

Contents

Presentation Professional – Adjusting Text on Your Chart	2
Overview.....	2
Moving and Aligning Text on Shapes.....	3
Using the Shape Text Alignment Tools	3
Using the Move/Resize Shape or Shape Text Tools.....	4
Class Exercise – Moving and Aligning Text.....	5
Using the Text Tools	8
Other Text Tools Buttons.....	10
Class Exercise – Using the Text Tools	11
Adding Start or Finish Dates to Shapes	15
Class Exercise – Adding Dates to Selected Shapes	17
Controlling the Text of Imported Items.....	19
Class Exercise – Importing Activities with a Different Text Field.....	22
Updating the Text of Existing Shapes on a Chart	26
Class Exercise – Updating Text on an Existing Chart.....	29

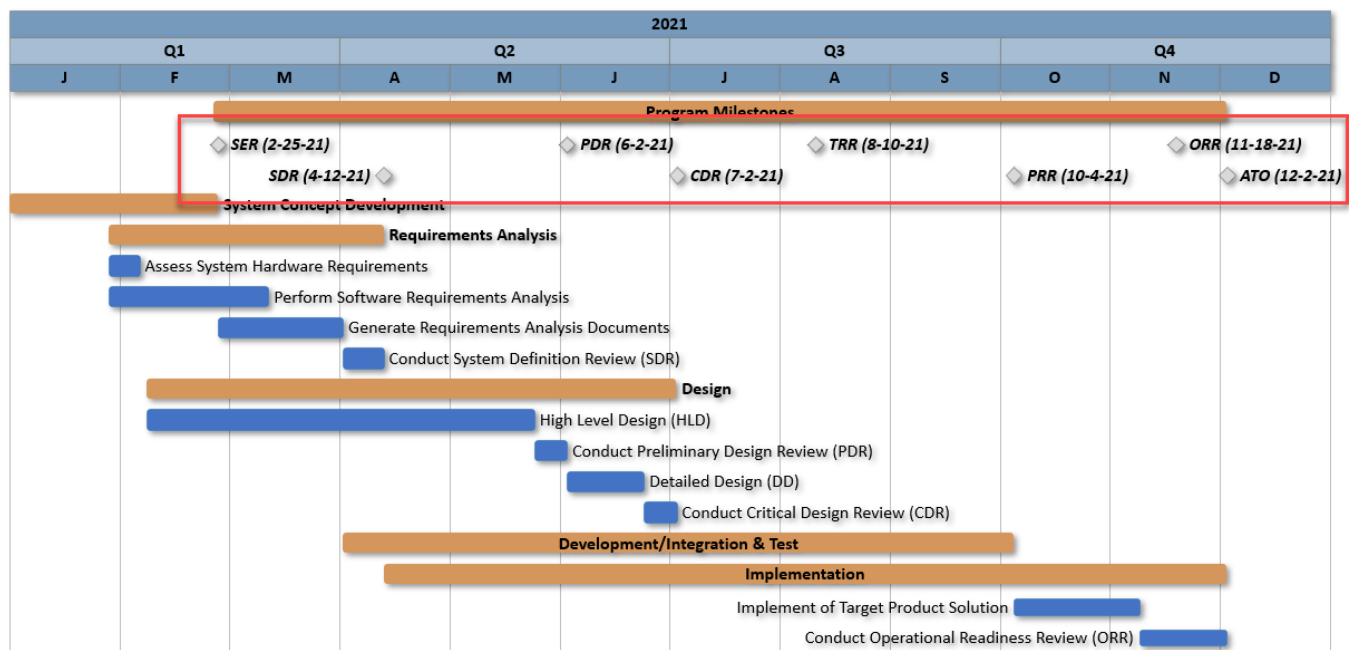
Presentation Professional – Adjusting Text on Your Chart

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 adjust the text of shapes in your chart, including:

- How to move text around shapes
- How to add dates to text on shapes
- How to pull text from various Microsoft Project fields for your shapes

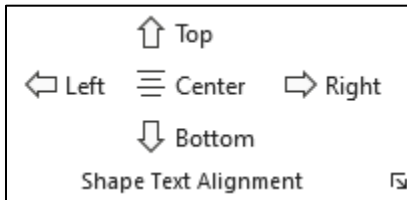


Moving and Aligning Text on Shapes

When creating schedule charts using Presentation Pro, it will be necessary to be able to manipulate the position of text on shapes that are created to present well to the audience. Presentation Pro has many features that can easily manipulate the position of text on shapes.

Using the Shape Text Alignment Tools

The *Shape Text Alignment Tools* are the buttons found in the *Shape Text Alignment Group* of the SSI Presentation Pro Ribbon.



These buttons can completely change the orientation of text on a shape.

- Click the **Left** button to orient text to the left of the shape:

Design Milestones

- Clicking the **Right** button will orient text to the right of the shape:

Design Milestones

- Click the **Top** button to orient text on the top of the shape:

Design Milestones

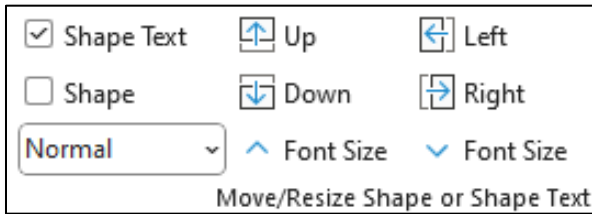
- Clicking the **Bottom** button will orient text on the bottom of the shape:

Design Milestones

- Click the **Center** button to orient text in the center of the shape:

Design Milestones

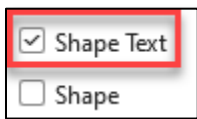
Using the Move/Resize Shape or Shape Text Tools



The buttons in the **Move/Resize Shape or Shape Text Group** of the SSI Presentation Pro Ribbon allow users to “bump” or *incrementally move* text of a shape or the shape itself in the direction clicked on.

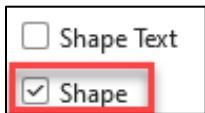
Using the Shape Text/Shape Checkbox Option

When the checkbox option is set to **Shape Text**:



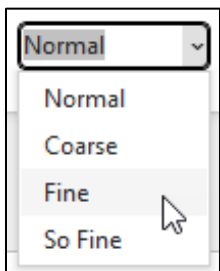
The **Up**, **Down**, **Left**, and **Right** buttons will move the text of selected shapes in the direction selected. Buttons to increase or decrease the font size of the text will also be available:

When the checkbox option is set to just **Shape**:



The **Up**, **Down**, **Left**, and **Right** buttons will move the actual shapes selected in the direction selected. Buttons to increase or decrease the size of the shape will also be available:

Changing the Bump Increment



The **Bump Increment** can be set from the drop-down menu in the **Move/Resize Shape or Shape Text Group**. The **Bump Increment** controls how much shape text or the shape itself is moved each time one of the direction buttons is clicked. The following options are available:

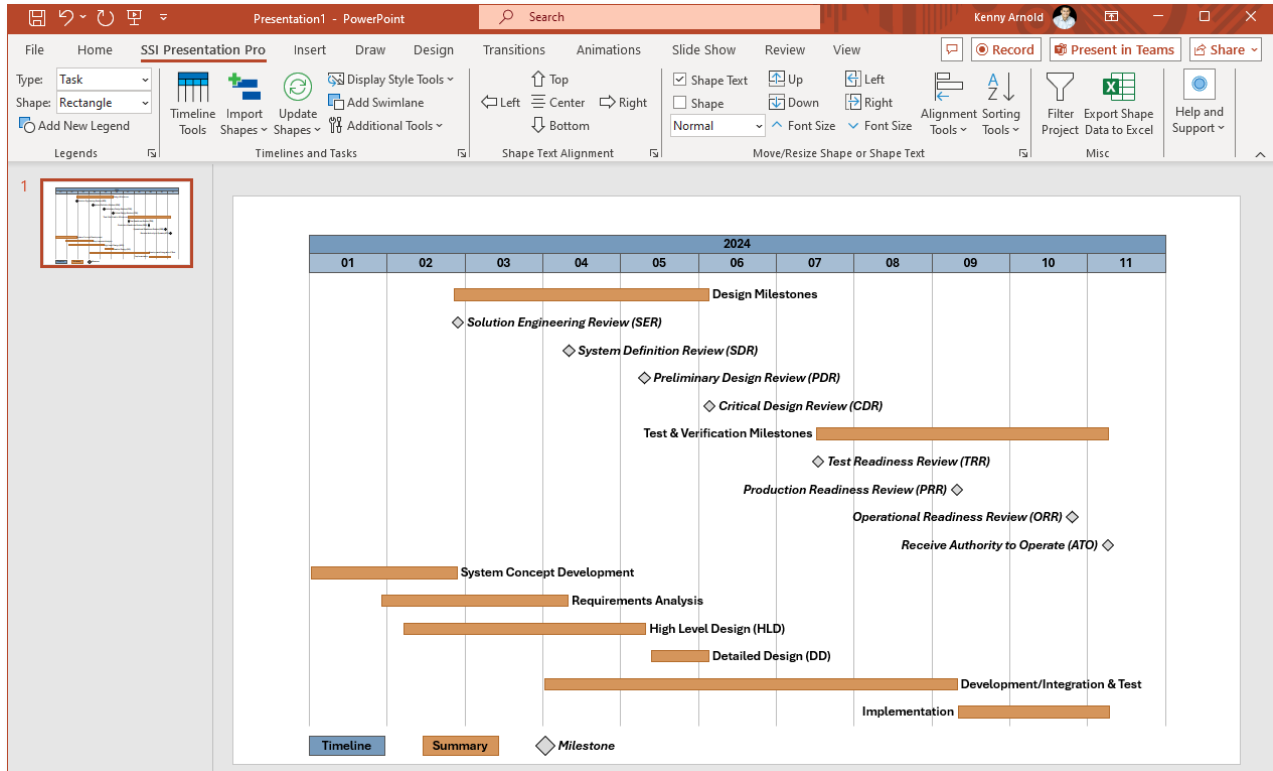
- Normal
- Coarse
- Fine
- So Fine

Normal is the largest bump increment, while **So Fine** is the smallest.

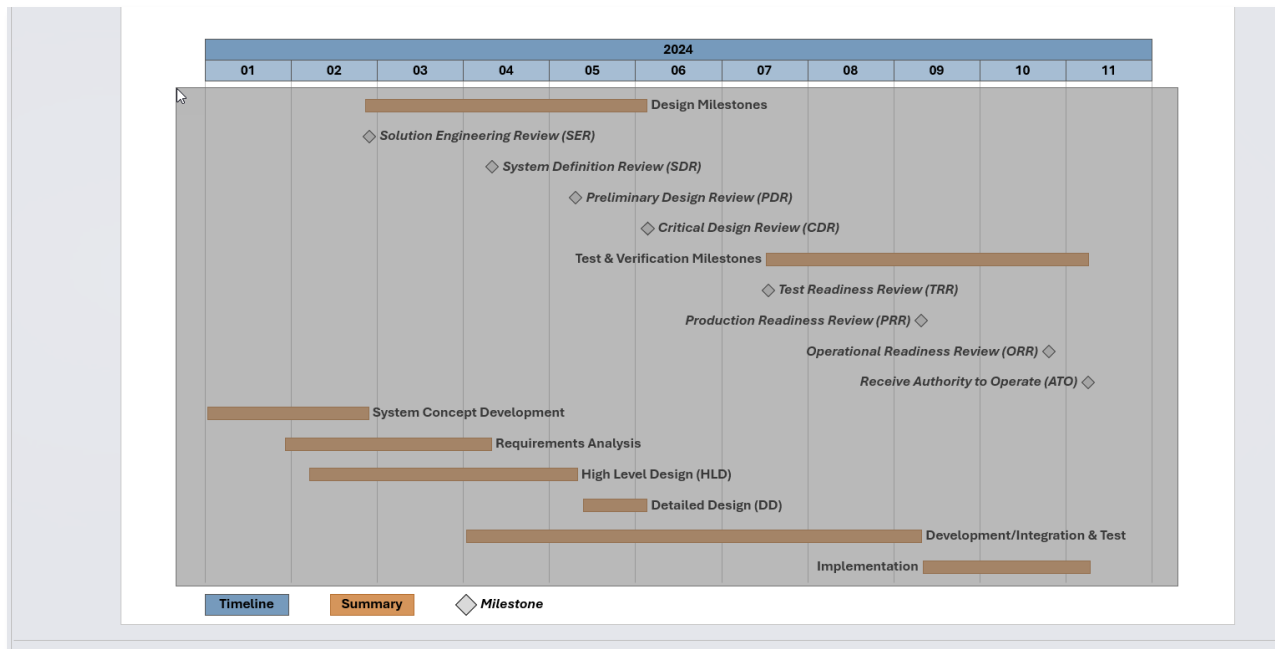
Class Exercise – Moving and Aligning Text

Start of Practice Exercise

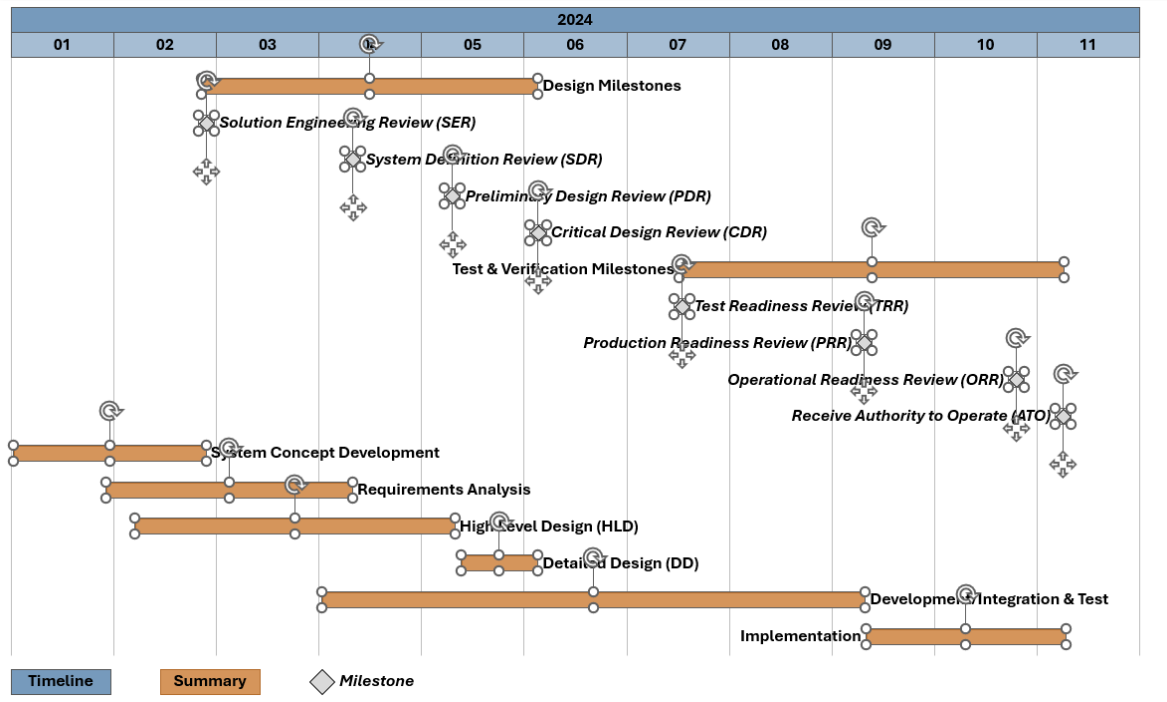
1. Navigate to the chart created in the previous exercise. Refer back to page 5 if this chart needs to be created.



