

23-2-2024

Project Gantt from FCC release 17.1.0

Fortes Change Cloud



Editon of

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Management summary

At the request of our users, we have developed a new Gantt for planning in projects.

This new Gantt offers extended functionality such as:

- Critical path
- Undo and Redo
- Edit - Save: no more direct editing
- Extension of dependencies
- Adding delays to dependencies
- Integration with resource planning: costs and hours

Inhoudsopgave

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1 New Project Gantt

*This functionality is behind feature toggle **Feature.EnableNewProjectGantt**.*

This can be activated in your Fortes Change Cloud environment only by the administrator.

Gantts provide an overview of project planning and help manage the sequence of tasks, activities and their interdependencies. In doing so, it is valuable when communicating with project teams and sponsors.

At the request of our users, we have developed a new Gantt for planning in projects. This new Gantt offers expanded functionality such as:

- Critical path
- Undo and Redo
- Edit – Save: no more direct editing
- Extension of dependencies
- Add delays to dependencies
- Integration with resource planning: costs and hours

1.1 Consequences of migrating to the new Gantt

Attention!

1. Per project convert the Gantt:

If you want to use the new Gantt, the schedule in the old Gantt must be migrated on a project-by-project basis. This can be done at the touch of a button per project. The migration to the new Gantt **cannot** be undone and is therefore irreversible.

2. The Resource planning tab disappears because it is now integrated into the new Gantt:

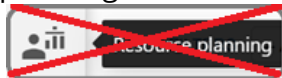
Scheduled skill and resource hours that were entered on the resource planning tab are migrated and become visible again in the new 'skill and resource hours segment'. If skill or resource hours were split in the 'Resource planning' tab, they will be migrated as totals to the new segment. This is discussed in more detail later.

1.2 How to migrate to the new Gantt

Per project (in standard mode), the planning in the old Gantt can be migrated to the new Gantt with the push of a button. There is no bulk function (yet) available with which the planning in the Gantt can be migrated directly in all projects.

If you open a project and go to the 'Project planning' tab, the 'Migrate to new Gantt' button is at the top of the page. Pressing this button will migrate the schedule in the old Gantt to the new Gantt.

Once the planning in the project is migrated, this button disappears. The 'Resource planning' tab will also disappear.



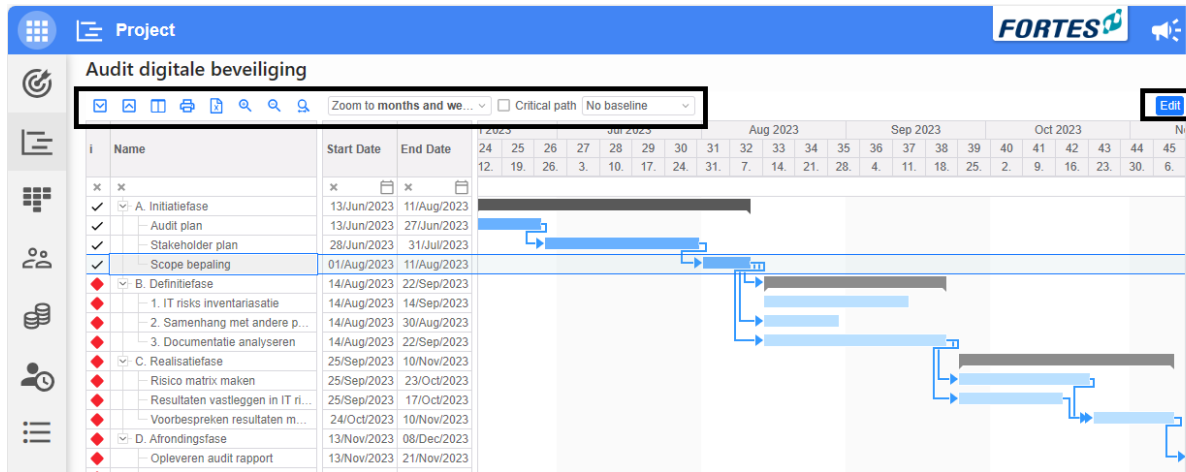
The screenshot shows the 'Project' interface for 'Audit digitale beveiliging' in 'DEFAULT MODE'. A button labeled 'Migrate to new Gantt' is highlighted with a black box. To the left, a sidebar menu has a 'Project planning' icon highlighted with a black box and a red 'X' over it. Below the sidebar is a table with project tasks and their dates.

