

Using Visualize Schedule

Project Gateway Agent Graphics has replaced the Visualize Schedule function for most users. The command is retained for existing users familiar with it.

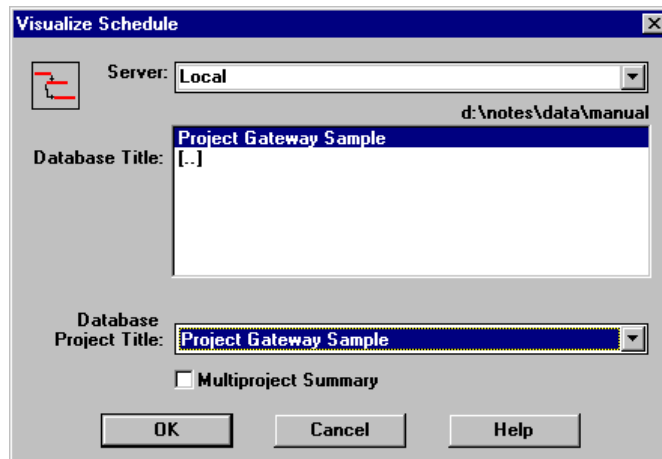
Using the Visualize functions, you can prepare attractive Gantt charts of your project schedules that are displayed by the included Charts Now graphing utility. The Charts Now! on-line help contains complete information on using the application as a standalone tool. This chapter discusses its use in conjunction with Project Gateway.

The Visualize Schedule Command

The Visualize command uses the Charts Now! application to present a Gantt chart of the project with the most up to date information in the database.

Visualize Schedule Dialog

Selecting the Visualize Schedule command from the Tools menu displays the familiar select database dialog, preset to the current database, the one last used for Record, Create, Make or Synchronize.



If you want to access a different database, select the server first, then click on the database title.

Note: If your server name does not appear in the dropdown list, you may enter it manually in the Server field.

Since Project Gateway databases can contain more than one project, the “Database Project Name” field allows you to choose which project is to be exported. The field displays the “Click Here...” prompt. When you click it, a drop list will appear showing the names of all projects in the database. Click on the desired project title to select it.

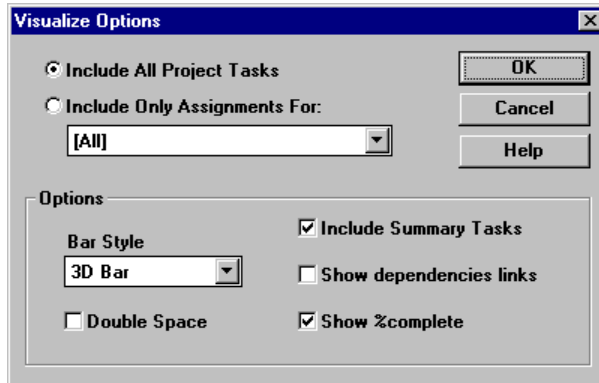
If you have not already selected a project in the database, the Database Project Title field will drop down when you press OK. You must select a project before proceeding, however, if there is only one project in the database, the system will automatically select it for you

Once selected, Project Gateway will display a progress dialog as it retrieves the Field Map and the StoredProjectModel. Then it reads the assignment documents, updates the project and displays the Visualize Options Dialog.

Multiproject Summary Option

Selecting this option removes the Database Project Title list box from the display. It causes the system to generate a special Gantt chart that shows one schedule bar for each project in the database. When selected the visualize options dialog is not shown. On this chart, each project appears as a summary bar, below it appear all the key events of that project. If InterProject dependencies are defined, they appear as connecting links between the key events.

Visualize Options Dialog



The radio buttons at the upper left allow you to chart the entire project (the default) or only those tasks assigned to a particular resource. To use this feature, check the Include Only option and select the resource name from the drop down list.

The Options setting in the lower panel controls what information is generated and how it will appear.

The list box selects the bar style: 3D, Drop Shadow, or Plain.