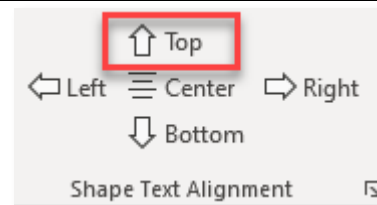
2. Select all of the Activity Shapes on the page by either wrapping a selection around them or holding the **CTRL** or **SHIFT** keys on the keyboard and selecting them one at a time:



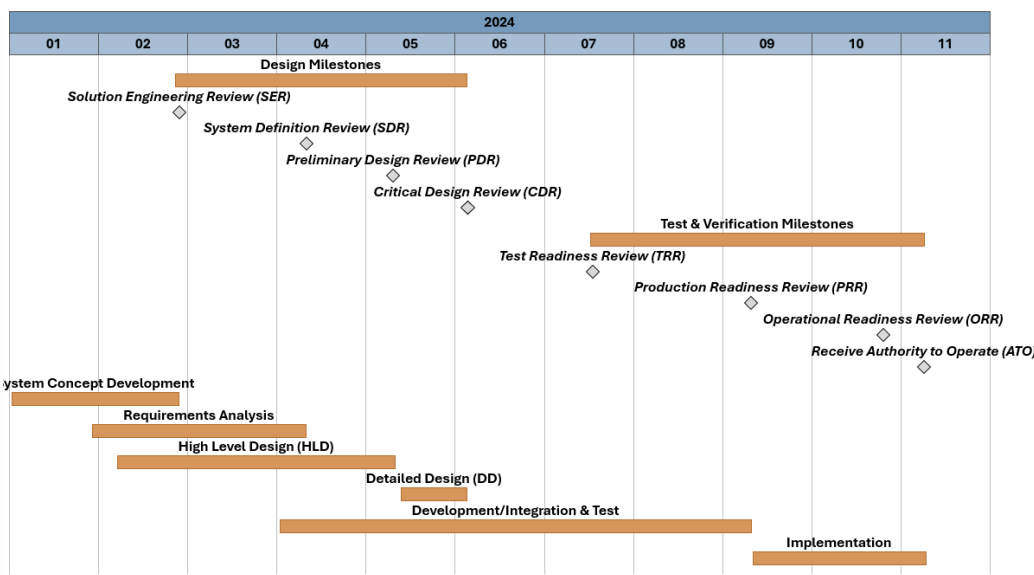
3. Notice white anchor dots will appear around the shapes selected



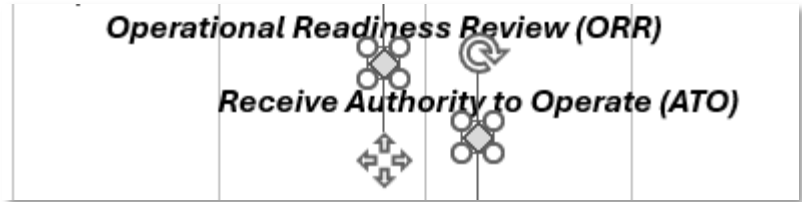
4. With all activity shapes selected, click the **Top** button in the **Shape Text Alignment Group** of the **SSI Presentation Pro Ribbon**.



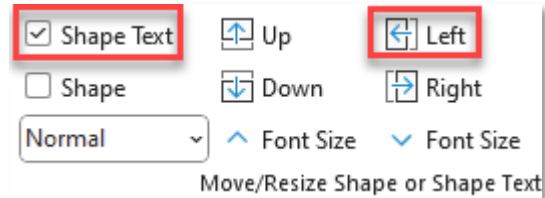
5. Observe the text the activity shapes is now centered *above* the shape.



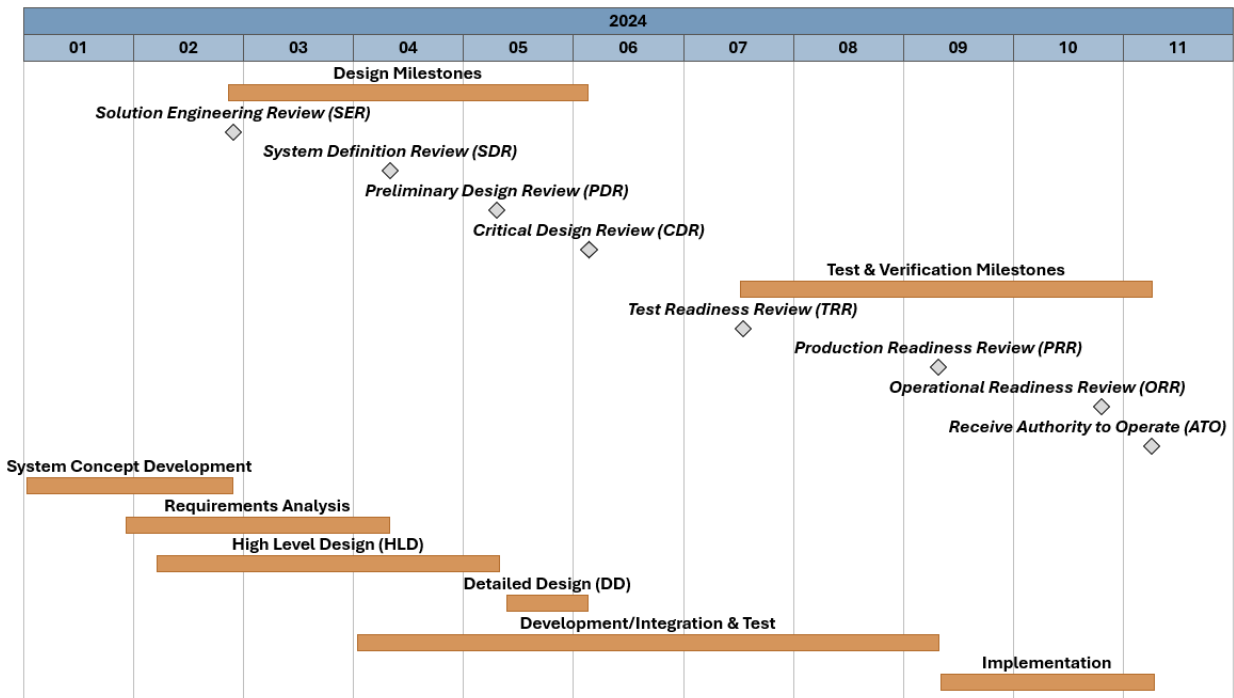
6. Select the milestone shapes *Operational Readiness Review (ORR)* and *Receive Authority to Operate (ATO)*



7. With the *Shape Text* option selected in the *Move/Resize Shape or Shape Text Group*, click the *Left* button several times until the text of both milestones appears within the timeline grid.



8. Observe the chart:

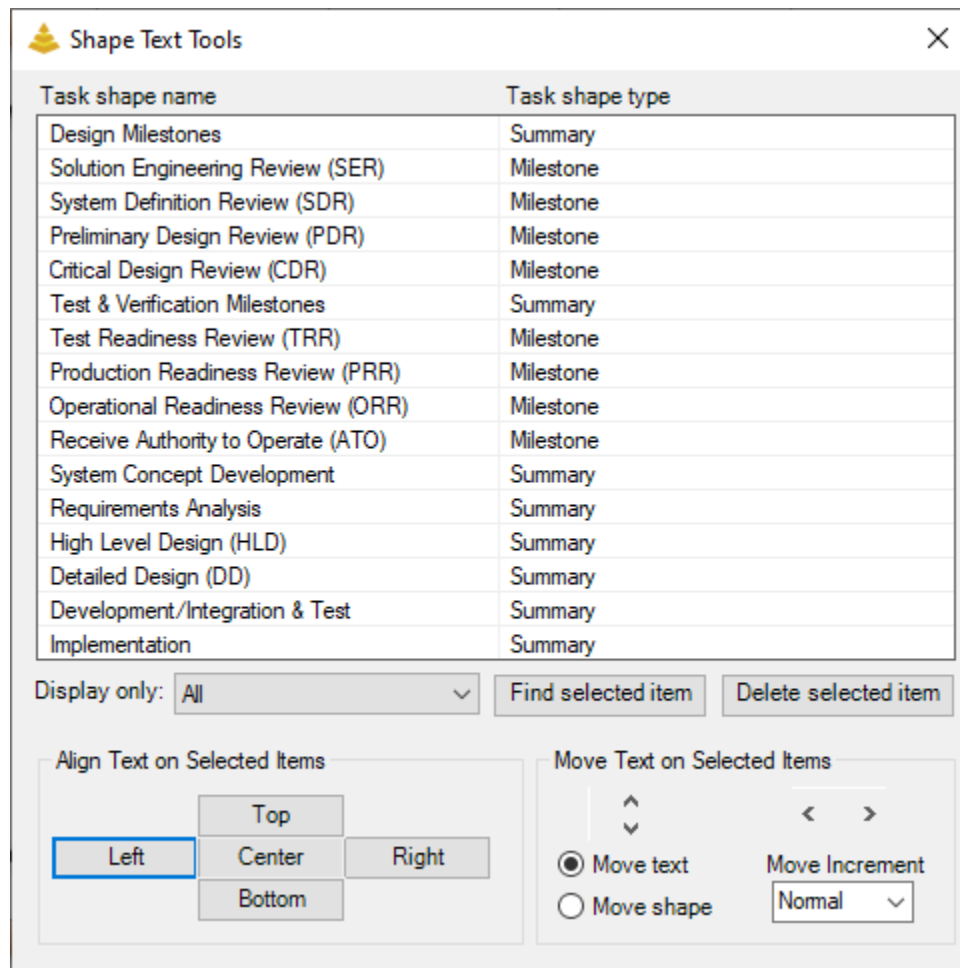


9. Continue adjusting the position of text on the activity shapes as desired.

End of Practice Exercise

Using the Text Tools

As more content is added to a chart, it may become harder to manually select shapes. The **Shape Text Tools** allows users to easily find and select groups of shapes. Users can also use the **Shape Text Tools** to move the text selected shapes around.



Shape Text Tools

Task shape name	Task shape type
Design Milestones	Summary
Solution Engineering Review (SER)	Milestone
System Definition Review (SDR)	Milestone
Preliminary Design Review (PDR)	Milestone
Critical Design Review (CDR)	Milestone
Test & Verification Milestones	Summary
Test Readiness Review (TRR)	Milestone
Production Readiness Review (PRR)	Milestone
Operational Readiness Review (ORR)	Milestone
Receive Authority to Operate (ATO)	Milestone
System Concept Development	Summary
Requirements Analysis	Summary
High Level Design (HLD)	Summary
Detailed Design (DD)	Summary
Development/Integration & Test	Summary
Implementation	Summary

Display only: All Find selected item Delete selected item

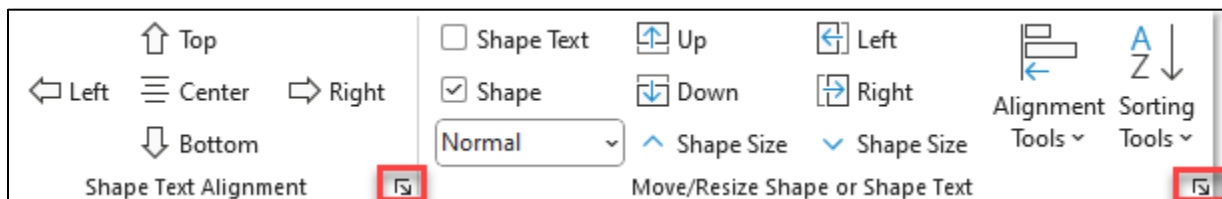
Align Text on Selected Items

☒ Left
 ☐ Top
 ☐ Center
 ☐ Right
 ☐ Bottom

Move Text on Selected Items

☒ Move text
 ☐ Move shape
 Move Increment: Normal

To open the **Shape Text Tools** form, click either of the dialog buttons in the bottom right corner of the **Shape Text Alignment Group** or the **Move/Resize Shape or Shape Text Group** in the **SSI Presentation Pro Ribbon**.



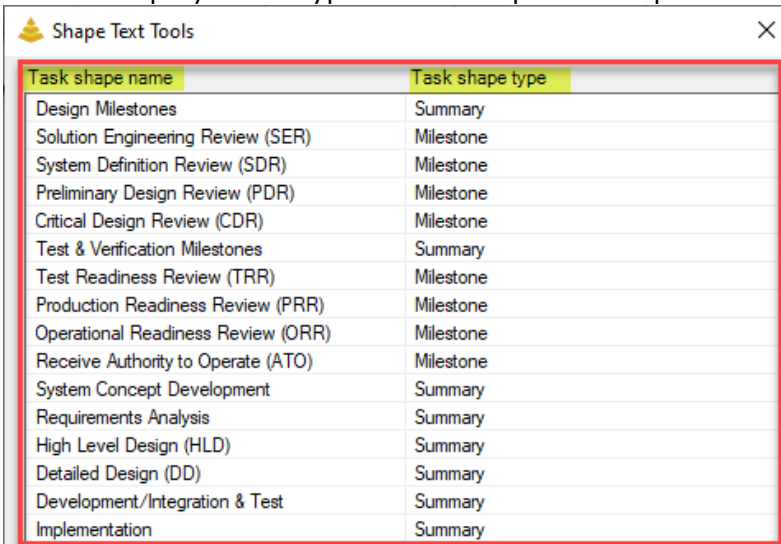
Shape Text Alignment

☐ Shape Text
 ☒ Shape
 Normal

Move/Resize Shape or Shape Text

☒ Move text
 ☐ Move shape
 Move Increment: Normal

The list in the **Shape Text Tools** shows all the SSI Presentation Pro task shapes that exist on the active chart. The first column of the list displays the name or text that appears on the shape, the second column displays what type of task shape the shape is coded as.

