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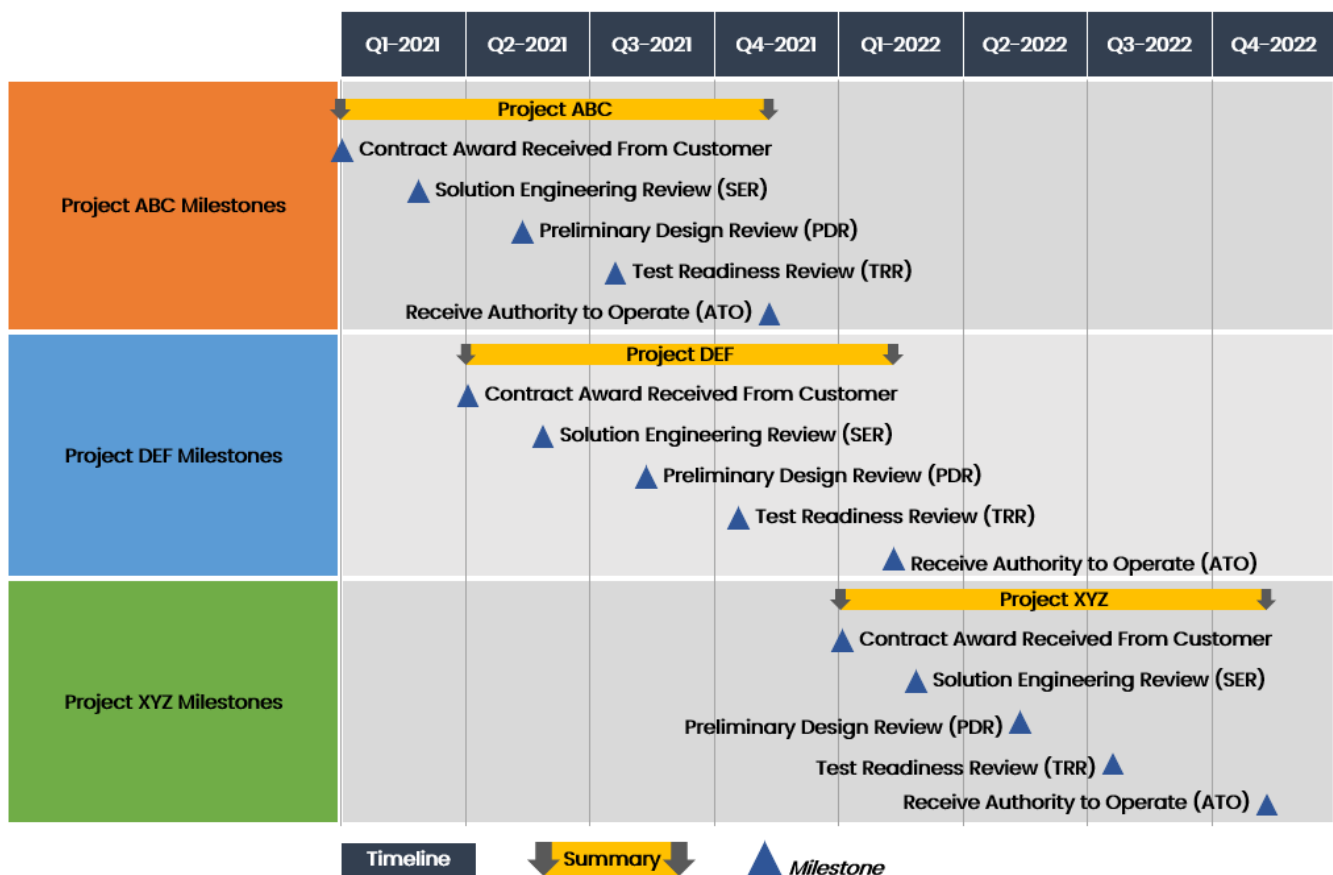
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Presentation Pro – Creating Charts from Multiple Schedule Files

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 how to create charts that contain data from multiple Microsoft Project files.



Creating Charts with Activities from Multiple Project Files

When building charts, Presentation Pro always assigns activities it imports with their Unique ID from Microsoft Project. However, Presentation Pro does not retain any information about which project those activities belong to. Essentially, PowerPoint presentations containing Presentation Pro charts and the Microsoft Project files used to create them have a "soft connection." This connection only exists when activities are imported from Project or when charts are updated with current Project dates. Outside of these functions, the Project file used to create the chart and the PowerPoint presentation containing the chart are not linked. This is beneficial because it allows you to move, rename, or overwrite both the Project and PowerPoint files without causing any data connection or stability issues.

It's important to understand that Presentation Pro does not know which project was used to create a chart—it only knows the Unique IDs of the activities on the chart. When an update is performed, Presentation Pro connects to a project file, locates the activities with matching Unique IDs, and updates their start and finish dates accordingly in the chart. Normally, Presentation Pro can only connect to a single project. For instance, if a chart includes an activity coded with Unique ID '3,' that activity will be updated with the start and finish dates of Unique ID '3' from the connected Project file. This poses a challenge if you want to build a chart that contains data from multiple project files that both have an activity with Unique ID '3'.

Fortunately, there is a method to build charts with Presentation Pro that include data from more than one project while still allowing Presentation Pro to update them.

Understanding Project File's 'Category'

To create a chart that includes activities from multiple Project files, Presentation Pro needs to code not only the Unique IDs of the activities but also the Project file's **Category** value. The **Category** of a Project refers to a property within the Project file named "Category." This property is a static text field that doesn't impact any other data in the schedule when modified.

Presentation Pro can use a project's **Category** value to distinguish which project the activities belong to. This is the key to enabling Presentation Pro to update activities in a chart with the data from the correct project files. For example, if an activity is coded with Unique ID '3' *and* Category 'PrjA,' Presentation Pro will know that the updated dates for that activity should come from the Project file where the Category is set to 'PrjA.' When the update function is triggered.

For this process to work correctly, each Project file included in a single chart must have a unique value set for the **Category** property. For example, if two projects both have the Category 'PrjA,' Presentation Pro will *not* be able to differentiate between them. However, if one Project has the Category 'PrjA' and the other 'PrjB,' Presentation Pro *will* be able to distinguish between the two.

Setting a Project File's Category Value

To set the *Category* property of a project, complete the following steps:

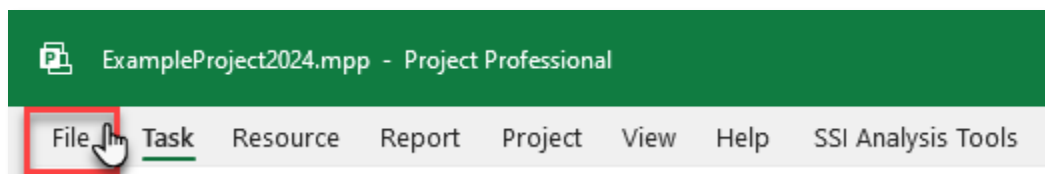
1. Open the Project File

Launch Microsoft Project and open the project file for which you want to edit the Category property.



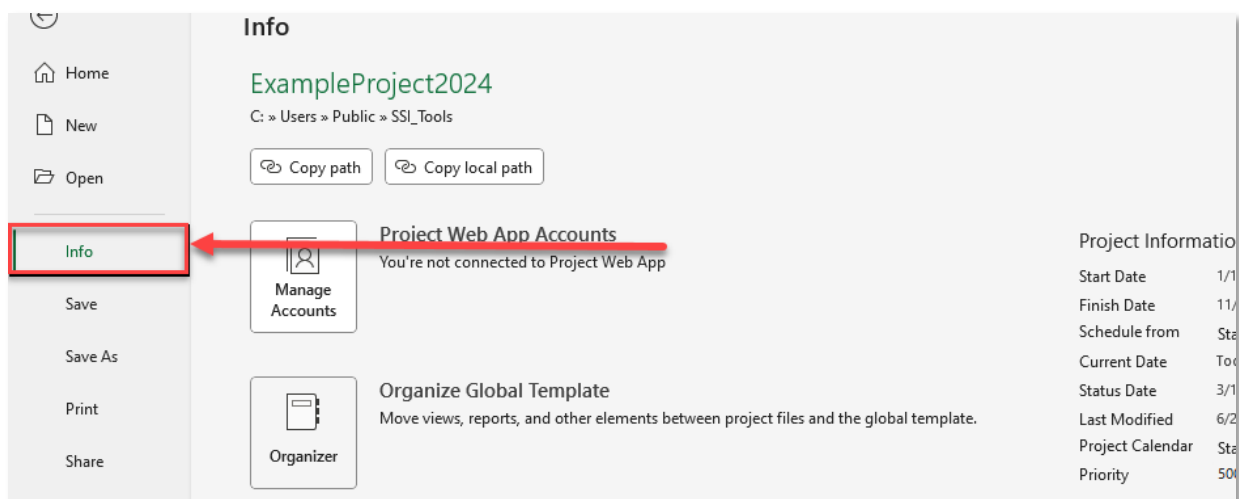
2. Access the Backstage View

Click on the **File** tab in the top-left corner of the Microsoft Project window. This will open the Backstage view, where you can access various file-related options.



