



Virto Resource Manager Web Part for SharePoint 2019, 2016, 2013

Version 4.7.1

User and Installation Guide

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System/Developer Requirements

SharePoint version: 2019

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 2019, Microsoft .NET Framework 4.5.2

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

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 greater, Google Chrome, Firefox, Mozilla

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

Web Part Installation and Activation

Expected Outage

The expected outage time is from 2 minutes to several hours depending on your hardware and number of SharePoint sites. Though we recommend all Virto users to upgrade on a weekend.

Installation

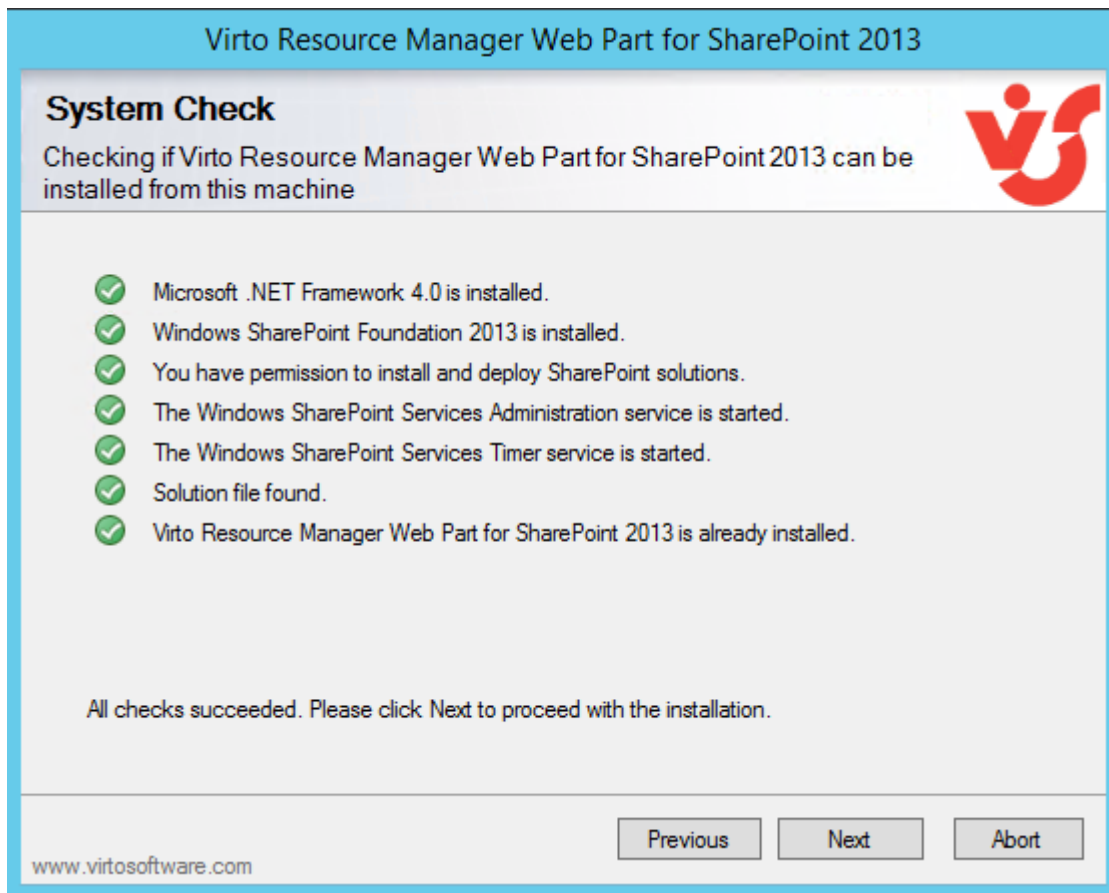
Before you begin, you need to make sure you have access to the server and your account must have the appropriate administrative privileges to install applications.

To access Virto SharePoint Resource Manager Setup program download **Virto.SharePoint.20XX.ResourceManager.zip** file and unzip it. Run extracted Setup.exe file.

The setup wizard window will appear.



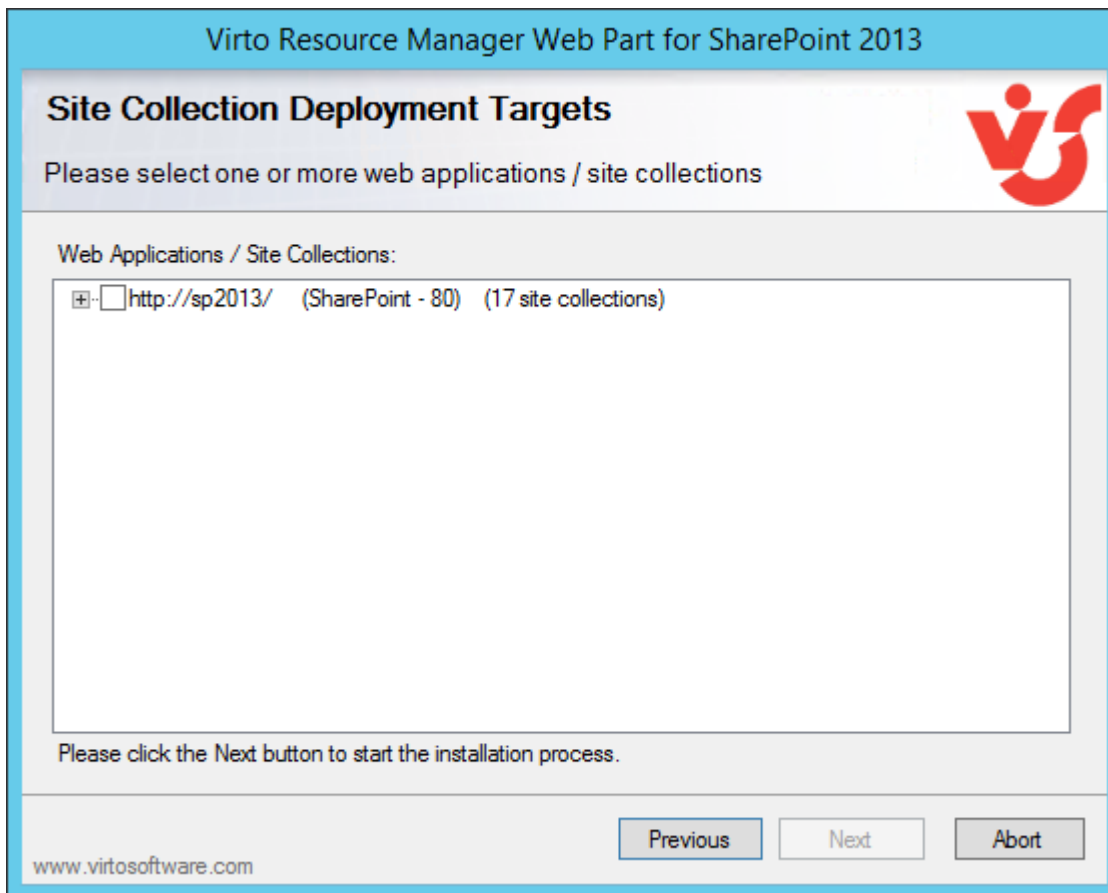
Virto SharePoint Resource Manager wizard performs a system check prior to the installation. All the system checks must be completed successfully in order to proceed with the installation. After the checks have completed, click "Next".