Name	Start Date	End Date
A. Initiatiefase	13 Jun 2023	11 Aug 2023
Audit plan	13 Jun 20...	27 Jun 20...
Stakeholder plan	28 Jun 20...	31 Jul 2023
Scope bepaling	1 Aug 2023	11 Aug 20...
B. Definitiefase	14 Aug 2023	22 Sep 2023
1. IT risks invent...	14 Aug 20...	14 Sep 20...
2. Samenhang ...	14 Aug 20...	30 Aug 20...
3. Documentatie...	14 Aug 20...	22 Sep 20...
C. Realisatiefase	25 Sep 2023	10 Nov 2023
Bisnes matrix m...	25 Sep 20...	23 Oct 20...

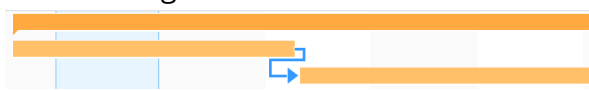

1.3 Features in the new Gantt


Once the schedule migration has taken place, the new functionality will be available. What is immediately noticeable is that the planning is no longer directly editable. This should prevent errors due to accidental dragging and dropping of plan items.

As soon as you press the 'Edit' button (right above the planning), the planning can be modified. The following functionalities are available for this purpose:

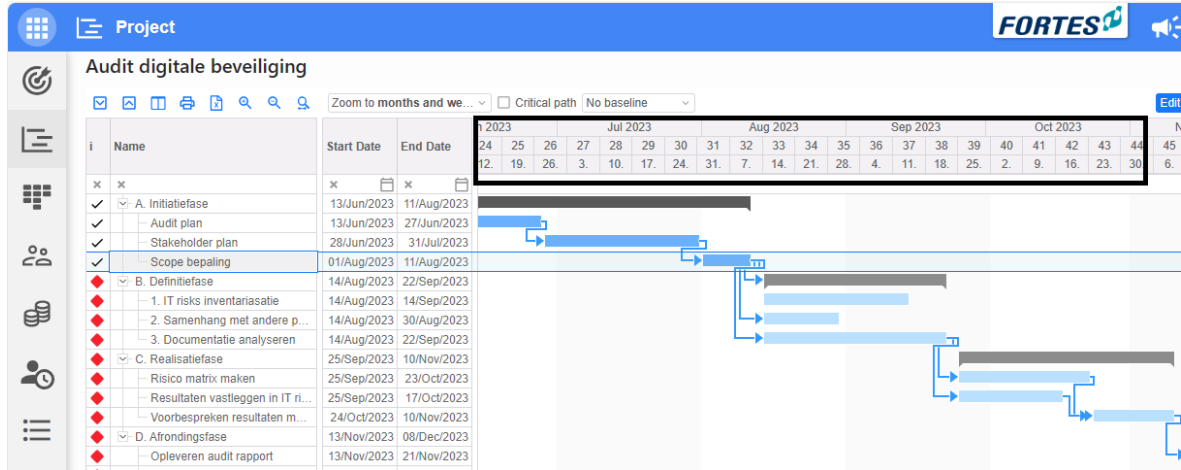


Funcies voor de blik op de Gantt

	<p>Expand and collapse all rows.</p>
	<p>Select columns to be shown in the schedule. By default, the start and end dates are shown and the percentage ready.</p>
	<p>Printing the schedule.</p>
	<p>Export planning to Excel.</p>
	<p>Zooming in and out and fitting planning.</p>
	<p>There are 4 standard zoom levels:</p> <ul style="list-style-type: none"> • Years and quarters; • Quarters and months; • Months and weeks; • Weeks and days.
<input type="checkbox"/> Critical path	<p>Selecting the critical path shows the critical path. If a plan item is part of the critical path then the planning bar is shown orange.</p>  <p>If there is still a planning issue on the critical path (as in the example below), the plan item's planning bar is shown in red.</p> 

<div style="border: 1px solid #ccc; padding: 5px;"> Geen baseline ▼ <hr/> Geen baseline <hr/> Initiële baseline <hr/> Actuele baseline </div>	<p>If a baseline is set, this can be used to show either the initial or the current baseline. The baseline is shown using a thinner blue bar below the planned bar.</p> 
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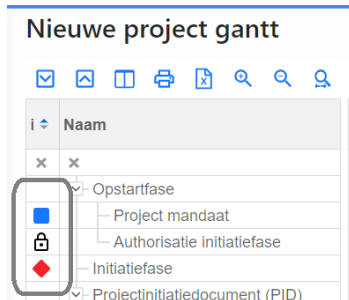
Zooming in and out of the timeline



Zooming in and out can also be done by clicking on the header of the Gantt.