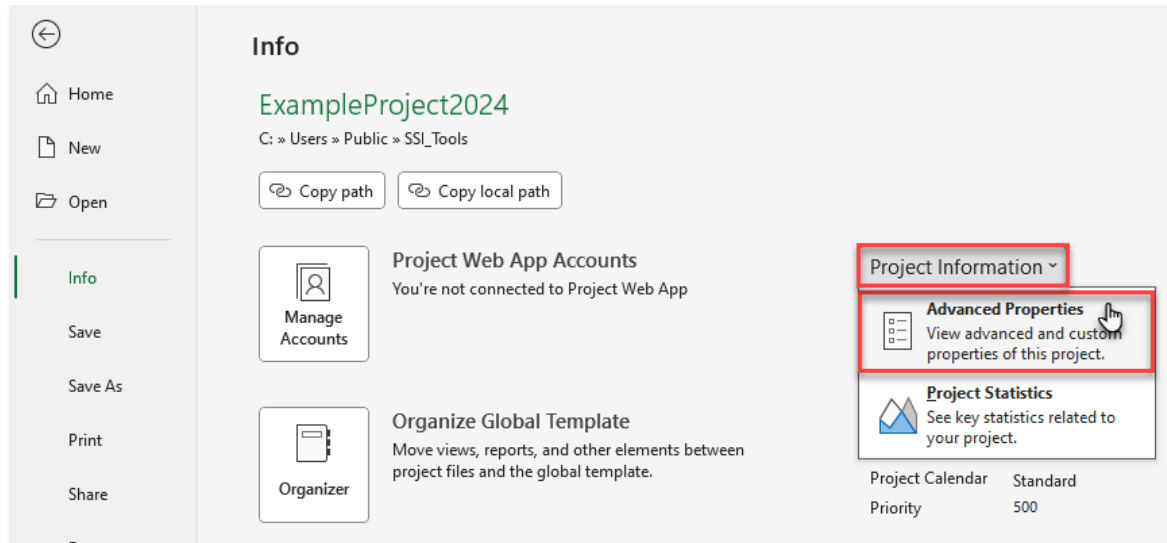
3. Open the Project Information

In the Backstage view, select **Info** from the left-hand menu. This section displays various properties and details about your project.



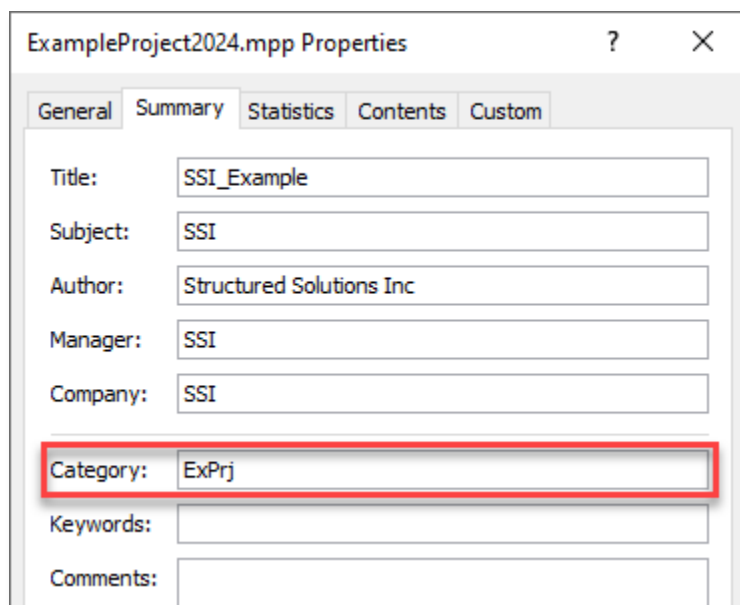
4. Access Advanced Properties:

- In the Info section, look for the **Project Information** box on the right side of the screen.
- Click on the **Project Information** drop-down menu, then select **Advanced Properties**. This will open the Project Properties dialog box.



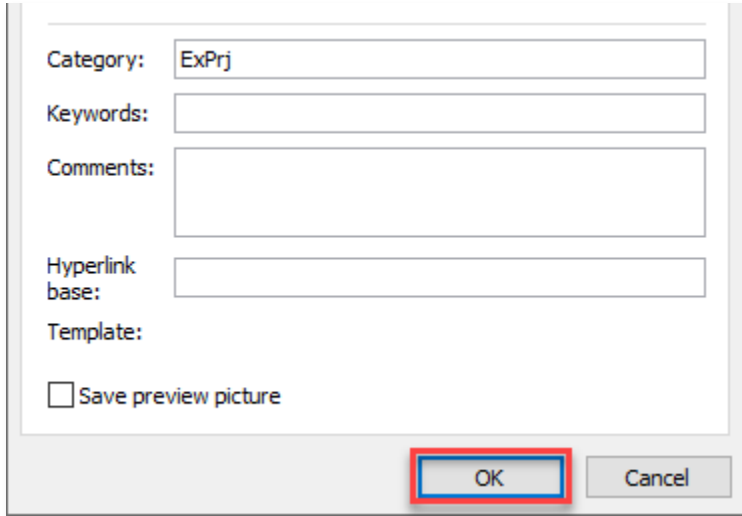
5. Edit the Category Property:

- In the Project Properties dialog box, navigate to the **Summary** tab.
- Locate the **Category** field in the list of properties. This field may be blank or contain an existing value.
- Click in the Category field and enter the desired text value that will represent the category for your project.

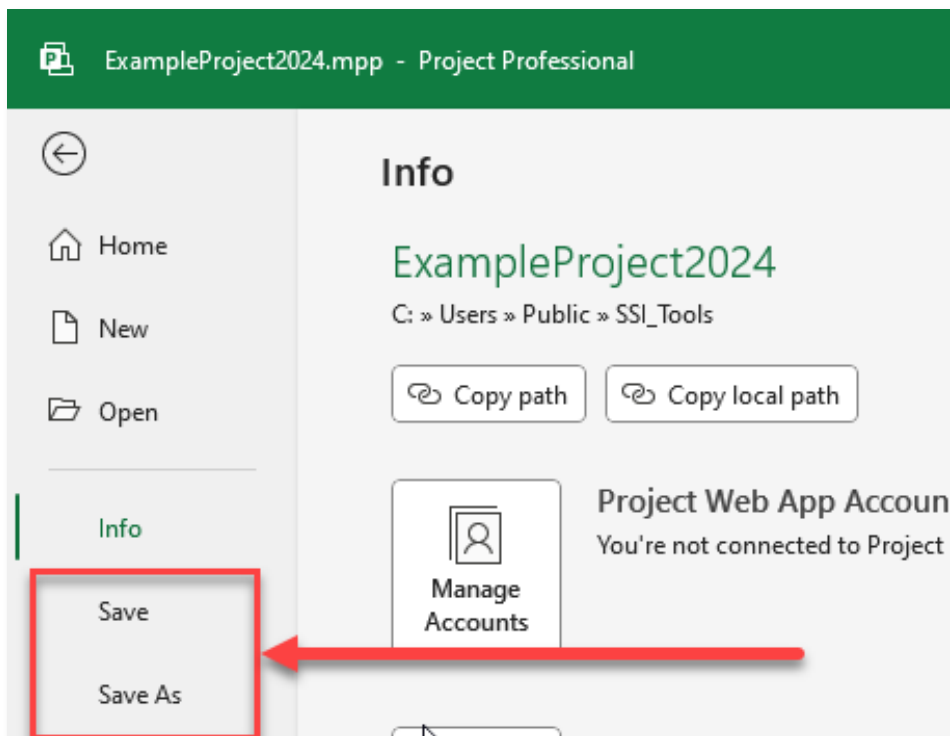


6. Save the Changes:

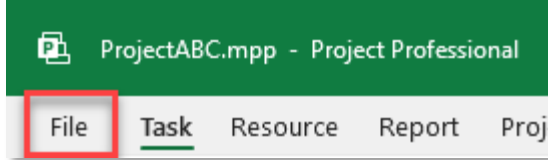
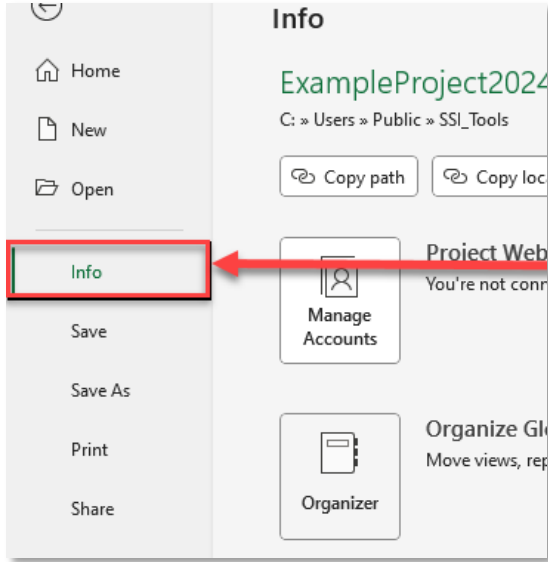
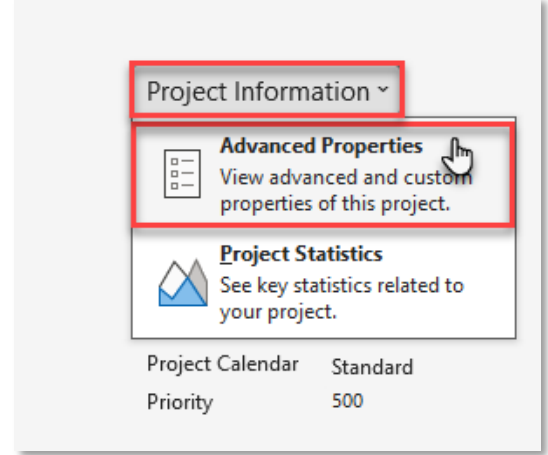
- After entering the Category value, click **OK** to close the Project Properties dialog box.
- To ensure your changes are saved, click **Save** in the Backstage view or use the **Ctrl + S** shortcut to save the project file.



