



Contents

SSI Presentation Pro – Creating Reference Shapes.....	2
Overview.....	2
Creating Reference Shapes	3
Setting the Default Settings of Reference Shapes.....	4
Adding Reference Shapes on Import.....	9
Additional Notes:.....	12
Class Exercise – Adding Reference Shapes on Import.....	14
Adding Reference Shapes on Update	17
Additional Notes:.....	20
Class Exercise – Adding Reference Shapes on Update	21
Using different date fields for activities.....	26
Changing the Date Fields for Activities on Import.....	27
Class Exercise – Changing the Date Fields for Activities on Import	30
Changing the Date Fields for Activities on Update	33
Class Exercise – Changing the Date Fields for Activities on Import	36

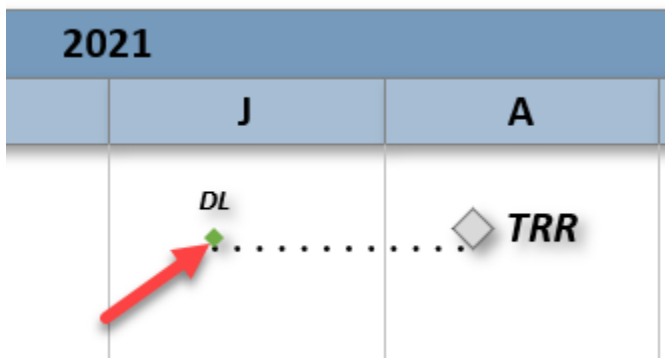


Creating Reference Shapes

A **Reference Shape** is a shape that is connected to a parent activity shape that displays additional data relevant to that activity, such as a task's baseline start/finish dates or a milestone's deadline dates. Observe the following images:



In the image above you can see where the task **Develop Test Case Specifications** is relative to its baseline, shown by the smaller, yellow *baseline reference task*.



In the image above you can see where the milestone **TRR** is relative to its deadline, shown by the smaller, green *deadline reference milestone* a dotted line connects the two shapes for clarity.

Tasks and Summaries can display reference shapes for their baseline dates or any other custom Start/Finish fields from Microsoft Project. Milestones can include reference shapes for their baseline, deadline, or any other custom start, finish, or date field from Microsoft Project.

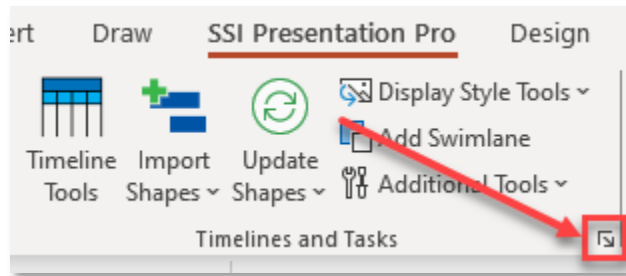
Reference shapes can be added to Presentation Pro charts when content is imported from Microsoft Project *or* after the fact, providing you with the flexibility to include reference shapes while initially building the chart or to add them later if needed.



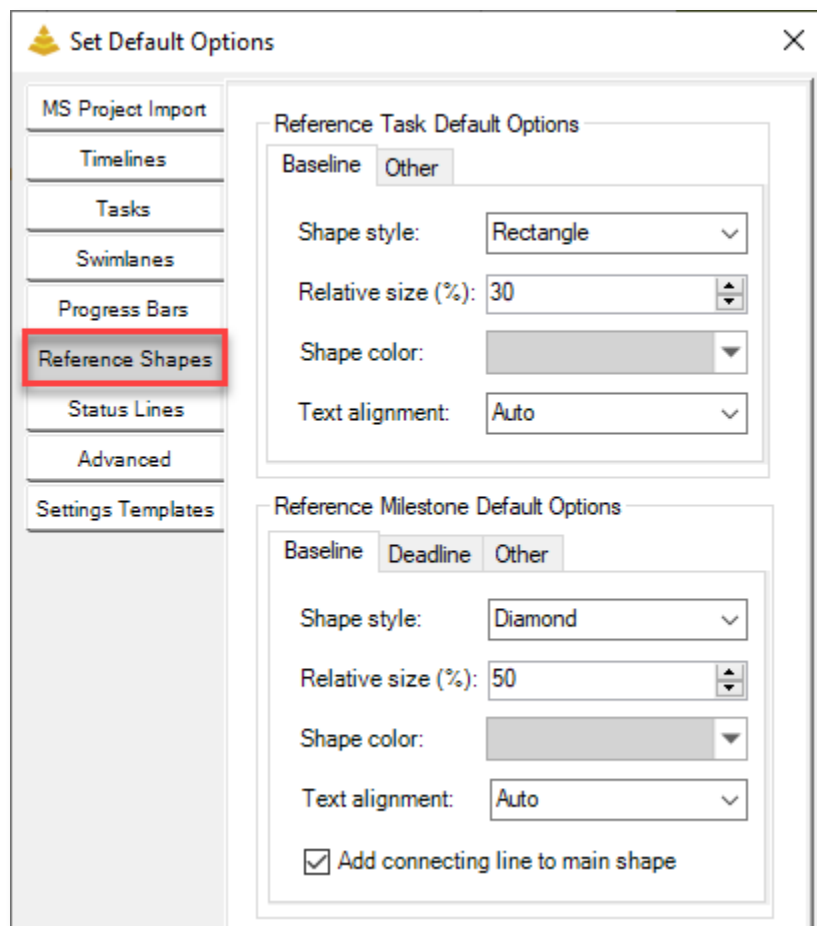
Setting the Default Settings of Reference Shapes

When you add reference shapes to a chart, they adhere to the default settings saved in the *Presentation Pro Default Options form*. To ensure they match your preferences, it's recommended to adjust the default settings to your liking before adding progress bars to your chart.

To open the *Presentation Pro Default Options form*, click the button in the bottom right corner of the *Timeline and Tasks group* of the *SSI Presentation Pro Ribbon*.



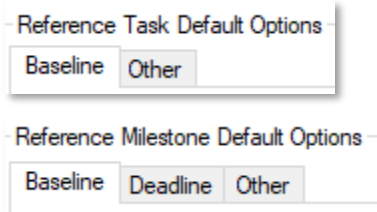
To edit the default settings of reference shapes, navigate to the *References Shapes* tab on the *Presentation Pro Default Options form*.





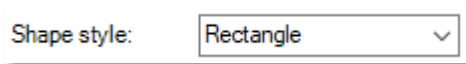
The top group of the Reference Shapes tab controls the default settings for *reference task shapes* that are connected to *Tasks* and *Summaries* on a chart. The bottom group controls options for *reference milestone shapes* that are connected to Milestones on a chart.

Top Tabs



The tab at the top of the **Reference Task** or **Reference Milestone Default Options** group will indicate which type of reference shape is being adjusted. For example, to adjust the default options for the **Baseline Reference Task** shape, ensure that the top tab in the **Reference Task Default Options** is set to **Baseline**. The **Other** tab lets you configure the default settings for reference shapes associated with other custom date fields from Microsoft Project.

Shape Style



This dropdown menu allows you to select the geometric shape style for the reference shapes.

The options for *reference tasks* are:

- Rectangle:
- Rounded Rectangle:

The options for reference milestones are:

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

Relative Size (%)



This field determines the size of the reference shape as a percentage of the main task shape. Adjusting this value will scale the reference shape proportionally to the main task shape, ensuring that it maintains visual distinction to the main shape on the chart.



Shape Color

Shape color:

This dropdown allows you to select the default fill color for the reference shapes. Clicking the dropdown opens a color picker, enabling you to choose your desired color.

Text Alignment

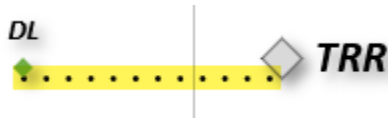
Text alignment:

This dropdown lets you determine the alignment of the text within the reference shape. The "Auto" setting automatically places the text in an optimal position for readability, but you can choose another alignment option if desired.

Add Connecting Line

☒ Add connecting line to main shape

This option is only available for *reference milestone* shapes. Choose this option to add a dotted line that connects the reference milestone to its parent milestone. See the image below:



In this example, the dotted line (highlighted yellow) is the connecting line this option is referring to.

Saving Reference Shape Settings

Once you have adjusted the reference shape settings to your liking, click the **Save Settings** button at the bottom of the *Presentation Pro Default Options form*.

Shape style:

Relative size (%):

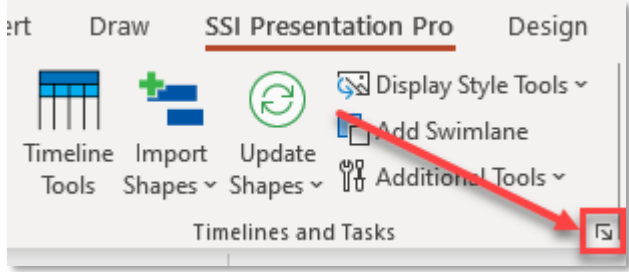
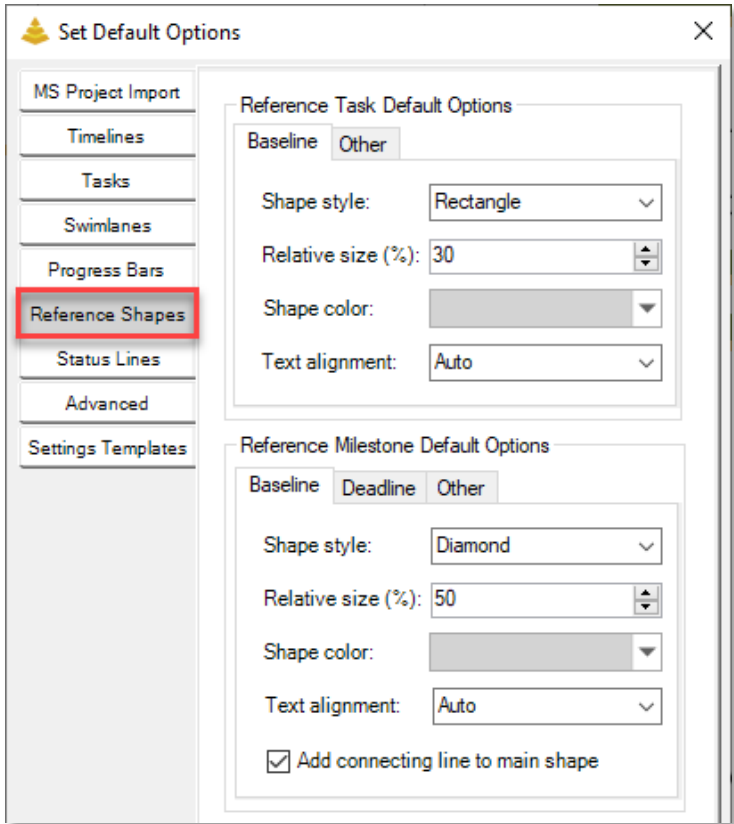
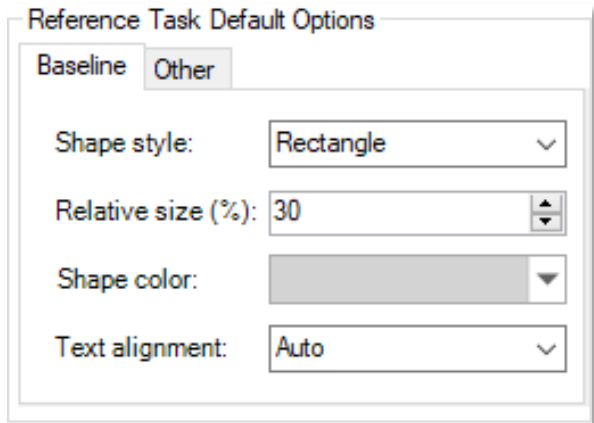
Shape color:

Text alignment:

☒ Add connecting line to main shape

Save Settings

**Class Exercise – Adjusting Reference Shapes Default Settings**

Start of Practice Exercise	
1. In PowerPoint, open the Presentation Pro Default Options form by clicking the button in the bottom right corner of the Timelines and Tasks group in the SSI Presentation Pro Ribbon .	
2. Click the Reference Shapes tab on the Presentation Pro Default Options form to navigate to the progress bar default options.	
3. Adjust the controls in Reference Task Default Options group to your liking. SSI recommends keeping the relative size below 50%	



4. Adjust the controls in the **Reference Milestone Default Options group** to your liking. SSI recommends keeping the relative size above 50%.

