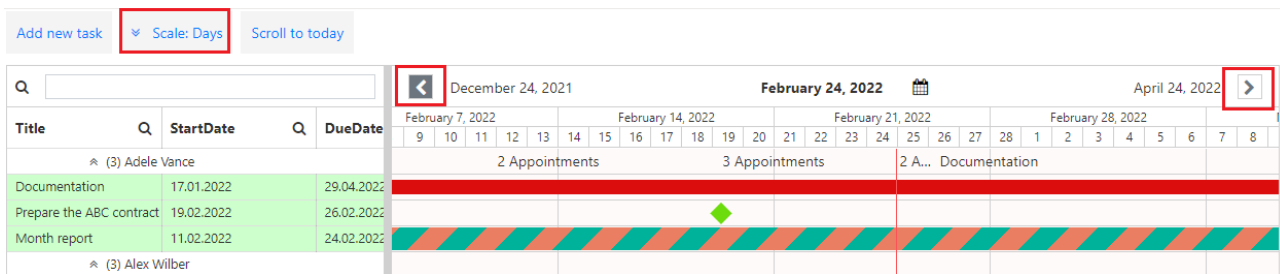


## Timescales

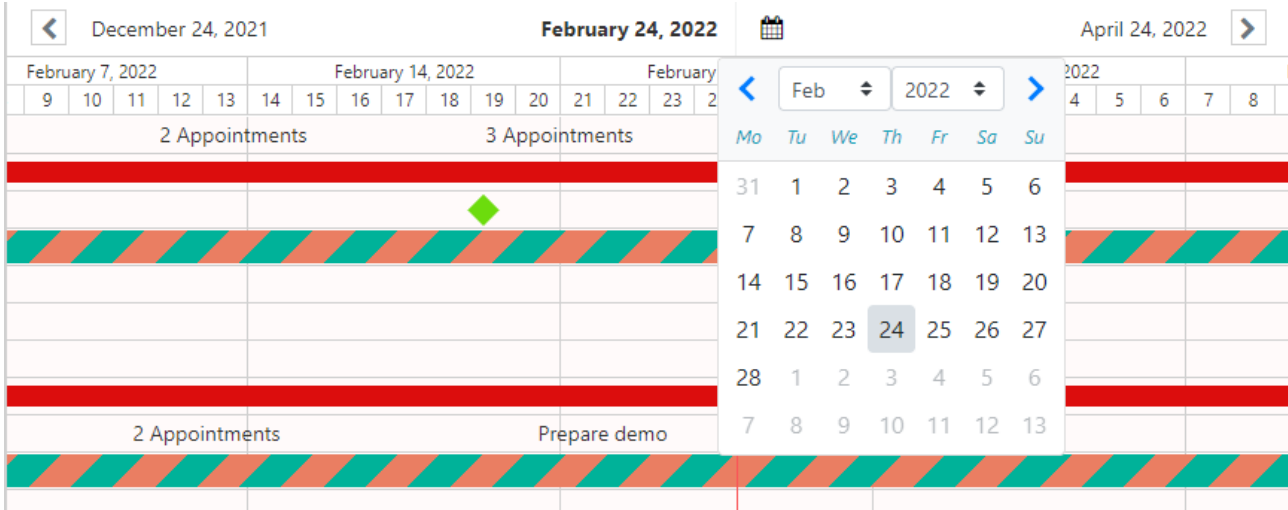
Choose the appropriate timescale using dropdown menu: “Hours”, “Quarter Days”, “Days”, “Weeks”, “Thirds of Months”, “Months”, “Quarters”, “Half Years”.



Use navigation arrows to switch back and forward in the chosen timeline.



Or choose the date in the date picker to see the tasks planned for it.



Virto Resource Manager app supports scrolling with mouse wheel in the Gantt chart, which is equivalent to arrow click on the scrollbar.

## Creating a task

Virto SharePoint Resource Manager allows users to create tasks right in the app. The same changes will be applied in the source SharePoint list.

Click **"Add new task"** button to create a new task.