Include Summary tasks directs the creation of Gantt bars for "summary" tasks found in the project plan. Summary tasks are used to organize and group the work into logic sections and most project planners make use of them. When checked, summary tasks in the plan will be displayed as annotation symbols in the chart. If not checked, only individual tasks will be shown.

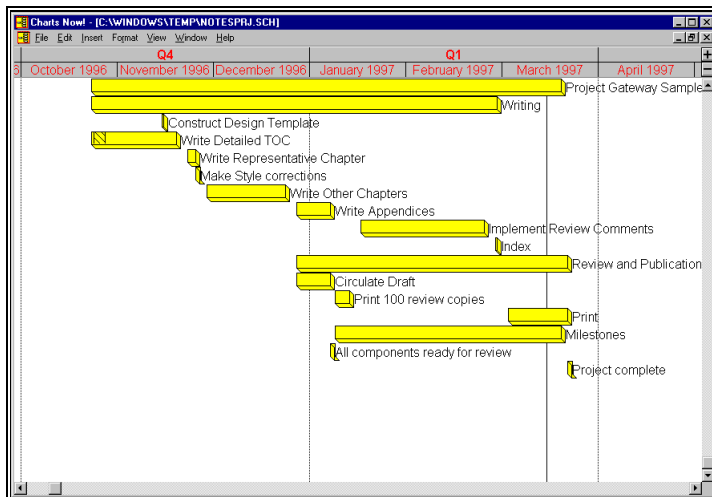
Show dependency links. This adds directed arrows to the chart to show the planned sequence of events. Only Finish to Start linkages are shown.

Show % Complete. This shades the bars in proportion to the percent complete reported for the task. Note that a task with several assignments will show the average percent complete for the assignments.

Double Space. This adds space between rows in the chart. Will result in more attractive displays for projects with only a few tasks.

Note: The color of Gantt bars and text is specified on the Project Gateway/Setting Dialog.

When you OK this dialog, Charts Now! will be launched and will display the chart.



Charts Now! Operation

General Information

Charts Now! has two views, a Chart view and a Symbol view. The Symbol View is a spreadsheet-like table showing all the elements of the chart. By double clicking on object in either the Chart or Symbol Views you will display a dialog of the detailed information for that item.

	Name	Start Date	Start Time	Line	Duration	Completed	Type	Responsible Pe
1	Project Gateway Sample	10-24-96	12:00am	1			Annotation	
2	Writing	10-24-96	12:00am	2			Annotation	
3	Construct Design Template	11-15-96	12:00am	3	3d 9h 0m	1d 6h 46m	Task	Laura
4	Write Detailed TOC	10-24-96	12:00am	4	28d 9h 0m	5d 23h 0m	Task	Laura
5	Write Representative Chapter	11-22-96	12:00am	5	4d 9h 0m	0d 0h 0m	Task	Laura
6	Make Style corrections	11-27-96	12:00am	6	1d 9h 0m	0d 0h 0m	Task	Dale
7	Write Other Chapters	11-29-96	12:00am	7	27d 9h 0m	0d 0h 0m	Task	Laura
8	Write Appendices	12-27-96	12:00am	8	13d 9h 0m	0d 0h 0m	Task	Laura
9	Implement Review Comments	01-17-97	12:00am	9	41d 9h 0m	0d 0h 0m	Task	Laura
10	Index	02-28-97	12:00am	10	3d 9h 0m	0d 0h 0m	Task	Dale
11	Review and Publication	12-27-96	12:00am	11			Annotation	
12	Circulate Draft	12-27-96	12:00am	12	13d 9h 0m	0d 0h 0m	Task	Dale
13	Print 100 review copies	01-10-97	12:00am	13	6d 9h 0m	0d 0h 0m	Task	Dale
14	Print	03-04-97	12:00am	14	20d 9h 0m	0d 0h 0m	Task	Dale
15	Milestones	01-09-97	12:00am	15			Annotation	
16	All components ready for review	01-09-97	12:00am	16	1d 0h 0m	0d 0h 0m	Task	Debbie
17	Project complete	03-24-97	12:00am	17	1d 0h 0m	0d 0h 0m	Task	Debbie