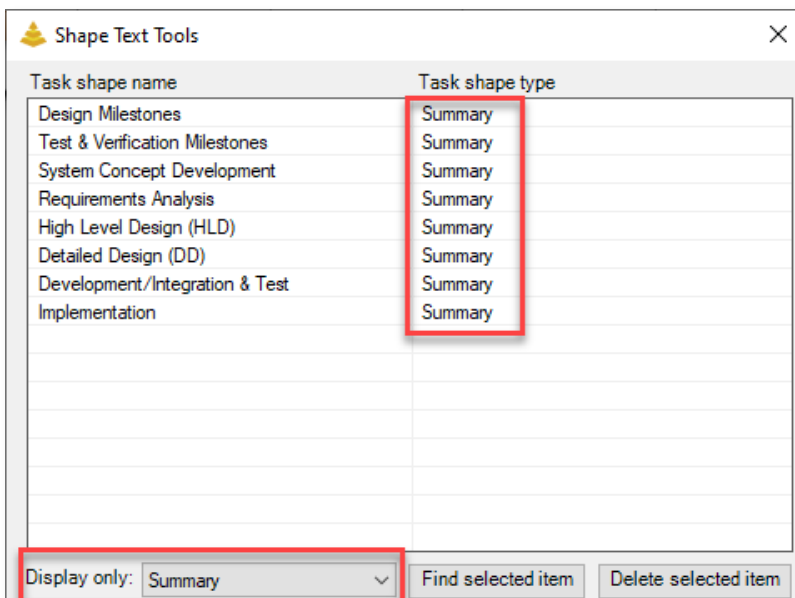
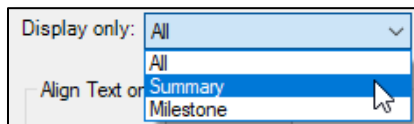


Task shape name	Task shape type
Design Milestones	Summary
Solution Engineering Review (SER)	Milestone
System Definition Review (SDR)	Milestone
Preliminary Design Review (PDR)	Milestone
Critical Design Review (CDR)	Milestone
Test & Verification Milestones	Summary
Test Readiness Review (TRR)	Milestone
Production Readiness Review (PRR)	Milestone
Operational Readiness Review (ORR)	Milestone
Receive Authority to Operate (ATO)	Milestone
System Concept Development	Summary
Requirements Analysis	Summary
High Level Design (HLD)	Summary
Detailed Design (DD)	Summary
Development/Integration & Test	Summary
Implementation	Summary

All the buttons below the list will operate only on the shapes selected in this list.

Using the Display Only Drop Down

The **Display only** drop-down menu allows users to filter the list above for just the task type chosen. For example, if the entry *Summary* is selected in the menu, only shapes that are coded as summaries will be shown in the above list.

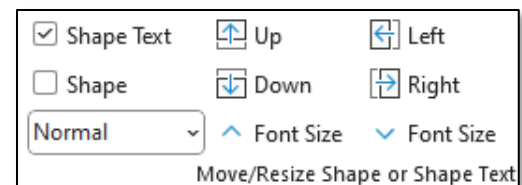
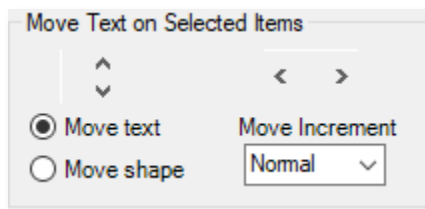
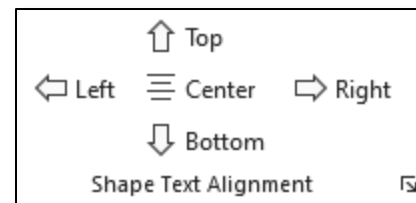
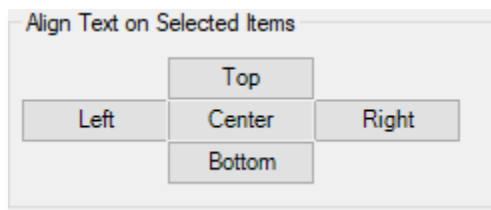


Other Text Tools Buttons

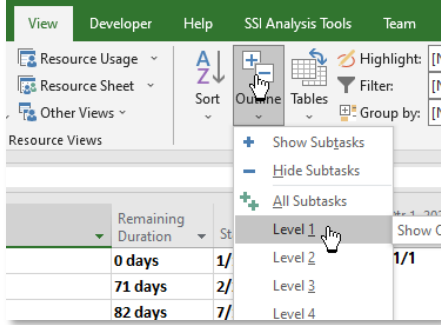
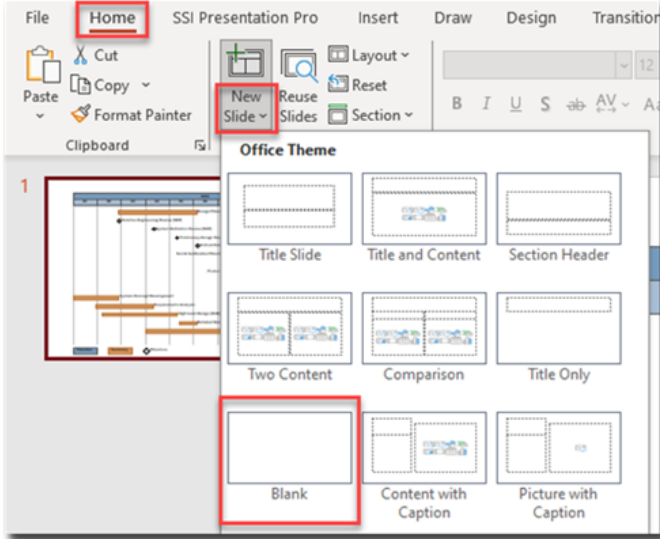
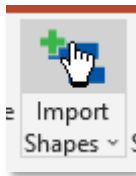
Other buttons on the Text Tools perform the following actions:

- **Find selected item** will select all the items that are selected in the main list on the actual chart itself.
- **Delete selected item** will delete all the items that are selected in the main list on the actual chart itself.

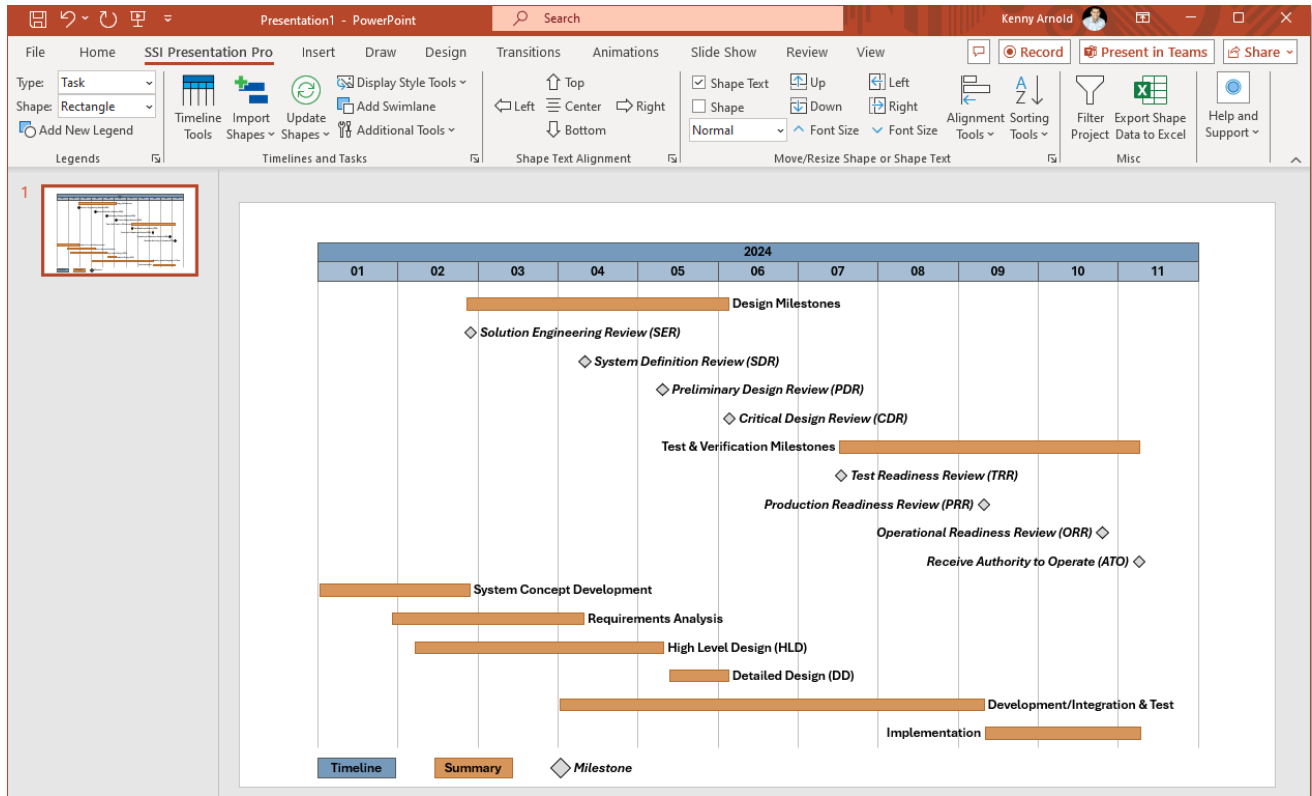
The buttons in the **Align Text on Selected Items** group operate the exact same as the buttons in the **Shape Text Alignment Group** in the *SSi Presentation Pro Ribbon*. The buttons in the **Move Text on Selected Items** group operate the exact same as the buttons in the **Move/Resize Shape or Shape Text Group** in the *SSi Presentation Pro Ribbon*, the only difference being that these buttons perform actions on the shapes selected in the **Shape Text Tools** list, rather than the shapes that are currently selected on the chart.



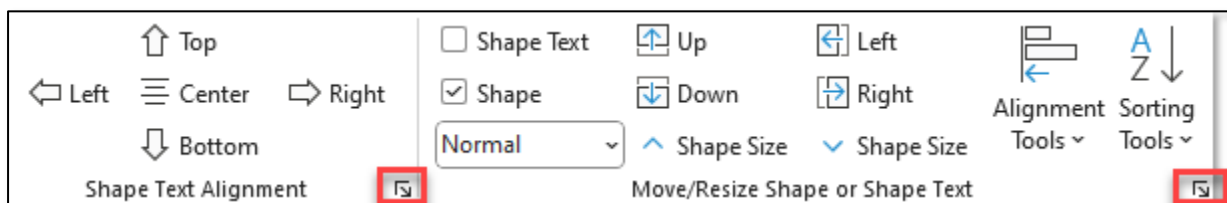
Class Exercise – Using the Text Tools

Start of Practice Exercise	
1. Open the SSi Example Project File and set the outline level to Level 1 (done by clicking the <i>Outline</i> button in the <i>View</i> ribbon)	
2. Expand rows 3 and 8, then select all of the tasks from row 3 down.	
3. Navigate back to PowerPoint and open a blank slide.	
4. Click the top half of the <i>Import Shapes</i> button in the <i>SSi Presentation Pro Ribbon</i>	

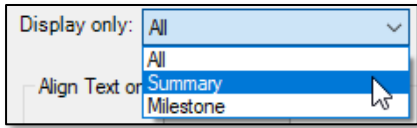
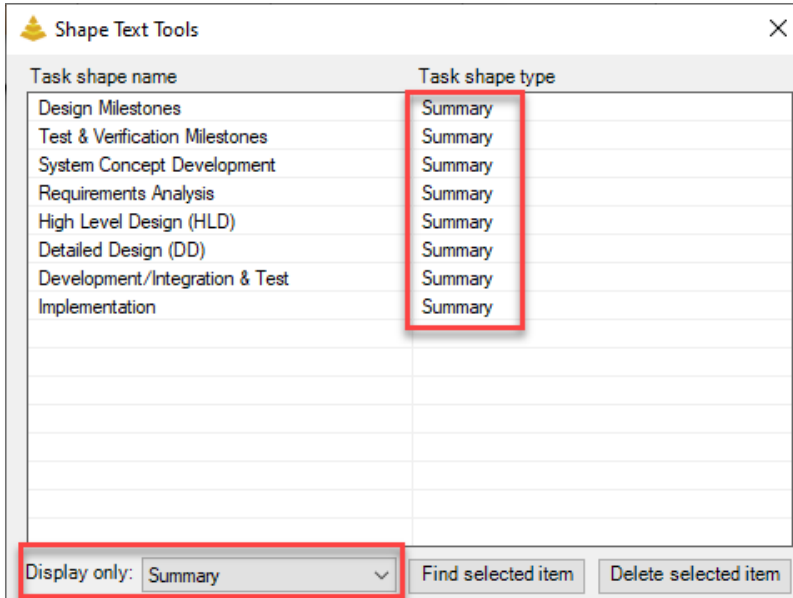
5. the output should look like the following:



6. Click either of the buttons in the bottom right corner of the **Shape Text Alignment Group** or **Move/Resize Shape or Shape Text** group to open the **Text Tools** dialog.



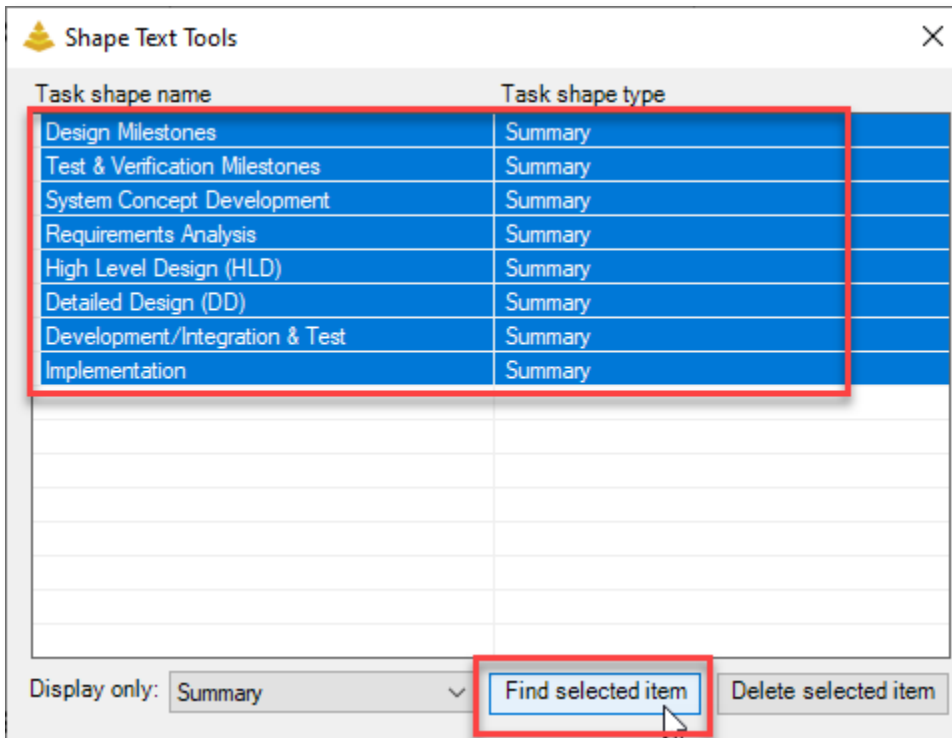
7. On the **Text Tools** form, click the **Display Only** drop-down and select **Summary** to filter the task list for summaries only.

