

Tutorials

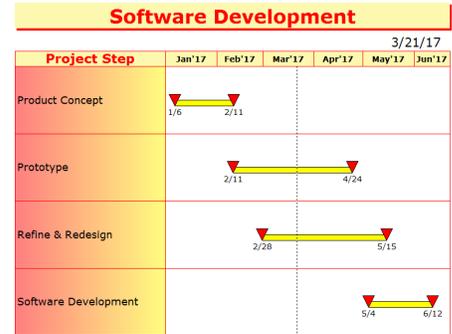
Lesson 7 - Show Progress

In this lesson you will learn how to:

- Turn on *Symbol and Bar Fill To Status Date*.
- Customize after status properties.
- Set % complete for individual bars and symbols.
- Set % complete for a task.
- Define a *status symbol* in the toolbox and show a project is ahead or behind schedule using a status symbol.
- Add a % complete column with a pie indicator.

Open the schedule for this lesson

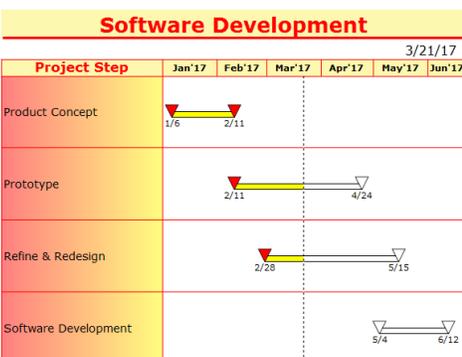
1. On the toolbar choose the **File** tab.
2. In the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Open**. Choose **Lesson Chart**.
3. Select **Lesson 7 Starter Schedule.mif**.
4. Save the schedule to an accessible folder on your hard drive, such as your **Documents** folder. Choose **File**. In the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Save As ...** choose **Chart**. You will now be able to work with and save the lesson schedule.



Lesson 7 starter schedule

Turn on Symbol and Bar Fill To Status Date

When **Fill to Status Date** is turned on for symbols and bars, the symbols and bars are filled with their defined colors up to the status date for the task. (By default, this is the current date). After the status date, they are hollow or use a user specified *after status color* to indicate future, incomplete activity.



Symbols and bars filled to status date

The current date for the example schedule is 3/21/17. The current date is illustrated by the vertical dotted line on the schedule.

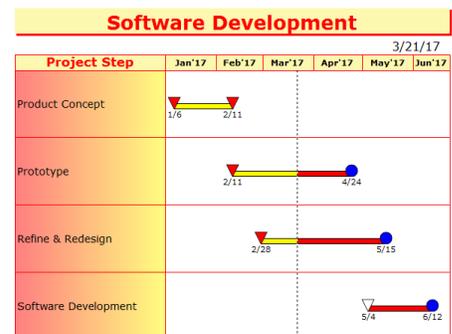
Turn on Fill to Status Date

1. Click the **Dates** tab.
2. In the **Date Related Settings** **Symbols: Fill to Status Date**.
3. In the **Date Related Settings** **Bars: Fill to Status Date**.

Customize the after status properties

The incomplete portion of the bar (after status) can be filled with a color other than white. After status symbols can be filled with a color or be a different shape. When complete, the symbol will change back to the original symbol in the toolbox.

1. In the toolbox, double-click the yellow bar. The **Bar Options** dialog box displays.
2. Under **AFTER STATUS (Incomplete): Fill Color**: select the color rectangle to open the color palette and choose **red**.
3. Press **OK**.
4. In the toolbox, double-click the upside down red triangle on the right. The **Symbol Options** dialog box will display.
5. Choose the **Color/Pattern/Size/Shadow** tab.
6. Select the color rectangle below **After Status (incomplete) Color** to open the color palette and choose **blue**.
7. Change the **After Status (incomplete) Shape**: to shape #4 (a circle) and click OK. Notice that the symbols which are after the status date (incomplete) have changed. Also, the incomplete portion of the bar is now red.



With custom after status fill color

Define a status symbol in the toolbox

Project tasks may not all be on time. You may need to indicate one or more of the steps as ahead or behind schedule. A "status" symbol is one way of controlling how much each task is ahead or behind. A status symbol can be any symbol in your toolbox, including a null (invisible) symbol.

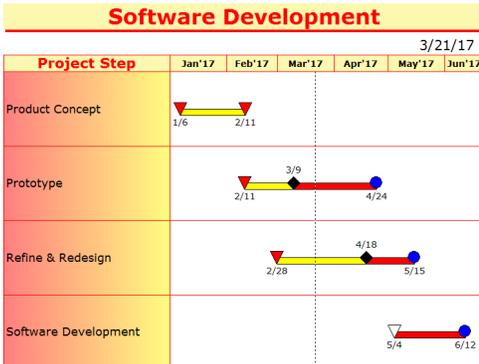
1. In the **toolbox**, double-click the black diamond symbol (first symbol second row). The **Symbol Options** dialog box displays.
2. On the **Symbol Shape** tab, click on the radio button next to **Status Symbol (used for Percent Complete)** so that it is selected. Click **OK**.

Show a project is ahead or behind schedule with a status symbol

Change "Prototype" to be Behind Schedule

1. In the toolbox, click once on  (the plus tool).
2. In the toolbox, click once on the black diamond symbol.
3. Move your cursor to the **Prototype** task row in the schedule area between the red 2/11 triangle and the blue 4/24 circle.
4. Click and hold the left-mouse button, and then drag until you see the **3/9/17** date next to the cursor (as shown) or in the status bar at the bottom left of the milestones window. Release the mouse button to add the status symbol.

 The S next to the crosshairs cursor indicates that you are about to add a Status Symbol. The % next to the cursor reminds you that the status symbol controls percent complete.