Symbol

Name: Type:

Start Date: Anchored

Start Time: Row:

Duration: Days: Hours: Mins:

Completed:

Responsible: Display: Name Notes

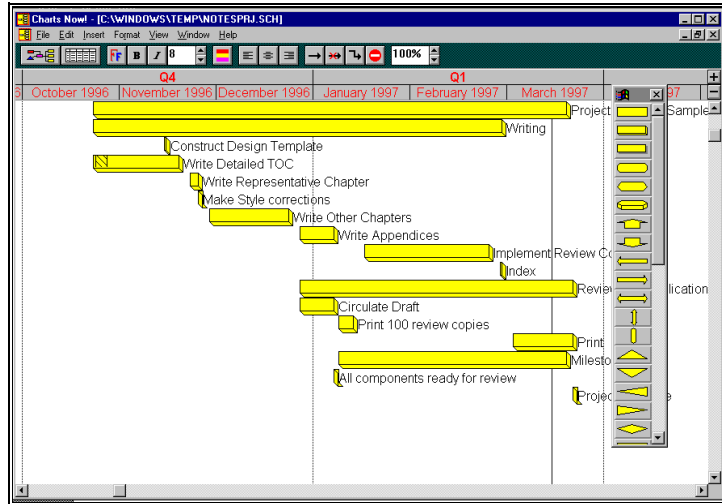
User Defined 2:

User Defined 3:

Notes:

Buttons: OK, Cancel, Help, Style..., Font..., Color...

When Charts Now! is launched by Project Gateway, the Toolbar and Symbol palette are not displayed. You can display them by using the View command.



Selecting Symbols

All symbol (i.e. task bar) related commands, such as Move Symbols, Copy Symbols, and Delete Symbols, operate on one or more selected symbols. The button bar property selectors also work on selected symbols. Multiple symbol selection is a powerful feature that lets you make changes just once to an entire group of symbols. This saves work and speeds the editing process.

For example, suppose you want to change the font typeface for a group of symbols. Simply select each symbol you want to change and then select a new typeface. Each selected symbol is immediately updated with the new typeface.

To select a single symbol:

1. Move the cursor over the desired symbol.
2. Press the left mouse button. The symbol's color changes to white, indicating the symbol is selected.

To select multiple symbols:

1. Move the mouse cursor over a desired symbol.
2. Press the SHIFT key and the left mouse button simultaneously (Shift-Click). The symbol's color changes to white, indicating the symbol is selected.
3. Repeat the previous steps for each additional symbol.

To select a range of symbols:

1. Move the mouse cursor to the upper-left of the area to be selected.
2. Press the left mouse button and drag the mouse while holding down the left mouse button. A bounding rectangle appears showing the area to be selected.
3. Release the left mouse button. All symbols falling in the selected area change to white, indicating the symbols that have been selected.

To select all symbols:

From the Edit menu, choose Select All. All symbols on the chart change to white, indicating they have been selected.

Unselecting Symbols

After completing a symbol operation, you can unselect the selected symbols before selecting others for new symbol operations.

To unselect symbols one-by-one:

1. Move the mouse cursor to the desired symbol.
2. Press the SHIFT key and the left mouse button simultaneously (Shift-Click). The symbol's color changes from white back to its normal color, indicating the symbol is no longer selected.
3. Repeat these steps for each symbol that you want to unselect.

To unselect all symbols on the chart, select the Unselect All command from the Edit menu. All selected symbols change to their individual symbol colors, indicating they are no longer selected.

Formatting The Selected Items

The Format menu commands will change the appearance of the items selected.