Reference Milestone Default Options

Baseline Deadline Other

Shape style: Diamond

Relative size (%): 50

Shape color: [Color Picker]

Text alignment: Auto

☒ Add connecting line to main shape

5. Once you have finished adjusting the Reference shape options, click the **Save Settings** button at the bottom of the **Presentation Pro Default Options form**.

Set Default Options

MS Project Import

Timelines

Tasks

Swimlanes

Progress Bars

Reference Shapes

Status Lines

Advanced

Settings Templates

Reference Task Default Options

Baseline Other

Shape style: Rectangle

Relative size (%): 30

Shape color: [Color Picker]

Text alignment: Auto

Reference Milestone Default Options

Baseline Deadline Other

Shape style: Diamond

Relative size (%): 50

Shape color: [Color Picker]

Text alignment: Auto

☒ Add connecting line to main shape

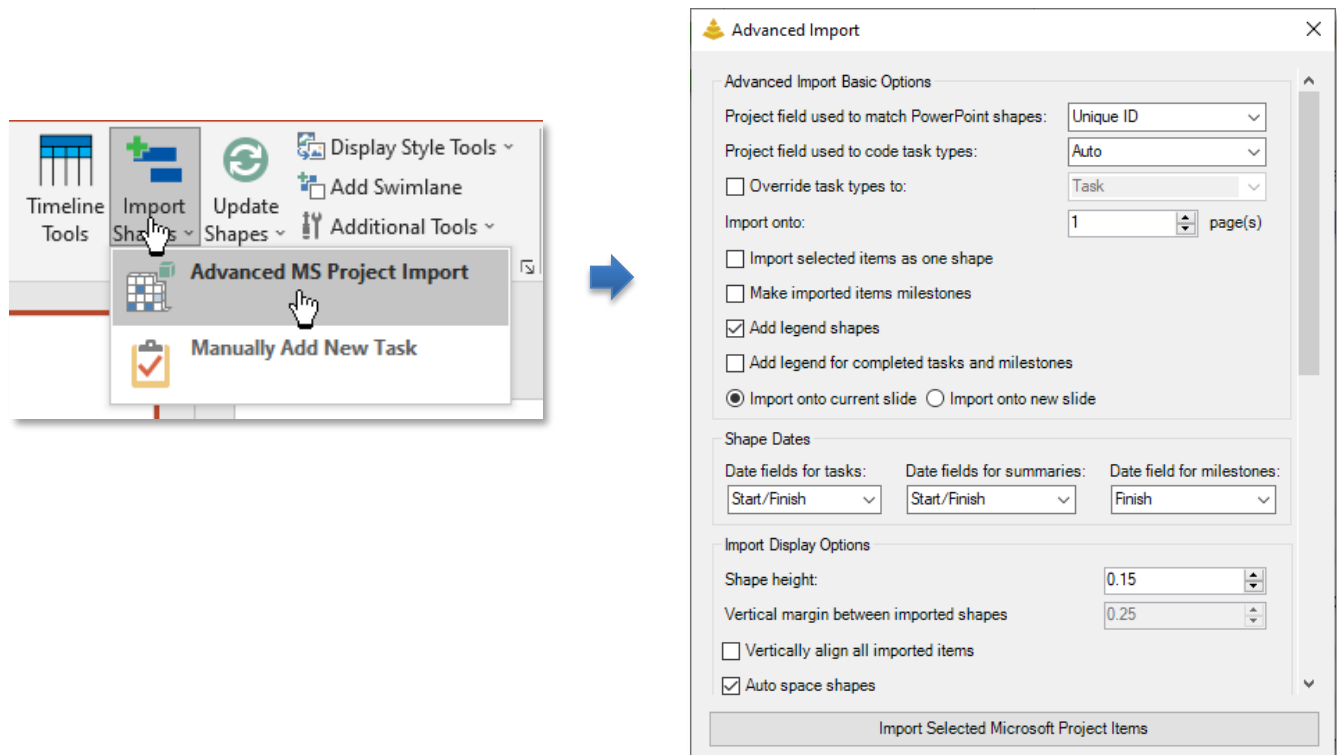
Save Settings Close

End of Practice Exercise

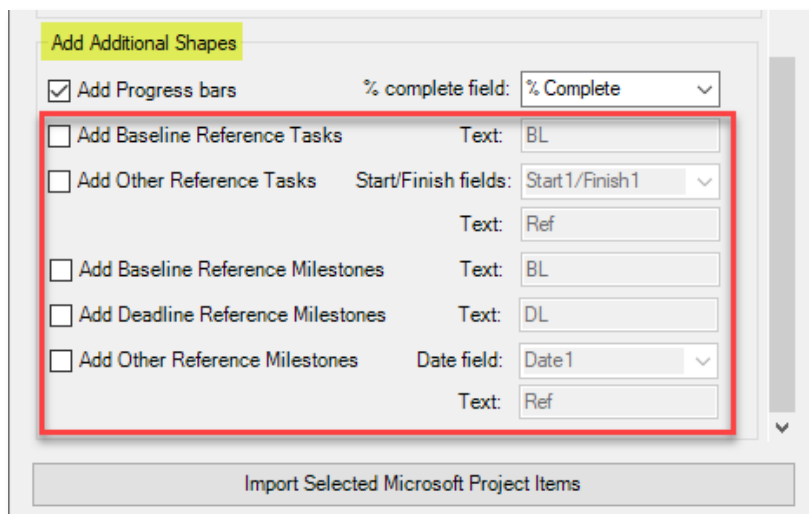


Adding Reference Shapes on Import

Reference Shapes can be added to activities when they are imported from Microsoft Project. To do this, 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:



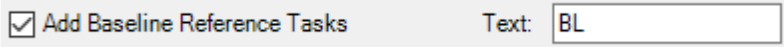
At the bottom of the form, you will find the options to add reference shapes in the **Add Additional Shapes group**.





The controls within this section allow you to include reference shapes when importing Microsoft Project items into your Presentation Pro chart. Below is an explanation of each option:

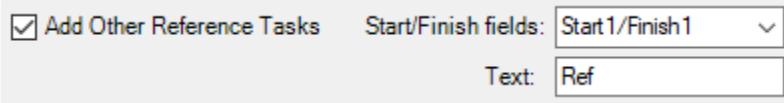
Add Baseline Reference Tasks



Checkbox: select this option to add reference tasks that display the baseline start and finish dates for tasks and summaries.

Text Field: Enter the text label you want to appear next to the baseline reference shapes. For example, "BL" might be used to indicate baseline dates. SSI recommends leaving this field blank if you intend to have a *legend* for baseline reference tasks on the slide.

Add Other Reference Tasks



Checkbox: Select this option to add reference shapes that display dates from other custom Start/Finish fields for tasks and summaries.

Start/Finish Fields Dropdown: Choose the specific Start and Finish fields from Microsoft Project that will be represented by the reference shapes.

Text Field: Enter the text label you want to appear next to these custom reference shapes. For example, "Ref" might be used to indicate a general reference date. SSI recommends leaving this field blank if you intend to have a *legend* for other reference tasks on the slide.

Add Baseline Reference Milestones



Checkbox: Select this option to add reference shapes that display the baseline finish date for milestones.

Text Field: Enter the text label you want to appear next to the baseline milestone reference shapes, such as "BL" for baseline. SSI recommends leaving this field blank if you intend to have a *legend* for baseline reference milestones on the slide.

**Add Deadline Reference Milestones**

☒ Add Deadline Reference Milestones	Text: DL
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Checkbox: Select this option to add reference shapes that display the deadline date for milestones.

Text Field: Enter the text label you want to appear next to the deadline reference shapes, such as "DL" for deadline. SSI recommends leaving this field blank if you intend to have a *legend* for deadline reference milestones on the slide.

Add Other Reference Milestones

☒ Add Other Reference Milestones	Date field: Date1
	Text: Ref

Checkbox: Select this option to add reference shapes that display dates from other custom date fields in Microsoft Project for milestones.

Date Field Dropdown: Choose the specific date field from Microsoft Project that will be represented by the reference shapes.

Text Field: Enter the text label you want to appear next to these custom milestone reference shapes, such as "Ref" for a general reference date. SSI recommends leaving this field blank if you intend to have a *legend* for other reference milestones on the slide.

**Additional Notes:**

While it's possible to connect multiple reference shapes to a single activity on your chart—for instance, a milestone can have both a deadline reference and a baseline reference—SSI recommends limiting the number of reference shapes on a single chart. Adding too many can make the chart appear cluttered and overwhelming for the audience to process.

Reference shapes will only be added for activities that have dates in the corresponding date fields. For example, if you choose to add Baseline Reference Tasks, these shapes will only appear on tasks or summaries that have baseline start and finish dates set in Microsoft Project.

Presentation Pro will automatically create **legends** for the reference shapes chosen to add on import if the **Add legend shapes** button is selected on the **Advanced Import Form**.

The screenshot shows the 'Advanced Import' dialog box with the following settings:

- Advanced Import Basic Options**
 - Project field used to match PowerPoint shapes: Unique ID
 - Project field used to code task types: Auto
 - ☐ Override task types to: Task
 - Import onto: 1 page(s)
 - ☐ Import selected items as one shape
 - ☐ Make imported items milestones
 - ☒ Add legend shapes
 - ☐ Add legend for completed tasks and milestones
 - ☒ Import onto current slide ☐ Import onto new slide
- Shape Dates**
 - Date fields for tasks: Start/Finish
 - Date fields for summaries: Start/Finish
 - Date field for milestones: Finish
- Import Display Options**
 - Shape height: 0.15
 - Vertical margin between imported shapes: 0.25
 - ☐ Vertically align all imported items
 - ☒ Auto space shapes

At the bottom is a button labeled 'Import Selected Microsoft Project Items'.

When you are satisfied with your selections, click the **Import Selected Microsoft Project Items** button to import the activities currently selected in the active Microsoft Project file onto the active slide in PowerPoint.



