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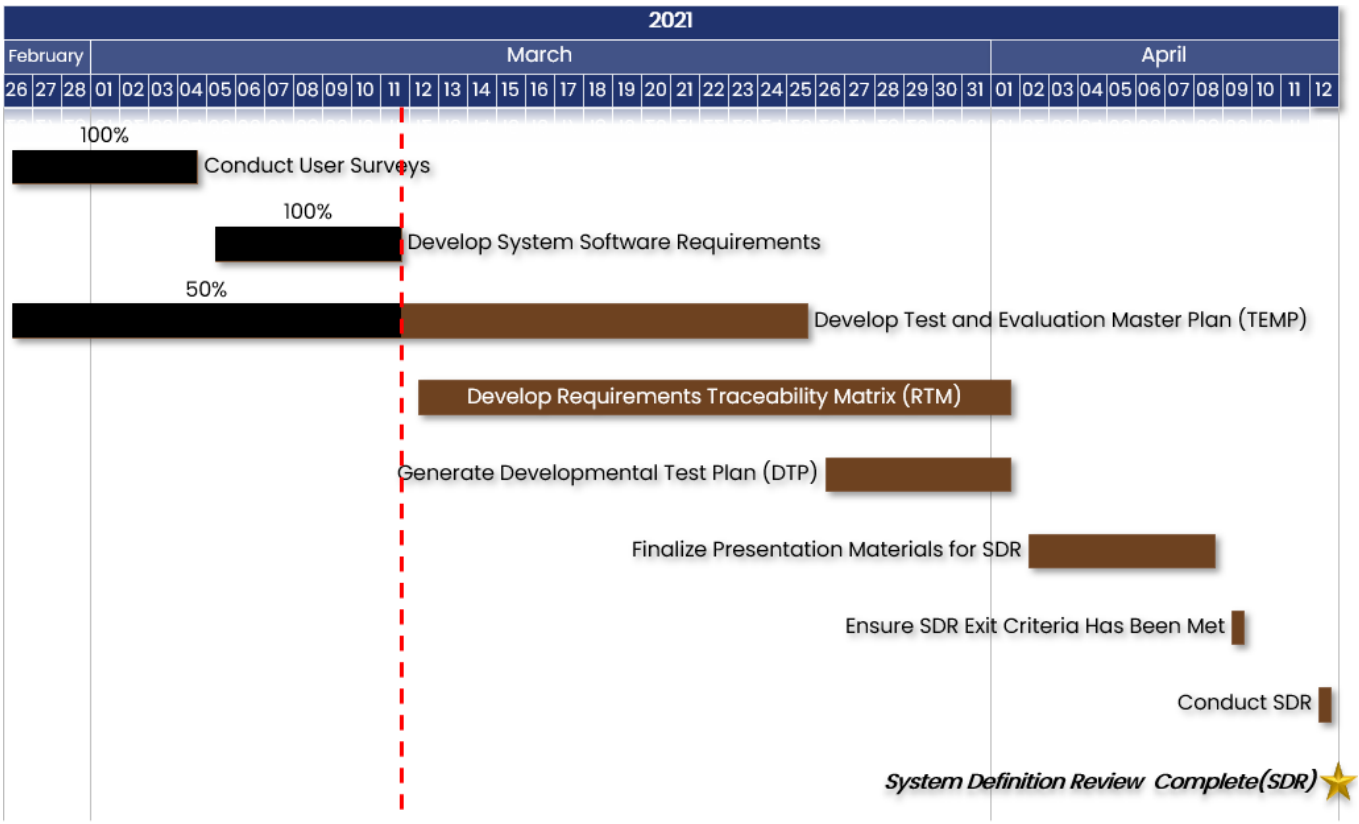
Presentation Pro – Showing Progress on a chart

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 the ways you can show progress on your Presentation Professional chart, including:

- How to use "Complete" legends
- How to show progress bars on activities
- How to use the status date tools