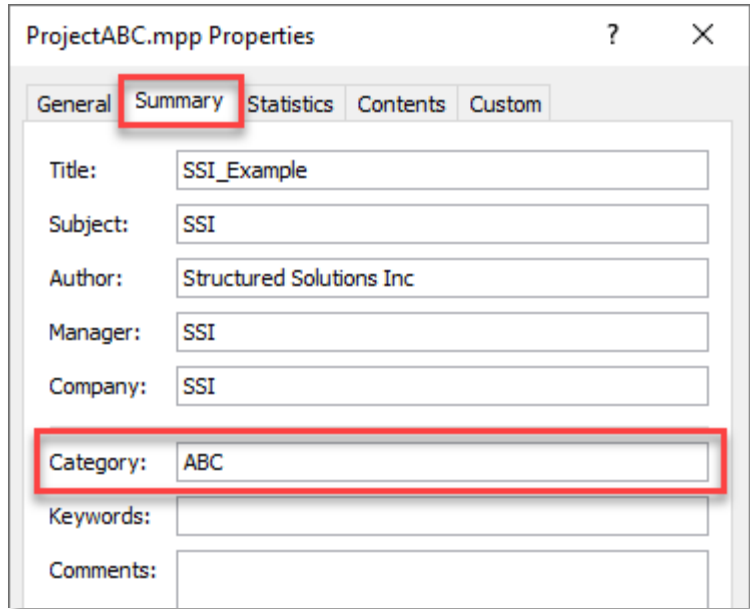
A screenshot of the Project Properties dialog box. It contains several input fields: 'Category' with the value 'ExPrj', 'Keywords', 'Comments', 'Hyperlink base', and 'Template'. At the bottom, there is a checkbox labeled 'Save preview picture' which is unchecked. The 'OK' button is highlighted with a red rectangle.



Class Exercise – Setting Project Categories

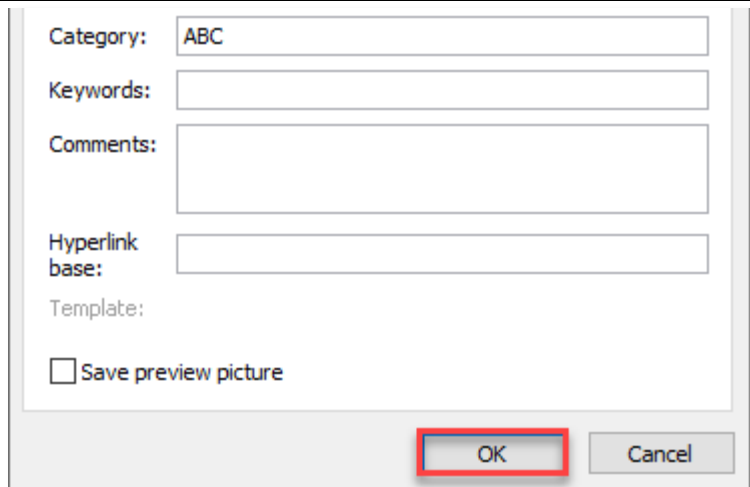
Start of Practice Exercise	
1. Download these two Microsoft Project files: ProjectABC.mpp ProjectDEF.mpp	
2. Open ProjectABC in Microsoft Project.	
3. After Project ABC has been opened, click on the File tab in the top-left corner of the Microsoft Project window to open the backstage view.	
4. In the Backstage view, select Info from the left-hand menu.	
5. In the Info section, look for the Project Information box on the right side of the screen. Click on Project Information to reveal a drop-down menu, then select Advanced Properties . This will open the Project Properties dialog box.	

6. In the **Summary** tab of the **Project Properties dialog box**, Set the **Category** property to "ABC"



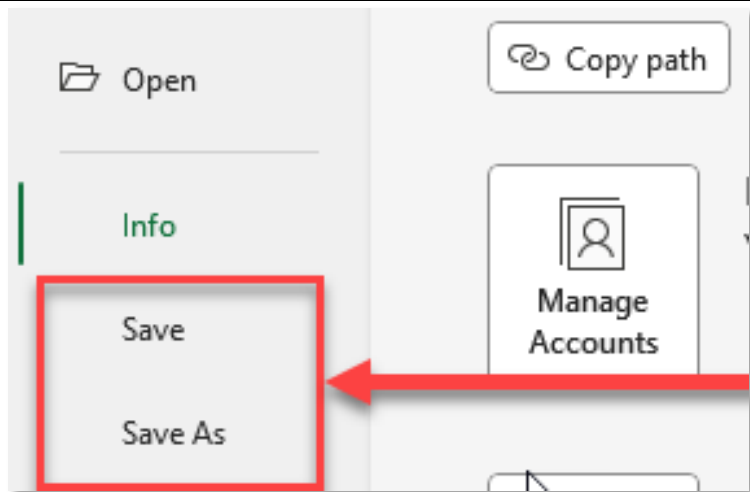
The image shows the 'ProjectABC.mpp Properties' dialog box with the 'Summary' tab selected. The 'Category' field is highlighted with a red box and contains the text 'ABC'. Other fields include Title (SSI_Example), Subject (SSI), Author (Structured Solutions Inc), Manager (SSI), and Company (SSI). The 'Keywords' and 'Comments' fields are empty.

7. Click the **OK** button at the bottom of the **Project Properties dialog box**.

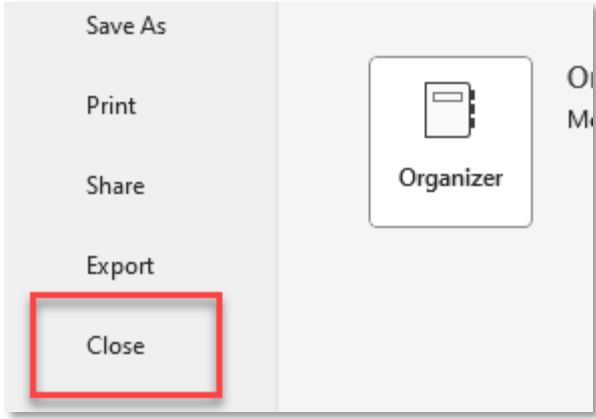
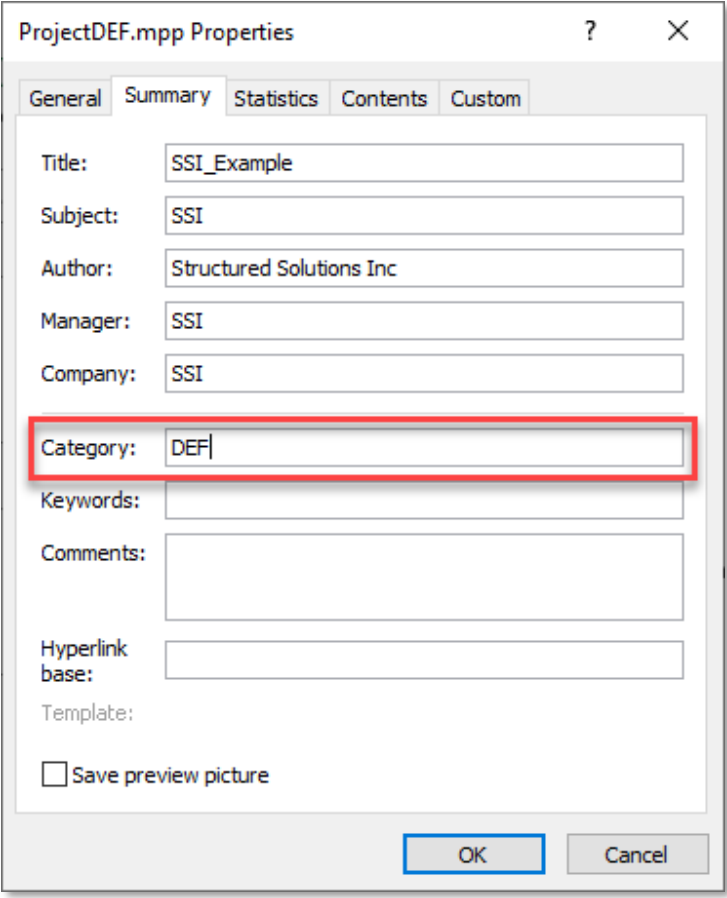


The image shows the 'ProjectABC.mpp Properties' dialog box with the 'Summary' tab selected. The 'Category' field contains 'ABC'. The 'OK' button is highlighted with a red box. The 'Cancel' button is also visible.