Add Additional Shapes

☐ Add Progress bars % complete field: % Complete

☒ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1

Text: Ref

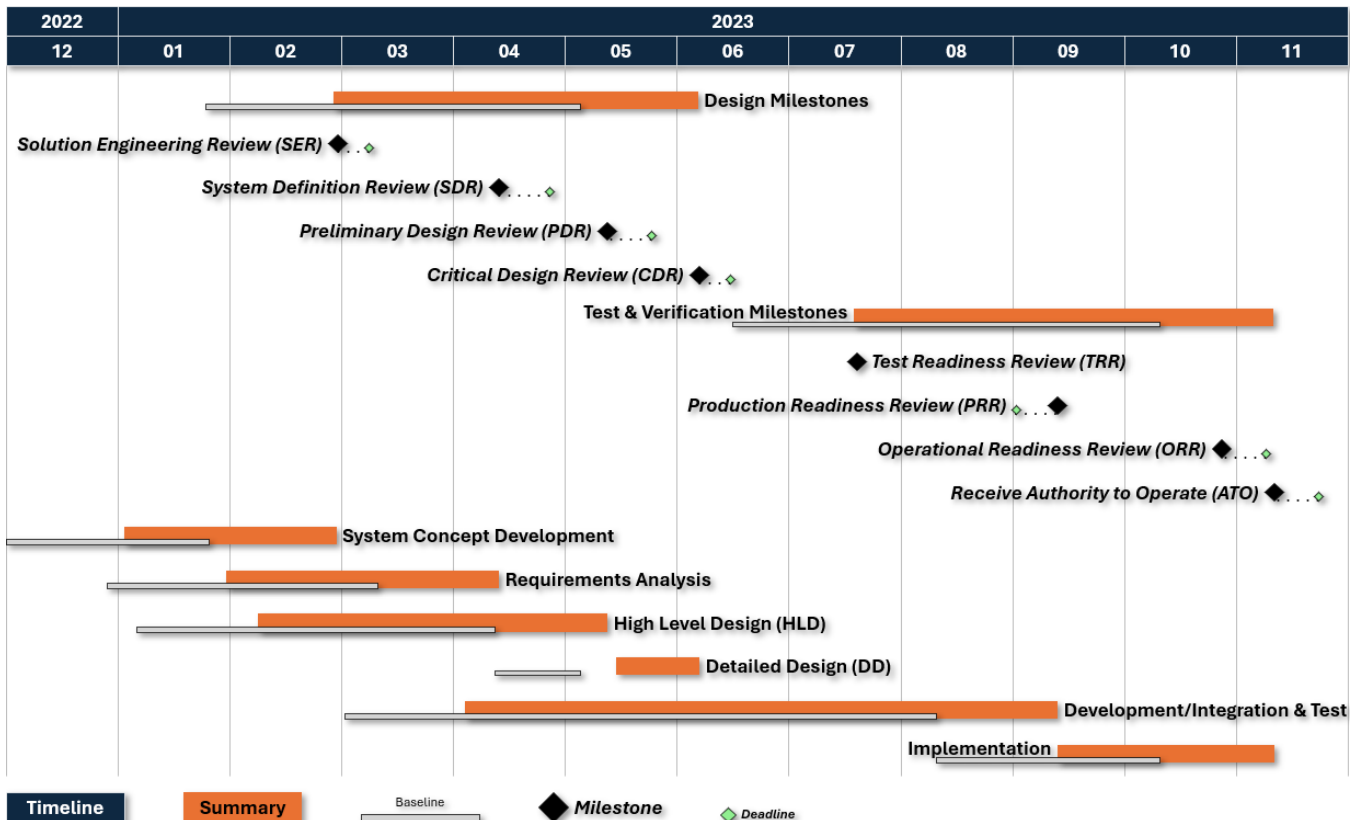
☐ Add Baseline Reference Milestones Text: BL

☒ Add Deadline Reference Milestones Text:

☐ Add Other Reference Milestones Date field: Date1

Text: Ref

Import Selected Microsoft Project Items

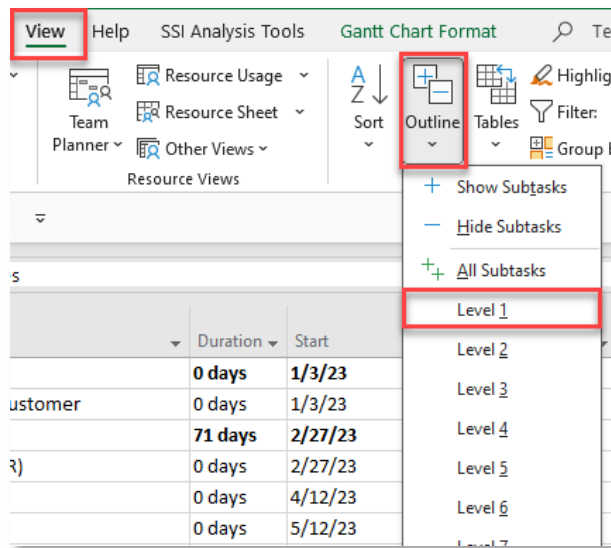




Class Exercise – Adding Reference Shapes on Import

Start of Practice Exercise

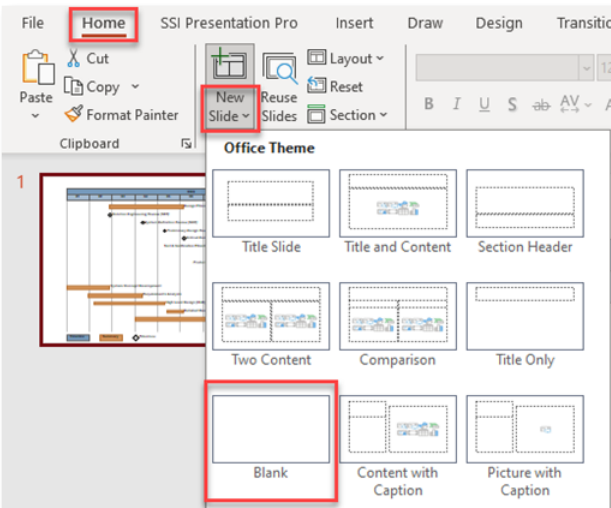
1. Open the [SSI Example Project file](#) in *Microsoft Project*. Set the outline to Level 1 by using the *Outline* menu on the *View Ribbon*



2. 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.

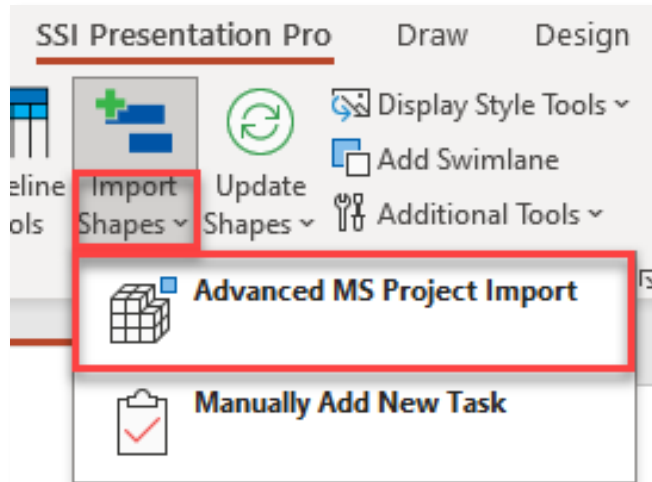


3. Open a presentation in *PowerPoint* and add a blank slide.





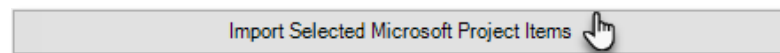
4. In the *SSI Presentation Pro Ribbon*, click the lower half of the *Import Shapes* button and select the *Advanced MS Project Import* option to open the *Advanced Import form*.



5. On the *Advanced Import form*, scroll down to the bottom and check the *Add Baseline Reference Tasks* and *Add Deadline Reference Milestones* options.

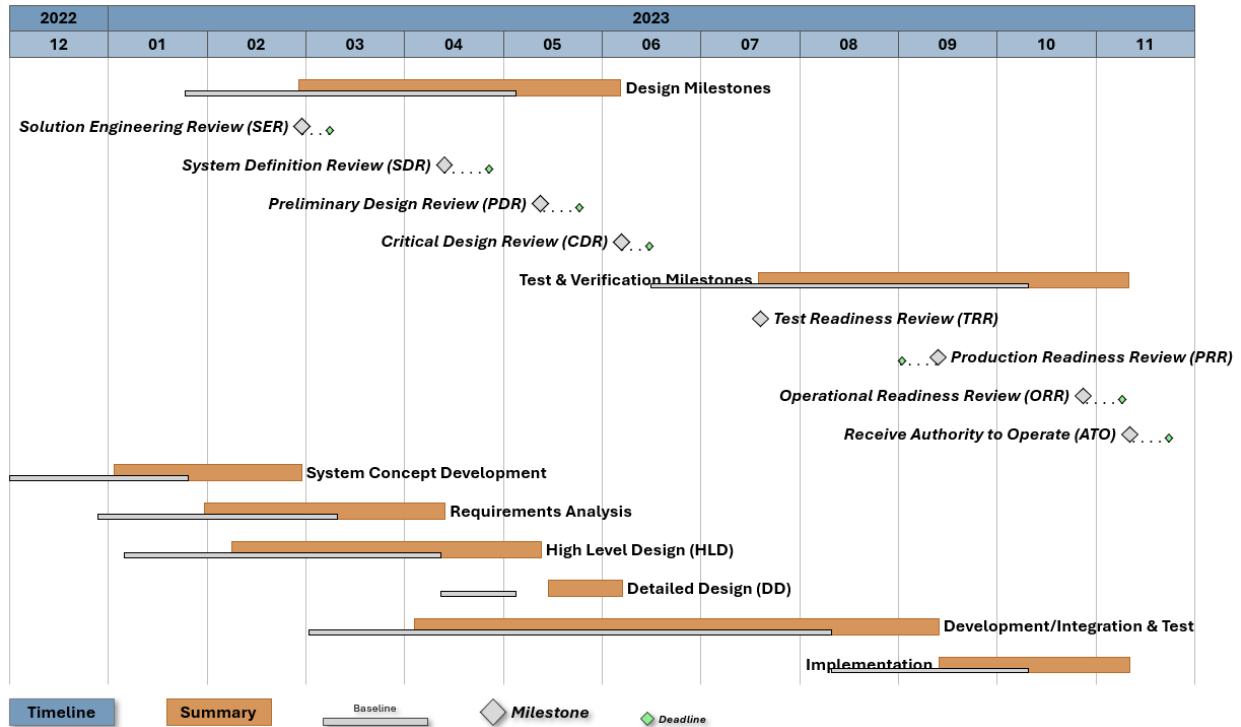
6. Set the *Text* for both options to be *blank*.

7. Click the *Import Selected Microsoft Project Items* button at the bottom of the form.

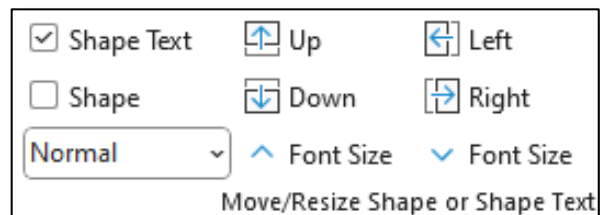
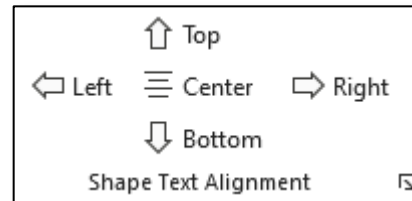




8. Observe the chart created:



9. Use the Tools in the *Shape Text Alignment group* or the *Move/Resize Shape or Shape Text group* in the *SSI Presentation Pro Ribbon* to move text on shapes as desired to present well to the audience.

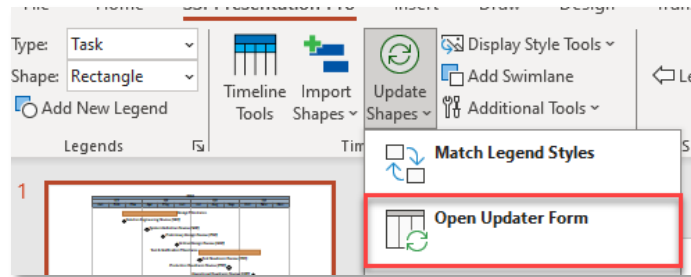


End of Practice Exercise



Adding Reference Shapes on Update

Reference Shapes can be added to activities *after* a chart has already been created by Presentation Pro by using the **Advanced Options** on the **Updater Form**.



Update Shape Dates

Task Name	MSP Linked UIDs	Start Date	Finish Date
Conduct User Surveys	34	2/28/2023	3/ 6/2023
Develop System Software Requirements	35	3/ 7/2023	3/13/2023
Develop Test and Evaluation Master Plan	39	2/28/2023	3/27/2023
Develop Requirements Traceability Matrix	37	3/14/2023	4/ 3/2023
Generate Developmental Test Plan (DTP)	40	3/28/2023	4/ 3/2023
Finalize Presentation Materials for SDR	50	4/ 4/2023	4/10/2023
Ensure SDR Exit Criteria Has Been Met	51	4/11/2023	4/11/2023
Conduct SDR	52	4/12/2023	4/12/2023
System Definition Review (SDR)	5	4/12/2023	4/12/2023

☒ 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

Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by: Auto

☐ Add task type legends if they do not exist

☐ Match legend styles on update

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☐ Add Baseline Reference Tasks Text: BL

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1

Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☐ Add Deadline Reference Milestones Text: DL

☐ Add Other Reference Milestones Date field: Date1

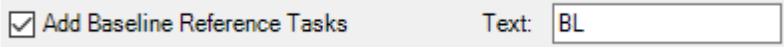
Text: Ref

Accept



The controls within this section allow you to include reference shapes when updating activities on a slide to the current Microsoft Project dates. Below is an explanation of each option:

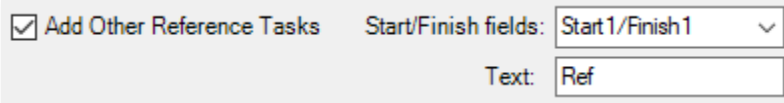
Add Baseline Reference Tasks



Checkbox: select this option to add reference tasks that display the baseline start and finish dates for tasks and summaries.