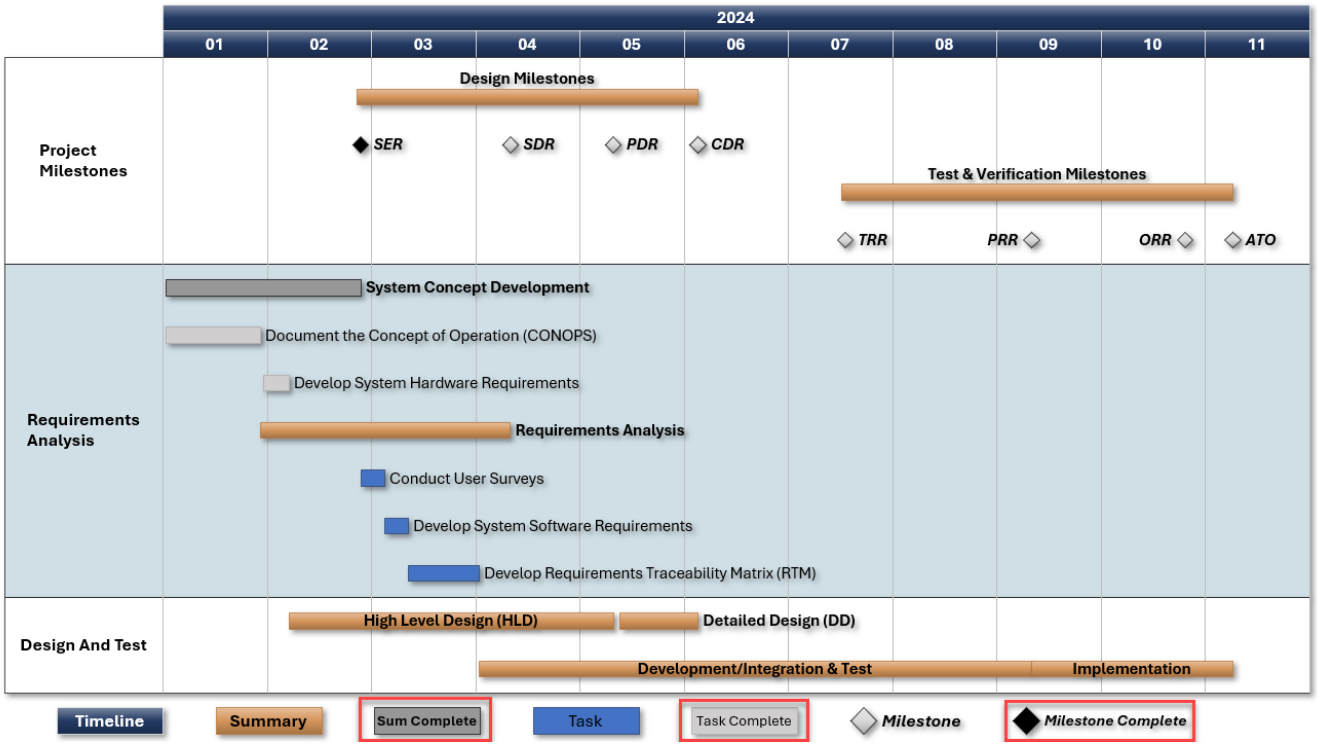
Showing Progress

Audiences often want to see the percentage of task completion directly on schedule charts. Presentation Pro allows you to display task progress in two ways:

1. By using “complete” legends
2. By adding progress bar shapes on top of task shapes

Using “Complete” Legends

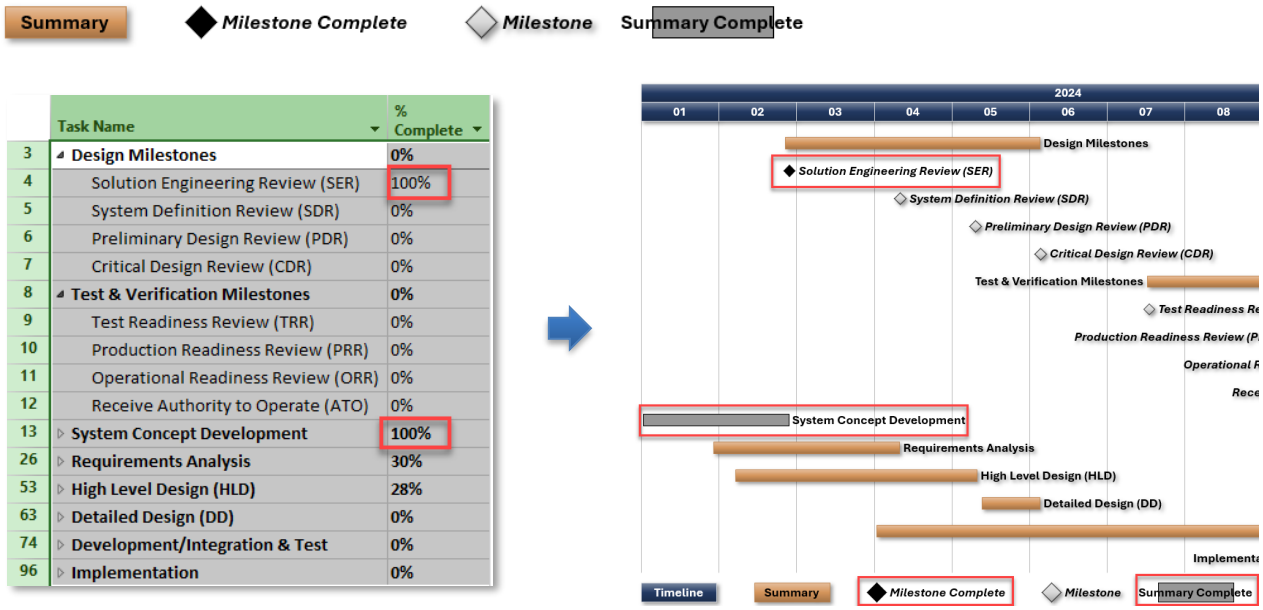
Out of the box, Presentation Pro offers legend types for "Task," "Summary," and "Milestone," which can represent any task, summary, or milestone from Microsoft Project. In addition, Presentation Pro includes legend types called ***Task Complete***, ***Summary Complete***, and ***Milestone Complete***. Adding these "Complete" legends to a slide enables you to distinguish between complete and non-complete activities.