Task shape name	Task shape type
Design Milestones	Summary
Test & Verification Milestones	Summary
System Concept Development	Summary
Requirements Analysis	Summary
High Level Design (HLD)	Summary
Detailed Design (DD)	Summary
Development/Integration & Test	Summary
Implementation	Summary

Display only: Summary Find selected item Delete selected item

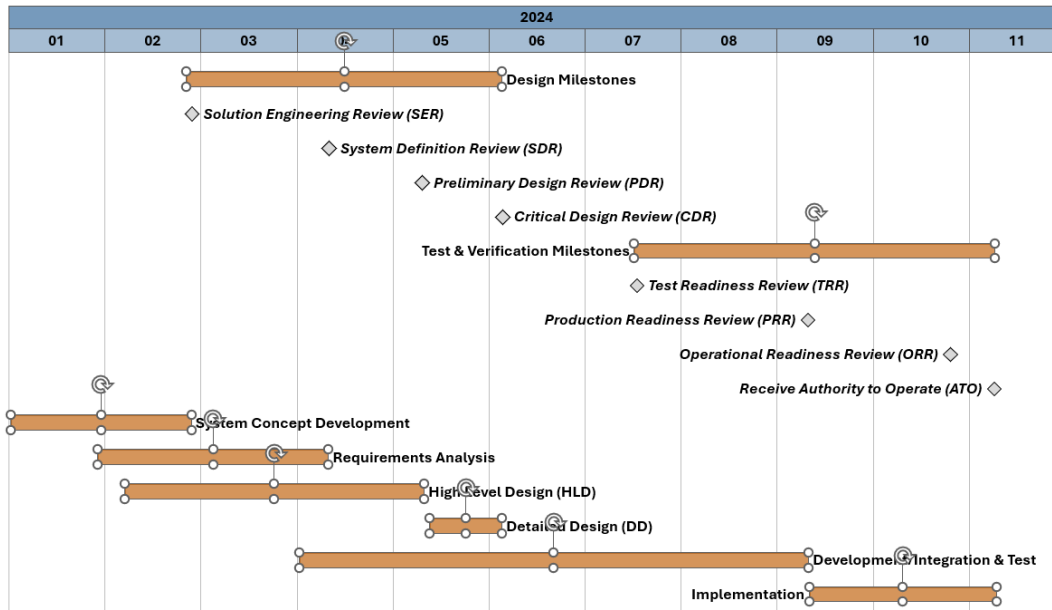
8. Select all Summary items in the list and click the **Find selected item** button.



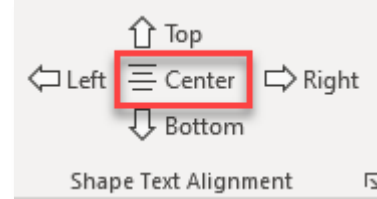
Task shape name	Task shape type
Design Milestones	Summary
Test & Verification Milestones	Summary
System Concept Development	Summary
Requirements Analysis	Summary
High Level Design (HLD)	Summary
Detailed Design (DD)	Summary
Development/Integration & Test	Summary
Implementation	Summary

Display only: Summary Find selected item Delete selected item

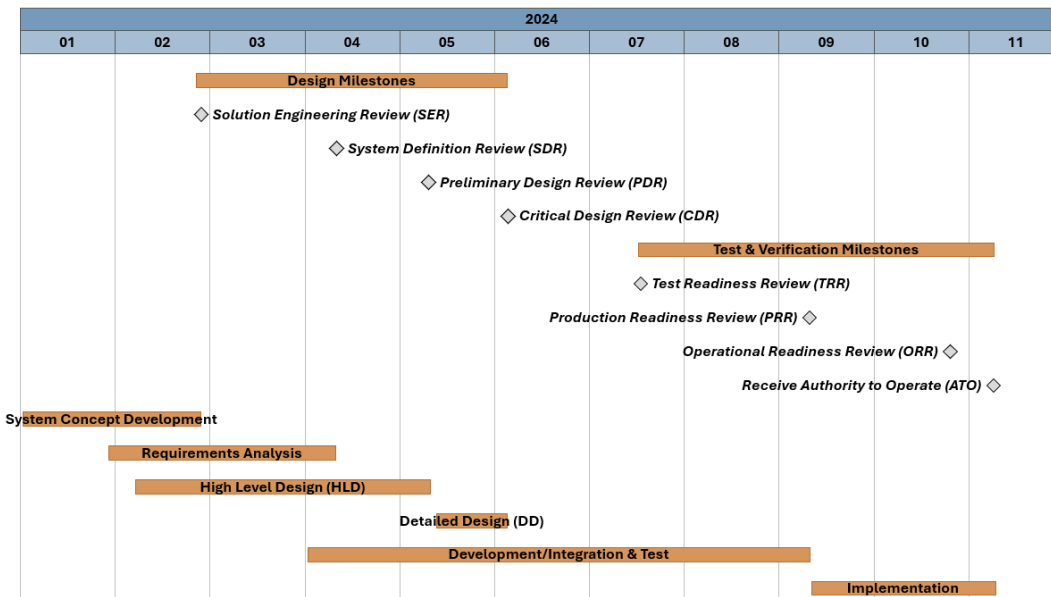
9. Observe that all summary shapes have now been selected on the slide



10. With all summary shapes selected, click the **Center** button in the **Shape Text Alignment Group** of the Presentation Pro ribbon.



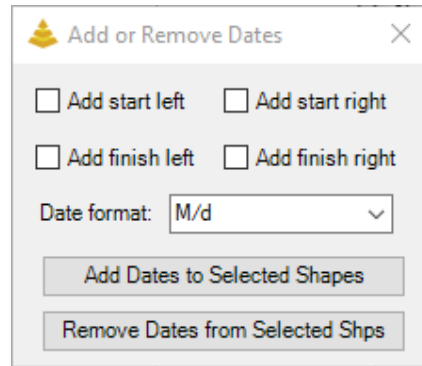
11. Observe the text on all Summaries is now centered on the shape



End of Practice Exercise

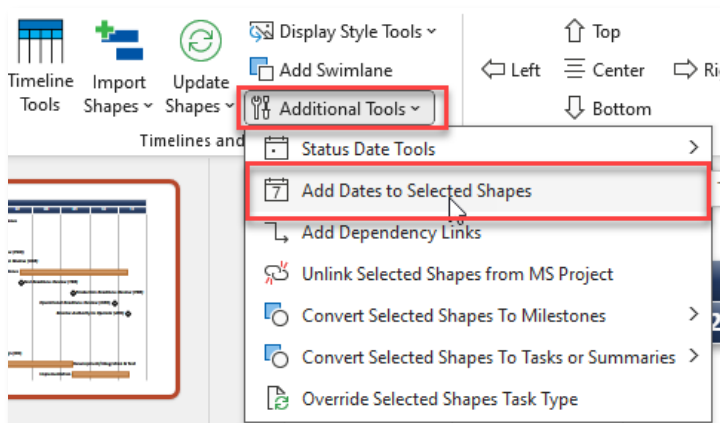
Adding Start or Finish Dates to Shapes

Users can use the **Add or Remove Dates** form to add or remove dates onto SSI Presentation Pro task shapes.

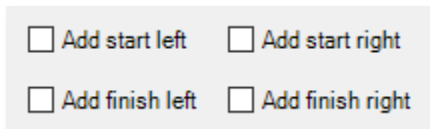


The dialog box titled "Add or Remove Dates" contains four checkboxes: "Add start left", "Add start right", "Add finish left", and "Add finish right". Below these is a "Date format:" dropdown menu currently set to "M/d". At the bottom are two buttons: "Add Dates to Selected Shapes" and "Remove Dates from Selected Shps".

To access this form, click the **Add Dates to selected shapes** button in the **Additional Tools** menu. The **Additional Tools** menu can be found in the **Timelines and Tasks Group** of the **SSI Presentation Pro Ribbon**.



The following date display options are available:



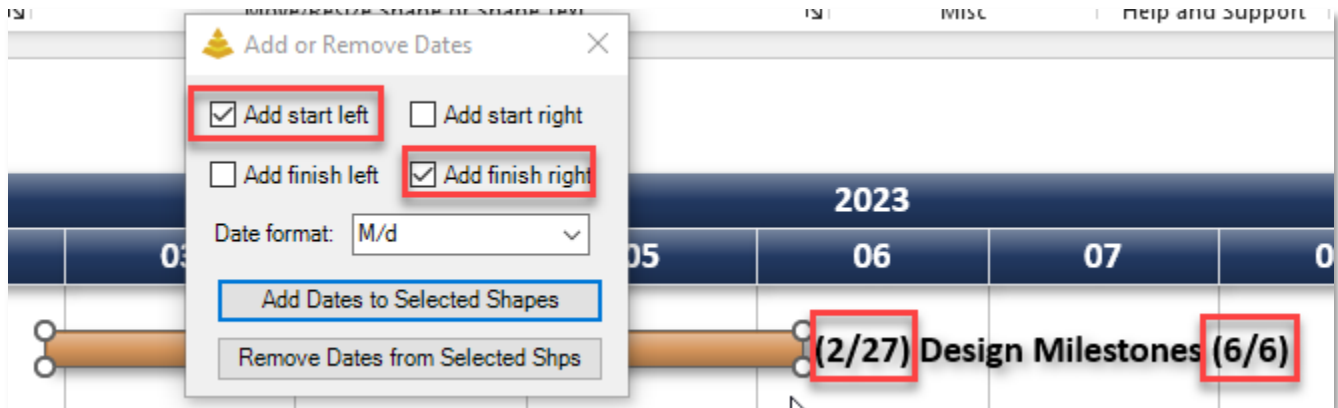
A small form with four checkboxes: "Add start left", "Add start right", "Add finish left", and "Add finish right".

- **Add start left** – check this option if you want to add the start date to the left of the text of selected shapes.
- **Add finish left** – check this option if you want to add the finish date to the left of the text of selected shapes.
- **Add start right** – check this option if you want to add the start date to the right of the text of selected shapes.
- **Add finish right** – check this option if you want to add the finish date to the right of the text of selected shapes.

The **Date format** drop-down menu allows users to select the desired date format they want to display on shapes.

Once options have been selected, users can add dates to any task shapes that are selected by clicking the **Add Dates to Selected Shapes** button.

Note: that these options add dates to the left or right of the *Text Frame* of selected shapes, not to the left or right of the shapes themselves.



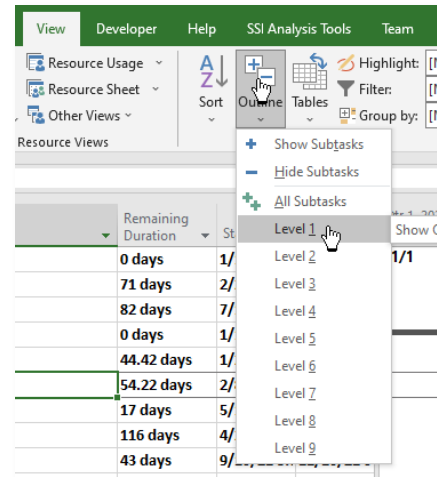
You can also remove dates from any selected task shapes by clicking **Remove Dates from Selected Shapes**.

It's necessary to use this tool to add dates rather than manually typing them in. When you use this tool, Presentation Pro applies special coding to the selected shapes, so it knows the dates are there. This way, Presentation Pro will be able to update the dates when the chart is synchronized with Microsoft Project.

Class Exercise – Adding Dates to Selected Shapes

Start of Practice Exercise

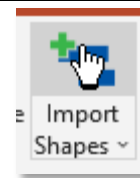
1. Open the [SSi Example Project file](#) and set the outline level to level 1



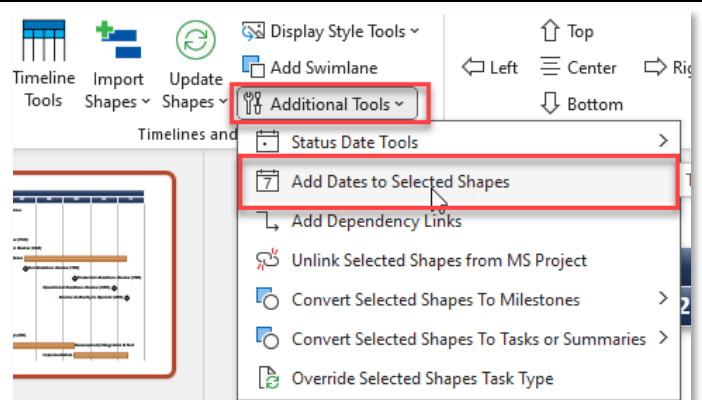
2. Expand rows 3 and 8, then select all the tasks from row 3 down.

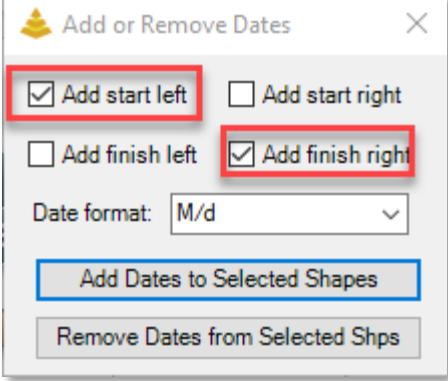


3. Navigate back to PowerPoint and open a blank slide. Then click the top half of the **Import Shapes** button in the **SSi Presentation Pro Ribbon**



4. Once the shapes have been imported onto the page, open the **Add or Remove Dates** form by clicking the **Add Dates to selected shapes** button in the **Additional Tools** menu. The **Additional Tools** menu can be found in the **Timelines and Tasks Group** of the **SSi Presentation Pro Ribbon**.

