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Gantt Chart

by Inforge

User manual of Gantt Chart App

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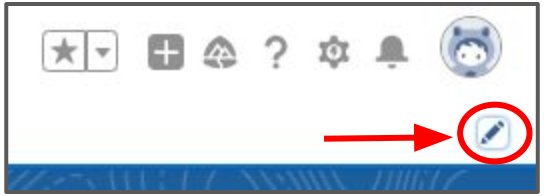
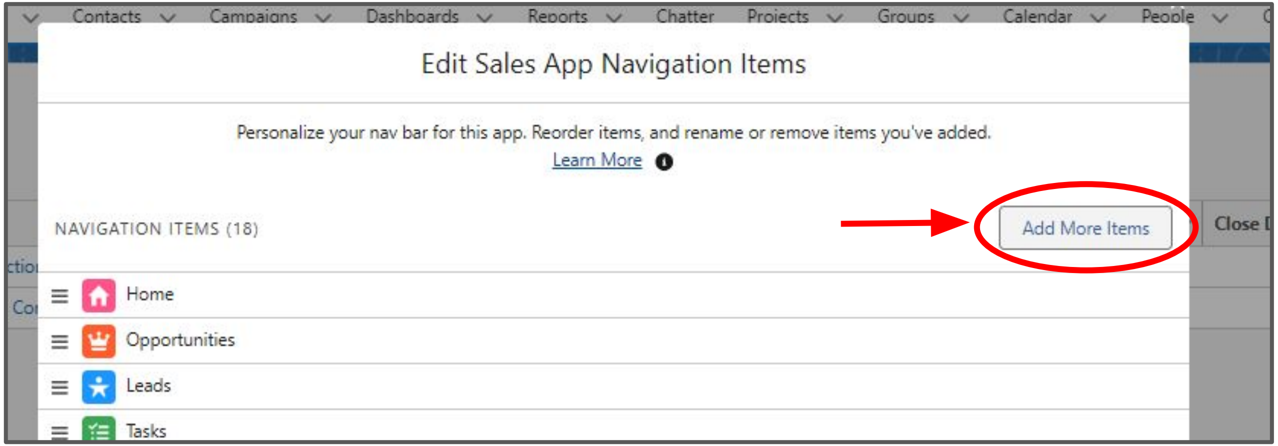
To use the application, we need to add it to the desired App. Click on the pencil in the upper right margin, below our User. And the following screen will appear.



Click in “Add More Items”



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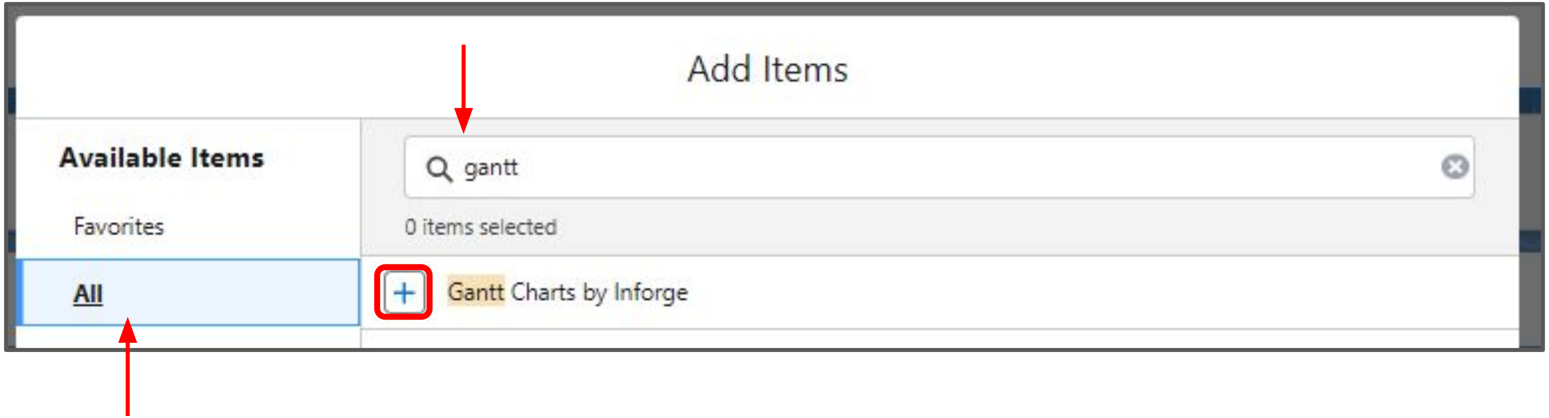
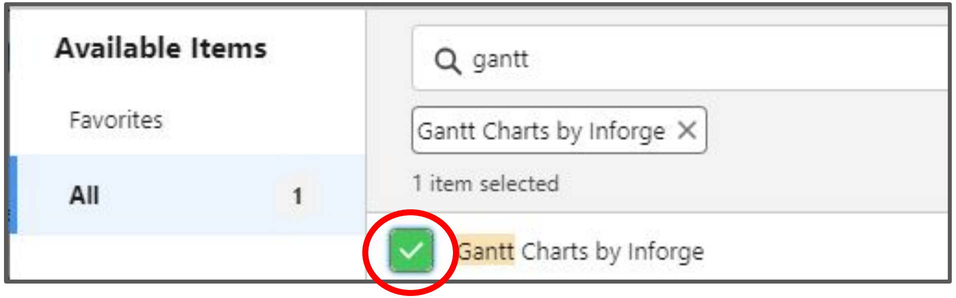
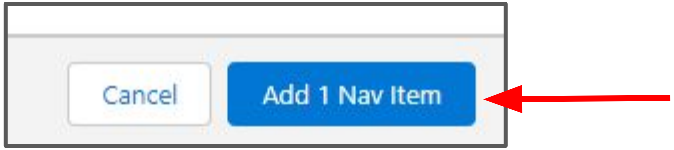
In the left column click on "All" and then in the search, type "Gantt". Our app "Gantt Charts by Inforge" will appear, click on "+" . Then it will show us a screen with all the visible tabs and finally we will be able to see ours.



When we click on "+", it will appear with a green check, this means that it is added. Finally we click on "Add 1 Nav Item" which is located below.





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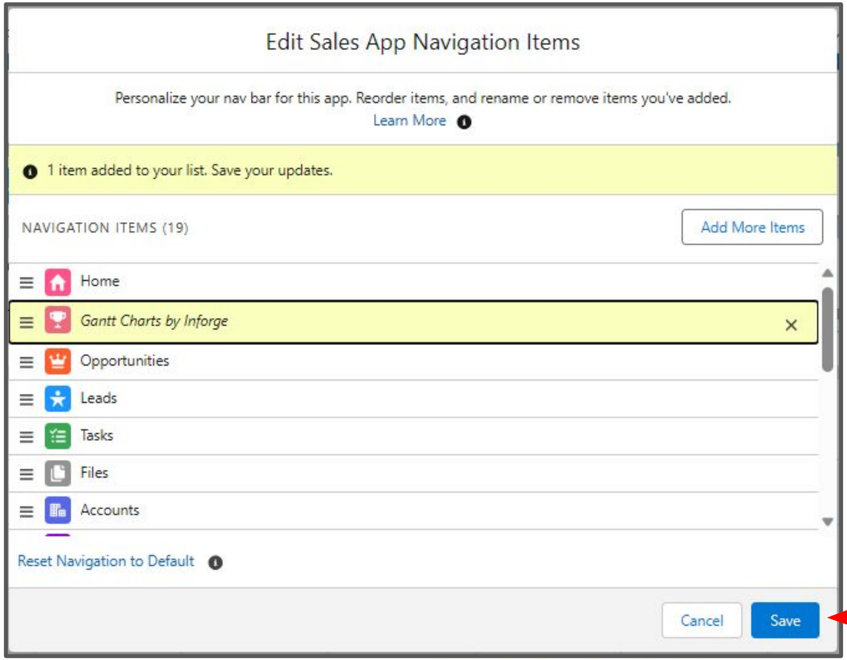
Once added in the tabs, we can drag and drop it to the desired position. In this case we will show it in the second position. Then click "Save" to save the changes.



