Virto SharePoint Gantt Chart App
for Office 365

User and Installation Guide

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Virto Gantt Chart App for Office 365

Office 365 Gantt Chart App is a practical project management solution designed for **displaying and managing SharePoint tasks in Gantt view on modern SharePoint sites**. Virto Gantt Chart App is a highly customizable project planning tool – a classic bar chart that illustrates a project schedule. Try also SharePoint Gantt Chart on-premise.

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.

Features List

- Display SharePoint lists in Gantt chart view.
- Using SharePoint list as a data source.
- Display multiple lists in a single chart.
- Adding new tasks/milestones right in the Gantt chart.
- Applying different timescales to view items.
- Quick switch to required time period.
- Scroll to current day tasks.
- Applying parent-child relations for tasks.
- Changing task duration with drag and drop.
- Adding task resources.
- Changing percent complete with drag and drop.
- Ability to define read-only settings.
- Color-coding for tasks/summary tasks/milestones/percent complete.
- Ability to define background color of data source rows.
- Managing tasks order by adding predecessors.
- Using filters to sort/search tasks.

## System/Developer Requirements

Operating System
SharePoint Online / Office 365

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

Virto Gantt Chart App Installation and Configuration

Add the app from [Microsoft App Source](#) or find it on the [product page](#). When Virto Gantt Chart App is installed, it is added to your site on the Site Contents page.
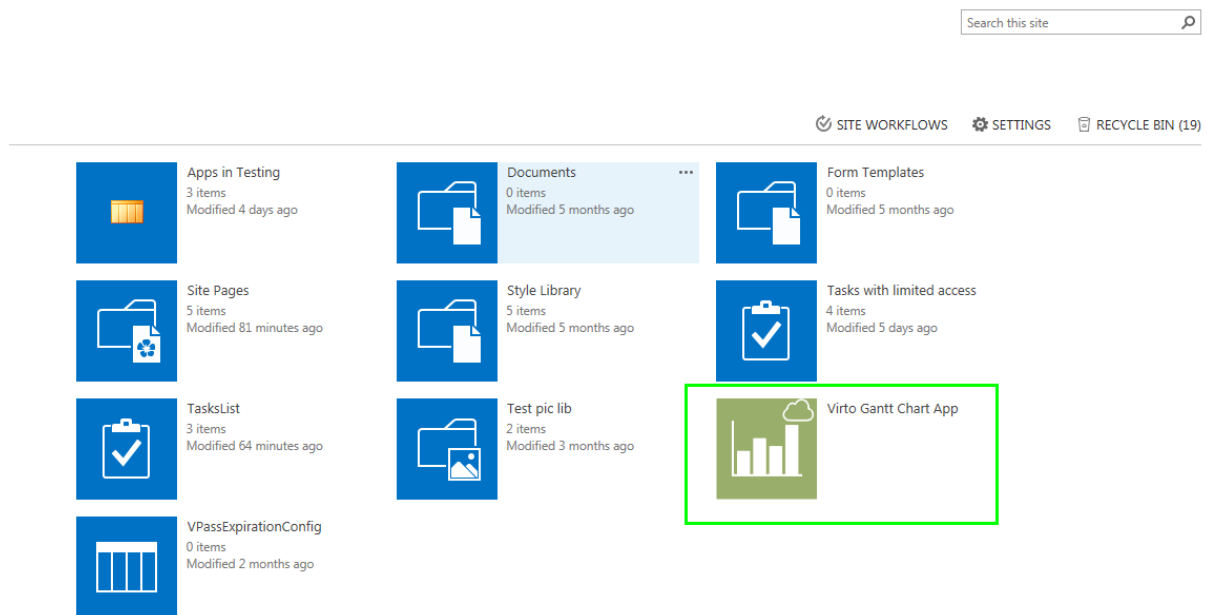
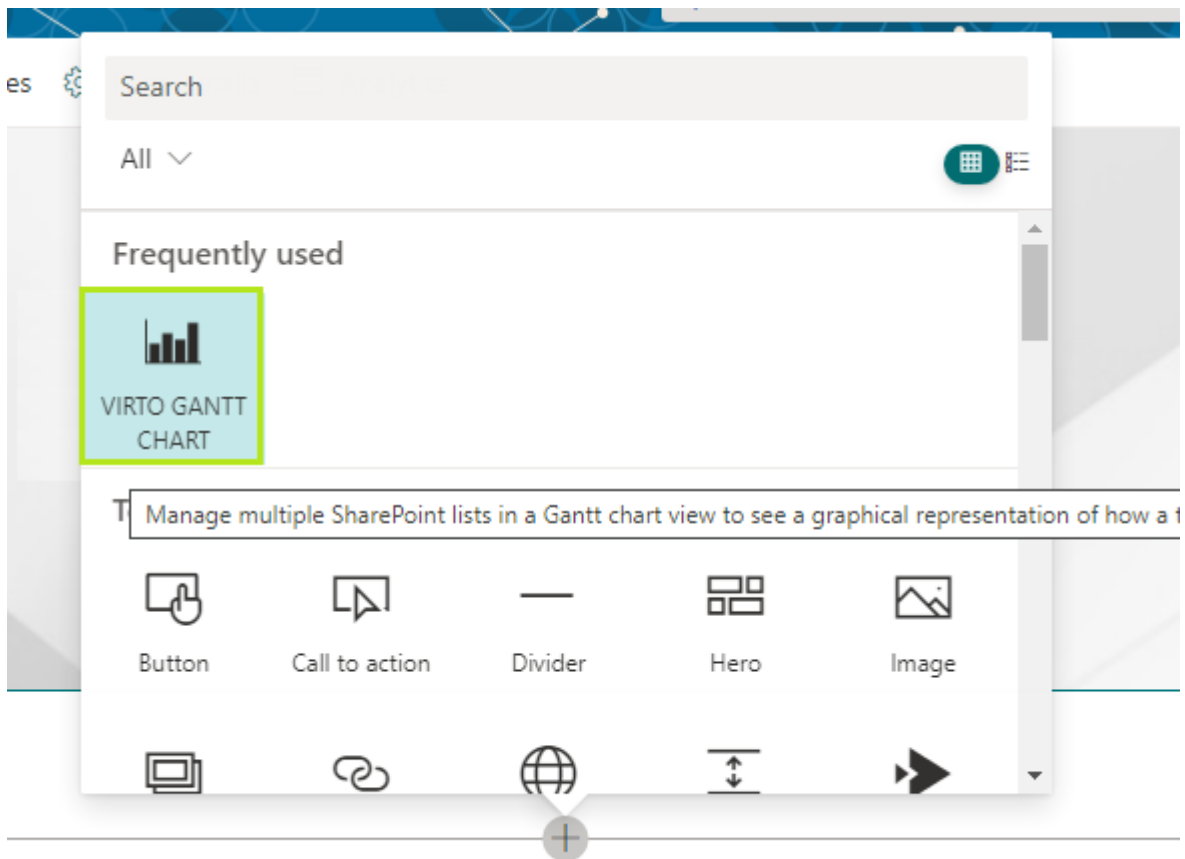
Adding Virto Gantt Chart App on a SharePoint page