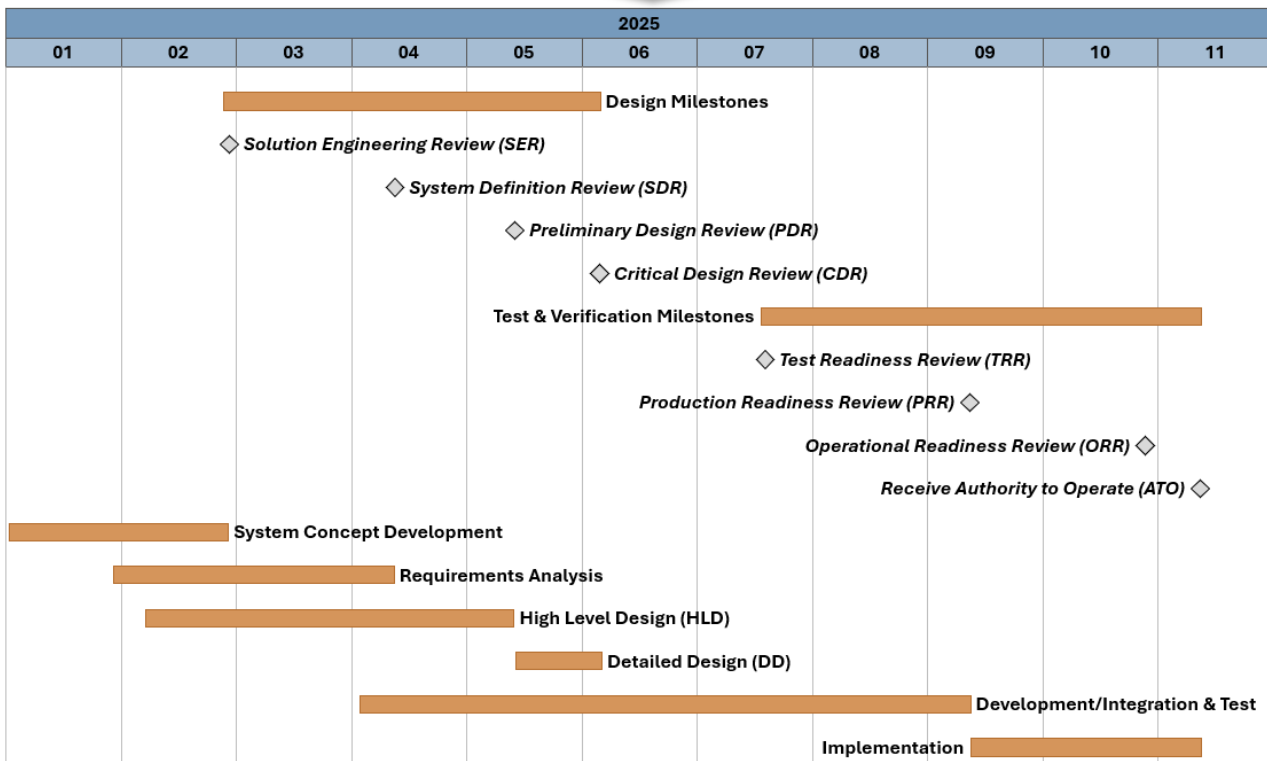


5. On the <i>Add or Remove Dates</i> form, chose the options to <i>Add start left</i> and <i>Add finish right</i>	
6. Select some shapes on the chart and then click the <i>Add Dates to Selected Shapes</i> button.	
7. Keep the same shapes selected and click <i>Remove Dates from Selected Shapes</i>.	
End of Practice Exercise	

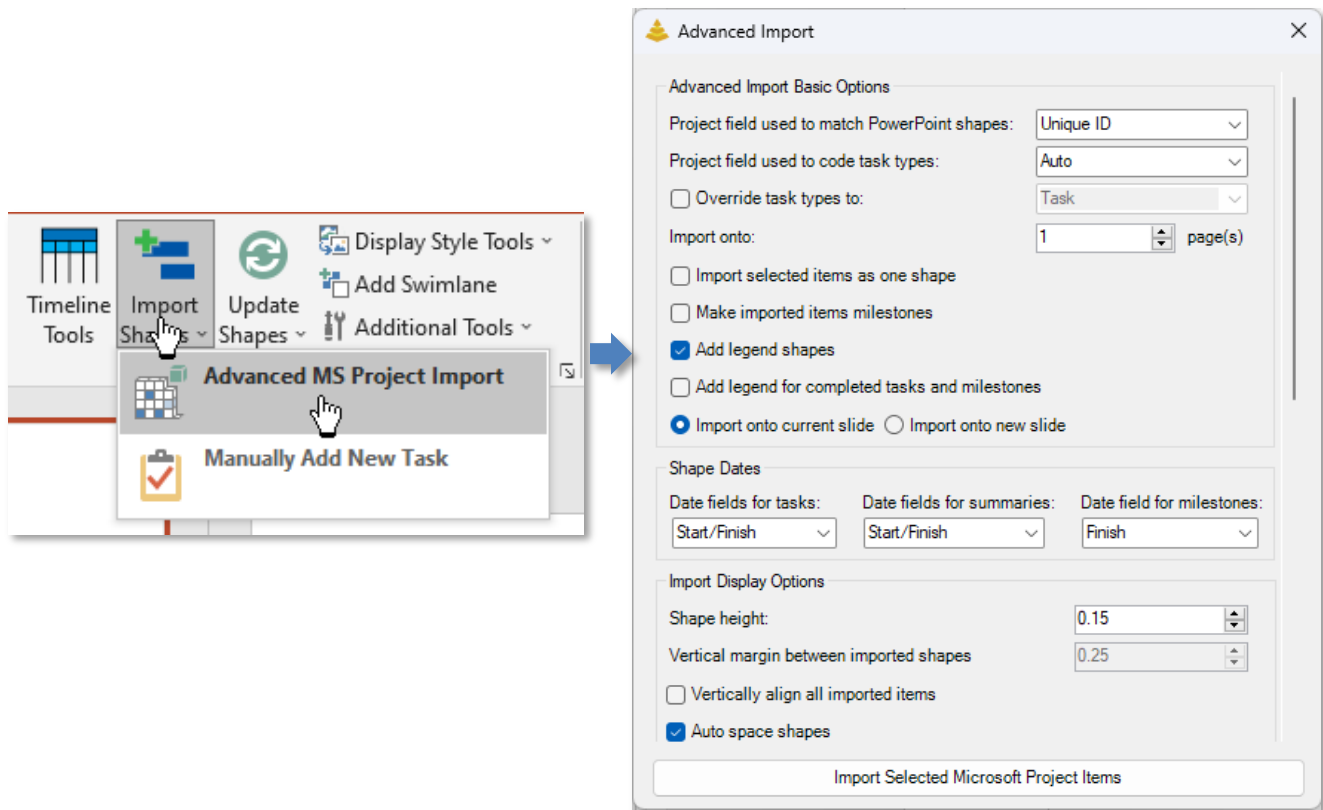
Controlling the Text of Imported Items

When activity shapes are imported from Microsoft Project, the text that is associated with the shapes by default will come from the *Name* field of the task.

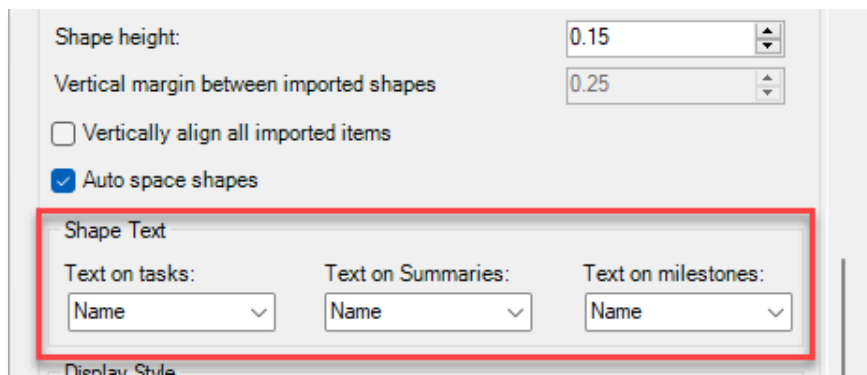
Task Name	Duration	Start	Finish
▾ Design Milestones	71 d	2/26/2025	6/5/2025
Solution Engineering Review (SER)	0 d	2/26/2025	2/26/2025
System Definition Review (SDR)	0 d	4/11/2025	4/11/2025
Preliminary Design Review (PDR)	0 d	5/13/2025	5/13/2025
Critical Design Review (CDR)	0 d	6/5/2025	6/5/2025
▾ Test & Verification Milestones	82 d	7/18/2025	11/11/2025
Test Readiness Review (TRR)	0 d	7/18/2025	7/18/2025
Production Readiness Review (PRR)	0 d	9/11/2025	9/11/2025
Operational Readiness Review (ORR)	0 d	10/28/2025	10/28/2025
Receive Authority to Operate (ATO)	0 d	11/11/2025	11/11/2025
▸ System Concept Development	40 d	1/2/2025	2/26/2025
▸ Requirements Analysis	52 d	1/30/2025	4/11/2025
▸ High Level Design (HLD)	68 d	2/7/2025	5/13/2025
▸ Detailed Design (DD)	17 d	5/14/2025	6/5/2025
▸ Development/Integration & Test	116 d	4/3/2025	9/11/2025
▸ Implementation	43 d	9/12/2025	11/11/2025



Presentation Pro has the ability to import activity shapes with text from a field other than Name. The field used can be set in the **Advanced Import form**. This form can be opened by clicking the lower half of the **Import Shapes** button in the Presentation Pro ribbon and then selecting the **Advanced MS Project Import** option in the menu:



You can control the text field that is used for imported activities by adjusting the selection in the **Shape Text Group** just over halfway down the form. Presentation Pro has the ability to use a separate field for the text on **Task**, **Summary**, and **Milestone** activity types, for example:

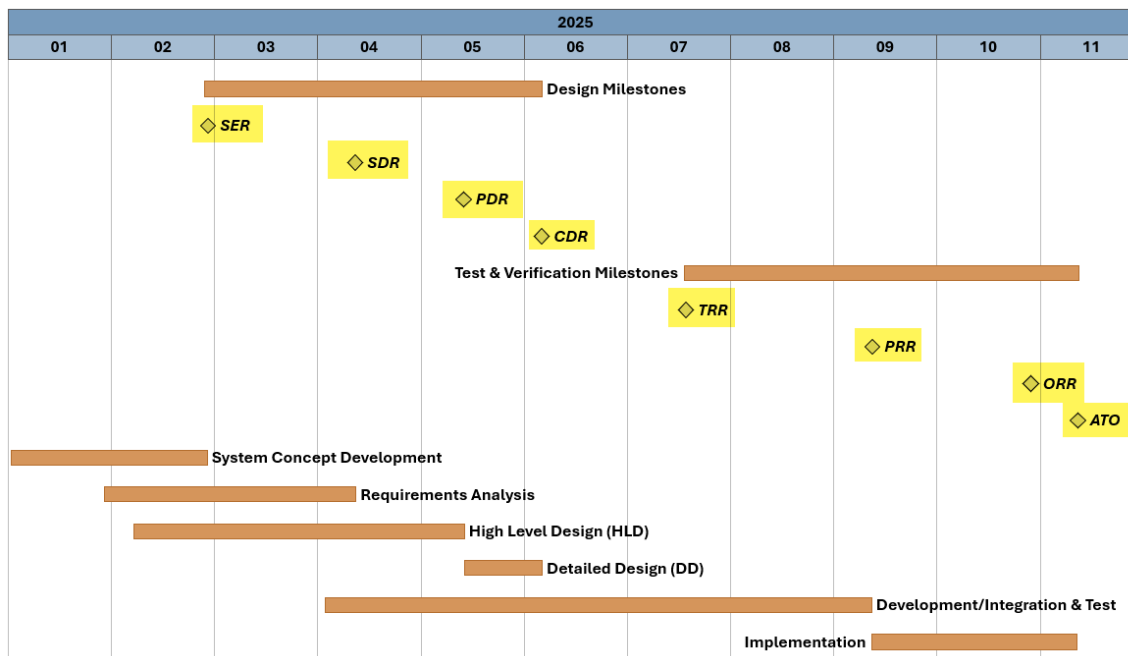


Observe the following images to see how Text20 is used for Milestone activities:

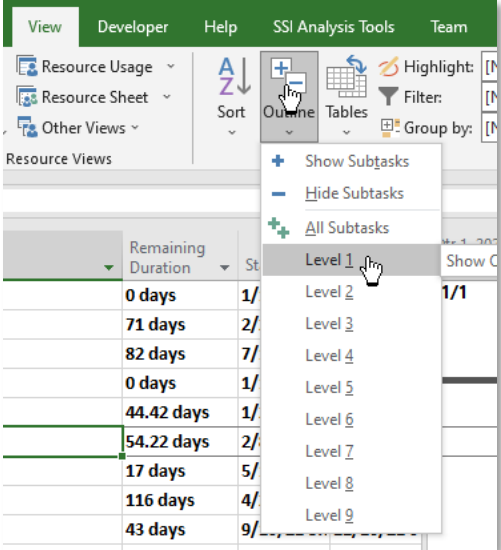
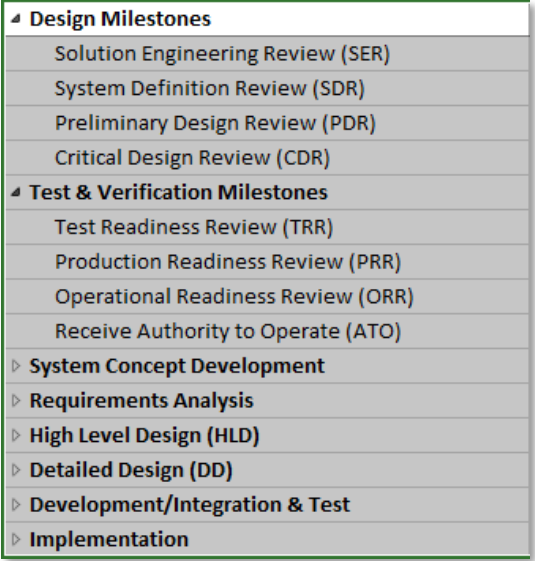
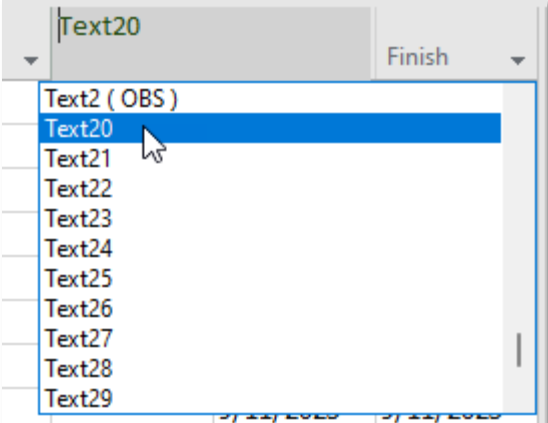
Shape Text

Text on tasks: Text on Summaries: Text on milestones:

Task Name	Text20	Start	Finish
Design Milestones		2/26/2025	6/5/2025
Solution Engineering Review (SER)	SER	2/26/2025	2/26/2025
System Definition Review (SDR)	SDR	4/11/2025	4/11/2025
Preliminary Design Review (PDR)	PDR	5/13/2025	5/13/2025
Critical Design Review (CDR)	CDR	6/5/2025	6/5/2025
Test & Verification Milestones		7/18/2025	11/11/2025
Test Readiness Review (TRR)	TRR	7/18/2025	7/18/2025
Production Readiness Review (PRR)	PRR	9/11/2025	9/11/2025
Operational Readiness Review (ORR)	ORR	10/28/2025	10/28/2025
Receive Authority to Operate (ATO)	ATO	11/11/2025	11/11/2025
System Concept Development		1/2/2025	2/26/2025
Requirements Analysis		1/30/2025	4/11/2025
High Level Design (HLD)		2/7/2025	5/13/2025
Detailed Design (DD)		5/14/2025	6/5/2025
Development/Integration & Test		4/3/2025	9/11/2025
Implementation		9/12/2025	11/11/2025



Class Exercise – Importing Activities with a Different Text Field

Start of Practice Exercise	
1. Open the SSi Example Project file and set the outline level to level 1	
2. Expand rows 3 and 8.	
3. Insert the <i>Text20</i> column into the Gantt Table.	

