VIRTO SOFTWARE

Virto SharePoint Gantt Chart Web Part for SharePoint 2013, 2016 and 2019

Release 4.7

User and Installation Guide

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Virto Gantt Web Part
for Microsoft SharePoint 2013, 2016 and 2019

Overview

Virto Gantt Web Part is intended to view list items in a Gantt chart to see a graphical representation of how a team's tasks relate over time in **Microsoft SharePoint**.

Features List

Feature	Version
View list items in a Gantt chart	v.4.0
Using SharePoint list as a data source	v.4.0
Display several lists in one Gantt chart	v.4.0
Creating new tasks/milestones right in the Gantt chart	v.4.0
Applying different timescales to view items	v.4.0
Scrolling Gantt chart to required period of time	v.4.0
Scrolling to current day tasks	v.4.0
Creating child tasks for selected tasks	v.4.0
Changing task duration with drag and drop	v.4.0
Adding task resources.	v.4.0
Ability to define read-only settings	v.4.0
Ability to define colors for tasks/summary tasks/milestones/percent complete.	v.4.0
Export to PDF	v.4.6.0
Filtering tasks by dates	v.4.7.0

System/Developer Requirements

SharePoint version: 2013

Operation system: Windows Server 2012 Standard or Datacenter X64 / 2008 R2 SP1

Server: SharePoint Release: Microsoft SharePoint Foundation 2013 or Microsoft SharePoint Server 2013; Microsoft .NET Framework 4.5

Browser: Internet Explorer 8 or greater is recommended for Advanced Administration features, Mozilla, Firefox, Google Chrome supported

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SharePoint version: 2016

Operation system: 64-bit edition of Windows Server 2012 R2 Service Pack 1 AND 64-bit edition of Microsoft SQL Server 2014 Service Pack 1 (SP1)

Server: SharePoint Server 2016, Microsoft .NET Framework 4.5.2

Browser: Microsoft Internet Explorer 10 or higher, Google Chrome, Firefox, Mozilla

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Installation and Usage

This section describes how to install, upgrade, uninstall, or contact Support for the Virto Gantt View.

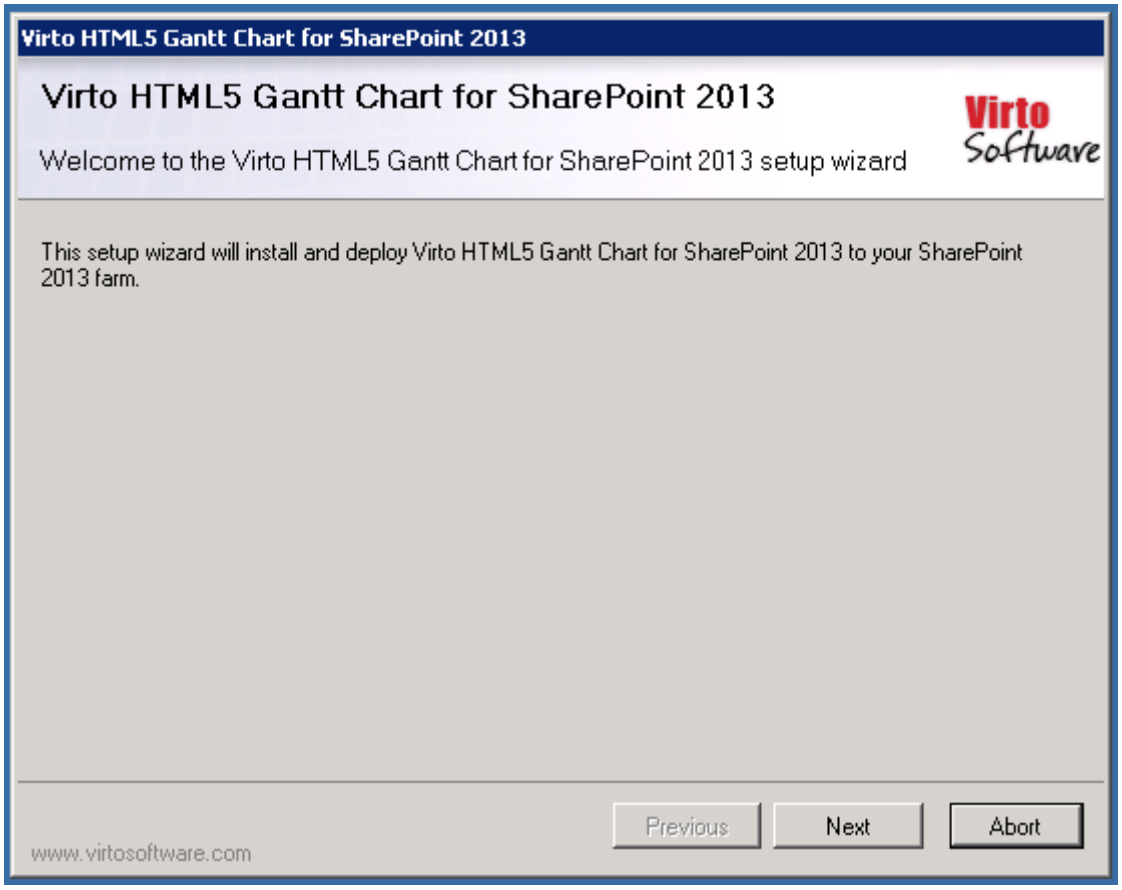
Installing Virto Gantt Web Part

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

Virto Gantt Web Part for SharePoint setup program provides links to the various installation components for the calendar.

To access Virto Gantt View Setup program download **Virto.SharePoint.2019.TaskManager.zip** (or Virto.SharePoint.2016.TaskManager.zip or Virto.SharePoint.2013.TaskManager.zip) file and unzip it. Run extracted **Setup.exe** as administrator under the farm administrator account.

The setup wizard window will appear.



Virto Gantt Web Part wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click “Next”.

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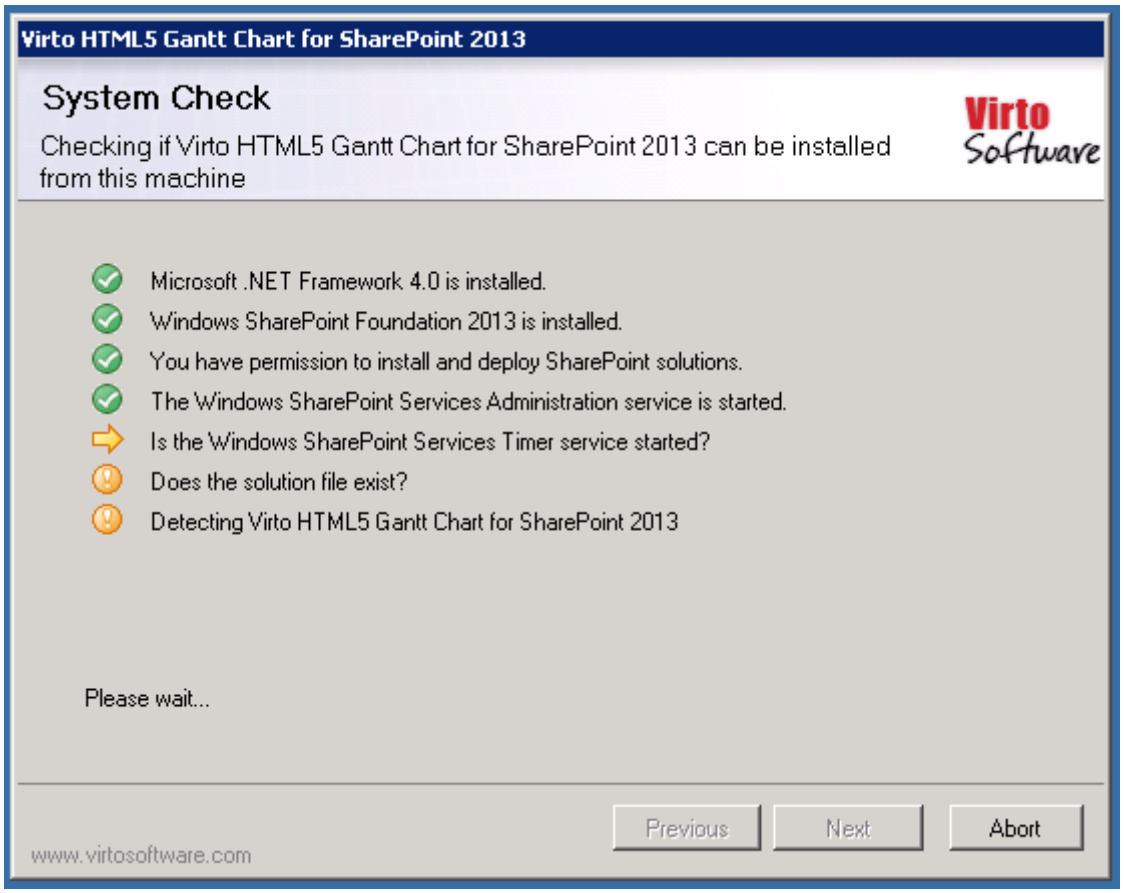
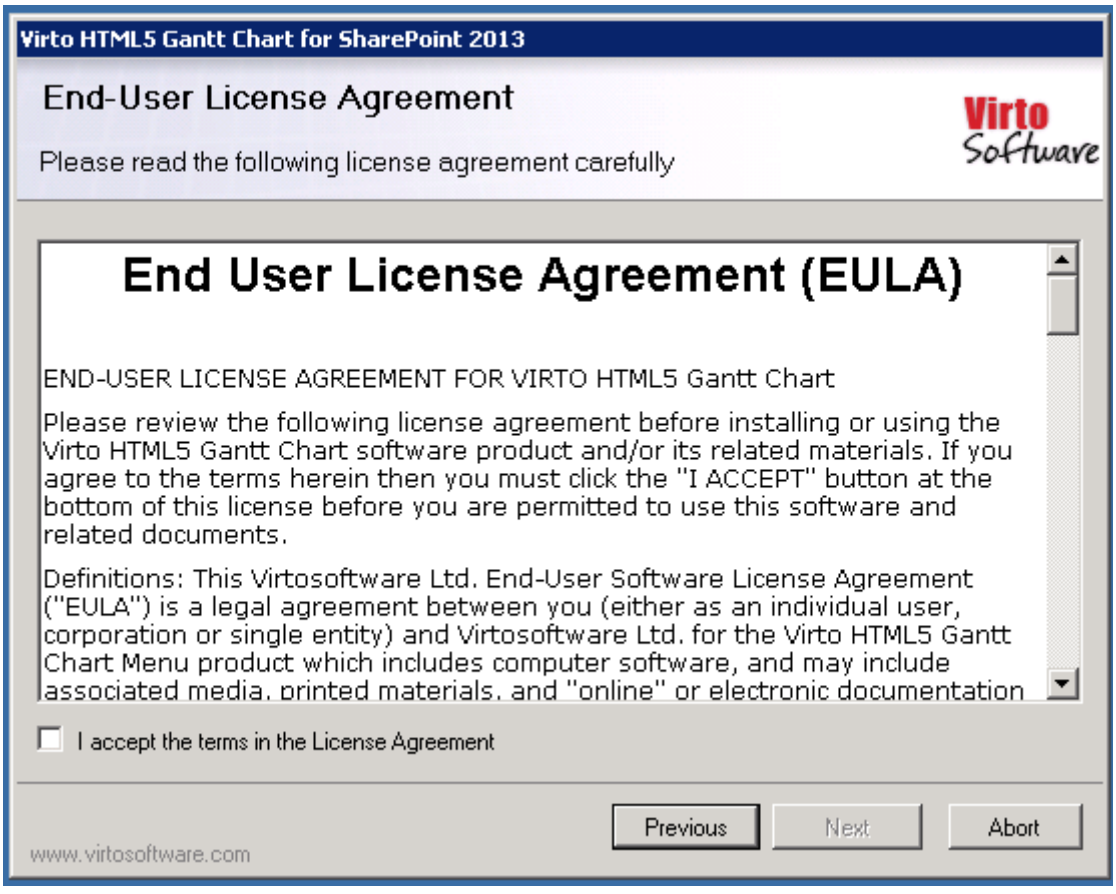


Check “I accept the terms in the License Agreement” and click “Next”.