Open SharePoint site page where you would like to add the Virto Gantt Chart App. Switch to edit page mode by click on the **Edit** icon.
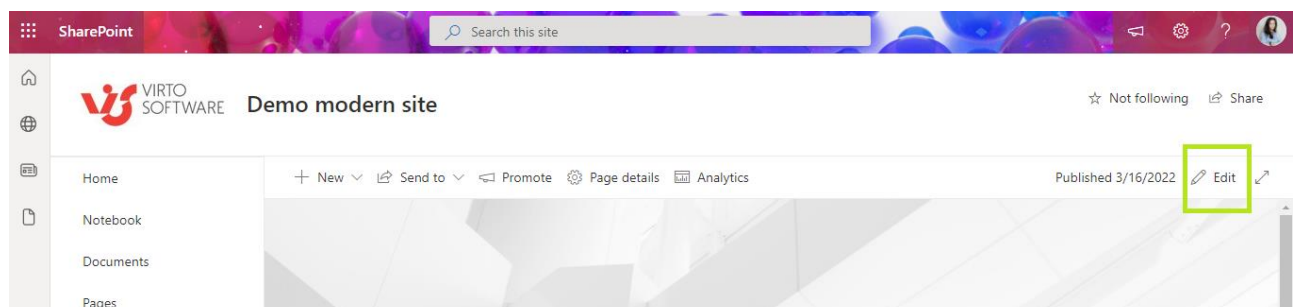
Click the Plus icon to add a new app part.