Demo chart

**Add new task** Scale: Weeks Scroll to today

Q

Title	StartDate	DueDate
⌵ (3) Adele Vance		
Documentation	17.01.2022	29.04.2022
Prepare the ABC contract	19.02.2022	26.02.2022
Month report	11.02.2022	24.02.2022

October 24, 2021

January 2022

3 Jan 10 Jan 17 Jan

Document

**Note:** If you apply "ReadOnly" permission to a chart, the "Add new task" button is hidden.

Create task

Title: Prepare the roadmap

Start Date: 24/02/2022

Due Date: 03/03/2022

% Complete: % Complete

Assigned To: Adele Vance x

Save Cancel

Specify the task name and fill in the fields of the edit form (you can select these fields in the Resource settings). New task will appear in the chart.

Q

Title	StartDate	DueDate
⌵ (4) Adele Vance		
Prepare the roadmap	24.02.2022	03.03.2022
Documentation	17.01.2022	29.04.2022
Prepare the ABC contract	19.02.2022	26.02.2022
Month report	11.02.2022	24.02.2022

October 24, 2021

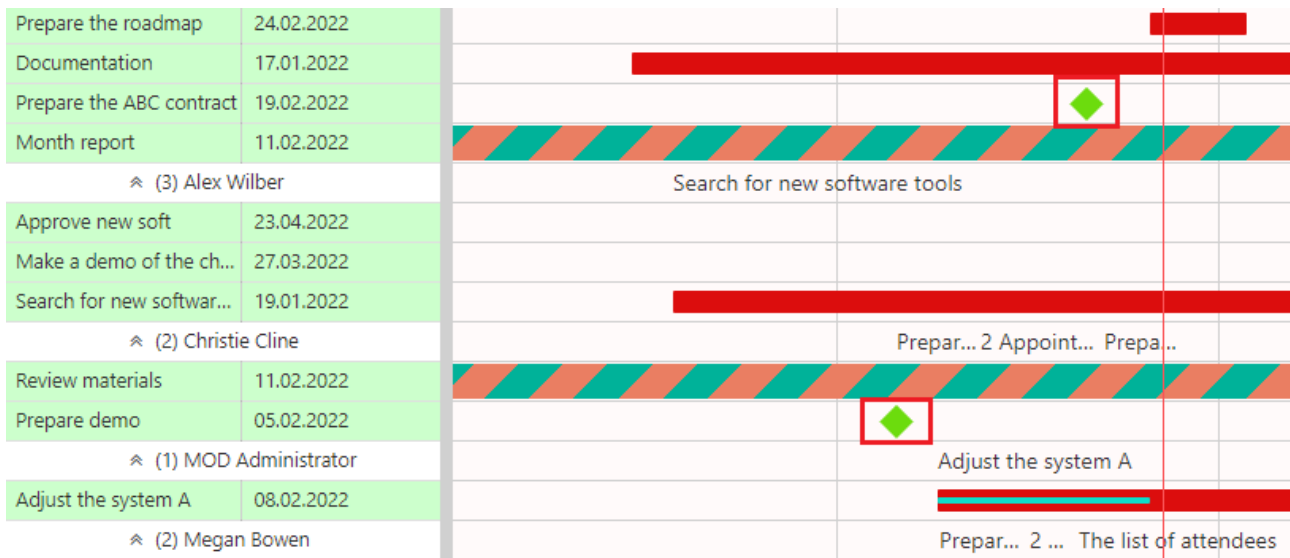
February 24, 2022

January 2022 February 2022 March 2022

3 Jan 10 Jan 17 Jan 24 Jan 31 Jan 7 Feb 14 Feb 21 Feb 28 Feb 7 Mar 14 Mar

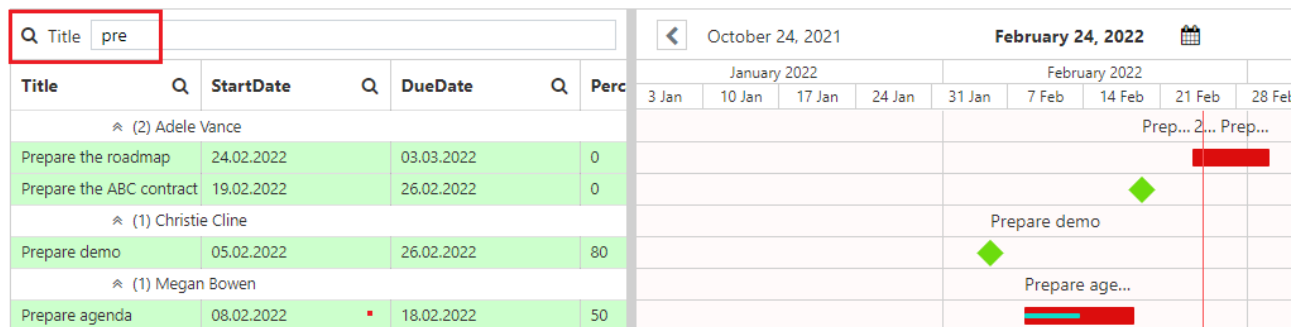
Documentation 2 Appoi... 3 Ap... 43.2 Ap... Documentation