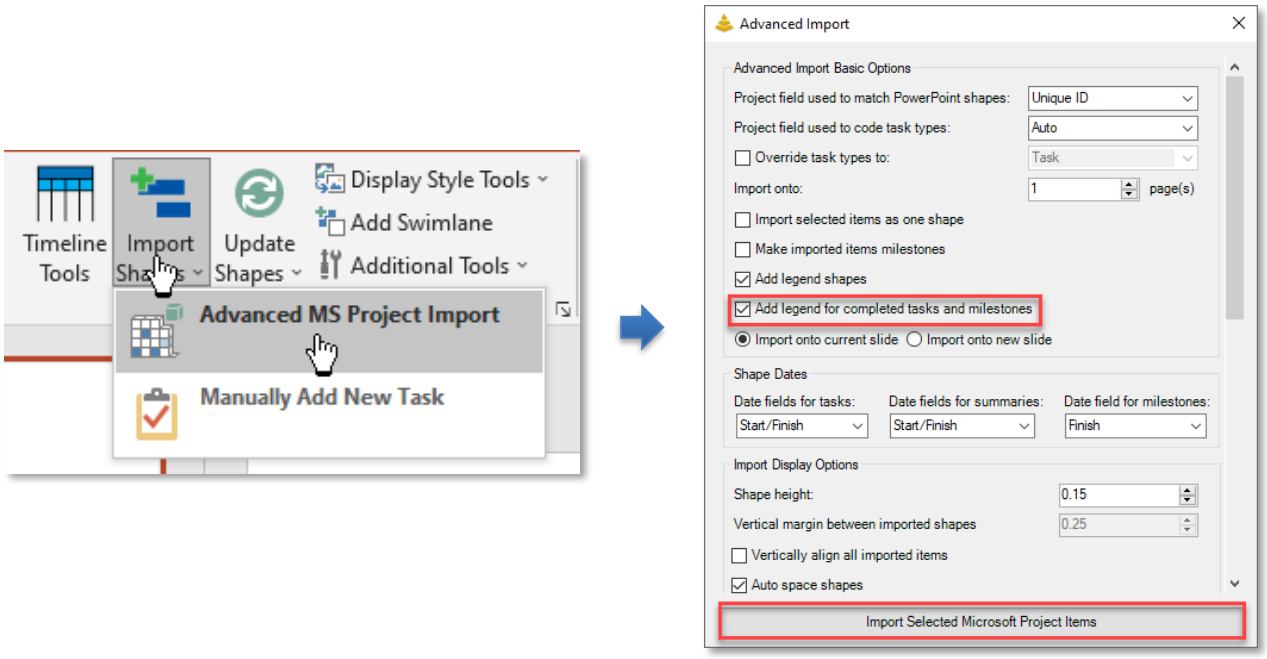
You can have Presentation Pro distinguish between complete and non-complete items before or after you import content onto your chart.

On Import

If any of the "Complete" legends are present on the slide when items are imported from Microsoft Project, Presentation Pro will automatically recognize the need to distinguish between completed and non-completed items and code them accordingly. Activities that are 100% complete in Microsoft Project will be coded as completed items and will follow the style of the corresponding "Complete" legend.

