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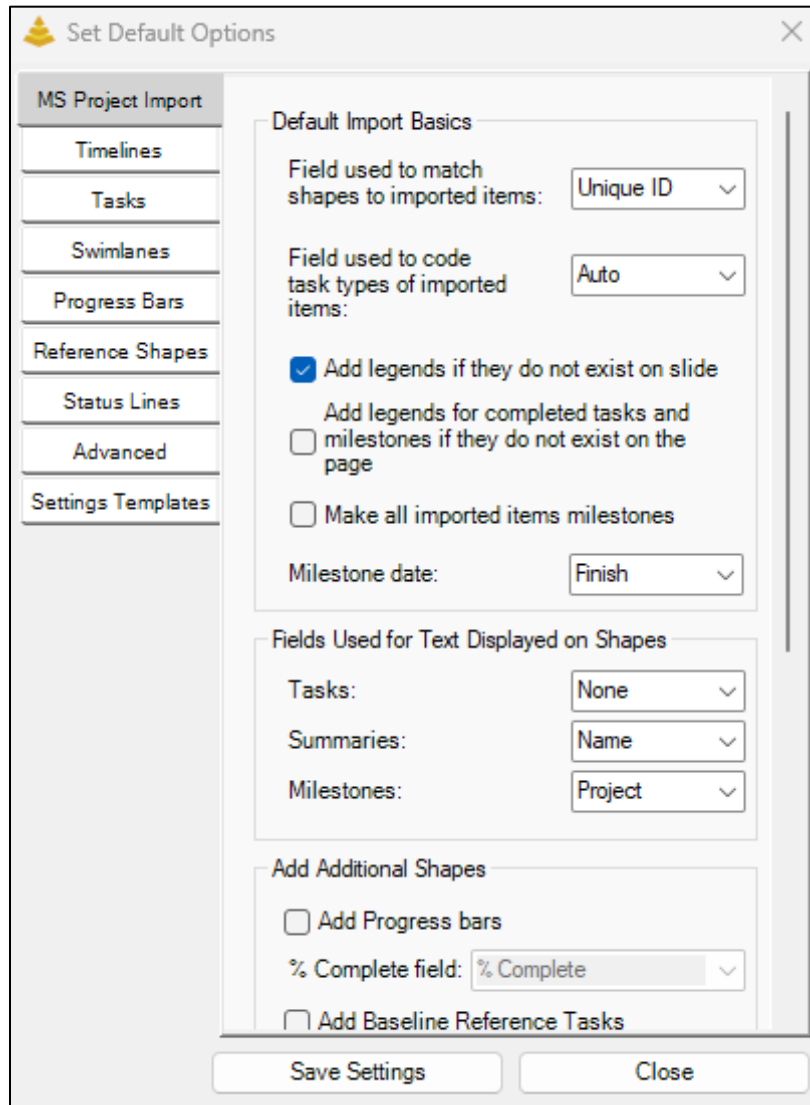
Presentation Pro – Adjusting Default Settings

Overview

SSI Presentation Professional is an add-in for **Microsoft PowerPoint** that is designed to create high level project schedule charts or roadmaps that can be presented to an audience. SSI Presentation Professional creates presentations by generating PowerPoint objects (shapes) that can be linked to Microsoft Project schedule items (Summaries, Tasks, and Milestones).

This document will cover the ways you can set up the Default settings for your Presentation Professional chart, including:

- Adjusting Legend Default Styles
- Adjusting all other Presentation Pro default options
- Saving, distributing, and Importing Settings Templates



Set Default Options

MS Project Import

- Timelines
- Tasks
- Swimlanes
- Progress Bars
- Reference Shapes
- Status Lines
- Advanced
- Settings Templates

Default Import Basics

Field used to match shapes to imported items: Unique ID

Field used to code task types of imported items: Auto

☒ Add legends if they do not exist on slide

☐ Add legends for completed tasks and milestones if they do not exist on the page

☐ Make all imported items milestones

Milestone date: Finish

Fields Used for Text Displayed on Shapes

Tasks: None

Summaries: Name

Milestones: Project

Add Additional Shapes

☐ Add Progress bars

% Complete field: % Complete

☐ Add Baseline Reference Tasks

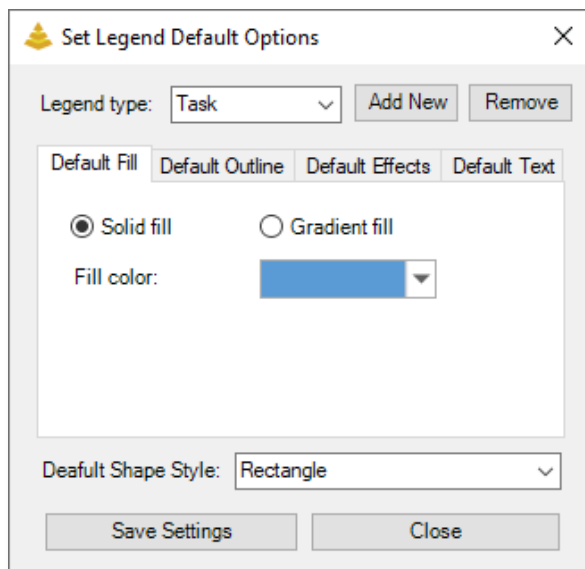
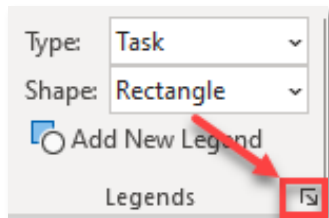
Save Settings Close

Adjusting Legend Default Options

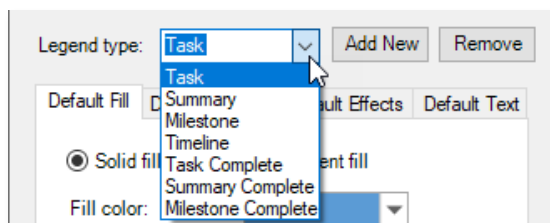
Legends are specially coded Presentation Pro shapes that allow you to easily control or modify the style of content on a slide. Each legend comes with a default style that determines its appearance when added to a slide and influences the style of new content if no legend is already present. You can customize the default style of a legend to suit your preferences.

Using the Legend Default Options Form

To edit the default styles of a legend, open the *Legend Default Options form* by clicking the button in the bottom right corner of the *Legends Group* in the *SSI Presentation Pro Ribbon*.

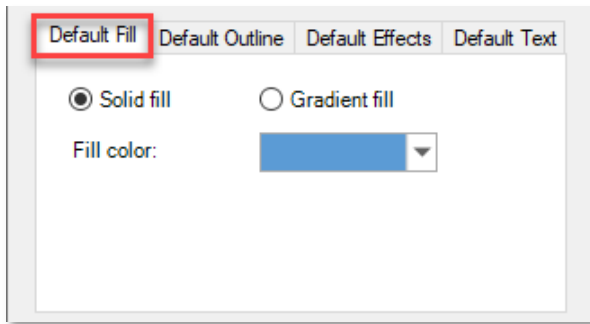


Click the *Legend Type* drop-down menu to control which legend's style is being updated.



The *Legend Default Options form* can control the following:

Default Fill Tab



The *Default Fill tab* in the 'Set Legend Default Options' dialog box allows you to customize the fill style of a legend shape. Below are the detailed explanations of each control available in this tab:

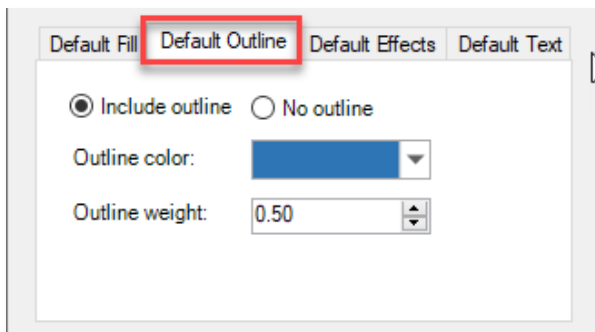
1. Solid Fill / Gradient Fill Radio Buttons

- **Solid Fill:** Select this option to apply a single, solid color to the fill of the legend shape.
- **Gradient Fill:** Select this option to apply a gradient effect to the fill of the legend shape, where the color transitions gradually from one shade to another.

2. Fill Color Dropdown

- Use this dropdown to choose the color that will fill the legend shape. Clicking the dropdown will open a color picker, allowing you to select your desired color.

Default Outline Tab



The *Default Outline tab* allows you to customize the outline style of a legend shape. Below are the detailed explanations of each control available in this tab:

1. Include Outline / No Outline Radio Buttons

- **Include Outline:** Select this option to add an outline to the legend shape.
- **No Outline:** Select this option to remove the outline from the legend shape.

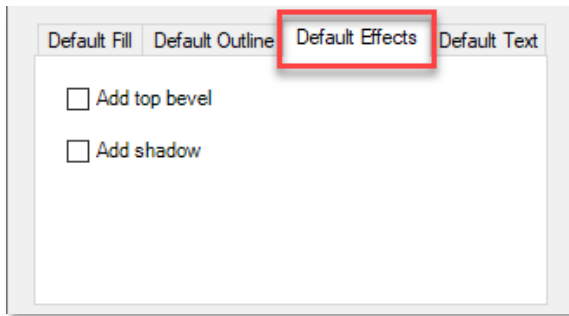
2. Outline Color Dropdown

- When 'Include Outline' is selected, use this dropdown to choose the color of the outline. Clicking the dropdown will open a color picker, allowing you to select your desired outline color.

3. Outline Weight Dropdown

- This control allows you to specify the thickness of the outline. Use the dropdown to select the desired weight (thickness) for the outline.

Default Effects Tab



The **Default Effects tab** allows you to customize additional visual effects for a legend shape. Below are the detailed explanations of each control available in this tab:

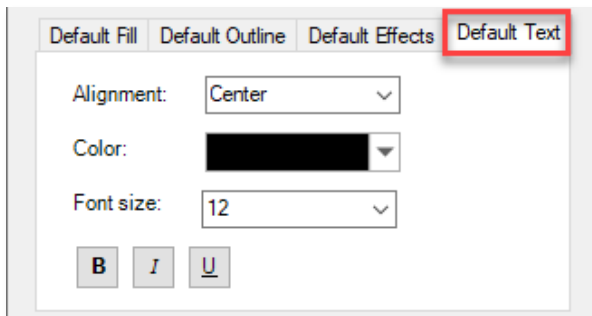
1. Add Top Bevel Checkbox

- **Add Top Bevel:** Check this box to apply a 3D bevel effect to the top edge of the legend shape, adding depth and dimension.

2. Add Shadow Checkbox

- **Add Shadow:** Check this box to apply a shadow effect to the legend shape, giving it a sense of depth and making it stand out on the slide.

Default Text Tab



The **Default Text tab** allows you to customize the text style for a legend shape. Below are the detailed explanations of each control available in this tab:

1. Alignment Dropdown

- **Alignment:** This dropdown allows you to set the alignment of the text within the legend shape. Options include Left, Right, Center, Top, and Bottom

2. Color Dropdown

- **Color:** Use this dropdown to choose the color of the text. Clicking the dropdown will open a color picker, allowing you to select your desired text color.

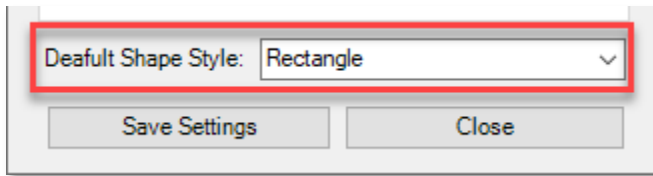
3. Font Size Dropdown

- **Font Size:** This control allows you to specify the size of the text within the legend shape. Use the dropdown to select the desired font size.

4. Text Style Buttons

- **Bold (B):** Click this button to make the text bold.
- **Italic (I):** Click this button to italicize the text.
- **Underline (U):** Click this button to underline the text.

Default Shape Style



The **Default Shape Style** dropdown allows you to select the default shape style for the legend. Options include various geometric shapes. The options can change depending on what type of legend is being edited.

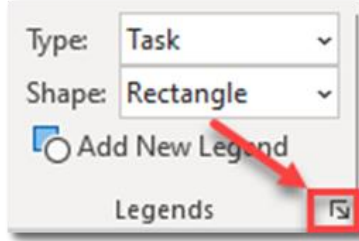
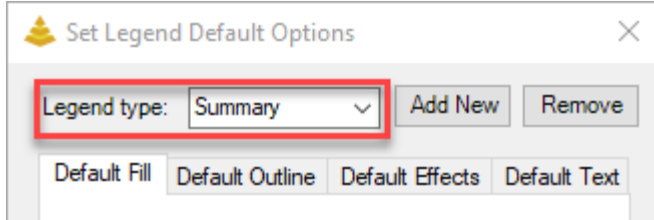
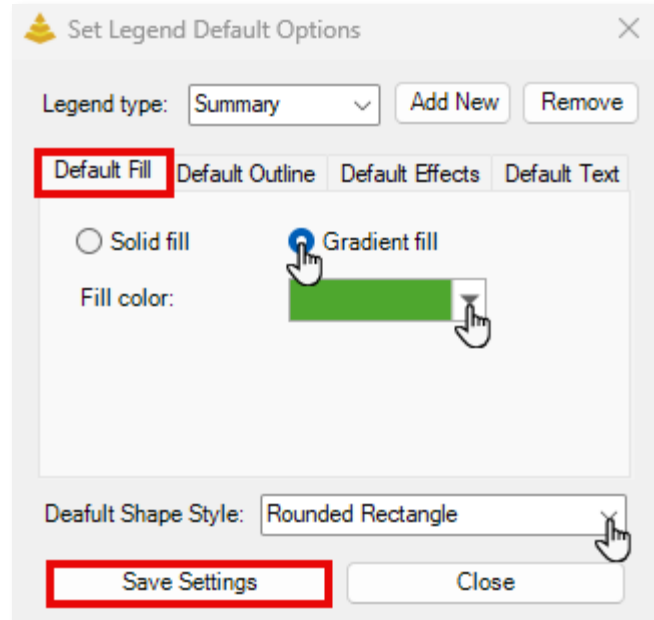
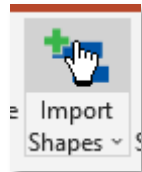
The options for non-milestone legends are the following:

- Rectangle: 
- Rounded Rectangle: 
- Circles W/Bar: 
- Diamonds W/Bar: 
- Up Triangles W/Bar: 
- Down Triangles W/Bar: 
- Up Arrows W/Bar: 
- Down Arrows W/Bar: 
- Stars W/Bar: 

The options for Milestone legends are:

- Diamond: 
- Star: 
- Up Triangle: 
- Down Triangle: 
- Circle/Oval: 
- Up Arrow: 
- Down Arrow: 

Class Exercise – Adjusting Basic Legend Default Options

Start of Practice Exercise	
1. In PowerPoint, open the Legend Default Options form by clicking the button in the lower-right corner of the Legends Group in the SSI Presentation Pro Ribbon .	
2. Change the Legend Type drop-down selection to Summary .	
3. On the Default Fill tab, select the Gradient Fill option and change the Fill color to Green. At the bottom of the form change the Default Shape Style to Rounded Rectangle. Click Save Settings and then close the window.	
4. Navigate back to PowerPoint and open a blank slide. Then click the top half of the Import Shapes button in the SSI Presentation Pro Ribbon .	

The Gantt chart displays the following tasks and their durations in 2025:

- Design Milestones:** A green bar spanning from approximately January 15 to June 15.
- Design Milestones (Milestones):**
 - Solution Engineering Review (SER)*: Diamond marker at approximately February 15.
 - System Definition Review (SDR)*: Diamond marker at approximately April 15.
 - Preliminary Design Review (PDR)*: Diamond marker at approximately May 15.
 - Critical Design Review (CDR)*: Diamond marker at approximately June 15.
- Test & Verification Milestones:** A green bar spanning from approximately June 15 to November 15.
- Test & Verification Milestones (Milestones):**
 - Test Readiness Review (TRR)*: Diamond marker at approximately July 15.
 - Production Readiness Review (PRR)*: Diamond marker at approximately August 15.
 - Operational Readiness Review (ORR)*: Diamond marker at approximately October 15.
 - Receive Authority to Operate (ATO)*: Diamond marker at approximately November 15.
- System Concept Development:** A green bar spanning from approximately January 1 to February 15.
- Requirements Analysis:** A green bar spanning from approximately February 1 to April 15.
- High Level Design (HLD):** A green bar spanning from approximately February 15 to June 15.
- Detailed Design (DD):** A green bar spanning from approximately May 15 to June 15.
- Development/Integration & Test:** A green bar spanning from approximately March 15 to August 15.
- Implementation:** A green bar spanning from approximately July 15 to November 15.
- Implement of Target Product Solution:** A green bar spanning from approximately August 15 to October 15.
- Conduct Pilot:** A blue bar spanning from approximately October 15 to November 15.
- Complete Preparation of Operational Sites:** A blue bar spanning from approximately October 15 to November 15.
- Deploy Solution to Production Environment:** A blue bar spanning from approximately November 1 to November 15.
- Conduct Operational Readiness Review (ORR):** A green bar spanning from approximately August 15 to November 15.
- Generate Presentation Materials for ORR:** A blue bar spanning from approximately October 15 to November 15.
- Ensure ORR Exit Criteria Has Been Met:** A blue bar spanning from approximately November 1 to November 15.
- Conduct Operational Readiness Review (ORR):** A blue bar spanning from approximately November 1 to November 15.
- Close ORR Action Items:** A blue bar spanning from approximately November 1 to November 15.
- Obtain ATO Approval Letter:** A diamond marker at approximately November 15.

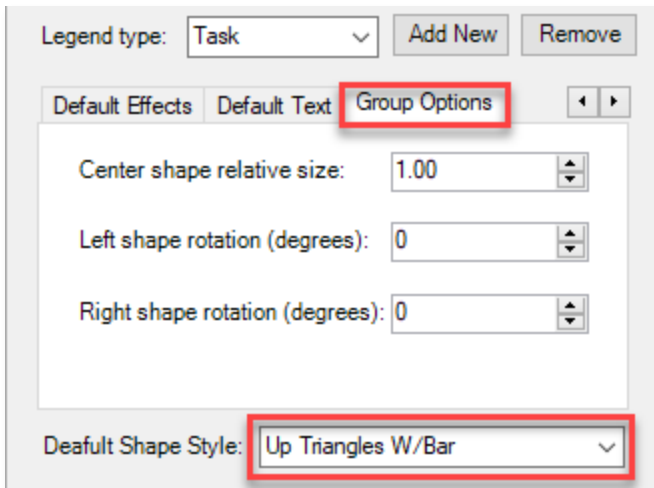
End of Practice Exercise

Additional Options for Grouped Shape Styles

Grouped Shape Styles are styles that combine multiple shapes into a single entity. Additional options become available on the **Legend Default Options form** if a legend's default shape style is set to any of these options:

- Circles W/Bar: 
- Diamonds W/Bar: 
- Up Triangles W/Bar: 
- Down Triangles W/Bar: 
- Up Arrows W/Bar: 
- Down Arrows W/Bar: 
- Stars W/Bar: 

Group Options Tab



Legend type: Task Add New Remove

Default Effects Default Text **Group Options**

Center shape relative size: 1.00

Left shape rotation (degrees): 0

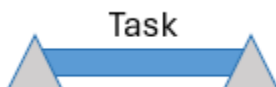
Right shape rotation (degrees): 0

Default Shape Style: Up Triangles W/Bar

The 'Group Options' tab provides additional customization options for grouped shape styles. These controls are only available if the default shape style is set to one of the grouped styles. Below are the detailed explanations of each control available in this tab:

1. Center Shape Relative Size

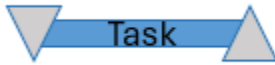
- **Center Shape Relative Size:** This control allows you to adjust the height of the center shape in a grouped shape relative to its outer shapes. Enter a value to increase or decrease the height of the center shape. A value of 1.00 maintains the default height, values greater than 1.00 increase the height, and values less than 1.00 decrease the height. Here's an example of a legend where the center shape is 50% the relative size as the outer shapes:



2. Left Shape Rotation (Degrees)

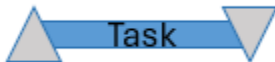
- **Left Shape Rotation (Degrees):** This control allows you to rotate the left shape around its center point by a specified number of degrees. Enter a value to set the rotation angle. Only

positive values are allowed, which rotate the shape clockwise. Here's an example of a legend where the left shape is rotated 180 degrees:

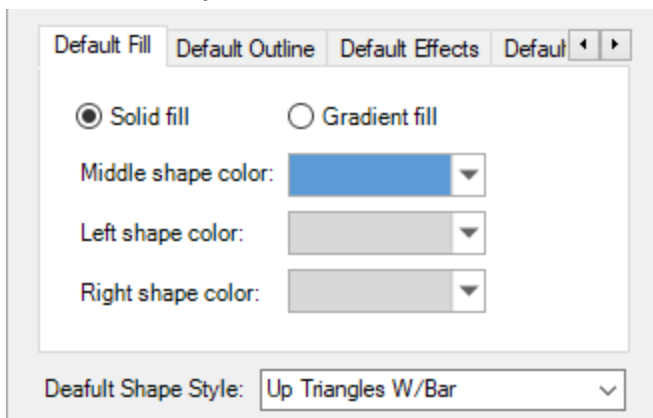


3. Right Shape Rotation (Degrees)

- **Right Shape Rotation (Degrees):** This control allows you to rotate the right shape around its center point by a specified number of degrees. Enter a value to set the rotation angle. Only positive values are allowed, which rotate the shape clockwise. Here's an example of a legend where the right shape is rotated 180 degrees:



Additional Fill Options

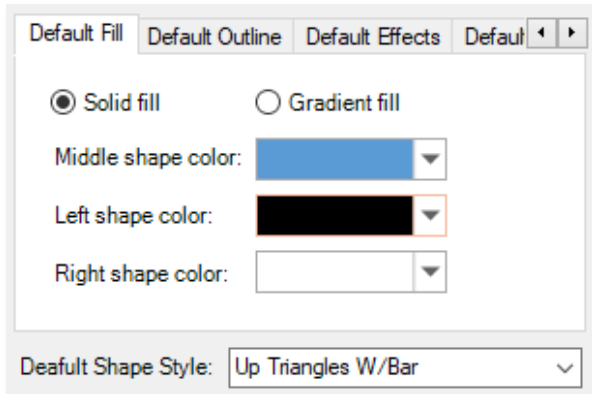


When the default shape style is set to a grouped shape style, the **Default Fill tab** changes to include additional fill options for the left and right shapes. These new controls allow for more detailed customization of the grouped shapes.