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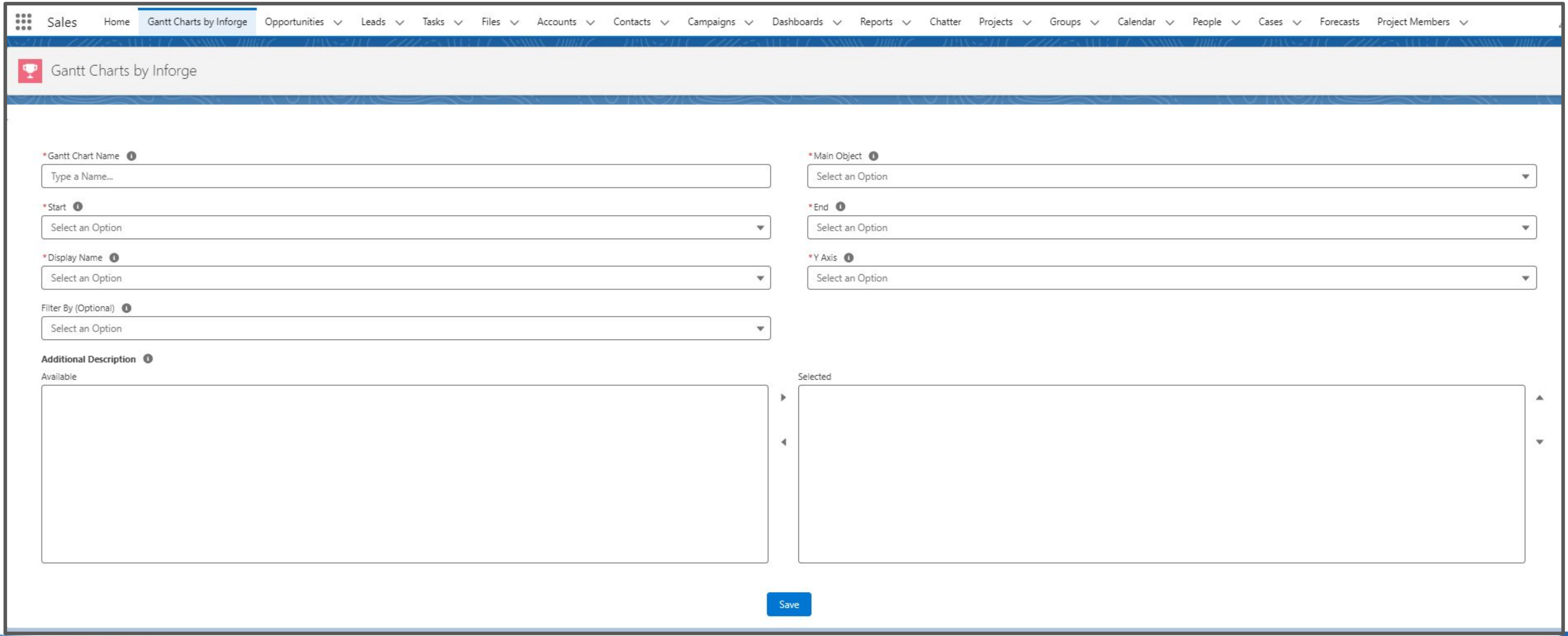
Click on the tab and will show the App



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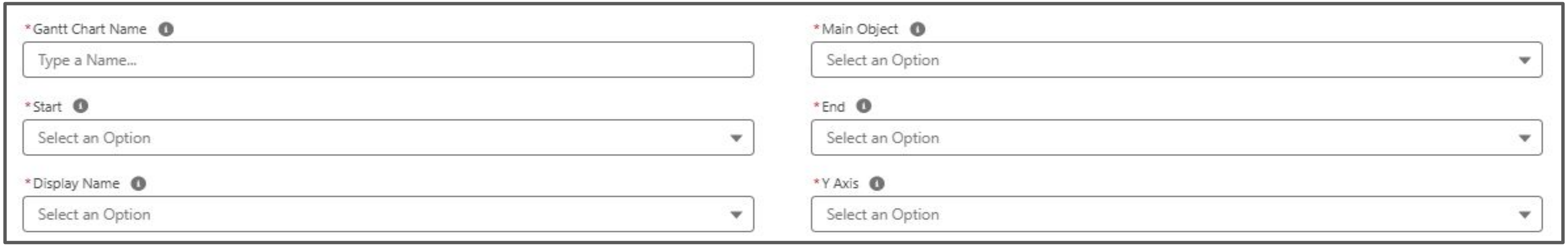
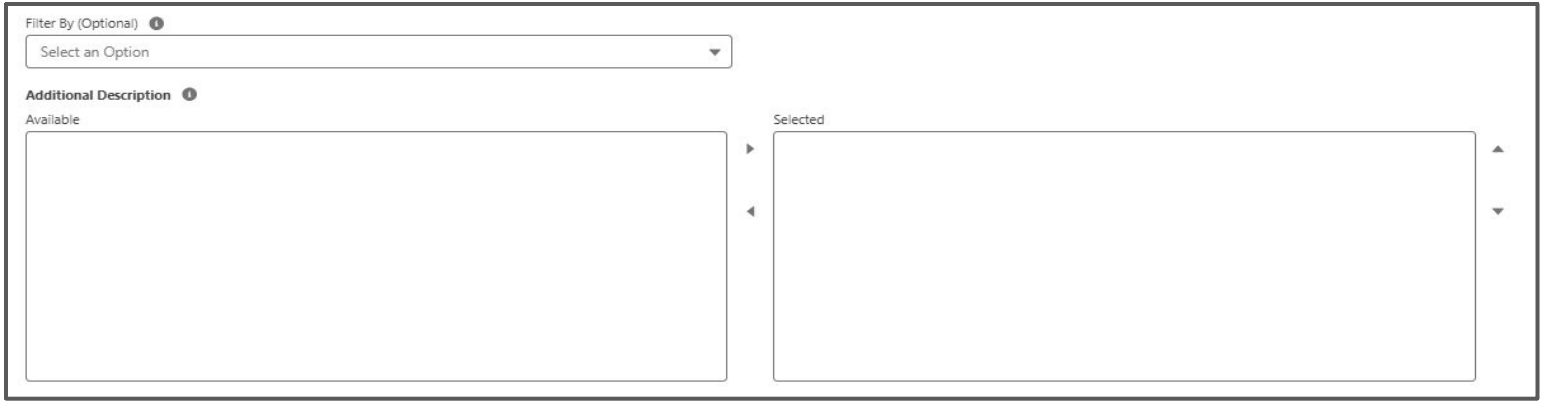
Create Gantt Chart



Here we are going to create our first Gantt Chart. We will have to fill in the required fields.