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

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".

Click "Close" to complete the installation.

Note: installation procedure is similar for SharePoint 2013, 2019 and 2016 versions.

SPFx Web Part Installation

To start using Virto Resource Manager web part on modern sites/pages of SharePoint 2016/2019 please do the steps as follows.

- 1) To install Virto Resource Manager web part run Setup.exe file as administrator under the farm administrator account.
- 2) Create App Catalog in your SharePoint if necessary: <https://docs.microsoft.com/en-us/sharepoint/administration/manage-the-app-catalog>.

The "spfx.sppkg" file will be automatically uploaded to "Apps for SharePoint". Now you can add Virto Resource Manager on the modern pages/sites.

Note! Please do not use administrator account to install and activate SPFx web part.

Error “Sorry apps are turned off”: What to Do

If you are trying to install the web part on SharePoint 2019 server and got below error while Adding it to your site:

App Catalog ▶ Add Apps ▶



SPFx Web Part

Details

DESCRIPTION

There is no description available.

SUPPORTED LANGUAGES

Supported languages are not specified.

ADD IT

Sorry, apps are turned off. If you know who runs the server, tell them to enable apps.

VERSION 6.1.0.0

RELEASE DATE January 2019

Rectangular Snip

Sorry, apps are turned off. If you know who runs the server, tell them to enable apps.

Possible Reasons and Solutions

Reason	Solution
Apps are not enabled in your farm	Make sure you have Apps enabled in your SharePoint 2019 farm.
Subscription service is not setup	The first and most probably problem would be the subscription service is not configured in your farm. Please configure it.
App management service is not associated with your web application	Make sure App Management Service Application is associated with your web application where you want to add the SPFx web part.
App Url is not configured	If you have not configured the App Urls. please ensure you have given values to App Domain and App Prefix in your App Store settings.

If after ensuring above solutions, you still have the same error, please [register a ticket](#) to let our technicians analyze the problem.

License Activation

To see full instruction for successful activation of your component, please read our [blog](#).

Upgrading Virto SharePoint Resource Manager

If you already use Virto Resource Manager 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.

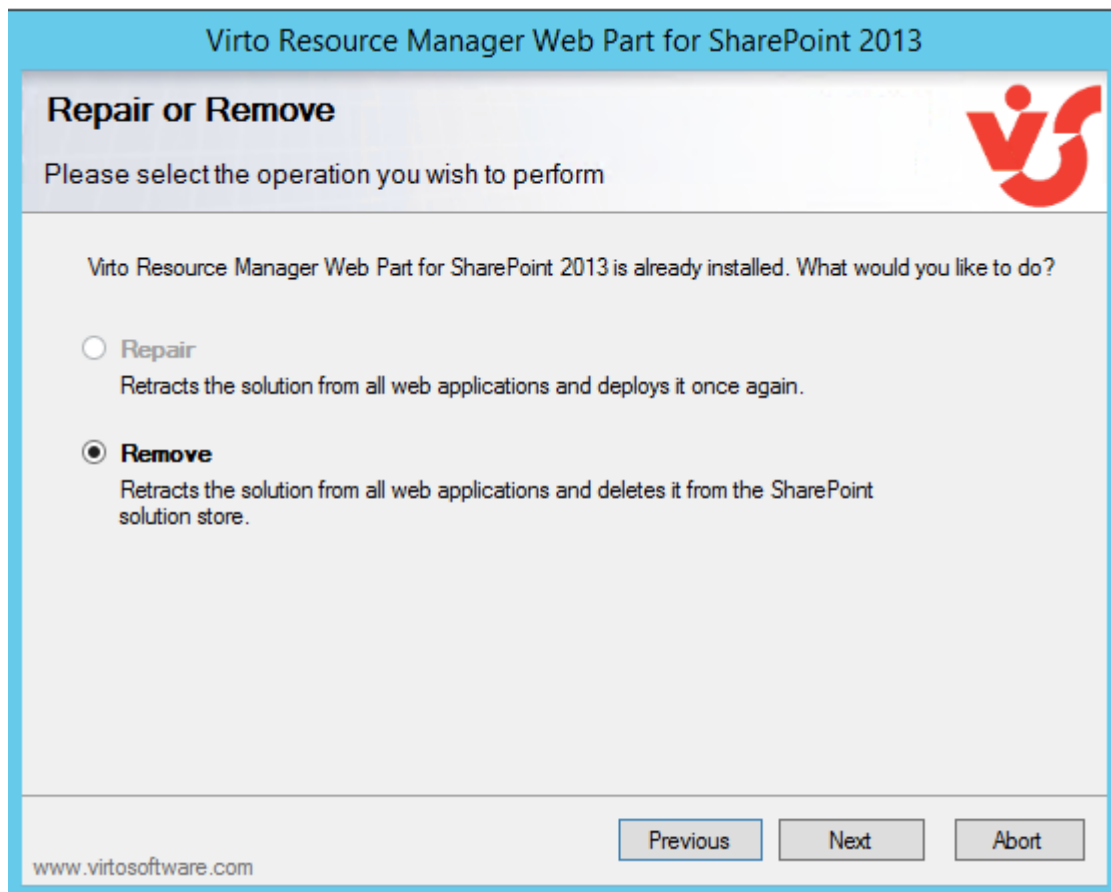
On the step 3 check the box “Upgrade” and click “Next”.