Updated Controls in the Default Fill Tab:

1. **Middle Shape Color Dropdown**
 - **Middle Shape Color:** This dropdown allows you to choose the fill color for the middle shape in the grouped style. Clicking the dropdown will open a color picker to select your desired color.
2. **Left Shape Color Dropdown**
 - **Left Shape Color:** This dropdown allows you to choose the fill color for the left shape in the grouped style. Clicking the dropdown will open a color picker to select your desired color.
3. **Right Shape Color Dropdown**
 - **Right Shape Color:** This dropdown allows you to choose the fill color for the right shape in the grouped style. Clicking the dropdown will open a color picker to select your desired color.

Here's an example of what a legend with these options would look like:



Default Fill | Default Outline | Default Effects | Default ▾ ▸

☒ Solid fill ☐ Gradient fill

Middle shape color: ▾

Left shape color: ▾

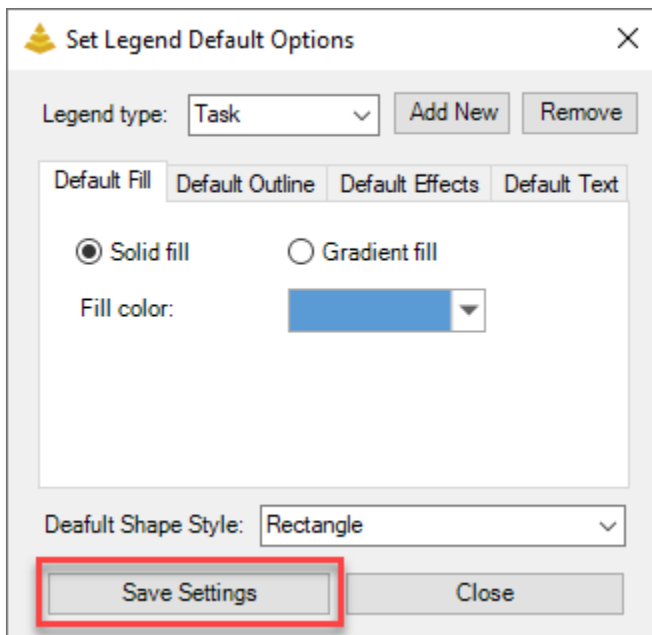
Right shape color: ▾

Default Shape Style: Up Triangles W/Bar ▾



Saving Default Styles

To save the styles for your legends, click the **Save Settings** button.



Set Legend Default Options ×

Legend type: Task ▾ Add New Remove

Default Fill | Default Outline | Default Effects | Default Text

☒ Solid fill ☐ Gradient fill

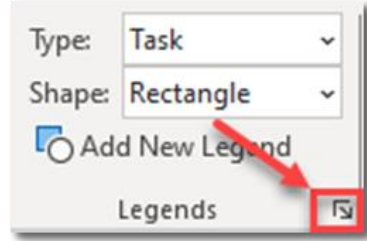
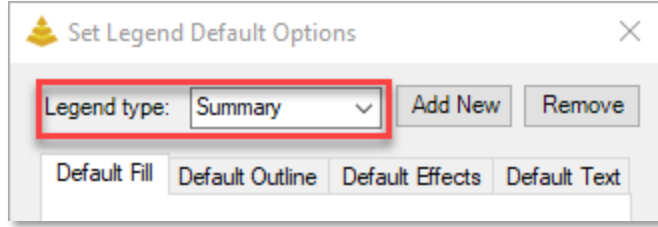
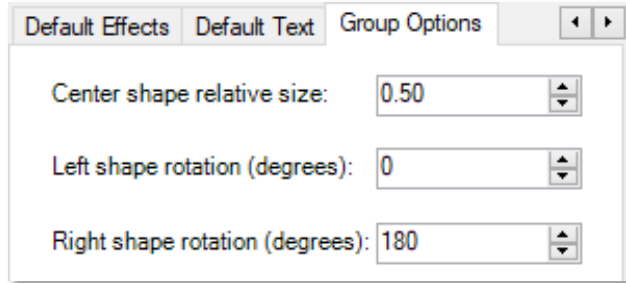
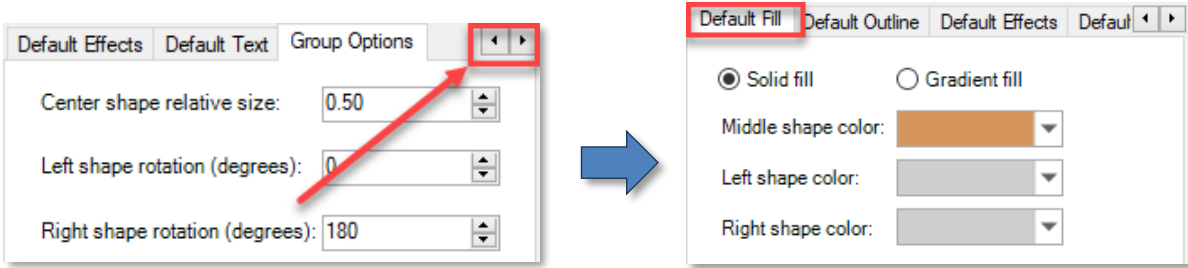
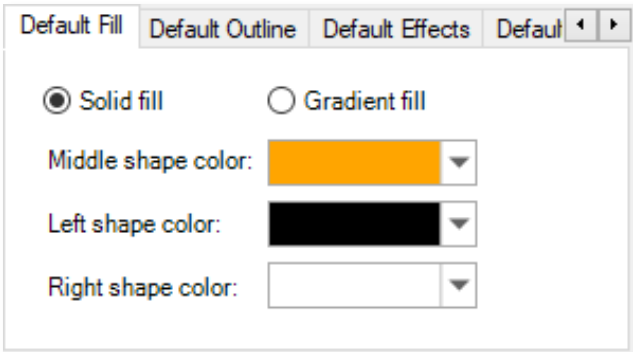
Fill color: ▾

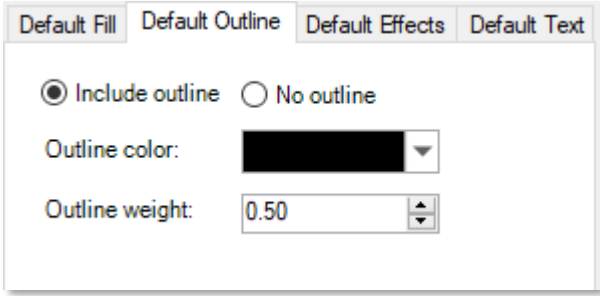
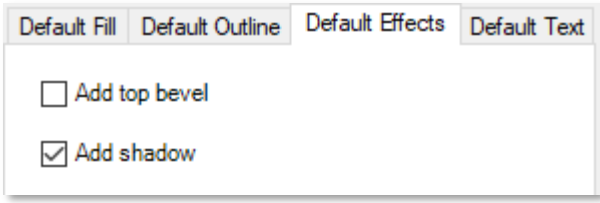
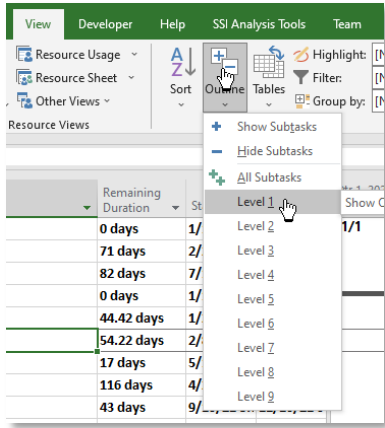
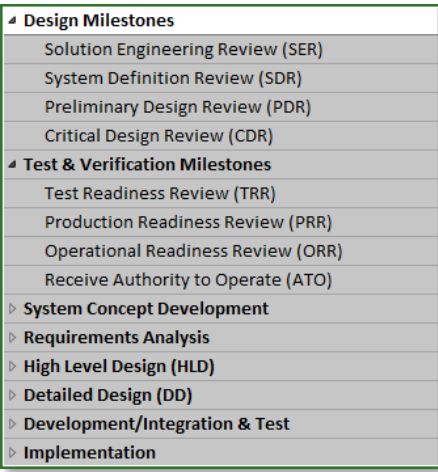
Default Shape Style: Rectangle ▾

Save Settings Close

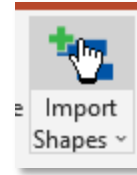
This action saves the styles for all legends in the list. Therefore, if you modify one legend, you don't need to save before changing the legend type in the dropdown menu. You can save after making changes to any number of legends.

Class Exercise –Using Grouped Shape Type Options

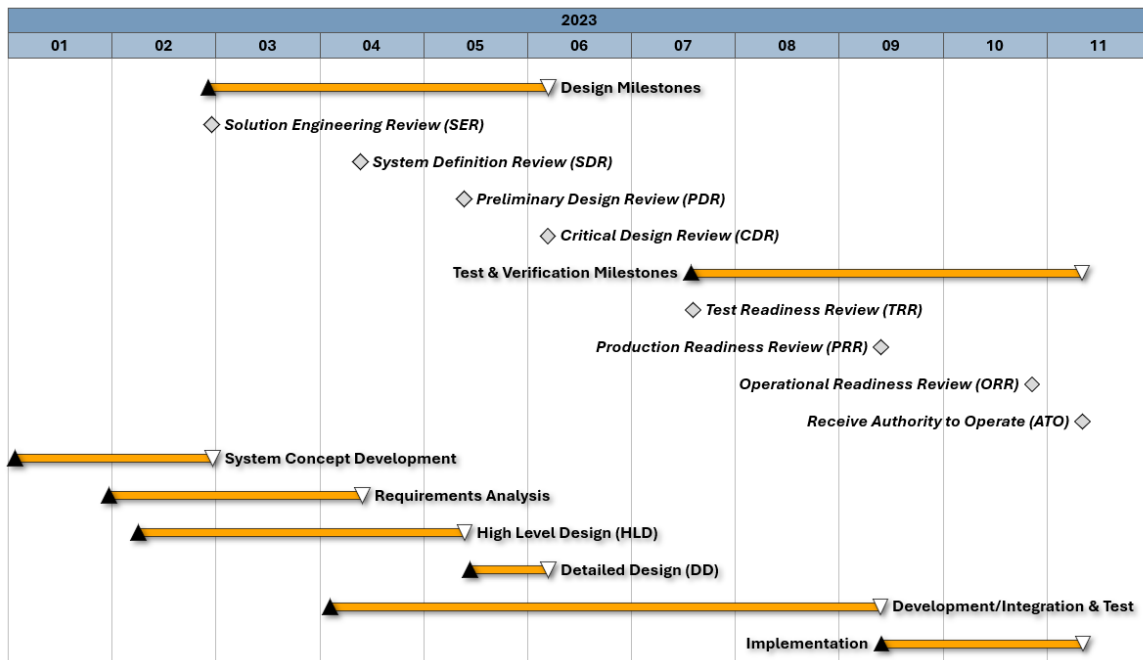
Start of Practice Exercise	
6. In PowerPoint, open the Legend Default Options form by clicking the button in the lower-right corner of the Legends Group in the SSi Presentation Pro Ribbon .	
7. Change the Legend Type drop-down selection to Summary .	
8. Change the Default Shape Style to Up Triangles W/Bar .	
9. Change the Group Options to match the image on the right →	
10. Use the left arrow button to navigate back to the Default Fill tab.	
11. Change the options on the Default Fill tab to match the image to the right →	

12. Change the options on the Default Outline tab to match the image on the right →	
13. Change the options on the Default Effects tab to match the image on the right →	
14. Save the default legend styles by clicking the Save Settings button on the bottom left of the Legend Default Options form.	
15. Open the SSi Example Project file and set the outline level to Level 1	
16. Expand rows 3 and 8, then select all the tasks from row 3 down.	

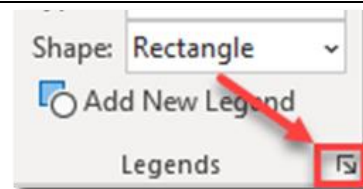
17. Navigate back to PowerPoint and open a blank slide. Then click the top half of the **Import Shapes** button in the **SSI Presentation Pro Ribbon**.



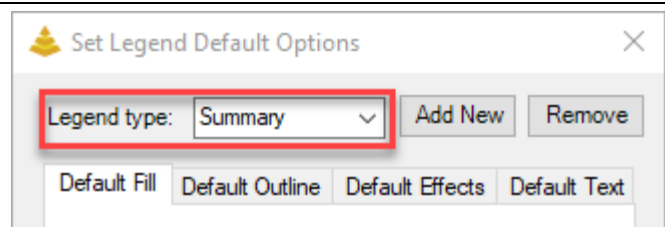
18. Observe the style of summaries on the slide follow the default style:



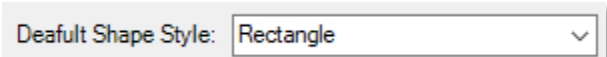
19. Reopen the **Legend Default Options** form by clicking the button in the lower-right corner of the **Legends Group** in the **SSI Presentation Pro Ribbon**.



20. Change the **Legend Type** drop-down selection to **Summary**.



21. Change the **Default Shape Style** back to **Rectangle**



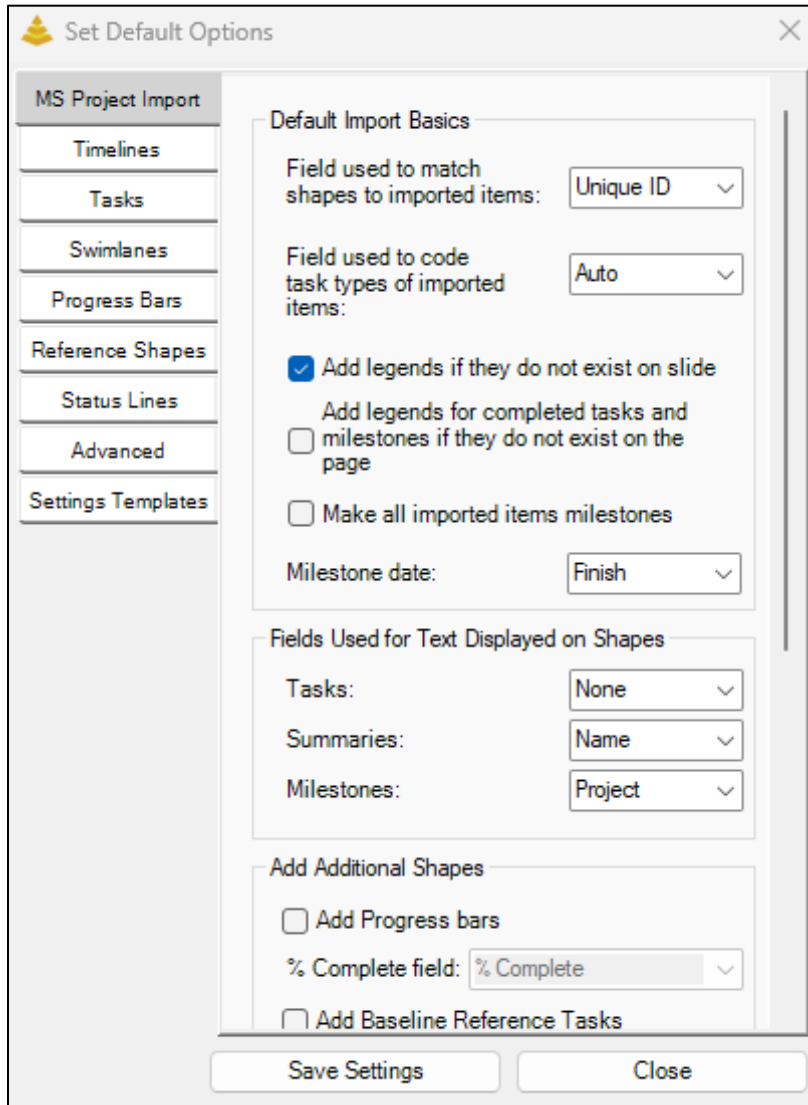
22. Save the default legend styles by clicking the **Save Settings** button



End of Practice Exercise

Set Default Options Form

The **Set Default Options** form allows you to select all the other default options for Presentation Professional.

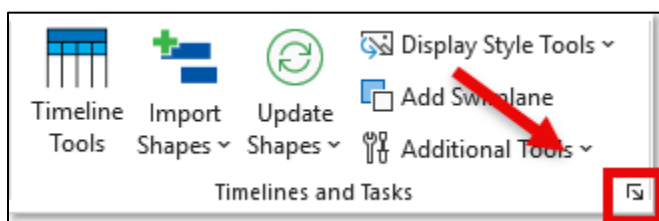


The **Set Default Options** dialog box is shown. It has a sidebar on the left with the following options: **MS Project Import** (selected), Timelines, Tasks, Swimlanes, Progress Bars, Reference Shapes, Status Lines, Advanced, and Settings Templates. The main area is divided into three sections:

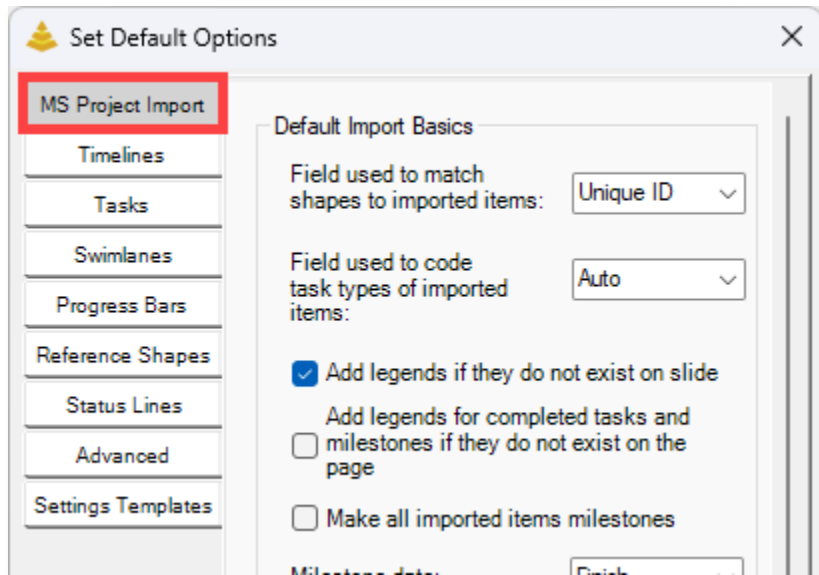
- Default Import Basics**
 - Field used to match shapes to imported items: **Unique ID** (dropdown)
 - Field used to code task types of imported items: **Auto** (dropdown)
 - ☒ Add legends if they do not exist on slide
 - ☐ Add legends for completed tasks and milestones if they do not exist on the page
 - ☐ Make all imported items milestones
 - Milestone date: **Finish** (dropdown)
- Fields Used for Text Displayed on Shapes**
 - Tasks: **None** (dropdown)
 - Summaries: **Name** (dropdown)
 - Milestones: **Project** (dropdown)
- Add Additional Shapes**
 - ☐ Add Progress bars
 - % Complete field: **% Complete** (dropdown)
 - ☐ Add Baseline Reference Tasks

At the bottom are **Save Settings** and **Close** buttons.