- **Gantt Chart Name:** The 'Name' field is used to identify the application. It helps in distinguishing one application from another within the system.
- **Main Object:** The 'Main Object' is the object from which we are analyzing the data.
- **Start:** The 'Start' field requires a date or datetime entry. It signifies the starting point of the record, assisting in identifying when the particular record commenced.
- **End:** The 'End' field, similar to the 'Start' field, requires a date or datetime entry. It indicates the conclusion or end point of the record, aiding in determining when the record ended.
- **Display Name:** The 'Display Name' field defines the name of the chart when a user hovers over the data. It provides additional information about the data represented in the chart.
- **Y Axis:** The 'Y Axis' field determines the vertical axis in the application. Each record is displayed on the corresponding row within this axis.

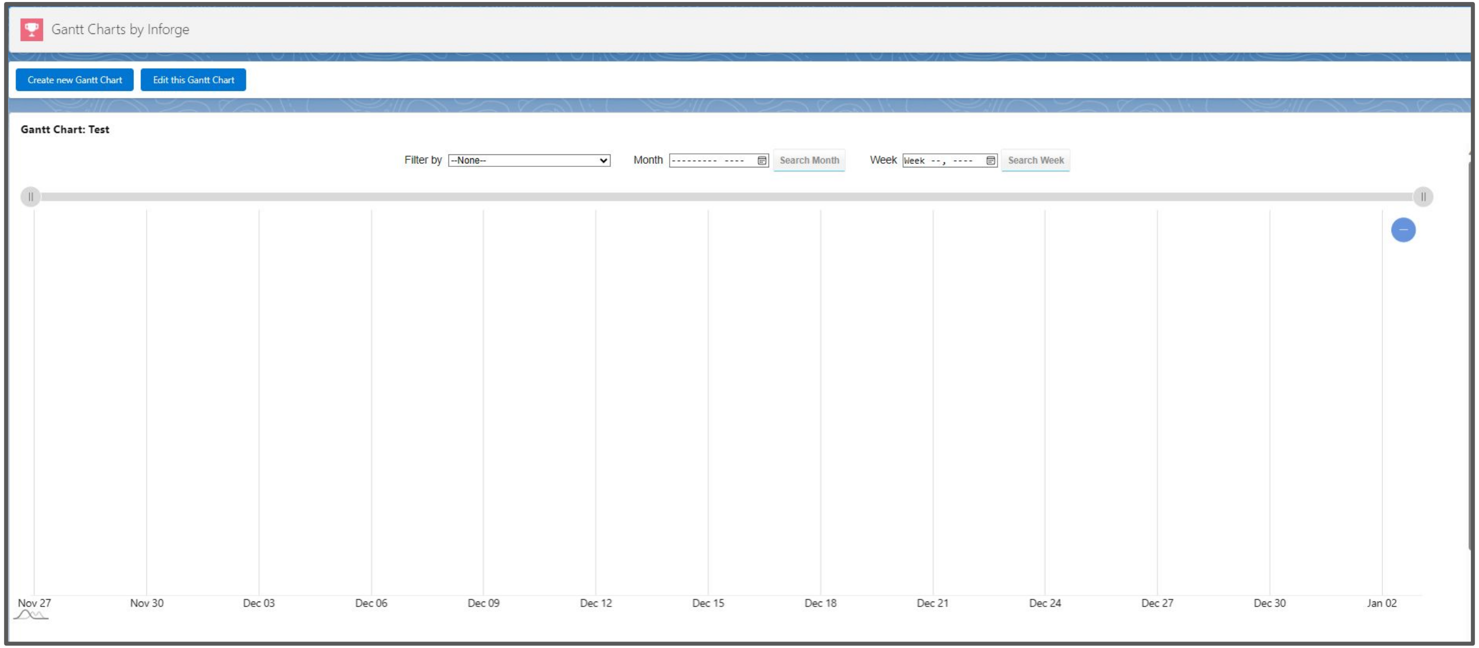
Create Gantt Chart



These are additional fields not required.

- **Filter by:** The 'Filter by' field allows you to apply a specific filter to the records that will be displayed. It dictates the values that will appear in the 'Filter by' picklist. For example, the main object may be Contact, and the 'Filter By' can be Account, so the Gantt Charts only show contacts from a specific account.
- **Description:** The 'Description Field' is optional. You can select the fields that will be displayed when hovering over the chart. It offers additional insights into the data represented in the chart.

Once we create our first Gantt chart, we click "Save" and we will be redirected to the App.



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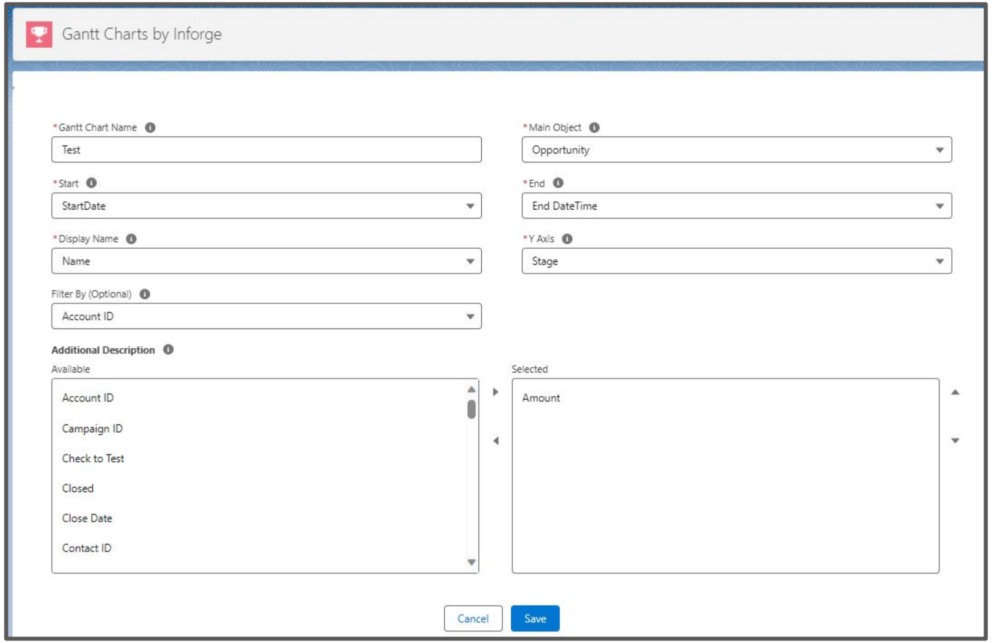

Two new buttons now appear. "Create new Gantt" and "Edit This Gantt Chart".

- Create new Gantt Chart" will redirect us to the previous screen to create a new Gantt Chart.

- In "Edit this Gantt Chart", we will be able to modify our current Gantt Chart, we can change the fields of the Start, Y axis, or any modification we want. If we do not want to modify, to not save the changes we click on "Cancel".