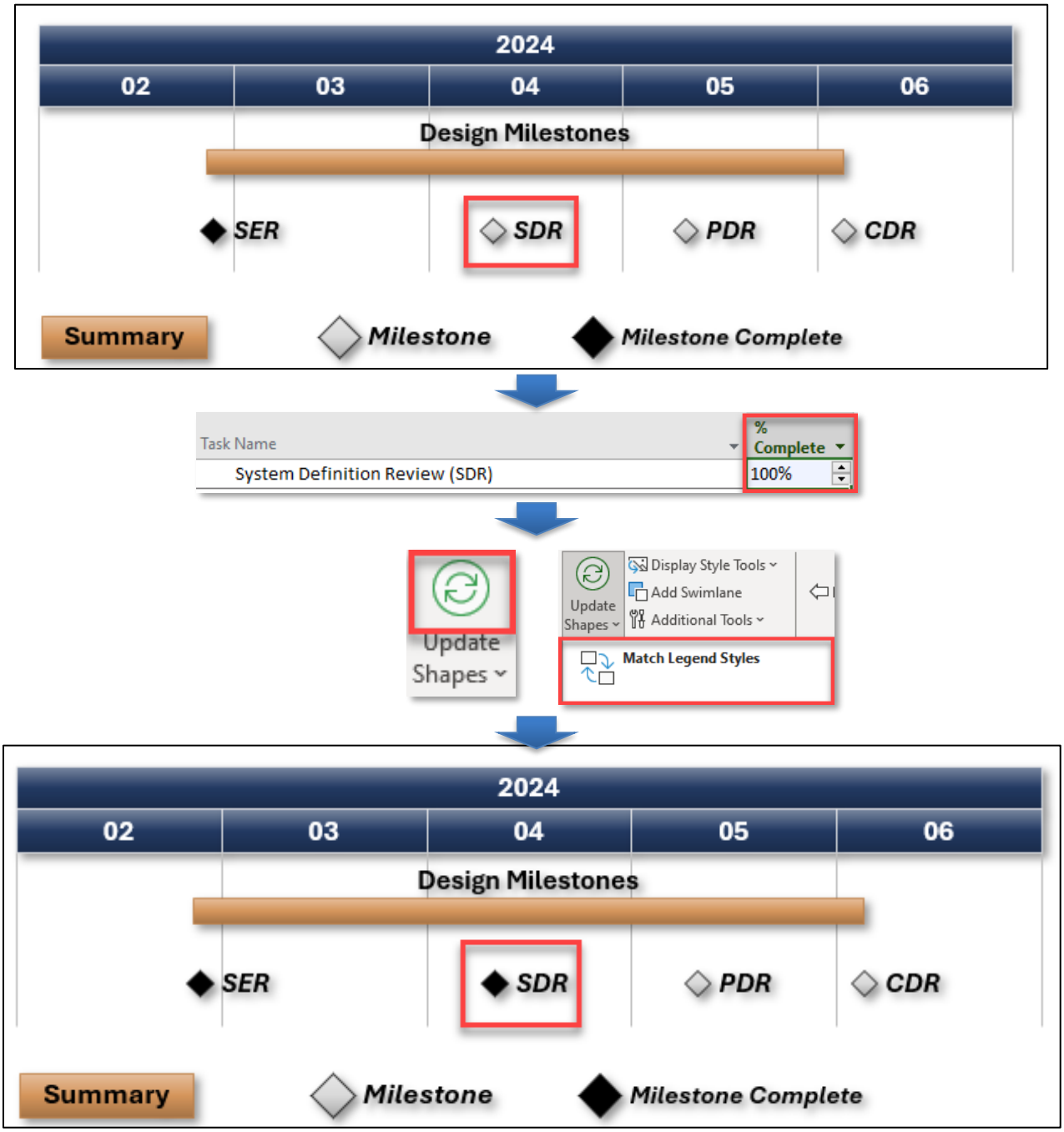


"Complete legends can be added to a slide automatically when content is imported from Microsoft Project by checking the ***Add legend for completed tasks and milestones*** option on the ***Advanced Importer form***.

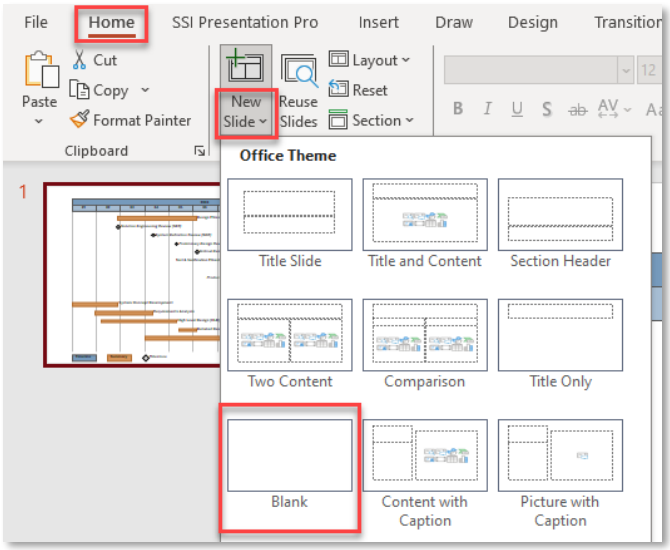
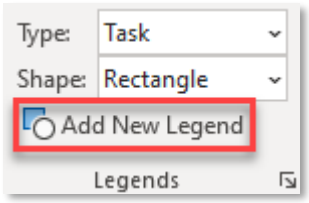
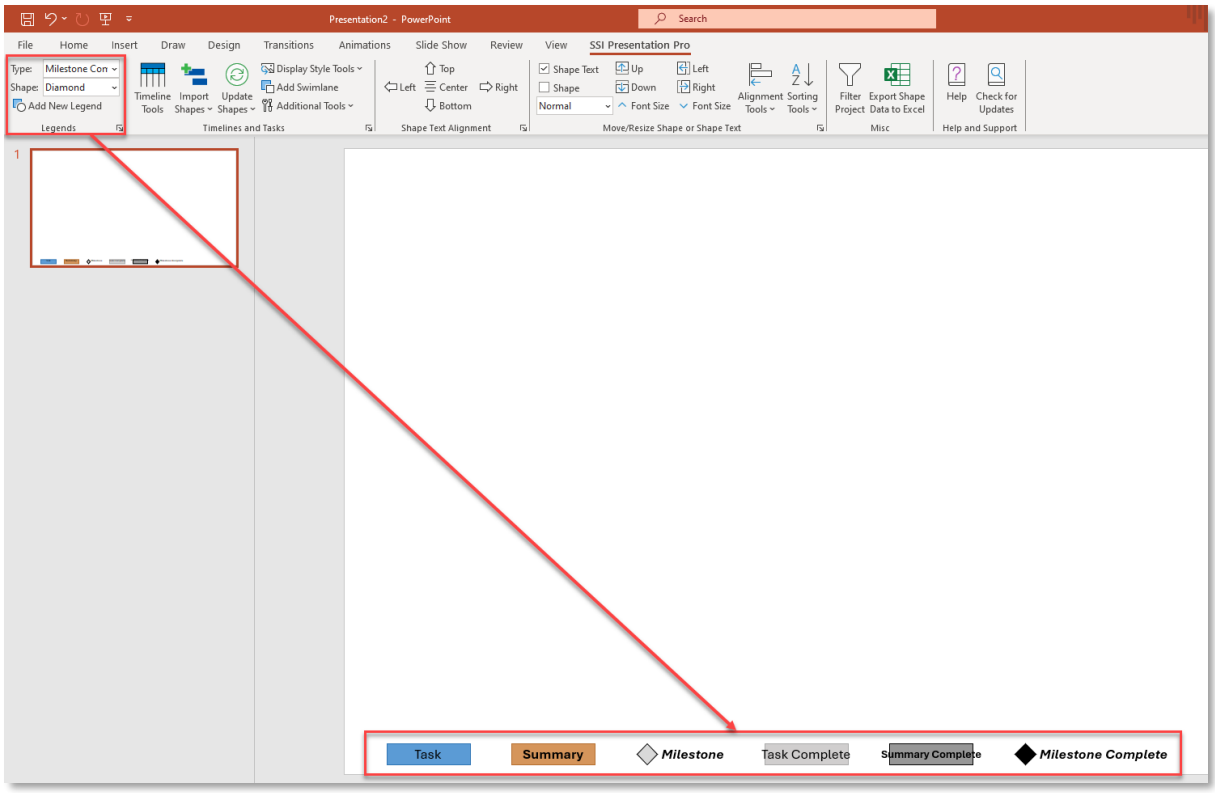