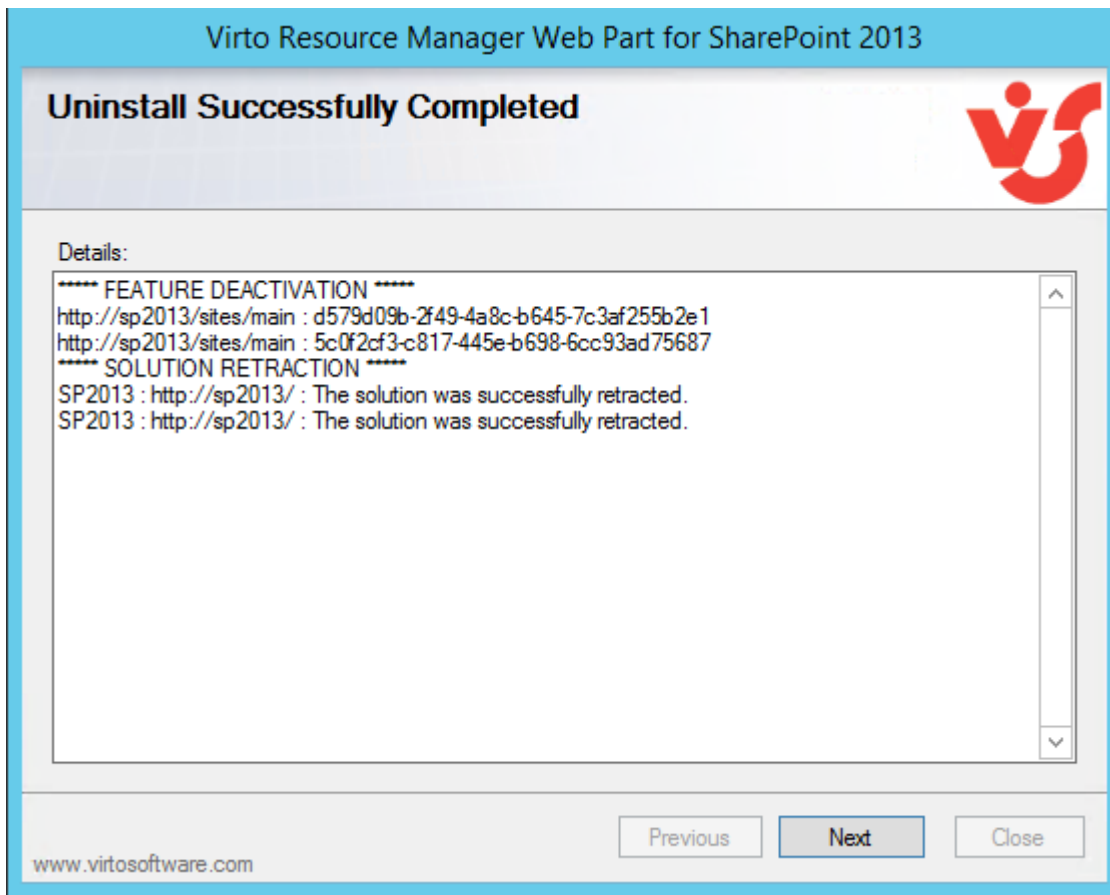
Note: if you had activated the license while installing the previous Virto SharePoint Resource Manager version, you do not need to activate it again.

Uninstalling Virto SharePoint Resource Manager

To uninstall the component:

1. Double click the Setup.exe extracted from downloaded **Virto.SharePoint.20XX.Resource Manager.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”.

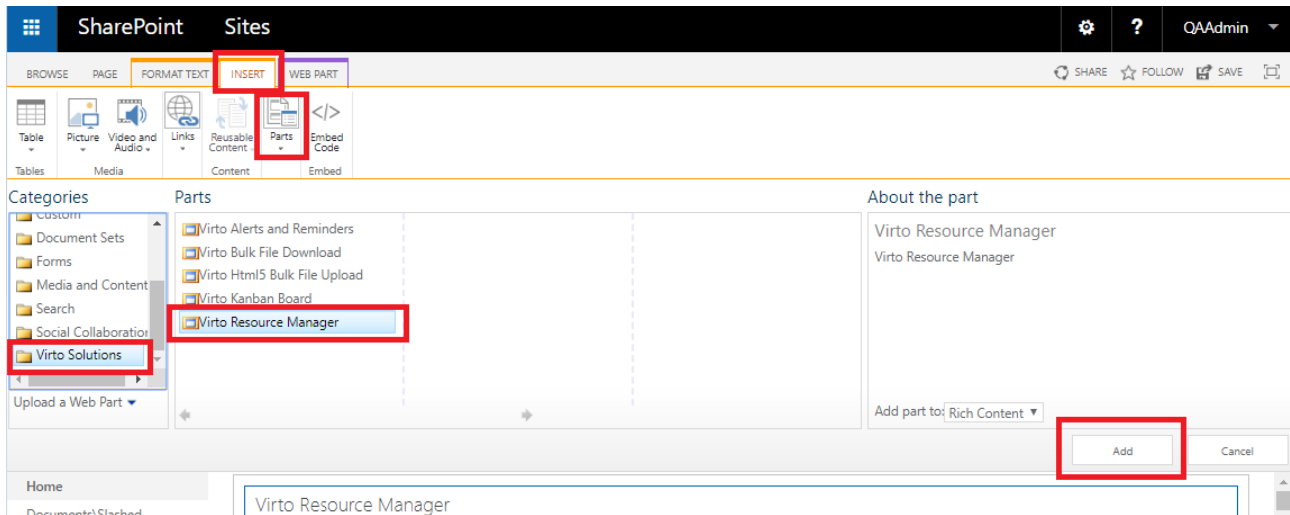




Administration and Usage

Adding web part to a SharePoint site

Go to SharePoint site page where you want to add the web part and open “Edit page”. You will switch to edit mode.



