



THE AGENCY WORKS

Synergist Spotlight on...

Gantt Charts

A useful tool in Synergist that allows you to produce Gantt Charts for a single job or for multiple jobs with flexible printing options

Screen Views

Jobs can be shown sub-divided into phases & stages with a further option to include time estimates. Start and end dates can be amended using the Gantt tool.

Printing

Gantt Charts can be printed either compressed on a single sheet or across multiple pages.

Exporting to Excel

Gantt charts can also be exported to Excel for further amends and additions or to be branded with your company logo etc.

Gantt charts - overview

The Synergist Gantt chart feature is a flexible tool for quickly creating Gantt charts using start and due dates of jobs, phases, schedules & estimates. The Gantt interface makes it easy to re-schedule the dates using simple drag and drop functionality.

Controlling dates

Within the Company Settings for Synergist you have various options for driving dates. For instance, you might want the **job start and due dates** to be automatically set to the extremes of any scheduled tasks set up on the job. Alternatively, you may want the **phase start and due dates** to be the controlling dates.

(Please see the Advanced Tab, Date Controls sections within Company Settings for more information on this)

Displaying a Gantt

You can display a Gantt Chart from the following list and input screens:



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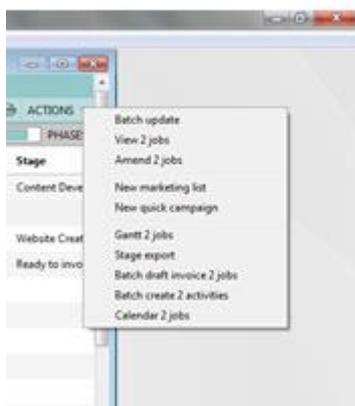
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- **Jobs**
- **Phases**
- **Schedule stages**
- **Projects**
- **Sub-projects**

Example using the job list

Highlight two jobs in the list and click "**Gantt 2 jobs**" from the actions menu

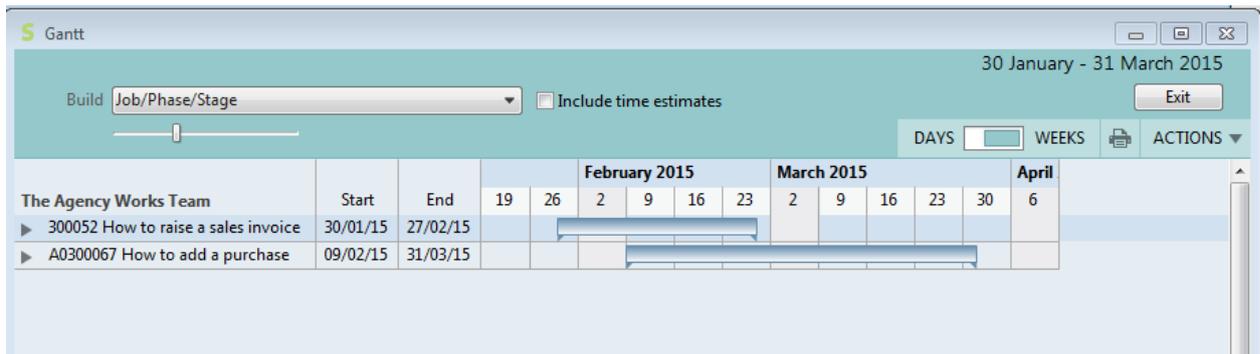
Job number	Client	Handler	Description	Date due	%	Status	Stage
300052	The Agency Works Team	LH	How to raise a sales invoice	01/04/2015		Live	Content Develop
A0300067	The Agency Works Team	LH	How to add a purchase invoice	28/01/2015	93%	Live	
300068	All England Netball Associat	LH	Quarter one 2015 advertising	31/03/2015	210%	Live	Website Creativ