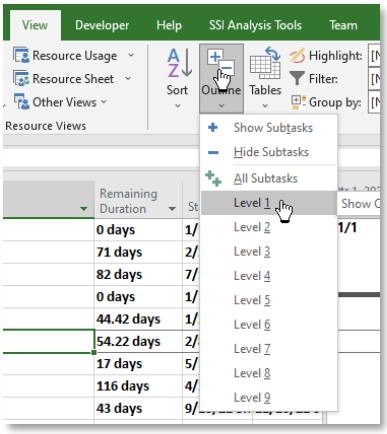
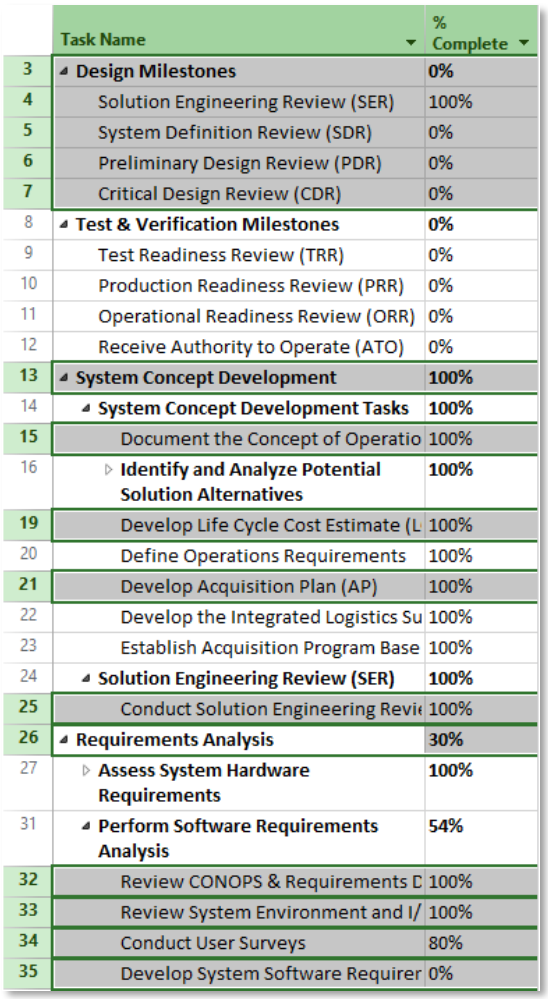
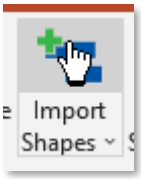
On Update

If "Complete" legends are present on the slide when the ***Update*** function is performed (synchronizing the chart with the real data in Microsoft Project), Presentation Pro will automatically recognize the need to differentiate between completed and non-completed items and code them accordingly. Activities that are 100% complete in Microsoft Project will be coded as completed items when the update occurs. Afterward, you'll need to use the ***Match Legend Styles*** function to ensure that the newly coded completed items follow the appropriate "Complete" legend style. Observe the images below:



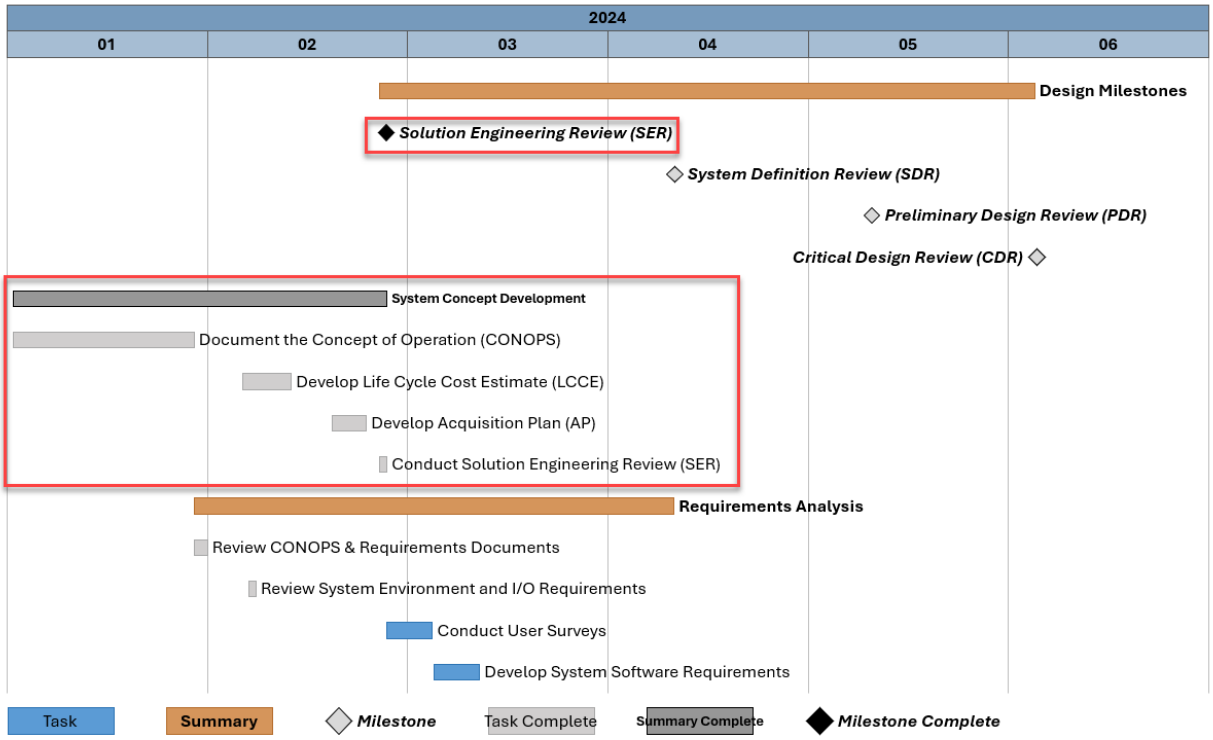
Class Exercise – Using "Complete" Legends

