

Milestones PROFESSIONAL[®] TUTORIALS

Lesson 14 - Values SmartColumns

In this lesson you will learn how to:

- Create a Values SmartColumn with Indicators.
- Set-up the Indicators for Values SmartColumn.
- Enter Sales Values for Values SmartColumn to Display Indicators.

FOUR MONTH SALE REPORT

		January	February	March	April	Sales\$/Indicator
SALES ASSOCIATES	HERMAN					\$100,000 ACE
	BAKER					\$75,000 ★
	SANCHEZ					\$30,000 ◆
	ROBERTS					\$29,000 ✓
	JOHNSON					\$150,000 ACE
	LANDIN					\$74,000 ◆

✓ < \$30,000 ◆ =or> \$30,000 < \$75,000
★ =or> \$75,000 < \$100,000 ACE =or> \$100,000

A Values SmartColumn can contain numbers and/or indicator symbols based on the numbers from the same column or another column with values.

In this lesson the Values will be entered in to a the Sales \$/Indicator SmartColumn and indicators will display in the column based on the sales dollar amount.

Indicators can be symbols, a colored cell and/or text.

Open the Schedule for this Lesson.

1. On the toolbar, choose **File**.
2. In the **Files and Templates: Open and Save Options** section select **Open Samples or Lessons**. The **Open a Sample Chart** dialog displays.
3. Under **Select a Folder below to Open**, go to the bottom of the list and select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 14 Starter Schedule.mlh**.
5. Save the schedule to an accessible folder on your computer. Choose the **File** tab. In the **Files and Templates: Open and Save Options** section, choose **Save As...** In the menu that displays choose **Chart**. Name, then save the schedule.

FOUR MONTH SALE REPORT

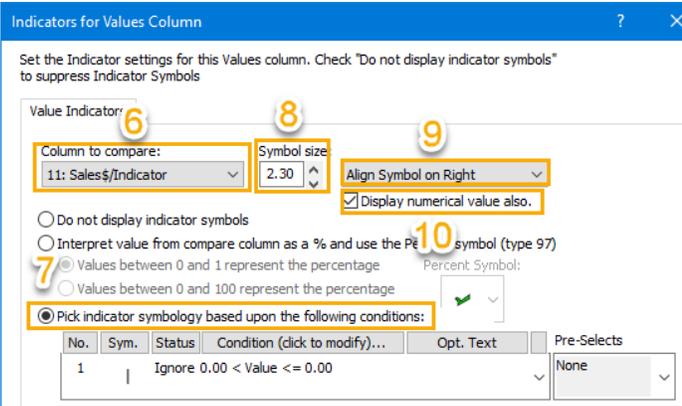
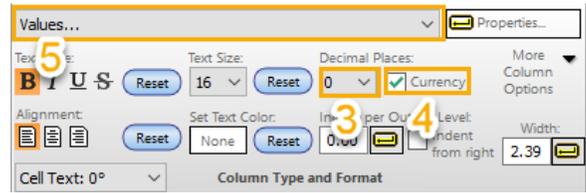
		January	February	March	April	Sales\$/Indicator
SALES ASSOCIATES	HERMAN					
	BAKER					
	SANCHEZ					
	ROBERTS					
	JOHNSON					
	LANDIN					

✓ < \$30,000 ◆ =or> \$30,000 < \$75,000
★ =or> \$75,000 < \$100,000 ACE =or> \$100,000

Create a Values SmartColumn with Indicators

You will make the **Sales\$/Indicator** column a **Values SmartColumn**

- Using the (↶) **Arrow** tool in the toolbox, click the **Sales\$/Indicator** column heading. The toolbar will change to the **Selection** tab with **Current Object: Column Heading**.
- Choose **Switch to Column**.  The toolbar will change to the **Selection** tab with **Current Object: Column 11**.
- In the **Column Type and Format** section under **Decimal Places**: choose **0** and
- In the **Column Type and Format** section under **Decimal Places**: **Currency**.
- In the **Column Type and Format** section click the **down arrow** in the field showing (none). Scroll and choose **Values**. The **Indicators for Values Column** dialog box displays.



- For **Column to Compare** note that **11: Sales\$/Indicator** is selected since it is the column selected this works for this tutorial as we want the indicators to display in this column when the sales figures are added to this column.
- Choose **Pick indicator symbology based upon the following conditions**. We will set up the indicators in the next section of the tutorial.

A Values SmartColumn can contain numbers and/or indicator symbols based on the numbers from the same column or another column with values.

- You will now be able to set the **Symbol size to 2.30**.
- Choose **Align Symbol on right**.
- Display numerical value also** to have the column display the added numerical value along with the indicator (keep this dialog box open for the next set of instructions).