8. Back in the **Backstage** view, click the **Save** button.

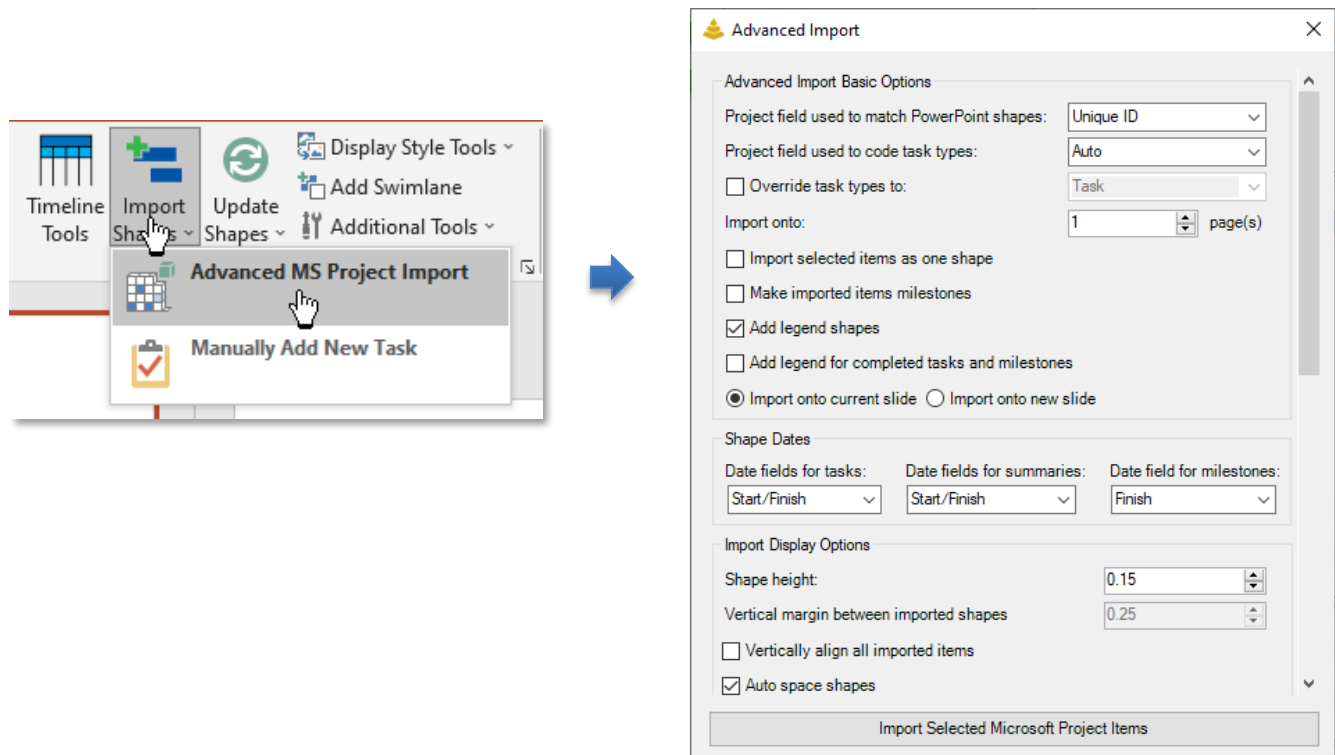


The image shows the 'Backstage' view with the 'Info' tab selected. The 'Save' button is highlighted with a red box. A red arrow points from the 'Save' button to the 'Manage Accounts' button.

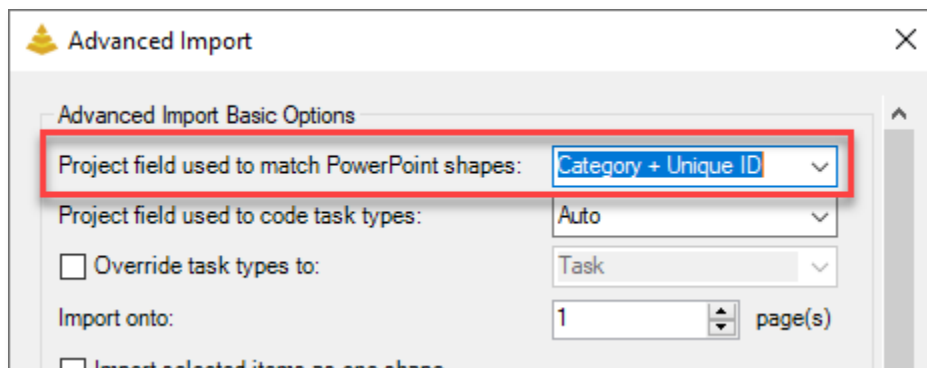
9. Close ProjectABC by clicking the Close button in the Backstage view.	
10. Open ProjectDEF in Microsoft Project	
11. Repeat steps 3-8 of this exercise but use "DEF" as the category for ProjectDEF.	
End of Practice Exercise	

Coding Activities with “Category + Unique ID” on Import

You can have Presentation Pro import activities from multiple Microsoft Project files and code their Unique ID *and* Project’s Category value by using the **Advanced Import form**. You can open the **Advanced Import form** by clicking the lower half of the **Import Shapes** button in the **Timelines and Tasks group** of the **SSI Presentation Pro ribbon**, then choose the **Advanced MS Project Import** option:

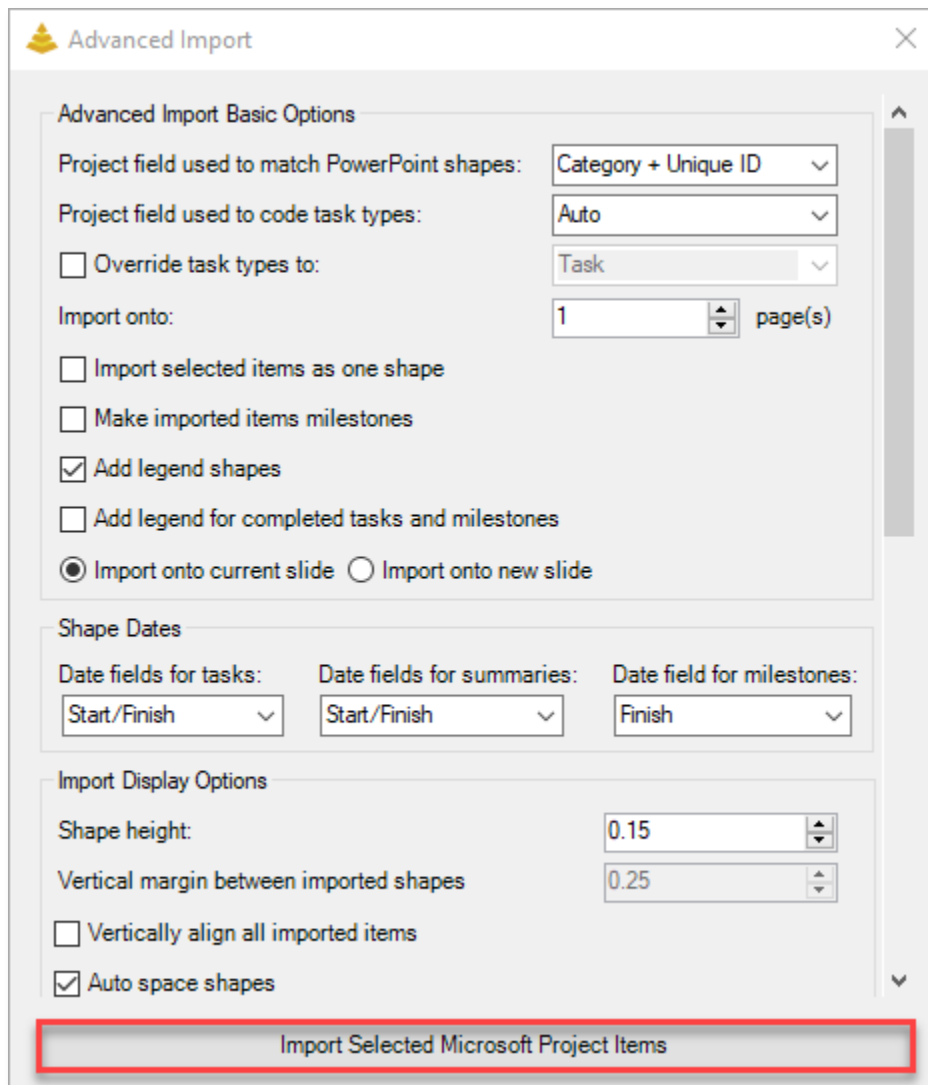


Once the **Advanced Import form** is open, set the **Project Field to match PowerPoint Shapes** to the “Category + Unique ID” option.



This will instruct Presentation Pro to code the Project's *Category* and unique ID values of activities when they are imported.

Select activities in a Microsoft Project file that has a *Category* set. When you are ready to import them into a chart, click the **Import Selected Microsoft Project Items** button at the bottom of the **Advanced Import** form.



Repeat this process to import activities from other project files onto the same chart.

NOTE: If the Project file of the activities being imported does *not* have a category set, this option will be ignored, and only unique ID values will be coded to the imported activities.

Class Exercise – Importing Activities from More than one Project on a Single Chart