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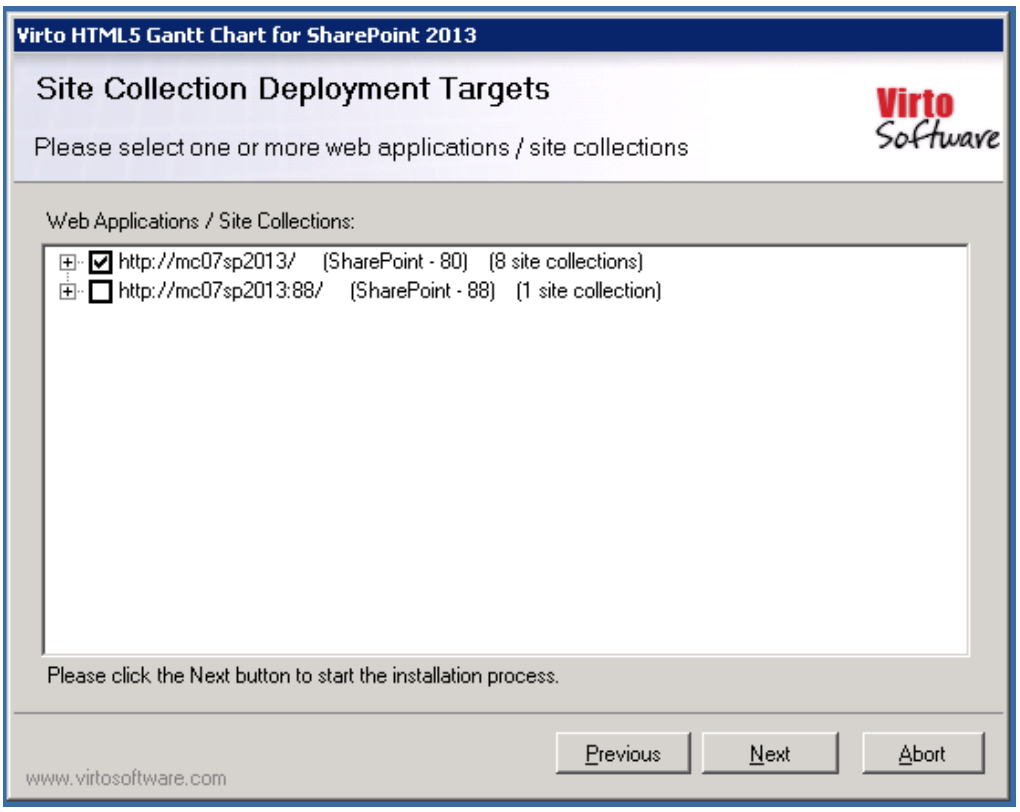
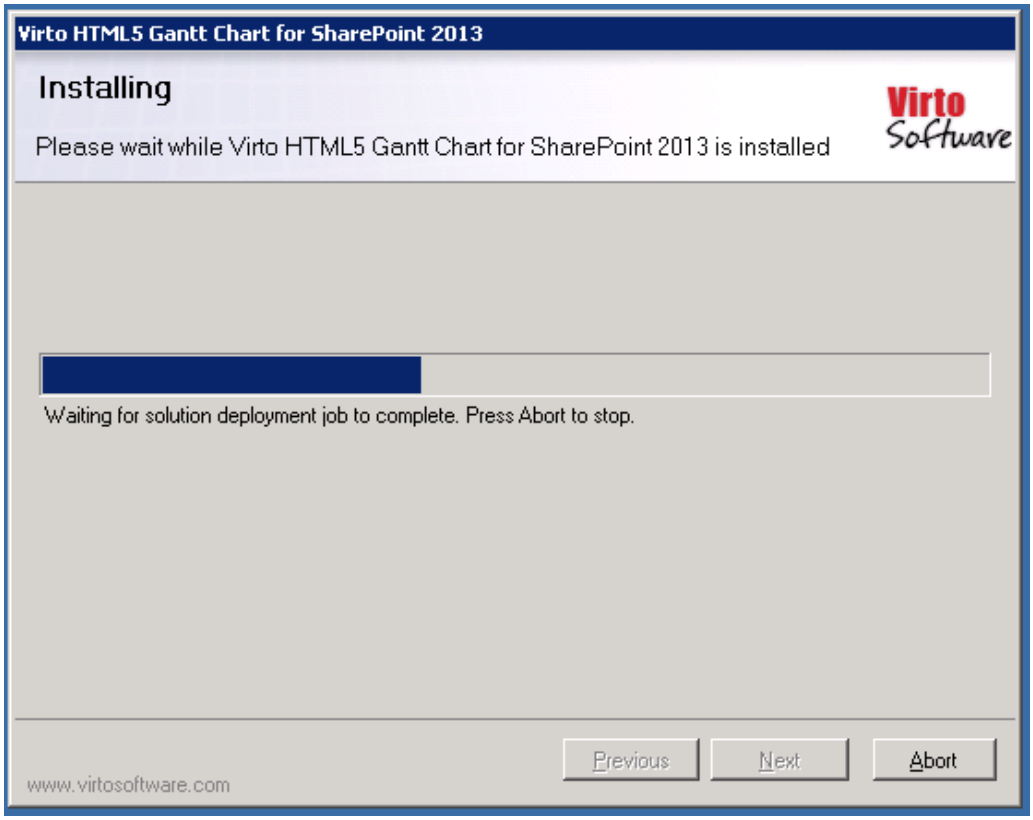
Select the web application(s) where you want to install the product.

Warning: *You must be logged in to the SharePoint server with a Site Collection Administrator account to automatically activate this feature*.



Then click “Next”.



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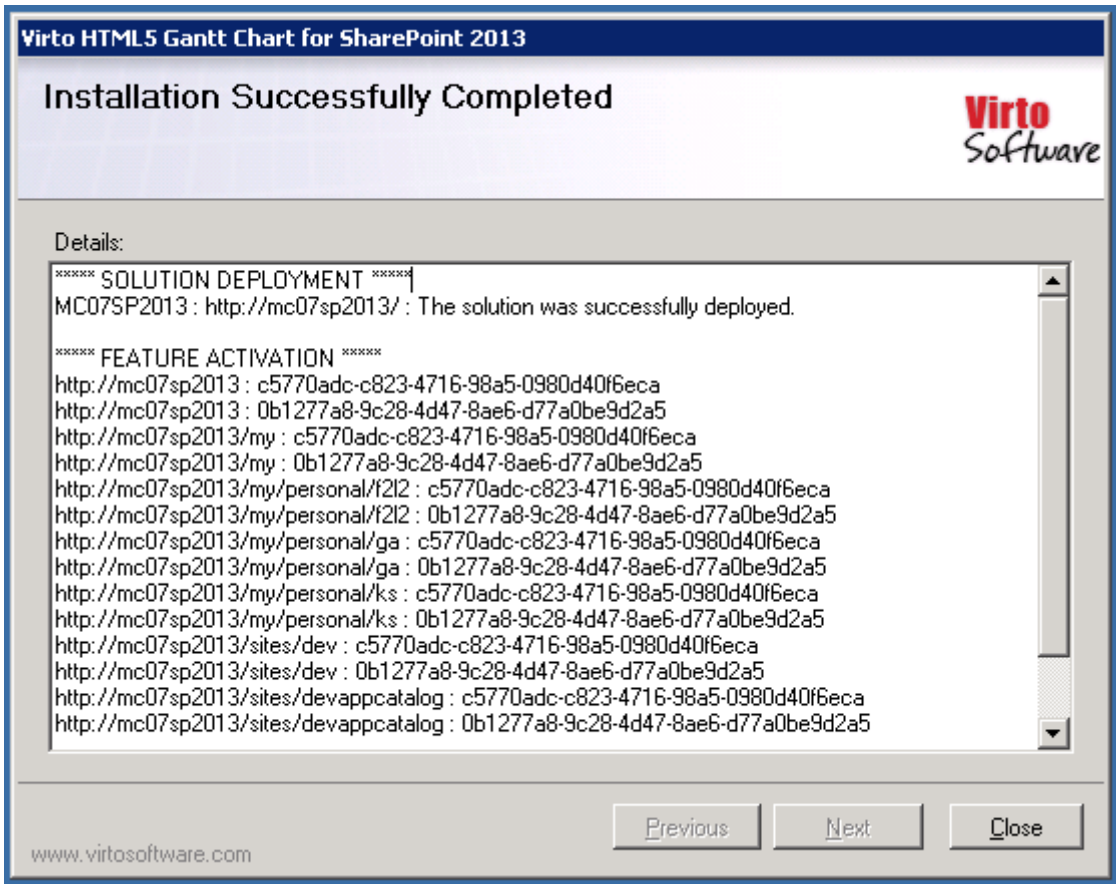
Click “Close” to complete the installation.



Upgrading Virto Gantt Web Part

If you already use Virto Gantt Web Part and need to upgrade it to the latest version, download the.zip file from http://www.virtosoftware.com. Unzip the file and run setup.exe as it is described in the *Installing Virto Gantt Web Part* section.

On the step 3 check the box “Upgrade” and click “Next”.

***Note**: if you have activated Virto ONE license, you do not need to activate it now.*

Uninstalling Virto Gantt Web Part

To uninstall the component:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.2013.GanttChart Part.X.X.zip** file.
2. The program performs the system checks again. Once that has successfully completed, the program prompts you to Repair or Remove the solution. Select Remove, and click “Next”.

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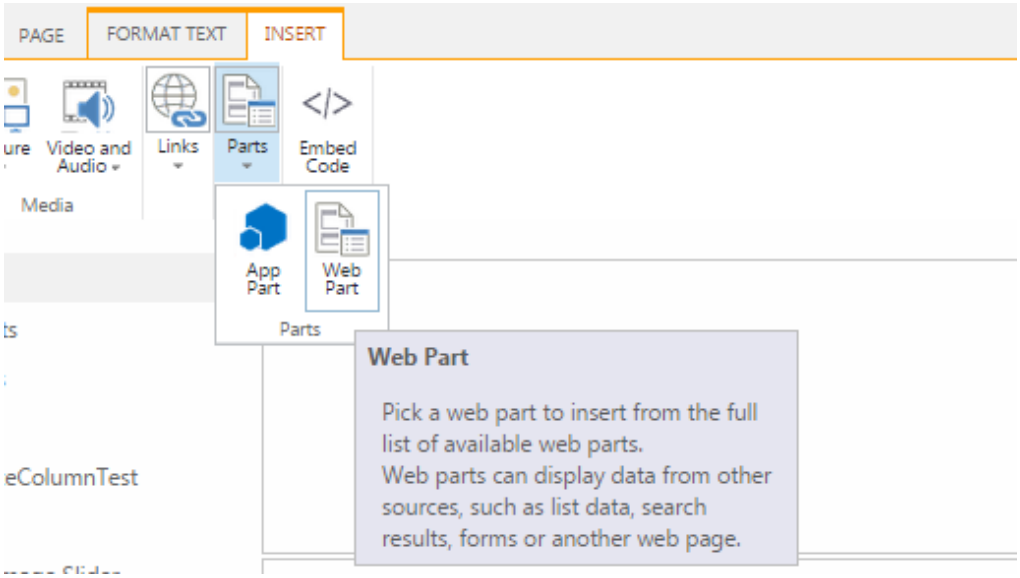
Virto Gantt Chart Web Part for SharePoint 2013, 2016 and 2019.

Product description

Virto Gantt Chart Web Part for SharePoint 2013, 2016 and 2019 is designed for displaying and managing SharePoint tasks in Gantt view. Virto Gantt Chart Web Part is a 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 Web Part; editing tasks directly from the Web Part (adding/moving/deleting/resizing); adding child tasks.