Ahead or behind using status symbol

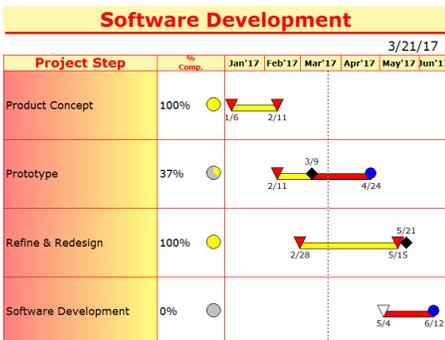
Change "Refine & Redesign" to be Ahead of Schedule then complete.

1. In the toolbox, click once on  (the plus tool).
2. In the toolbox, click once on the black diamond symbol.
3. Click and drag to add the status symbol on **4/18/2017** to the **Refine & Redesign** task row. **Refine & Redesign** is now ahead of schedule.
4. Now select  in the toolbox. On the schedule, select the black diamond on the Refine & Redesign row, and move it to **5/21/2017**. The entire bar will be colored red and the blue circle will change back to the original symbol (a red triangle) indicating the task is complete.



Add a percent complete column with a percent indicator symbol

1. Click the **Insert** tab.
2. In the **Rows, Columns** section choose **New Column**.
3. From the menu choose **Percent Complete**. The **Percent Complete Settings** dialog box appears.
4. Under **Display Settings** **Include Percent Complete Symbol in column**.
5. Under **Display Settings** choose **Symbol on Right**.

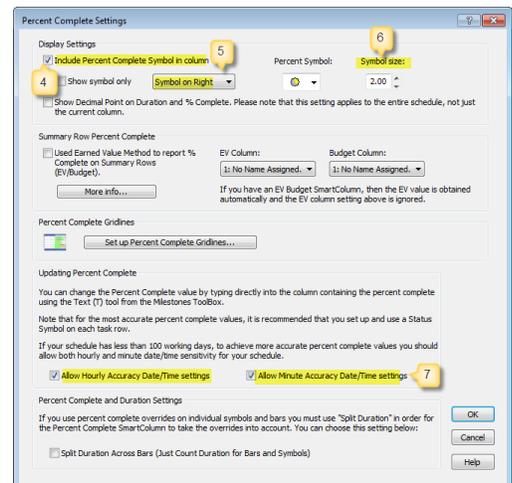


Percent complete column and symbol

6. For **Symbol Size**, scroll to **2.00**.

7. In **Updating Percent Complete** section **Allow Hourly Accuracy Date/Time Settings** and **Allow Minute Accuracy Date/Time Settings**. These options allow more accurate percent complete.

8. Press **OK**. Then **OK** again.



Percent complete settings dialog box

Adjust the status of a task by changing the percent complete value

1. Click  in the toolbox.
2. On the **Prototype** task row in the **% complete** cell click and backspace through the 37% Complete.
3. Type **75**.
4. Press **Enter** on the keyboard.

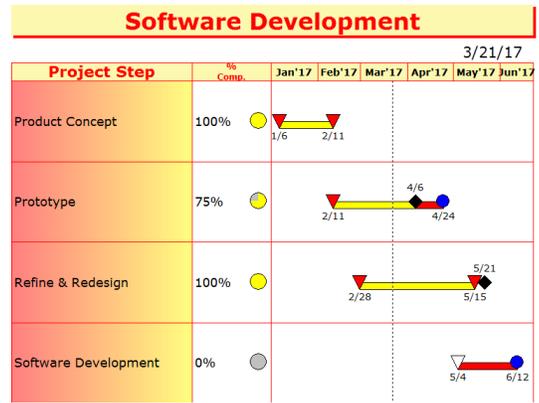
The **Prototype** percent complete pie symbol has changed to reflect 75% complete and the bar on the schedule is now shaded by 75%. Also, the status date has changed from 3/9 to 4/6.

There is another way to change the status for a task: Click the Arrow tool in the toolbox. Then click and drag the status symbol to the updated location. The percent complete reading will change to match the new status symbol placement.

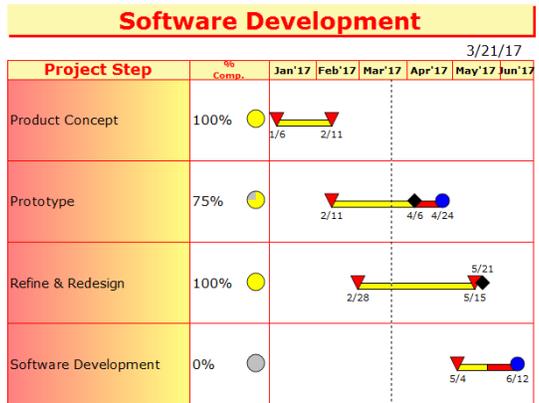
Set percent complete for individual bars and symbols

1. Click  in the toolbox.
2. On the **Software Development** task row click the white triangle on 5/4. The toolbar changes to the **Selection** tab with **Current Object: Symbol**.
3. Choose the small **Size/Color** tab at the bottom of the toolbar.
4. In the **Override Symbol and Bar Colors** section find **1st Bar Fill %**.
5. In the box next to **1st Bar Fill %** select ▼ (the drop down arrow) scroll to **50%** and select it.

The 5/4 triangle symbol will now be colored red and the bar will be filled yellow to 50%.



Adjusting status using the % complete column



Percent complete set for individual bars

When setting % complete for individual bars and symbols, set the option **Split Duration Across Bars**. This is necessary for accurate % complete calculation in a % complete column.

Right-click a % complete column's heading and choose **Properties**. In the **Column Properties** dialog, click **Properties**. The setting is found at the bottom of the **Percent Complete Settings** dialog box.