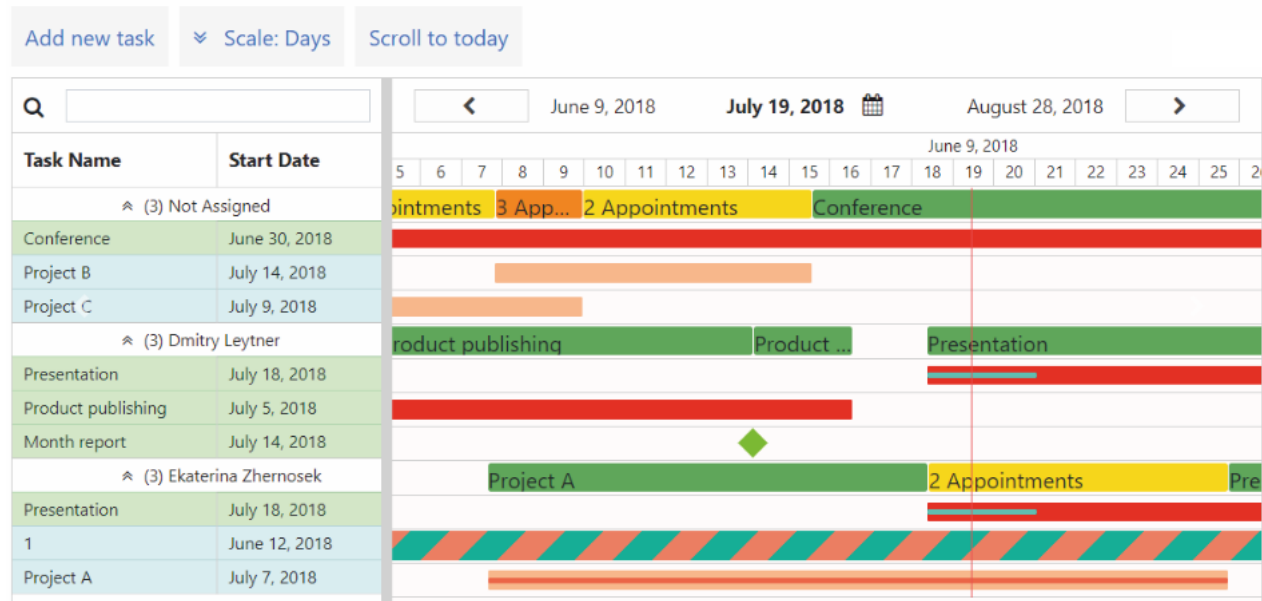
Click “Insert” > “Web Part” > Select “Virtio Solutions” > “Virtio Resource Manager” and add web part to the page.

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, see the “First Start” instruction to create a new chart.

First start

When you have added the web part to a page, you will see a Resource Manager overview and 2 buttons to create your first chart.

Virto chart

License status: **Valid**

“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.

Available charts for Virto Resource Manager for Office 365				
Chart ID	Chart name	Resources	Edit	Delete
4	Demo chart	Demo resource		

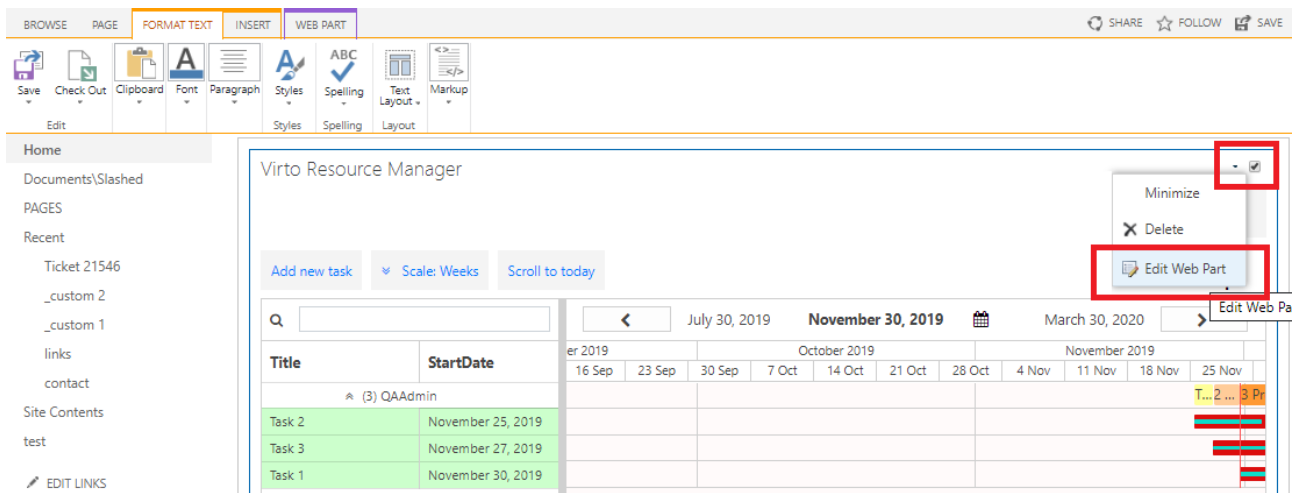
When you add Virto Resource Manager web part to a page, this demo chart will be displayed unless you select another one. Each page can contain a distinct chart (according to webPartID).

The user who added the web part becomes Web Part Administrator status for this web part automatically. He/she may add other administrators.

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

Virto Resource Manager Settings

Click on “Edit web part” in the right upper corner to edit web part.



On the settings page you can create charts. Each chart consists of one or several resources (SharePoint lists). You may add a new resource from the “Available resources” tab or from the quick resource creation right in the “Add new chart” creation.

Create a new resource

Available charts Available resources Users

+ Add new chart

Chart name	Resources	Is default	Edit	Delete
Vacations	1, Holidays, Bdays	✓		
Team tasks	Team tasks			
Project A tasks	Project A			

Open the tab “Available resources”. There 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.

Available charts Available resources Users

+ Add SharePoint resource list

SharePoint resource list name	Edit	Delete
1		
Team tasks		
Project A		
Holidays		
Bdays		

Type a resource name in the new pop-up window. Then select a site URL which contains a data source SharePoint list you want to add as a resource.

Available charts Available resources Users

+ Add SharePoint resource list

Demo resource

Create resource settings

SharePoint resource list name:*
Virtio resource

Type site url:*
http://192.168.0.7

Refresh

Select list:*
Test1

Displayed view:
[Not selected]

Task title field name:*
[Not selected]

Start date field name:*
[Not selected]

End date field:*
Due Date

Percent complete field name:*
[Not selected]

Save Cancel

You may also type another route to a subsite where the source list is located, click “Refresh”, and select a SharePoint list.

Select a list in the dropdown.

Type site url:*
http://192.168.0.7

Refresh

Select list:*
[Not selected]

Displayed view:

Task title field name:*

Start date field name:*

End date field:*

ACalendar
AList
contact
Content and Structure Reports
DocPrimary
DocRelated
Documents\Slashed
Dwnl List Folders
Images
links
Materials

Define a default view that will be used when you open this resource in the chart.

Select list:*

Tasks 001

Displayed view:

All Tasks

Task title field name:*

Task Name

Start date field name:*

Start Date

End date field:*

Due Date

Percent complete field
name:*

% Complete

Resource field name:*

Assigned To

Then you need to match fields for chart with resource list fields. The following fields are required: "Task title", "Start Date", "End Date", "Percent complete", and "Resource".

Task name can be a field of following types: "Text", "LookupMulti", "Lookup".

Start Date and Due Date fields are fields of DateTime type.

Percent complete is a number field.

All fields must not be ReadOnly fields. The following field types not available for selection in current version of Verto Resource Manager: "RelatedItems", "ModStat", "Attachments", "OutcomeChoice".

Any column can be selected as a source column for resources.

Then you can define colors for this resource in chart.

