

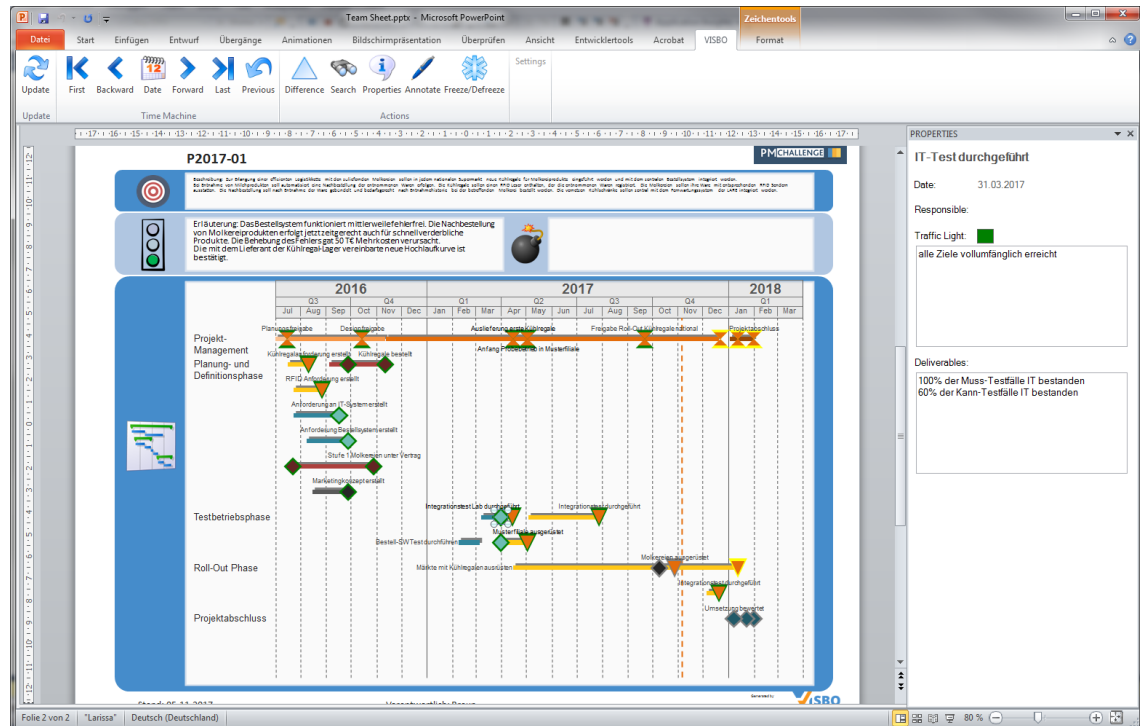
# Users Guide

VISBO Powerpoint Add-In  
VISBO GmbH, Dec 2020

## Content

About VISBO Add-In SmartInfo.....	3
Use Cases.....	5
Time-Machine.....	5
Properties Pane .....	8
Search Pane .....	9
Annotate.....	11
Create a Report .....	13
Add Elements .....	16

## About VISBO Add-In SmartInfo



**Picture 1: VISBO smart Powerpoint Report**

Powerpoint Reports generated by VISBO VISUAL BOARD or the VISBO Powerpoint Add-In „SmartInfo “ may get annotated, searched and updated with the VISBO Powerpoint Add-In.

To be able to update the report or to retrieve a former planning status from the database, a user must login to the database. The login appears as soon as the user clicks on one of the time machine buttons.

### Overview Functionalities

- Update milestones and tasks or retrieve former planning status.
- Update smart Charts, Tables and Texts (requires Visual Board to create reports with smart tables, charts, texts)
- Annotate milestones and tasks with
  - o Name
  - o abbreviation of name
  - o date
  - o calendar week
- Show traffic light status of milestones and tasks. There are four colors: red, yellow, green and grey. Grey is, there was no traffic color provided in the plan.
- Search for certain milestones and tasks:
  - o By name
  - o By traffic light color
  - o By deliverable
  - o By responsible person

- By „overdue“. Each milestone or task is considered “overdue” in case it’s end-date is in the past and the milestone/task is having a „% Done“-value of less than 100%.

**Note 1:** In general only information may be searched when this kind of information was provided in the authoring system, for example MS Project. For more details please contact your administrator or key user.