You can access this form by navigating to the **Timelines and Tasks** group in the Presentation Pro ribbon and clicking on the arrow in the bottom right-hand corner, as shown below:

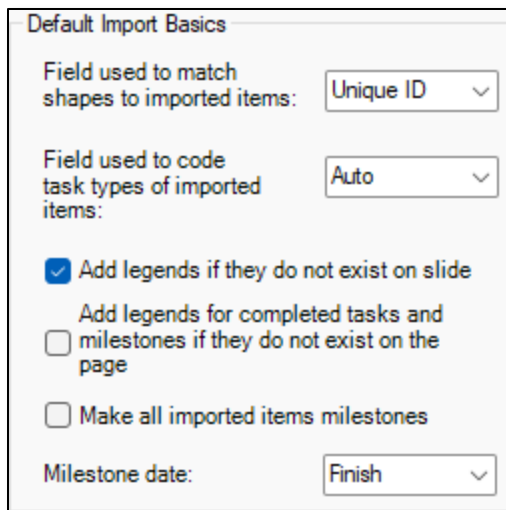


MS Project Import options



Default Import Basics

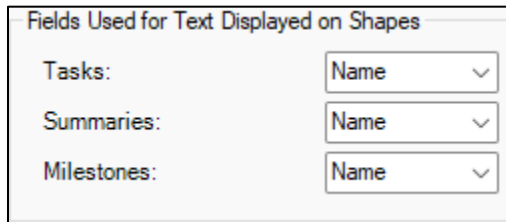
The Import Basics allows you to define your basic options when importing data from MS Project.



- The Default **Field used to match shapes to Imported Items** can be set to Unique ID or any of the available Text, Number, or Outline Code fields available in MS Project.
- **Field Used to code task types** can be set to Auto which will code tasks by their MS Project type (Summary, Task or Milestone) or the Contract, Project, or any of the available Text, Number, or Outline Code fields.
- You also have the ability to choose to **Add Legends** and **Add Legends of Completed Tasks and Milestones** if they don't already exist.
- You can choose to **Make all imported items milestones** and choose if you want the milestone to appear on the Start or Finish dates.

Fields Used for Text Displayed on Shapes

Next you have the ability to choose what Field from MS Project will be Displayed on Tasks, Summaries, and Milestones.

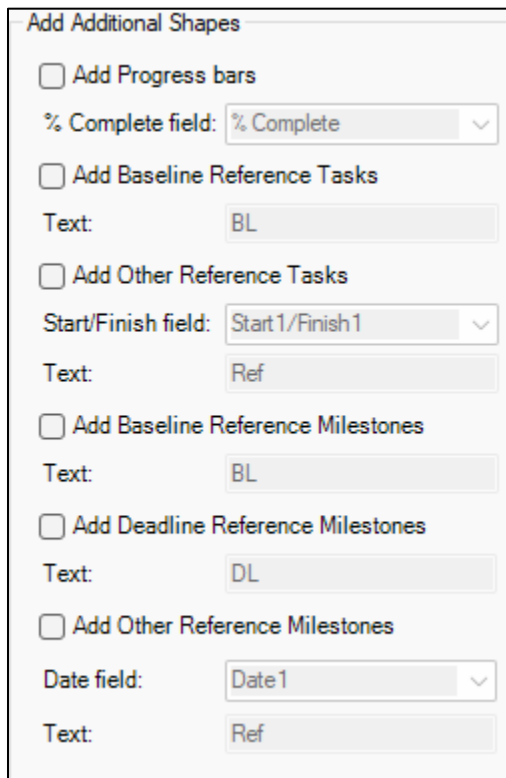


Fields Used for Text Displayed on Shapes	
Tasks:	Name
Summaries:	Name
Milestones:	Name

- **Name** will display the Task Name field
- **None** will not display any text on shapes
- **Contact** will display the Contract Field
- **Project** will display the Project Name
- **Duration** will display the Duration
- Any of the **Text** or **Outline Code** fields will display whatever text is entered in chosen field

Add Additional Shapes

This group of options allows you to select additional shapes that can be added with the standard shapes by default.

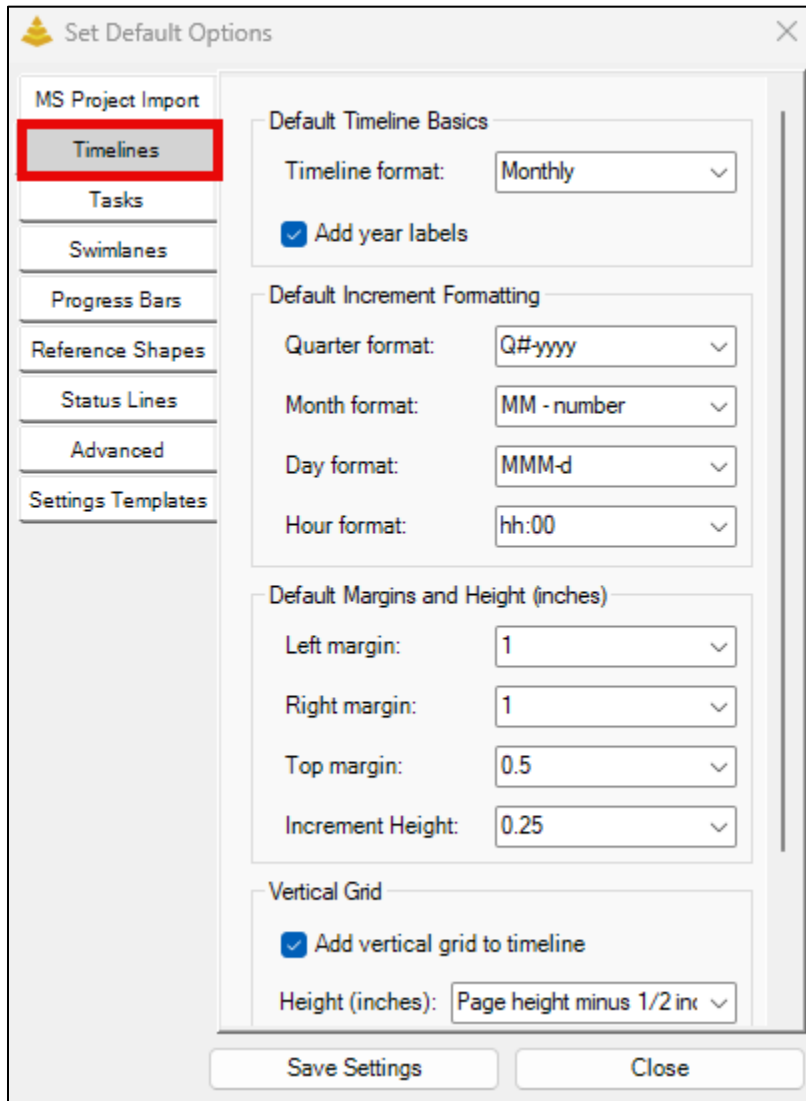


Add Additional Shapes	
☐ Add Progress bars	
% Complete field:	% Complete
☐ Add Baseline Reference Tasks	
Text:	BL
☐ Add Other Reference Tasks	
Start/Finish field:	Start1/Finish1
Text:	Ref
☐ Add Baseline Reference Milestones	
Text:	BL
☐ Add Deadline Reference Milestones	
Text:	DL
☐ Add Other Reference Milestones	
Date field:	Date1
Text:	Ref

- You can choose to **Add Progress Bars** by default and which field to get the % Complete value from.
- You can choose to **Add Baseline Reference Tasks** and **Baseline Reference Milestones** by default. If chosen you can also define the text you want displayed.
- You can choose to **Add Other Reference Tasks** and **Other Reference Milestones** by default. If chosen you can also choose the Start/Finish or Baseline Start/Finish fields you want to reference.
- You can choose to **Add Deadline Milestones** by default. If chosen you can also define the text you want displayed.

Timelines

The Timelines section gives you the ability to set all of the default options for your Presentation Professional chart's timeline.



Default Timeline Basics

- You can choose for the timeline format to be Yearly, Monthly, Quarterly, Quarterly & Monthly, Monthly & Daily, Daily, Daily & Hourly or Hourly.
- You can also check or uncheck the option to Add year Labels by default.

Default Increment Formatting

- You can choose how to specific increments will be formatted by default. This applies to all the options listed above and can be set to a variety of options including alphanumeric, numbers or letter only

Default Margin and Height

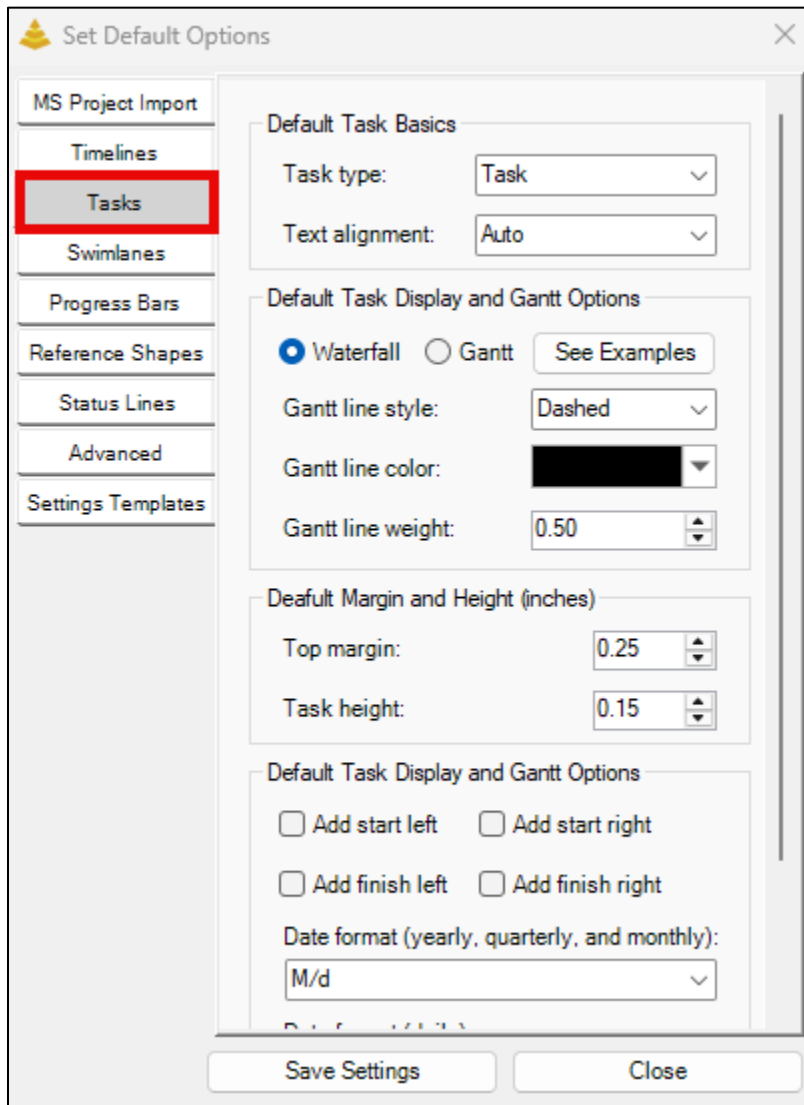
- You can set up the default margins for the timeline as well as the default increment height.

Vertical Grid

- You can select to include a vertical grid on your chart by default as well as the height of the vertical grid.
- You can choose the frequency that the vertical grid will be shown (Month, Quarter, Half-Year, Year)
- You can choose the default color of the vertical grid lines.

Tasks

The Tasks section allows you to set all of the default options for how tasks will be displayed on your Presentation Professional chart.



Set Default Options

MS Project Import

Timelines

Tasks

Swimlanes

Progress Bars

Reference Shapes

Status Lines

Advanced

Settings Templates

Default Task Basics

Task type: Task

Text alignment: Auto

Default Task Display and Gantt Options

☒ Waterfall ☐ Gantt [See Examples](#)

Gantt line style: Dashed

Gantt line color: [Black]

Gantt line weight: 0.50

Default Margin and Height (inches)

Top margin: 0.25

Task height: 0.15

Default Task Display and Gantt Options

☐ Add start left ☐ Add start right

☐ Add finish left ☐ Add finish right

Date format (yearly, quarterly, and monthly): M/d

Save Settings Close

Default Task Basics

- Sets the default task type and the default text position.

Default Task Display and Gantt Options

- You can choose to have your Presentation Pro charts displayed in either a Waterfall or Gantt Chart Style
 - For the Gantt Style you also have the ability to set the default Gantt line style, color and weight.

Default Margin and Height

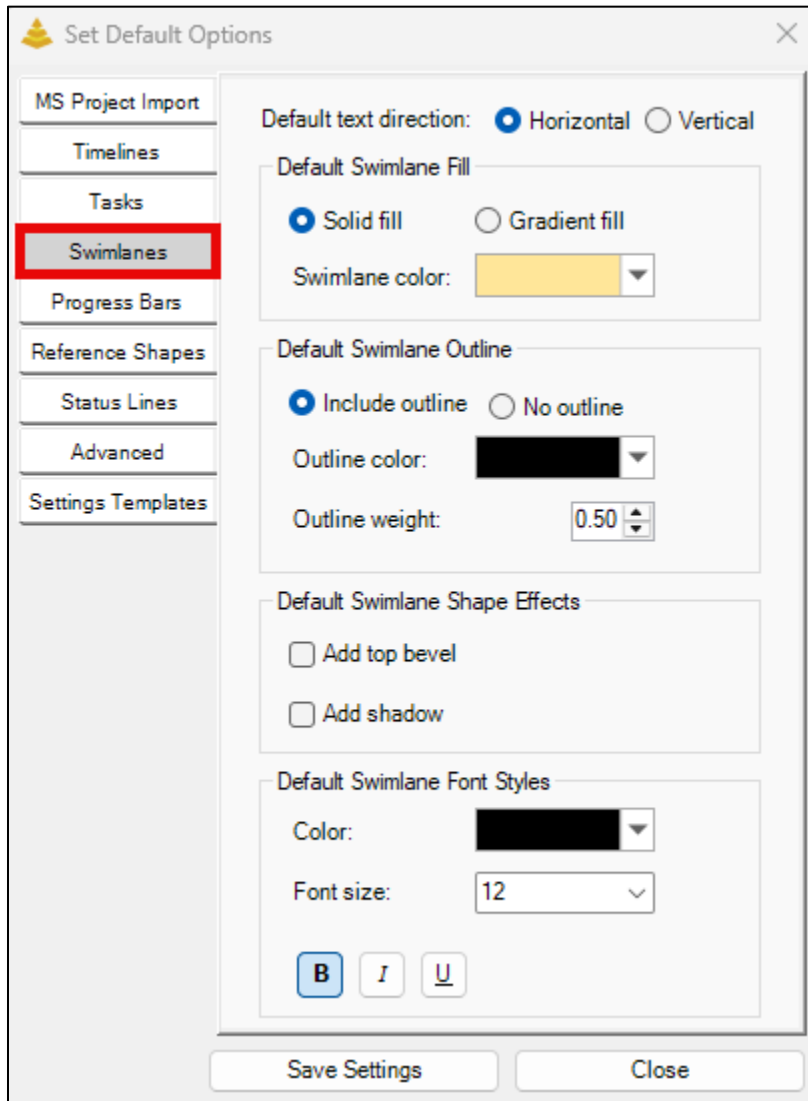
- You can set your default margin to the top of the chart and the default task height.

Default Task Display and Gantt Options

- You can choose to display dates as a default on shapes as well as the position relative to the other text.
- You can also choose the default format to display dates

Swimlanes

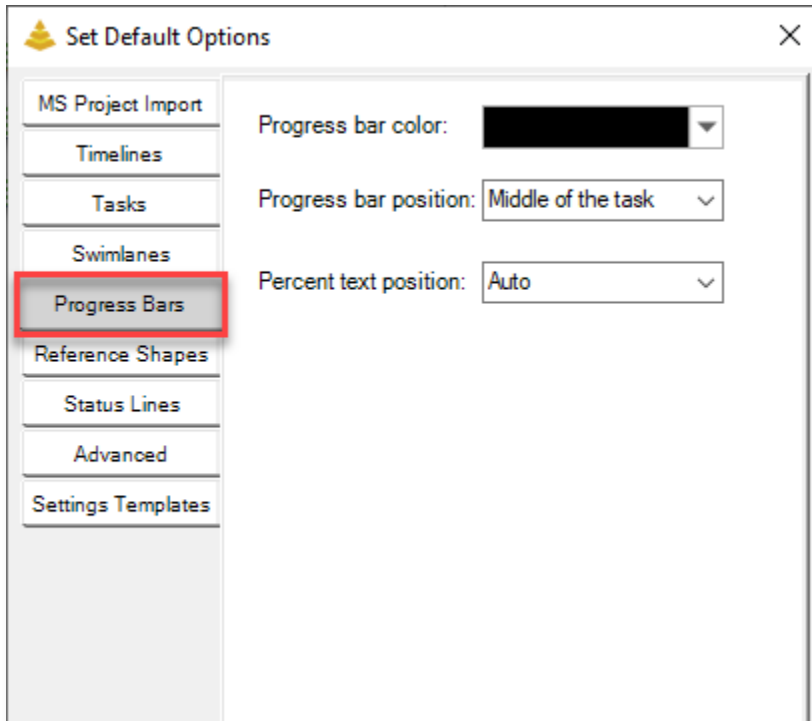
The Swimlanes section give you the ability to set all of the default options for swimlanes of you Presentation Pro charts.



- You can choose the default color for your Swimlanes as well as if you want them to be a solid or gradient fill.
- You can choose to include an outline or not to include an outline on your Swimlanes as the default.
- If you do want to include an outline, you can choose the default color and weight.
- You can choose to add a Top Bevel or a Shadow as a default effect on your Swimlanes.
- You can choose to the default way the text on your Swimlanes will be displayed including: Direction (Horizontal or Vertical), Color, Font Size and Text attributes (Bold, Italic or Underlined)

Progress Bars

The Progress Bars section gives you the ability to set up the default options for how Progress Bars will be displayed on your Presentation Pro charts.



- You can choose the Default color of the progress bars.
- You can choose the default position of where the progress bars will appear on the shape (Top, Middle or Same Height as the task).

Middle of the task: a bar in the middle of the activity:



Top of the task: a bar at the top of the activity:



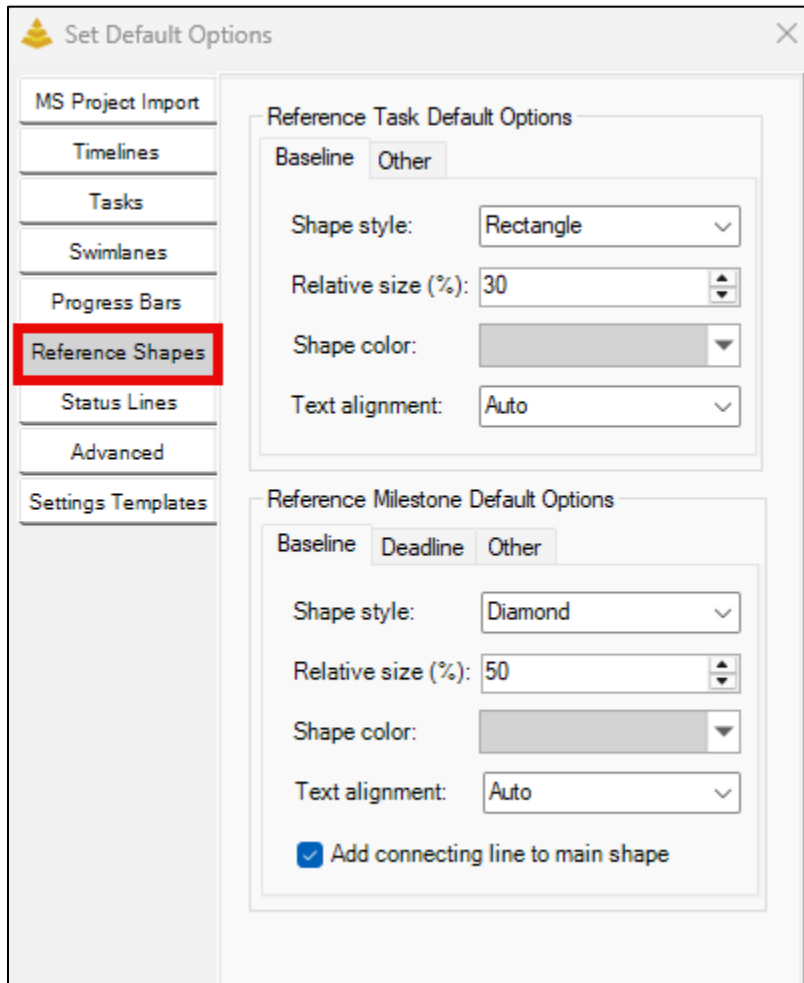
Same height as the task: a bar the same height as the activity:



- You can choose where to display the % Complete text.
 - If you choose None, no % Complete text will be displayed.