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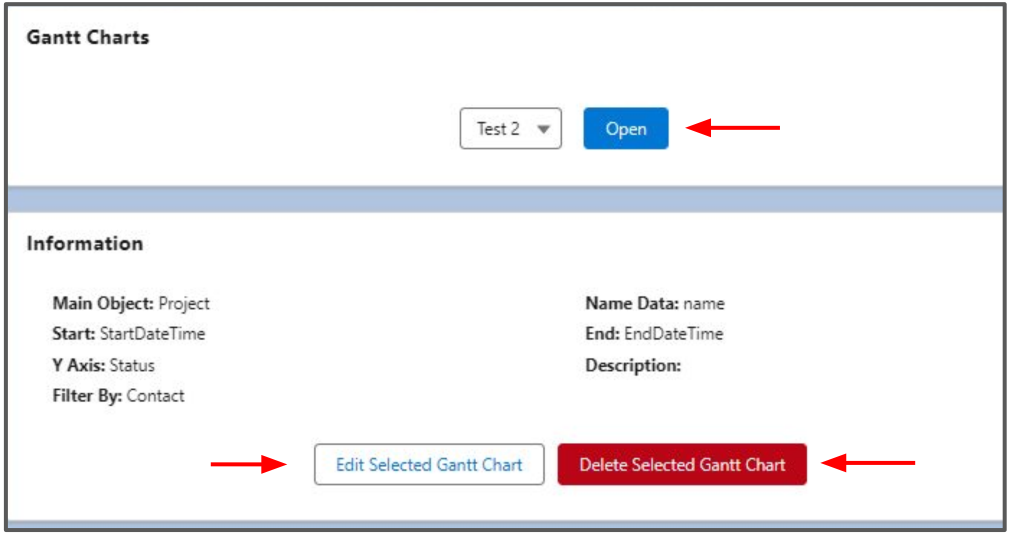
If we create another gantt chart, we will be redirected to a new view where we can choose between the number of Gantt Charts created.
In this part we will be able to see how our Gantt chart is set up and all its information.



- **Open Button:** In this button, select the option that is selected and it will take us to the App to use this Gantt Chart.
- **Edit Selected Gantt Chart:** This button allows us to edit the selected gantt chart.
- **Delete Selected Gantt Chart:** This button is used to delete the selected Gantt Chart.

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After having two or more Gantt Charts, a new button "Choose another Gantt Chart" will appear.

If we select "choose another Gantt Chart we can go to the previous screen and choose among the different Gantt Charts that have been created.

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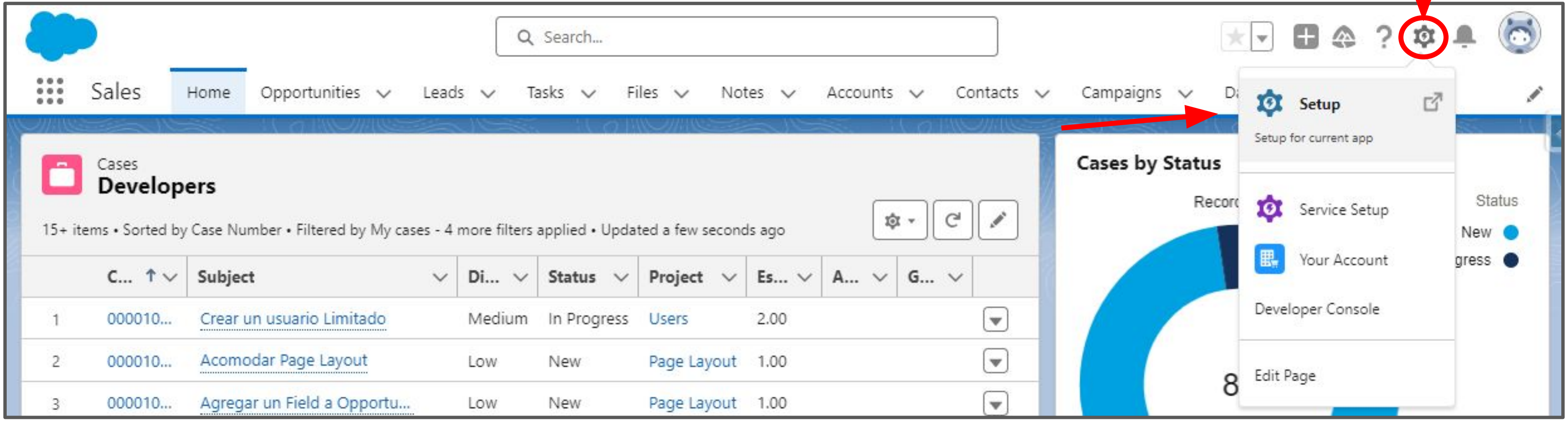
Example (Opportunities)

If we want to see the opportunities we have in a specific month or week, we can set our Gantt chart to show this data according to the Stage they are in at the moment. It is also possible to filter them according to the account they belong to. In addition, if we want more information, for example, the amount, probability and Expected Amount, we can add it in the “Description” field and it will be shown when we pass the mouse over the Record.

A fact to keep in mind is that our opportunities need to have a start and end date, this is so that our Gantt Chart knows in which time interval they are.

We will take advantage of the fact that Opportunity has a “Close Date” and we will create a "Start Date" for a better example.

Inside Salesforce, click on the setting icon, then click on "Setup".



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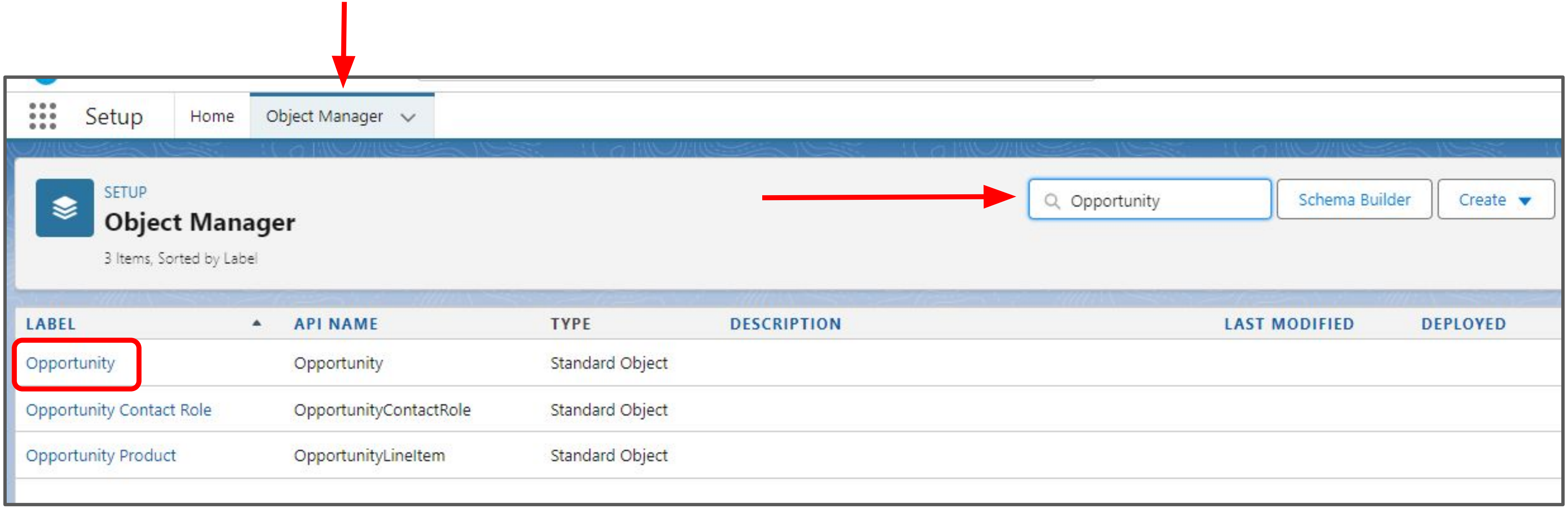
Inside Setup, click on "Object Manager" and in that section, in the search engine, type "Opportunity" to search for our "Main Object". And click on "Opportunity".