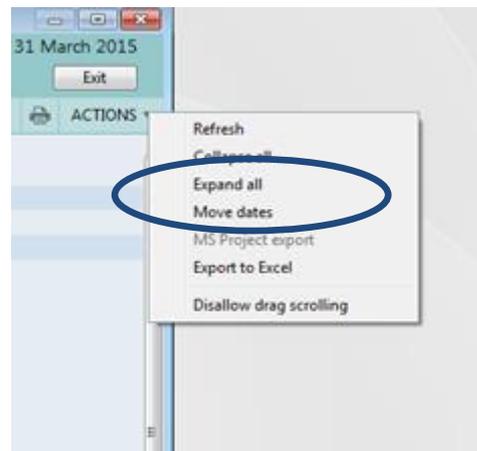
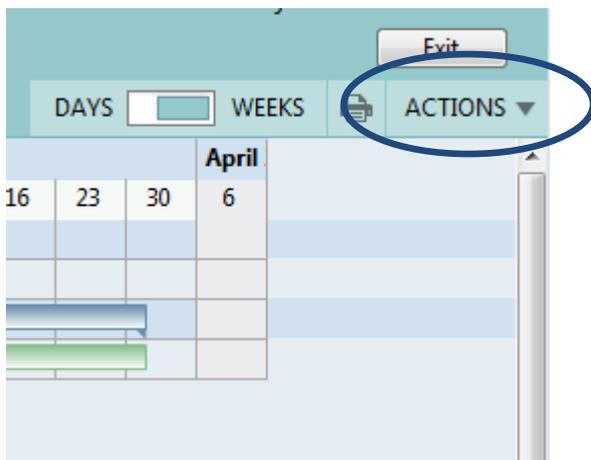
Click on the Actions button at the top right of the screen, then select Gantt 2 jobs from the options list.

This will produce a Gantt “rolled up” to just show the job level as a blue line.



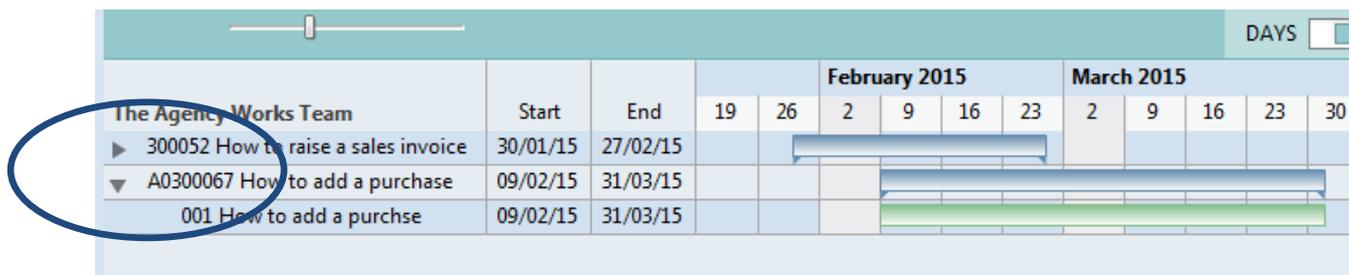


If you wish to see more detail click the **actions button** and select "expand all".