Start of Practice Exercise	
1. In PowerPoint, add a new blank slide.	
2. Use the ***Legend Group*** to add legends for "Task", "Summary", "Milestone", "Task Complete", "Summary Complete", and "Milestone Complete".	
	

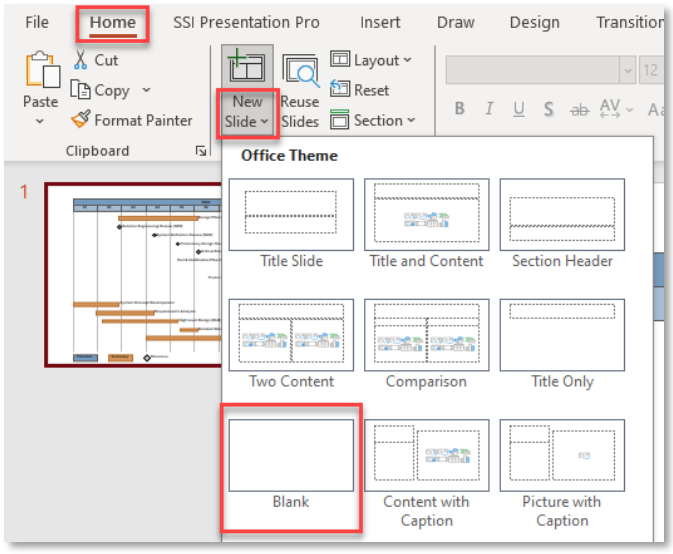
3. Go to Microsoft Project and open the SSI Example Project file. Set the outline to Level 1 by using the ***Outline*** menu on the ***View Ribbon***.	
4. Select the following tasks in the project shown on the image to the right →	
5. Navigate back to blank slide PowerPoint. Then click the top half of the ***Import Shapes*** button in the ***SSI Presentation Pro Ribbon***.	

	Task Name	% Complete
3	**Design Milestones**	**0%**
4	Solution Engineering Review (SER)	100%
5	System Definition Review (SDR)	0%
6	Preliminary Design Review (PDR)	0%
7	Critical Design Review (CDR)	0%
8	**Test & Verification Milestones**	**0%**
9	Test Readiness Review (TRR)	0%
10	Production Readiness Review (PRR)	0%
11	Operational Readiness Review (ORR)	0%
12	Receive Authority to Operate (ATO)	0%
13	**System Concept Development**	**100%**
14	**System Concept Development Tasks**	**100%**
15	Document the Concept of Operatio	100%
16	**Identify and Analyze Potential Solution Alternatives**	**100%**
19	Develop Life Cycle Cost Estimate (L	100%
20	Define Operations Requirements	100%
21	Develop Acquisition Plan (AP)	100%
22	Develop the Integrated Logistics Su	100%
23	Establish Acquisition Program Base	100%
24	**Solution Engineering Review (SER)**	**100%**
25	Conduct Solution Engineering Revi	100%
26	**Requirements Analysis**	**30%**
27	**Assess System Hardware Requirements**	**100%**
31	**Perform Software Requirements Analysis**	**54%**
32	Review CONOPS & Requirements D	100%
33	Review System Environment and I/	100%
34	Conduct User Surveys	80%
35	Develop System Software Requirer	0%

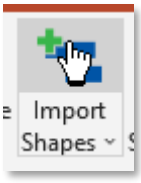
6. Observe the chart created and notice the distinction between activities that are 100% complete in Microsoft Project and those that are not:



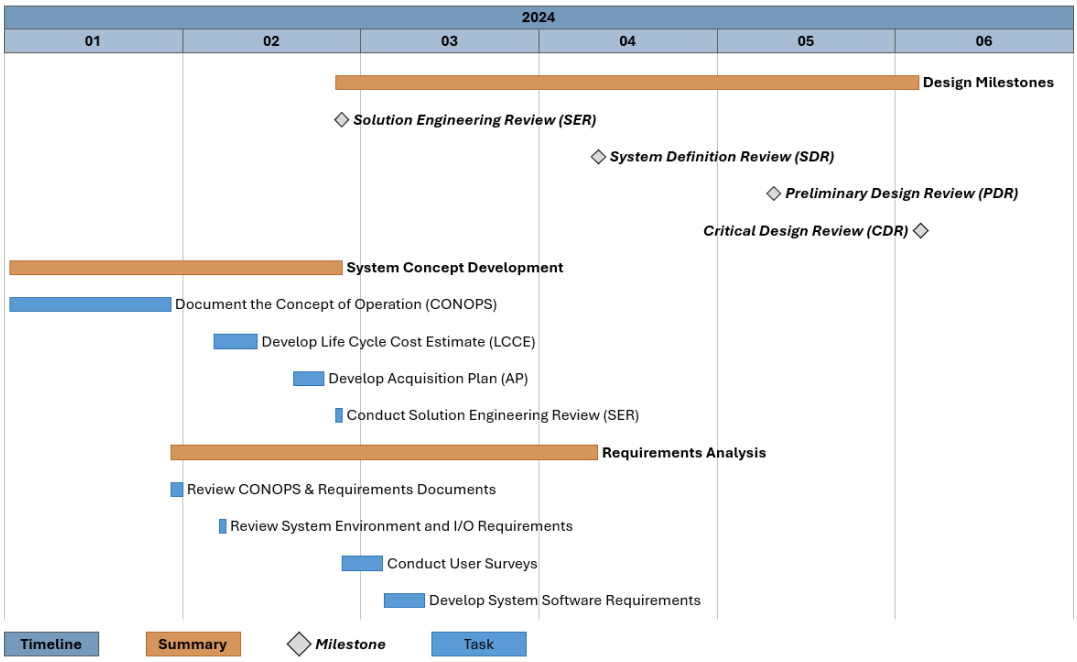
7. Add another blank slide in the same Presentation.