4. In the Text20 field, abbreviate the names of the **Design Milestones** and **Test & Verification Milestones** like shown in the image to the right ->

Task Name	Text20
Design Milestones	
Solution Engineering Review (SER)	SER
System Definition Review (SDR)	SDR
Preliminary Design Review (PDR)	PDR
Critical Design Review (CDR)	CDR
Test & Verification Milestones	
Test Readiness Review (TRR)	TRR
Production Readiness Review (PRR)	PRR
Operational Readiness Review (ORR)	ORR
Receive Authority to Operate (ATO)	ATO
System Concept Development	
Requirements Analysis	

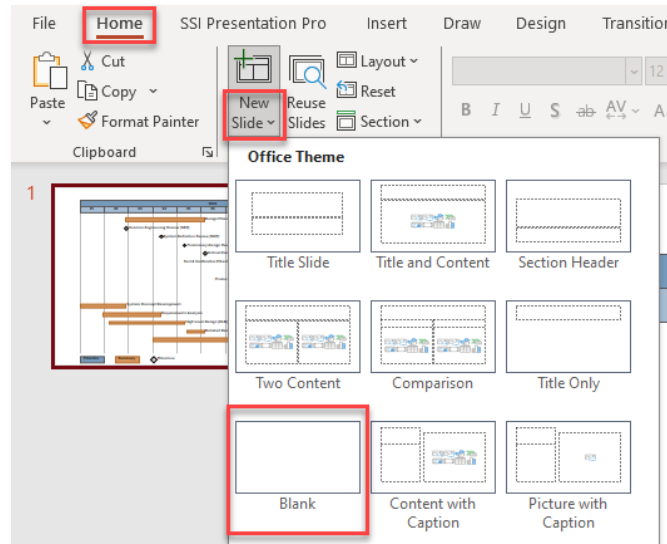
5. Select all activities from row 3 down as shown in the image:

	Task Name	Text20	Start	Finish
3	Design Milestones		2/26/2025	6/5/2025
4	Solution Engineering Review (SER)	SER	2/26/2025	2/26/2025
5	System Definition Review (SDR)	SDR	4/11/2025	4/11/2025
6	Preliminary Design Review (PDR)	PDR	5/13/2025	5/13/2025
7	Critical Design Review (CDR)	CDR	6/5/2025	6/5/2025
8	Test & Verification Milestones		7/18/2025	11/11/2025
9	Test Readiness Review (TRR)	TRR	7/18/2025	7/18/2025
10	Production Readiness Review (PRR)	PRR	9/11/2025	9/11/2025
11	Operational Readiness Review (ORR)	ORR	10/28/2025	10/28/2025
12	Receive Authority to Operate (ATO)	ATO	11/11/2025	11/11/2025
13	System Concept Development		1/2/2025	2/26/2025
26	Requirements Analysis		1/30/2025	4/11/2025
53	High Level Design (HLD)		2/7/2025	5/13/2025
63	Detailed Design (DD)		5/14/2025	6/5/2025
74	Development/Integration & Test		4/3/2025	9/11/2025
96	Implementation		9/12/2025	11/11/2025

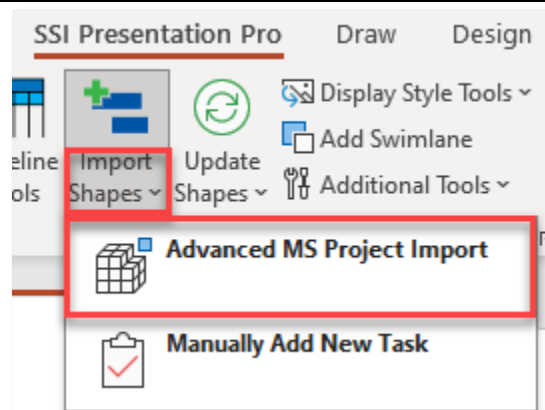
6. Navigate back to PowerPoint



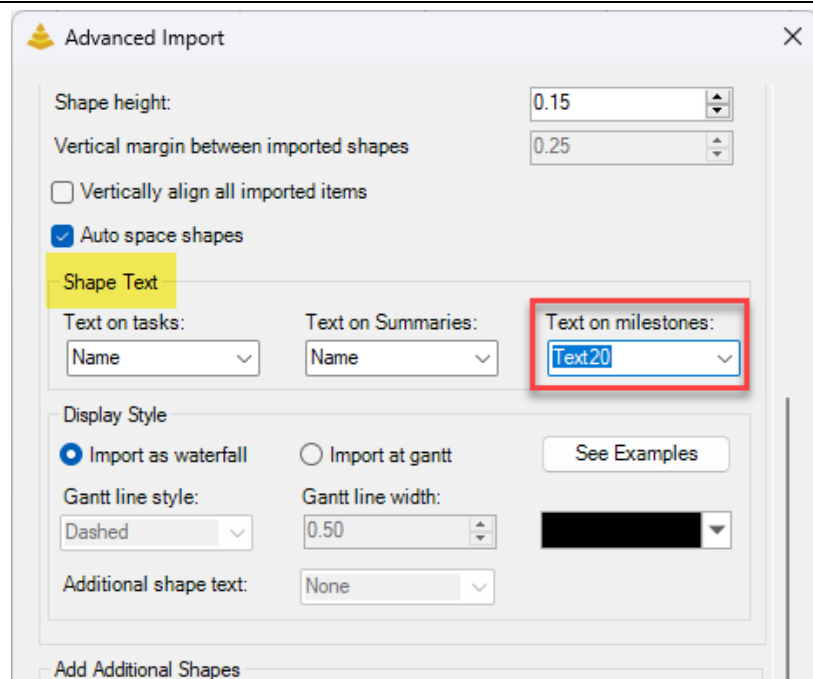
7. In a new presentation or the presentation from the previous exercises, add a new blank slide.



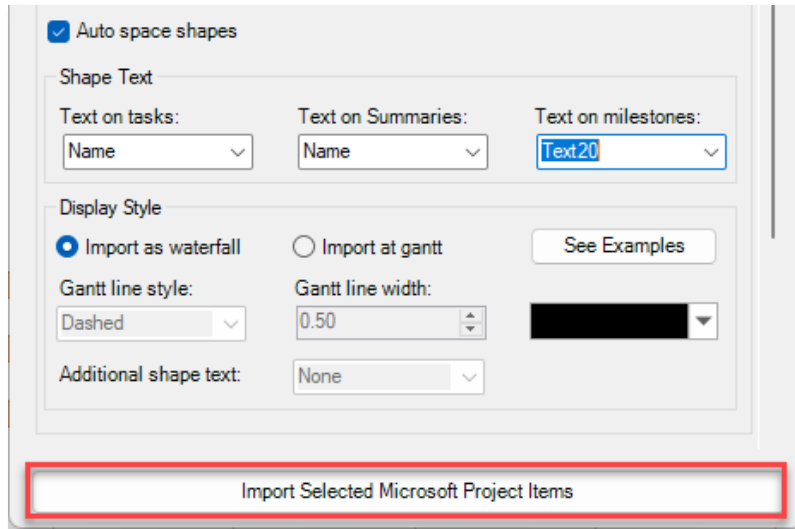
8. In the *SSi Presentation Pro Ribbon*, click the lower half of the *Import Shapes* button and select the *Advanced MS Project Import* option to open the *Advanced Import form*.



9. Scroll down on the form to find the *Shape Text* group. Set the *Text on milestones* selection to *Text20*.



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



☒ Auto space shapes

Shape Text

Text on tasks: Name Text on Summaries: Name Text on milestones: Text20

Display Style

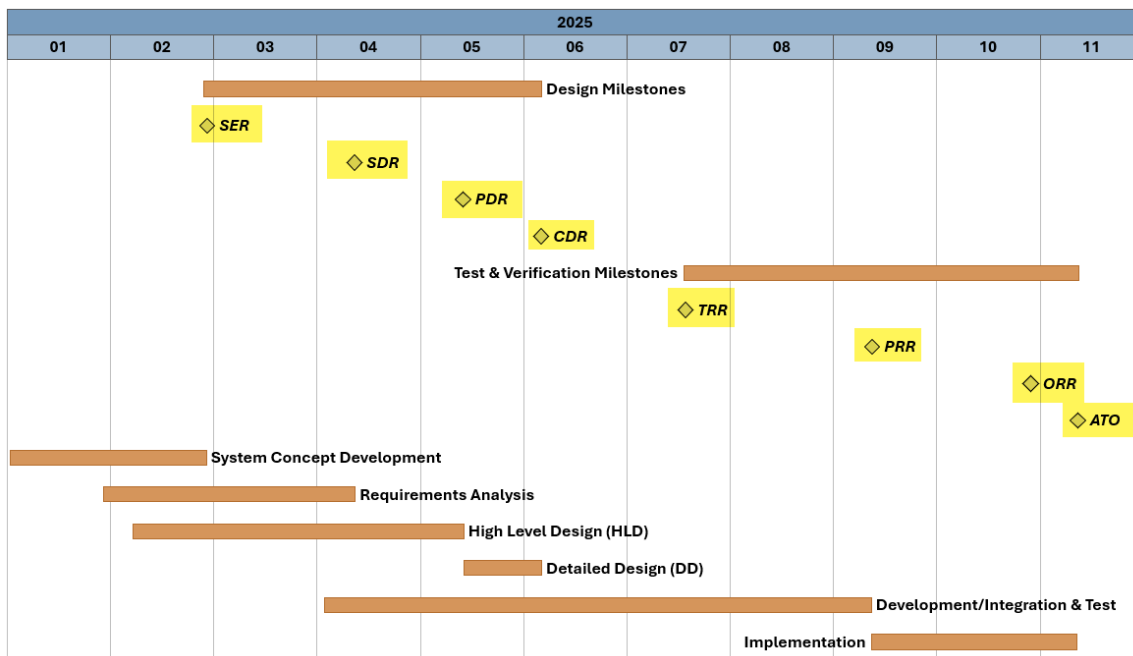
☒ Import as waterfall ☐ Import at gantt See Examples

Gantt line style: Dashed Gantt line width: 0.50

Additional shape text: None

Import Selected Microsoft Project Items

11. Observe the chart created:

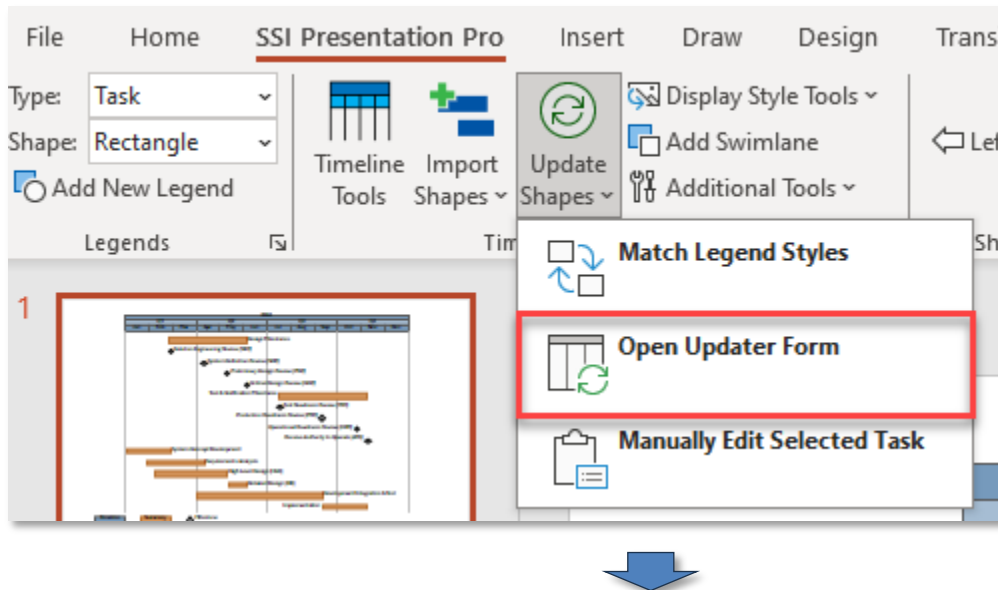


End of Practice Exercise

Updating the Text of Existing Shapes on a Chart

By default, when Presentation Pro synchronizes shapes on a chart with the current data in Microsoft Project, it updates only the shapes' coded Start and Finish dates and adjusts their horizontal position on the timeline accordingly. It does **not** modify the text on the shapes unless explicitly instructed to do so.