Adjustment

When the Gantt Chart Web Part is installed, go to the required SharePoint site page and add the web part through the site settings. Click “Edit” on Page, then press “Insert” on the ribbon and choose “Web Part”.



Select “Virto Solutions” in Categories and then select “Virto HTML5 Gantt” from the list of available web parts.

Now add Gantt Chart Web Part to the SharePoint site page and save the changes on page.

Click on link to configure the Web Part.

Note: *an administrator can add the Gantt Chart Web Part to the SharePoint site and adjust it. Then the web part can be saved as a template. Later on, this template can be used, and there is no need to adjust the web part every time.*

Configure Data Sources

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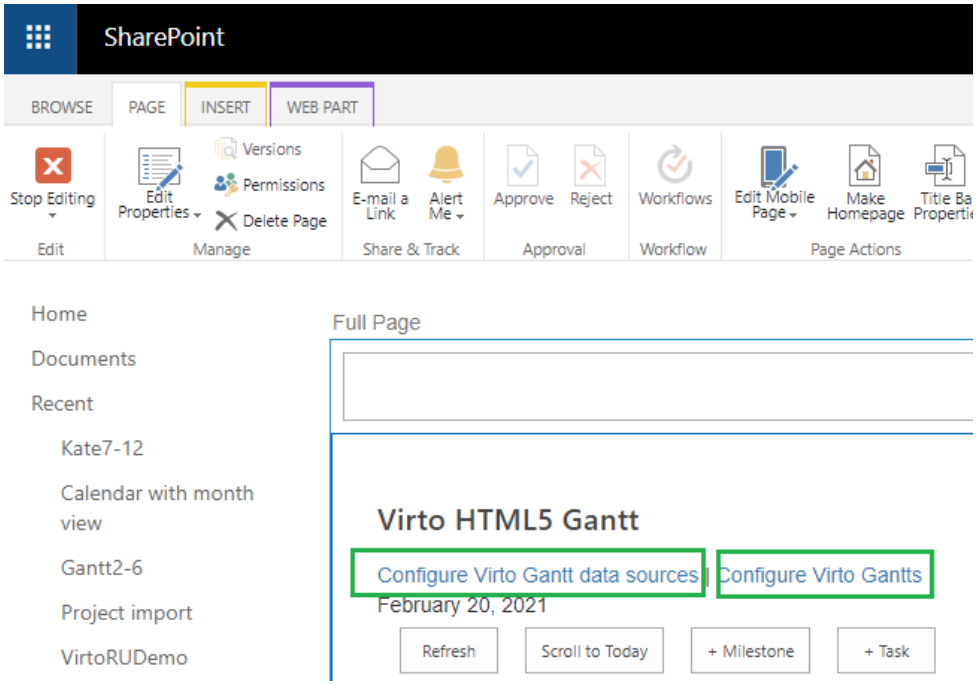
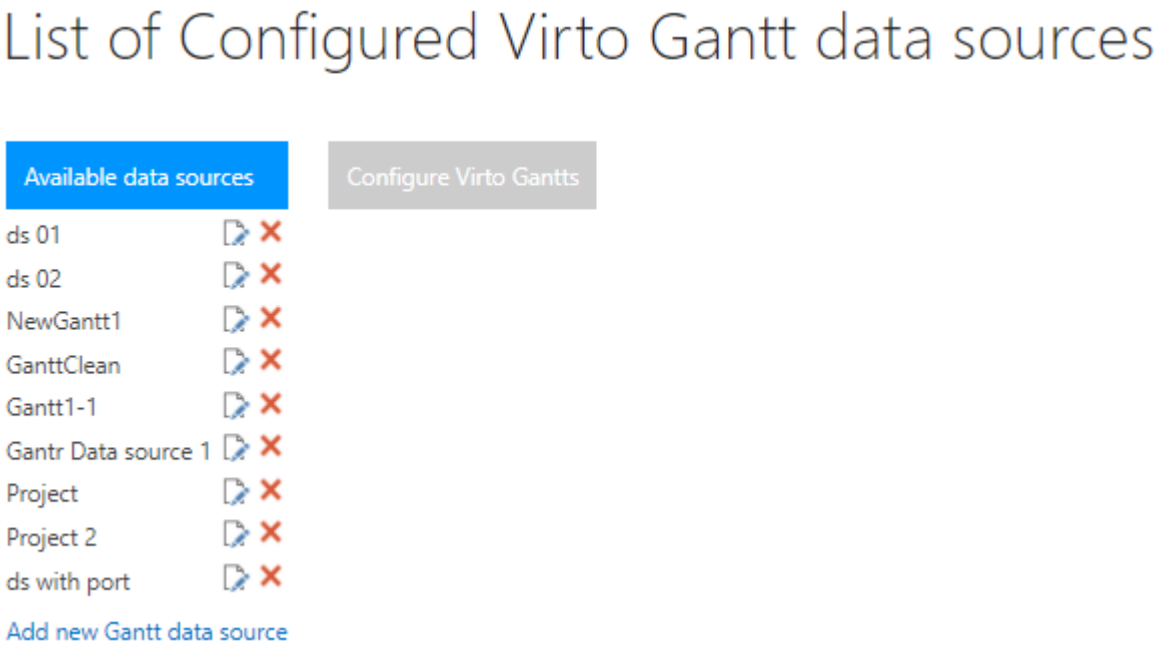
When you switch to the edit page mode, two links appear on top of the page:

1) Configure Virto Gantt data sources;
2) Configure Virto Gantts.



To adjust the Gantt view for a SharePoint list, you firstly need to define data source settings. Click "Configure Virto Gantt data sources".

The list of already configured data sources will appear. Here you can also add a new data source.



Click on link "**Add new Gantt data source**" and you will be redirected to the page to adjust a new data source.

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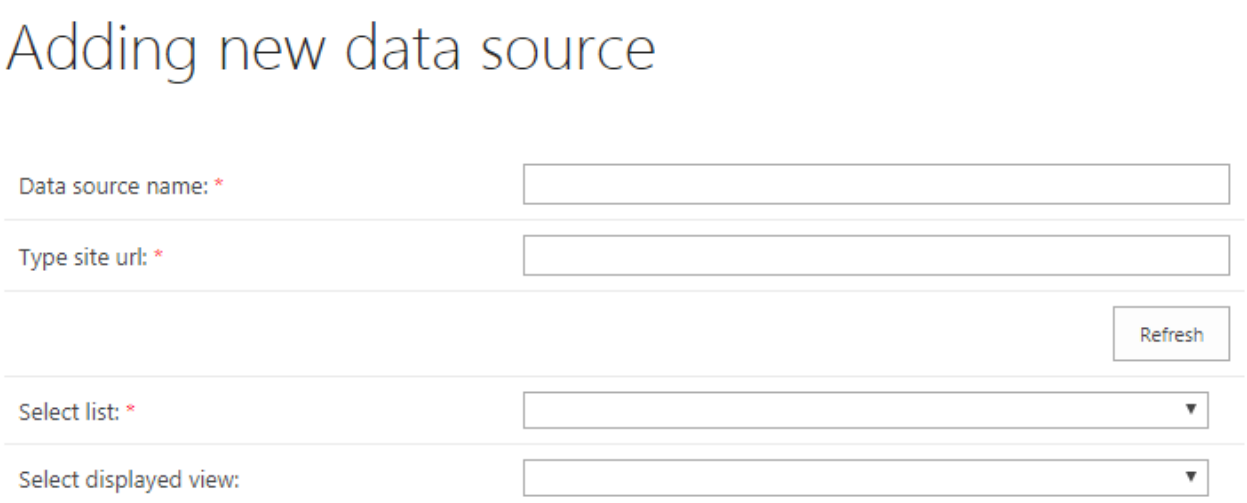
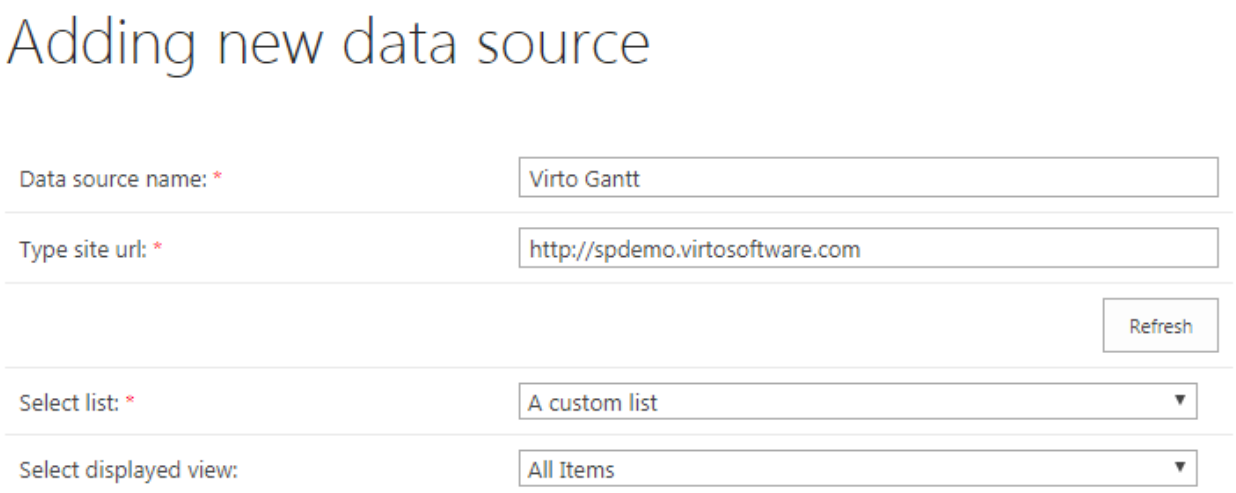


Required fields for data source are marked with "*" symbol.

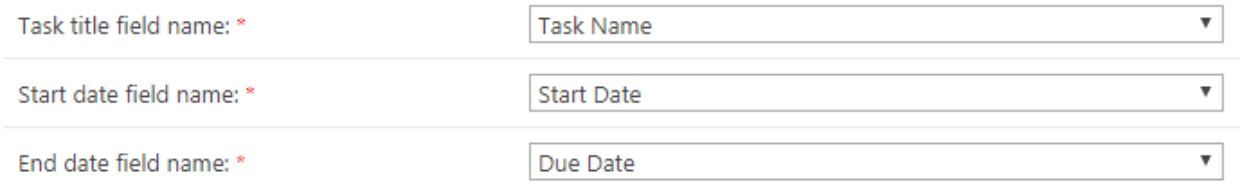
Add a data source name. Then select site URL or click "Refresh" button to choose current site.

Select list with tasks, which should be displayed in Virto Gantt Chart Web Part. Any list type can be used.

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



Select the field that will be displayed as a task title. Usually, task name is used, but you can assign any other field according to your project demands.



Select fields that contain **task start and end dates**. If a list contains a field with the task's percent of completion, you can select the field for the Gantt chart.