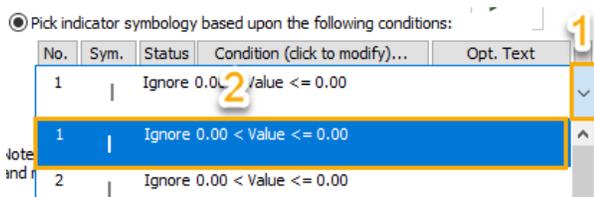
Set-Up Indicators for Values SmartColumn

Symbol indicators

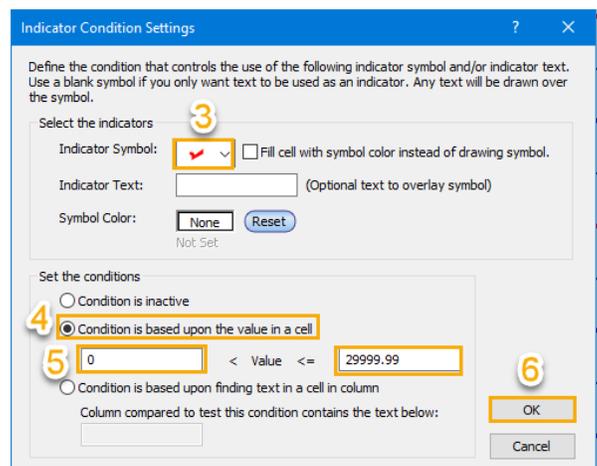
You will assign indicator symbols to sales figures for sales <\$30,000, =or> \$30,000 < \$75,000 and =or> \$75,000 < \$100,000

Indicator for sales <\$30,000

- Under **Pick indicator symbology based upon the following conditions**: click **the down arrow** to see 20 Active/Ignored symbols and their conditions.



- Click on **1 | Ignore 0.00 < Value <= 0.00** in the list. The **Indicator Condition Settings** dialog displays.
- Click on the **Indicator Symbol down arrow**, from the drop down list of symbols choose the **red checkmark**.
- Choose **Conditions based upon the value in a cell**.
- Enter **0** and **29999.99**.
- Choose **OK** to return to the **Indicators for Values Column** dialog box (keep this dialog box open for the next set of instructions).



Set-Up Indicators for Values SmartColumn Cont'd

Symbol indicators cont'd

Indicator for sales =or> \$30,000 < \$75,000

● Pick indicator symbology based upon the following conditions:

No.	Sym.	Status	Condition (click to modify)...	Opt. Text
1	✓	Active	0.00 < Value <= 29999.99	
1	✓	Active	0.00 < Value <= 29999.99	
2		Active	0.00 < Value <= 0.00	
3	.	Ignore	0.00 < Value <= 0.00	

- Under **Pick indicator symbology based upon the following conditions:** click the **down arrow** to see 20 Active/Ignored symbols and their conditions.
- Click on **2 | Ignore 0.00 < Value <=0.00** in the list. The **Indicator Condition Settings** dialog displays.
- Click on the **Indicator Symbol down arrow**, from the drop down list of symbols choose the **silver diamond**.
- Choose **Conditions based upon the value in a cell**.
- Enter **29999.99** and **74999.99**.
- Choose **OK** to return to the **Indicators for Values Column** dialog box (keep this dialog box open for the next set of instructions).

Indicator Condition Settings

Define the condition that controls the use of the following indicator symbol and/or indicator text. Use a blank symbol if you only want text to be used as an indicator. Any text will be drawn over the symbol.

Select the indicators

Indicator Symbol: Fill cell with symbol color instead of drawing symbol.

Indicator Text: (Optional text to overlay symbol)

Symbol Color: Not Set

Set the conditions

Condition is inactive

Condition is based upon the value in a cell

< Value <=

Condition is based upon finding text in a cell in column

Column compared to test this condition contains the text below:

Indicator for sales =or> \$75,000 < \$100,000

● Pick indicator symbology based upon the following conditions:

No.	Sym.	Status	Condition (click to modify)...	Opt. Text
1	✓	Active	0.00 < Value <= 29999.99	
1	✓	Active	0.00 < Value <= 29999.99	
2	◇	Active	29999.99 < Value <= 74999.99	
3		Ignore	0.00 < Value <= 0.00	
4	.	Ignore	0.00 < Value <= 0.00	

- Under **Pick indicator symbology based upon the following conditions:** click the down arrow to see 20 Active/Ignored symbols and their conditions.
- Click on **3 | Ignore 0.00 < Value <=0.00** in the list. The **Indicator Condition Settings** dialog displays.
- Click on the **Indicator Symbol down arrow**, from the drop down list of symbols choose the **gold star**.
- Choose **Conditions based upon the value in a cell**.
- Enter **74999.99** and **99999.99**.
- Choose **OK** to return to the **Indicators for Values Column** dialog box (keep this dialog box open for the next set of instructions).