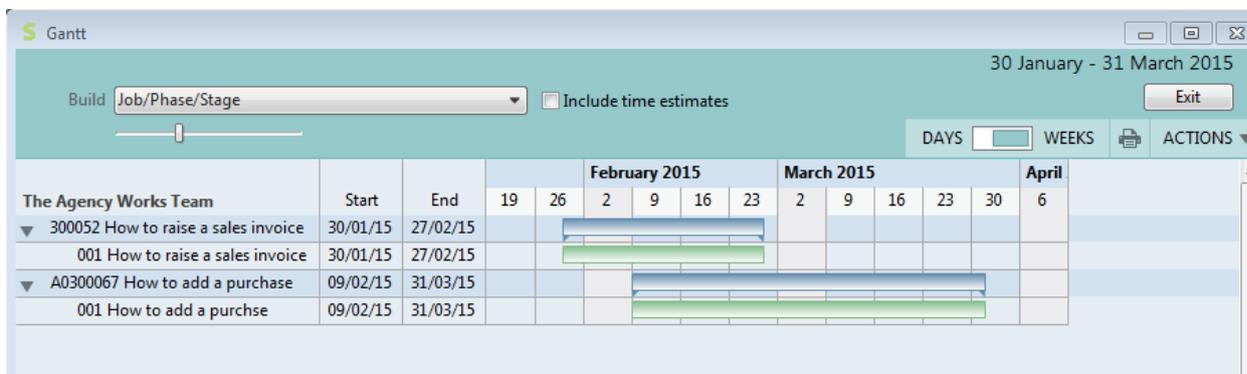
Or

Click the arrow heads that are to the left of the job numbers





This will display the full Gantt chart with all the levels displayed.

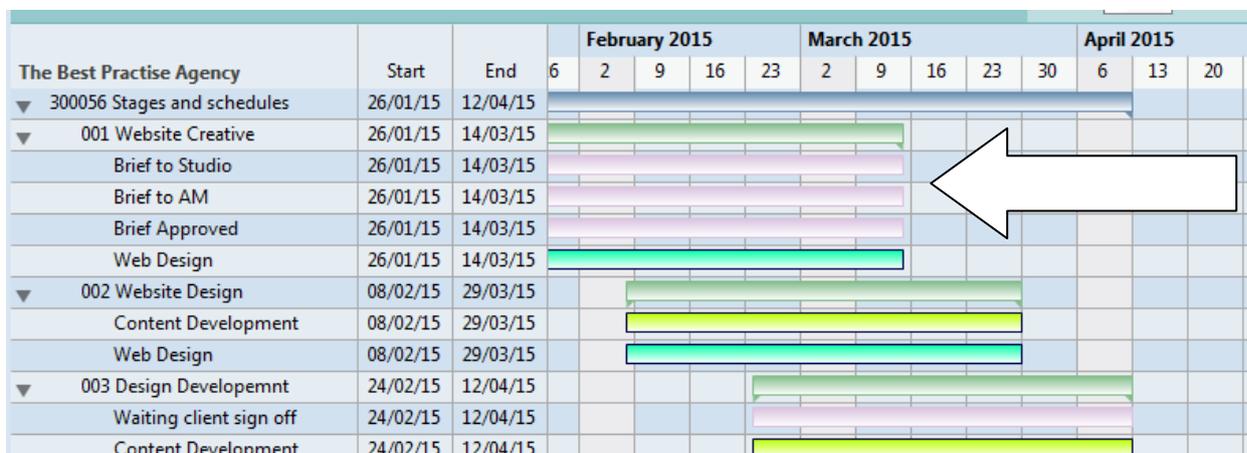


Note: Synergist Gantt Charts use this standard colour scheme

- Jobs - blue
- Phase - green
- Schedule tasks/Stages - user definable colours
- Estimates - pink

Creating a Gantt for a more complex job

In this example below, the job is a 2-tier style job with phase level stages and estimates showing.