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

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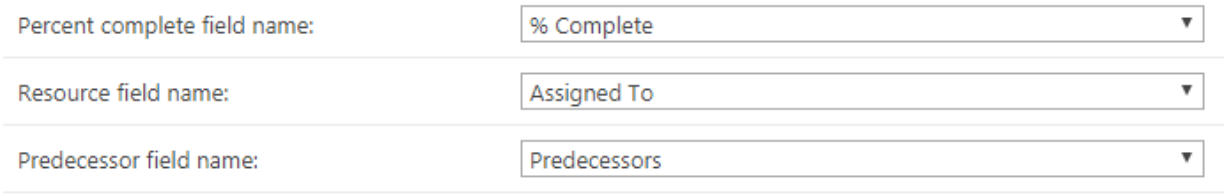
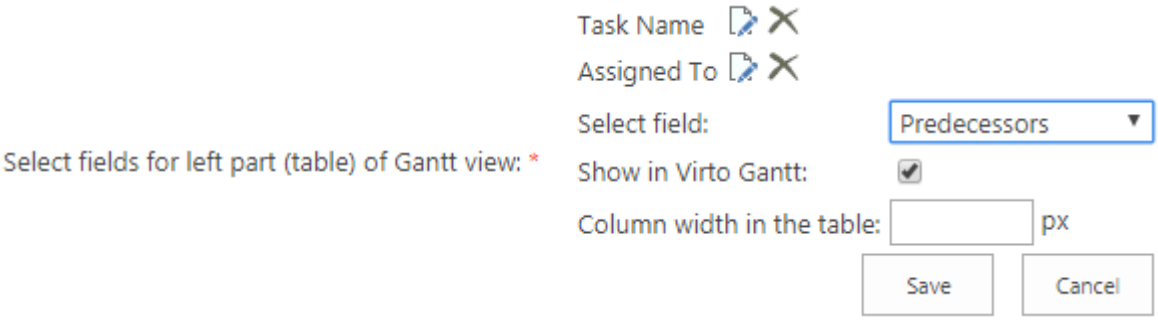
Select field with task **predecessor**(s). Predecessors and successors are connected through arrows in the Gantt chart.



You can define the set of list fields to display on the task form, child task form and milestone. Just use "**Add field**" button.

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



Specify the background colors for source rows and tasks. It is also possible to highlight task statuses or categories by a choice field. For example, you can define custom colors to distinguish task priority statuses.

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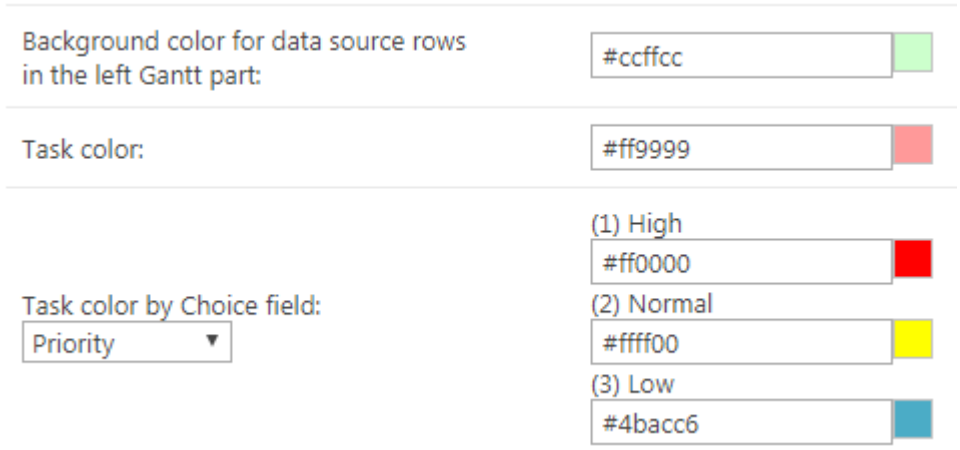
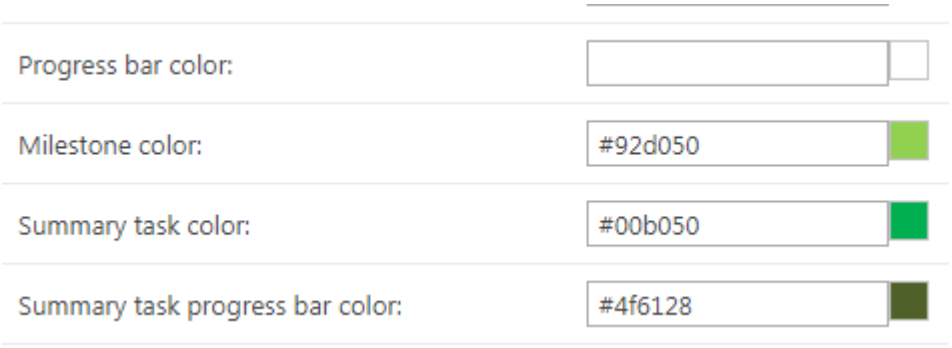
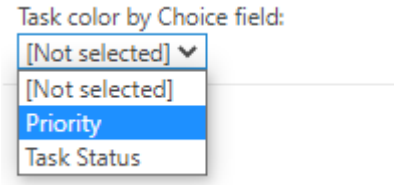


You can also define colors for the progress bar, milestones, summary tasks, and summary task progress bar.



In case there is a choice field in the data source list, you can choose it for color-coding of tasks depending on the value. The dropdown changes according to the selected list and its choice fields.



Click "Save" when you have finished with the fields. The new data source will appear in the list of available ones. Now you can add it as a source list for the Gantt chart.

Configure the Gantt Chart

To configure the Gantt chart switch to the edit page mode and click "**Configure Virto Gantts**".

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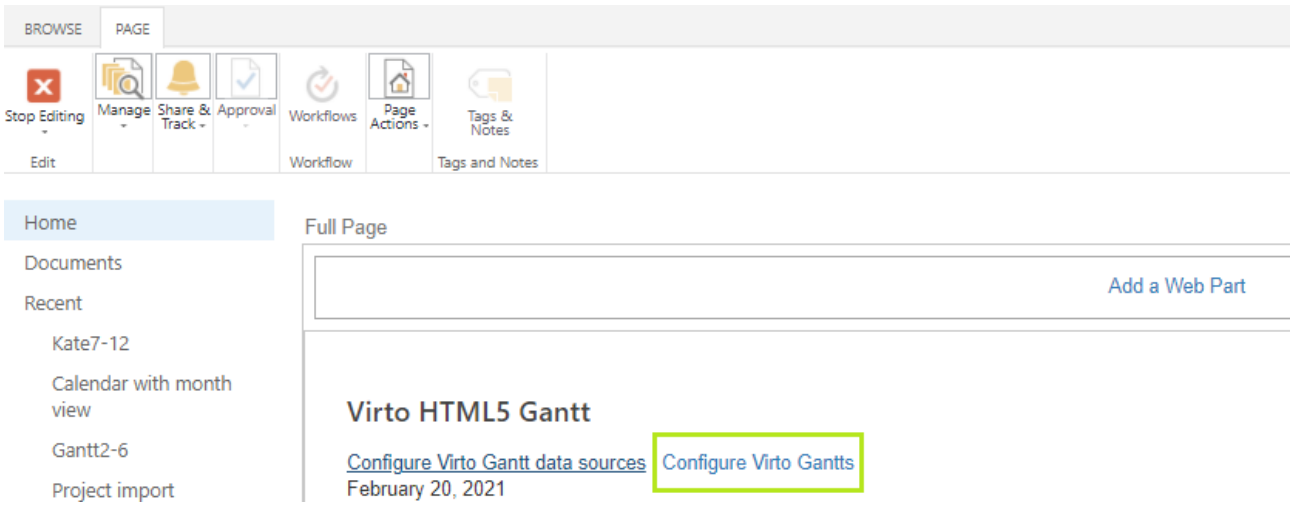

Or use the same button on the page with data source list.

On the page with available Gantts you can edit/delete existing configured Gantts or add a new Gantt.

Click “Add new Gantt” to add a new Gantt chart.

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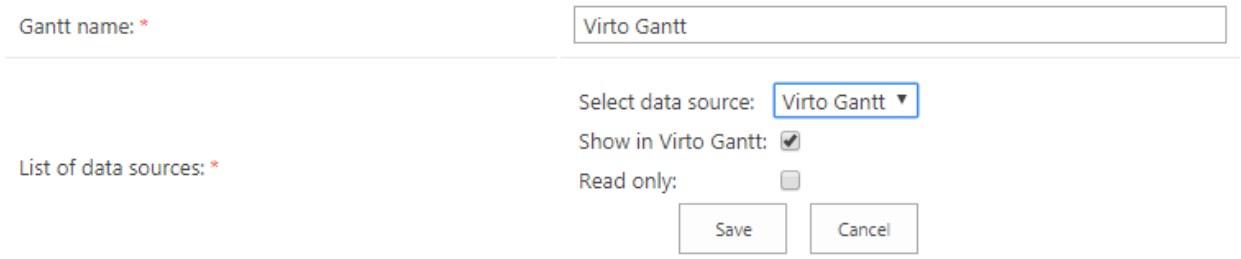
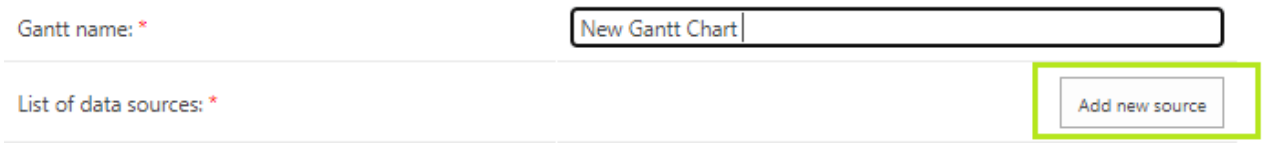
Adding new Gantt settings

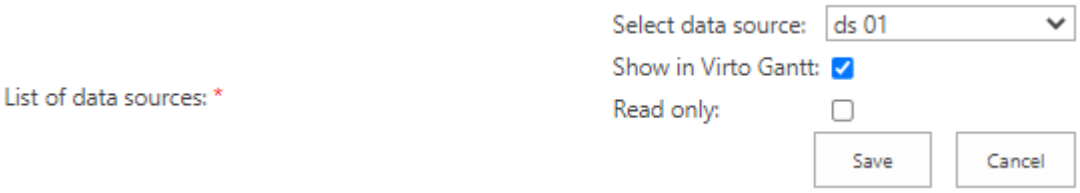


Required fields are marked with "*" symbol.

Type the Gantt name. Then click "Add new source" button to add at least one data source to the Gantt.



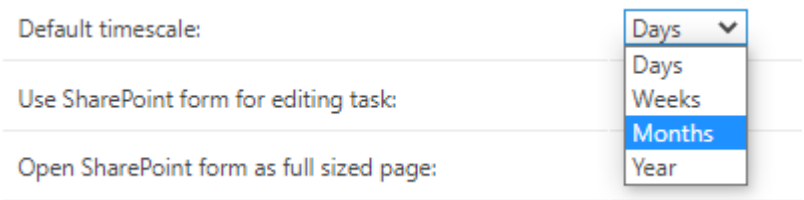
Every data source has its own options. You can tick off the checkbox "**Show in Virto SharePoint Gantt**". This data source will be unavailable for displaying (will be saved without publishing). Also, you can add data source with read only permission, i.e. user will not be able to create/modify tasks in the Gantt Chart Web Part for the data source.



Click "Save" button. You can add other data sources to this Gantt as well.

Then set height of Gantt in pixels if you want to limit size of Virto Gantt Chart Web Part displayed on site. Default height value is 800px, default width proportion is 100%.

Choose the default time scale (for example, days, weeks, months, and year).