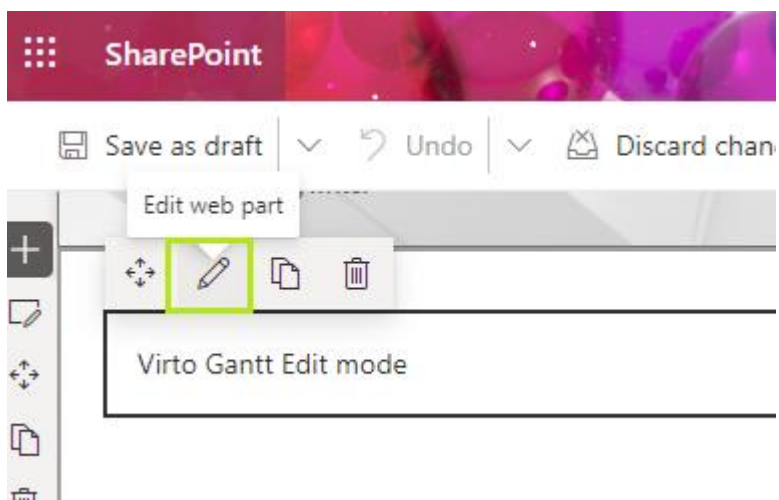
Then choose the Virto Gantt Chart App.

Virto Gantt Chart Configuration

Then switch to the Edit page mode to start configuration of the Virto Gantt Chart.

Now click "Edit web part".

The configuration of Virto Gantt Chart app consists of two basic steps:

1. **Configuration of Data sources** — adding SharePoint lists with task information.
2. **Configuration of Gantts** — creating Gantt views with chosen single o or multiple data sources.

Configure Data Sources

Before you adjust Gantt view, configure data sources. You may use a single SharePoint list as a data source or choose multiple lists to display in a single Gantt chart.

Note: SharePoint Task list is the best option of a data source for your future Gantt chart. However, you can use custom SharePoint list too. Just make sure it contains fields you can use for proper work of the Gantt chart (start/end date, lookup field for predecessor, and etc.). The data source list also should contain the Parent ID field.

In the Edit page mode click "Edit web part". The Virto Gantt Chart app settings will appear on the right part of the page.
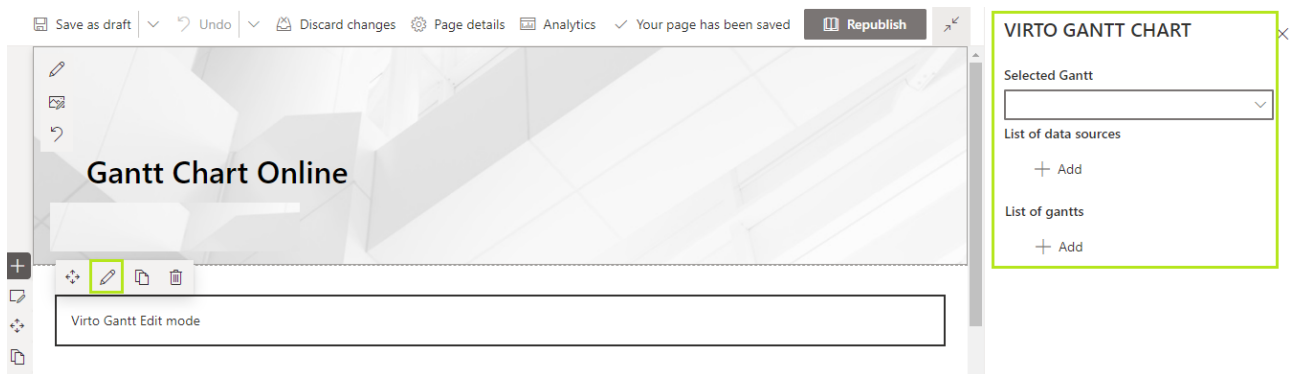
Click "Add" under the List of data sources.

Now fill in the fields as described in the steps below to add the new data source to the app.

Step 1. Specify the name of the new data source and type the site URL where the list you're going to add belongs to (the URL of the current site appears automatically, but you can change it).

Step 2. Choose a SharePoint list.

Step 3. Now chose the fields from your list to show in the Gantt chart. Make sure you have chosen all the required fields.

Step 4. Decide which fields you would like to show in the table part of the Gantt chart.