- Hold left mouse button + drag: zoom by date range. This makes it easy to make the schedule fit your screen.
- Left mouse button: zoom in on date. For example, suppose you click 'Jan 2024' in the screen above, your screen will show the entire month of January. This works the same way for years, quarters and days.
- Right-click: zoom out.

Signals in the planning


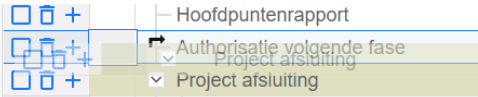


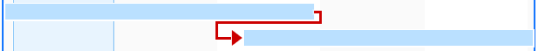
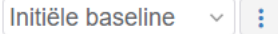
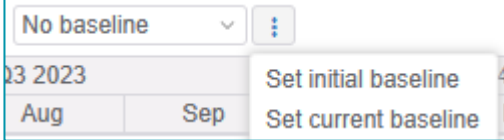
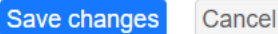


The first column of the Gantt is a status column. The following statuses are distinguished:

■	Plan item has a conflict in a dependency
🔒	Plan item is mandatory and cannot be deleted or renamed
◆	Plan items deadline exceeded

Functions for managing plan items

	<p>Clicking the plus sign (in the bar above the schedule) adds an item at the bottom of the schedule.</p>															
	<p>By clicking the plus sign on a line, you add a 'child' (sub-item) under the item in question. The new item then jumps up 1 level. There is no limit to the number of levels.</p>															
<p>Add Plan item</p>	<div data-bbox="523 1077 1182 1279" style="border: 1px solid #ccc; padding: 10px;"> <p>Add Plan item</p> <input style="width: 100%; height: 20px; margin-bottom: 10px;" type="text"/> <div style="display: flex; justify-content: flex-end; gap: 10px;"> Add Cancel </div> </div> <p>Import multiple plan items at once: clicking 'Add plan item' (button below the plan) opens a dialogue. You can add multiple lines at once here by entering or pasting enter-separated lines in the input field. These are then added as separate lines at the bottom of the planning.</p>															
	<div data-bbox="523 1525 820 1742" style="border: 1px solid #ccc; padding: 10px;"> <p>Nieuwe project gantt</p> <div style="border-bottom: 1px solid #ccc; padding-bottom: 5px;"> <input type="checkbox"/> i Naam </div> <table style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="width: 30px; text-align: left;">x</th> <th style="width: 30px; text-align: left;">x</th> <th></th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td>Opstartfase</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> Project mandaat</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> Authorisatie initiatiefase</td> </tr> <tr> <td><input type="checkbox"/></td> <td><input type="checkbox"/></td> <td> Initiatiefase</td> </tr> </tbody> </table> </div> <p>You can select all items by selecting the check box at the top. You can quickly select items by holding down the left mouse button and dragging over the check boxes at the same time.</p>	x	x		<input type="checkbox"/>	<input type="checkbox"/>	Opstartfase	<input type="checkbox"/>	<input type="checkbox"/>	Project mandaat	<input type="checkbox"/>	<input type="checkbox"/>	Authorisatie initiatiefase	<input type="checkbox"/>	<input type="checkbox"/>	Initiatiefase
x	x															
<input type="checkbox"/>	<input type="checkbox"/>	Opstartfase														
<input type="checkbox"/>	<input type="checkbox"/>	Project mandaat														
<input type="checkbox"/>	<input type="checkbox"/>	Authorisatie initiatiefase														
<input type="checkbox"/>	<input type="checkbox"/>	Initiatiefase														
	<p>By ticking multiple items and clicking on the bin in the header, you can delete multiple items at once.</p>															

	<p>Each line also has a bin; this is useful if you wish to delete one or a few items.</p>
	<p>With the indent and outdent buttons you can set plan items to the correct level. Select one or more plan items by checking the check box in front of the plan item. Then click the outdent button if you want to move the selected plan items down one level and click the indent button if you want to move these plan items up one level.</p>  <p>You can also grab a plan item by holding down your left mouse button on the plan item and dragging. Then drag the plan item to the desired location and level. The black arrow indicates where you place the plan item when you release the left mouse button.</p>
	<p>Undo and Redo: These buttons allow you to undo the last action (left arrow) or redo the last action (right arrow).</p>
	 <p>Using this button, you can have incorrect dependencies fixed automatically. If a dependency is incorrect, it is shown in red in the planning.</p> <p>If you press the button shown, all incorrect dependencies are resolved if possible.</p> <p>Note: plan items that are 100% ready are obviously not moved when resolved.</p>
	 <p>In planning, an initial and a current baseline can be set. A baseline is set for the entire schedule.</p>
	<p>Clicking 'Save changes' will save the changes made. Clicking 'Cancel' will not save the changes made.</p>