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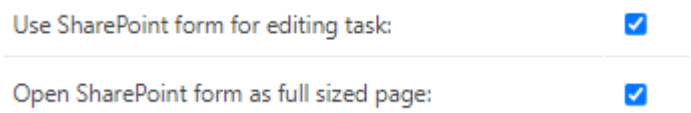
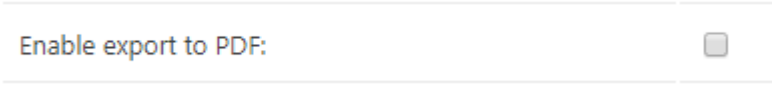
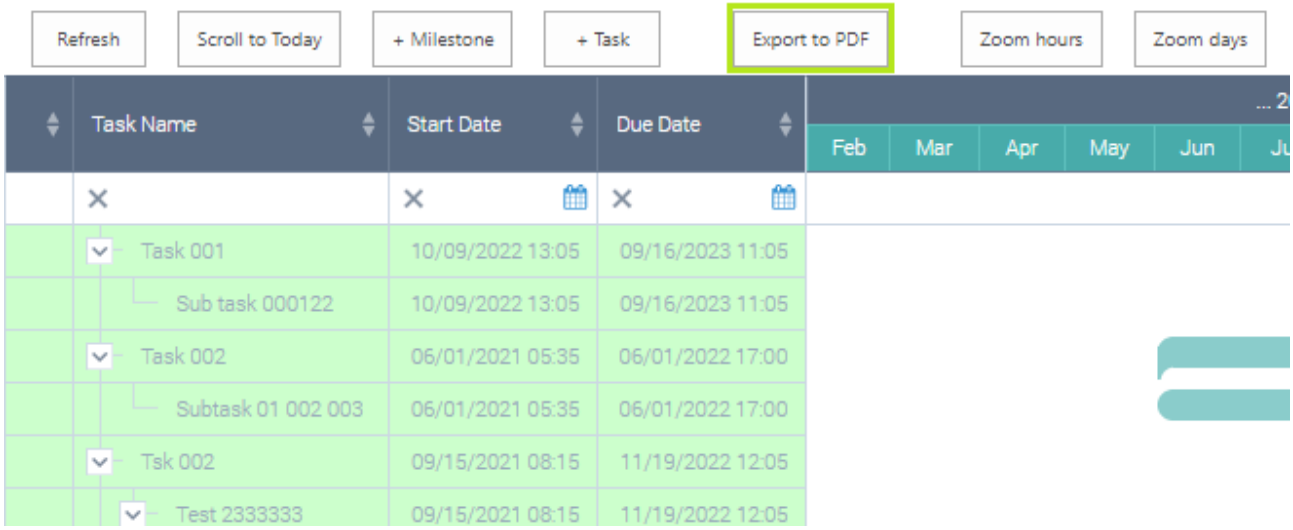
Tick the checkbox "**Use SharePoint form for editing task**" to display default SharePoint form for task editing. You can also allow opening the SP form as a full-size page.



The "Enable export to PDF" feature allows you to save your Gantt chart as PDF.

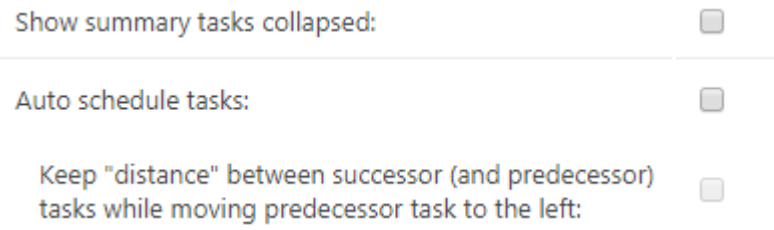


This option adds the button on the Gantt header; the PDF file with current Gantt table view will be downloaded automatically after you click this button.



The next option allows you to show summary tasks collapsed by default.

The **Auto schedule** feature helps to manage successor and predecessor tasks. It protects from cases when a successor task starts before the predecessor.



Click "Save" to complete the new Gantt adding. The same way you can edit an existing Gantt.

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Using Virto Gantt Chart Web Part

Layout of Virto Gantt Chart Web Part

Virto Gantt Chart Web Part consists of a header and the Gantt chart itself.

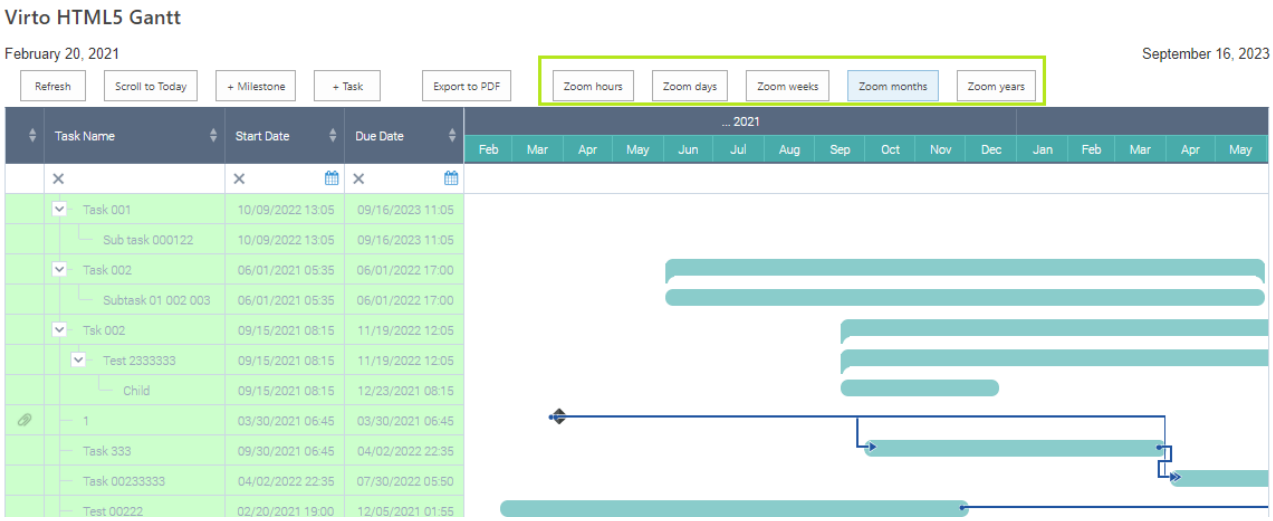
The left part shows the list of tasks. The right part displays the graphical structure and visualizes the duration and relations between the tasks. When you scroll tasks in the left part, the right part is scrolled accordingly.

Zoom Buttons

There are five zoom buttons:

- Zoom hours;
- Zoom days;
- Zoom weeks;
- Zoom months.

Use them to scale the Gantt chart as you need and navigate easily to a required time period.



Scroll to Today

Click “Scroll to Today” to see tasks related to the current date.

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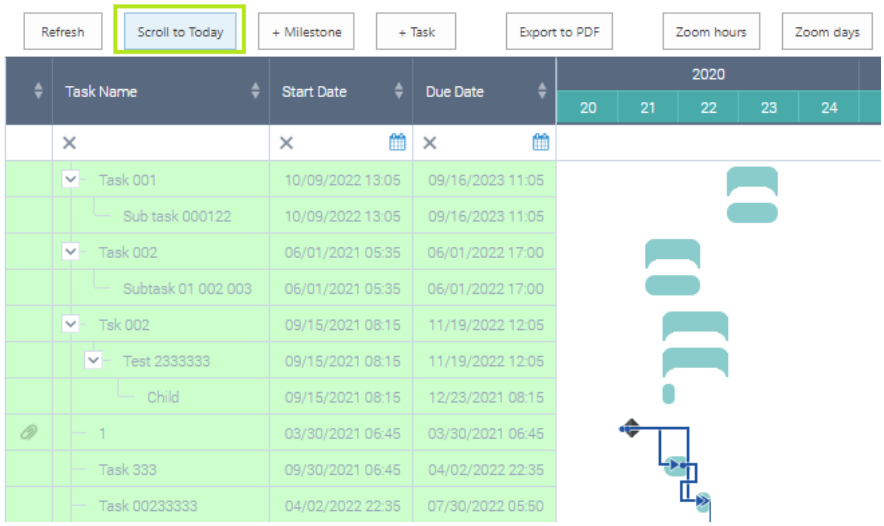
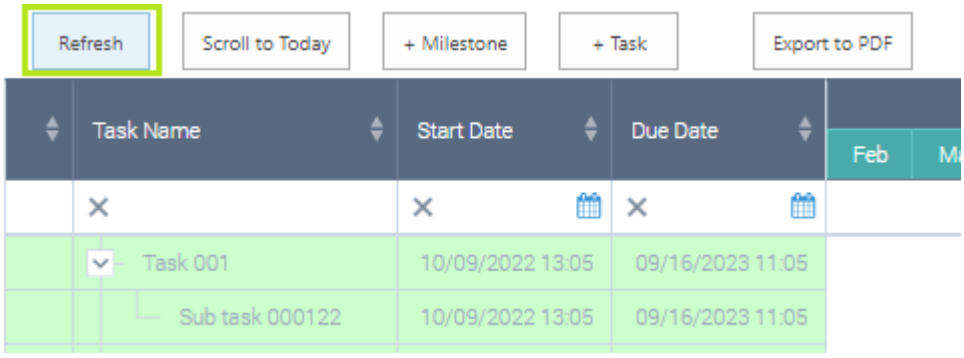
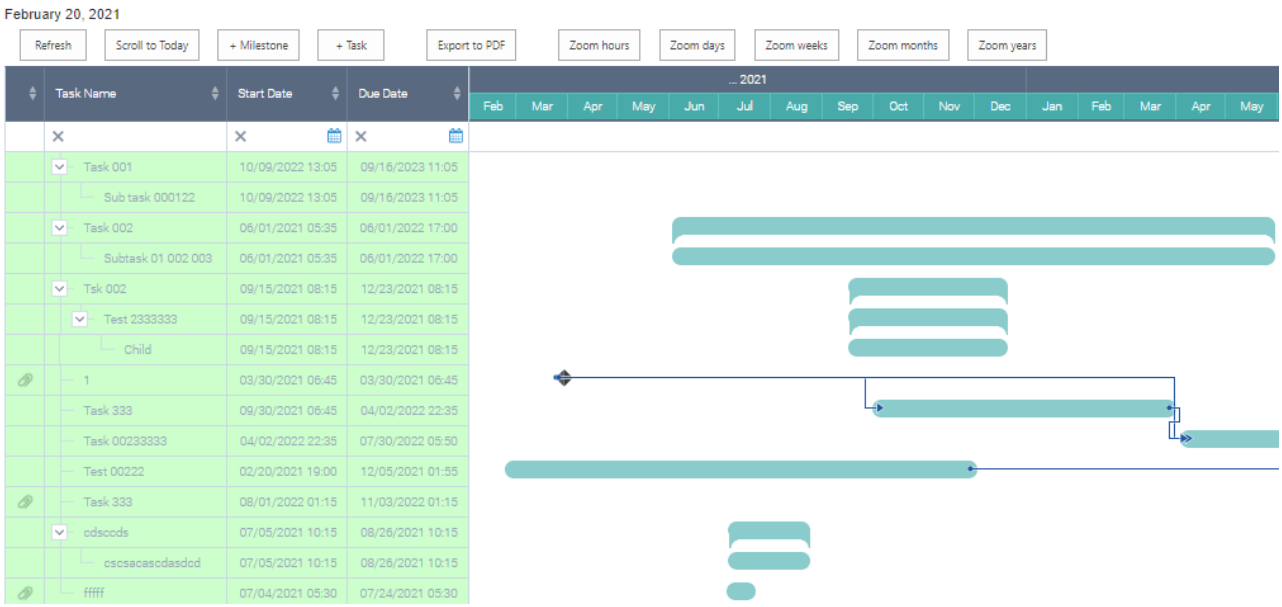


Refresh Button

Use refresh button to check if there any changes in the source lists applied to the chart automatically.



When the Gantt Chart Web Part for SharePoint, it looks like as follows.