**Note 2:** Users may add arbitrary additional powerpoint elements such as graphic elements, text, pictures and the like to a slide with VISBO smart information. When updating occurs after pressing the VISBO update button, all user-added powerpoint elements remain as-is.

**Note 3:** All VISBO smart elements may be moved on the slide without interfering with the update functionality. Please note, that once you move a milestone or task horizontally, you change its date on the powerpoint slide!

In case you unintentionally moved a milestone / task, just press the “Update” button. This will bring the milestones / tasks back to their correct position.

If you would like to improve overview and layout, you of course may move milestones/tasks vertically without manipulating.

**Note 4:** You may copy a whole slide with VISBO smart elements, then delete several elements and re-arrange the remaining elements in order to create a „supplier slide“, for example. As mentioned above: when re-arranging milestones and tasks, please make sure to only move them vertically (see Note 3).

**Note 5:** Pressing one of the „time machine“ buttons will cause all slides of the presentation to be updated. You can suppress this by “freezing” the slides you don’t want to get updated.

Example use case: you would like to create a powerpoint file showing the different timestamped versions to someone **without** the VISBO powerpoint Add-In:

1. Copy slide
2. Go to copied slide: Press „freeze“
3. Press “Update”

This will result in one slide updated, the copied “frozen” slide remains unchanged. If you would like to update a “frozen slide” again, just go the slide, then once again press “Freeze/Defreeze”. The “freeze” symbol disappears.

## Use Cases

### Time-Machine

All "time-machine" buttons apply to **all** smart slides in the presentation, except those slides with the "freeze" symbol. Please note: to "de-freeze" a slide you need to go to that slide and press the "Freeze/De-Freeze" Button again. The "freeze" symbol will vanish. Just manually deleting the freeze symbol will have no effect.

Each "time-machine" button will cause milestones & tasks get moved to that date they had at that according time. In addition all connected information to that milestone such as "responsible person", "deliverable", "traffic lights" and "traffic light explanations" will get updated accordingly. The same applies to annotations of milestones & tasks. If there are traffic lights connected to milestones and tasks other than grey or green, they get visible automatically. All other traffic light colors users may visualize with the "search pane".

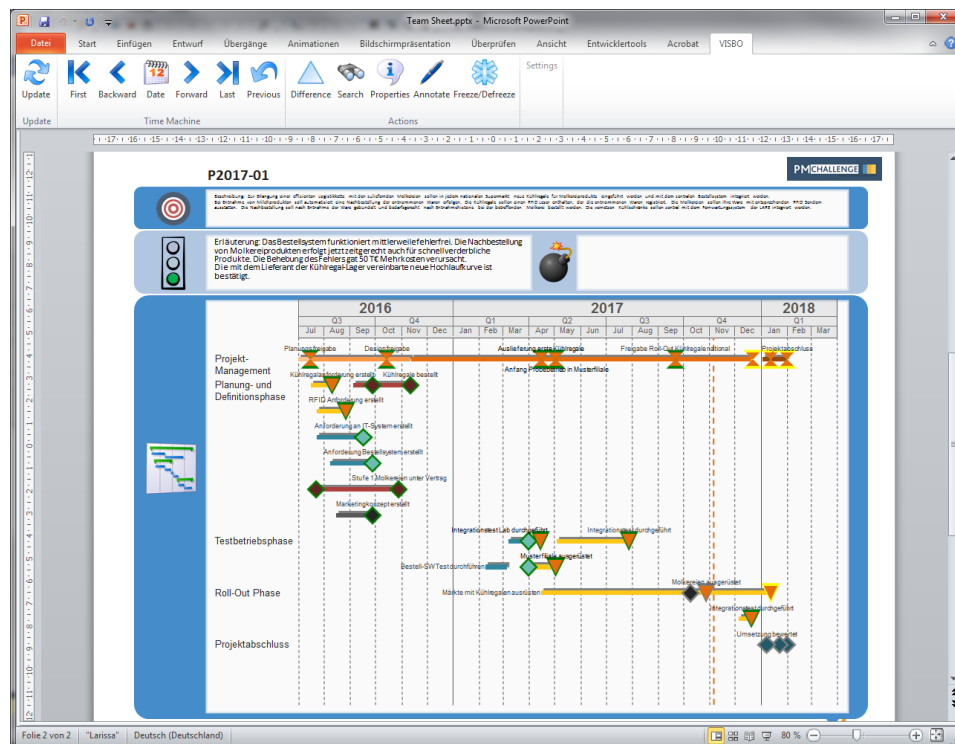
Smart tables, smart charts and smart text-elements will get updated as well.