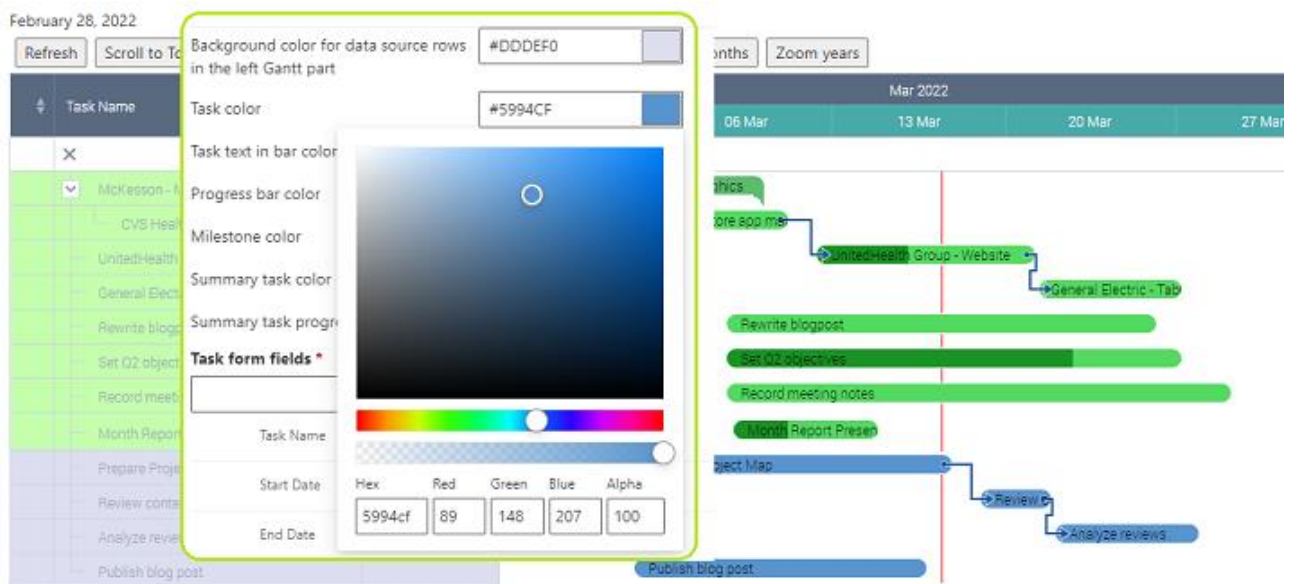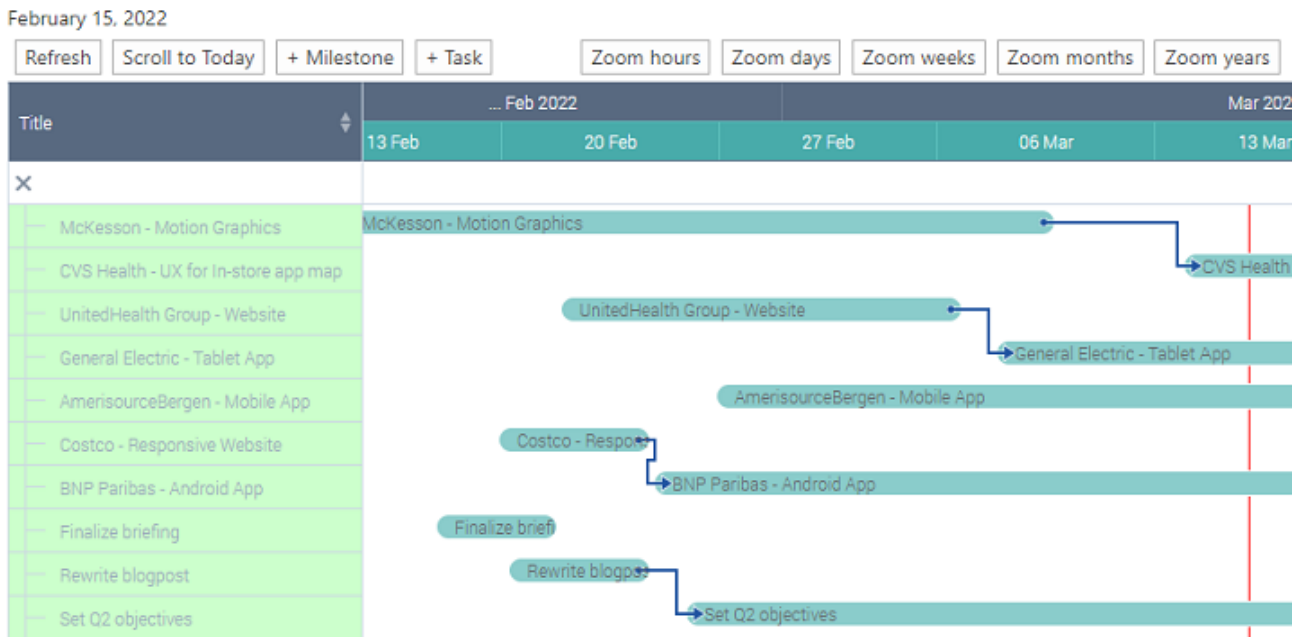**Step 5**. Color-code the tasks. You can specify colors for data source rows on the left part of the Gantt, tasks, text in bar, milestone, summary task and task progress bar.