Start of Practice Exercise

1. Open ProjectABC.mpp from the previous exercise in Microsoft Project.



2. Select task rows 3 thru 12 in the Project as shown on the image to the right →

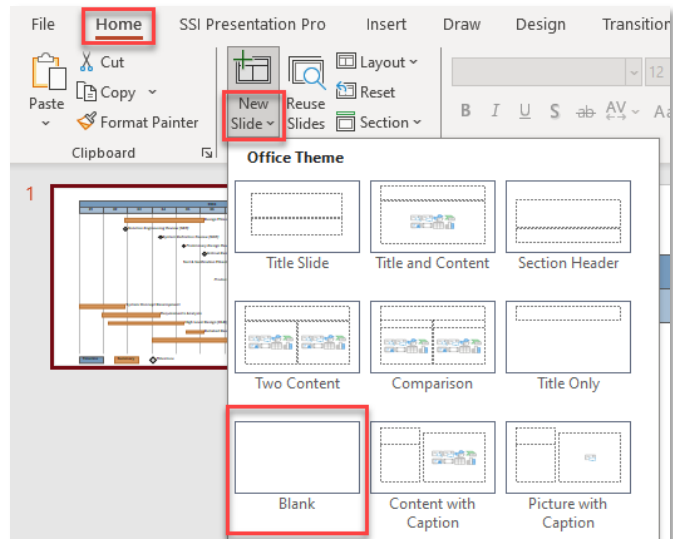
ProjectABC.mpp

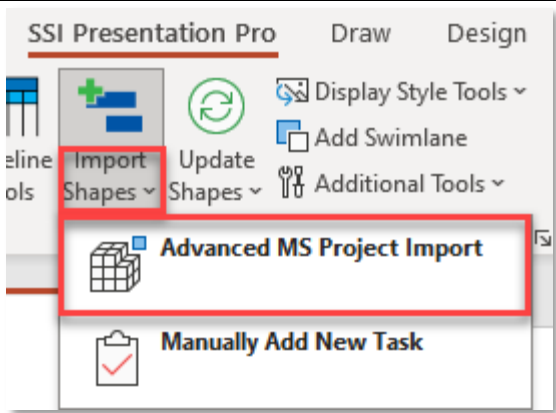
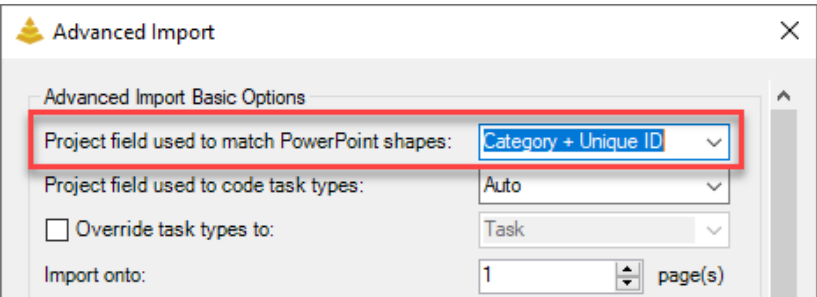
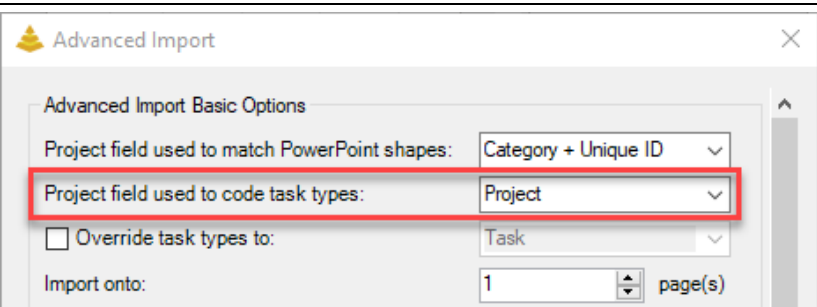
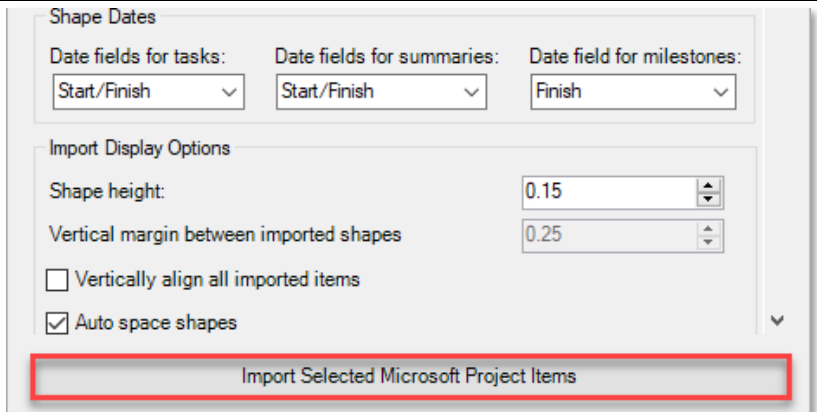
	Name
3	Design Milestones
4	Solution Engineering Review (SER)
5	System Definition Review (SDR)
6	Preliminary Design Review (PDR)
7	Critical Design Review (CDR)
8	Test & Verification Milestones
9	Test Readiness Review (TRR)
10	Production Readiness Review (PRR)
11	Operational Readiness Review (ORR)
12	Receive Authority to Operate (ATO)

3. Open a Presentation in PowerPoint

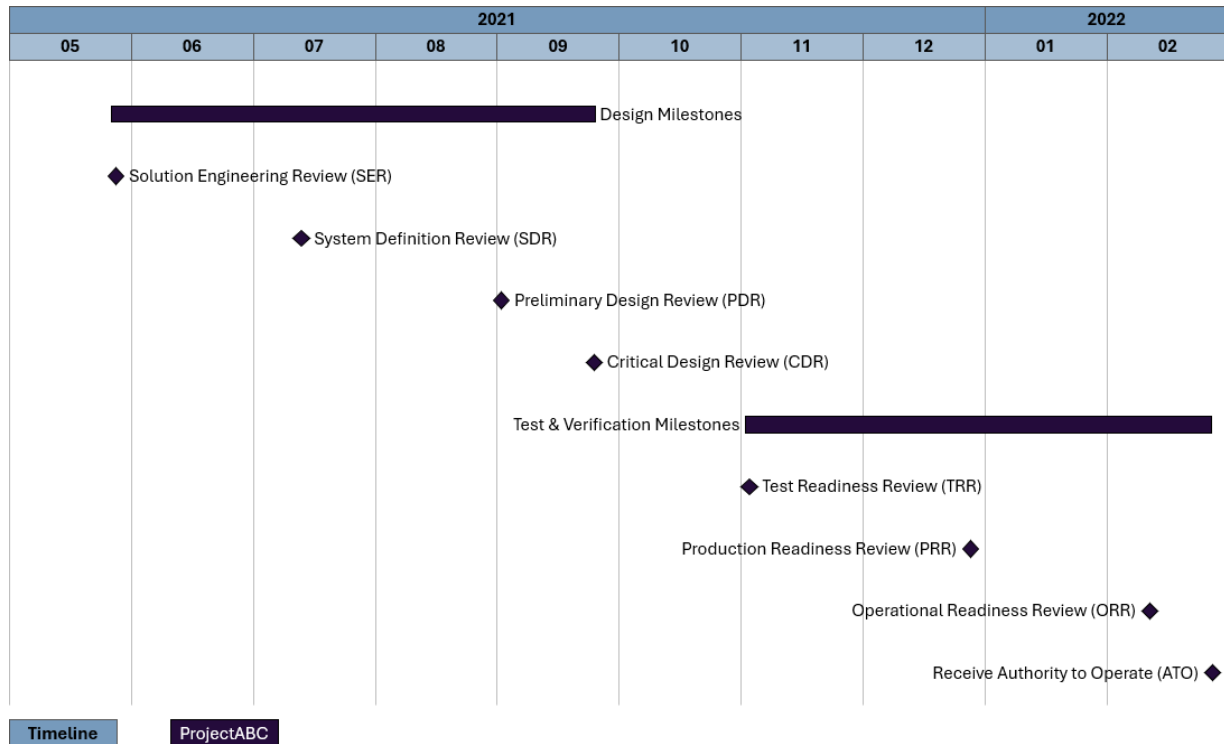


4. Add a new blank slide to the Presentation



5. In the <i>SSi Presentation Pro Ribbon</i>, click the lower half of the <i>Import Shapes</i> button and select the <i>Advanced MS Project Import</i> option to open the <i>Advanced Import form</i>.	
6. In the <i>Advanced Import form</i>, set the Project Field to match PowerPoint Shapes to the "Category + Unique ID" option.	
7. Set the Project Field used to code task types to "Project"	
8. Click <i>the Import Selected Microsoft Project Items</i> button at the bottom of the <i>Advanced Import form</i>.	

9. Observe the chart created (your chart may be a different color):



10. Open ProjectDEF.mpp from the previous exercise in Microsoft Project.



11. Select task rows 3 thru 12 in the Project as shown on the image to the right →

ProjectABC.mpp

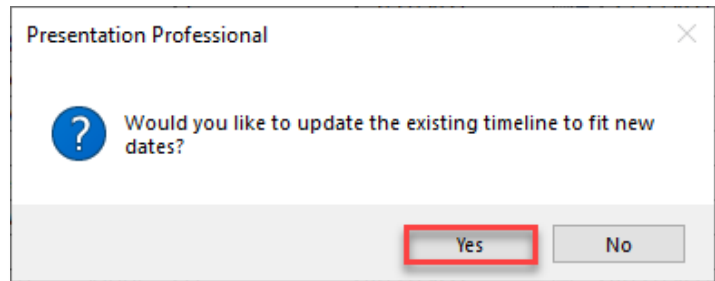
	Name
3	Design Milestones
4	Solution Engineering Review (SER)
5	System Definition Review (SDR)
6	Preliminary Design Review (PDR)
7	Critical Design Review (CDR)
8	Test & Verification Milestones
9	Test Readiness Review (TRR)
10	Production Readiness Review (PRR)
11	Operational Readiness Review (ORR)
12	Receive Authority to Operate (ATO)