A annotation showing the "date of timestamp" will be placed on top of each updated slide.

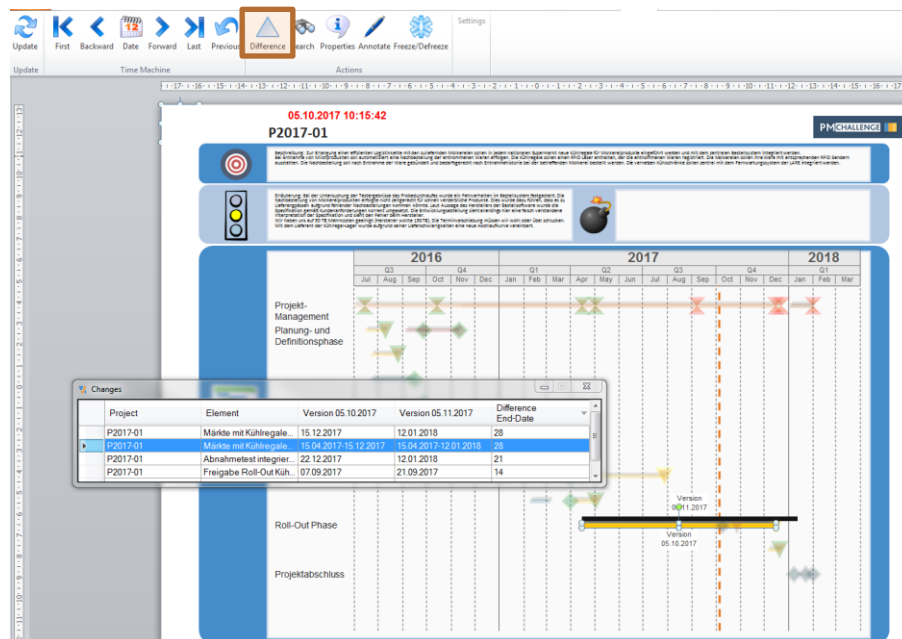
Note: Please be aware that – dependent on the number of slides in the presentation and the number of smart elements – the time machine process will take a while.

There are following time machine related buttons:

- Update: Show last / current version of plan
- First: Show the first version of the plan
- Backward: Show version of plan one month back
- Date: Show the version of plan at given date & time
- Forward: Show version of plan one month forward
- Last: Show last / current version of plan (same as "Update")
- Show previous version button: applying this button allows to toggle between the last two shown versions in time.



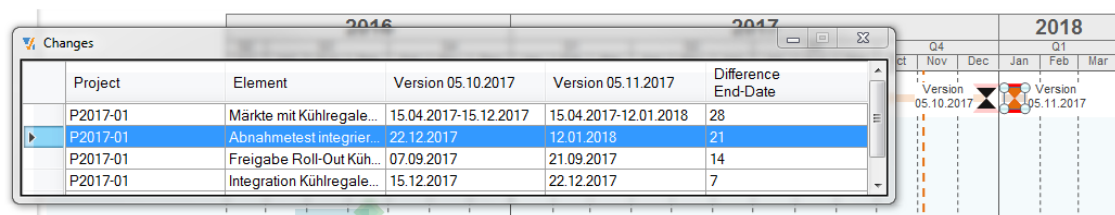
**Show all milestones / tasks which changed with respect to last shown version.**