Create resource settings

Background color for resource rows in the left chart part*

Task color:

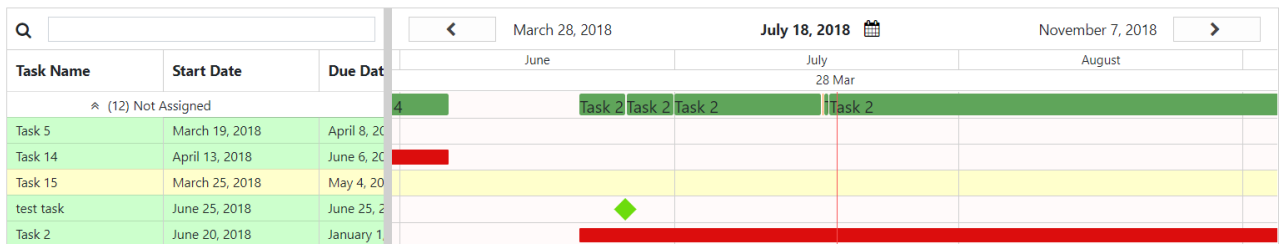
Progress bar color:

Milestone color:

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

R G B

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



Now, select fields to be displayed in the left part of chart, on the task edit/create form and in the task tooltip.

The fields order will be displayed according to the order selected there.

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

Fields for task creating/editing form:

Click Save to add a new resource.

Fields for tooltip:

% Complete	→	Task Name	↑
Assigned To	←		↓
Start Date			
Due Date			
Completed			

✓ Save ✕ Cancel

The new resource will be displayed in the end of resources list.

Available charts	Available resources	Users	Subscription
Add SharePoint resource list			
SharePoint resource list name		Edit	Delete
1			
Team tasks			
Project A			
Holidays			
Bdays			
Virto resource			


Create a new chart


Switch to tab “Available charts” to add a new chart.


There you can see the list of existing charts.

“Is default” checkbox means the selected chart will be displayed on web part’s site pages without selected chart.

Click “Add new chart”.

 Available charts

 Available resources

 Users











 Add new chart

Chart name	Resources	Is default	Edit	Delete
Vacations	1, Holidays, Bdays			
Team tasks	Team tasks			
Project A tasks	Project A			

Type a name of new chart.

Then add one or several resources to be displayed in this chart. You may also create a new resource, using “Add SharePoint resource list” button (See the chapter “Create a new resource”).

It is not possible to save a chart without any resources included.

Create chart

Resource Utilization chart name:*

Virto chart

+ Add SharePoint resource list

Available resource lists			Selected resource lists		
SharePoint resource list name	Edit	Delete	SharePoint resource list name	ReadOnly	Edit
1					
Team tasks					
Project A					
Holidays					
Bdays					
Virto resource					

You may edit and delete resources and make a selected resource ReadOnly for users. If the chart is “ReadOnly”, the “Add new task” button will be removed from the chart view.

+ Add SharePoint resource list

Available resource lists			Selected resource lists		
SharePoint resource list name	Edit	Delete	SharePoint resource list name	ReadOnly	Edit
Team tasks			Virto resource	<input type="checkbox"/>	
Project A			1	<input type="checkbox"/>	
Holidays					
Bdays					

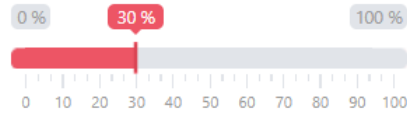
Now, you have to define a default splitter position for this chart. This is a place of divider between the left (table) part of the chart and the right (timescale) part of the chart. You can always change this proportion on chart view with drag-and-drop feature.

You can select a default timescale for chart. The following scales are available:

- Days;
- Hours;
- Quarter Days;
- Weeks;
- Thirds of Months
- Months
- Quarters

- Half Years

Splitter position (in %):



Default timescale:

Weeks

Startday of week:

List of users or groups for read access:

List of users or groups for edit access:

Days
Hours
Quarter Days
Weeks
Thirds of Months
Months
Quarters
Half Years

You can also select the start day of the week for your scales (Sunday or Monday).

If you tick “Collapse resource lines by default” box, the chart view will contain the resources with collapsed appointments’ lines to save the space on a page. You can click on the resources to display the full information.

Default timescale:

Weeks

Startday of week:

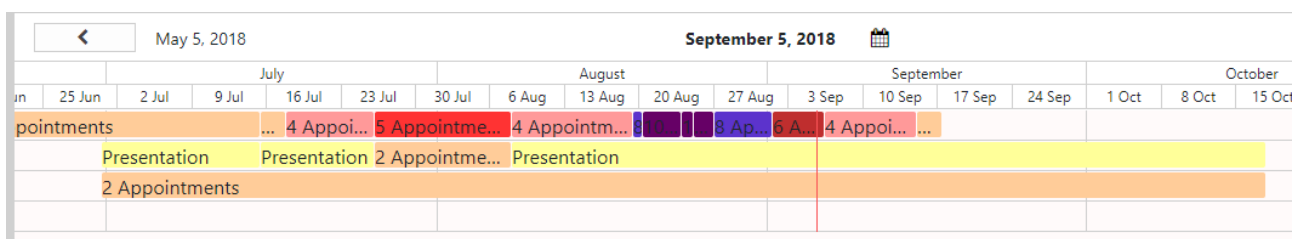
Monday

Collapse resource lines by default:

