

Milestones PROFESSIONAL[®] TUTORIALS

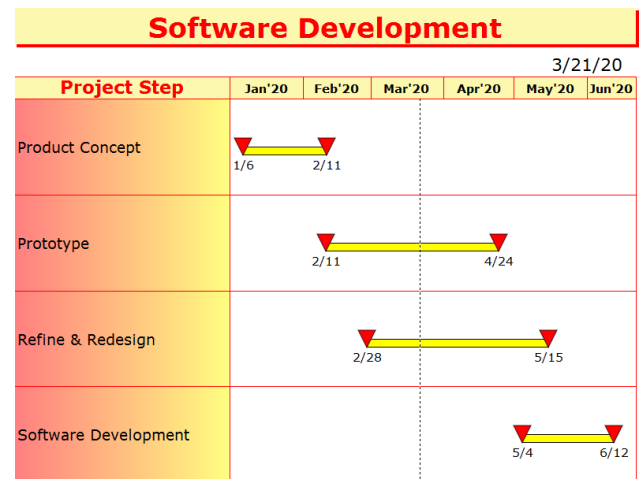
Lesson 7 - Show Progress

In this lesson you will learn how to:

- Turn on Symbol and Bar Fill To Status Date.
- Customize after status properties.
- Define a status symbol in the toolbox
- Show ahead or behind using a status symbol
- Add a % complete column with a % indicator symbol
- Change task status by changing the % complete value
- Set % complete for individual bars and symbols
- Add a % complete value to a task in the schedule area

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**, select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 01 Starter Schedule.mlj**.
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.



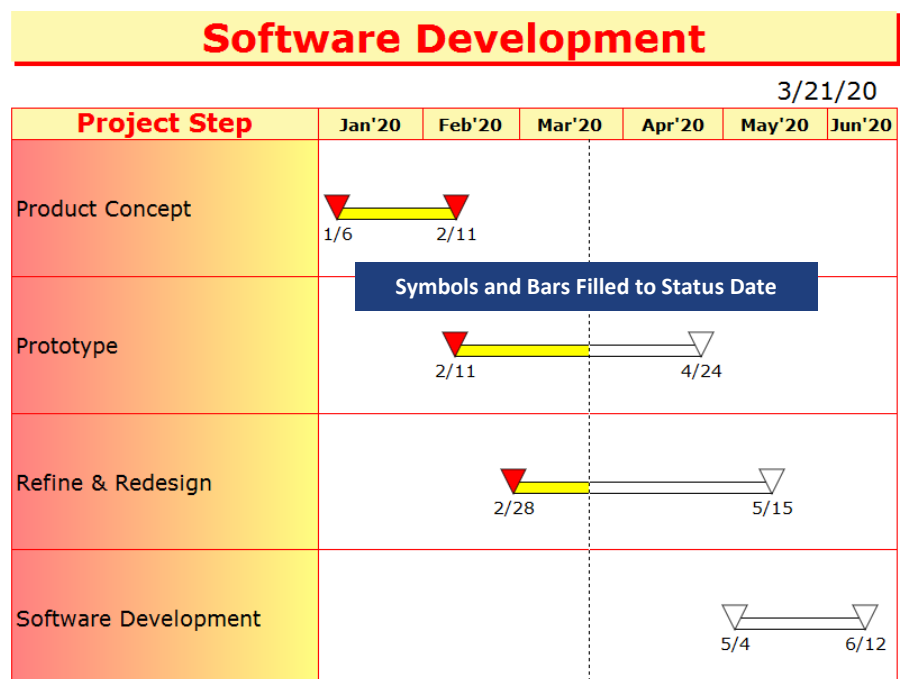
Symbol and Bar Fill To Status Date

When **Fill to Status Date** is turned on for symbols and horizontal 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.

The current date for the example schedule is 3/21/20. 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** check on **Symbols: Fill to Status Date**.
3. In the **Date Related Settings** check on **Bars: Fill to Status Date**.