Virto SharePoint Resource Manager for Office 365 allows users to create **milestones** - tasks with zero duration or with the same start and end dates. Just create new task as described in previous section and define equal start and end date and time.

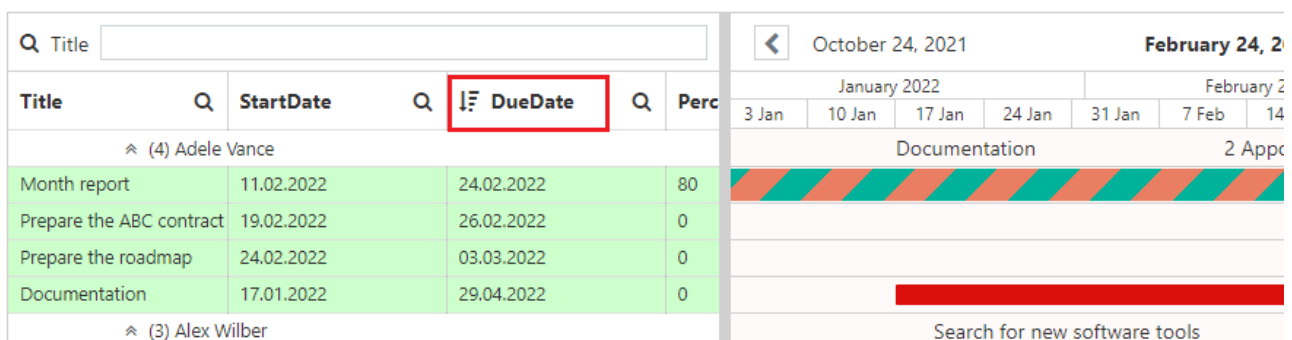


## Task filters and sorting options

You can use the filter bar to show only tasks according to your request.

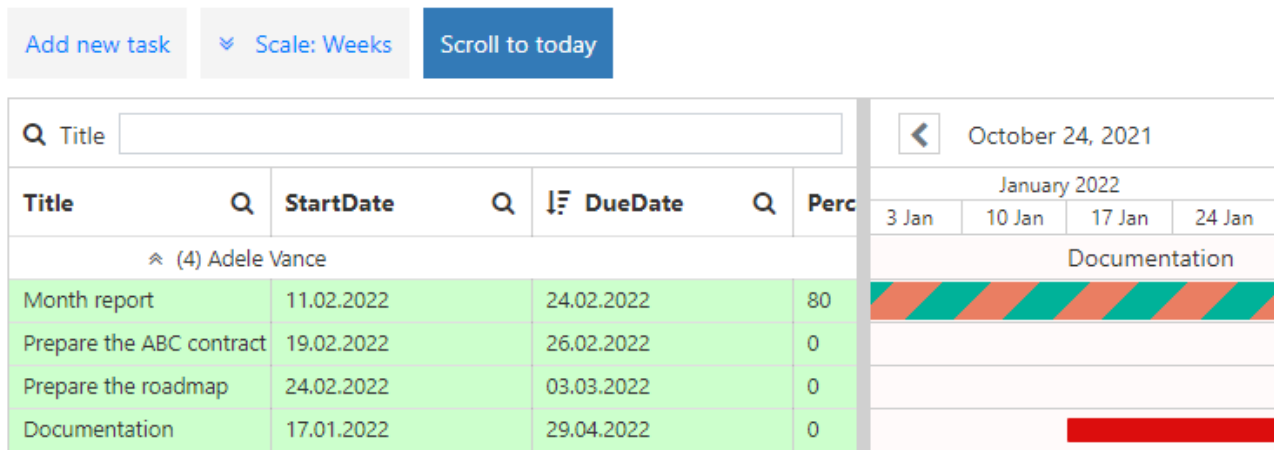


You may sort tasks in ascending and descending order. Clicking on a column in the left part of chart which you wish to sort. For example, sort tasks by the due date.