Color-coded Gantt chart may look completely different to default colors. Use this functionality to distinguish multiple data sources and for other purposes. Compare classic and color-coded Gantt charts below.

February 15, 2022

| Refresh | Scroll to Today | + Milestone | + Task | | Zoom hours | Zoom days | Zoom weeks | Zoom months | Zoom years |

February 28, 2022

Step 6. Decide which fields you need to display in the task view form.

Task form fields *

| Start Date | ∨ | **+ Add** |

🗑 Delete

✅ Task Name

You also can define fields to display in child task and milestone forms.

Task form fields *

Title	⌄	+ Add

Task Name

Start Date

End Date

Child task form fields *

Task Name	⌄	+ Add

Title

Start Date

End Date

Milestone task form fields *

Task Name	⌄	+ Add

Title

Start Date

Remember to save the new data source.

Milestone task form fields *

Task Name	⌄	+ Add

Title

Start Date

Save	Cancel

This way you can add as many data sources as you need and use them for creating Gantt charts.

Selected Gantt

Marketing and Content Projects ⌄

List of data sources

+ Add

Content tasks

Marketing Projects

Content Dep

Marketing Dep

Configure Gantt Chart

When the list of data sources (or at least one data source) is ready, you can create Gantts. Gantt in the Virto Gantt Chart app is name of a single chart with chosen data sources and applied settings. You can switch between available Gants and analyze your projects on a single SharePoint site page. To configure the Gantt chart switch to the edit page mode and click "**Add**" under List of gantts.

VIRTO GANTT CHART   ✕

List of gantts

+ Add

Step 1. Specify the name for new Gantt.

Adding gantt   ✕

Gantt name *   Accounting Tasks 2

List of data sources *

+ Add

Step 2. Click "Add" under List of data sources and choose at least one data source for the Gantt. Remember to save the added data source.

*Note: you can make the data source **read-only** to disable making changes on it.*

You can add multiple data sources to your Gantt chart.

Step 3. Specify height and table width, choose the default timescale and page size.

Height	100px
Table width	200px
Default timescale *	Weeks
Page size	100

Pagination will be displayed if the number of tasks exceeds the number of stated in the field. The minimum value for the field is 10 tasks per page

Step 4. Define the date and time format, if necessary.

Date format	
Time format	

Step 5. Tick "Enable export to PDF", if you would like to allow the option. You also can display the summary tasks collapsed and enable **auto-scheduling** tasks.

"**Auto-schedule tasks**" option will help you to move child tasks accordingly when a summary tasks is rescheduled. If you need to allow doing this only manually, uncheck the option.

Also, pay attention to the option "**Keep distance between successor tasks while moving predecessors tasks to the left**". This option is active only when the "Auto-schedule option" is chosen. If you enable it, then the distance between the successor and the predecessor will be the same after rescheduling the predecessor. If you don't enable this option, a successor will start right after predecessor ends.

Note: if the auto schedule option is enabled, you can set predecessor-successor relations only between non-parent tasks and child tasks. Parent task cannot be a a predecessor or successor in this case.

|	
Enable export to PDF	✓
Show summary tasks collapsed	☐
Auto schedule tasks	✓
Keep 'distance' between successor (and predecessor) tasks while moving predeccessor task to the left	☐

Save   Cancel

Remember to save the Gantt.