12. Go back to the same chart you imported activities from Project ABC on in PowerPoint.

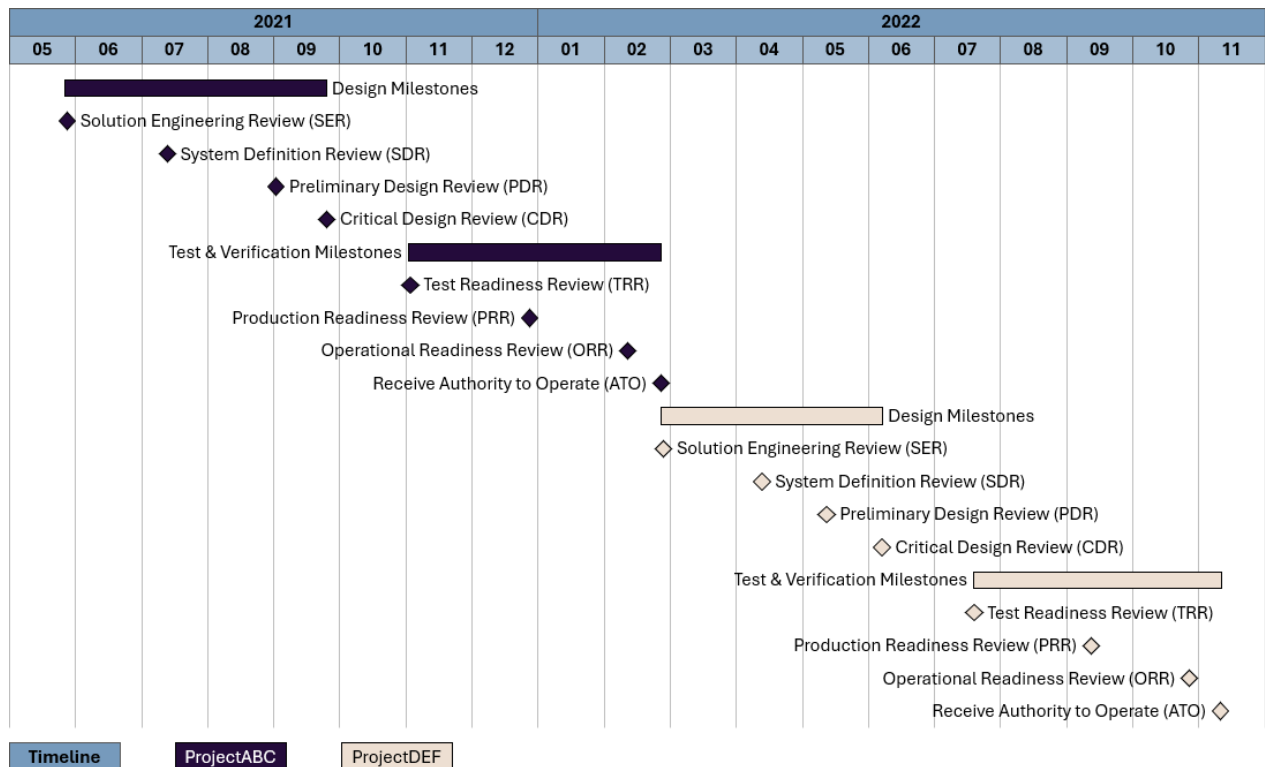


13. While on that same slide, repeat steps 5-8 of this exercise.

14. A message will appear asking if you would like to update the existing timeline to fit new dates. Click **Yes**.



15. Observe the chart created (your chart may be different colors):



End of Practice Exercise

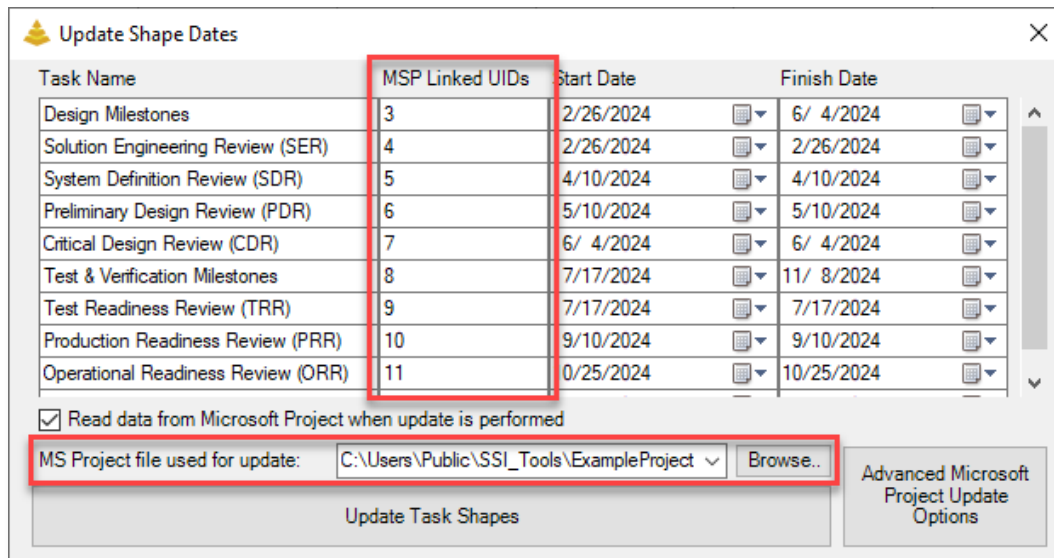
Updating a Chart with Activities marked with Unique IDs and Project Categories

A Presentation Pro chart created with activities mapped to both their Unique ID(s) and their Project's Category on the surface may appear no different to a chart created in the usual way, where activities are only mapped to their Microsoft Project Unique IDs. The crucial difference becomes apparent when updating the chart.

Updating a Multi-Project Chart with the Updater Form

The difference between a standard and multi-project chart can be seen very clearly when you open the *Updater form*. Observe the following images:

Standard Updater Form:



The 'Update Shape Dates' form displays a table of tasks with their corresponding MSP Linked IDs, Start Dates, and Finish Dates. The 'MSP Linked IDs' column is highlighted with a red box. Below the table, there is a checkbox for 'Read data from Microsoft Project when update is performed' and a text field for 'MS Project file used for update:' with a 'Browse...' button. The 'Update Task Shapes' button is at the bottom.

Task Name	MSP Linked IDs	Start Date	Finish Date
Design Milestones	3	2/26/2024	6/ 4/2024
Solution Engineering Review (SER)	4	2/26/2024	2/26/2024
System Definition Review (SDR)	5	4/10/2024	4/10/2024
Preliminary Design Review (PDR)	6	5/10/2024	5/10/2024
Critical Design Review (CDR)	7	6/ 4/2024	6/ 4/2024
Test & Verification Milestones	8	7/17/2024	11/ 8/2024
Test Readiness Review (TRR)	9	7/17/2024	7/17/2024
Production Readiness Review (PRR)	10	9/10/2024	9/10/2024
Operational Readiness Review (ORR)	11	0/25/2024	10/25/2024

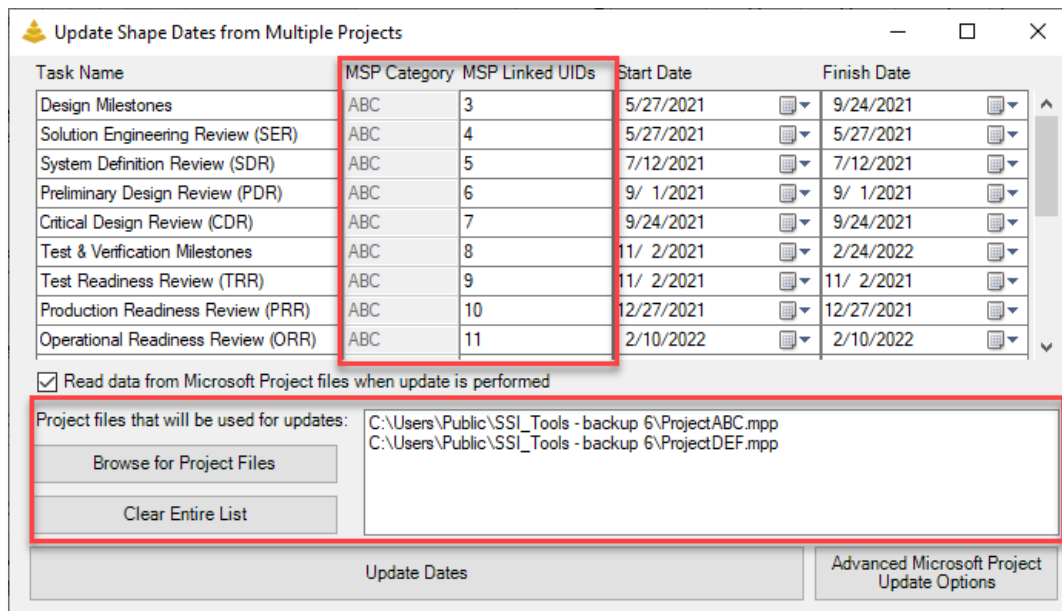
☒ Read data from Microsoft Project when update is performed

MS Project file used for update: C:\Users\Public\SSI_Tools\ExampleProject \ Browse..

Update Task Shapes

Advanced Microsoft Project Update Options

Multi-Project Updater Form:



The 'Update Shape Dates from Multiple Projects' form displays a table of tasks with their corresponding MSP Category, MSP Linked IDs, Start Dates, and Finish Dates. The 'MSP Category' and 'MSP Linked IDs' columns are highlighted with a red box. Below the table, there is a checkbox for 'Read data from Microsoft Project files when update is performed' and a text field for 'Project files that will be used for updates:' with a 'Browse for Project Files' button and a 'Clear Entire List' button. The 'Update Dates' button is at the bottom.

Task Name	MSP Category	MSP Linked IDs	Start Date	Finish Date
Design Milestones	ABC	3	5/27/2021	9/24/2021
Solution Engineering Review (SER)	ABC	4	5/27/2021	5/27/2021
System Definition Review (SDR)	ABC	5	7/12/2021	7/12/2021
Preliminary Design Review (PDR)	ABC	6	9/ 1/2021	9/ 1/2021
Critical Design Review (CDR)	ABC	7	9/24/2021	9/24/2021
Test & Verification Milestones	ABC	8	11/ 2/2021	2/24/2022
Test Readiness Review (TRR)	ABC	9	11/ 2/2021	11/ 2/2021
Production Readiness Review (PRR)	ABC	10	12/27/2021	12/27/2021
Operational Readiness Review (ORR)	ABC	11	2/10/2022	2/10/2022

☒ Read data from Microsoft Project files when update is performed

Project files that will be used for updates: C:\Users\Public\SSI_Tools - backup 6\ProjectABC.mpp
C:\Users\Public\SSI_Tools - backup 6\ProjectDEF.mpp

Browse for Project Files

Clear Entire List

Update Dates

Advanced Microsoft Project Update Options

As demonstrated by the two forms, Presentation Pro can detect when a chart contains activities mapped to both their Unique IDs and their Project's Category. In such cases, it automatically switches the display from the Standard Updater form to the Multi-Project Updater form to accommodate the additional complexity.

Differences Between the "Standard" and "Multi-Project" Updater Forms

General:

- **Standard Updater:** This form is designed for use with a single project file, as indicated by the "MS Project file used for update" field at the bottom.
- **Multi-Project Updater** This form is intended for updating task shapes that pull data from multiple Microsoft Project files.

MSP Category:

- **Standard Updater:** This view does not include an MSP Category column, as it assumes all tasks are from a single project file.
- **Multi-Project Updater:** The MSP Category column is present and essential. It identifies the category (or source project) for each task, enabling the form to update dates based on specific projects. This is crucial when dealing with multiple projects that might have tasks with the same UID but different categories.

MSP Category	MSP Linked UIDs
ABC	3
ABC	4
ABC	5
ABC	6
ABC	7
ABC	8
ABC	9
ABC	10

Project File Selection:

- **Standard Updater:** The form has a field at the bottom labeled "MS Project file used for update," where you specify the single project file from which data will be pulled.