Reference Shapes

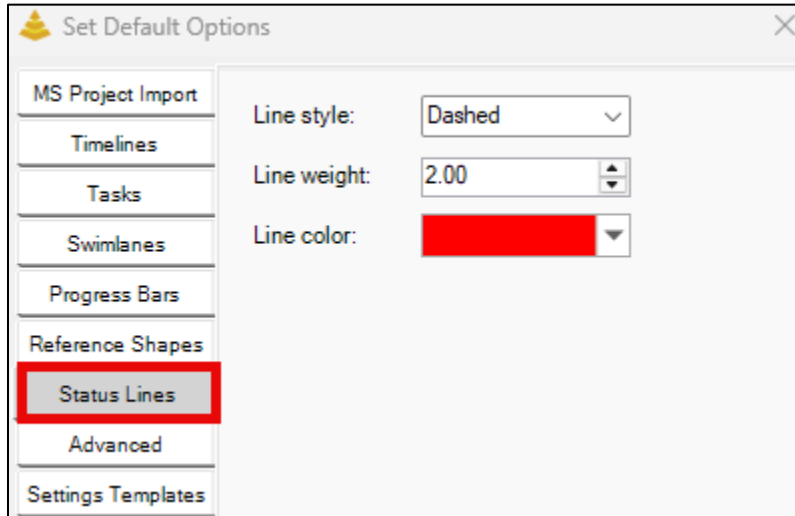
The Reference Shapes section gives you the ability to set up the default options for how reference shapes will be displayed on your Presentation Pro charts. These reference shapes can be shapes that correspond to the Baseline dates of tasks or milestones, Deadline dates (for Milestones only) OR any of the Start/Finish fields available in Microsoft Project.



- You can choose the default shape style of the reference shapes (Rectangle or Rounded Rectangle for Reference Tasks, Diamond, Star, Triangles, Arrows, or Circles for Reference Milestones)
- You can choose the default size of the reference shapes (relative to the size of the shape its referencing)
- You can choose the default color of the reference shapes
- You can choose how to position the text of the reference shapes
- For milestones, you can choose to show a connecting line from the reference milestone by default.

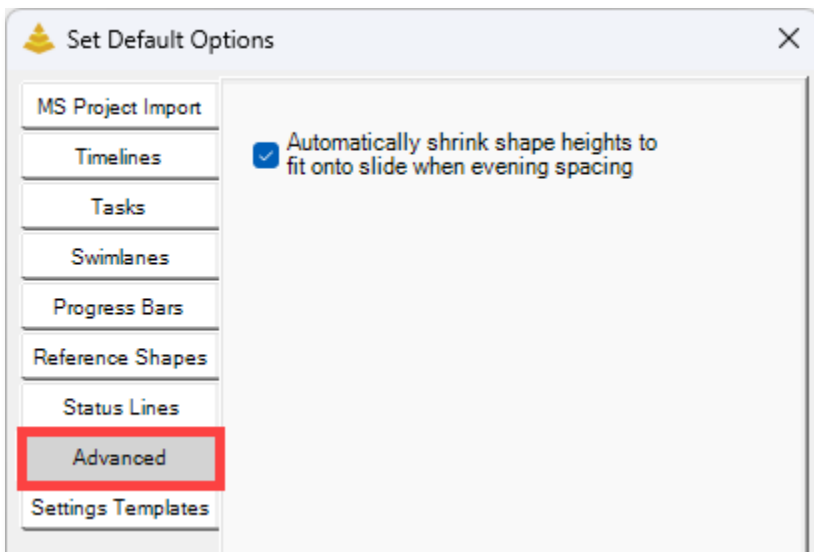
Status Lines

The status Lines section gives you the ability to set up the default options for how the status line will be displayed on your Presentation Pro charts.



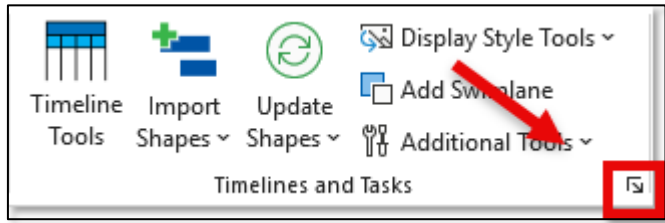
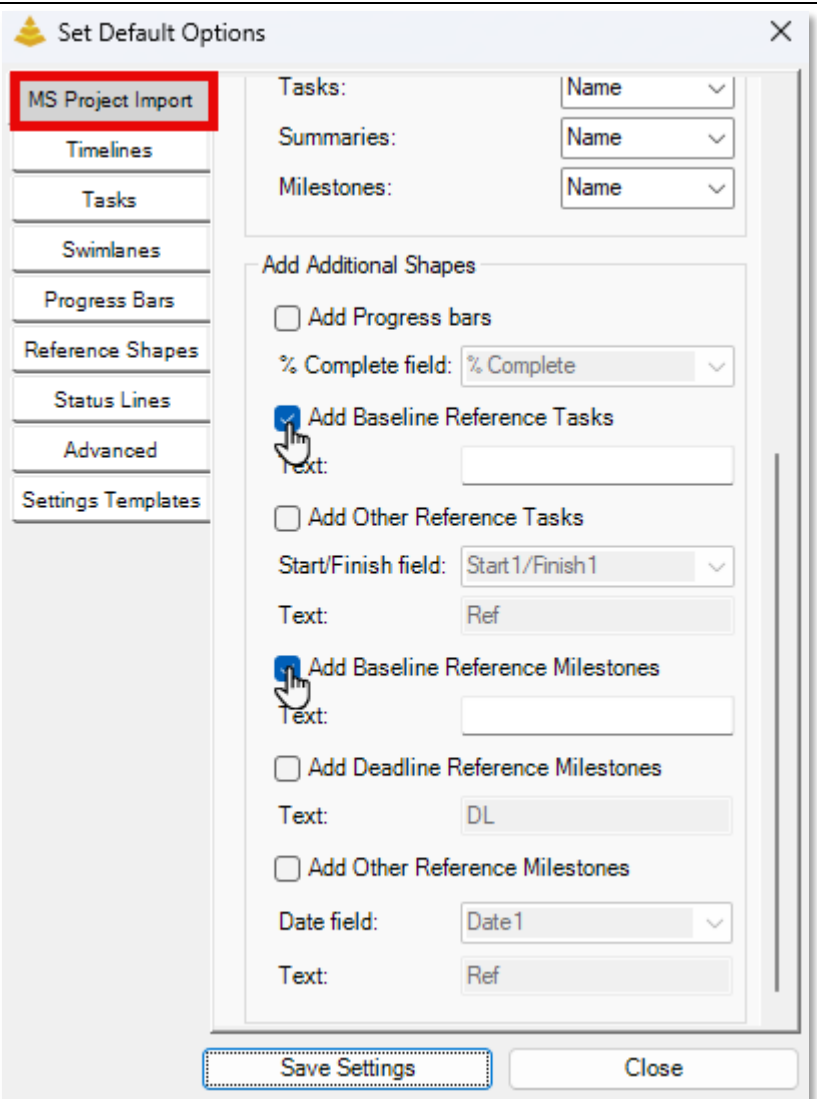
- You can choose the default line style (Dashed, Dotted or Solid).
- You can choose the default line weight.
- You can choose the default line color.

Advanced

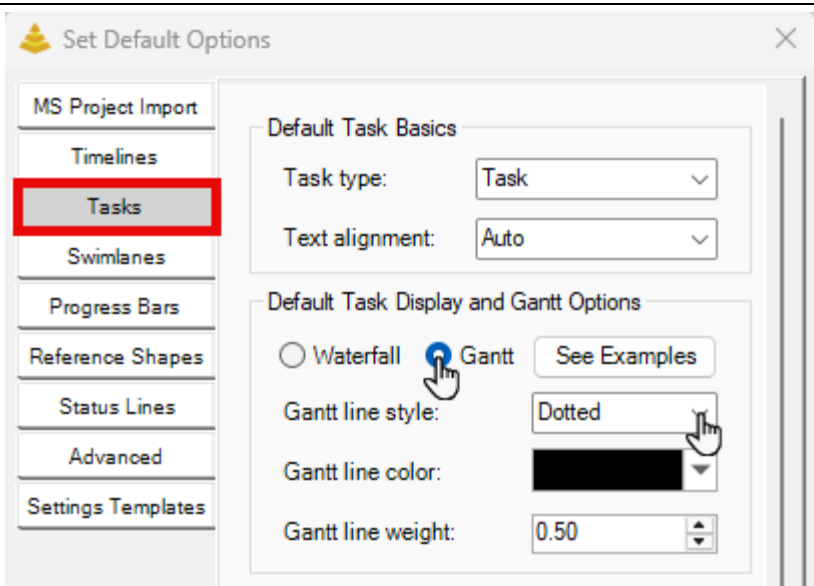


The Advanced Section gives you the ability to turn on or off the default setting to have Presentation Pro **Automatically Shrink Shape Heights** to fit everything onto a slide.

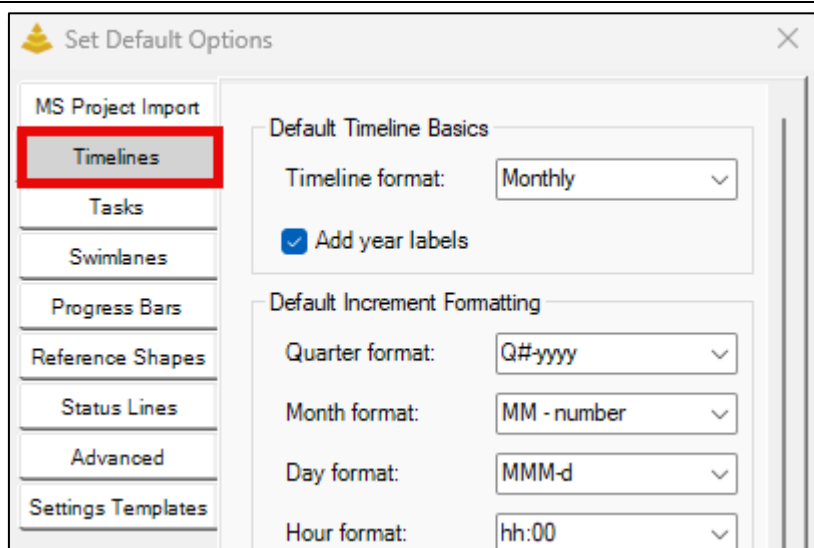
Class Exercise –Using the Presentation Pro Default Options Form

Start of Practice Exercise	
1. In PowerPoint, open the Presentation Pro Default Options form by clicking the button in the lower-right corner of the Timelines and Tasks Group in the SSi Presentation Pro Ribbon.	
2. In the MS Project Import tab, scroll to the bottom of the window and select the boxes to Add Baseline Reference Tasks and Add Baseline Reference Milestones. Clear the Text values.	

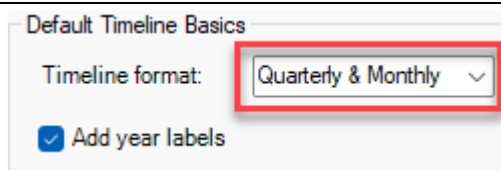
3. Select the **Tasks** tab in the Default Options Form. In the *Default Task Display and Gantt Options group* select the **Gantt** radio button and select **Dotted** from the Gantt line style dropdown menu.



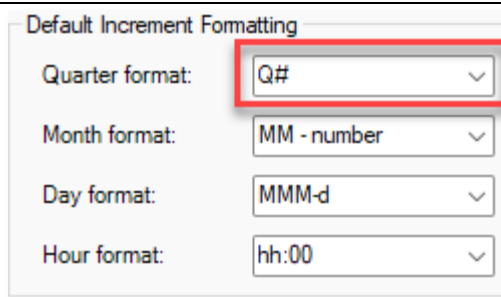
4. Navigate to the *Timelines* tab in the Default Options form.

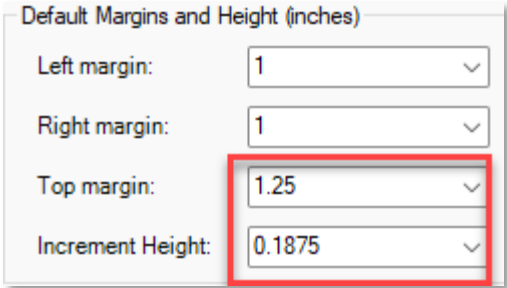
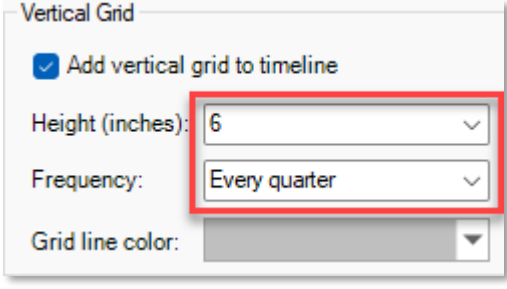
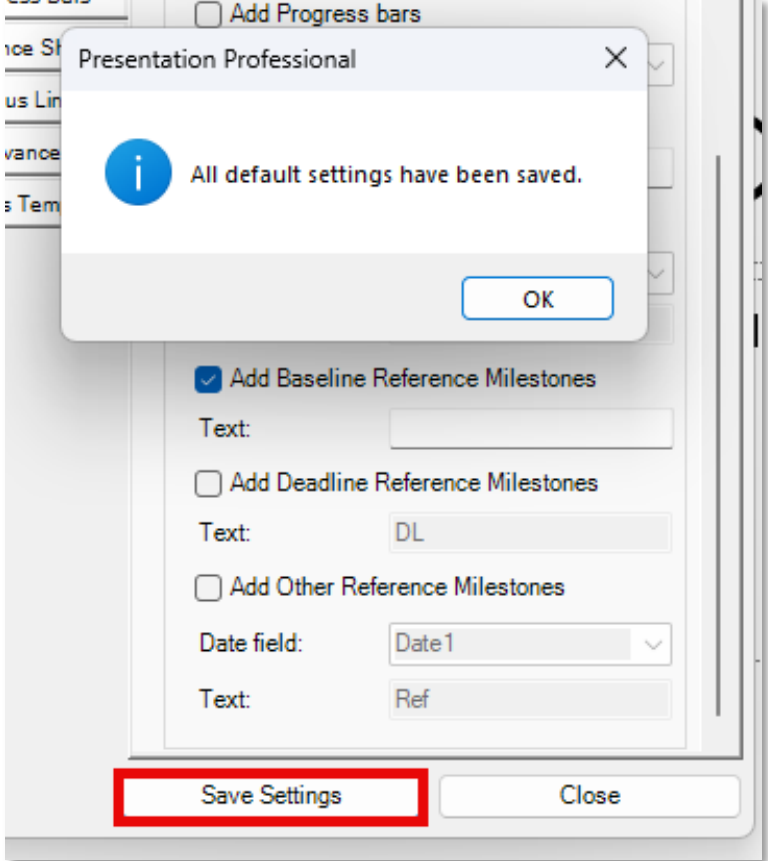


5. Set the *Timeline Format* to **Quarterly and Monthly**.

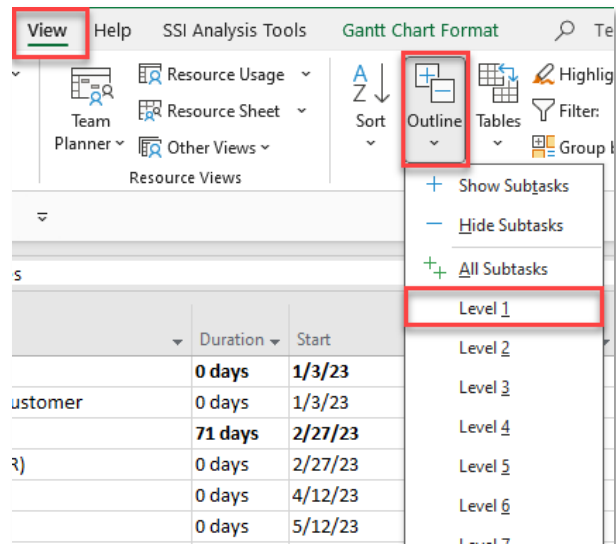


6. Set the *Quarter Format* to **Q#**.



7. Set the <i>Top Margin</i> to 1.25 and the Increment Height to 0.1875.	
8. Set the <i>Grid Height</i> to 6 and the Gridline Frequency to <i>Every Quarter</i>.	
9. Click the Save Settings button at the bottom of the window. Observe the message box telling you All Default setting Have Been Saved.	

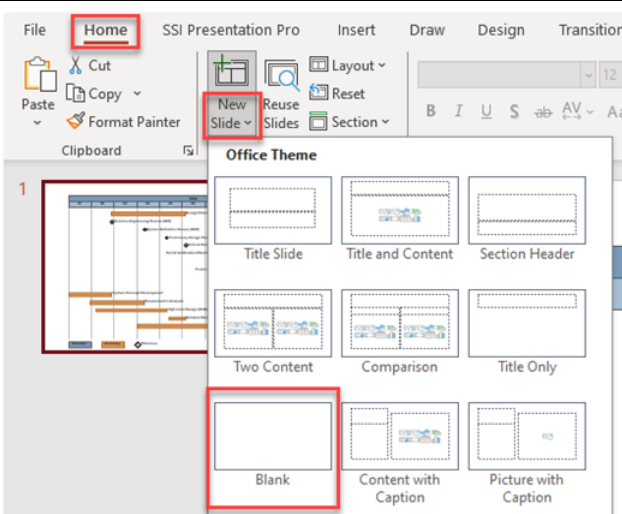
10. Open the [SSi Example Project file](#) in *Microsoft Project*. Set the outline to Level 1 by using the **Outline** menu on the **View Ribbon**.



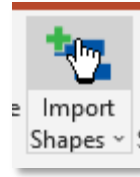
11. Click the small triangle button to the left of the name of the summaries on rows 3 and 8 to display their child tasks, then select all activities from row 3 down.



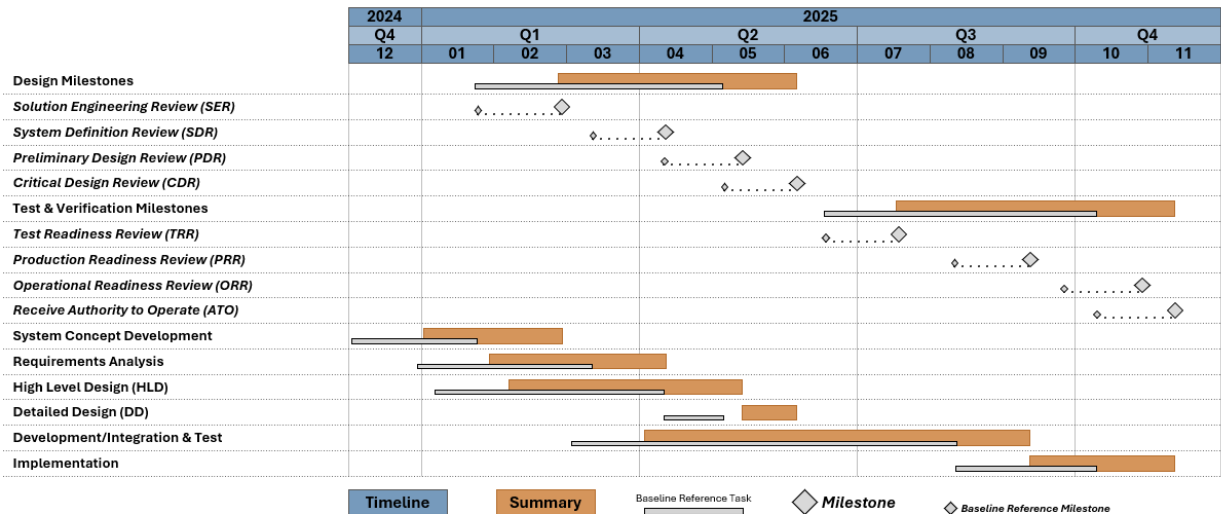
12. Navigate back to PowerPoint and open a blank slide.