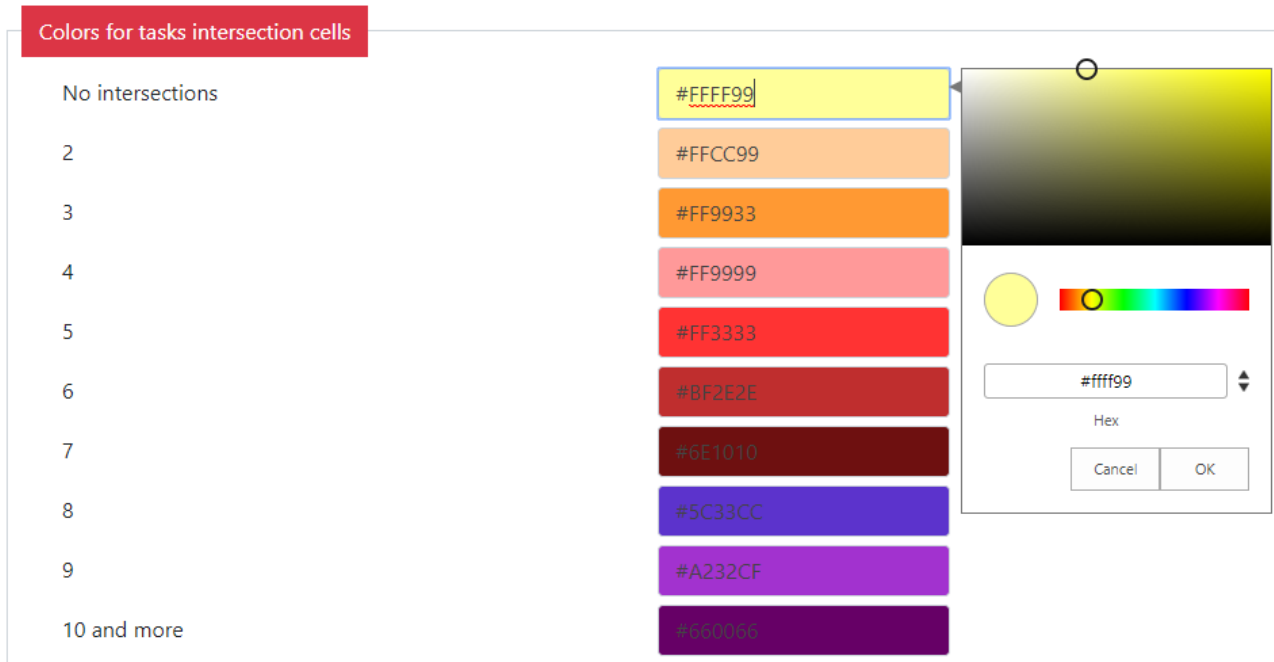


Colors for tasks intersection cells

You can assign your own colors for appointment intersections. It is a color scheme on the chart timeline, which helps to distinguish with colors the number of tasks overlay.



You can assign your own colors for this cells.



You can set Read Only and Edit permissions for this chart for users and user groups.

All users with Edit permission have also Read permission as well.

List of users or groups for read access: [Dmitry Leytner](#) x [Resource utilization Memb...](#) x

List of users or groups for edit access: [Alex Linn](#) x

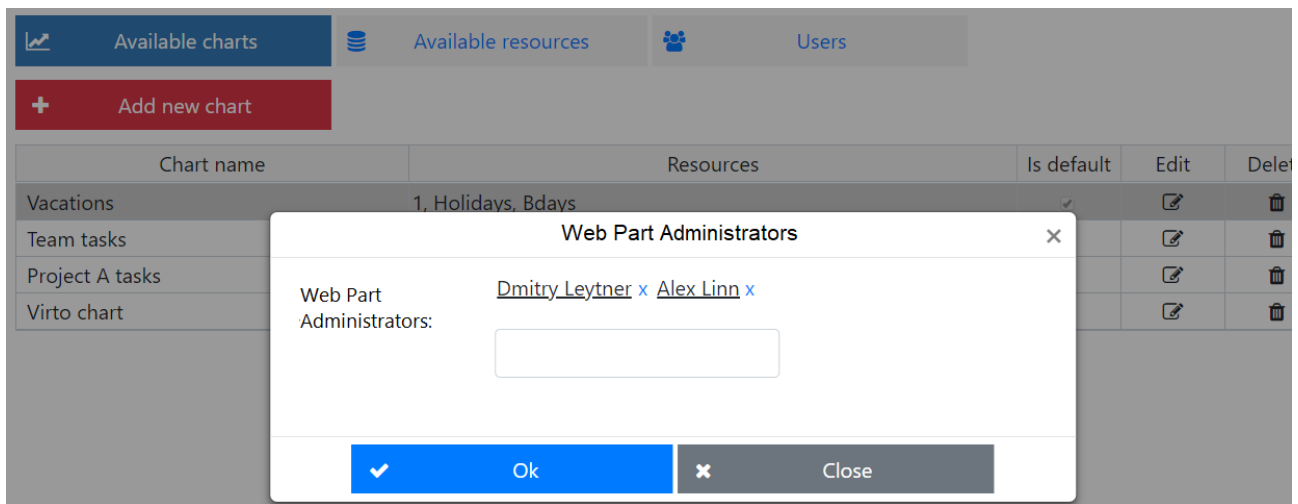
☒ Save ☐ Cancel

Click "Save" to add chart.

Users

This tab contains a list of web part administrators with full permission. Web part administrators can:

- edit charts and resources (Users can manage lists which are available for them according to their access level predefined in SharePoint permissions);
- set default chart;
- edit subscription;
- edit Web Part Administrators list.

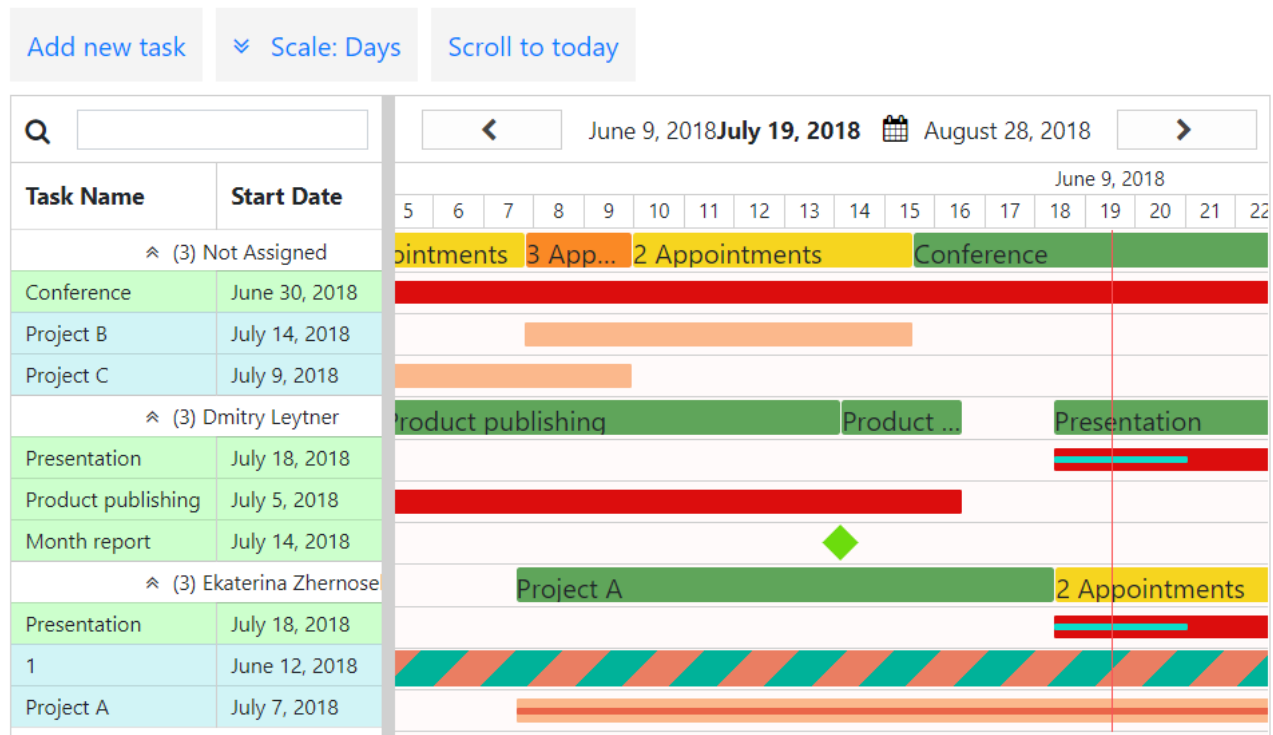


The user who added the web part becomes Web Part Administrator status for this web part automatically. He/she may add other administrators.