You can instruct Presentation Pro to update the text of activity shapes on an existing chart to specific text fields in Microsoft Project by using the **Updater form**. To open the **Updater form**, click the **Lower half** of the **Update Shapes** button and choose the **Open Updater Form** option:




Update Shape Dates
✕

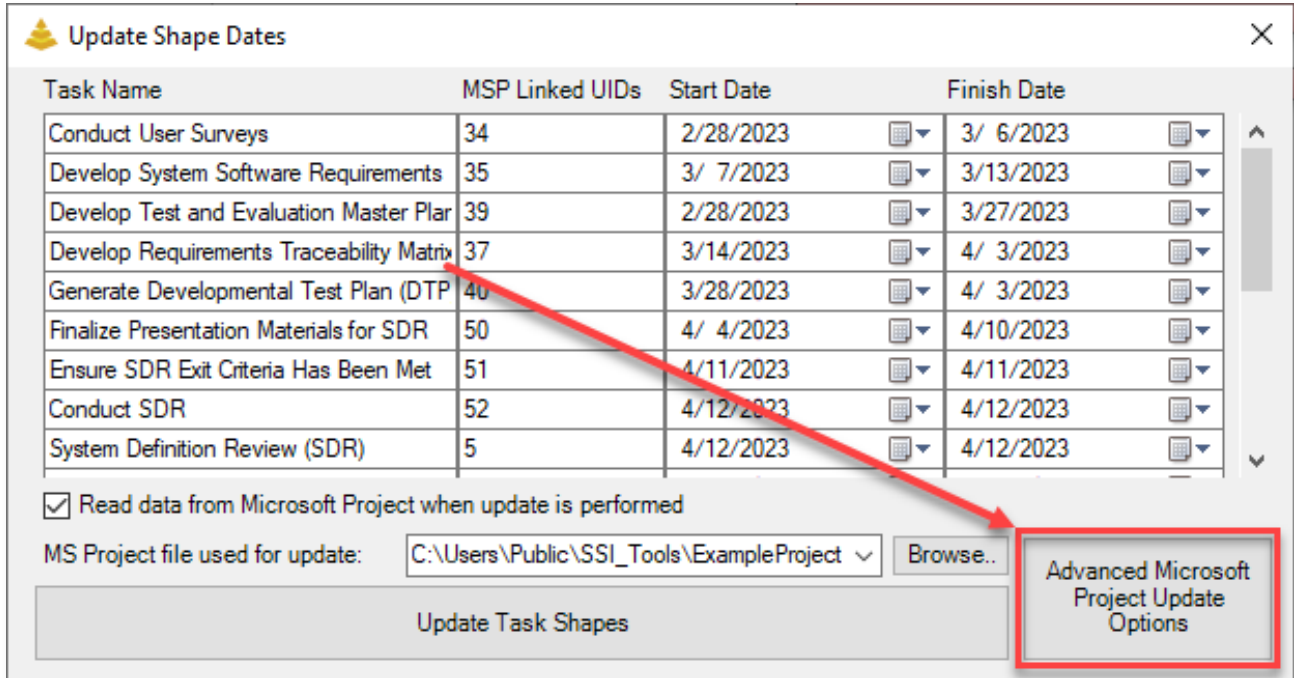
Task Name	MSP Linked UIDs	Start Date		Finish Date	
Design Milestones	3	2/26/2024	▼	6/28/2024	▼
Solution Engineering Review (SER)	4	2/26/2024	▼	2/26/2024	▼
System Definition Review (SDR)	5	4/10/2024	▼	4/10/2024	▼
Preliminary Design Review (PDR)	6	6/ 6/2024	▼	6/ 6/2024	▼
Critical Design Review (CDR)	7	6/28/2024	▼	6/28/2024	▼
Test & Verification Milestones	8	8/ 6/2024	▼	11/28/2024	▼
Test Readiness Review (TRR)	9	8/ 6/2024	▼	8/ 6/2024	▼
Production Readiness Review (PRR)	10	9/30/2024	▼	9/30/2024	▼
Operational Readiness Review (ORR)	11	11/14/2024	▼	11/14/2024	▼

☒ 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

Once the *Updater form* has been opened, click the *Advanced Microsoft Project Update Options* button to open the *Advanced Microsoft Project Update Options* dialog. The options to update text can be seen in the lower left side of this dialog



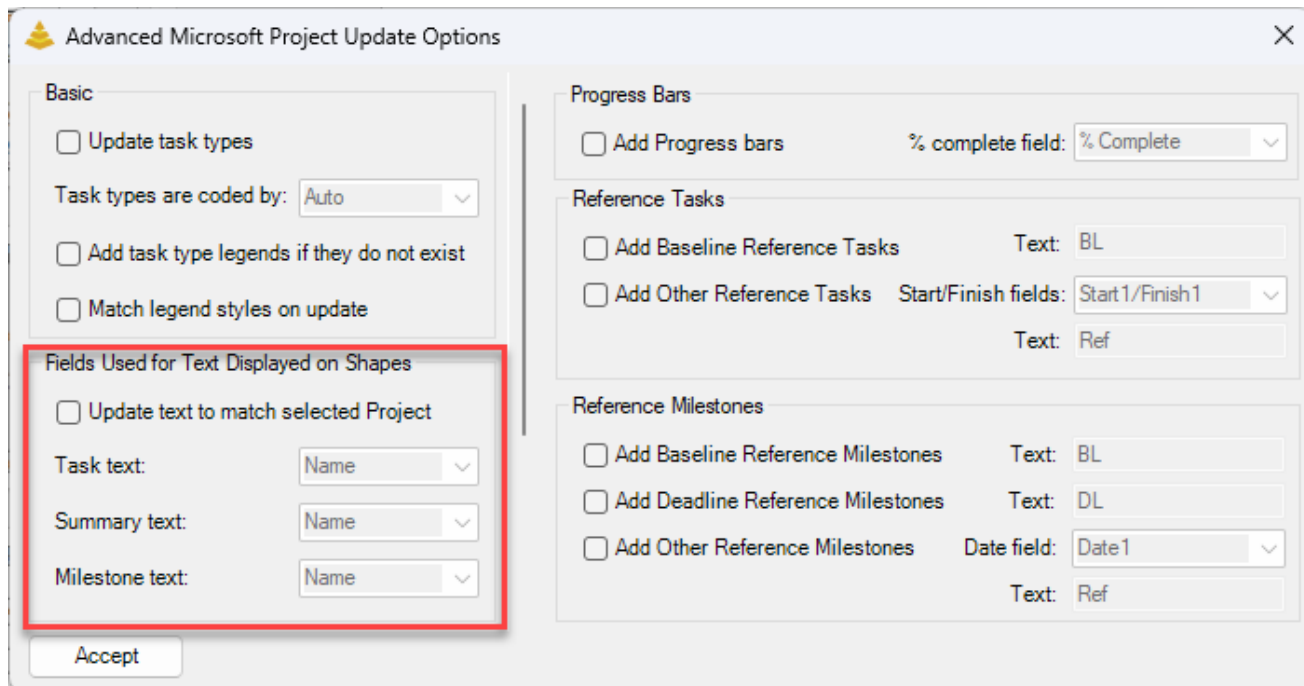
Task Name	MSP Linked UIDs	Start Date	Finish Date
Conduct User Surveys	34	2/28/2023	3/ 6/2023
Develop System Software Requirements	35	3/ 7/2023	3/13/2023
Develop Test and Evaluation Master Plan	39	2/28/2023	3/27/2023
Develop Requirements Traceability Matrix	37	3/14/2023	4/ 3/2023
Generate Developmental 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

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

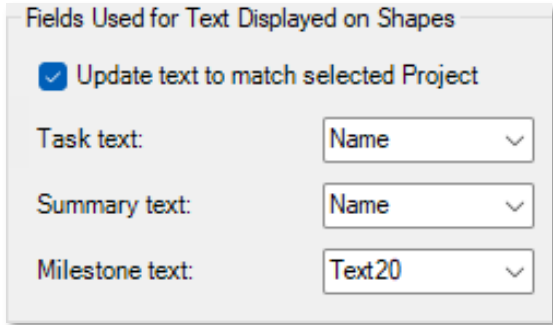
Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

☐ Add Deadline Reference Milestones Text: DL

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

Check the option to **Update text to match selected Project** to enable the drop-down controls. You can choose from various task fields in Microsoft Project to pull text from. Presentation Pro has the ability to use a separate field for the text on **Task**, **Summary**, and **Milestone** activity types.



Fields Used for Text Displayed on Shapes

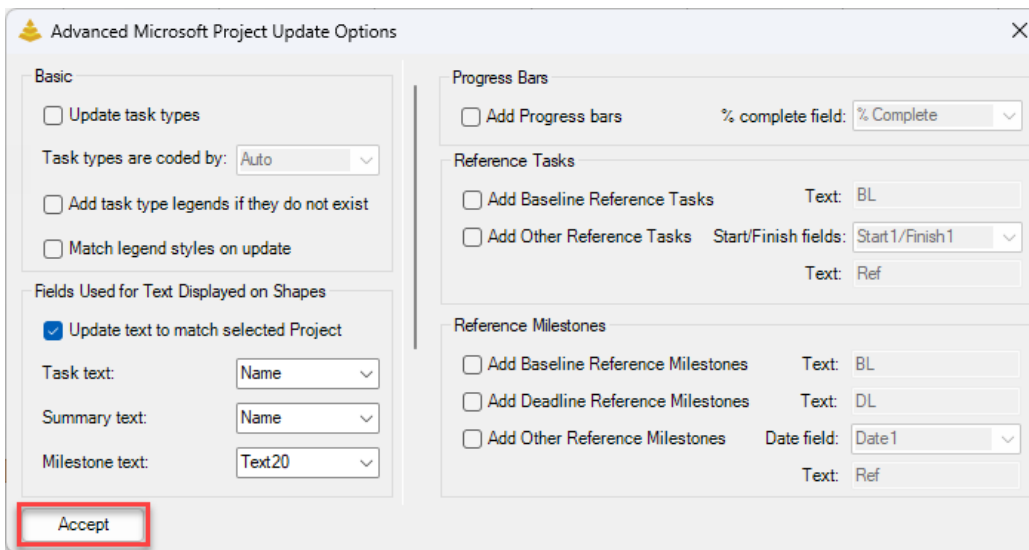
☒ Update text to match selected Project

Task text:

Summary text:

Milestone text:

Once you are satisfied with your selections, click the accept button in the bottom-left corner of the dialog:



Advanced Microsoft Project Update Options

Basic

☐ Update task types

Task types are coded by:

☐ 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:

Summary text:

Milestone text:

Accept

Progress Bars

☐ Add Progress bars % complete field:

Reference Tasks

☐ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields:

Text:

Reference Milestones

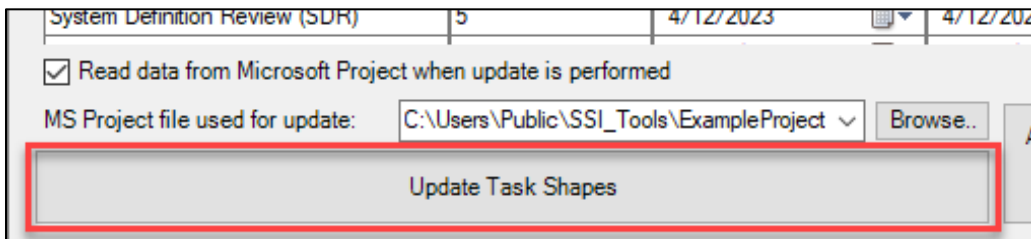
☐ Add Baseline Reference Milestones Text:

☐ Add Deadline Reference Milestones Text:

☐ Add Other Reference Milestones Date field:

Text:

This will close the dialog. Back on the **Updater form**, click the **Update Task Shapes** button to begin the process of synchronizing the chart with the selected Microsoft Project file. During this process, in addition to adjusting the Start and Finish dates of shapes, the text of shapes will be updated to the current values in the fields selected.



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:

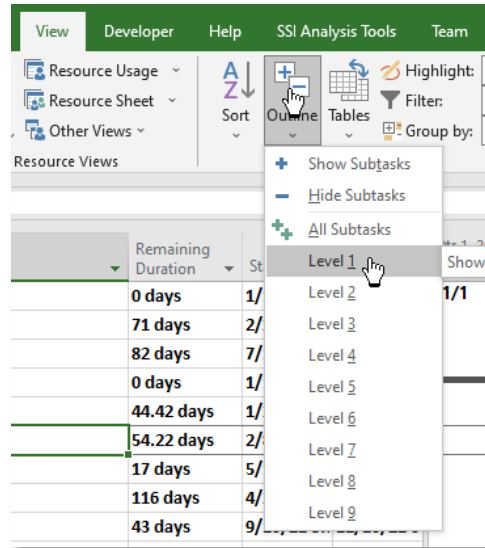
Update Task Shapes

Class Exercise – Updating Text on an Existing Chart

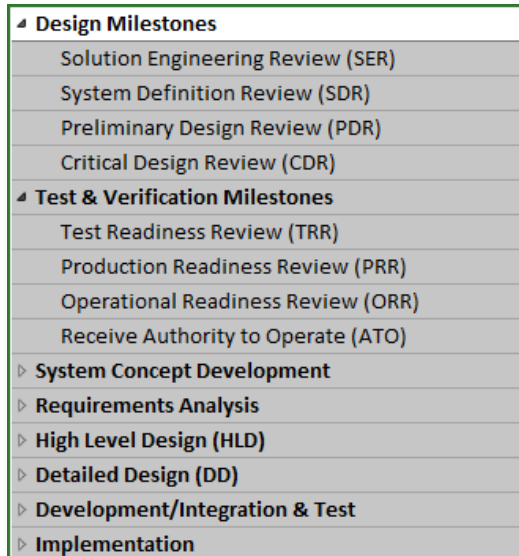
Start of Practice Exercise

1. Goto step 6 if you still have the Example Project open from the previous exercise

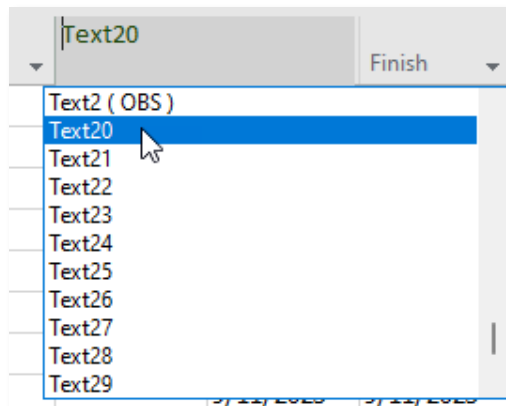
2. Goto Step
Open the [SSI Example Project file](#)
and set the
outline level to
level 1



3. Expand rows 3
and 8.



4. Insert the
Text20 column
into the Gantt
Table.



5. In the Text20 field, abbreviate the names of the **Design Milestones** and **Test & Verification Milestones** as shown in the image to the right ->

Task Name	Text20
Design Milestones	
Solution Engineering Review (SER)	SER
System Definition Review (SDR)	SDR
Preliminary Design Review (PDR)	PDR
Critical Design Review (CDR)	CDR
Test & Verification Milestones	
Test Readiness Review (TRR)	TRR
Production Readiness Review (PRR)	PRR
Operational Readiness Review (ORR)	ORR
Receive Authority to Operate (ATO)	ATO
System Concept Development	
Requirements Analysis	