13. Click the top half of the *Import Shapes* button in the *SSI Presentation Pro Ribbon*.



14. Observe the chart created. Notice that it follows the default options selected:

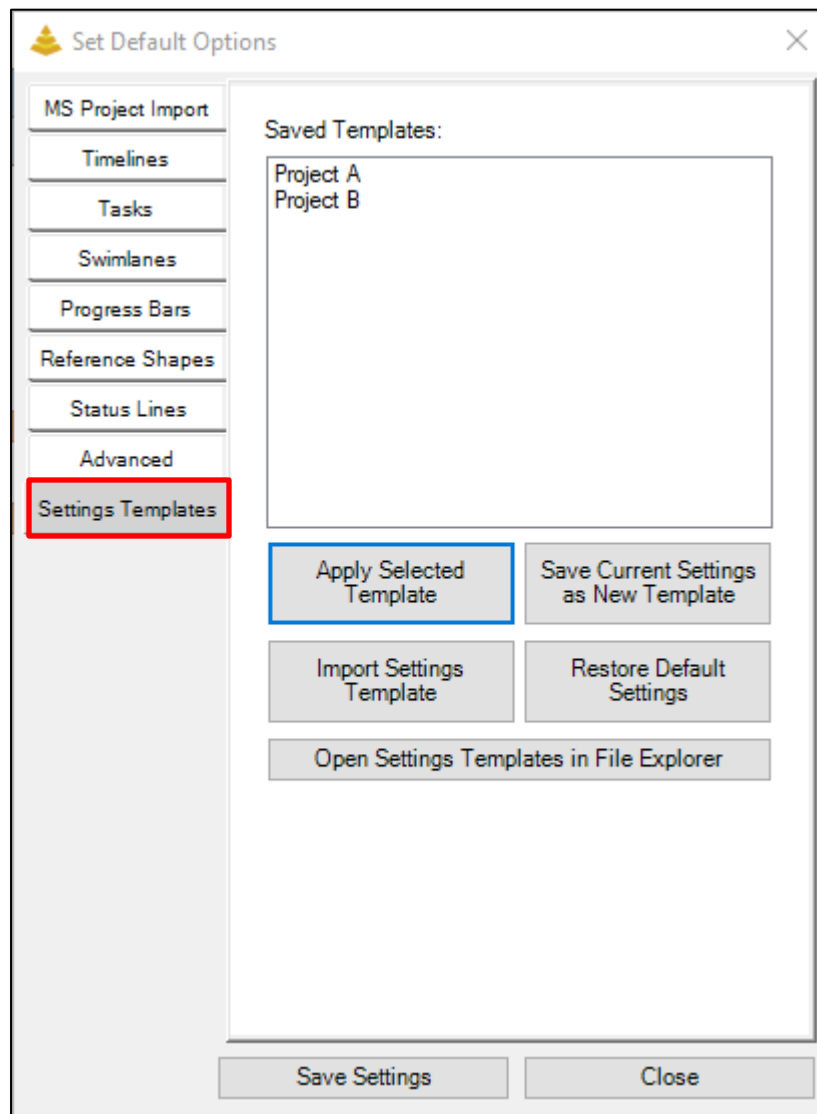


End of Practice Exercise

Settings Templates

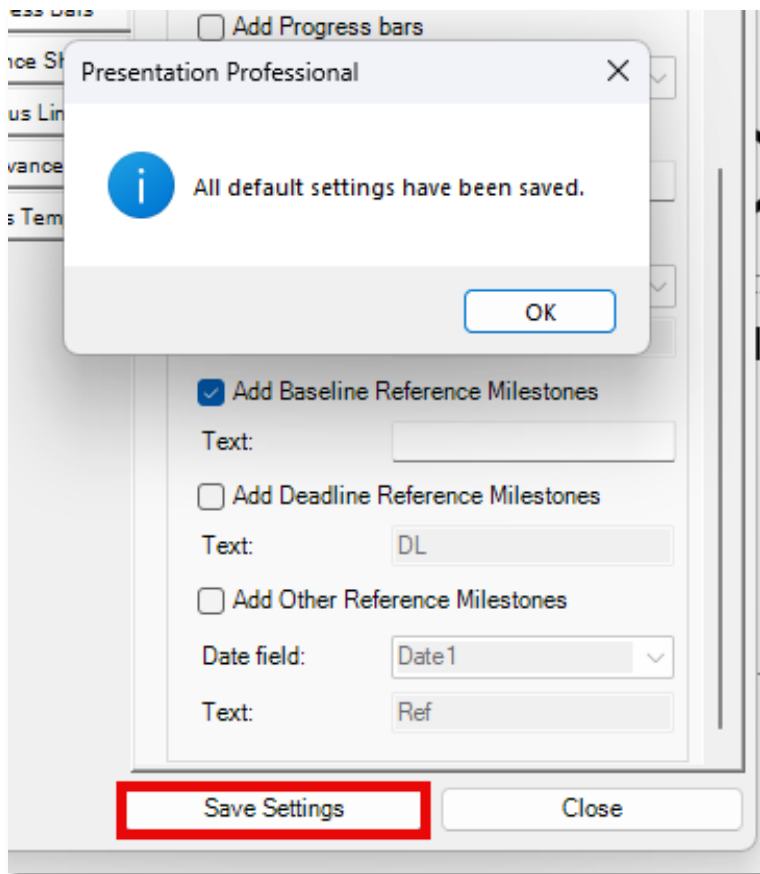
SSI Presentation Pro allows you to create *Settings Templates* that can be toggled on or off and distributed to other Presentation Pro users. A *Settings Template* is a **JSON** file that contains a specific set of Presentation Pro options. Settings Templates include all of options currently saved in the Default Options form and the Default Legends Form, including custom legends created.

Creating different Settings Templates is useful if you want to have one set of default options for a particular project, customer, or chart type and a different set of default options for a different project, customer, or chart type. Settings Template controls are in the *Presentation Pro Default Options* form under the tab *Settings Templates*

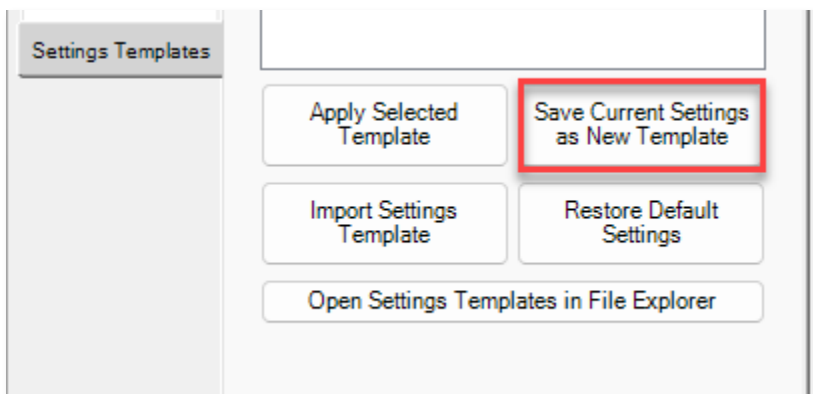


Creating a Settings Template

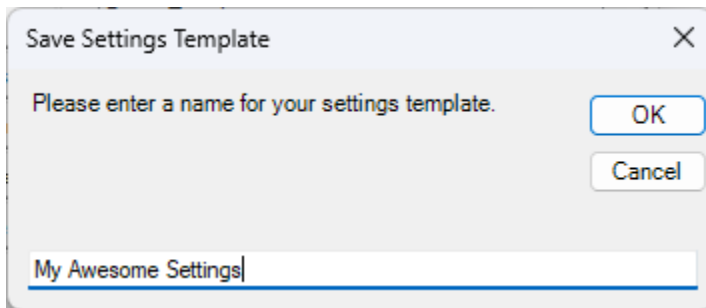
To create a Settings Template, you must first save the current options applied in the *Presentation Professional Default Options form*. You can save your current settings by clicking the **Save Settings** button at the bottom of the form. A message box will notify you that all default settings have been saved:



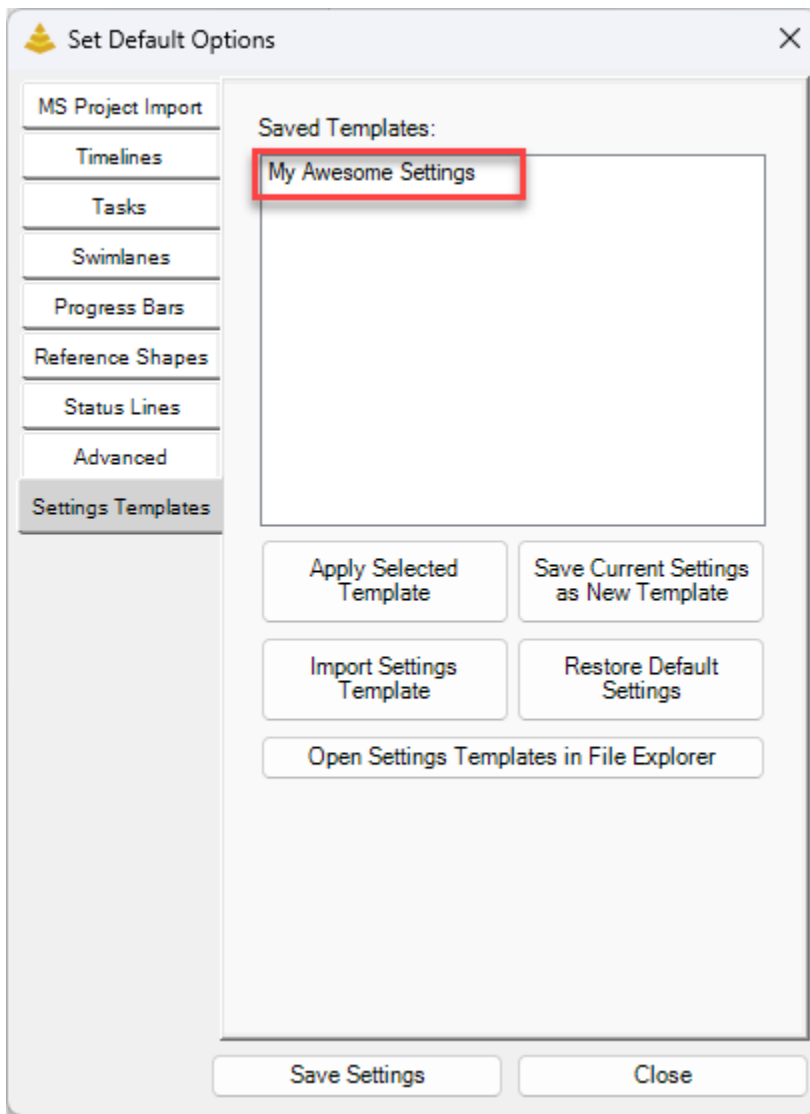
Once the current options have been saved, you are ready to create a Settings Template. A new Settings Template can be created by clicking the **Save Current Settings as New Template** button in the *Settings Templates* tab.



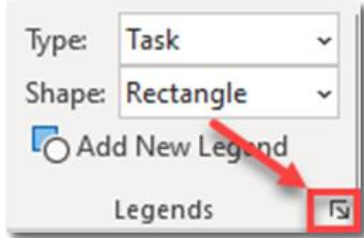
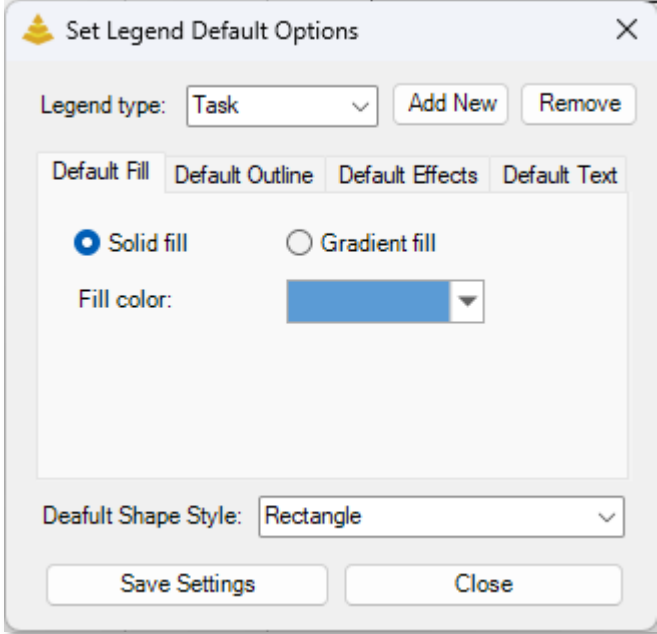
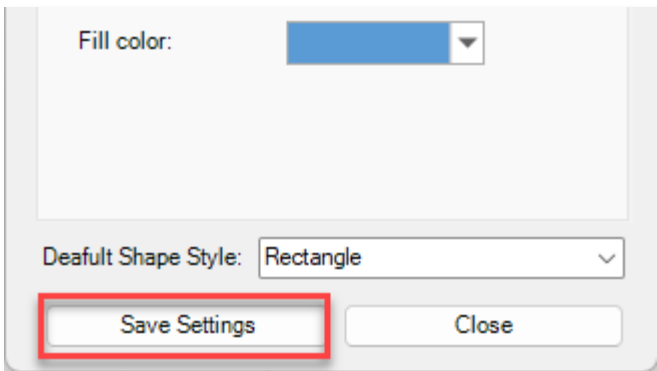
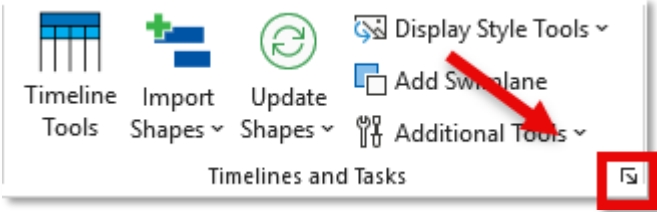
Once this button is clicked, you will be prompted to give your Settings Template a name:



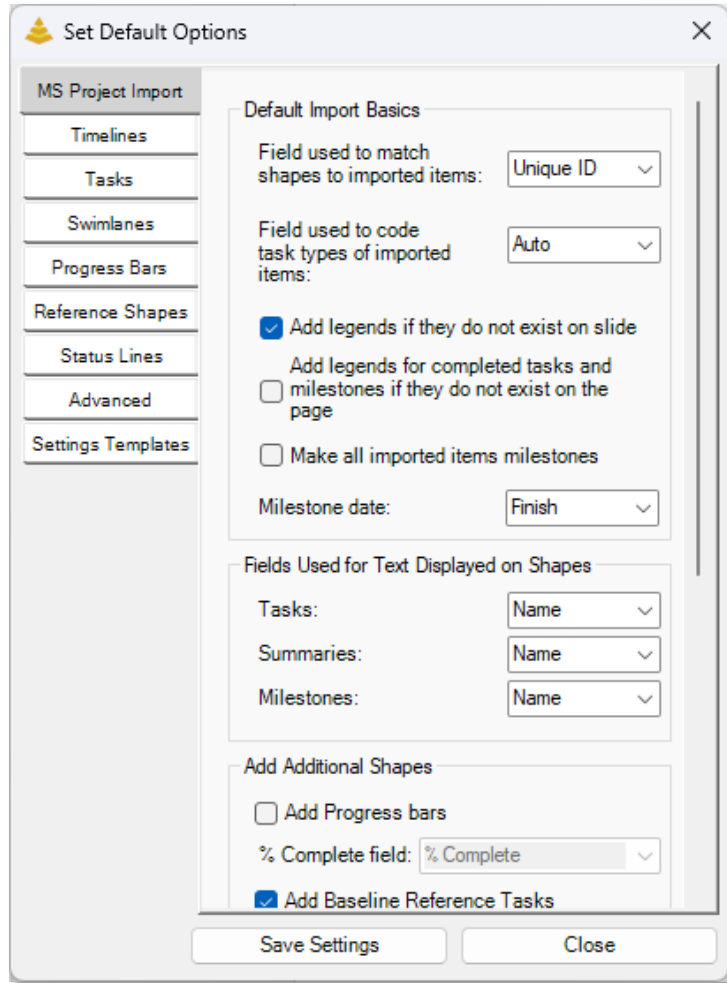
Enter whatever name you'd like into the box and then click the **OK** button to create the Settings Template. Once the template has been created, you will see it in the **Saved Templates** list:



Class Exercise –Creating a Settings Template

Start of Practice Exercise	
1. In PowerPoint, open the Legend Default Options form by clicking the button in the lower-right corner of the Legends Group in the SSI Presentation Pro Ribbon .	
2. Set whatever default styles you'd like for your legends using the Legend Default Options form .	
3. When you are satisfied with your legend options, click the Save Settings button in the bottom-left of the form.	
4. In PowerPoint, open the Presentation Pro Default Options form by clicking the button in the lower-right corner of the Timelines and Tasks Group in the SSI Presentation Pro Ribbon .	

5. Using the form, set any options you'd like.



Set Default Options

MS Project Import

- Timelines
- Tasks
- Swimlanes
- Progress Bars
- Reference Shapes
- Status Lines
- Advanced
- Settings Templates

Default Import Basics

Field used to match shapes to imported items: Unique ID

Field used to code task types of imported items: Auto

☒ Add legends if they do not exist on slide

Add legends for completed tasks and milestones if they do not exist on the page

☐ Make all imported items milestones

Milestone date: Finish

Fields Used for Text Displayed on Shapes

Tasks: Name

Summaries: Name

Milestones: Name

Add Additional Shapes

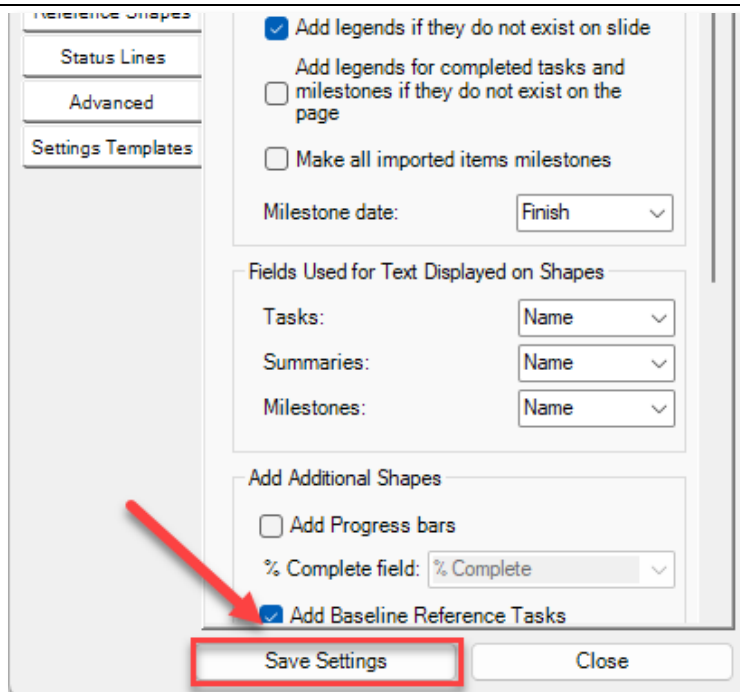
☐ Add Progress bars

% Complete field: % Complete

☒ Add Baseline Reference Tasks

Save Settings Close

6. When you are satisfied with your selections, click the **Save Settings** button at the bottom of the form.



Reference Shapes

- Status Lines
- Advanced
- Settings Templates

☒ Add legends if they do not exist on slide

Add legends for completed tasks and milestones if they do not exist on the page

☐ Make all imported items milestones

Milestone date: Finish

Fields Used for Text Displayed on Shapes

Tasks: Name

Summaries: Name

Milestones: Name

Add Additional Shapes

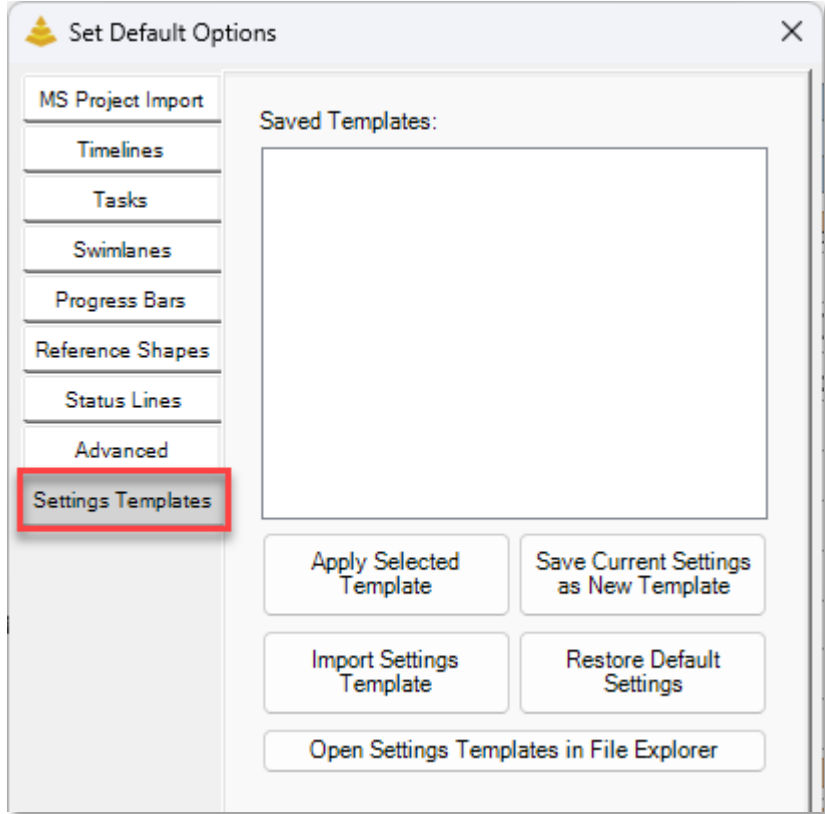
☐ Add Progress bars

% Complete field: % Complete

☒ Add Baseline Reference Tasks

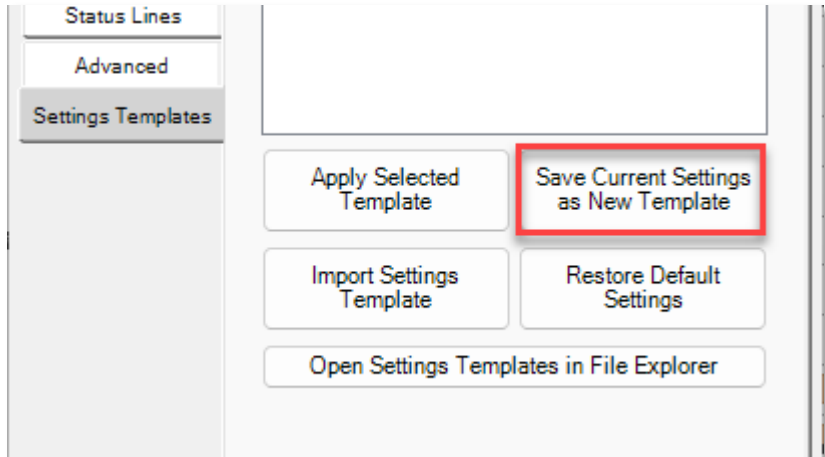
Save Settings Close

7. Navigate to the **Settings Templates** tab of the form.



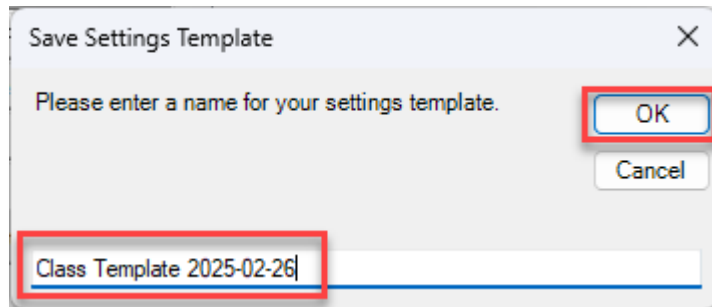
The dialog box titled "Set Default Options" has a sidebar on the left with the following tabs: MS Project Import, Timelines, Tasks, Swimlanes, Progress Bars, Reference Shapes, Status Lines, Advanced, and Settings Templates. The "Settings Templates" tab is highlighted with a red box. The main area on the right is titled "Saved Templates:" and contains a large empty rectangular box. Below this box are five buttons: "Apply Selected Template", "Save Current Settings as New Template", "Import Settings Template", "Restore Default Settings", and "Open Settings Templates in File Explorer".