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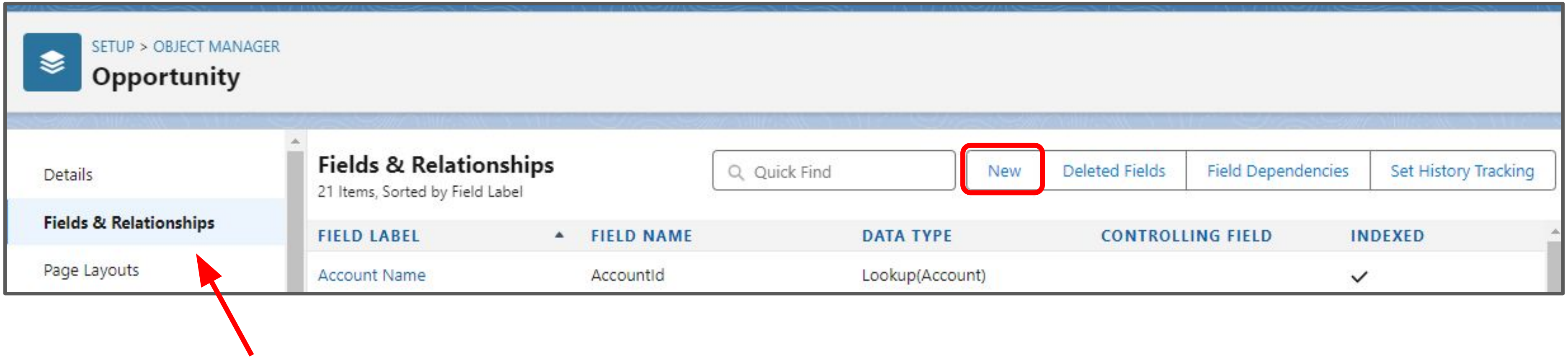
Once we are in the "Opportunity" object, we go to the "Fields & Relationships" section and then click on "New".



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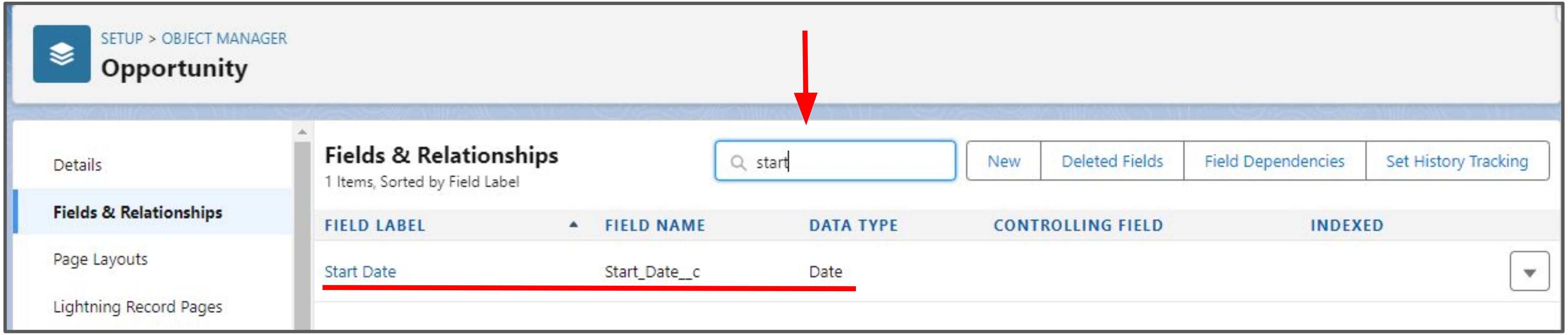
1. Data type: Date and click “Next”
2. Field Label: “Start Date” and Field Name auto populates, then click “Next”
3. For our purpose, let's check “Visible” and checks all the profiles rows.
4. Click “Save”.

If we search the new field will be appear.



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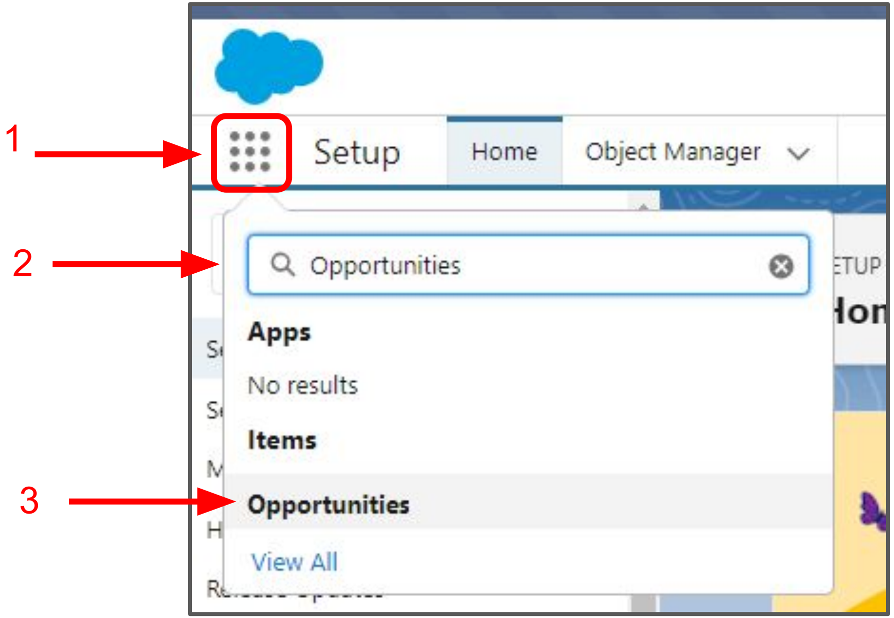
Now, we are going to modified the opportunities records. Click on the launcher icon and type on the search bar “Opportunities”. After, click on the “Opportunities” suggestion and it will take you to the Opportunities List.



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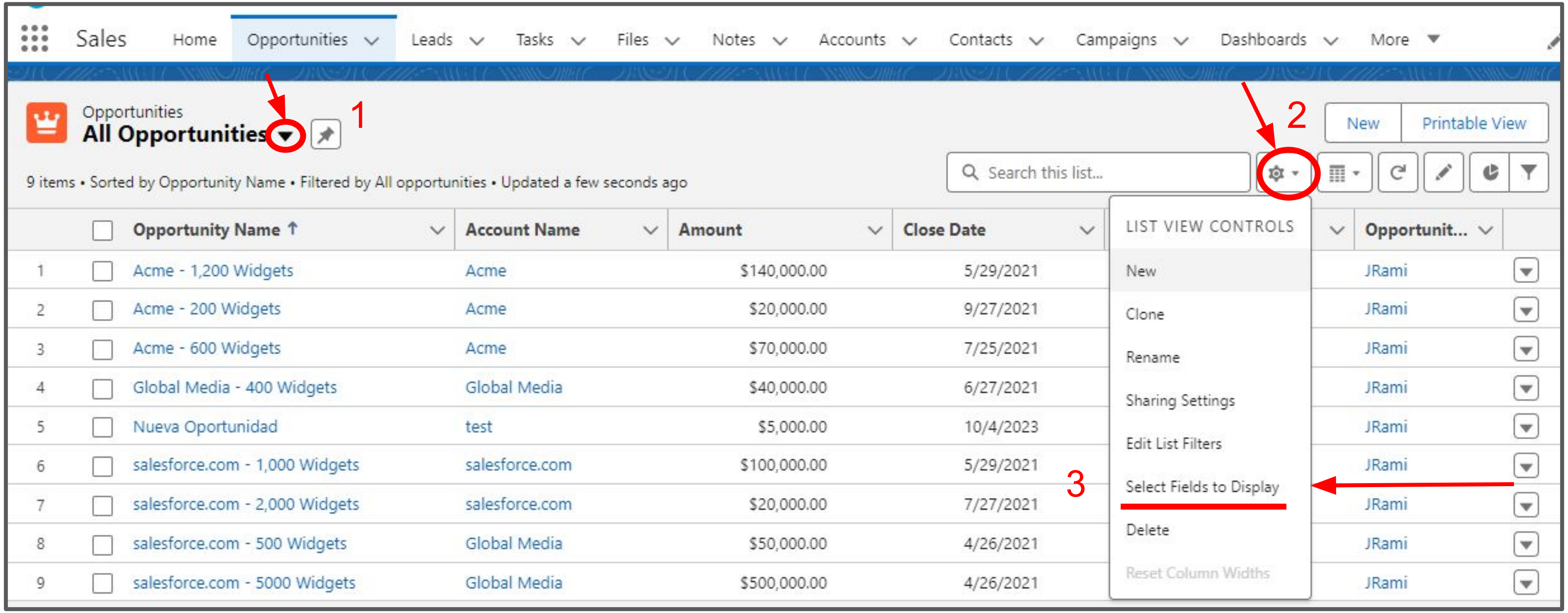
Probably when we are in the Opportunities list, it will show “Recently Viewed” List, we need to show all our Opportunities. So, click on the icon ▾ and select “All Opportunities” List and will show like this. After that, we have to add “Start Date” field to the list, this is so that we can modify the records we want to show in the Gantt Chart.
Click on the Setting Icon and it will display all the options, click on “Select Fields to Display”