Text Field: Enter the text label you want to appear next to the baseline reference shapes. For example, "BL" might be used to indicate baseline dates. SSI recommends leaving this field blank if you intend to have a *legend* for baseline reference tasks on the slide.

Add Other Reference Tasks



Checkbox: Select this option to add reference shapes that display dates from other custom Start/Finish fields for tasks and summaries.

Start/Finish Fields Dropdown: Choose the specific Start and Finish fields from Microsoft Project that will be represented by the reference shapes.

Text Field: Enter the text label you want to appear next to these custom reference shapes. For example, "Ref" might be used to indicate a general reference date. SSI recommends leaving this field blank if you intend to have a *legend* for other reference tasks on the slide.

Add Baseline Reference Milestones



Checkbox: Select this option to add reference shapes that display the baseline finish date for milestones.

Text Field: Enter the text label you want to appear next to the baseline milestone reference shapes, such as "BL" for baseline. SSI recommends leaving this field blank if you intend to have a *legend* for baseline reference milestones on the slide.

**Add Deadline Reference Milestones**

☒ Add Deadline Reference Milestones	Text: DL
---	---------------------------------------

Checkbox: Select this option to add reference shapes that display the deadline date for milestones.

Text Field: Enter the text label you want to appear next to the deadline reference shapes, such as "DL" for deadline. SSI recommends leaving this field blank if you intend to have a *legend* for deadline reference milestones on the slide.

Add Other Reference Milestones

☒ Add Other Reference Milestones	Date field: Date1
	Text: Ref

Checkbox: Select this option to add reference shapes that display dates from other custom date fields in Microsoft Project for milestones.

Date Field Dropdown: Choose the specific date field from Microsoft Project that will be represented by the reference shapes.

Text Field: Enter the text label you want to appear next to these custom milestone reference shapes, such as "Ref" for a general reference date. SSI recommends leaving this field blank if you intend to have a *legend* for other reference milestones on the slide.

**Additional Notes:**

While it's possible to connect multiple reference shapes to a single activity on your chart—for instance, a milestone can have both a deadline reference and a baseline reference—SSI recommends limiting the number of reference shapes on a single chart. Adding too many can make the chart appear cluttered and overwhelming for the audience to process.

Reference shapes will only be added for activities that have dates in the corresponding date fields. For example, if you choose to add Baseline Reference Tasks, these shapes will only appear on tasks or summaries that have baseline start and finish dates set in Microsoft Project.

Presentation Pro will automatically create *legends* for the reference shapes chosen to add on update if the **Add task type legends if they do not exist** button is selected on the **Advanced Update Options form**.

Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by: Auto

☒ Add task type legends if they do not exist

☐ Match legend styles on update

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☒ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1 Text: Ref

Reference Milestones

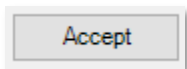
☐ Add Baseline Reference Milestones Text: BL

☒ Add Deadline Reference Milestones Text:

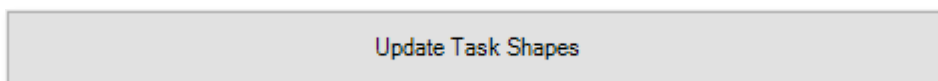
☐ Add Other Reference Milestones Date field: Date1 Text: Ref

Accept

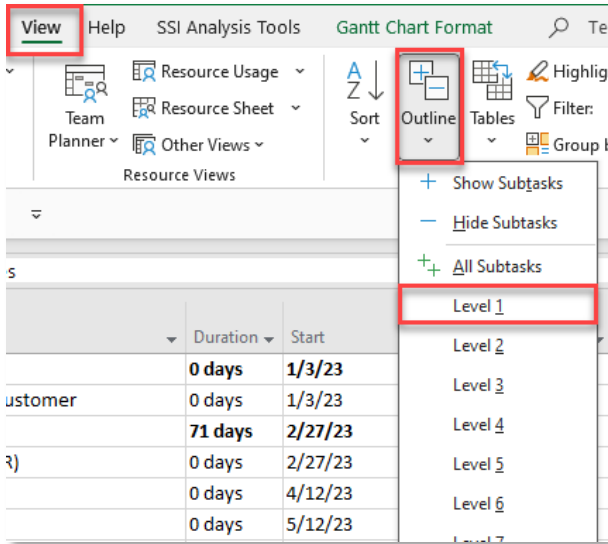
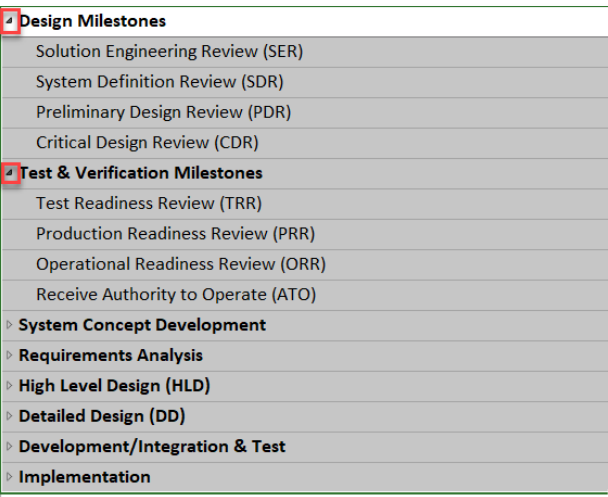
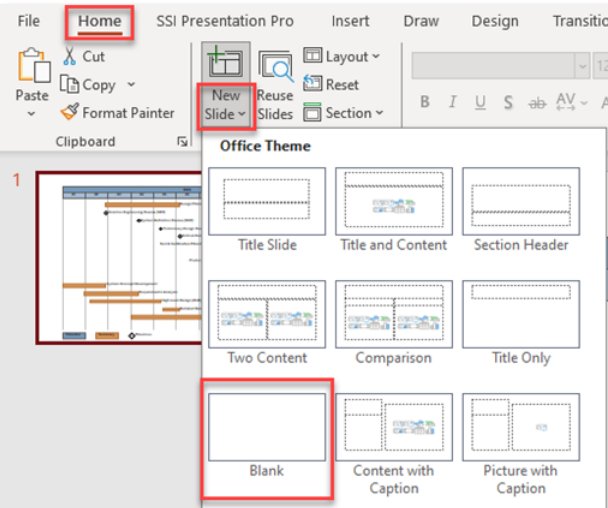
When you are satisfied with your selections, click the **Accept** button in the bottom left corner of the **Advanced Update Options form**.



Once this is done, you can click the **Update Task Shapes** button at the bottom of the **Updater Form**. Reference shapes will be added to the chart during the update process.

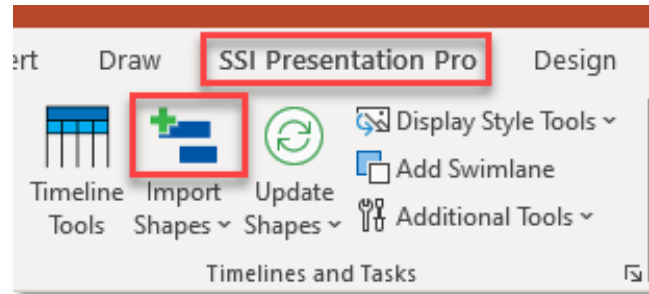


**Class Exercise – Adding Reference Shapes on Update**

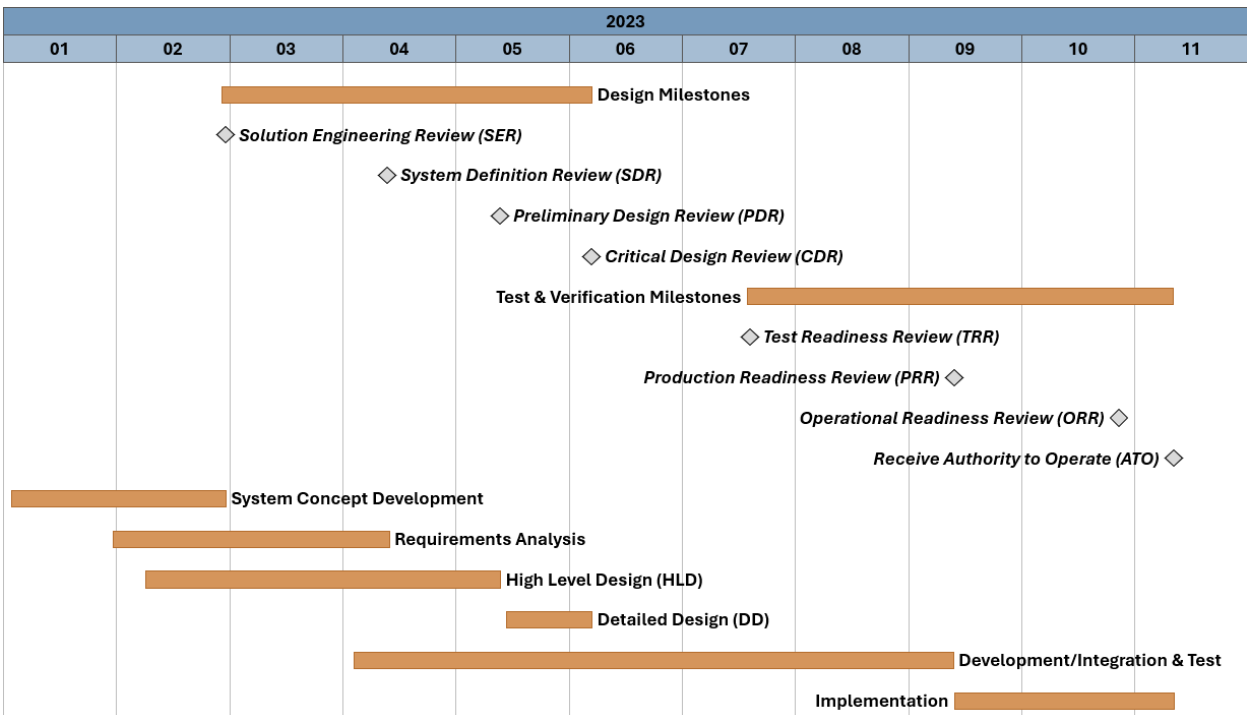
Start of Practice Exercise																						
1. Open the SSI Example Project file in <i>Microsoft Project</i> . Set the outline to Level 1 by using the <i>Outline</i> menu on the <i>View Ribbon</i>	 The screenshot shows the Microsoft Project 'View' ribbon. The 'Outline' button is highlighted with a red box. A dropdown menu is open, showing options: '+ Show Subtasks', '- Hide Subtasks', '+/- All Subtasks', 'Level 1' (highlighted with a red box), 'Level 2', 'Level 3', 'Level 4', 'Level 5', 'Level 6', and 'Level 7'. Below the ribbon, a table of project tasks is visible. <table><tr><th></th><th>Duration</th><th>Start</th></tr><tr><td></td><td>0 days</td><td>1/3/23</td></tr><tr><td>ustomer</td><td>0 days</td><td>1/3/23</td></tr><tr><td></td><td>71 days</td><td>2/27/23</td></tr><tr><td>3)</td><td>0 days</td><td>2/27/23</td></tr><tr><td></td><td>0 days</td><td>4/12/23</td></tr><tr><td></td><td>0 days</td><td>5/12/23</td></tr></table>		Duration	Start		0 days	1/3/23	ustomer	0 days	1/3/23		71 days	2/27/23	3)	0 days	2/27/23		0 days	4/12/23		0 days	5/12/23
	Duration	Start																				
	0 days	1/3/23																				
ustomer	0 days	1/3/23																				
	71 days	2/27/23																				
3)	0 days	2/27/23																				
	0 days	4/12/23																				
	0 days	5/12/23																				
2. 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.	 The screenshot shows the 'Task List' pane in Microsoft Project. It displays a hierarchy of tasks. Under 'Design Milestones', the following tasks are listed: Solution Engineering Review (SER), System Definition Review (SDR), Preliminary Design Review (PDR), and Critical Design Review (CDR). Under 'Test & Verification Milestones', the following tasks are listed: Test Readiness Review (TRR), Production Readiness Review (PRR), Operational Readiness Review (ORR), and Receive Authority to Operate (ATO). Below these, a series of tasks are listed with expand/collapse arrows: System Concept Development, Requirements Analysis, High Level Design (HLD), Detailed Design (DD), Development/Integration & Test, and Implementation.																					
3. Open a presentation in <i>PowerPoint</i> and add a blank slide.	 The screenshot shows the Microsoft PowerPoint 'Home' ribbon. The 'New Slide' button is highlighted with a red box. A dropdown menu is open, showing various slide layouts: Title Slide, Title and Content, Section Header, Two Content, Comparison, Title Only, Blank (highlighted with a red box), Content with Caption, and Picture with Caption.																					