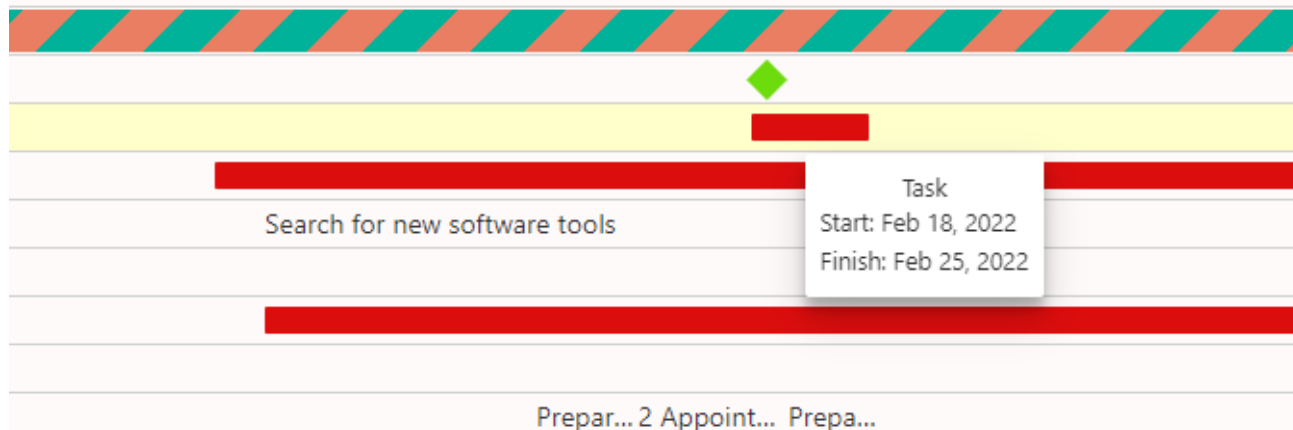
## Scroll to Today

If you need to scroll chat view to the current date, simply click "Scroll to today".



## Moving tasks

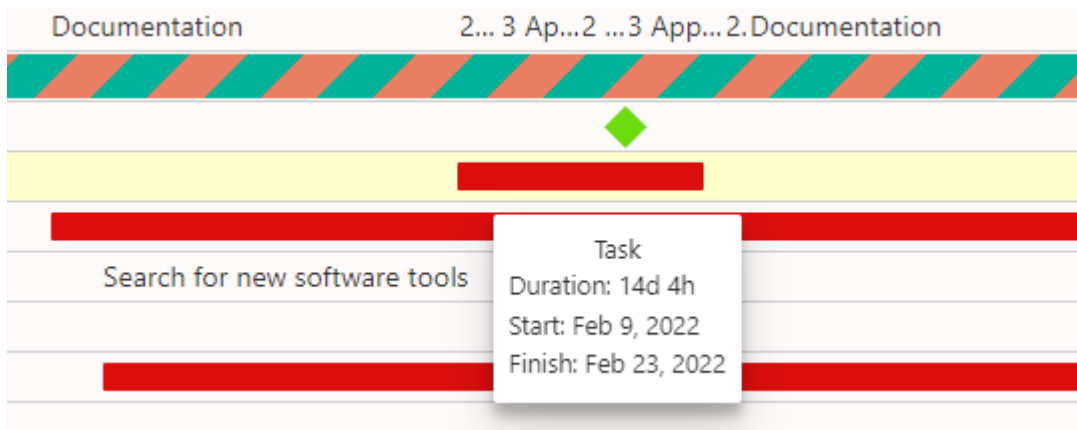
You can change task start date and end date right on the chart by simple moving. Drag and drop tasks to appropriate dates.



Start and end dates of the task will be changed. The same changes will be applied in the source SharePoint list.

## Changing Task Duration

With Virto Resource Manager users can change task duration with drag and drop feature. Just drag start or end of a task to a required date and drop it.



End date will be changed. The same changes will be applied in a source SharePoint list.

## Changing Percent Complete

If percent complete field is added (please, check the data source settings), you can easily change percent complete right in the chart. Just drag and drop the percentage to required value.