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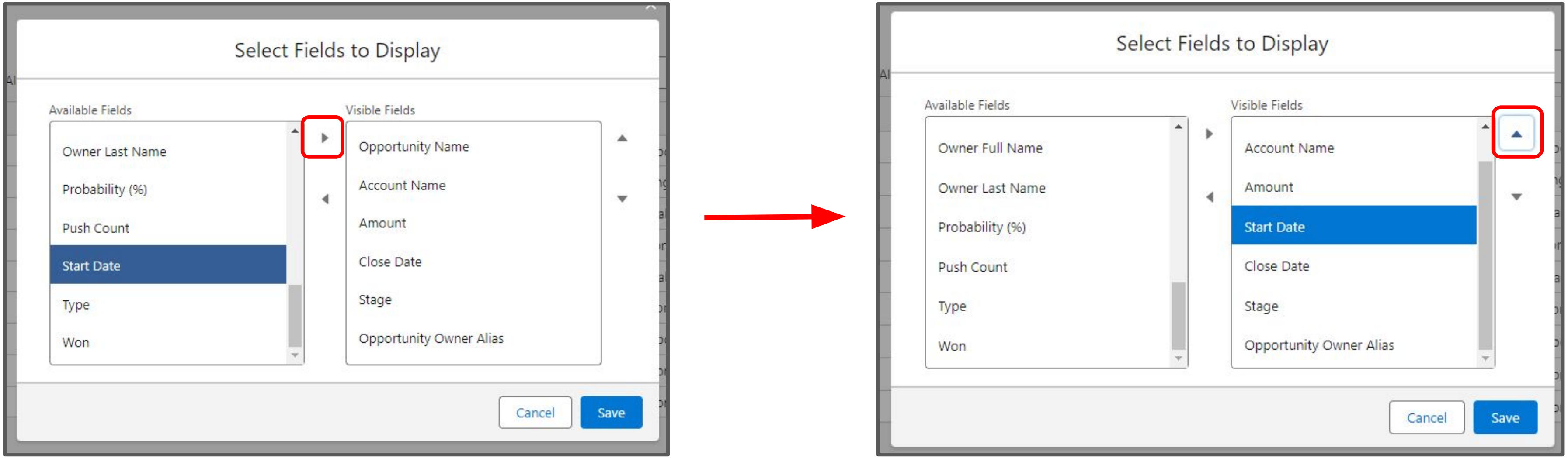
In this section, will show all the Opportunities fields that are available and visible in the List. We have to move "Start Date" from "Available" to "Visible".

First search "Start Date" in the Available Fields, click it and click to move to "Visible Fields". After that, we can move up and down in the List. So, search "Start Date" in the Visible Fields, click on and move it above "Close Date". Click "Save"



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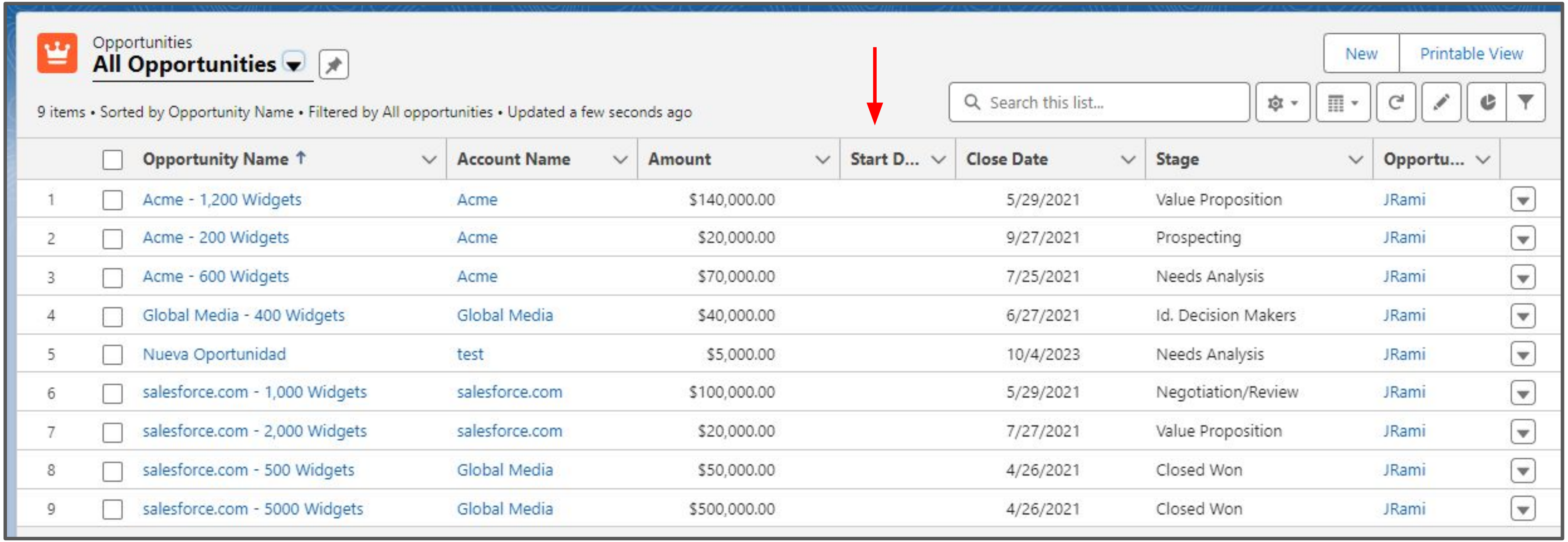
Then “Start Date” will show next to “Close Date”, now we can edit the records that we want to display in our Gantt Chart.