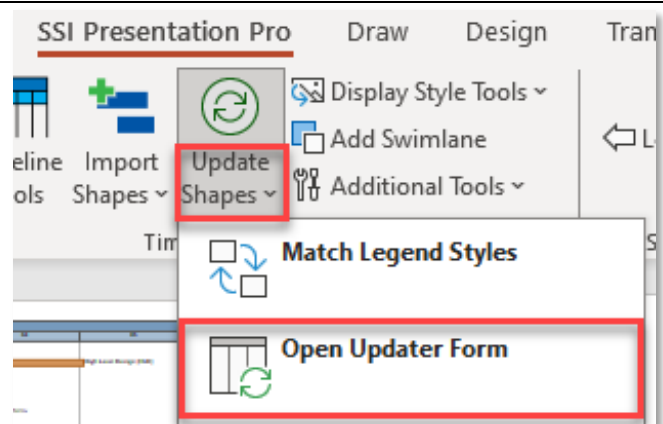
4. Click the top half of the **Import Shapes** button in the **SSI Presentation Pro Ribbon**.



5. Observe the chart created. Notice that there are no reference shapes on any of the activities:



6. Stay on the same slide and open the **Updater Form** by clicking the lower half of the **Update Shapes** button and selecting the **Open Updater Form** option from the menu.





7. Open the **Advanced Update Options** by clicking the **Advanced Microsoft Project Update Options** at the bottom right corner of the **Updater Form**.

Update Shape Dates

Task Name	MSP Linked UID	Start Date	Finish Date
Design Milestones	3	2/27/2023	6/ 6/2023
Solution Engineering Review (SER)	4	2/27/2023	2/27/2023
System Definition Review (SDR)	5	4/12/2023	4/12/2023
Preliminary Design Review (PDR)	6	5/12/2023	5/12/2023
Critical Design Review (CDR)	7	6/ 6/2023	6/ 6/2023
Test & Verification Milestones	8	7/19/2023	11/10/2023
Test Readiness Review (TRR)	9	7/19/2023	7/19/2023
Production Readiness Review (PRR)	10	9/12/2023	9/12/2023
Operational Readiness Review (ORR)	11	10/27/2023	10/27/2023

☒ 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

8. On the **Advanced Update Options form**, check the options to **Add Baseline Reference Tasks** and **Add Deadline Reference Milestones**.

Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by: Auto

☐ Add task type legends if they do not exist

☐ Match legend styles on update

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☒ Add Baseline Reference Tasks Text: BL

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1 Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☒ Add Deadline Reference Milestones Text: DL

☐ Add Other Reference Milestones Date field: Date1 Text: Ref



9. Set the **Text** for both options to be blank.

Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by: Auto

☐ Add task type legends if they do not exist

☐ Match legend styles on update

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☒ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1

Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☒ Add Deadline Reference Milestones Text:

☐ Add Other Reference Milestones Date field: Date1

Text: Ref

10. Check the option to add task type legends if they do not exist:

Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by: Auto

☒ Add task type legends if they do not exist

☐ Match legend styles on update

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☒ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1

Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☒ Add Deadline Reference Milestones Text:

☐ Add Other Reference Milestones Date field: Date1

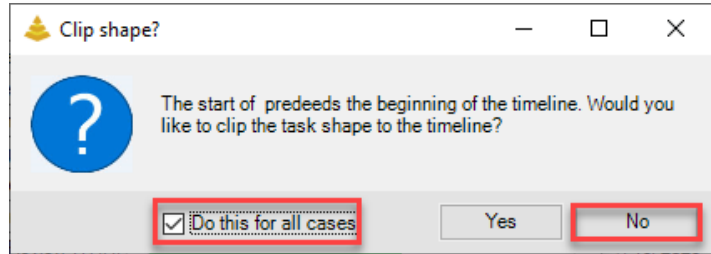
Text: Ref

11. Click the Accept button at the bottom left corner of the **Advanced Update Options form**.

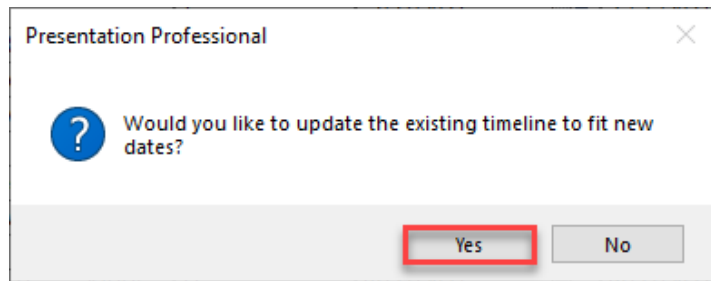
Accept



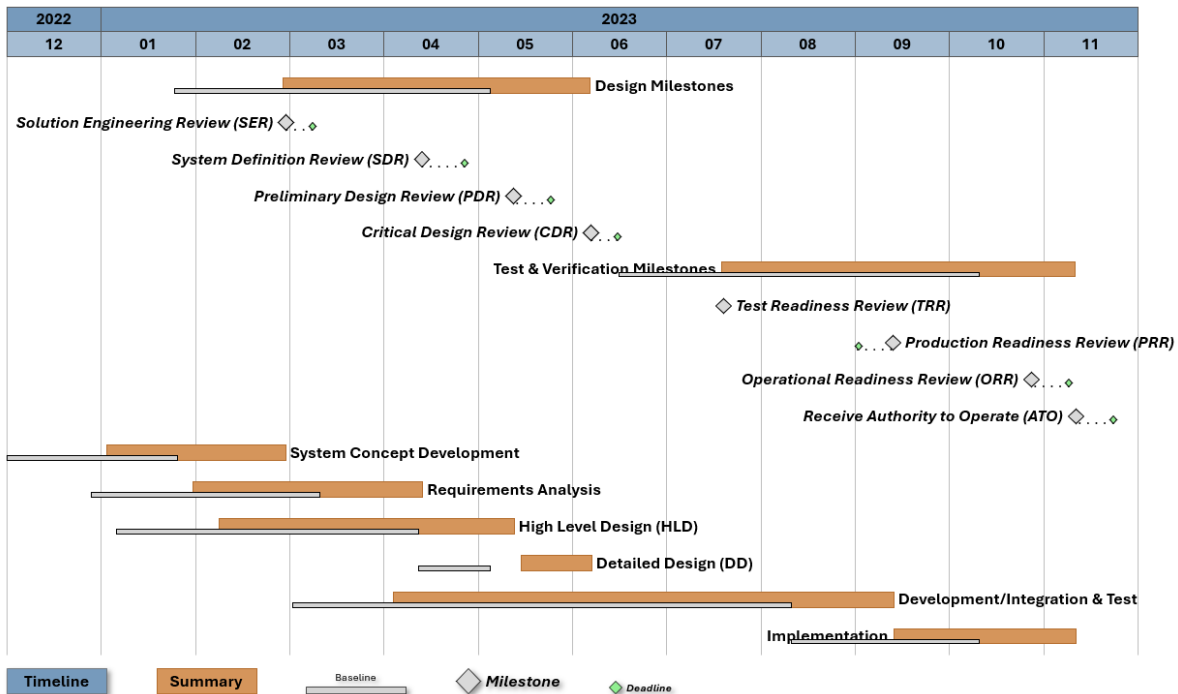
12. A message will appear asking if you would like to clip some of the shapes. Check the *Do this for all cases* option, then click *No*.



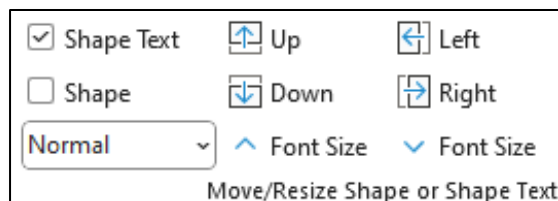
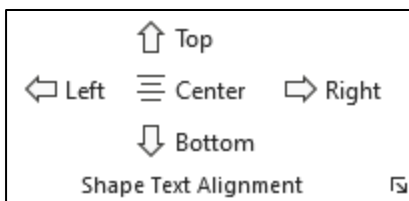
13. Another message will appear asking if you would like to update the existing timeline to fit new dates. Click *Yes*.



14. Observe the updated chart:



15. Use the Tools in the *Shape Text Alignment group* or the *Move/Resize Shape or Shape Text group* in the *SSI Presentation Pro Ribbon* to move text on shapes as desired to present well to the audience.



End of Practice Exercise

Using different date fields for activities

By default, when activities are imported from Microsoft Project onto a PowerPoint slide, Presentation Pro will set the start and finish dates of those activities to their current Start and Finish dates in the Project.

Task Name	Start	Finish
Design Milestones	2/26/24	6/4/24
Solution Engineering Review (SER)	2/26/24	2/26/24
System Definition Review (SDR)	4/10/24	4/10/24
Preliminary Design Review (PDR)	5/10/24	5/10/24
Critical Design Review (CDR)	6/4/24	6/4/24
Test & Verification Milestones	7/17/24	11/8/24
Test Readiness Review (TRR)	7/17/24	7/17/24
Production Readiness Review (PRR)	9/10/24	9/10/24
Operational Readiness Review (ORR)	10/25/24	10/25/24
Receive Authority to Operate (ATO)	11/8/24	11/8/24



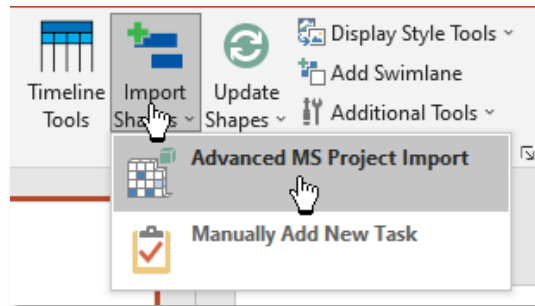
This is the default behavior, but Presentation Pro gives you the option to choose different start and finish date fields from Microsoft Project to code to activities in your chart instead of the regular start and finish..

The Microsoft Project date fields connected to activities in Presentation Pro charts can be changed when content is imported from Project *or* after the fact, providing you with the flexibility to choose which date fields to point activities to while initially building the chart or to change them later if needed.



Changing the Date Fields for Activities on Import

When importing content from Microsoft Project, you can change the date field that will be used for the activities imported by changing the date field options in the **Advanced Import form**. To open this form, click the lower half of the **Import Shapes** button from the **Timelines and Tasks group** in the **SSI Presentation Pro Ribbon**, then choose the **Advanced MS Project Import** option from the menu.