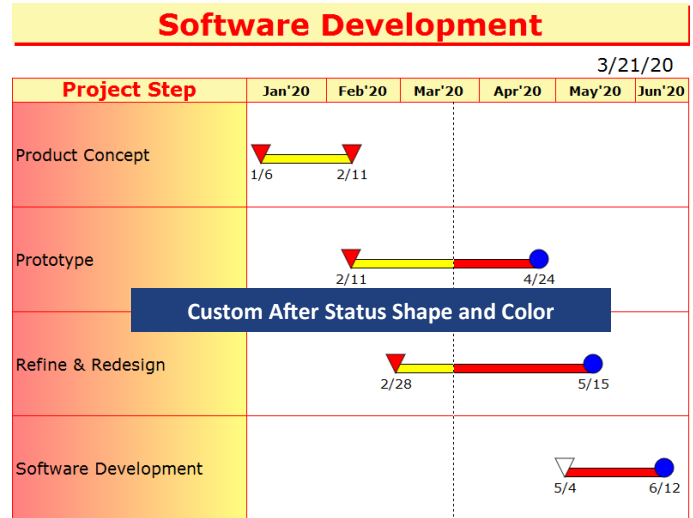


Customize the after status properties

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**. The incomplete portion of the bar is now red.
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).

The symbols available for the after status shape are the symbols from the toolbox.



8. Click **OK**. The symbols which are after the status date (incomplete) have changed to a blue circle. Once the task is complete the bar will fill in yellow and the blue circle will become a red upside down triangle, like the **Product Concept** task.

Define a status symbol in the toolbox

Project tasks 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.

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

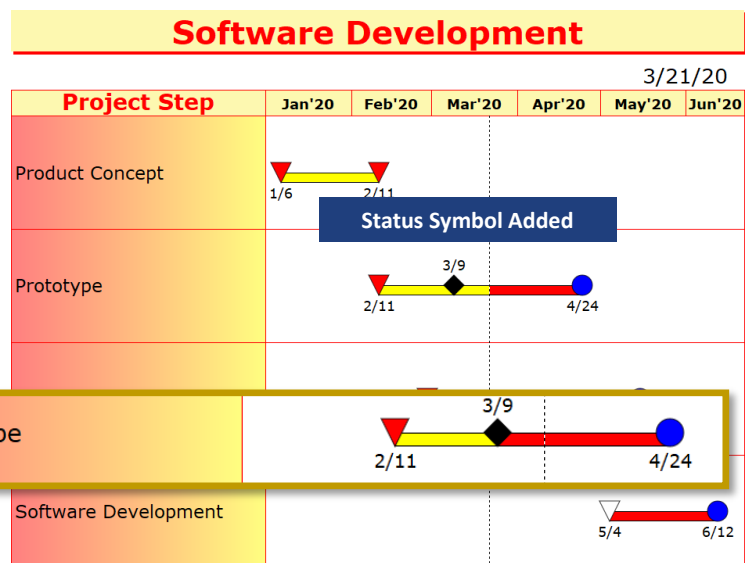
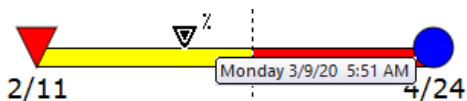
Show ahead or behind using a status symbol

Change "Prototype" to be Behind Schedule

1. Click the (+) **Large Plus** tool in the toolbox.
2. In the toolbox, click once on the **black diamond symbol**, it will highlight.
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.

The $\frac{S}{\%}$ 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.

4. Click and hold the left-mouse button, and then drag until you see the **3/9/20** date next to the cursor (as shown) or in the status bar at the bottom left of the milestones window.



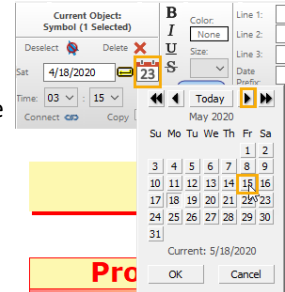
5. Release the mouse button to add the status symbol.

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

1. In the toolbox, click the (+) **Large Plus** tool in the toolbox.
2. In the toolbox, click once on the **black diamond** symbol, it will highlight.
3. Click and drag to add the status symbol on **4/18/20** to the **Refine & Redesign** task row. **Refine & Redesign** is now ahead of schedule.