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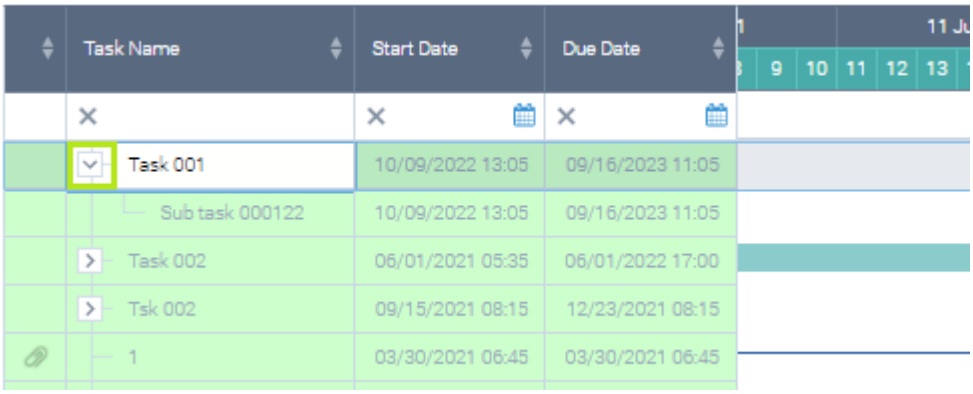
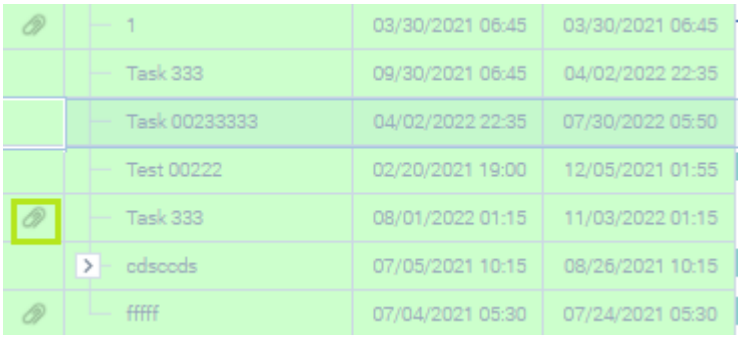
Working with Tasks in Virto Gantt Chart Web Part

Virto Gantt Chart web part allows you to add, delete, move and resize tasks right on the chart.

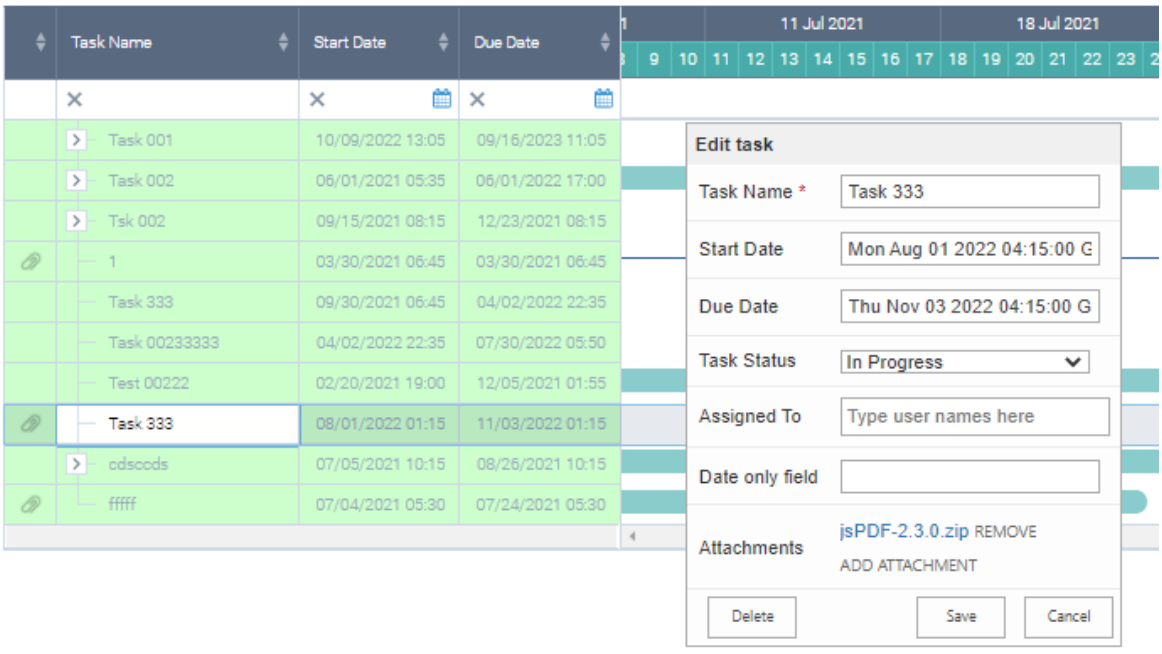
The structure of tasks is shown on the right. Click an arrow next to a parent task to see the child tasks related to it.



If a task contains any attachments, the attachment icon appears.



Double click the task title to see the details and open attachments or add/remove them.



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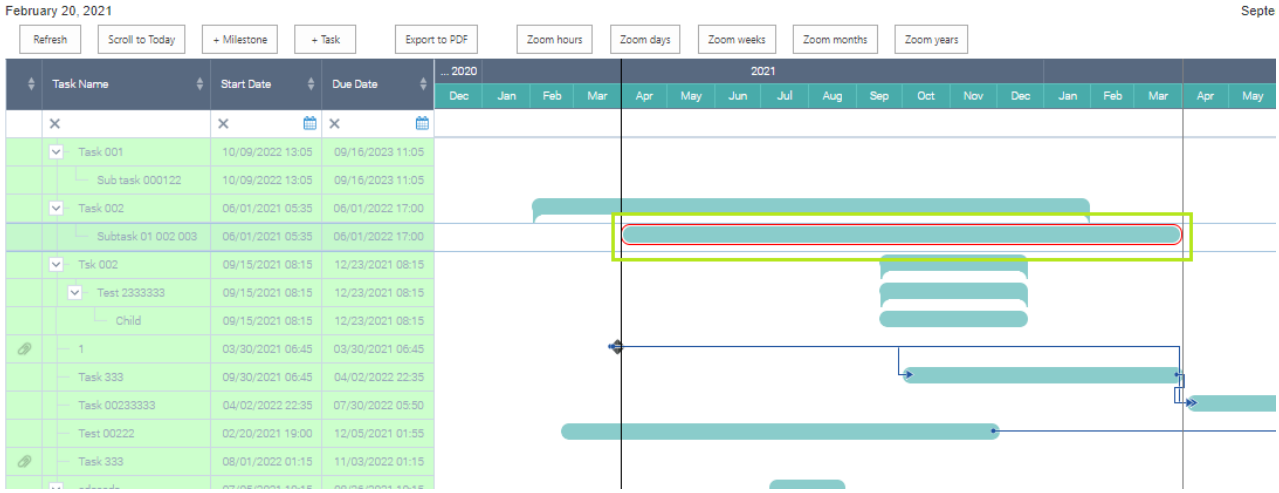
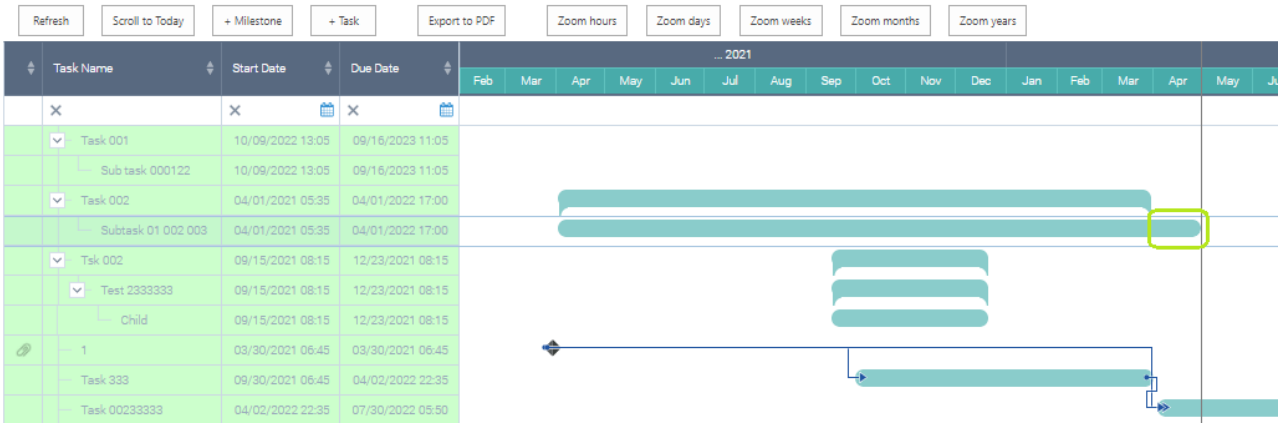
Moving Tasks and Changing Task Duration

You can easily change task dates by drag and drop. Drag a tasks to change its start and end dates.



If you drag a task tip, not the whole task, you can change the **duration** of this task — make it shorter or longer.



Editing and Deleting a Task

If you need to edit a task, just make a double click on it. The edit form will appear where you can make all the necessary changes.

***Note**: if the data source is read-only, view form will appear but you cannot make any changes. If data source is not read only, you can also delete the task. Just click "Delete" in the form.*

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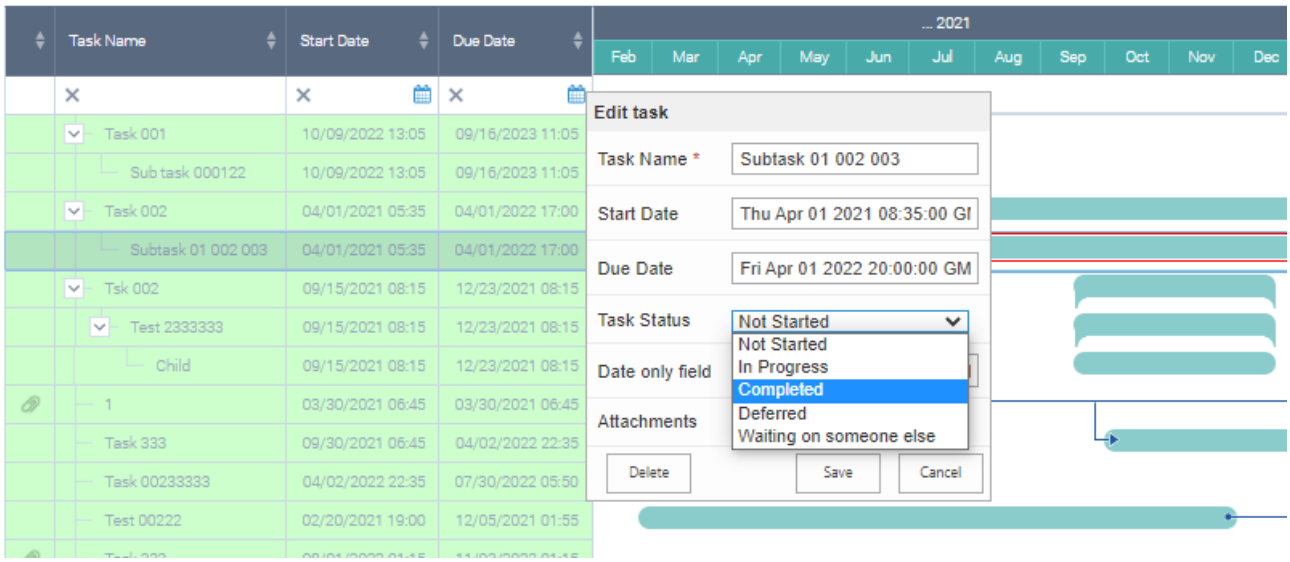
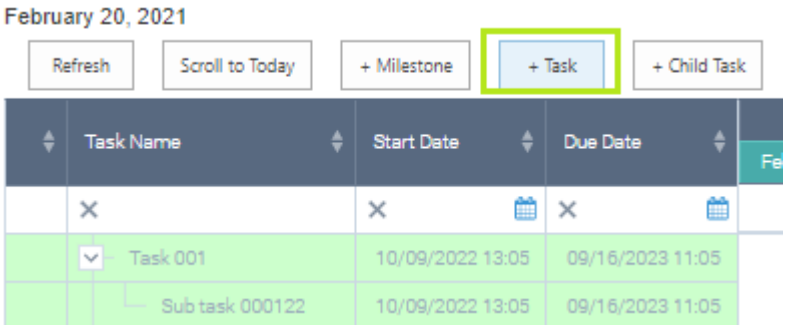


Creating a Task

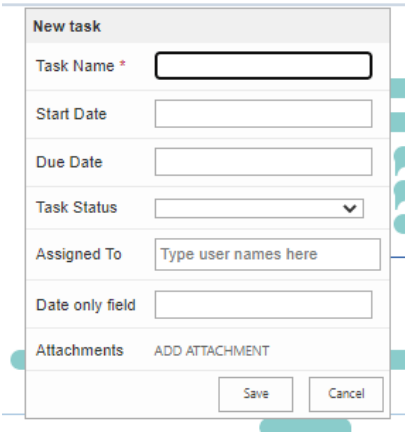
Virto Gantt Chart Web Part for SharePoint allows users to create task right in the Web Part. The same task will appear in the related data source list.