Changing Symbol Styles, Fonts, and Colors

There are two ways to set symbol shapes, fonts, and colors for the chart objects: the Button Bar and the Symbol dialog box. The Button Bar is the most convenient way to quickly change a property for one or more symbols. The Symbol dialog lets you change these display properties as well as enter note text and adjust the symbol's start date and duration.

To change the symbol shape, font, or color using the button bar:

1. Select one or more symbols.
2. Use the mouse to select a typeface, font size, justification, color, or symbol shape from the button bar controls. The new property is applied to all selected symbols.
3. (Optional) Choose the Edit | Unselect All command to deselect the symbols. You may postpone this step if you wish to make further property style changes to the selected symbols. You can

also use the Format | Style dialog box to change the style for one or more symbols.

Shape

Choose from over 45 different symbol shapes. Note that the bit map and text shapes will appear as blank unless there is a bit map or text present to display.

Text Justification

The name and notes displayed in a symbol can be left, center, or right justified.

Text Placement

The symbol name and notes can be displayed inside the symbol and also in various positions around the box. Placing text outside the box is useful for milestones, where the text normally appears to the right of the milestone. This feature is also useful for displaying a long name that will not fit inside the symbol.

Sizing

Symbols can automatically size themselves to fit the name or notes displayed inside the symbol. A symbol can automatically grow itself vertically or horizontally as designated. Automatically expanding a symbol horizontally is useful for milestones, which do not have a duration. Expanding vertically is useful for annotations that display long notes.

A symbol can also shrink the font size of the displayed text until all of the text fits inside the symbol. This is useful for symbols whose size or duration cannot be changed and where it is important to display all of the text within the symbol.

Formatting The Chart

Note: Printing is not supported in the Project Gateway Edition.

Legend

The Legend dialog box is used to enter user-defined symbol field names. There are three user-defined fields that appear on the Task dialog box. The field names entered on the Legend dialog box appear to the left of the user-defined fields on the Task dialog box. These field names are also used on the Filter dialog box for use in selecting a subset of symbols for display on the chart.

Layout

The Format | Layout dialog designates which scale is displayed at the top of the chart area and other options.

Scale

Charts Now! has three different scales: the time scale, an inches ruler, and a centimeter ruler. The time scale is typically used for Gantt and

PERT charts, while the inches and centimeter rulers are used for network diagrams, flow charts, organization charts, and other types of diagrams that aren't time related

The time scale has a variety of different date and time formats and is printed as part of the chart. When the Time Scale is selected on the Layout dialog, the Format pull-down menu will have a Time Scale command. When either the Inches or Centimeter rulers are selected on the Layout dialog, the Format pull-down menu will have a Ruler command instead of a Time Scale command.

Show Percentage Complete

The Show Percentage Complete option alters the display of symbols by showing the portion of each symbol that has been completed differently from the incomplete portion. When this option is enabled, the completed portion of each symbol is shown normally. The incomplete portion of the symbol is shown with a diagonal hatched line. The percentage complete is calculated from the Completed Duration field on the Task dialog box for each symbol.

Show Links

The Show Links option enables the display of links between symbols. Turning the Show Links option off removes the symbol links from display. Turning Show Links off does not remove or delete the symbol links it merely hides them from view.

Turning the Show Links option off is a convenient way to hide the sometimes cluttered set of symbol links. This is especially important when preparing a report for management that is only interested in the schedule and not the assumptions leading to the schedule. It also makes scrolling much faster.

Copying The Chart To The Clipboard

Charts Now! uses a special Edit | Copy Image to Clipboard command to copy a chart image to the Windows clipboard.

The Copy Image to Clipboard dialog lets you select the portion of the chart you want transferred.

After the chart image has been copied to the Windows clipboard, it is available for all other applications to paste into their documents or files as appropriate. In most applications, the image transfer is completed using an Edit | Paste command in the destination application.

Charts Now! creates a bit map image of the chart on the Windows clipboard.

Start Date, End Date

Select the date range to be copied to the clipboard. This allows you to selectively copy portions of the schedule to the clipboard.