	Opportunity Name	Account Name	Amount	Start D...	Close Date	Stage	Opportu...
1	Acme - 1,200 Widgets	Acme	$140,000.00		5/29/2021	Value Proposition	JRami
2	Acme - 200 Widgets	Acme	$20,000.00		9/27/2021	Prospecting	JRami
3	Acme - 600 Widgets	Acme	$70,000.00		7/25/2021	Needs Analysis	JRami
4	Global Media - 400 Widgets	Global Media	$40,000.00		6/27/2021	Id. Decision Makers	JRami
5	Nueva Oportunidad	test	$5,000.00		10/4/2023	Needs Analysis	JRami
6	salesforce.com - 1,000 Widgets	salesforce.com	$100,000.00		5/29/2021	Negotiation/Review	JRami
7	salesforce.com - 2,000 Widgets	salesforce.com	$20,000.00		7/27/2021	Value Proposition	JRami
8	salesforce.com - 500 Widgets	Global Media	$50,000.00		4/26/2021	Closed Won	JRami
9	salesforce.com - 5000 Widgets	Global Media	$500,000.00		4/26/2021	Closed Won	JRami

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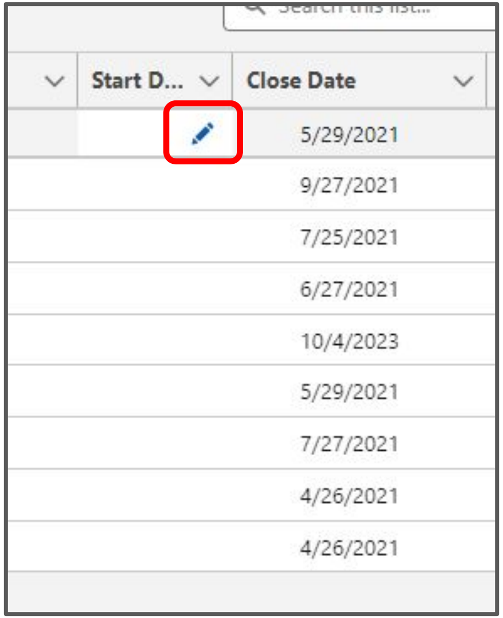
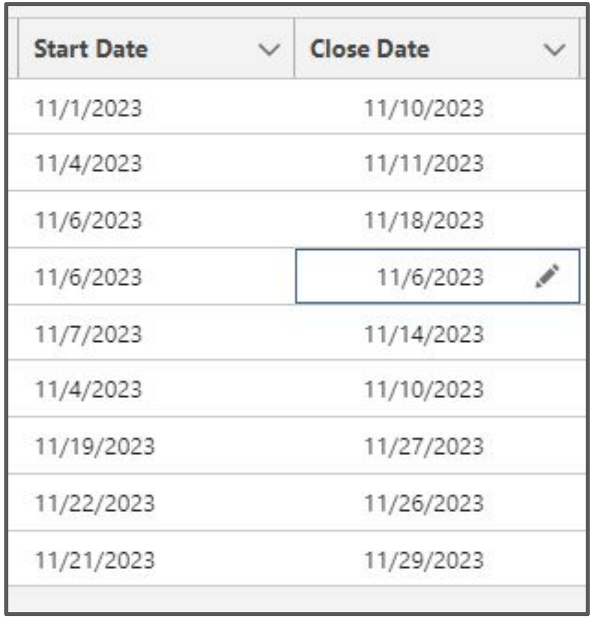
We have to take into account that all the records that will be shown in the application must have a start date prior to the closing date or perhaps the same day. Therefore, we will modify the records according to this criterion. Click on the pencil icon and modify "Start date" and "Close date". Then, click “Save”.

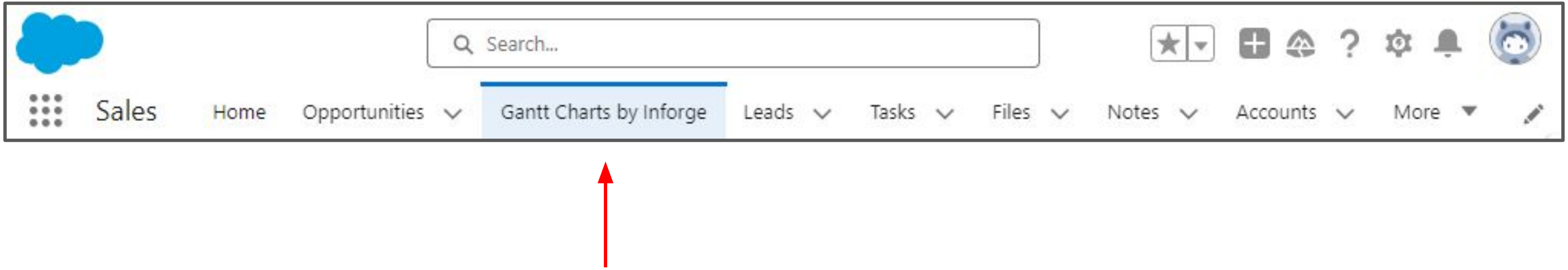


Start D...	Close Date
	5/29/2021
	9/27/2021
	7/25/2021
	6/27/2021
	10/4/2023
	5/29/2021
	7/27/2021
	4/26/2021
	4/26/2021



Start Date	Close Date
11/1/2023	11/10/2023
11/4/2023	11/11/2023
11/6/2023	11/18/2023
11/6/2023	11/6/2023
11/7/2023	11/14/2023
11/4/2023	11/10/2023
11/19/2023	11/27/2023
11/22/2023	11/26/2023
11/21/2023	11/29/2023

As we have already installed our App, let's create our Gantt Chart. Click on "Gantt Charts by Inforge" and it will allow you to configure this setting.



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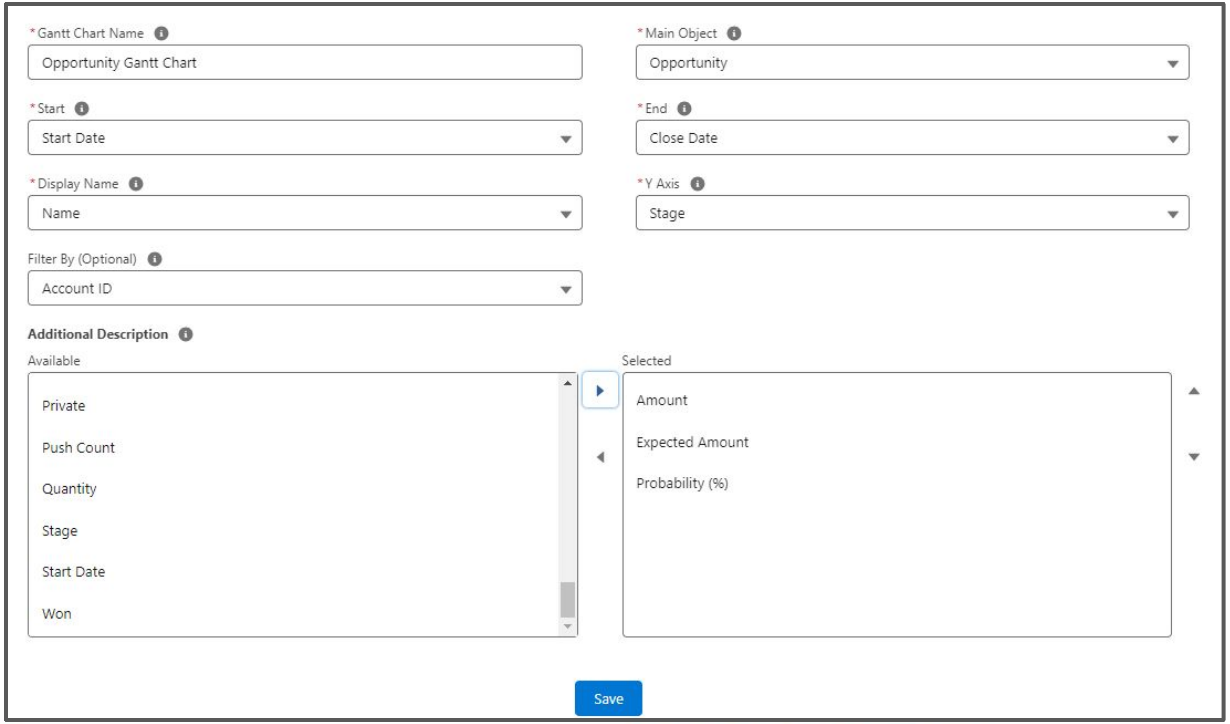
This is the Gantt Chart we are going to use in this Example.