# Using Virto Gantt Chart App

Layout of Virto Gantt Chart App

A tuned Gantt chart of the Virto Gantt Chart App consists of a top panel with tools and navigation buttons and a Gantt chart itself.
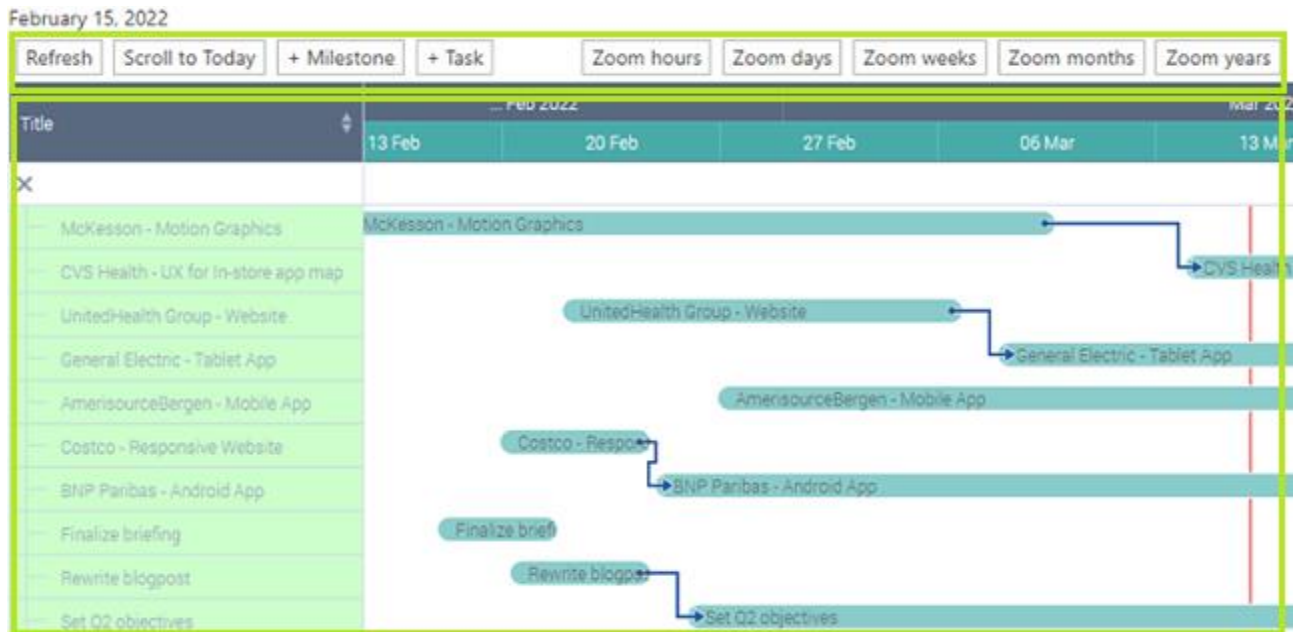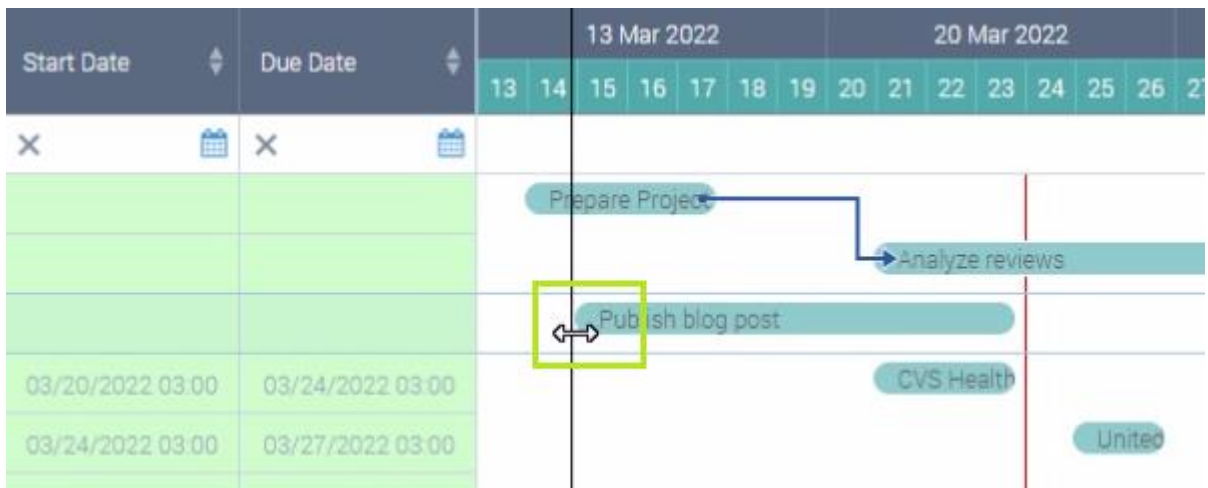

The left part contains the list of tasks from all the chosen data sources. The right part displays the graphical structure of tasks, their duration, percent completion, the order, and parent-child relations. When you scroll tasks in the left part, the right part is scrolled accordingly.