Other actions with the mouse in planning (in edit mode):

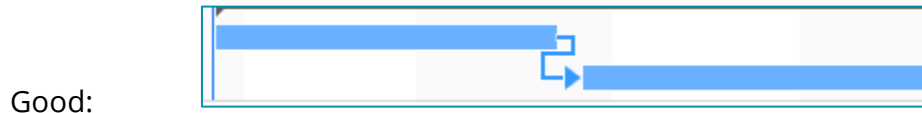
- Left mouse button + drag: make a planning bar longer or shorter or move it.
- Right mouse button + drag: create dependencies between items.
- Ctrl + left mouse button: click on a planning bar and the planning of that plan item is deleted. Clicking on a dependency deletes it.

1.4 Planning dependencies

In the new Gantt, the following dependencies can be made between plan items:

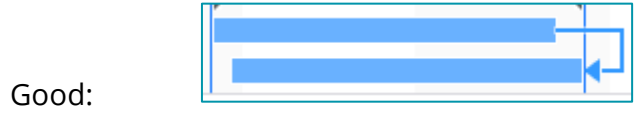
Finish-to-start

This dependency means that a task can only start after the previous task has been completed.



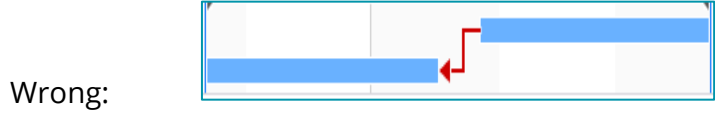
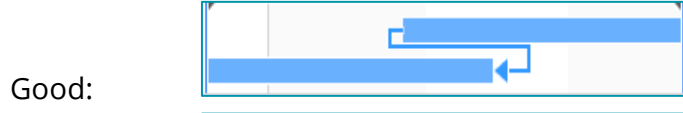
Finish-to-finish

With this dependency, a task can be completed only after the previous task has also been completed.



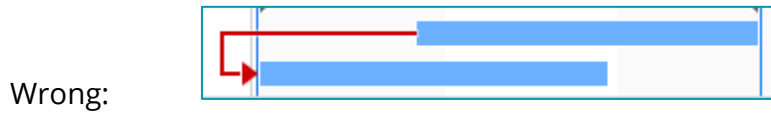
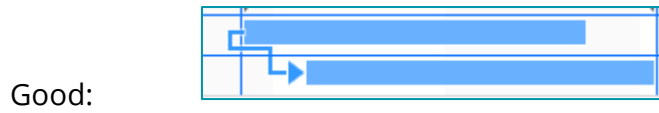
Start-to-finish

This dependency means that a task can be completed only after the previous task has been started.



Start-to-start

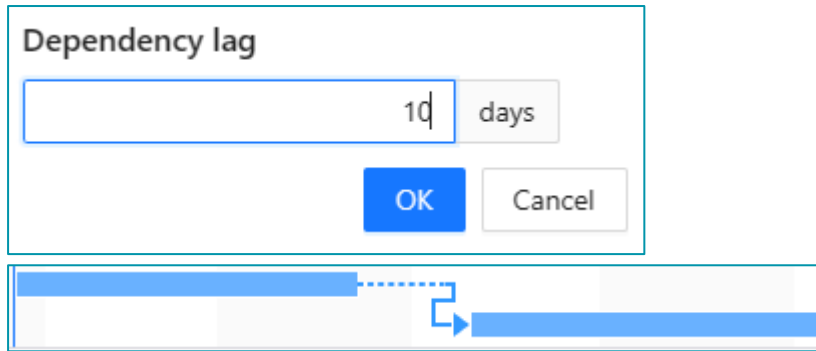
With this dependency, a task can start as soon as the previous task is started, without requiring completion for the previous task.



Delay:

Double-clicking in the schedule on the dependency line displays a pop-up. In it, you can enter the desired delay for the dependency. A dotted line for the delay then appears in the planning.

Example: a plan item may only start 10 days after the previous plan item has been completed.