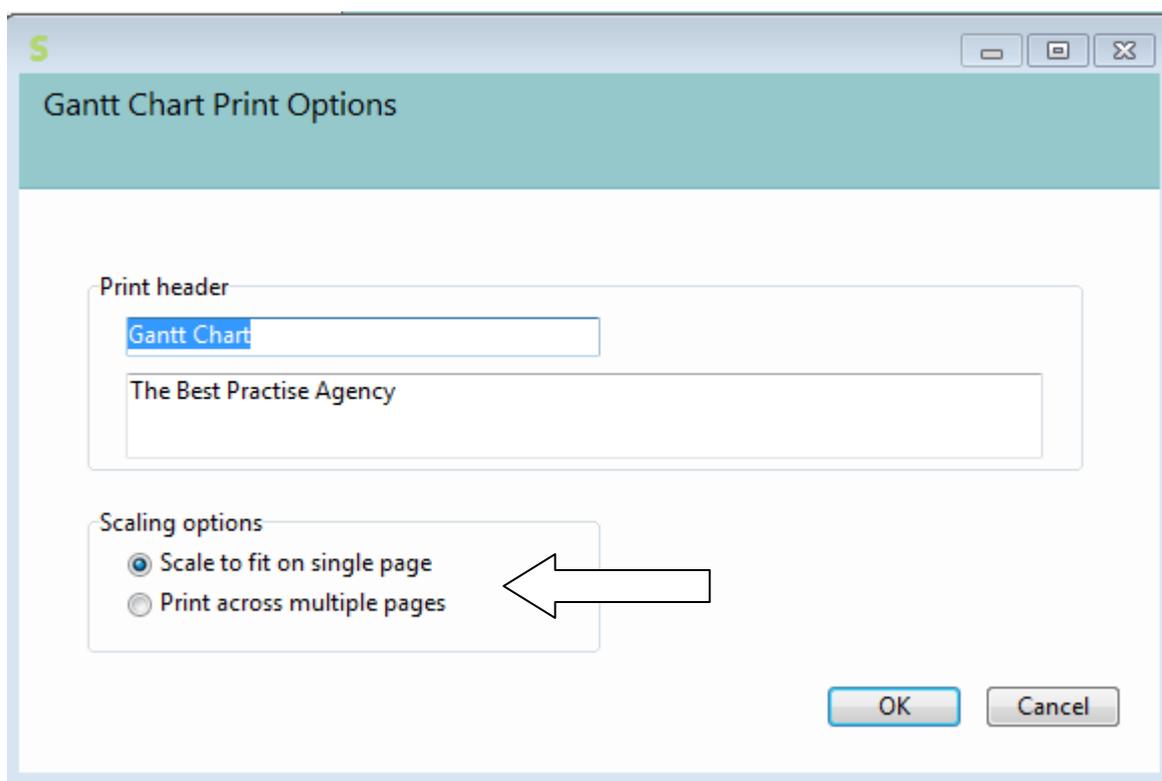




Printing the Gantt

When you print a Gantt you get the option to temporarily amend the titles
(NB this is not saved with the Gantt since the Gantt is dynamically re-created every time it is loaded).

You can print your entire Gantt on a single page or spread it over several pages by selecting the preferred option from the “scaling options”.



The example below has been created as a PDF file.



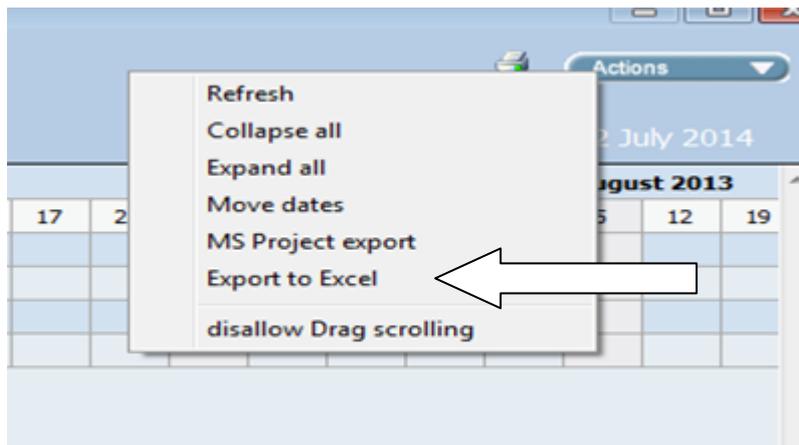


Spring Work Schedule

The Best Practise Agency

	Start	End	February 2015					March 2015					April 2015				May 2015	
			19	26	2	9	16	23	2	9	16	23	30	6	13	20	27	4
300056 Stages and schedules	26/01/15	12/04/15																
001 Website Creative	26/01/15	14/03/15																
Brief to Studio	26/01/15	14/03/15																
Brief to AM	26/01/15	14/03/15																
Brief Approved	26/01/15	14/03/15																
Web Design	26/01/15	14/03/15																
002 Website Design	08/02/15	29/03/15																
Content Development	08/02/15	29/03/15																
Web Design	08/02/15	29/03/15																
003 Design Developemnt	24/02/15	12/04/15																
Waiting client sign off	24/02/15	12/04/15																
Content Development	24/02/15	12/04/15																
300076 Spring POS	09/03/15	03/04/15																
001 Planng	09/03/15	03/04/15																
002 Creative (Project)	09/03/15	03/04/15																
003 Print (Project)	09/03/15	03/04/15																
004 Production	09/03/15	03/04/15																