8. Click the **Save Current Settings as New Template** button.



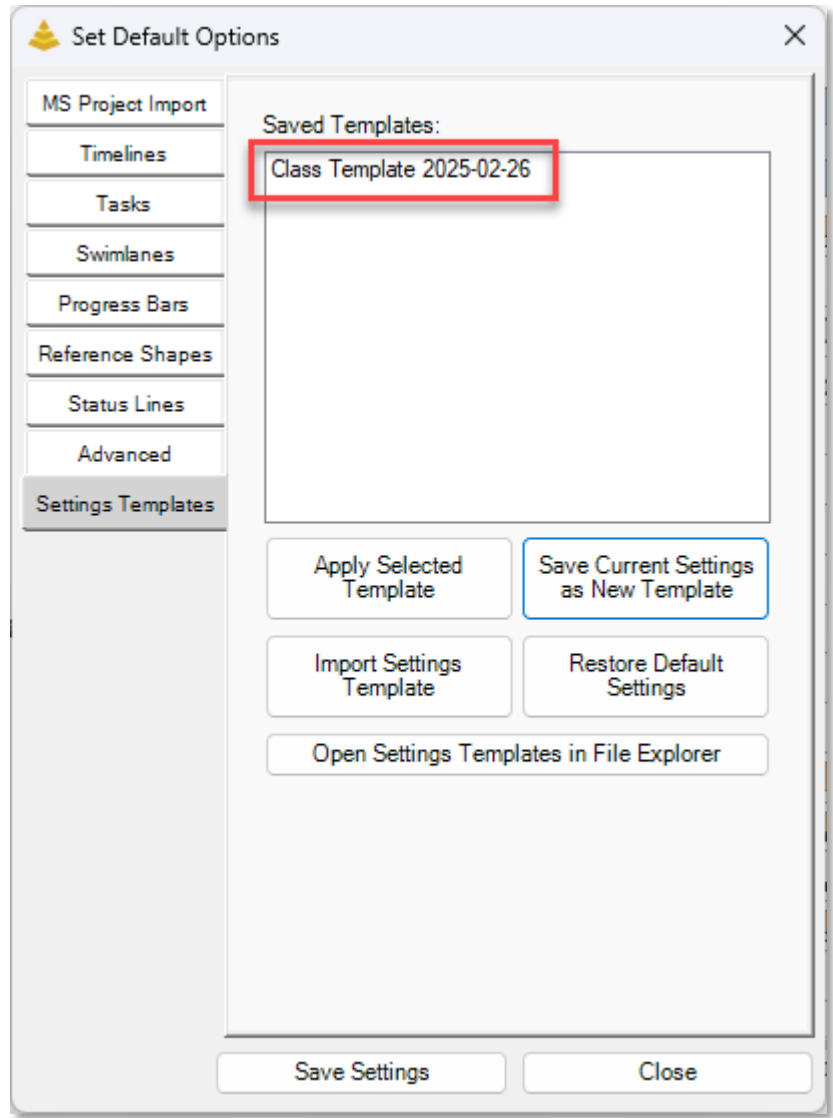
This is a second view of the "Set Default Options" dialog box. The "Settings Templates" tab is still selected in the sidebar. In this view, the "Save Current Settings as New Template" button is highlighted with a red box.

9. In the dialog that opens, title your Settings Template "Class Template [DATE]" replace [DATE] with today's date in yyyy-MM-dd format. Then click the **OK** button.



The dialog box titled "Save Settings Template" contains the text "Please enter a name for your settings template." Below this text is a text input field containing the text "Class Template 2025-02-26". To the right of the input field are two buttons: "OK" and "Cancel". The "OK" button is highlighted with a red box.

10. Notice your template appearing in the list



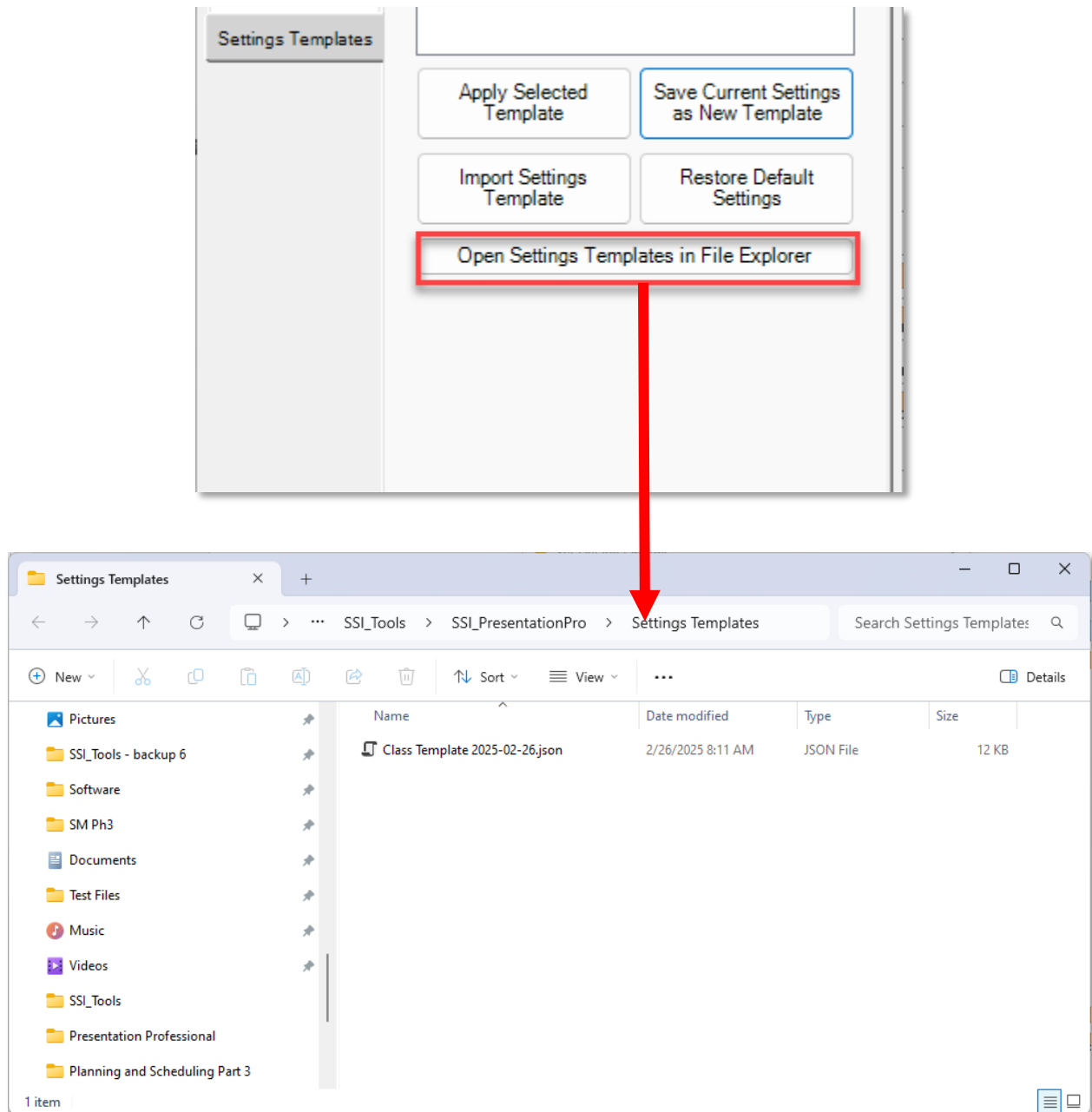
End of Practice Exercise

Accessing Settings Template JSON Files

Once Settings Templates have been created, they can be accessed in a standard *Windows File Explorer*. Settings Templates are saved in this location as JSON files:

[SSI Installation Location]\SSI_Tools\SSI_PresentationPro\Settings Templates

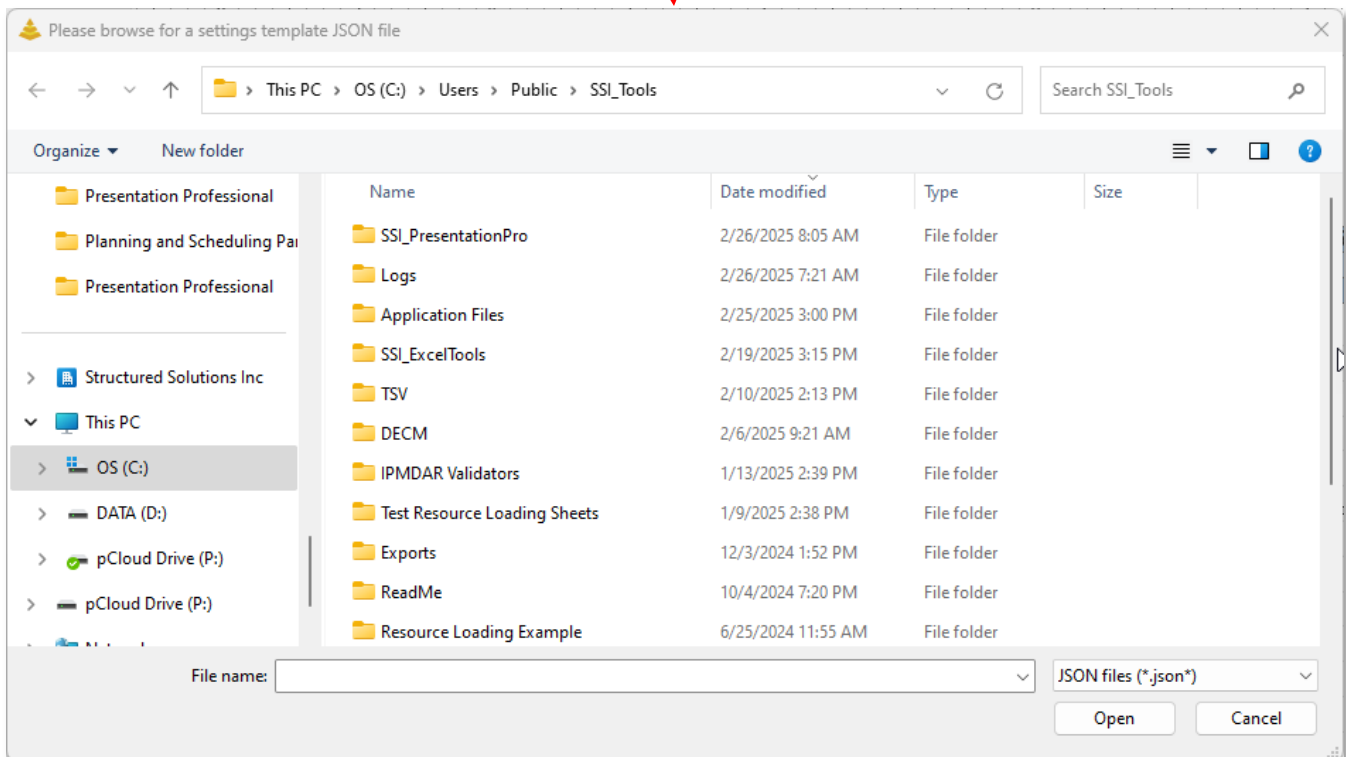
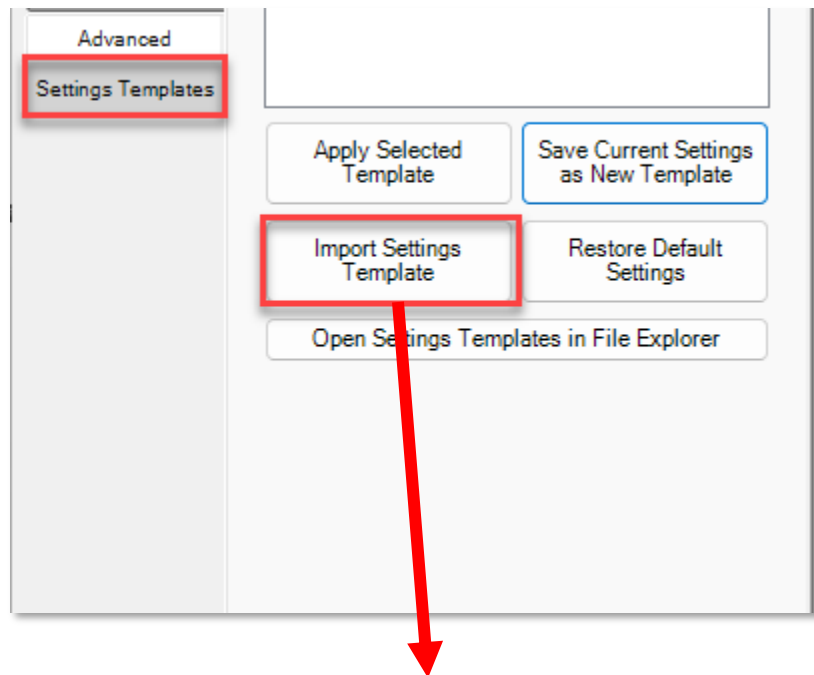
You can quickly access this folder by clicking on the *Open Settings Templates in File Explorer* button:



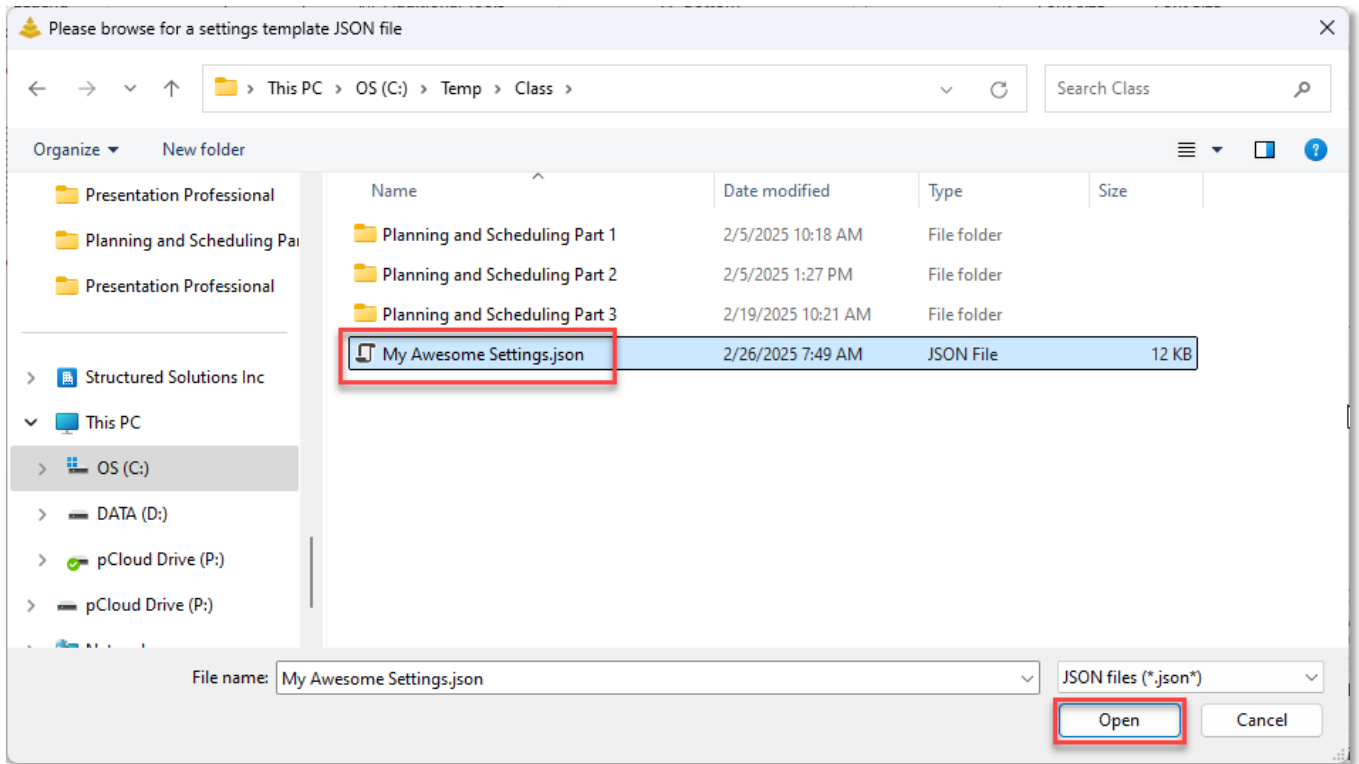
From the File Explorer, you can delete or rename any of your settings templates. Having access to JSON files allows you to be able to send Settings Templates to team members.

Importing Settings Templates

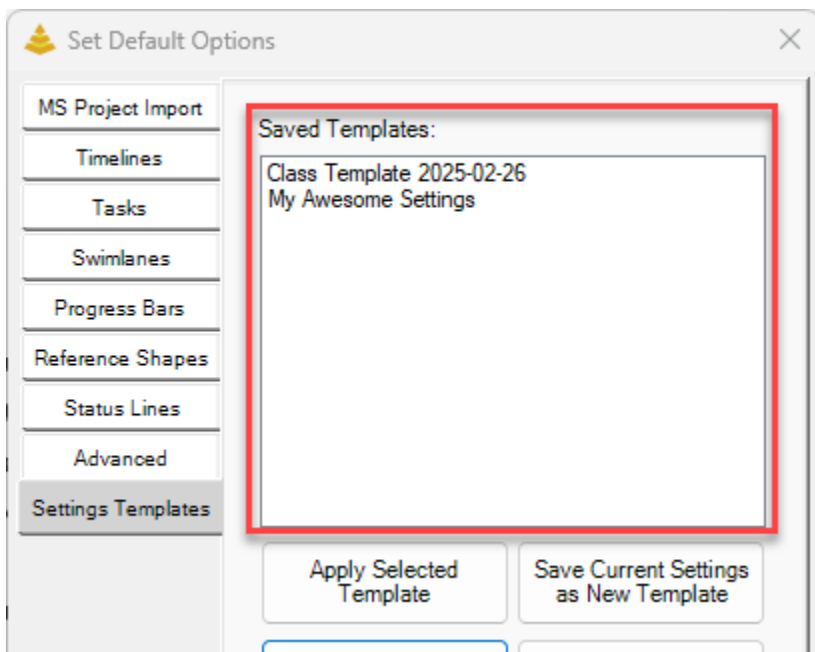
You can import a settings template from any location on your file system by clicking the **Import Settings Template** button in the **Settings Templates** tab of the **Presentation Pro Default Options form**. When this button is clicked, a File Explorer will open that will allow you to browse for the Settings Template you would like to Import. Only JSON files are allowed to be selected.