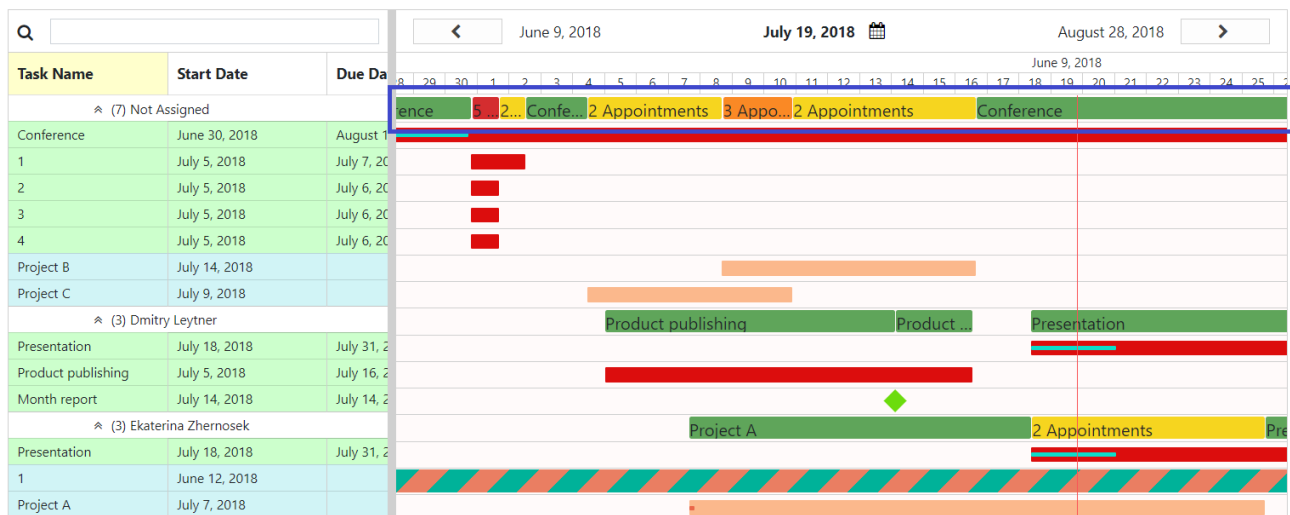
Using Virto Resource Manager Web Part

When the web part is adjusted, it may look like follows:

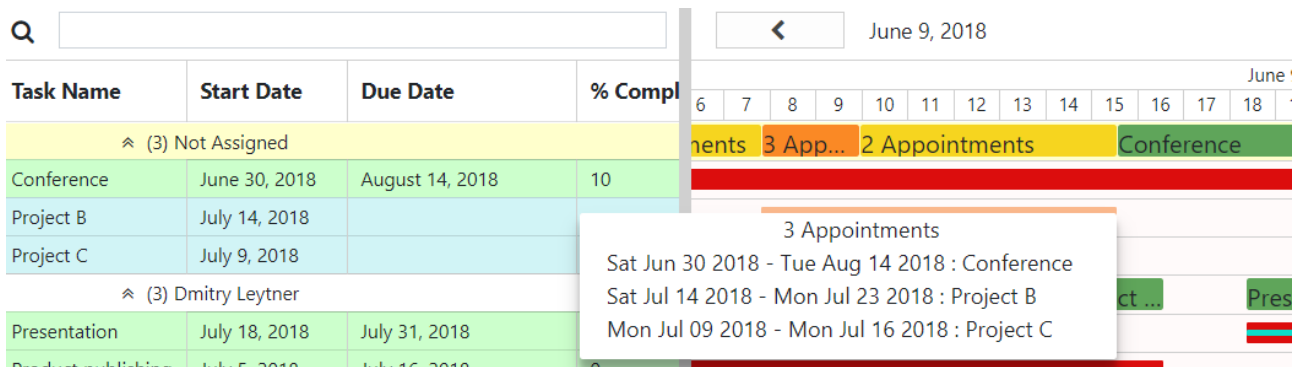
Virto chart



The left part includes list of resources (users, task names, date and time, etc.) and the right part shows the timescale with amount of tasks planned for a single period with colors (green, yellow, orange, red). For instance, if one task is planned for a period, this period is shown as green; if two tasks are planned – yellow; 3-4 tasks are highlighted with orange, and more tasks are red. This helps managers to edit the plan according to resource utilization.



You may hover the mouse point on the colored zone to see a tooltip with tasks planned.



A task containing an error (for example, its due date is less than start date) is colored with green and pink stripes.



Timescales

You may select a required timescale using dropdown menu.

The following options are available: "Hours", "Quarter Days", "Days", "Weeks", "Thirds of Months", "Months", "Quarters", "Half Years".

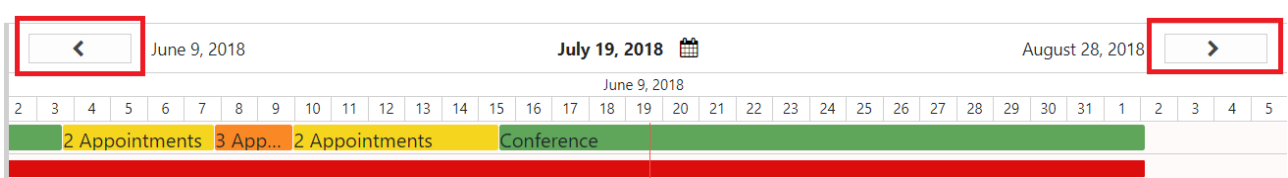
Virto chart

[Add new task](#)
▼ Scale: Days
[Scroll to today](#)