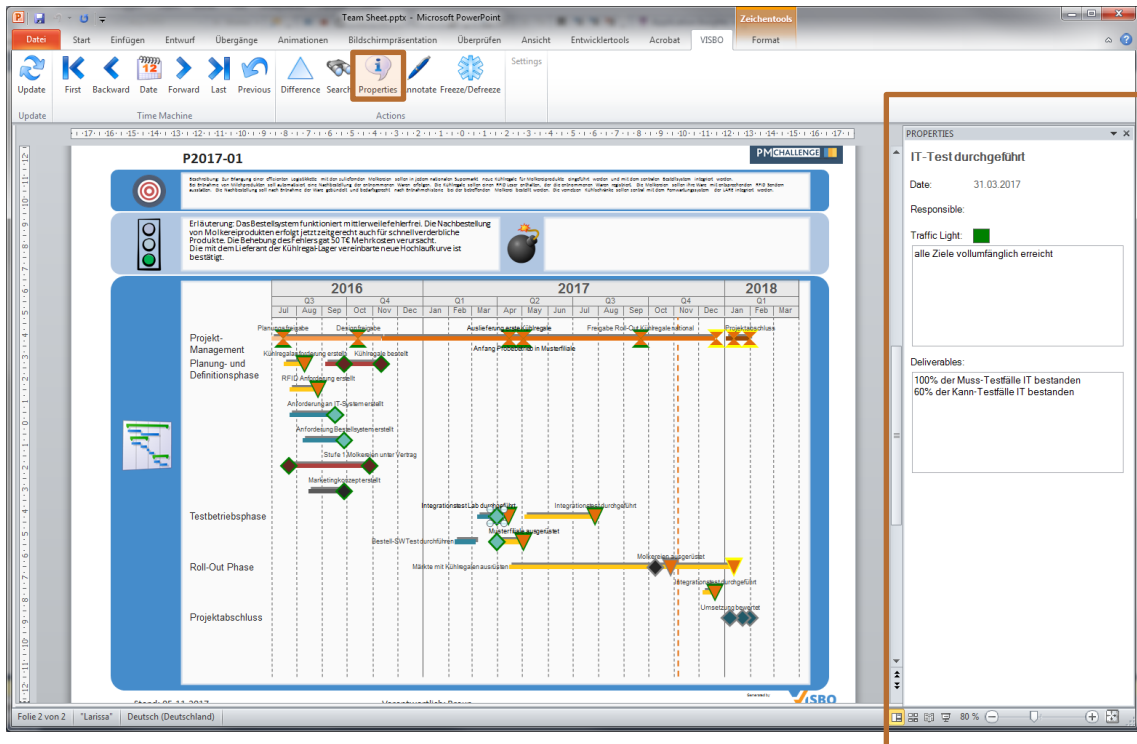
By pressing the button "Difference" a user may call up a list showing the milestones & tasks which have changed between the current version and previously shown version. The table shows name of the elements, the date at version1, the date at version2 and the difference in days between those two versions.

Clicking into the Header column "Difference End Date" will get the line items sorted in ascending / descending order.

Clicking on a certain line item will cause all elements dimmed except the chosen element. The chosen element will be shown „twice“. In black color the date representation of the previous version, in normal color the date representation of the actual version. See pictures.



## Properties Pane



The screenshot shows a Microsoft PowerPoint presentation titled "Team Sheet.pptx". The main content area displays a project plan for "P2017-01" with a timeline from 2016 to 2018. The plan includes phases like "Projekt-Management", "Planung- und Definitionsphase", "Testbetriebsphase", "Roll-Out Phase", and "Projektabschluss". A "Properties" pane is open on the right, showing details for a selected task: "IT-Test durchgeführt".

**Properties Pane Details:**

- Task:** IT-Test durchgeführt
- Date:** 31.03.2017
- Responsible:** (indicated by a green square)
- Traffic Light:** (indicated by a green square)
- Deliverables:**
  - 100% der Muss-Testfälle IT bestanden
  - 60% der Kann-Testfälle IT bestanden

You may activate the properties pane by

- Click on menu item „Properties“
- Click on a smart milestone or task.

The properties pane shows following information:

**Date:** Tasks – the start and end-date; milestone: the date

**Responsible:** who is responsible for that particular milestone / task. (only if provided in the authoring system)

**Traffic Light:** Color of task / milestone traffic light. If none is provided in the authoring system, a grey color is shown.