Find and select your desired Template, then click the *Open* button at the bottom-right of the File Explorer dialog:



If the import is successful, you will see the new template appear in your list of saved templates:

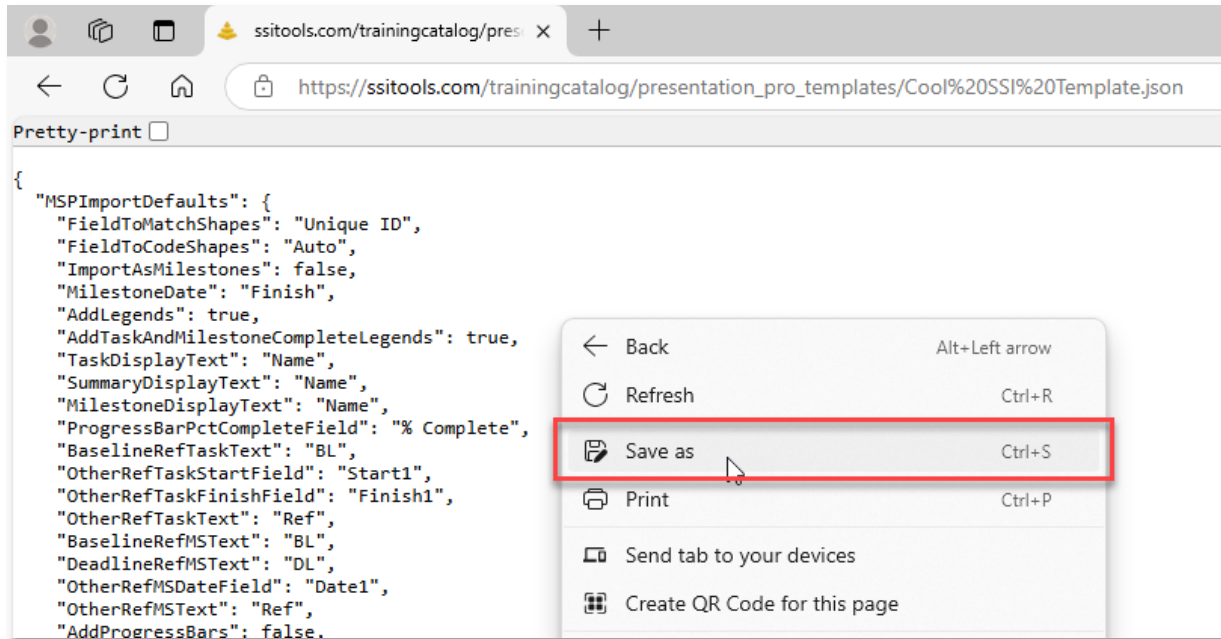


Class Exercise –Importing a Settings Template**Start of Practice Exercise**

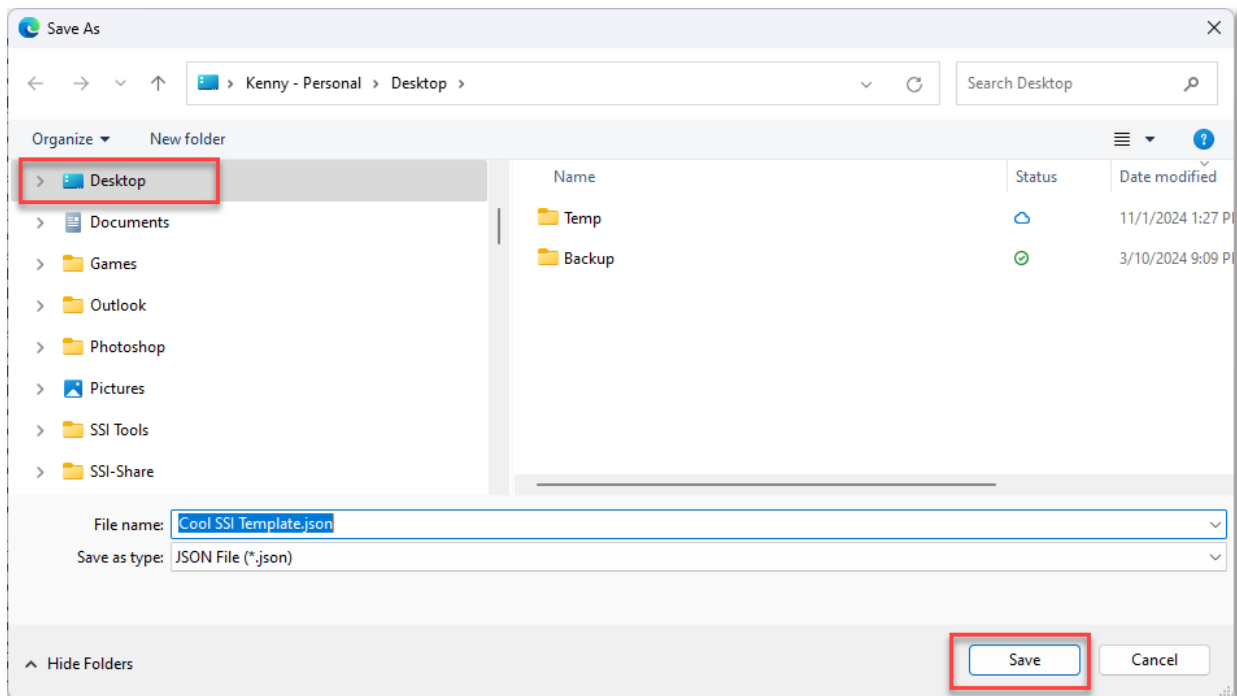
1. Open this URL in a web browser:

https://ssitools.com/trainingcatalog/presentation_pro_templates/Cool%20SSI%20Template.json

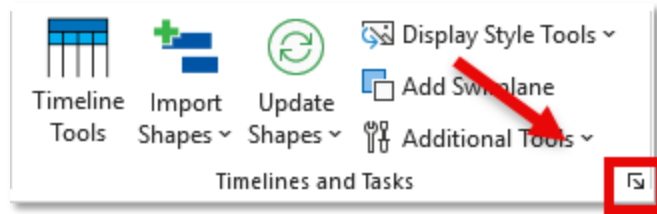
2. Right click anywhere on the white space of the webpage and click the **Save As** button from the menu:



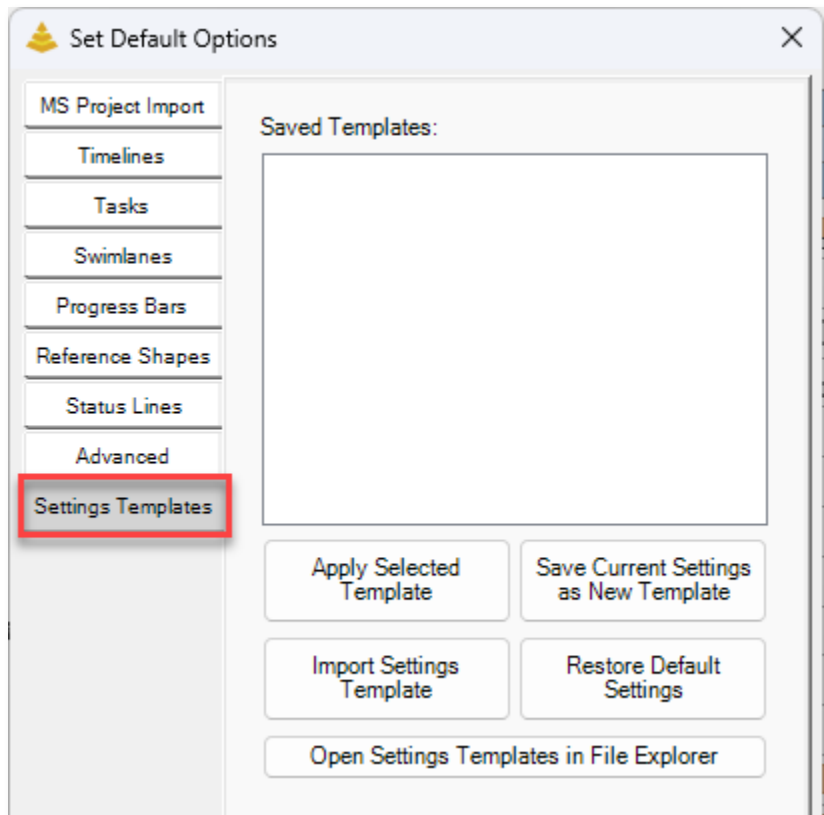
3. Save the JSON file to your desktop:



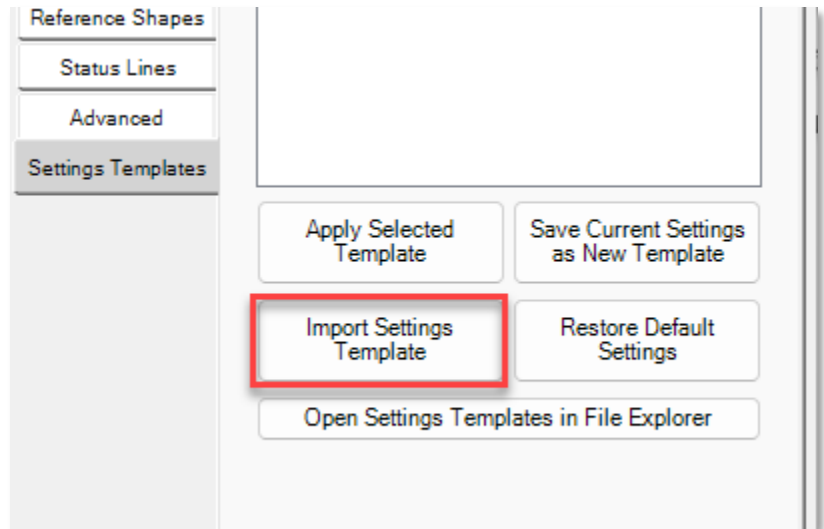
4. In PowerPoint, open the **Presentation Pro Default Options form** by clicking the button in the lower-right corner of the **Timelines and Tasks Group** in the **SSI Presentation Pro Ribbon**.



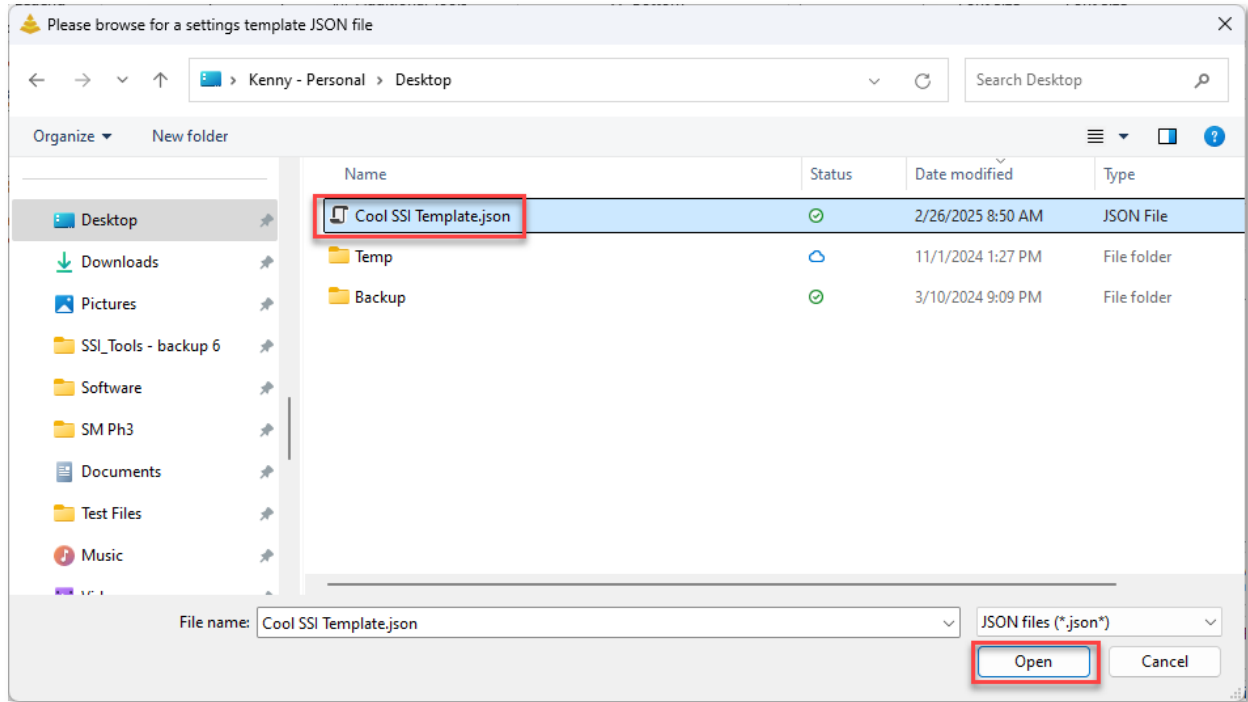
5. Navigate to the **Settings Templates** tab of the form.



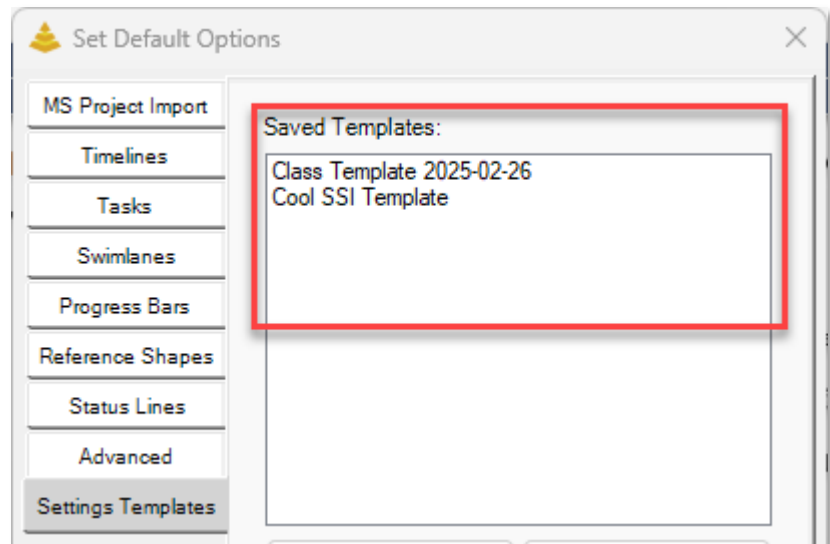
6. Click the **Import Settings Template** button.



7. In the File Explorer that opens, browse to your Desktop and select the *Cool SSI Template.json* file that you just saved. Then click the *Open* button:



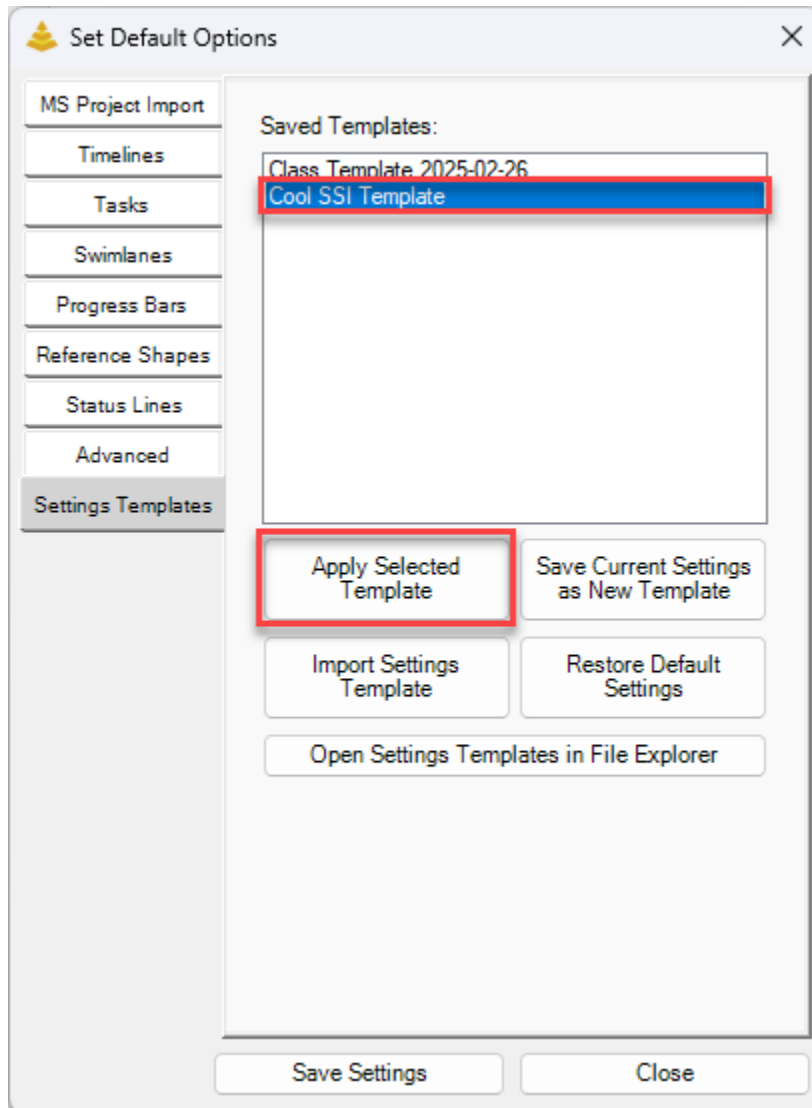
8. Observe that the template has been added to the list of saved templates



End of Practice Exercise

Applying Settings Templates

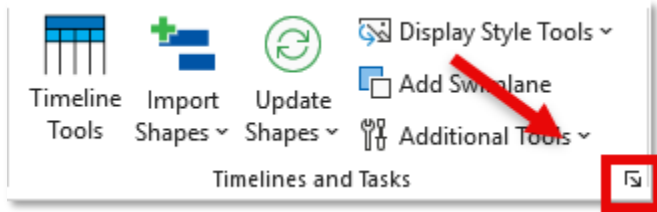
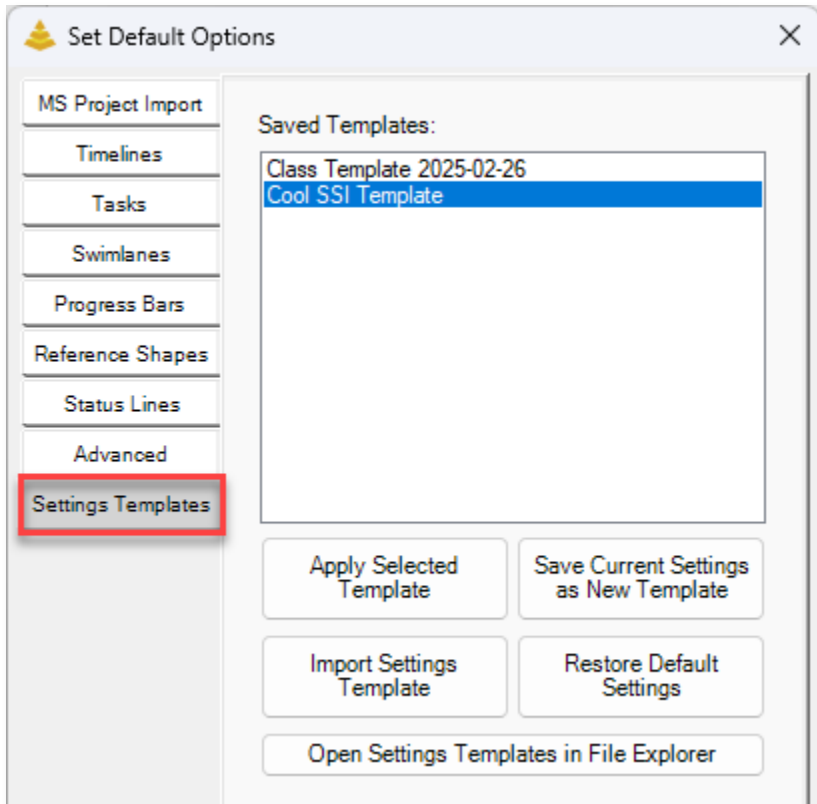
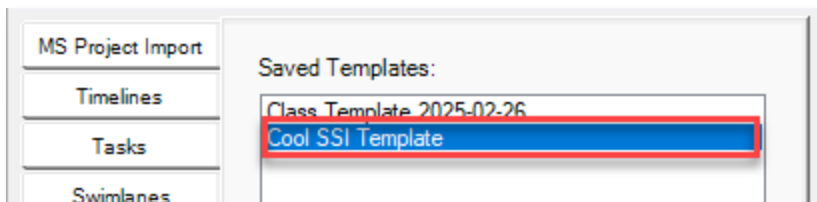
To apply the settings saved in a Settings Template, select the template you wish to apply from the *Saved Templates List*, then click the *Apply Selected Template* button:



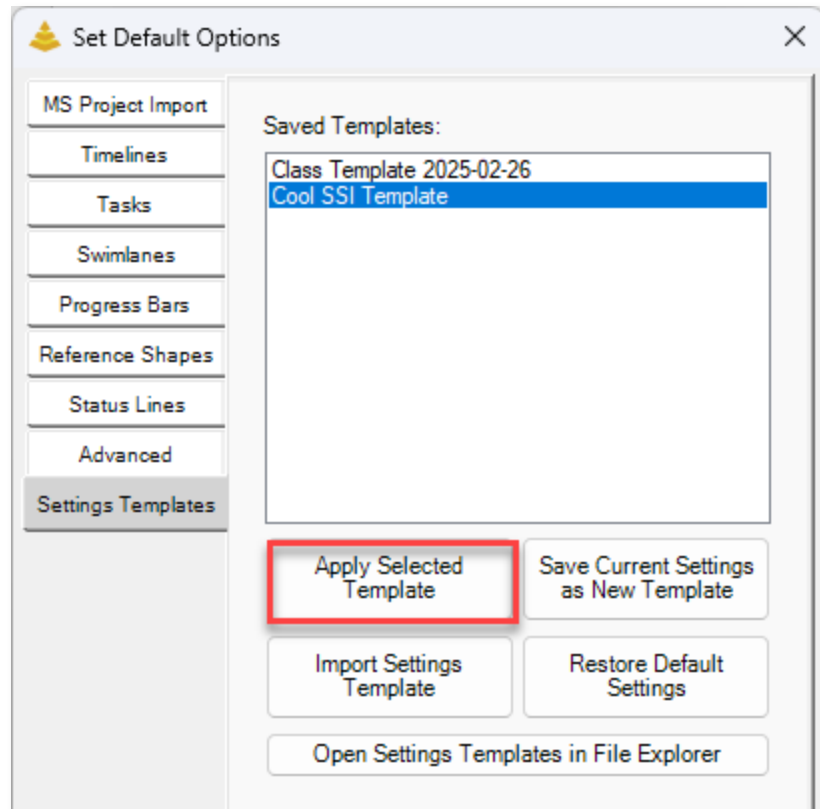
After the *Apply Selected Template* button is clicked, all the Presentation Pro default options, including default legend options will be set to match the selected Settings Template.