To create a new task, click "**+Task**" in the header**.**



The add task form will appear.

***Note**: the set of fields for create/edit form is set in the data source settings of the web part.*



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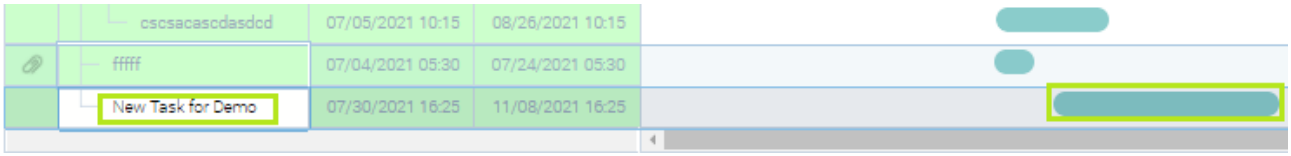
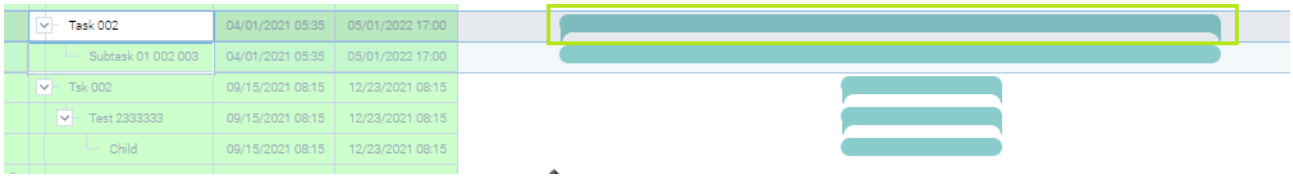
Type the title and define start and end time of a new task. By default, the new task will appear at the end of the list (or on the other position depending of the chosen view). The task will appear in the list of tasks on the right accordingly.

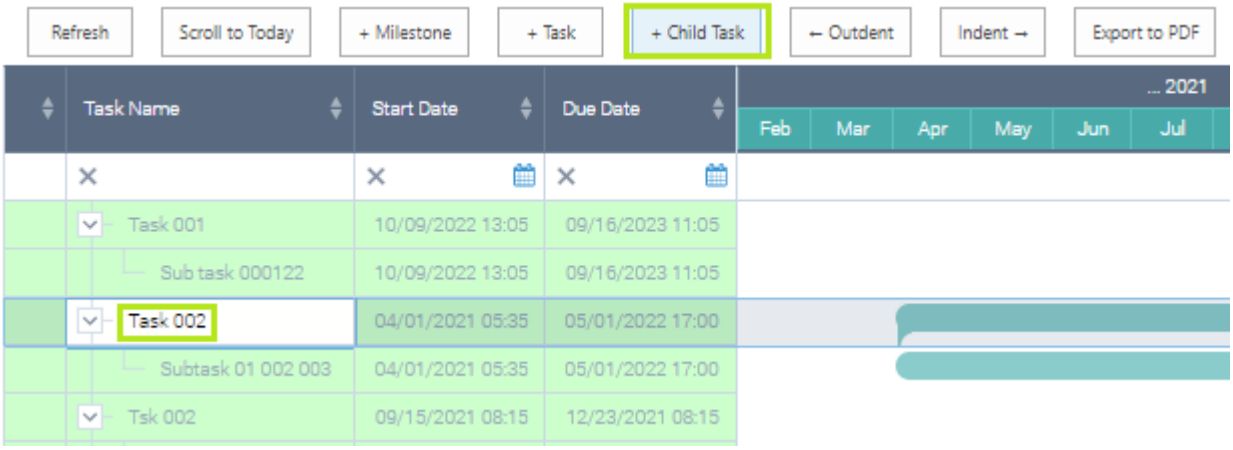


Add a Child Task

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



To add a child task, click a parent task on the right in the list. The "**+ Child Task**" button will appear. Ise it to create a child task the same way as you do for parent tasks.



To change the level of tasks, you can also use "**Indent**" and "**Outdent**" buttons. For example, I need to make the task "Task 333" a child of the task "Task 0022". So, I click a task 333 and use "Indent" button.

***Note**: the "Add Child Task" and "Indent/Outdent" buttons are available only incase the list template chosen as a data source is a Tasks template. If note, the buttons do not appear.*

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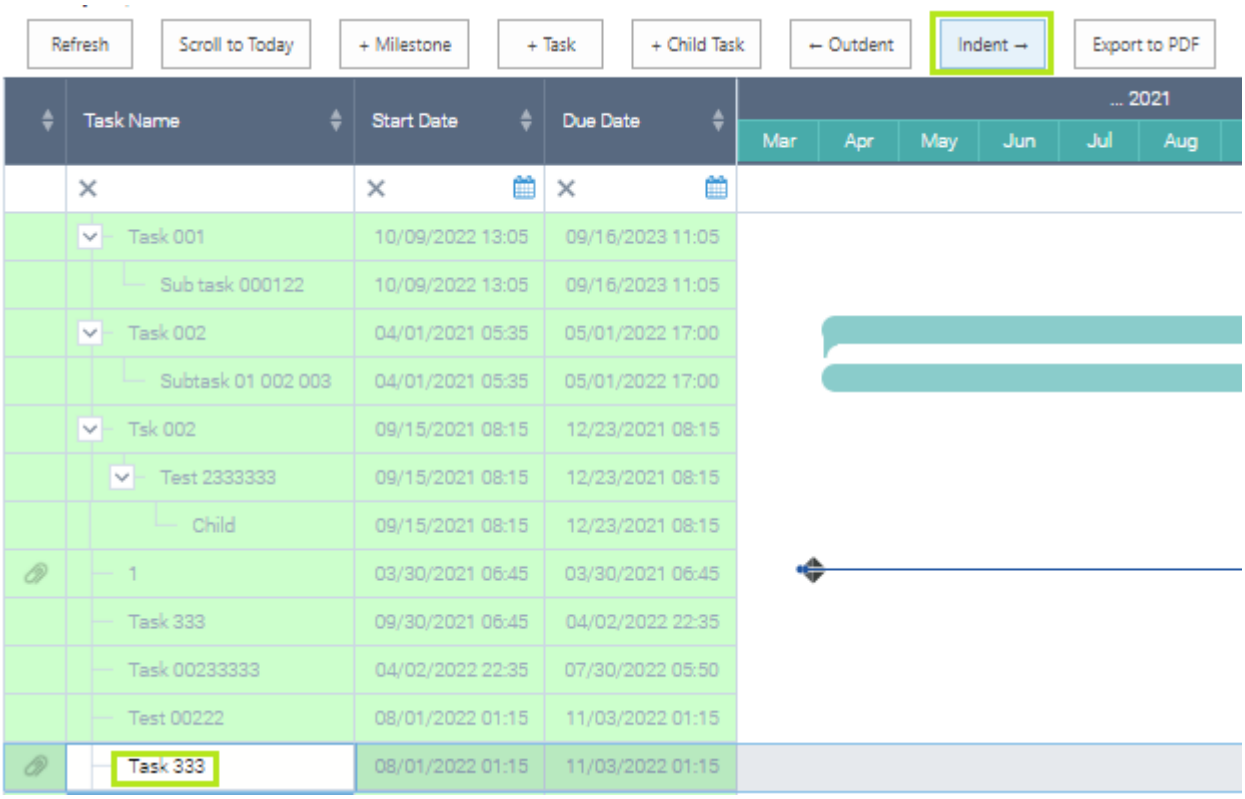
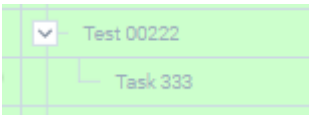


Now the task "Task 333" is a child task of "Test 00222" task.



***Note**: to let parent-child relation possible for your Gantt chart, make sure you choose the list with basic parent ID field. If the SharePoint list you're going to use as a data source is created in old SP versions or is a custom one, the parent-child relations may not work.*

Add a 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 – a task with zero duration.

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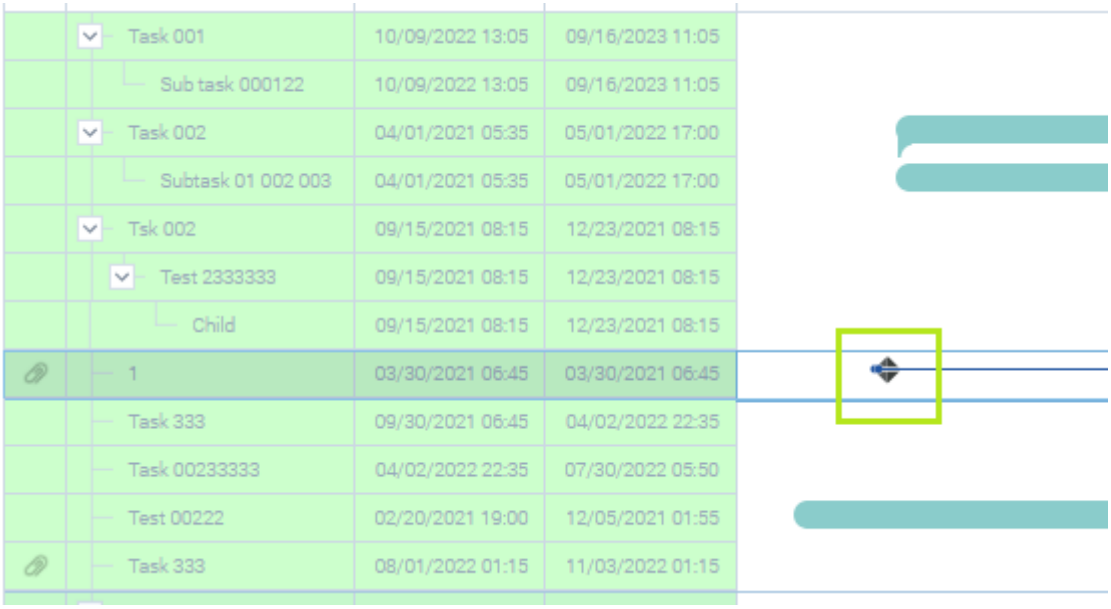
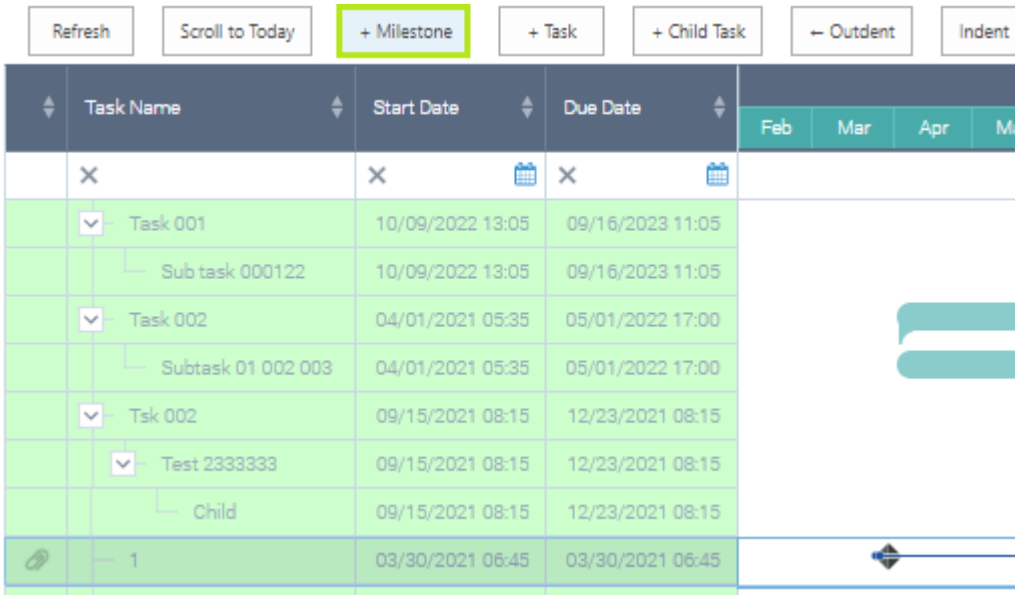


Or click "**+Milestone**" to add a milestone to the chart.