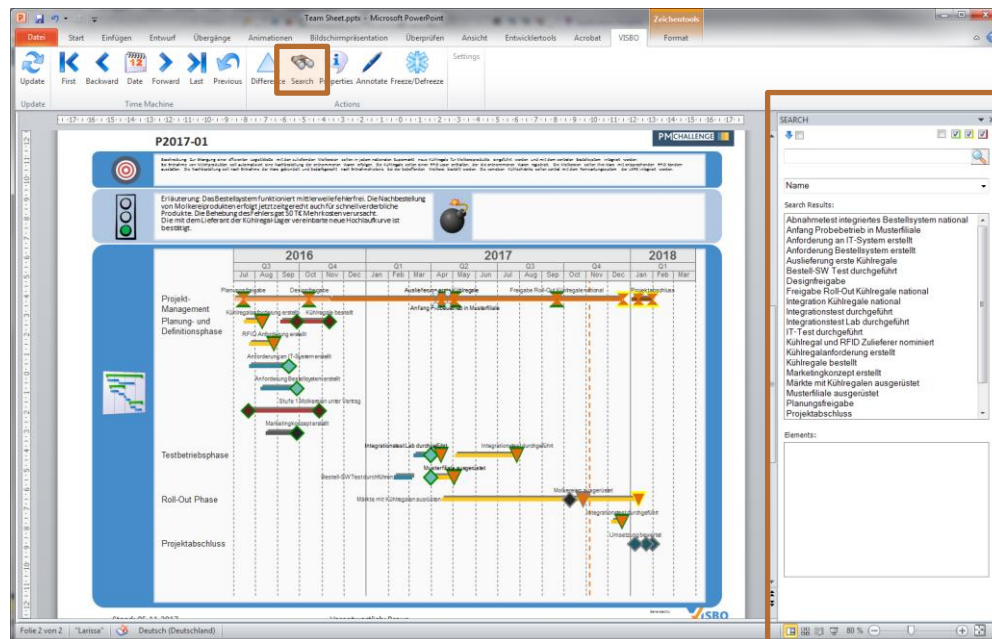
**Traffic Light Explanation:** explanation given by the planer. (only if provided in the authoring system)

**Deliverables:** Deliverables which are assigned to that milestone / task. (only if provided in the authoring system)

Note: when elements are „multi-selected“ nothing is shown in the properties pane. The property pane only shows information to one single element.



## Search Pane



The search Pane is activated by clicking on the search item in the menu.

You may search for milestones and tasks with certain attributes. Searchable attributes are:

- Name
- Responsible
- Overdue
- Deliverables
- Manually moved elements

In the search line you may provide a substring which filters the set of elements. Once you select a traffic light checkbox, only elements are shown applying to the chosen category, the optional substring criteria and the traffic light color looked for.

In general user may choose the category such as name, responsible, etc, then he may further on filter by traffic light color and / or substring.

If several elements match to the given criterias, all the elements are shown in listbox2. Selecting one of the elements highlights the according milestone / task on the powerpoint slide.

You may search following categories:

**Name:** all existing names of milestones / tasks are shown in Listbox 1.

**Responsibilities:** Names of responsible persons are shown. Clicking on one highlights all milestones/ tasks this particular person is responsible for.

**Deliverables:** all deliverables are shown. Clicking on one, highlights the milestone/tasks this deliverable is connected to.

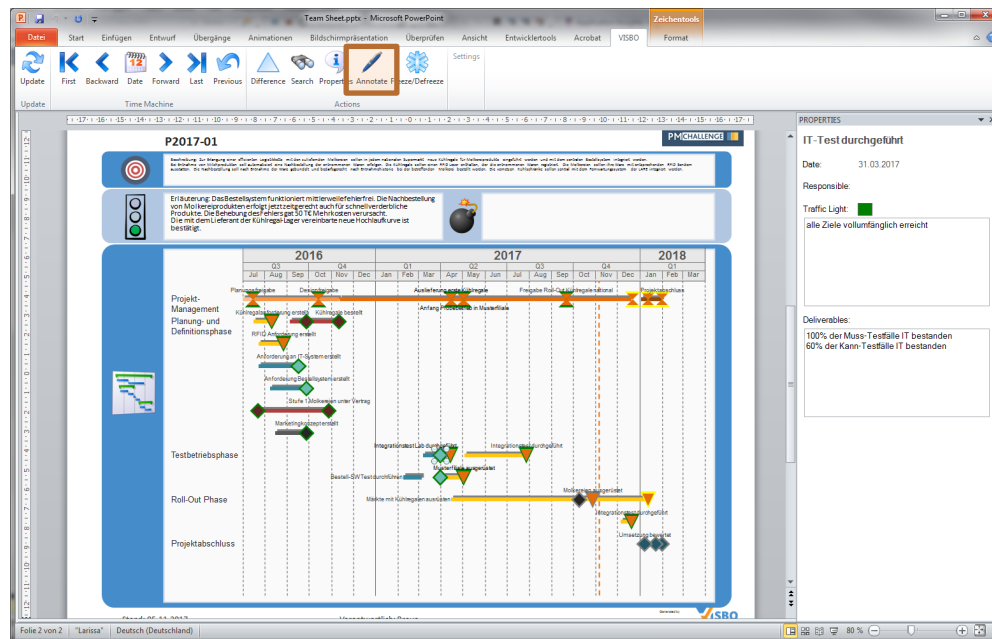
**Overdue:** two options are shown: „Overdue < 30 days“ or „Overdue more than that. Each elements is considered overdue, when its finish date is in the past whereas its „%-Done“ is less than 100%.