MS Project file used for update:

- **Multi-Project Updater:** Instead of a single file field, this view provides a section labeled "Project files that will be used for updates." You can browse for multiple project files and add them to a list, allowing the updater to pull data from several sources.

Project files that will be used for updates:

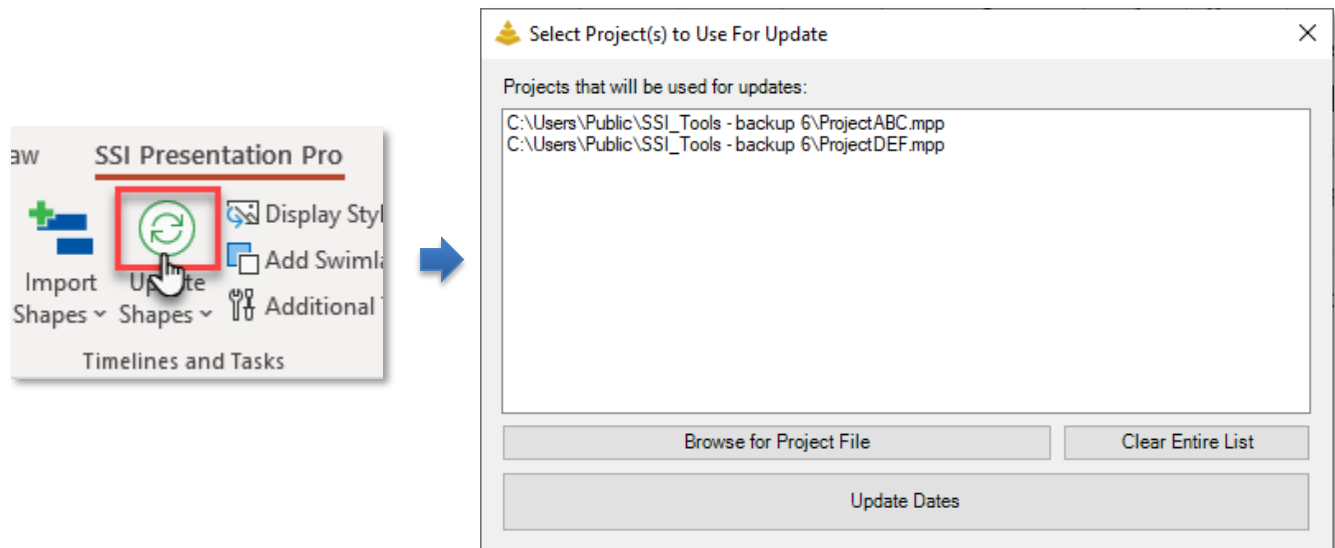
C:\Users\Public\SSi_Tools - backup 6\ProjectABC.mpp
C:\Users\Public\SSi_Tools - backup 6\ProjectDEF.mpp

Update Process:

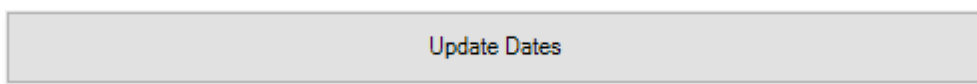
- **Standard Updater:** The update process is straightforward; it pulls data from one specified project file and updates the shapes based on the UIDs.
- **Multi-Project Updater:** The update process here is more complex. Presentation Pro needs to cross-reference both the MSP Linked UIDs and the MSP Category with the appropriate project files to ensure the correct dates are used for each task. The presence of multiple projects requires careful handling to avoid mismatches.

Updating a Multi-Project Chart with the Easy Update Button

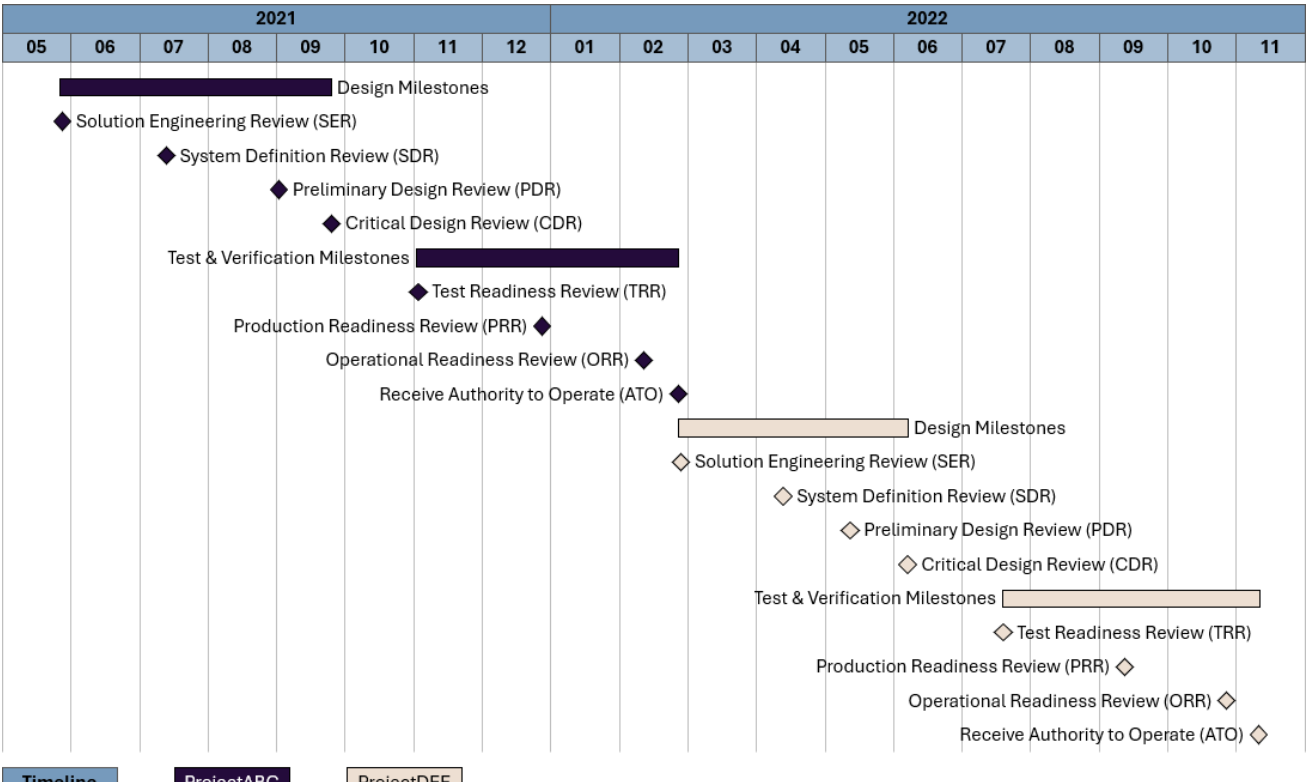
When you click the top half of the **Update Shapes** button in the **Timelines and Tasks** group of the **SSi Presentation Pro ribbon** while on a slide containing activities mapped *only* to their Unique ID values, Presentation Pro will update those activities using data from the currently active Microsoft Project file. The process is straightforward, pulling data from the active project file and updating the shapes based on their UIDs. However, if the chart includes activities mapped to *both* Unique IDs *and* **Project Categories**, clicking the top half of the **Update Shapes** button will automatically open the **Simple Multi-Project Updater** form, allowing you to browse and select the Project files associated with those activities.



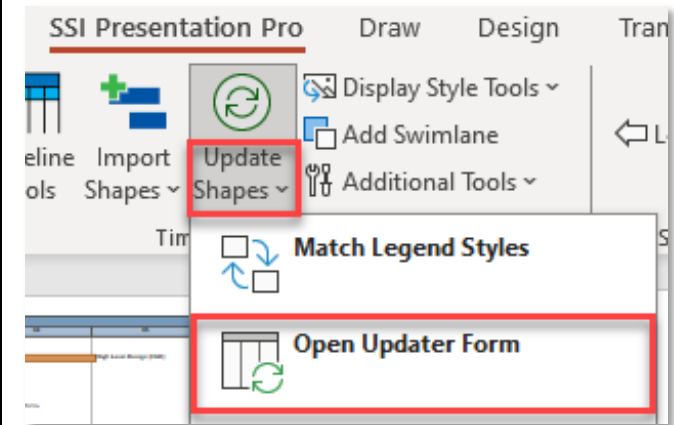
Once you have browsed to the project files desired to use for the update on either the **Advanced** or **Simple Multi-Project Updater forms**, you can click the **Update Dates** button to synchronize activities on the chart with the dates from their respective projects.



Class Exercise – Updating a Multi-Project Chart

Start of Practice Exercise											
1. Open ProjectABC.mpp from the previous exercise in Microsoft Project.											
2. Assign a <i>Start-No-Earlier-Than</i> constraint on System Definition Review (row 5) for September 1st, 2021. Do this by inserting the <i>Constraint Date</i> column in the Gantt table and entering the date.											
<table border="1" style="margin: auto; border-collapse: collapse;"> <thead> <tr style="background-color: #d3d3d3;"> <th></th> <th>Name</th> <th>Constraint Date</th> <th>Start</th> <th>Finish</th> </tr> </thead> <tbody> <tr> <td style="text-align: center;">5</td> <td>System Definition Review (SDR)</td> <td style="border: 2px solid red;">9/1/21</td> <td>9/1/21</td> <td>9/1/21</td> </tr> </tbody> </table>			Name	Constraint Date	Start	Finish	5	System Definition Review (SDR)	9/1/21	9/1/21	9/1/21
	Name	Constraint Date	Start	Finish							
5	System Definition Review (SDR)	9/1/21	9/1/21	9/1/21							
3. Return to the PowerPoint presentation used in the previous exercise											
4. Return to the chart created in the previous exercise:											
											

5. While on that slide, open the **Updater form** by clicking the lower half of the **Update Shapes** button and selecting the **Open Updater Form** option from the menu.