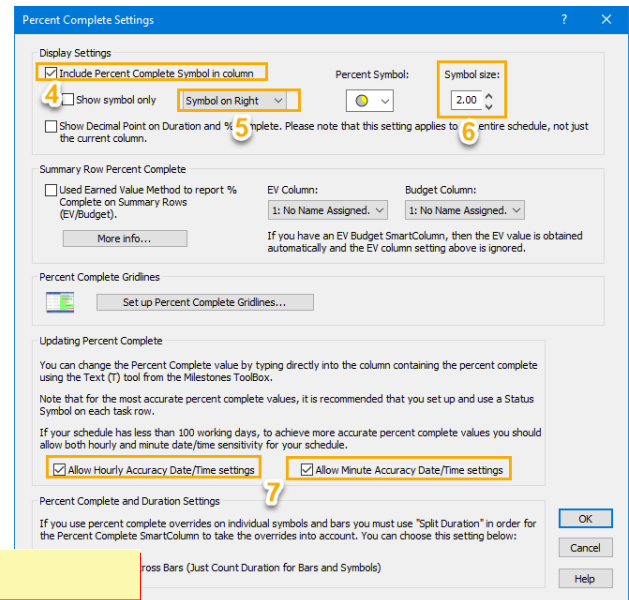


4. Select the (↶) **Arrow** tool in toolbox. On the schedule, in the **Refine & Redesign** select the **black diamond**. The toolbar is now active for that symbol. In the toolbar, select the calendar icon and change the symbol's date to **5/15/20**. The task is now complete, the entire bar will be colored yellow and the blue circle will change back to the original symbol (a red triangle).



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 displays.
4. Under **Display Settings** check on **Include Percent Complete Symbol in column**.
5. Under **Display Settings** choose **Symbol on Right**.
6. For **Symbol Size**, scroll to **2.00**.
7. For accurate percent complete. In **Updating Percent Complete** section check on **Allow Hourly Accuracy Date/Time Settings** and **Allow Minute Accuracy Date/Time Settings**.
8. Select **OK**. Then **OK** again. A percent complete column with percent values and pies will be added.



Software Development

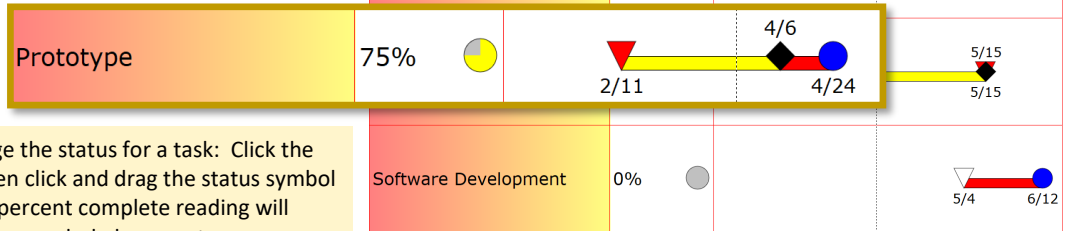
		3/21/20					
Project Step	% Comp.	Jan'20	Feb'20	Mar'20	Apr'20	May'20	Jun'20
Product Concept	100%						
Prototype	37%						
Refine & Redesign	100%						
Software Development	0%						

Percent Complete Column with Values and Pies

Change task status by changing the percent complete value

1. Click the (T) **Text** tool 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.

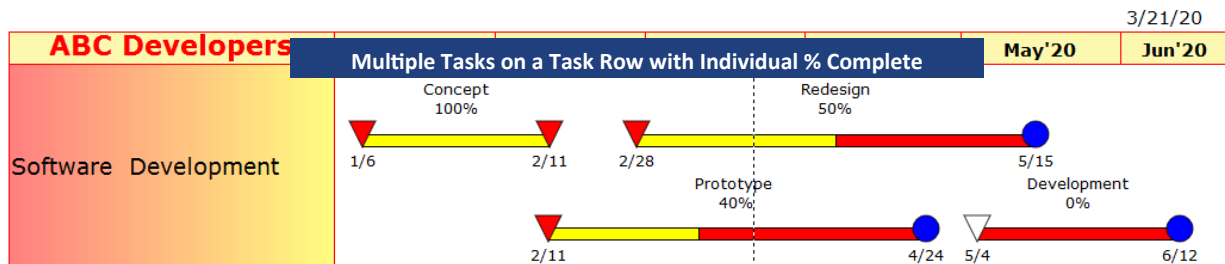
The **Prototype** percent complete pie symbol has changed to reflect 75% complete and the bar on the schedule is now shaded to 75%. Also, the status date has changed from 3/9 to 4/6.