Exporting to Excel

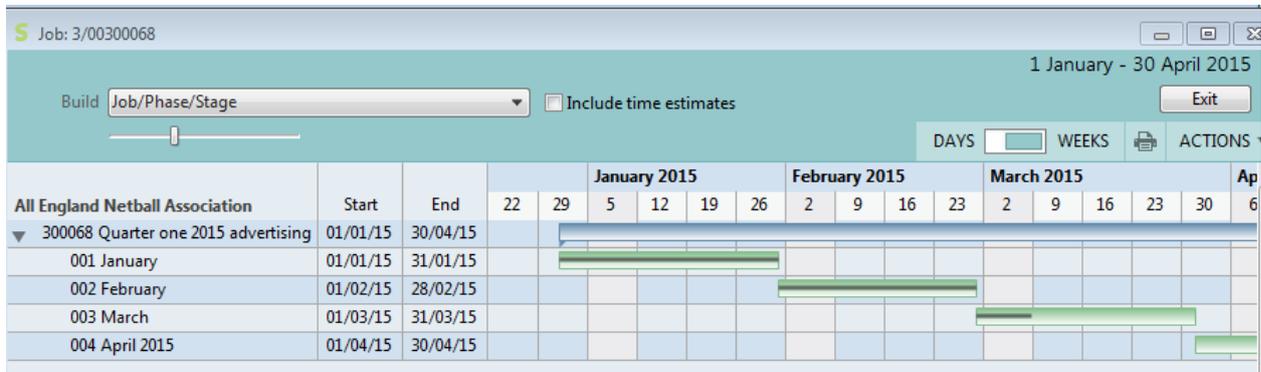


You also have the option to export to excel; the colours showing on the Gantt in Synergist are supported with the export to excel.





- Gantt charts have been enhanced to show the % complete of job/phases/stages/estimates and MS Project-like strike-through for completed tasks.
- Week numbers added if column width is wide enough



The percentage complete feature is a manually indicator of how much of something has been completed. This can be entered into the ‘% complete’ field on the financial page of the job or phase.

If you are also using ‘stages, then a stage can be marked as completed too.

	Financial	Time	Materials	Purch. & exp.	Estimate	Quote	Pending	Activi
	Estimated cost	Actual cost	Est. rec. charge	Act. rec. charge				
staff	470.00	0.00	750.00	£0.00				
ials	0.00	0.00	0.00	0.00				
ises	0.00	0.00	0.00	0.00				
total	470.00	0.00	750.00	0.00				

% Complete	25%		
Completed	<input type="checkbox"/> By	Date	00/00/00
Final invoiced	<input type="checkbox"/> By	Date	00/00/00





Date Controls

There is a setting that allows for date controls to be applied. These are essential if you wish to produce capacity reports via Synergist but also can be useful for updating dates within the Gantt chart using the 'drag' facility to move the job (blue) or phase (green) Gantt lines.

Phase custom Alerts Forced/blocked Time sheets **Advanced**

Date controls

- None - no date dependencies
- Job driven - phase, stage and estimate dates not enterable, and always reflect job dates
- Phase driven - stage and estimate dates not enterable and always reflect phase dates. Job dates reflect extremes of phase dates.
- Stage driven - estimate dates not enterable and always reflect stage dates. Phase dates reflect extremes of stage dates, job dates reflect extremes of phase dates.
- Estimate driven - stage, phase and job dates reflect extremes of estimate dates.

This setting is located within the Company settings on the advanced tab but should not just be 'switched on' as it will affect the ability to update job or phase dates by all users, depending on the setting required.

**Please contact the Synergist helpdesk on 01625577018 or
The Agency Works on 01455 553246
if you wish to discuss this further.**