It's important to note that after applying a template, Presentation Pro does not know that it is on that template, it just switches all current options to match that template at the time you apply it. You can still change options after the fact, but those changes will not be saved to the template file. An existing template can be saved with new changes by following the process to save a new template but giving it the same name as the template you want to save. This will overwrite the existing template with all of the new options selected.

Class Exercise –Applying a Settings Template

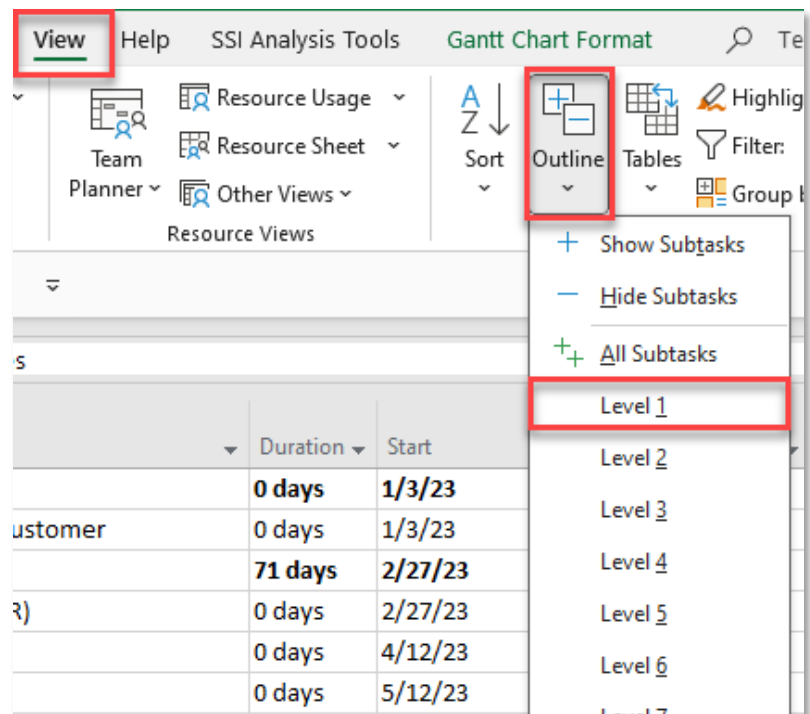
Start of Practice Exercise	
1. In PowerPoint, open the <i>Presentation Pro Default Options form</i> by clicking the button in the lower-right corner of the <i>Timelines and Tasks Group</i> in the <i>SSI Presentation Pro Ribbon</i> .	
2. Navigate to the <i>Settings Templates</i> tab of the form.	
3. Select the <i>Cool SSI Template</i> you imported from the previous exercise (go back in necessary) from the <i>Saved Templates list</i> .	

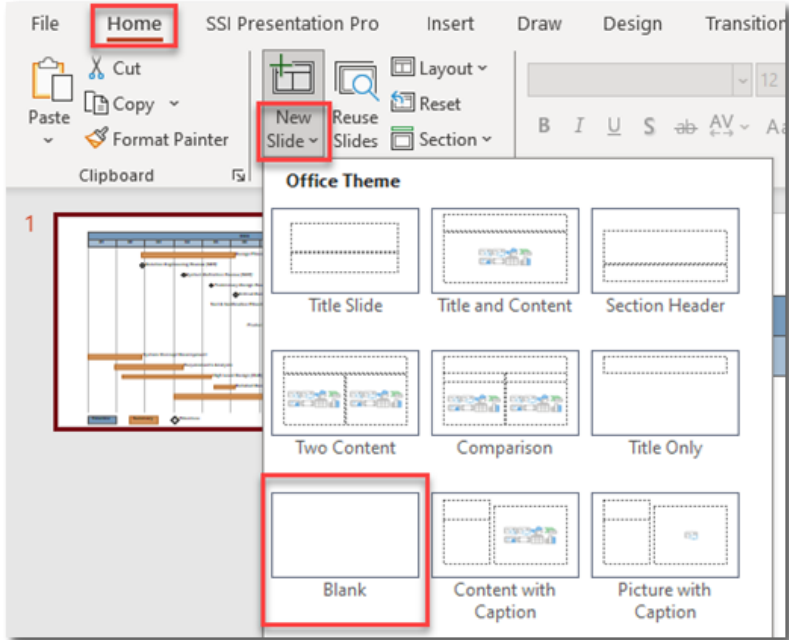
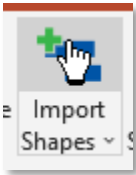
4. Click the **Apply Selected Template** button.



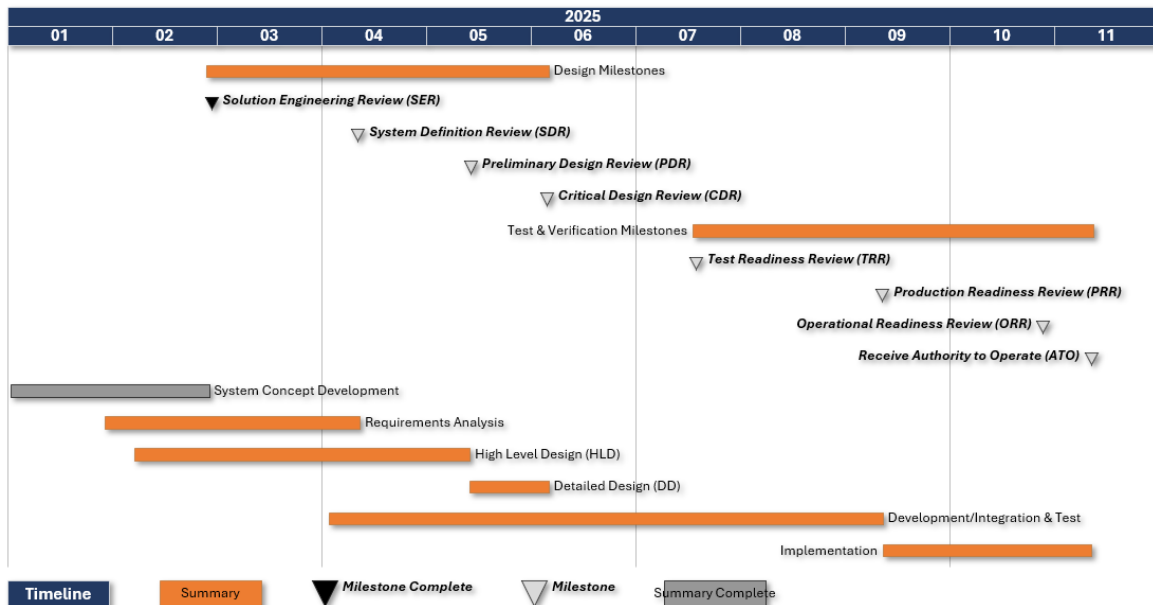
5. Close the **Presentation Pro** default options form

6. Open the [SSi Example Project file](#) in **Microsoft Project**. Set the outline to Level 1 by using the **Outline** menu on the **View Ribbon**.

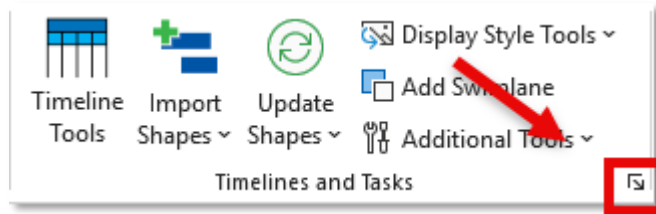


7. Click the small triangle button to the left of the name of the summaries on rows 3 and 8 to display their child tasks, then select all activities from row 3 down.	
8. Navigate back to PowerPoint and open a blank slide.	
9. Click the top half of the <i>Import Shapes</i> button in the <i>SSI Presentation Pro Ribbon</i>.	

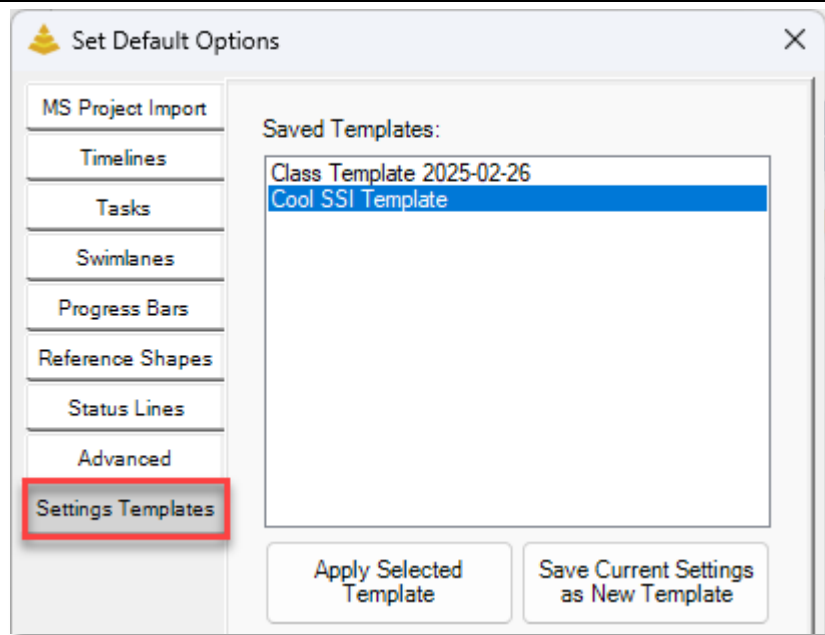
10. Observe the chart created:



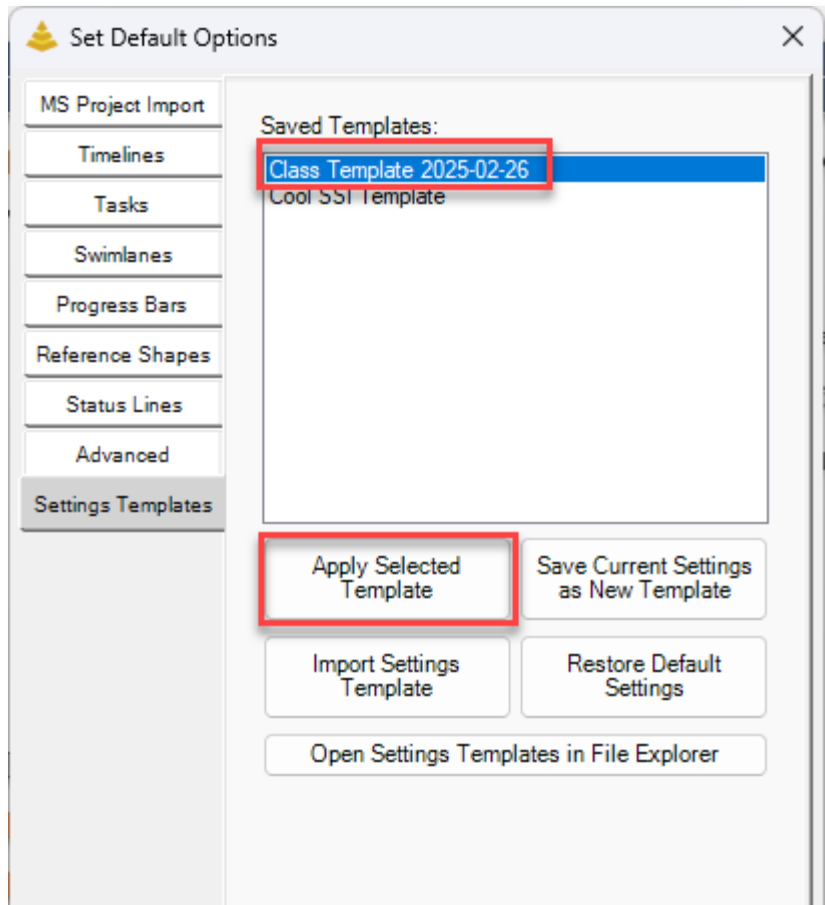
11. Reopen the *Presentation Pro Default Options* form by clicking the button in the lower-right corner of the *Timelines and Tasks Group* in the *SSI Presentation Pro Ribbon*.



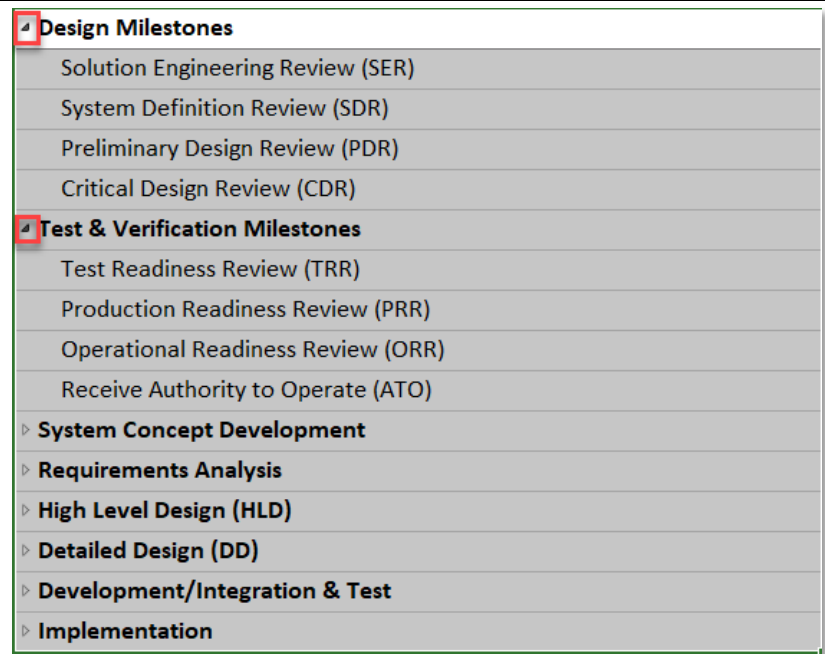
12. Navigate to the *Settings Templates* tab of the form.



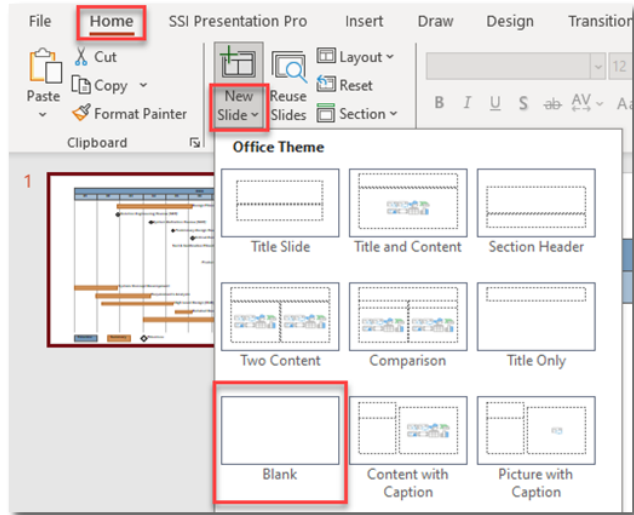
13. Select the class template you created from the *Creating a Settings Template exercise* earlier in this document (go back if necessary) then click *Apply Selected Template*.



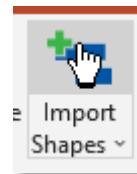
14. Ensure the same tasks from the SSI Example Project from step 7 are still selected.



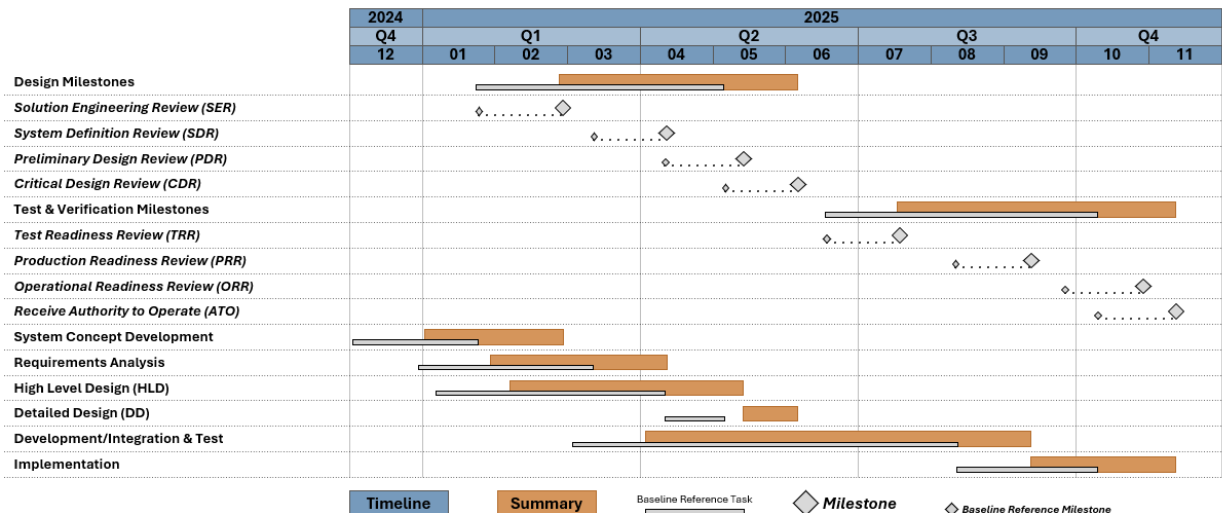
15. Add another blank slide in your PowerPoint presentation.



16. Click the top half of the *Import Shapes* button in the *SSI Presentation Pro Ribbon*.



17. Observe the chart created:

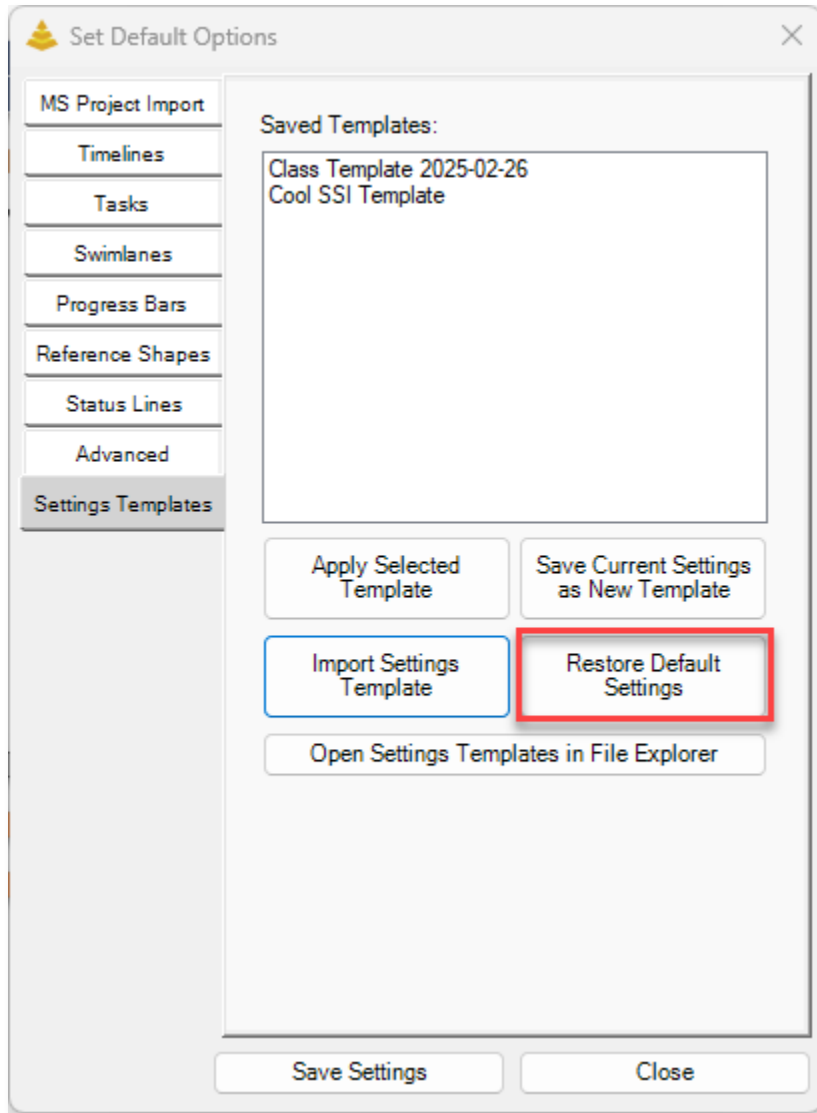


Notice this chart now follows the settings from the class template, rather than the other template.

End of Practice Exercise

Restoring Presentation Pro Factory Settings

If at any point you would like to reset the currently applied settings to their factory default options, select the ***Restore Default Settings*** button in the ***Settings Templates tab*** of the ***Presentation Pro Default Options form***.



This will not delete any saved Settings Templates, and you can reapply the options from a saved Settings Template at any time.