1.5 Add planning costs and hours to a plan item

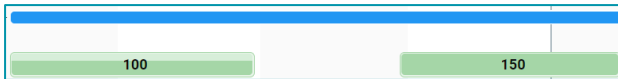
Scheduling costs and hours is now integrated in the new Gantt. Costs and hours can be scheduled on the detail page of a plan item.

As mentioned earlier, after the migration to the new Gantt, the tab 'Resource planning' is not available anymore.



Hours that were recorded in the 'Resource planning' tab have been migrated. They are now visible in the 'Scheduled hours' segment for skill and resource hours on the detail page of a plan item.

If resource hours were split in the 'Resource planning' tab, they are migrated as totals to the new segment. So in the example below, 250 hours are shown with the relevant skill.



Note! This is a difference from the past. Resource capacity splitting within a plan item is no longer possible. As a result, planned capacity is now always evenly distributed over the duration of the plan item. This while in the old situation you could vary in this; as the example shows with 100 hours at the beginning, then nothing for a while and at the end 150 hours.

The administrator of the FCC environment can add the desired segments for this in the project model on the canvas of plan items. This makes the functionality immediately available for all projects created with that project model.

Explanations on configuring canvases are [here](#) on the knowledge base.

The following segments are distinguished:

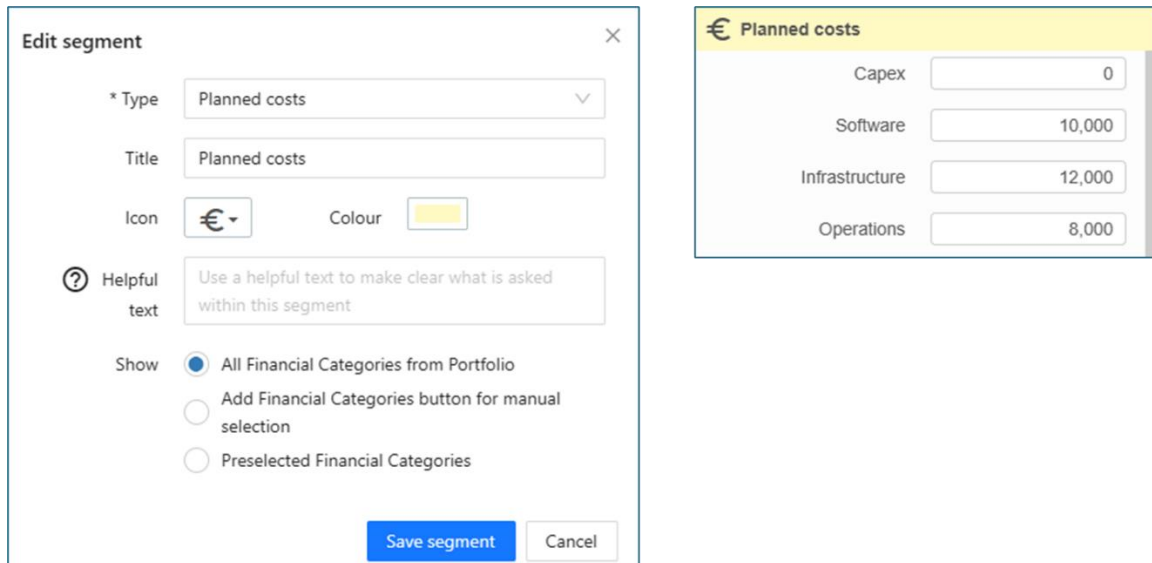
- Scheduled cost segment
- Planned skill- and resource-hours segment
- Planned team-hours segment

€ Planned costs	Planned skill and resource hours	Planned team hours
Capex <input type="text" value="0"/>	Auditor (Audit afdeling) <input type="text" value="20"/> Hours	DevOps team 1 <input type="text" value="250"/> Hours
Software <input type="text" value="10,000"/>	Projectmanager (Audit afdeling) <input type="text" value="100"/> Hours	DevOps team 2 <input type="text" value="20"/> Hours
Infrastructure <input type="text" value="12,000"/>	+ Select skill and resources hours	DevOps team 3 <input type="text" value="0"/> Hours
Operations <input type="text" value="8,000"/>		

1.5.1 Planned cost segment

In this segment, the planned costs per financial category can be indicated for each product.

When configuring this segment (*by the administrator of the FCC environment*), it is possible to choose which financial categories should be available. Each portfolio can have its own selection of financial categories. Depending on which portfolio a project is created from, that project then gets the financial categories of that portfolio.