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

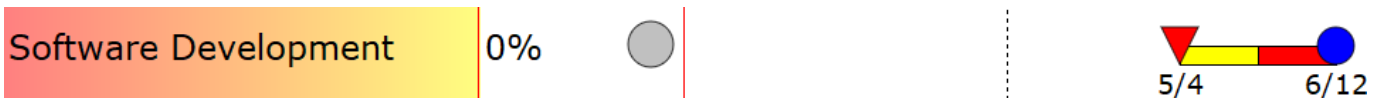
Bars and symbols can have percent complete assigned to them. This option is usually used when there are multiple tasks on a single task row as shown in the picture below.



For this tutorial we will continue using the current schedule and change the percent complete for the Software Development task.

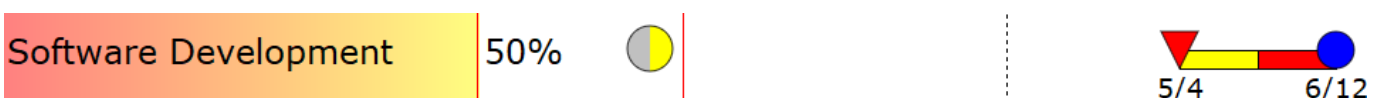
1. Click the (↶) **Arrow** tool in the toolbox.
2. On the **Software Development** task row click the **white triangle on 5/4**, it will highlight with a box around it. The toolbar at the top of the Milestones window is now active for that symbol as the **Selection** tab with **Current Object: Symbol**.
3. Choose the small **Size/Color** tab at the bottom of the toolbar.
4. In the **Override Symbol and Bar Colors** section 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%.
Note the percent complete column does not change. To have the percent complete column calculate when individual bar's % is set the option **Split Duration Across Bars** needs to be turned on.

If two bars originate from a symbol for the second bar's percent override select 2nd Bar Fill %.



Turn on Split Duration Across Bars option.

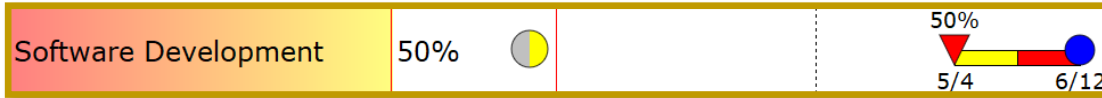
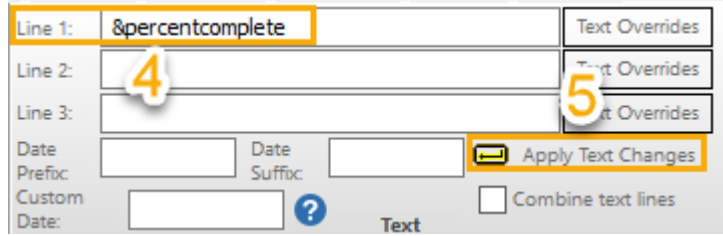
1. Right-click the **% Comp.** column's heading
2. Choose **Properties**.
3. In the **Column Properties** dialog, click the **Properties** button.
4. At the bottom of the **Percent Complete Settings** dialog box check on **Split Duration Across Bars**.



Add a % complete value to a task in the schedule area

1. Click the (↶) **Arrow** tool in the toolbox.
2. On the **Software Development** task row click the **red triangle on 5/4**, it will highlight with a box around it. The toolbar at the top of the Milestones window is now active for that symbol as the **Selection** tab with **Current Object: Symbol**.
3. Choose the small **Text** tab at the bottom of the toolbar.

4. In the **Text** section next to **Line 1:** enter **&percentcomplete**
5. Press the **Apply Text Changes** button. 50% will now display above the triangle.



For multiple tasks on a single task row follow the above direction, however type **&barfill1percent %**. If two bars originate from a symbol for the second bar's percent type **&barfill2percent %**.