**Resources:** all resources are shown which are assigned in one of the tasks. Clicking on one resource shows all tasks where this resource is assigned.

**Manually changed dates:** all elements are shown which have been manually changed in date (by moving them horizontally). Clicking on one highlights the according milestone/task.

Note: If the program does not show a element, you just moved manually in date: please change slide, return back to that slide. Now the elements will be shown in the search pane under category „manually moved“.

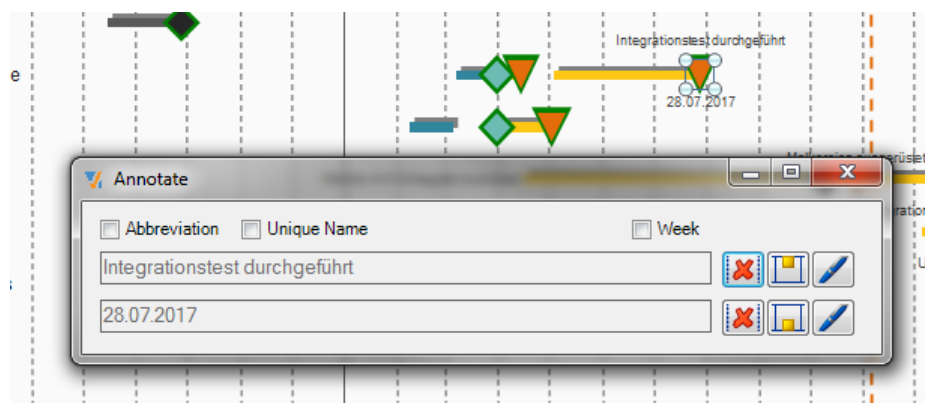
## Annotate



Milestones and tasks may get annotated with name and date by that form. By clicking on the red „X“, the date / name annotation gets deleted again.

The relative position of the annotation may get set by the location icon. Clicking on the location selector icon changes the relative position of the text towards the milestone/task.

Note: location selector icon may only be changed with none or 1 selected item. If you have selected several items for annotation, all items are annotated with the current relative position to their respective task/ milestone.



Users may select one or several elements and annotate them with

- Name
- Abbreviation
- Unique Name
- Date (normal or short version)
- Calendar week

“Unique Name” is useful, when there are elements with the same name on the slide. The option “unique name” adds parent-names of the elements to the name, until the name is unique.

Example: two milestones with name “finalization” are annotated by extension of their parent summary tasks:

1. “Concept Phase – Finalization”
2. “Development Phase – Finalization”

## Create a Report

With the Version starting with V4.1.2 users may create directly from a Powerpoint report template a smart report. Please refer to the Report Templates Description file. With your installation you have received a couple of report templates.

There are following template types. According to the template type users may select one or several projects.

The scheme is always the same:

1. Open a Powerpoint Reporting Template
2. Click "Create" and login to VISBO database.
3. According to template: select one or several projects or project variants
4. Select all or a couple of phases and milestones
5. Optional: define the timeframe, you would like to consider
6. Optional: define reporting parameters such as "extended mode" and the like. These settings are stored for each user individually.
7. <OK> to create the report.