Use "**Scroll to Today**" button to switch quickly to the current day within the chosen timescale.
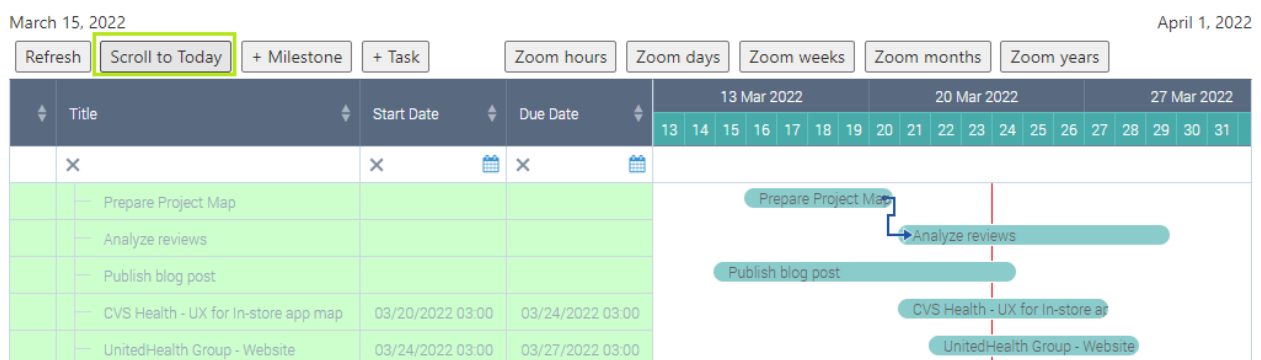
To change the timescale, use one of the following buttons: "**Zoom hours**", "**Zoom days**", "**Zoom weeks**", "**Zoom years**". Choose the appropriate one depending on tasks' duration. Remember that you can choose a default timescale in the Gantt settings.

Actions with Tasks in Virto Gantt Chart App

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

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

Moving Tasks and Changing Task Duration

You can easily change task dates by drag and drop. Drag the task to the date/time you need it to start. The end date will change accordingly (the duration is left the same in this case).

If you need to change the duration, you drag just the start or end of the task bar. The same changes will be done in the source SharePoint list.

Editing a Task

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

Note: the edit form can be customized. Return back to the data source settings to add more fields to display in it.

Deleting a Task

You can delete a task it the data source is not read only. Double click the task you wish to delete and click "Delete".

Creating a Task

Virto Gantt Chart App for SharePoint Online supports creating tasks right in the chart. The same changes will be done in the source SharePoint list.

Click **"+ Task"** button.

Specify the task name, choose the data source list (for Gantts with multiple data sources), define the start and end dates. You also can set predecessor, add attachments, set the percent completion and assign the task to a user or group.

The new task will appear in the table and on the chart depending on its start/end dates and relations with other tasks.

Milestone

Milestone is a task with zero duration, its start date is equal to the end date. To add a milestone, click "+ Milestone".

March 14, 2022

⇕	Title	⇕	Start Date	⇕	Due Date
	✕		✕	📅	✕
	— Prepare Project Map				

Refresh | Scroll to Today | + Milestone | + Task | Zoom hours

Fill in the fields and choose the milestone date. Click "Save".

New task

Data source:	undefined ⌄
Title	Review
Milestone date *	Mar 18, 2022 10:25:00 PM
Attachments	Add attachment