Advanced Import

Advanced Import Basic Options

Project field used to match PowerPoint shapes: **Unique ID**

Project field used to code task types: **Auto**

☐ Override task types to: **Task**

Import onto: **1** page(s)

☐ Import selected items as one shape

☐ Make imported items milestones

☒ Add legend shapes

☐ Add legend for completed tasks and milestones

☒ Import onto current slide ☐ Import onto new slide

Shape Dates

Date fields for tasks:	Date fields for summaries:	Date field for milestones:
Start/Finish	Start/Finish	Finish

Import Display Options

Shape height: **0.15**

Vertical margin between imported shapes: **0.25**

☐ Vertically align all imported items

☒ Auto space shapes

Import Selected Microsoft Project Items



The controls in the *Shape Dates group* within the *Advanced Import* form allow you to control which date fields are to be used for imported tasks, summaries, and milestones from Microsoft Project.

Shape Dates

Date fields for tasks: Start/Finish ▼	Date fields for summaries: Start/Finish ▼	Date field for milestones: Finish ▼
--	--	--

Date fields for tasks

Date fields for tasks:
Start/Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the start and finish dates of *tasks* when they are imported into PowerPoint. By default, this is set to "Start/Finish," meaning the standard Start and Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Start/Finish, Start1/Finish1, etc.

Date fields for summaries

Date fields for summaries:
Start/Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the start and finish dates of *summaries* when they are imported into PowerPoint. By default, this is set to "Start/Finish," meaning the standard Start and Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Start/Finish, Start1/Finish1, etc.

Date field for milestones

Date field for milestones:
Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the dates of *milestones* when they are imported into PowerPoint. By default, this is set to "Finish," meaning the standard Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Finish, Deadline, Date1, etc.

NOTE: It's important to remember that the selected date fields must contain valid dates; otherwise, Presentation Pro won't be able to use them. For instance, if you choose "Baseline Start/Finish" for tasks but the tasks you're importing don't have baseline start and finish dates set, they won't be imported.



Task Name	Baseline Start	Baseline Finish	Start	Finish
▸ Design Milestones	12/28/23	4/5/24	2/26/24	6/4/24
Solution Engineering Review (SER)	12/28/23	12/28/23	2/26/24	2/26/24
System Definition Review (SDR)	2/12/24	2/12/24	4/10/24	4/10/24
Preliminary Design Review (PDR)	3/13/24	3/13/24	5/10/24	5/10/24
Critical Design Review (CDR)	4/5/24	4/5/24	6/4/24	6/4/24
▸ Test & Verification Milestones	5/20/24	9/11/24	7/17/24	11/8/24
Test Readiness Review (TRR)	5/20/24	5/20/24	7/17/24	7/17/24
Production Readiness Review (PRR)	7/12/24	7/12/24	9/10/24	9/10/24
Operational Readiness Review (ORR)	8/28/24	8/28/24	10/25/24	10/25/24
Receive Authority to Operate (ATO)	9/11/24	9/11/24	11/8/24	11/8/24



Shape Dates

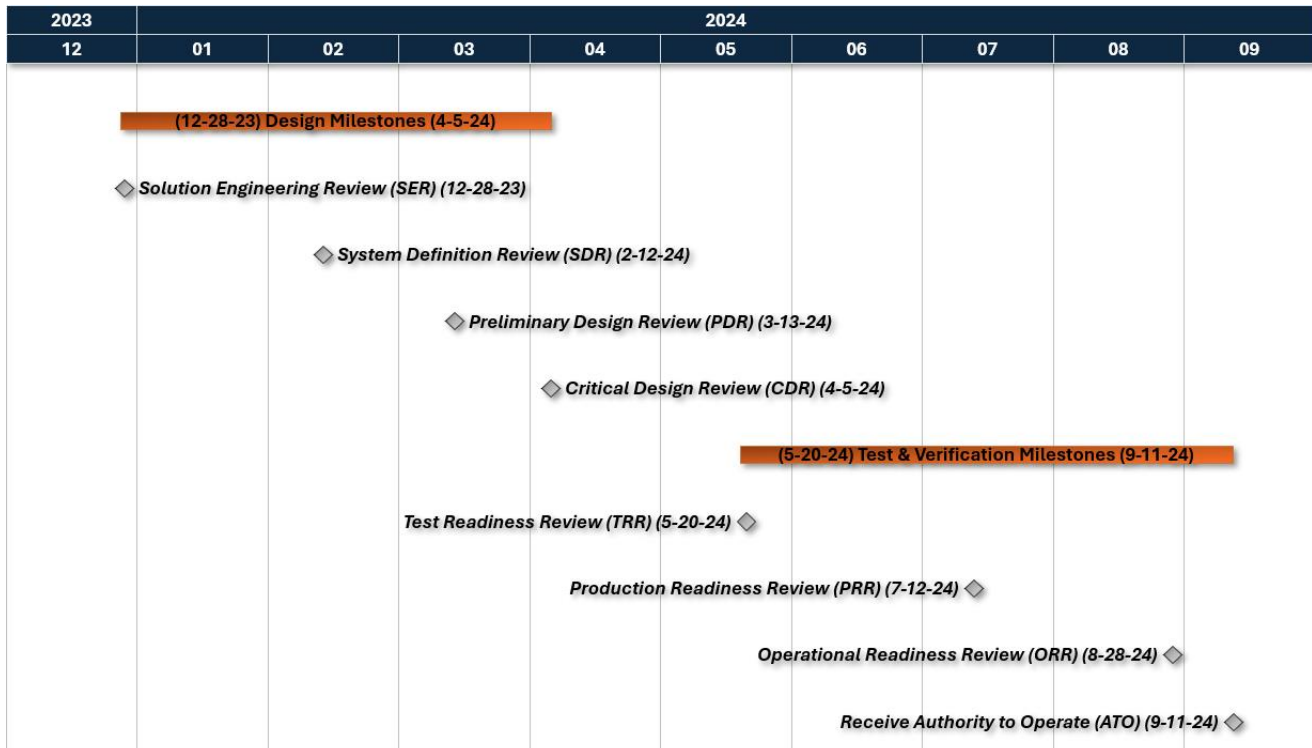
Date fields for tasks:

Date fields for summaries:

Date field for milestones:

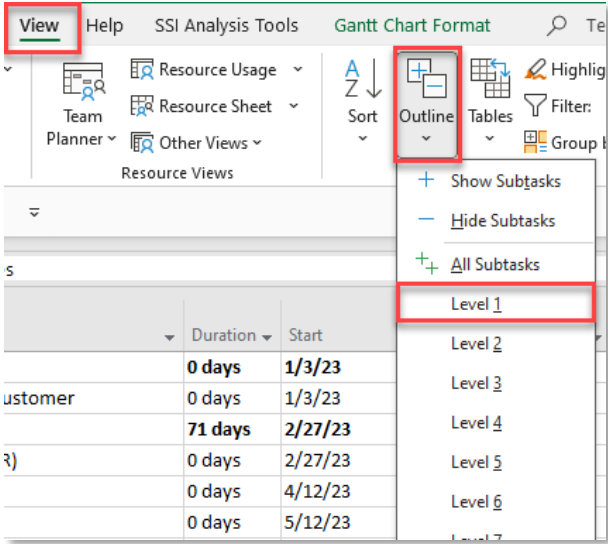
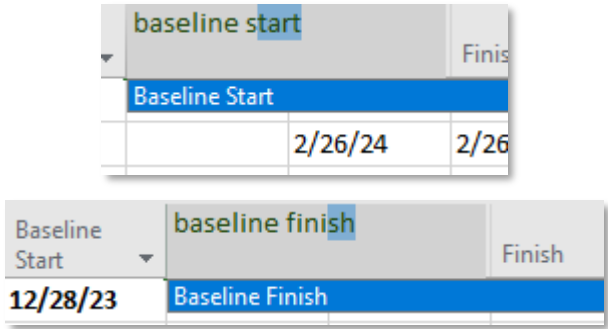
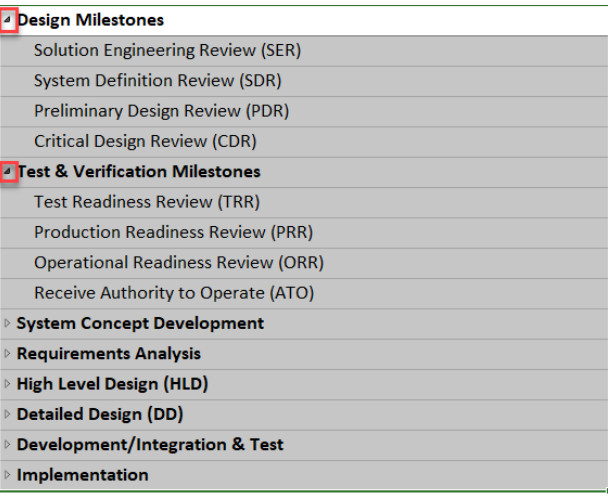
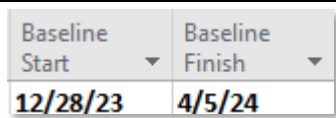


Import Selected Microsoft Project Items



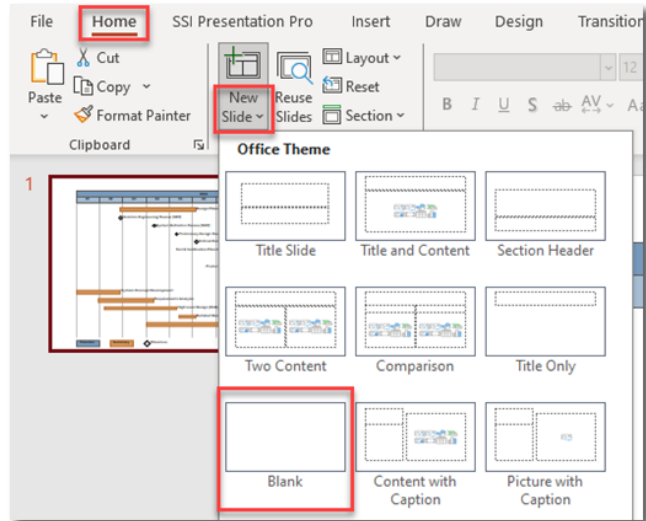


Class Exercise – Changing the Date Fields for Activities on Import

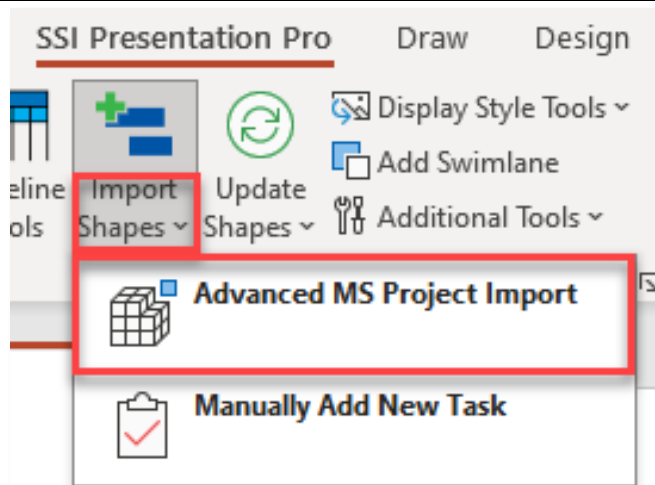
Start of Practice Exercise	
1. Open the SSI Example Project file in <i>Microsoft Project</i> . Set the outline to Level 1 by using the Outline menu on the View Ribbon .	
2. Open the Baseline Start and Baseline Finish columns in the Gantt chart	
3. Click the small triangle button to the left of the name of the summaries on rows 3 and 8 to display their child tasks, then	
4. Ensure the activities all have a baseline start and finish date applied	
5. Select all activities from row 3 down.	