### 1. Open a Powerpoint Reporting Template

#### *Single Project Report Templates*

- Swimlanes2: Phases of project structure Level 1 are shown as Text in the middle of the page. Phases of project structure Level 2 are shown as text on the left side. All phases / milestones on Level 3 etc. are drawn as graphical elements. Form and color of the phases and milestones can either be defined and automatically set according the definition in the appearance classes. For more information please refer to the admin guide.
- Swimlanes: Elements of project structure Level 1 are drawn as Text in the middle of the page. Elements of project structure Level 2 are drawn as text on the left side.
- Einzelprojektsicht: all selected elements are drawn as graphical elements.

#### *Multiproject Report Template*

- Multiprojektsicht: selected elements of each project are drawn as graphical elements. or

#### *Project Management 1-Pager with Time, Budget, Controlling and Quality Information.*

- Companies may define Management 1-Pager report templates from a set of VISBO reporting components such as cost charts, delivery tables, controlling table, project description, team description and maturity grade information about the projects. For details ask your system administrator.

### *Portfolio Resource bottleneck & Utilization Charts*

- Companies may define utilization charts for their department on High-Level or detailed level. The template consists of one or several utilization & process or resource bottleneck charts.

## **2. Click "Create" and login to VISBO database.**

Click Create in the Menu Tab of VISBO Add-In, then Login with your user credentials.

## **3. Select one or several projects or project variants**

When you have opened a single project report template, you may only select one project or project-variant. To select a project, click into the check box and set the mark. If your projects has several variants, you may click on the "+" to see all available variants.

## **4. Select all or a couple of phases and milestones**

To see the whole project structure you may open the structure one by one by clicking the "+". To open it all at one, click on the ">|" Button. To select all at once, click on the "v" Button. Important: When you want to select it all , make sure you have opened the whole structure before.

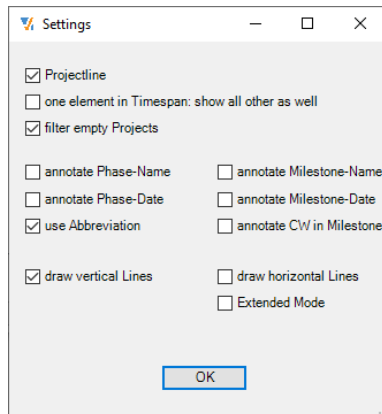
Tipp1: to select all Childs of a certain sub-tree, select/highlight the name of the parent node , then press the key "a". To de-select all, press again "a"

Tipp2: if you want to create a Multiproject report , then you either may select all the elements from each project individually or just click the radiobutton "structure" and select just from the one project left. Then this selection is applied to all projects and elements are shown, if the according projects do have them.

## **5. Optional: define the timeframe, you would like to consider**

By default it is the timeframe the whole project covers , plus a couple of months. If you would like to see only a part of the timeframe just key in the appropriate dates.

## 6. Optional: define reporting parameters



**ProjectLine:** draws for a swimlane resp for a project in Multiprojekt report a dashed line .

**One element in TimeSpan:** show all other: applies only to multiproject reports and definition of calendar. If set, makes sure that the calendar is set so that each project is completely covered by the timeframe.

**Filter empty projects:** project which do not contain at least one of the selected elements are not shown or shown, depending on the setting.

**Annotate Phase/Milestone Name , Phase/Milestone Dates :** annotates the graphical element with its name resp. date. May lead to very "crowded slides". Recommendation is, to afterwards annotate only selected phases / milestones or leave it to the report receiver. Everybody may have different requirements which elements should be annotated.

**Annotate CW in Milestone:** puts an caelnderweek information as text into the milestone.

**Draw vertical lines / horizontal lines:** a grid raster is drawn / not drawn.

**Extended Mode:** if set to false, all elements of a project / swimlane are drawn in "roll-Up Mode", i.e in one line. If set to true, software positions elemnst such that there are no overlapping phases and space occupied is still minimal.

## 7. Press the Button to create the report.

## Add Elements

If you do have already created a VISBO powerpoint report and you would like to add phases or elements to the projects in the report, you may choose from the project structure one or several phases / milestones. Selection mechanisms are the same as described above.

All graphical phases/milestones which are not yet existent on the page are drawn. The system tries to position by trying to find "sister-elements", that is other elements of the same project structure level or one above. If the software cannot identify an appropriate vertical position, the element is placed on top of the page. Please move the element then down to its appropriate position. All of those later added elements are updateable as all other VISBO smart reporting elements.