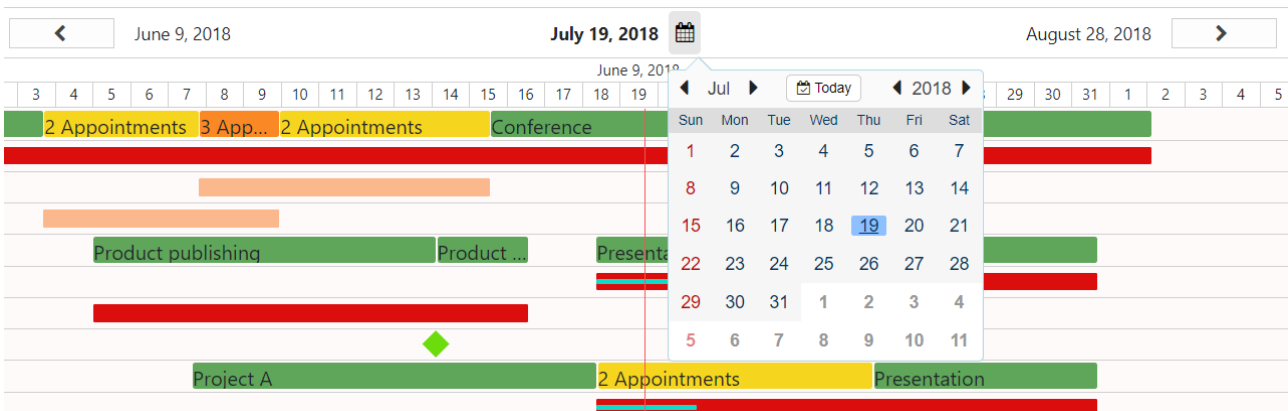
Hours
Quarter Days
Days
Weeks
Thirds of Months
Months
Quarters
Half Years

Task Name	% Complete
(3) N	2 Appoin
Conference	2018 10
Project B	
Project C	
(3) D	Pro
Presentation	18 20
Product publishing	18 0
Month report	18 0
(3) E	
Presentation	July 18, 2018 July 31, 2018 20

Use navigation arrow buttons to switch back and forth in timeline.



Or select a date to navigate to in the date picker.



Virto Resource Manager web part supports scrolling with mouse wheel in the Gantt chart, which is equivalent to pressing an arrow key or to clicking the arrow button on a scrollbar.

Creating a Task

Virto SharePoint Resource Manager allows users to create tasks right in the web part. The same changes will be done in a SharePoint list.

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

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

Add new task Scale: Days Scroll to today

Q

Task Name

(3) N

Conference

Project B

Project C

(3) D

Presentation

Product publishing

Month report

(3) E

Presentation

1

Project A

Create task

Resource list name: Team tasks

Title

Start Date 07/19/2018

Due Date

%

Userfield

Category

Priority

Status Not Started

Version

✓ Save

✕ Cancel

You have to select a resource list where this task will belong to. Then add a task name and fulfill the fields of edit form (you can select these fields in Resource settings).

Created task will appear in the chart.

Virto SharePoint Resource Manager 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 sorting and filtering

You can use a filter bar to show only required tasks.

Q	<input type="text" value="pr"/>		
Task Name	Start Date	Due Date	% Complete
⌵ (3) Not Assigned			
Project B	July 14, 2018		
Project C	July 9, 2018		
⌵ (2) Dmitry Leytner			
Presentation	July 18, 2018	July 31, 2018	20
Product publishi...	July 5, 2018	July 16, 2018	0
⌵ (3) Ekaterina Zhernosek			
Presentation	July 18, 2018	July 31, 2018	20

You may sort tasks in ascending and descending order by clicking on a column in the left part of chart. For example, you can start tasks by name in alphabetical order or according to Start Date.

Q			
Task Name	Start Date	Due Date	% Complete
⌵ (8) Not Assigned			
Conference	June 30, 2018	August 14, 2018	10
1	July 5, 2018	July 7, 2018	0
2	July 5, 2018	July 6, 2018	0
3	July 5, 2018	July 6, 2018	0
4	July 5, 2018	July 6, 2018	0
Project C	July 9, 2018		
Project B	July 14, 2018		
3	July 18, 2018		
⌵ (3) Dmitry Leytner			
Product publishi...	July 5, 2018	July 16, 2018	0
Month report	July 14, 2018	July 14, 2018	0
Presentation	July 18, 2018	July 31, 2018	20
⌵ (3) Ekaterina Zhernosek			
1	June 12, 2018		
Project A	July 7, 2018		
Presentation	July 18, 2018	July 31, 2018	20

“Scroll to Today” action

If you need to scroll chat view to current date, click “Scroll to Task”.

Virto chart

Add new task

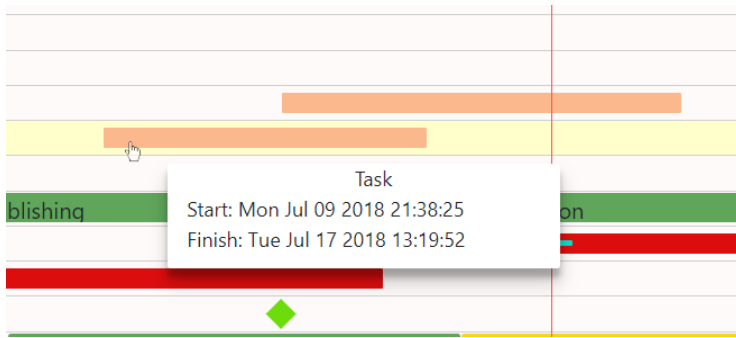
⌵ Scale: Days

Scroll to today

Q			
Task Name	Start Date	Due Date	% Complete

Moving Tasks

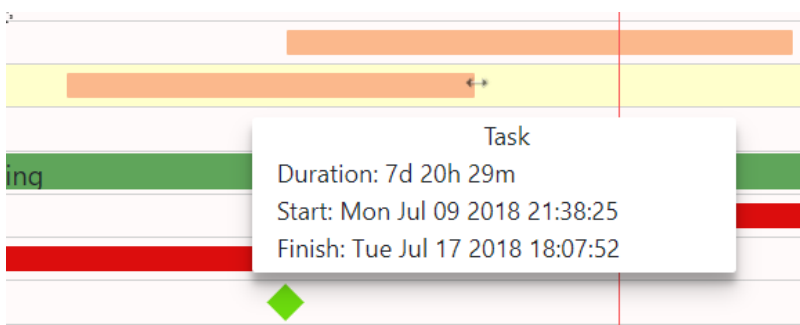
You can easily change task dates by simple moving. Use mouse to move tasks to other dates by simple drag and drop feature.



Start and end dates of this task will be changed. The same changes will be done in a SharePoint list.

Changing Task Duration

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



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

Changing Percent Complete

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