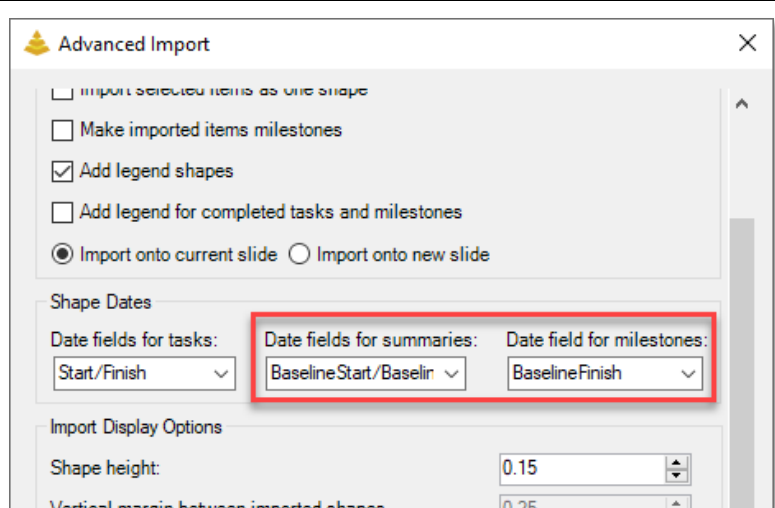
6. Open a presentation in **PowerPoint** and add a blank slide.



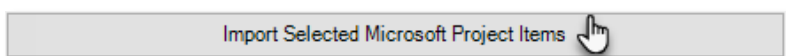
7. In the **SSI Presentation Pro Ribbon**, click the lower half of the **Import Shapes** button and select the **Advanced MS Project Import** option to open the **Advanced Import form**.



8. On the **Advanced Import form**, Set the **Date fields for Summaries** to "BaselineStart/Finish". Set the **Date field for Milestones** to "BaselineFinish"

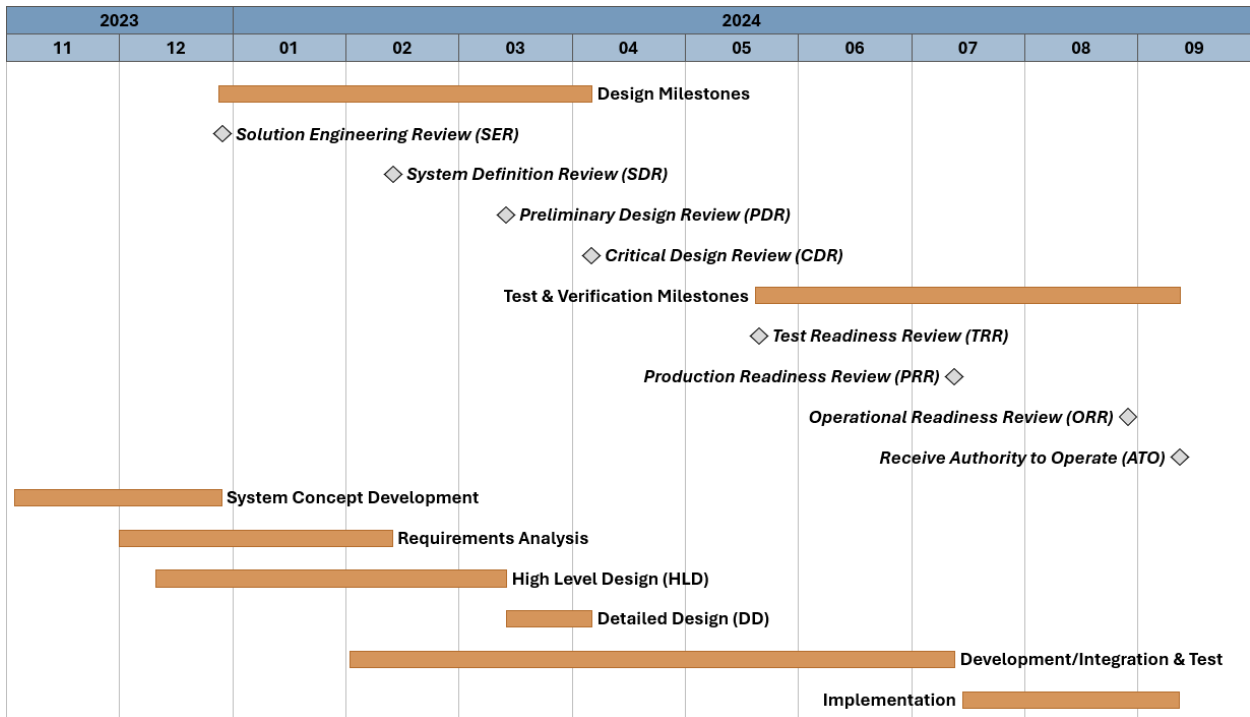


9. Click the **Import Selected Microsoft Project Items** button at the bottom of the form.





10. Observe the chart created. Notice the dates of activities corresponds with their Baseline Start and Finish dates rather than the normal start and finish dates:

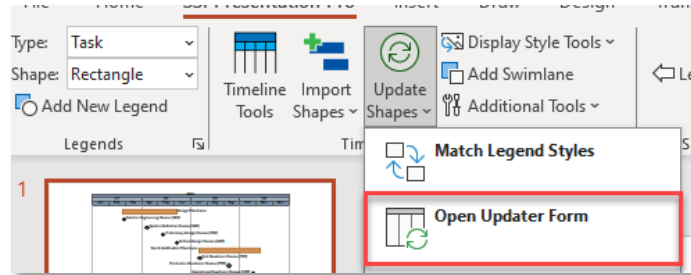


End of Practice Exercise



Changing the Date Fields for Activities on Update

The date fields activities on a chart reference can be added to activities *after* a chart has already been created by Presentation Pro by using the **Advanced Options** on the **Updater Form**.



Task Name	MSP Linked UIDs	Start Date		Finish Date	
Conduct User Surveys	34	2/28/2023		3/ 6/2023	
Develop System Software Requirements	35	3/ 7/2023		3/13/2023	
Develop Test and Evaluation Master Plan	39	2/28/2023		3/27/2023	
Develop Requirements Traceability Matrix	37	3/14/2023		4/ 3/2023	
Generate Developmental Test Plan (DTP)	40	3/28/2023		4/ 3/2023	
Finalize Presentation Materials for SDR	50	4/ 4/2023		4/10/2023	
Ensure SDR Exit Criteria Has Been Met	51	4/11/2023		4/11/2023	
Conduct SDR	52	4/12/2023		4/12/2023	
System Definition Review (SDR)	5	4/12/2023		4/12/2023	

☒ 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

Advanced Microsoft Project Update Options

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Date fields used for shape start and finish

☐ Update shape date fields

Task date fields: Start/Finish

Summary date fields: Start/Finish

Milestone date fields: Finish

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☐ Add Baseline Reference Tasks Text: BL

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1

Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☐ Add Deadline Reference Milestones Text: DL

☐ Add Other Reference Milestones Date field: Date1

Text: Ref



The controls in the *Date fields used for shape start and finish* within the *Advanced Update Options* form allow you to control which Microsoft date fields activities are connected to when the update is performed. You must check the option to *Update shape date fields* for these updates to occur.

Date fields used for shape start and finish

☒ Update shape date fields

Task date fields: Start/Finish ▼

Summary date fields: Start/Finish ▼

Milestone date fields: Finish ▼

Date fields for tasks

Task date fields: Start/Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the start and finish dates of **tasks** on the current chart when they are updated. By default, this is set to "Start/Finish," meaning the standard Start and Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Start/Finish, Start1/Finish1, etc.

Date fields for summaries

Summary date fields: Start/Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the start and finish dates of **summaries** on the current chart when they are updated. By default, this is set to "Start/Finish," meaning the standard Start and Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Start/Finish, Start1/Finish1, etc.

Date field for milestones

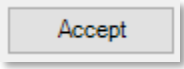
Milestone date fields: Finish ▼

Use this dropdown to select which date fields in Microsoft Project should be used for the start and finish dates of **milestones** on the current chart when they are updated. By default, this is set to "Finish," meaning the standard Finish dates from Microsoft Project will be used. You can change this to other date fields available in your project file, such as Baseline Finish, Deadline, Date1, etc.

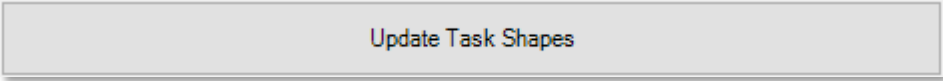


NOTE: It's important to remember that the selected date fields must contain valid dates; otherwise, Presentation Pro won't be able to use them. For instance, if you choose "Baseline Start/Finish" for tasks but the tasks you're importing don't have baseline start and finish dates set, they won't be updated.

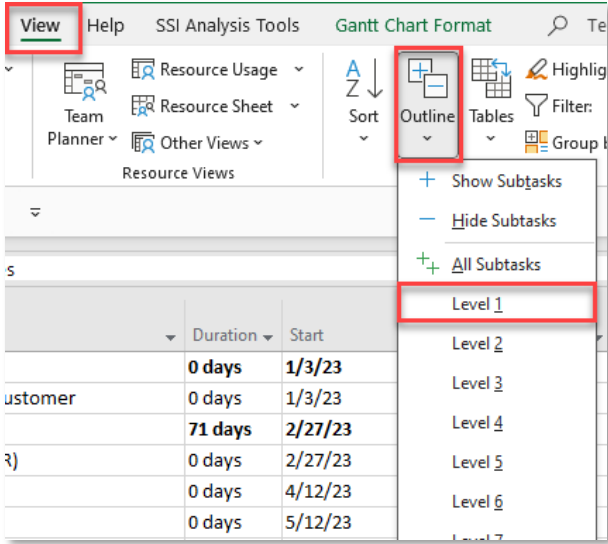
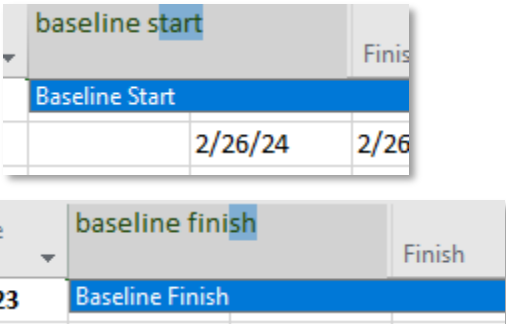
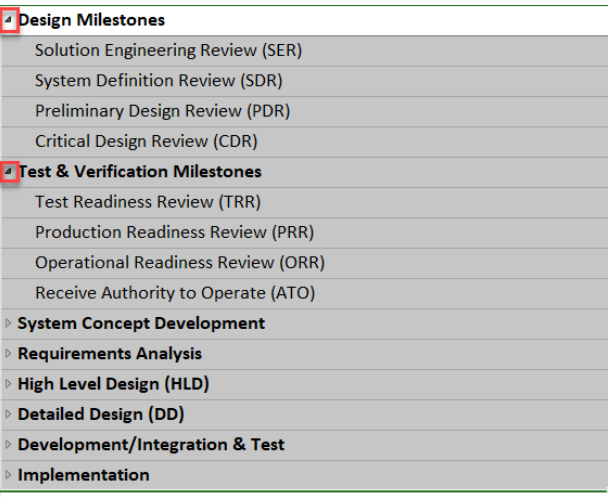
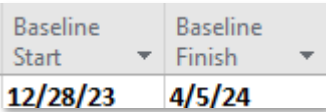
When you are satisfied with your selections, click the ***Accept*** button in the bottom left corner of the ***Advanced Update Options form***:

A rectangular button with a light gray background and a thin border. The word "Accept" is centered in a dark gray font.

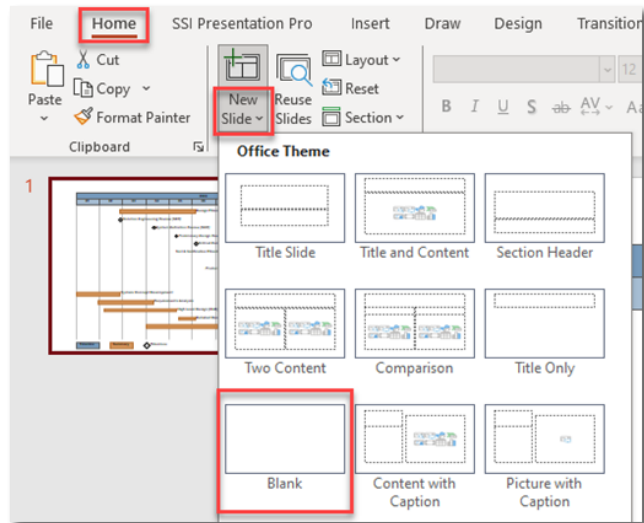
Once this is done, you can click the ***Update Task Shapes*** button at the bottom of the ***Updater Form***. Reference shapes will be added to the chart during the update process.