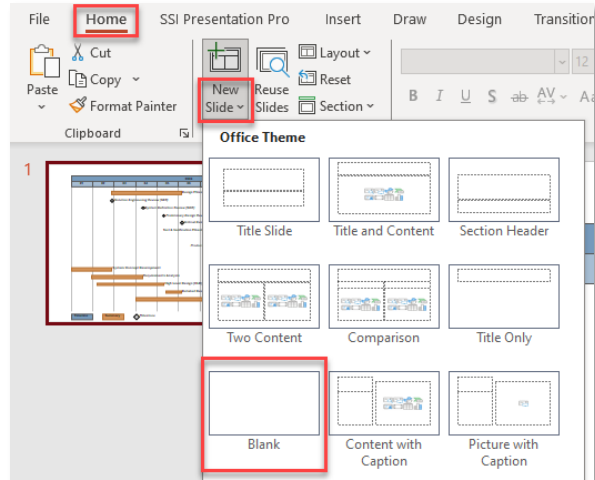
6. Select all activities from row 3 down as shown in the image:

	Task Name	Text20	Start	Finish
3	Design Milestones		2/26/2025	6/5/2025
4	Solution Engineering Review (SER)	SER	2/26/2025	2/26/2025
5	System Definition Review (SDR)	SDR	4/11/2025	4/11/2025
6	Preliminary Design Review (PDR)	PDR	5/13/2025	5/13/2025
7	Critical Design Review (CDR)	CDR	6/5/2025	6/5/2025
8	Test & Verification Milestones		7/18/2025	11/11/2025
9	Test Readiness Review (TRR)	TRR	7/18/2025	7/18/2025
10	Production Readiness Review (PRR)	PRR	9/11/2025	9/11/2025
11	Operational Readiness Review (ORR)	ORR	10/28/2025	10/28/2025
12	Receive Authority to Operate (ATO)	ATO	11/11/2025	11/11/2025
13	System Concept Development		1/2/2025	2/26/2025
26	Requirements Analysis		1/30/2025	4/11/2025
53	High Level Design (HLD)		2/7/2025	5/13/2025
63	Detailed Design (DD)		5/14/2025	6/5/2025
74	Development/Integration & Test		4/3/2025	9/11/2025
96	Implementation		9/12/2025	11/11/2025

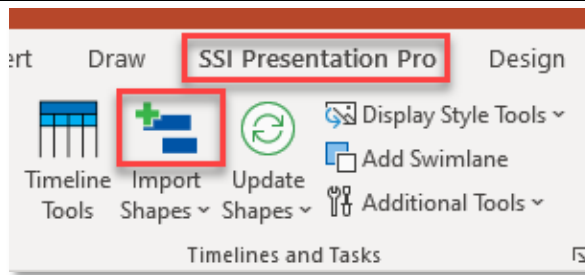
7. Navigate back to PowerPoint



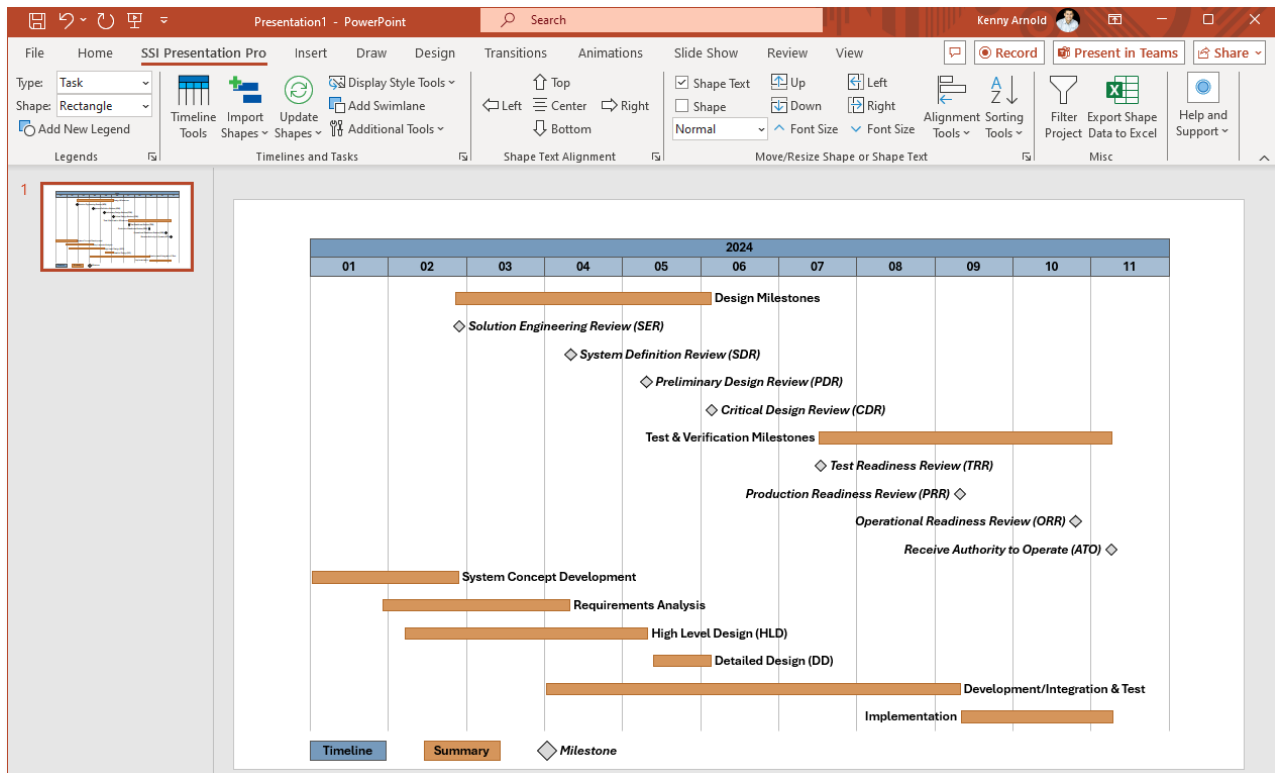
8. In a new presentation or the presentation from the previous exercises, add a new blank slide.



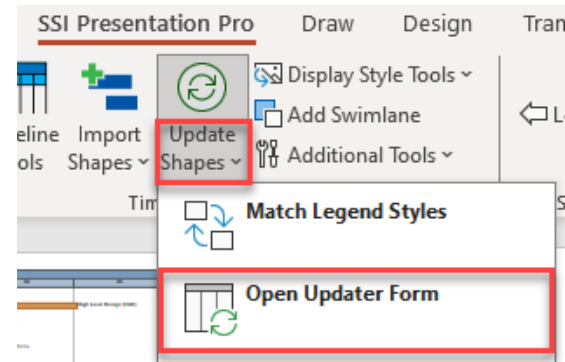
9. Click the top half of the **Import Shapes** button in the **SSI Presentation Pro Ribbon**.



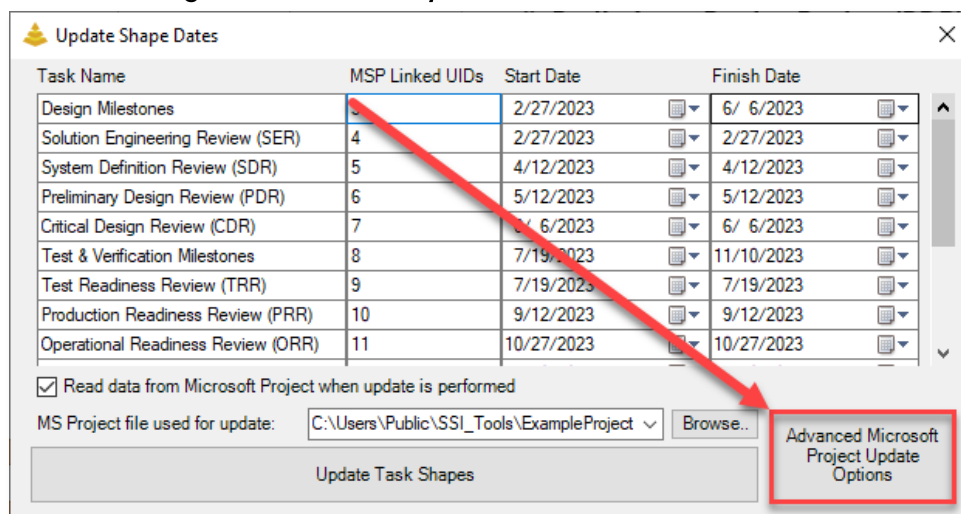
10. the output should look like the following:



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.



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



Task Name	MSP Linked UIDs	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

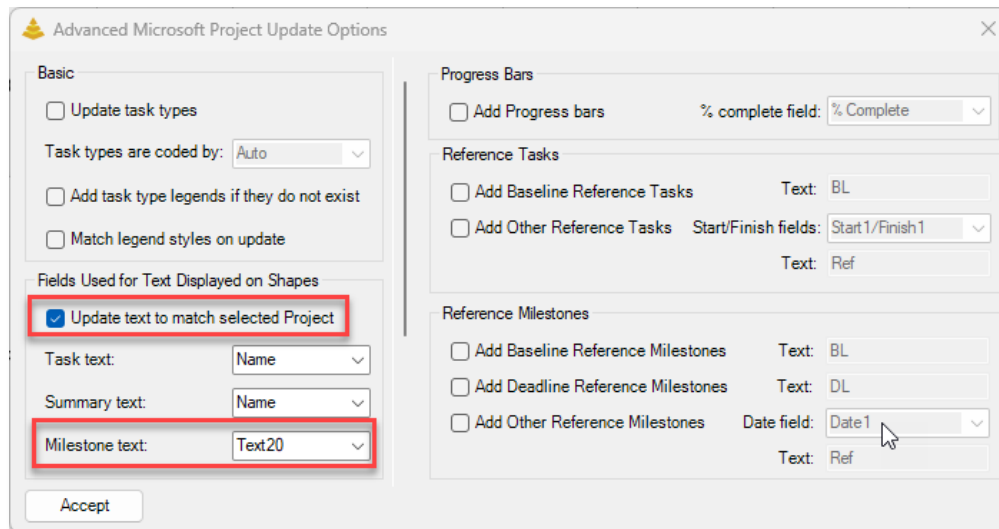
☒ Read data from Microsoft Project when update is performed

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

Update Task Shapes

Advanced Microsoft Project Update Options

13. 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: Text20

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

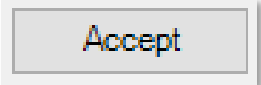
Reference Milestones

☐ Add Baseline Reference Milestones Text: BL

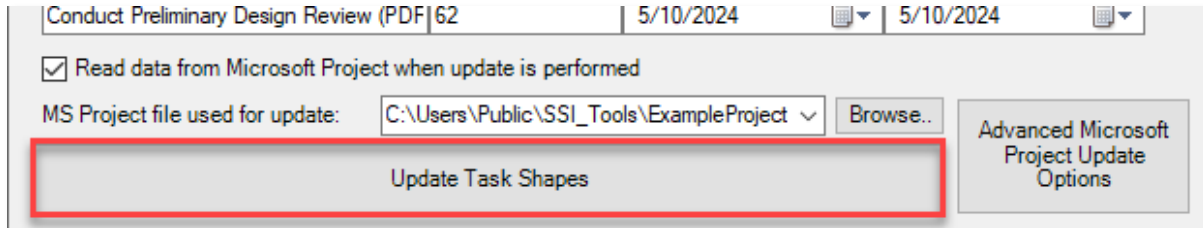
☒ Add Deadline Reference Milestones Text: DL

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

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



15. Back on the *Updater Form*, ensure the *MS Project file used for Update* is set to the Example Project, then click the *Update Task Shapes* button.



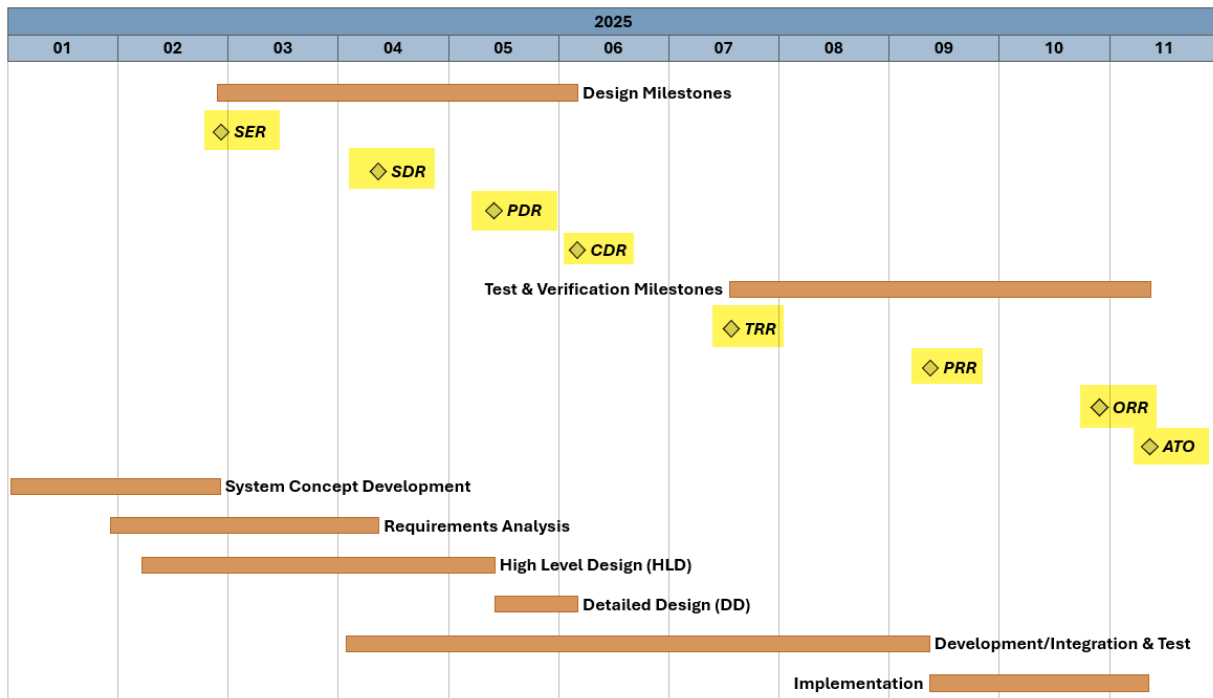
Conduct Preliminary Design Review (PDF) 62 | 5/10/2024 | 5/10/2024

☒ Read data from Microsoft Project when update is performed

MS Project file used for update: C:\Users\Public\SSi_Tools\ExampleProject

Update Task Shapes Advanced Microsoft Project Update Options

16. Observe the updated chart:



End of Practice Exercise