Predecessor and Successor tasks

Virto Gantt Chart Web Part 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.

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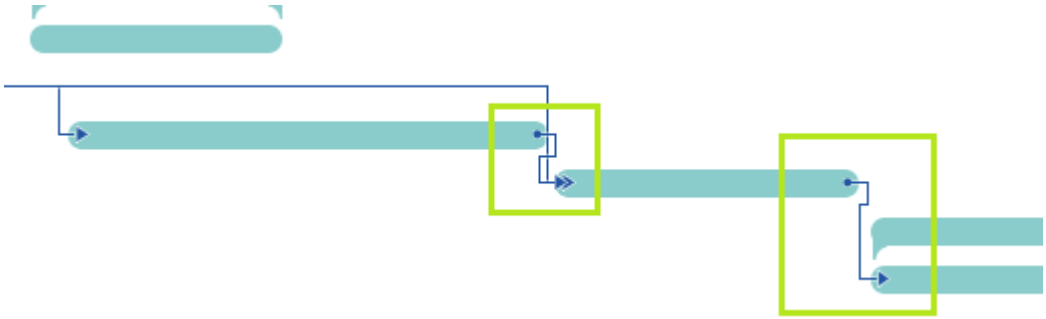
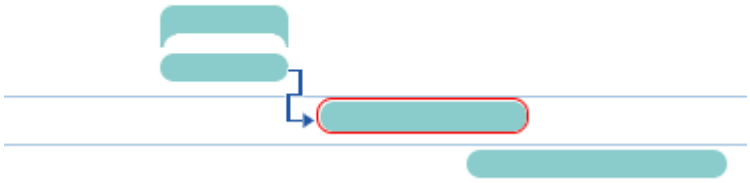
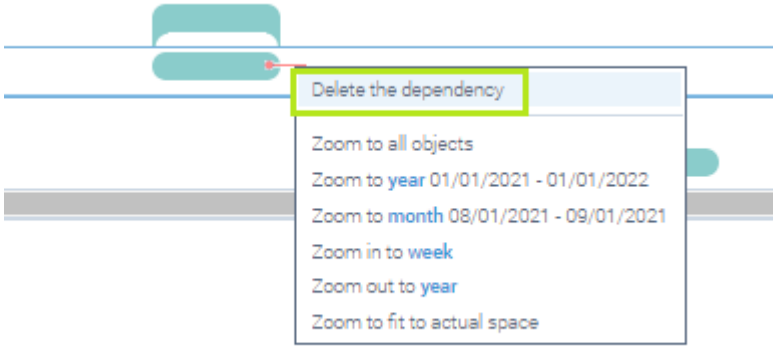


Virto Gantt Chart Web Part allows users to define finish-to-start relations between tasks and create successors and predecessors by simple arrows drag-and-drop. Just click a task that will be a predecessor and drag the arrow to a task which you want to make a successor.



To delete the dependency just click and select the arrow and then choose “Delete the dependency” in the menu appeared.



Resources

Users assigned to a task are displayed next to this task in the chart, if this column was added to data source view (see the Web Part 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 applied in the SharePoint data source list.

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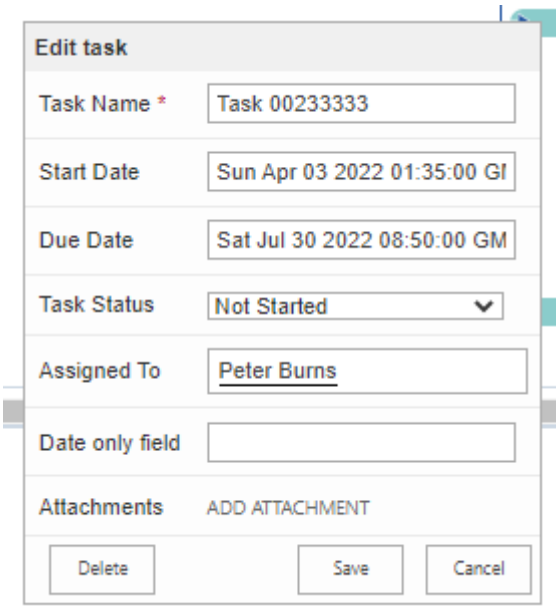
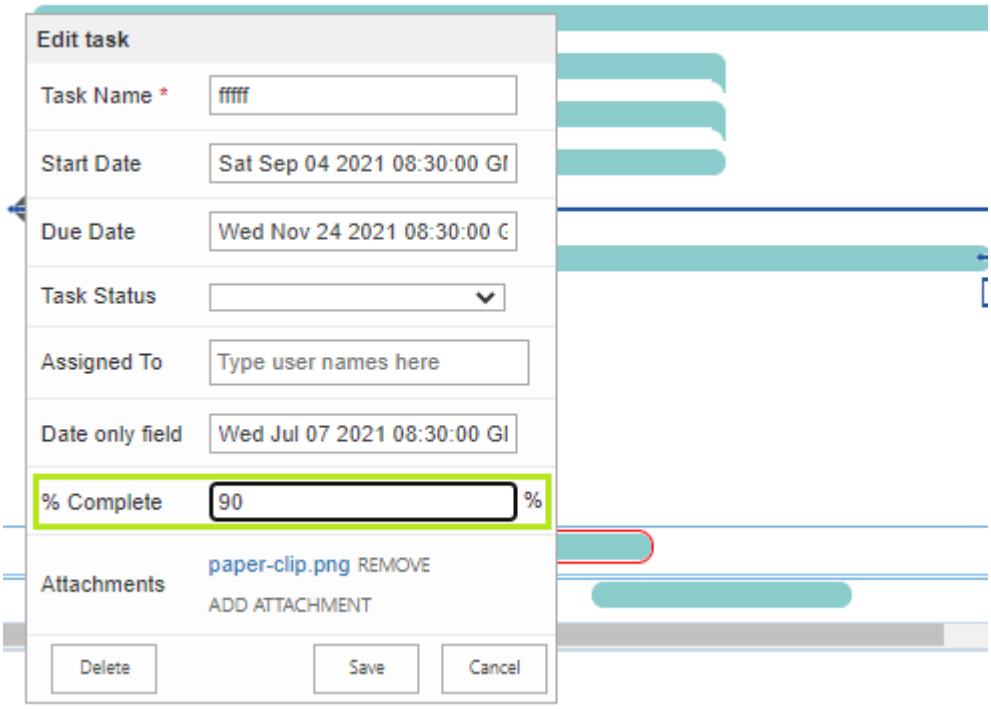


Percent Complete

The percent complete is displayed as different color area of the task body. To change the percent complete, double click the task and change it in the form. The completion of this task will also change on the chart.



The completed percentage appears as a strip on the task.

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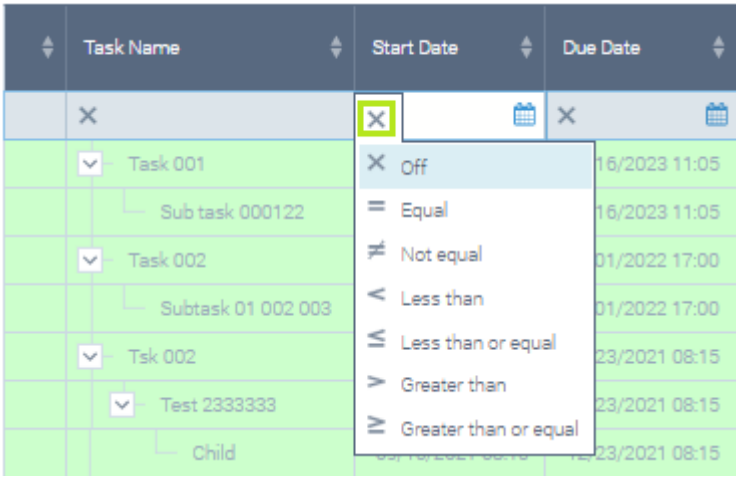
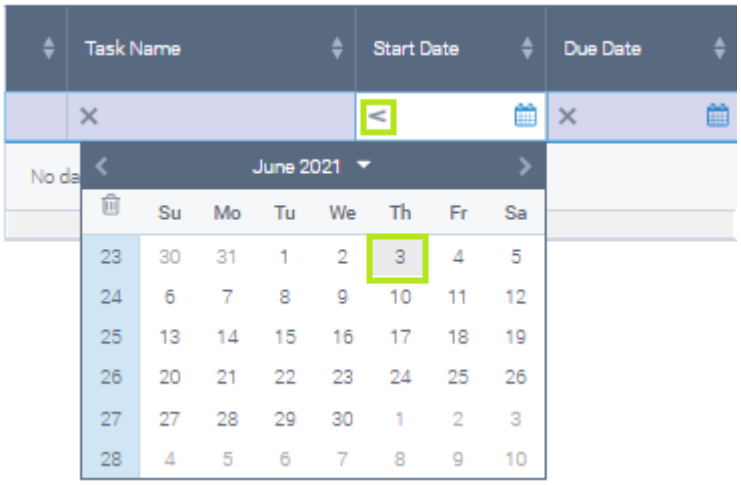
Filtering Tasks by Dates

You can use operators and filter/search tasks by their start/end dates. To set the filter, click “x” in the start or end date field.



There are following operators available for filtering: **equal**, **not equal**, **less than**, **less than or equal**, **greater than**, **greater than or equal**.

For example, apply the filter and display only tasks with a start date less than July 3. Click the “Less than” operator and pick the 3d of July date in the date picker.



The tasks will be filtered according to the set condition.

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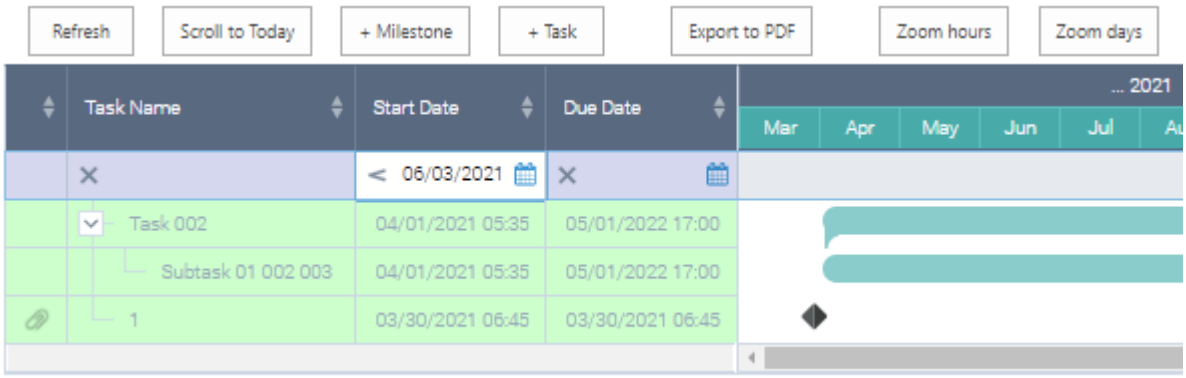

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Version Release History

Release Date	Version	Description
09/16/2021	4.7.3	[-]Bug with not opened SharePoint list item edit form has been fixed.
09/16/2021	4.7.2	[-]Minor bugs have been fixed.
09/14/2021	4.7.1	[+] Paging option has been added. [*] Performance has been improved.
07/30/2021	4.7.0	[*] Filtering by dates [*] Gantt rendering engine was changed [+] German localization

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