A wide rectangular button with a light gray background and a thin border. The text "Update Task Shapes" is centered in a dark gray font.

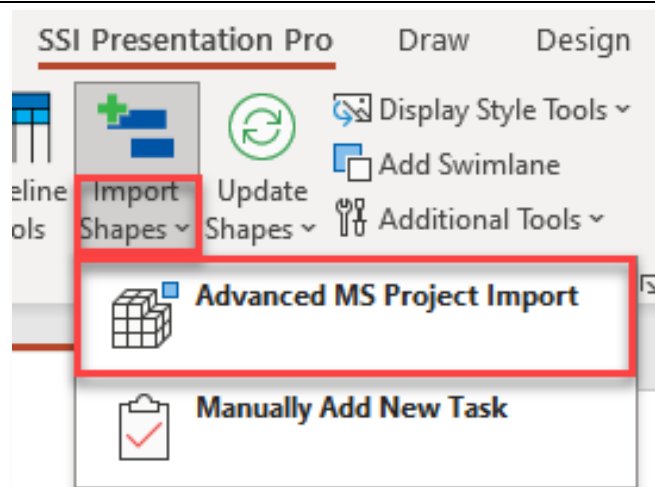
Class Exercise – Changing the Date Fields for Activities on Import

Start of Practice Exercise	
1. Open the SSI Example Project file in <i>Microsoft Project</i> . Set the outline to Level 1 by using the Outline menu on the View Ribbon .	
2. Open the Baseline Start and Baseline Finish columns in the Gantt chart	
3. 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	
4. Ensure the activities all have a baseline start and finish date applied	
5. Select all activities from row 3 down.	

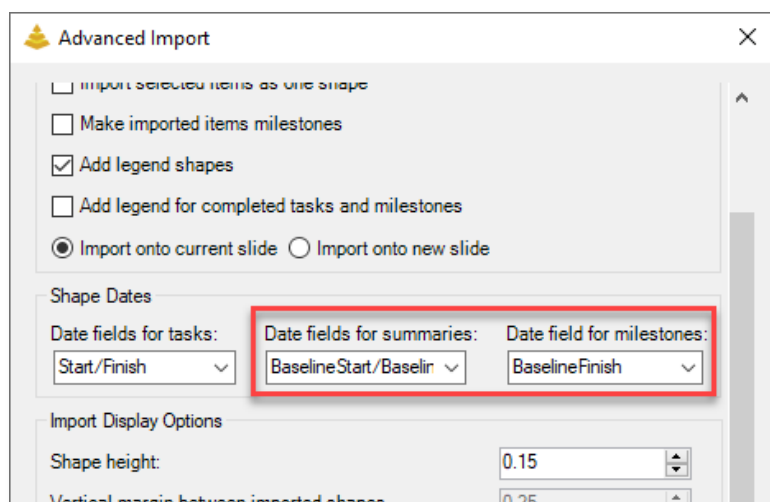
6. Open a presentation in **PowerPoint** and add a blank slide.



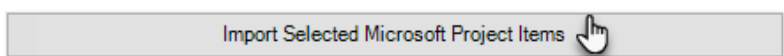
7. In the **SSi Presentation Pro Ribbon**, click the lower half of the **Import Shapes** button and select the **Advanced MS Project Import** option to open the **Advanced Import form**.



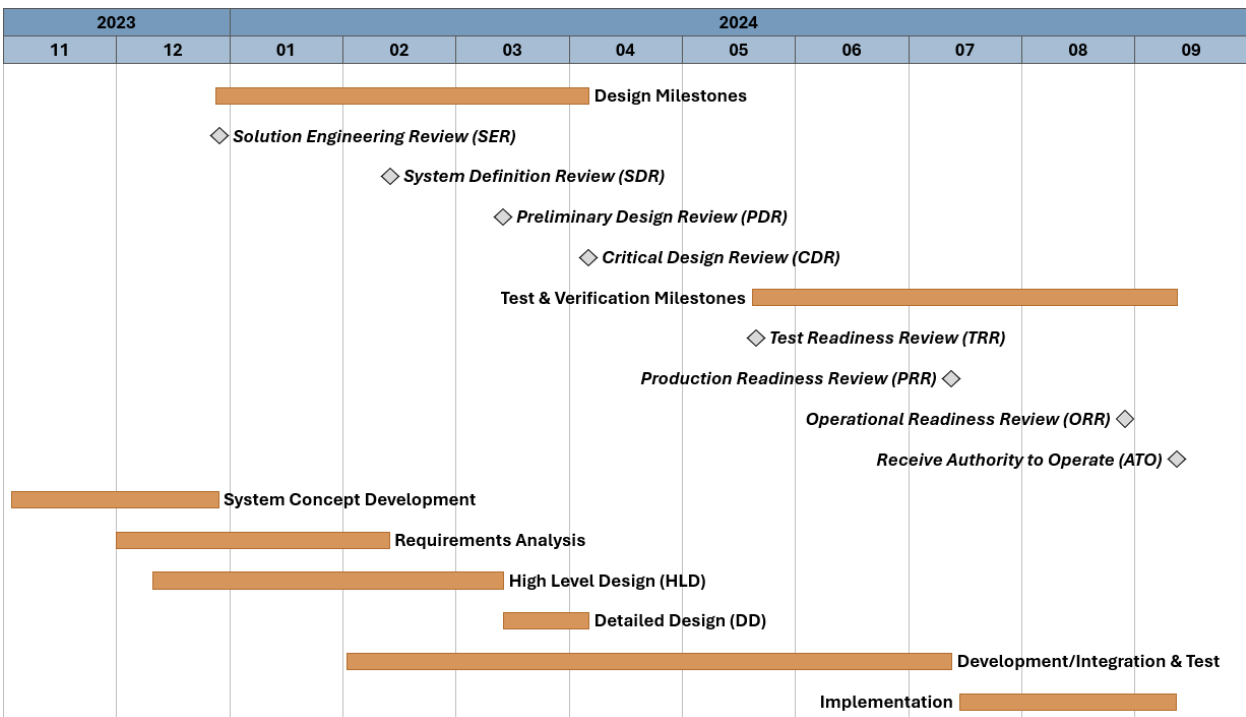
8. On the **Advanced Import form**, Set the **Date fields for Summaries** to "BaselineStart/Finish". Set the **Date field for Milestones** to "BaselineFinish"



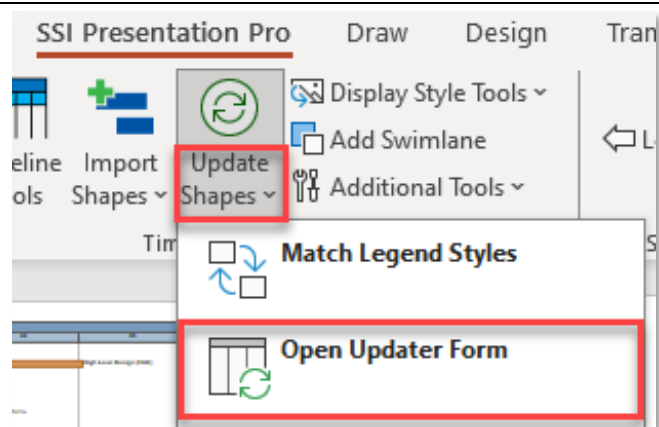
9. Click the **Import Selected Microsoft Project Items** button at the bottom of the form.



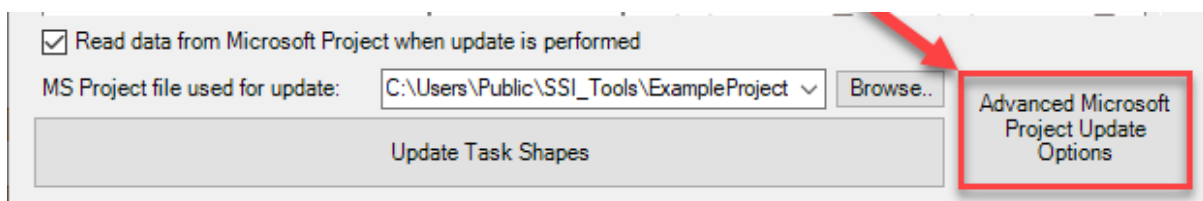
10. Observe the chart created. Notice the dates of activities corresponds with their Baseline Start and Finish dates rather than the normal start and finish dates:



11. Stay on the same slide and open the **Updater Form** by clicking the lower half of the **Update Shapes** button and selecting the **Open Updater Form** option from the menu.



16. Open the **Advanced Update Options** by clicking the **Advanced Microsoft Project Update Options** at the bottom right corner of the **Updater Form**.





17. On the **Advanced Update Options form**, scroll down on the left side to reveal the **Date Fields Used for shape start and finish**. Check the **Update shape date fields** option. Ensure the fields are set to the regular Start/Finish fields for all entries like the image below:

Advanced Microsoft Project Update Options

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Date fields used for shape start and finish

☒ Update shape date fields

Task date fields: Start/Finish

Summary date fields: Start/Finish

Milestone date fields: Finish

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☐ Add Baseline Reference Tasks Text: BL

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1 Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☐ Add Deadline Reference Milestones Text: DL

☐ Add Other Reference Milestones Date field: Date1 Text: Ref

18. Click the Accept button at the bottom left corner of the **Advanced Update Options form**.

Advanced Microsoft Project Update Options

Fields Used for Text Displayed on Shapes

☐ Update text to match selected Project

Task text: Name

Summary text: Name

Milestone text: Name

Date fields used for shape start and finish

☒ Update shape date fields

Task date fields: Start/Finish

Summary date fields: Start/Finish

Milestone date fields: Finish

Accept

Progress Bars

☐ Add Progress bars % complete field: % Complete

Reference Tasks

☐ Add Baseline Reference Tasks Text: BL

☐ Add Other Reference Tasks Start/Finish fields: Start1/Finish1 Text: Ref

Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☐ Add Deadline Reference Milestones Text: DL

☐ Add Other Reference Milestones Date field: Date1 Text: Ref

- Presentation Professional
- Would you like to update the existing timeline to fit new dates?
- Yes No

- | 2023 | | 2024 | | | | | | | | | | | |
|------|----|--------------------------------|----------------------|-----------------------------------|--------------------------------|---------------------------------|------------------------------|--------------------------------------|----|----|----|----|--|
| 11 | 12 | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | |
| | | | | Design Milestones | | | | | | | | | |
| | | | ◆ | Solution Engineering Review (SER) | | | | | | | | | |
| | | | | ◆ | System Definition Review (SDR) | | | | | | | | |
| | | | | | ◆ | Preliminary Design Review (PDR) | | | | | | | |
| | | | | | | ◆ | Critical Design Review (CDR) | | | | | | |
| | | | | Test & Verification Milestones | | | | | | | | | |
| | | | | | | | ◆ | Test Readiness Review (TRR) | | | | | |
| | | | | | | | | Production Readiness Review (PRR) ◆ | | | | | |
| | | | | | | | | Operational Readiness Review (ORR) ◆ | | | | | |
| | | | | | | | | Receive Authority to Operate (ATO) ◆ | | | | | |
| | | System Concept Development | | | | | | | | | | | |
| | | Requirements Analysis | | | | | | | | | | | |
| | | High Level Design (HLD) | | | | | | | | | | | |
| | | | Detailed Design (DD) | | | | | | | | | | |
| | | Development/Integration & Test | | | | | | | | | | | |
| | | | Implementation | | | | | | | | | | |

Page 40