Save | Cancel
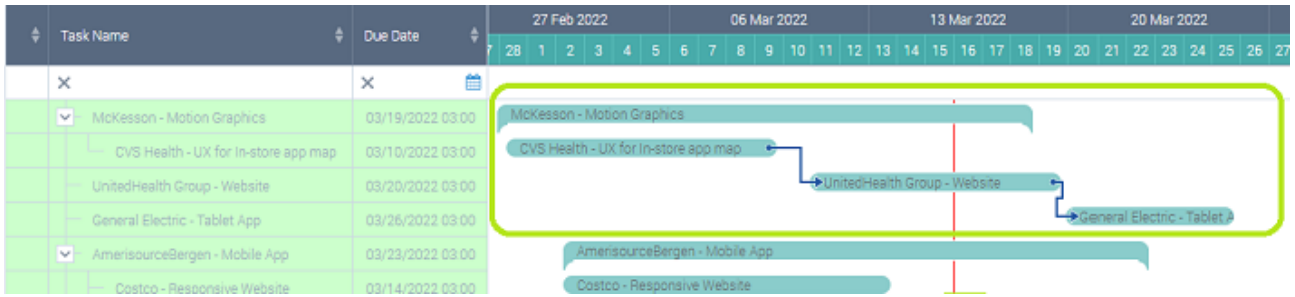
A milestone appears on the chart in its classic view — a rhombus-shaped point.
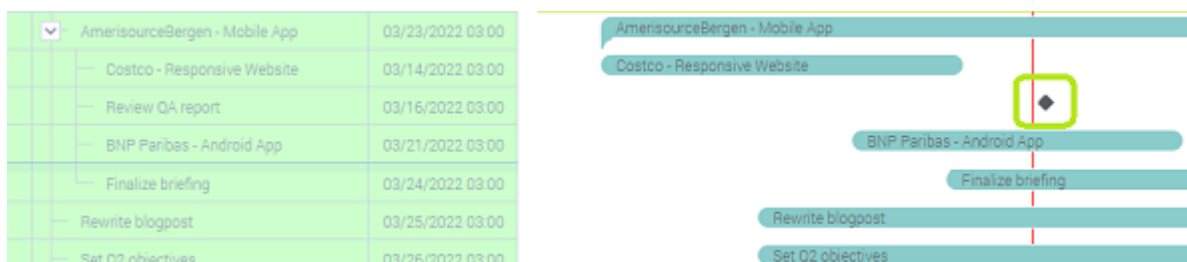
Child Task

Sometimes you need to define parent-child relations between tasks on the Gantt chart. If a **Task list** is chosen as a data source, you can add child tasks. If a task has at least one child task, it is displayed as a summary task.

On the left part summary task appear with an arrow and ability to collapse the child tasks.

To add a child task, click the summary task in the left part of the app and use "+ Child task" button. In this case SharePoint list data source must be also a task list.

Fill in the fields to add the child task.

New Child task

Task Name: Assign QA

Start Date: Mar 24, 2022 11:15:00 PM

Due Date

% Complete

Assigned To

MAR 2022

S	M	T	W	T	F	S
27	28	1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31	1	2

Predecessors

Rewrite blogpost
Set Q2 objectives

Attachments   Add attachment

Save   Cancel

You also can change the position of summary tasks by using "Indent" and "Outdent" button. This way you can create complex strutures of tasks with multiple levels.

Predecessor and Successor

Virto Gantt Chart App for SharePoint Online supports successor/predecessor relations. Predecessor and successor tasks are connected by arrows on the chart. Successor starts after predecessor.

If you add the predecessor to the task edit form, you can add predecessors right on the chart.

Note: *a classic Task list has a predecessor column of the lookup type. If you're using custom SharePoint list, make sure you have added a predecessor column for proper work.*

Resources

You can see assigned Users in the task view form if this column is added to data source view (see the data source settings).

To assign a new user, just double click task and start typing the user's email. The same changes will be done in SharePoint list.

Percent Complete

The percent complete is displayed as different color area of the task body.
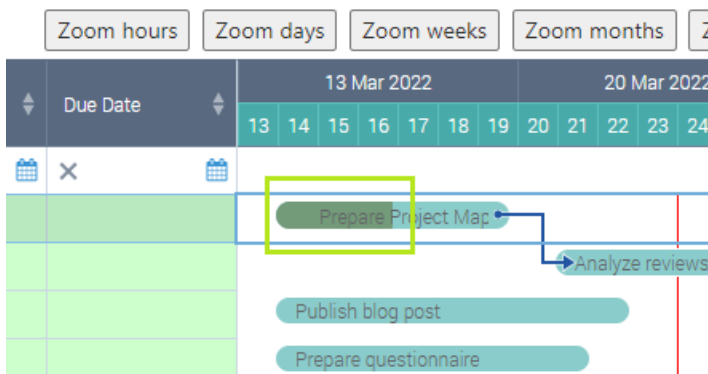
You can change the Percent complete values by drag and drop percent complete icon.