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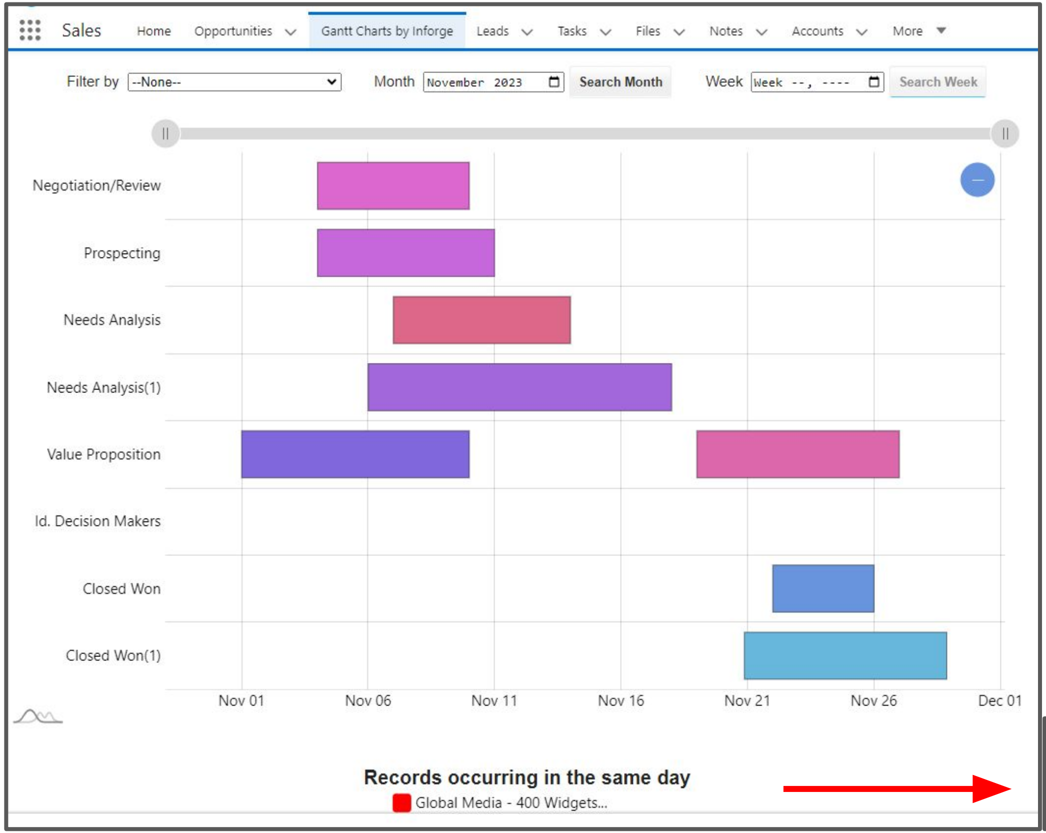
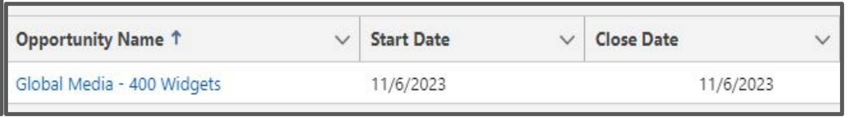


As we have modified all the records with dates in November 2023, when we search with "Month" and click on November 2023, then the application will show all the data related to that Month.

Something to keep in mind, if any date is shown at the bottom in the "Records Occurring in the same day", it is when a record has start and end on the same day, so, the application identifies this record and it is shown in this section.



Opportunity Name ↑	Start Date	Close Date
Global Media - 400 Widgets	11/6/2023	11/6/2023

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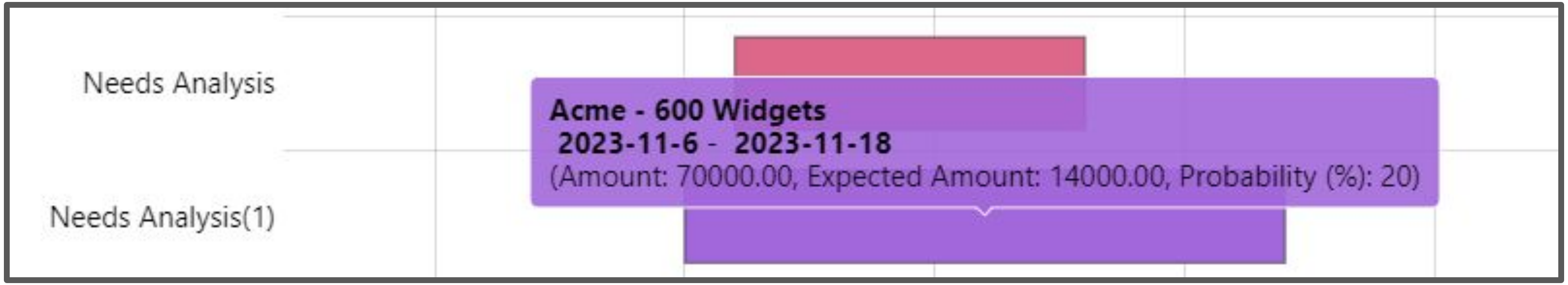
Example (Opportunities)



If we hover the mouse over the record we are interested in, we will be able to see the information we added in our Description.

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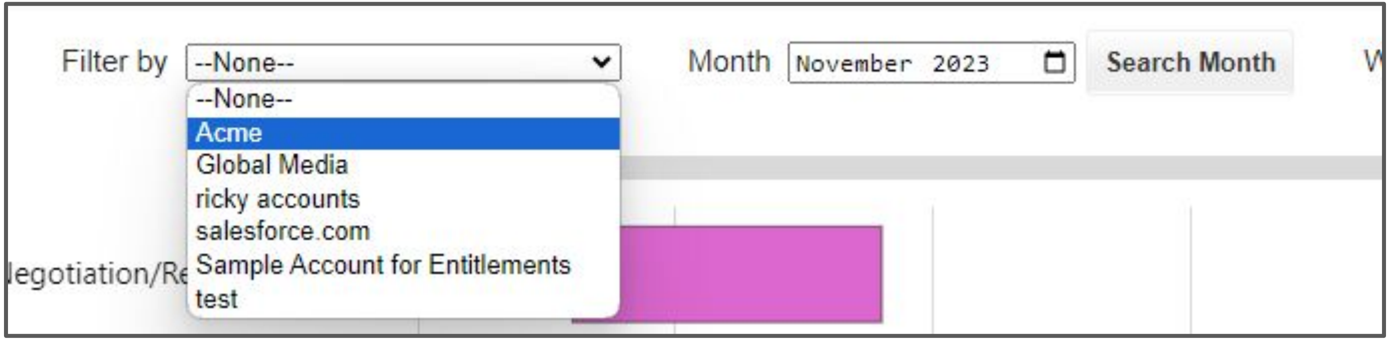
The "Filter By" we can filter according to the Filter we set in our Gantt Chart. In this case, shows all the accounts that belong to the opportunities.



Filtering by “Acme”