Indicator Condition Settings

Define the condition that controls the use of the following indicator symbol and/or indicator text. Use a blank symbol if you only want text to be used as an indicator. Any text will be drawn over the symbol.

Select the indicators

Indicator Symbol: Fill cell with symbol color instead of drawing symbol.

Indicator Text: (Optional text to overlay symbol)

Symbol Color: Not Set

Set the conditions

Condition is inactive

Condition is based upon the value in a cell

< Value <=

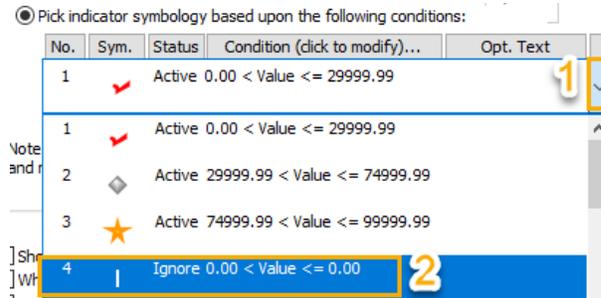
Condition is based upon finding text in a cell in column

Column compared to test this condition contains the text below:

Set-Up Indicators for Values SmartColumn Cont'd

Text and colored cell indicators

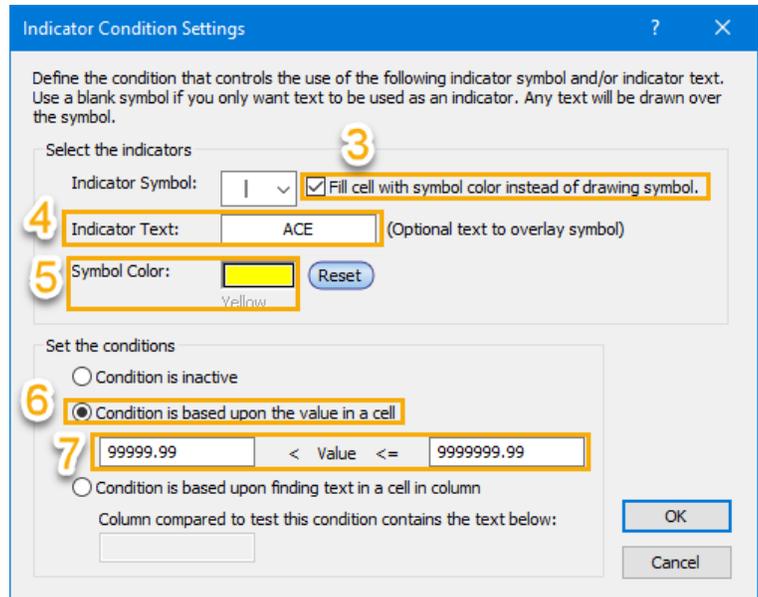
Indicators for sales => \$100,000



1. Under **Pick indicator symbology based upon the following conditions:** click **the down arrow** to see 20 Active/Ignored symbols and their conditions.
2. Click on **4 | Ignore 0.00 < Value <=0.00** in the list. The **Indicator Condition Settings** dialog displays.
3. Next to **Indicator Symbol** **Fill Cell with symbol color instead of drawing symbol.**
4. For **Indicator Text** select **the space bar 7 times then enter ACE.**

Entered text defaults to the cell's center. For this indicator text needs to be to the right of the cell, thus using the space bar to position the text.

5. For **Symbol Color** select **Yellow.**
6. Choose **Conditions based upon the value in a cell.**
7. Enter **99999.99** and **9999999.99.**
8. Choose **OK** to return to the **Indicators for Values Column** dialog box.



9. Click **OK** again to return to the schedule. Nothing will have changed. You will enter the sales values in the next step, which will then display the set-up indicators in the column.

Enter Sales Values in the Values SmartColumn to Display Indicators

1. Click the (T) **Text** tool in the toolbox.
2. Click once in **the first cell** of the **Sales\$/Indicator** column for Herman.
3. Enter **100000.**
4. Press **Enter**. The cell will populate with the value as currency and the indicator for => \$100,000 will display.



5. Continue by entering the following values for each cell
Baker **75000**, Sanchez **30000**, Roberts **29000**, Johnson **150000**, Landin **74000** **after entering this value do not press enter just click out of the cell.** This prevents creating a new page.
6. Upon completion of entering all values the schedule will look like the schedule on the first page of the tutorial.