6. Observe the updater form opened is in the Multi-Project view, and contains a column titled "MSP Category" in the table:

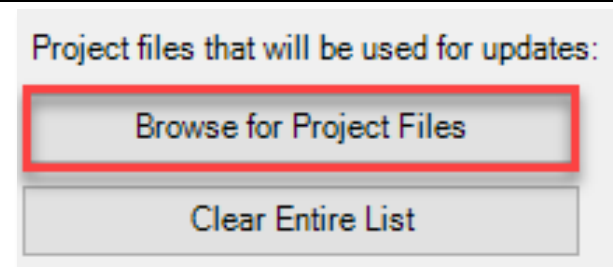
Update Shape Dates from Multiple Projects

Task Name	MSP Category	MSP Linked UIDs	Start Date	Finish Date
Design Milestones	ABC	3	5/27/2021	9/24/2021
Solution Engineering Review (SER)	ABC	4	5/27/2021	5/27/2021
System Definition Review (SDR)	ABC	5	7/12/2021	7/12/2021
Preliminary Design Review (PDR)	ABC	6	9/ 1/2021	9/ 1/2021
Critical Design Review (CDR)	ABC	7	9/24/2021	9/24/2021
Test & Verification Milestones	ABC	8	11/ 2/2021	2/24/2022
Test Readiness Review (TRR)	ABC	9	11/ 2/2021	11/ 2/2021
Production Readiness Review (PRR)	ABC	10	12/27/2021	12/27/2021
Operational Readiness Review (ORR)	ABC	11	2/10/2022	2/10/2022

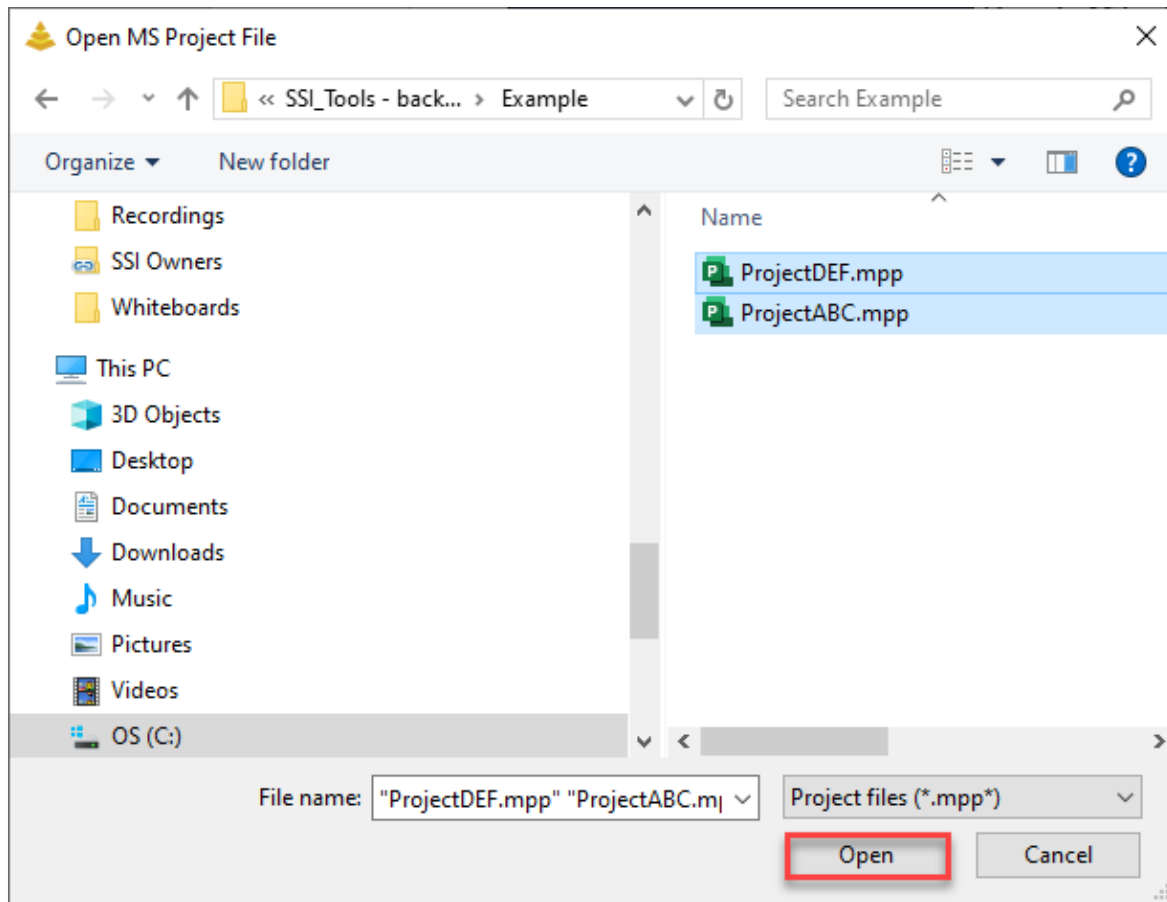
☒ Read data from Microsoft Project files when update is performed

Project files that will be used for updates:

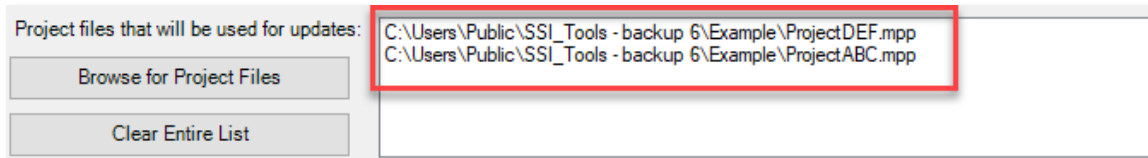
7. Click the **Browse for Project Files** button on the lower left side of the form.



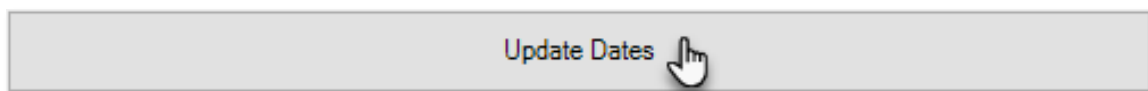
8. Use the file explorer that opens to browse for *ProjectABC.mpp* and *ProjectDEF.mpp* where ever you saved them. Click the **Open** button to add them to the project list.



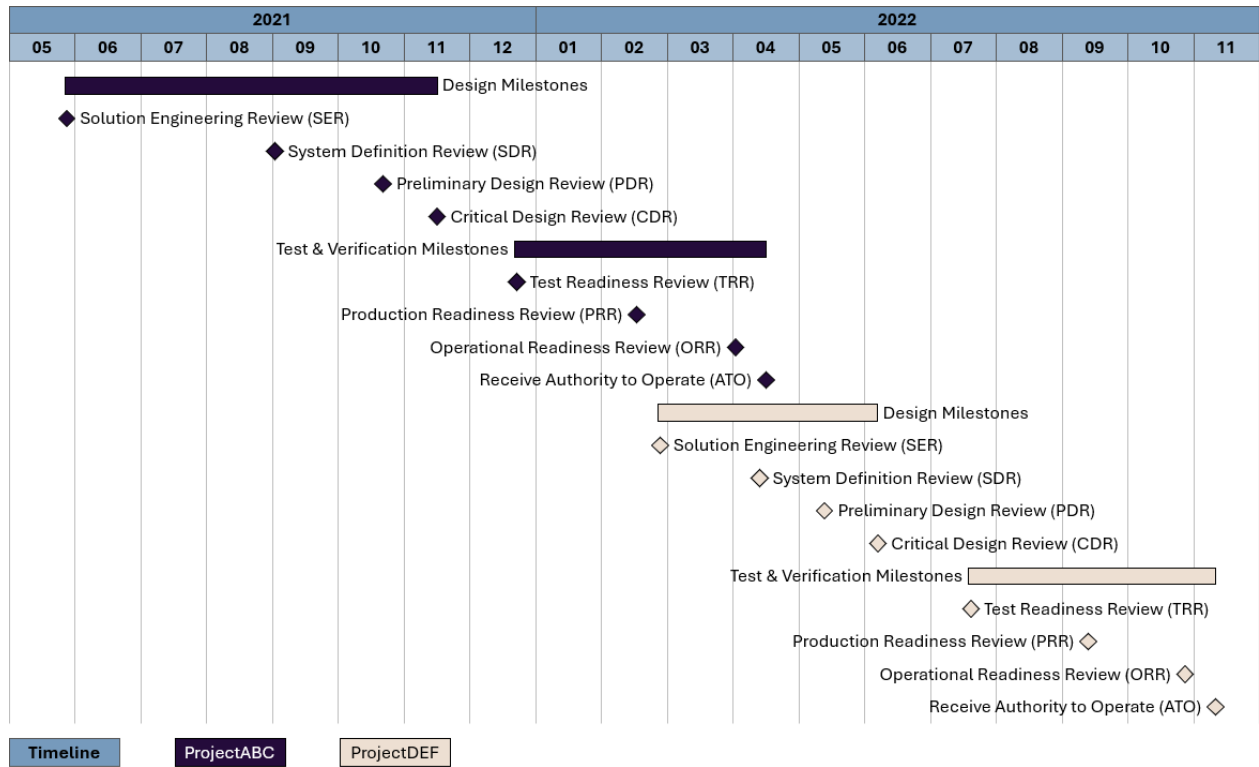
9. Verify both *ProjectABC.mpp* and *ProjectDEF.mpp* have been added to the list of Project files that will be used for updates (Note: the file paths shown on the image below will differ from what you see):



10. Click the **Update Dates** button at the bottom of the *Updater form*.



11. Observe how the chart has been updated, and ProjectABC's activities moved to their appropriate dates, while ProjectDEF's activities stayed in place:



End of Practice Exercise