The image shows two screenshots from a software interface. The left screenshot is a dialog box titled 'Edit segment' with a close button (X) in the top right corner. It contains the following fields and options:

- * Type: A dropdown menu with 'Planned costs' selected.
- Title: A text input field containing 'Planned costs'.
- Icon: A dropdown menu showing a Euro symbol (€) and a small downward arrow.
- Colour: A color selection box showing a yellow color.
- Helpful text: A text area with a question mark icon and the placeholder text 'Use a helpful text to make clear what is asked within this segment'.
- Show: Three radio button options:
 - All Financial Categories from Portfolio
 - Add Financial Categories button for manual selection
 - Preselected Financial Categories

At the bottom of the dialog are two buttons: 'Save segment' (highlighted in blue) and 'Cancel'.

The right screenshot shows a configuration screen titled '€ Planned costs' with a yellow header. It contains four rows, each with a label and a numeric input field:

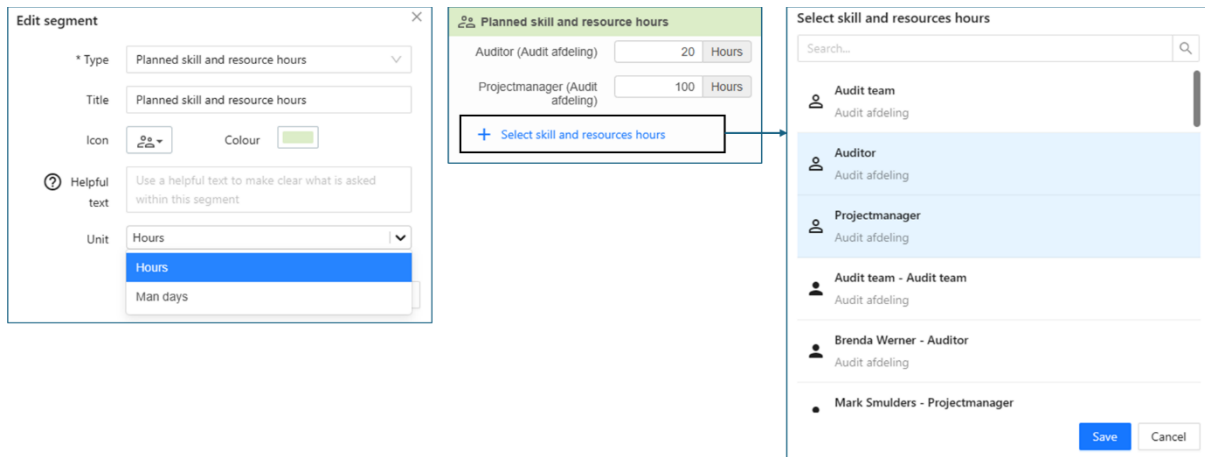
- Capex: 0
- Software: 10,000
- Infrastructure: 12,000
- Operations: 8,000

The following configurations are possible:

- All Portfolio Financial Categories: shows in the project's plan item all the financial categories available from the portfolio from which the project was started.
- Add a Financial categories button for manual selection: the user can then add the financial categories on which costs are planned. You do not then need to show the financial categories on which no costs are planned.
- Pre-selected Financial categories: you can also add a restriction. For example, if you want costs to be scheduled only on the financial category 'Hardware', you select only that category in the configuration. The user cannot add other financial categories himself.

1.5.2 Scheduled skill and resource hours segment

When configuring this segment (*by the administrator of the FCC environment*), the unit of entry can be chosen: either hours or man-days can be chosen. Regardless of the choice, bookings are all stored in hours.



In the project, a skill or person (with skill) can be added within a plan item by opening the plan item. Then in the segment clicking '+ Select skill and resources hours'. For this skill or person, you can then indicate how many hours/months are required for the realisation of that specific plan item.

1.5.3 Scheduled team hours

When working with teams, hours or man-days can also be recorded per team.

Edit segment ✕

* Type

Title

Icon Colour

Helpful text

Unit

Show All Teams from Portfolio
 Add Teams button for manual selection
 Preselected Teams

Planned team hours

DevOps team 1	250	Hours
DevOps team 2	20	Hours
DevOps team 3	0	Hours

When configuring this segment, the unit of entry can be chosen. Either hours or man-days can be chosen. Regardless of the choice, entries are all stored in hours.

When configuring the "scheduled team-hours segment", you can choose which teams should be available in the segment. All teams from the portfolio or a selection to be added by the end user via an add button in the segment or a pre-selected set of teams defined during the configuration of the segment.