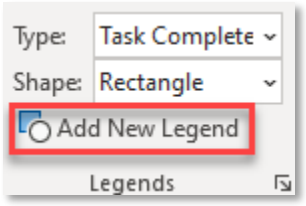
8. On the new blank slide, import the same activities from Microsoft Project by clicking the top half of the ***Import Shapes*** button in the ***SSI Presentation Pro Ribbon***.

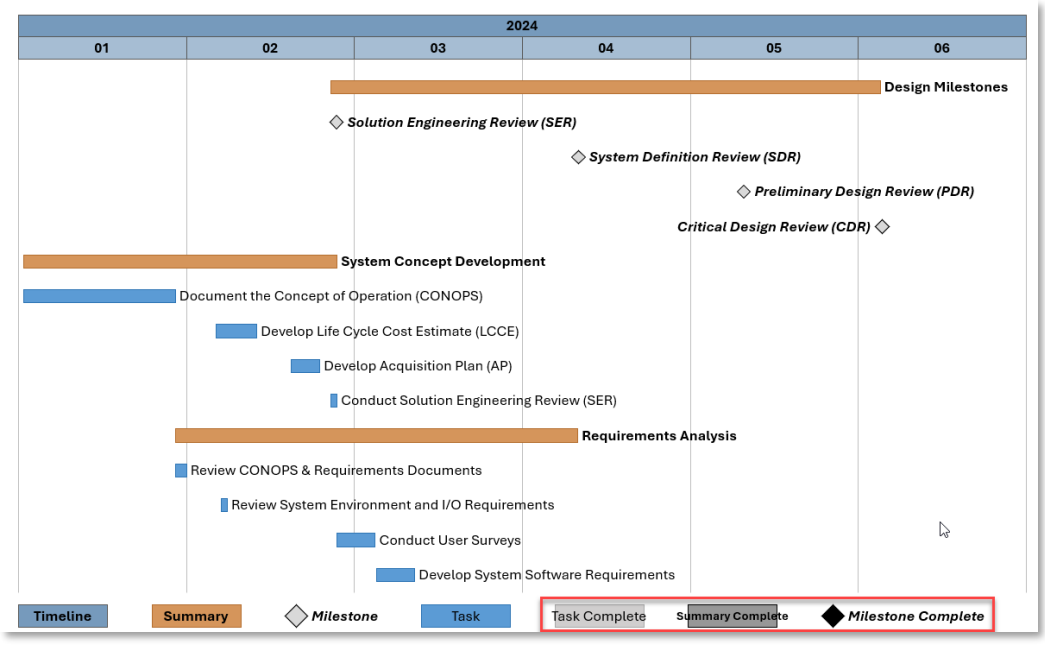


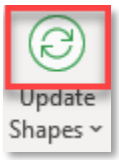
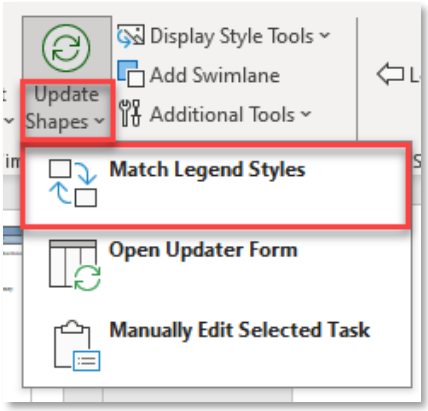
9. Observe the chart created and notice that *no* distinction is being made between activities that are 100% complete in Microsoft Project and those that are not:

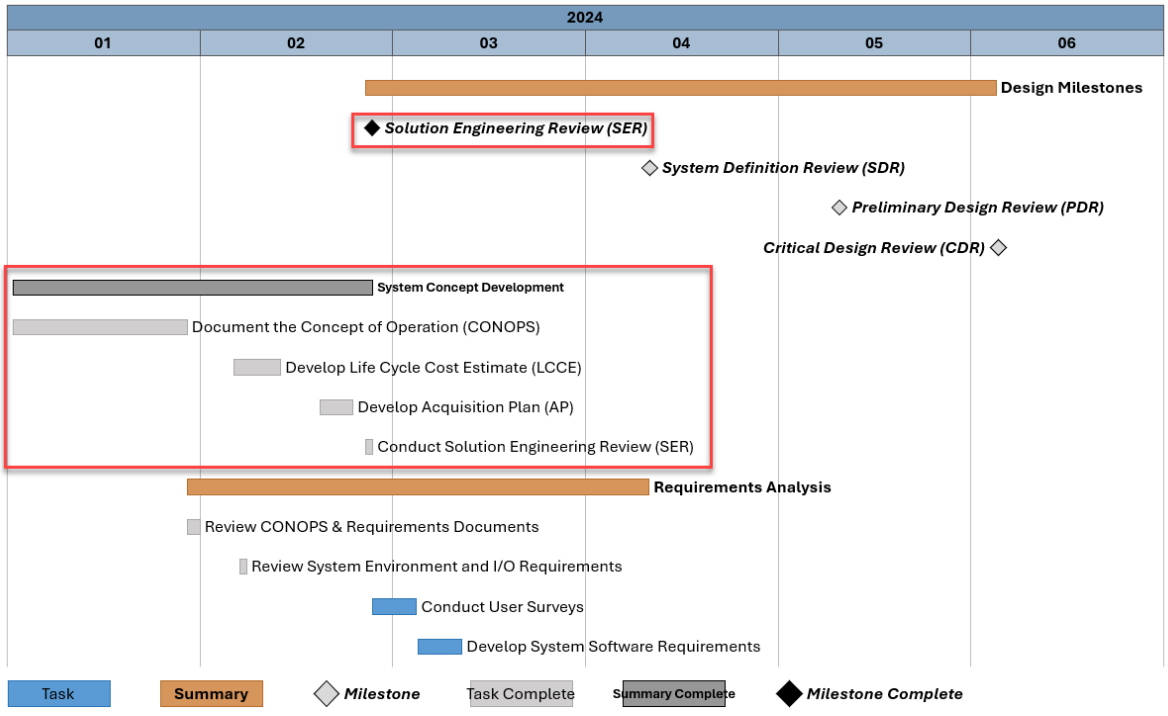


10. Use the ***Legend Group*** to add legends for "Task Complete", "Summary Complete", and "Milestone Complete".





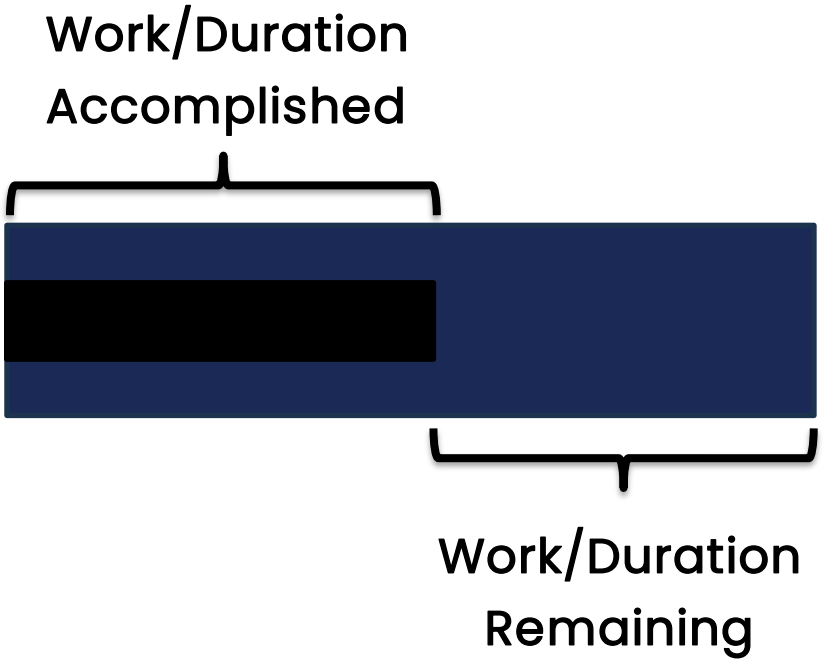
11. Click the top half of the ***Update Shapes*** button in the ***SSI Presentation Pro Ribbon***.	
12. Notice that it doesn't *appear* the chart has changed at all. It may not look like it, but because the "Complete" legends are on the slide, Presentation Pro has recognized the desire to distinguish complete activities from incomplete and has coded content on the chart appropriately.	
13. Click the lower half of the ***Update Shapes*** button, then click the ***Match Legend Styles*** button.	
14. Observe Presentation Pro has updated the chart to show the distinction between activities that are 100% complete in Microsoft Project and those that are not:	



End of Practice Exercise

Adding Progress Bars to Activities

In Presentation Pro, a ***Progress Bar*** is a shape placed over an activity that visually represents the percentage of work or duration completed. The width of the progress bar relative to the activity's width reflects the percentage complete, allowing viewers to easily see how much of the task has been accomplished.



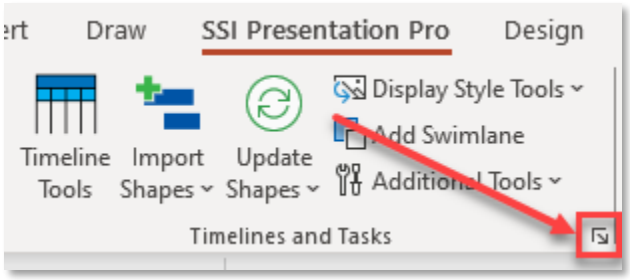
As shown in the image above, the black bar within the blue activity bar represents the portion of work or duration that has already been completed. The length of the black bar corresponds to the percentage of work accomplished, while the remaining portion of the blue bar indicates the work or duration still left to be completed. This visual distinction makes it easy to assess the progress of the task at a glance.

Progress bar 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 progress bars while initially building the chart or to add them later if needed.

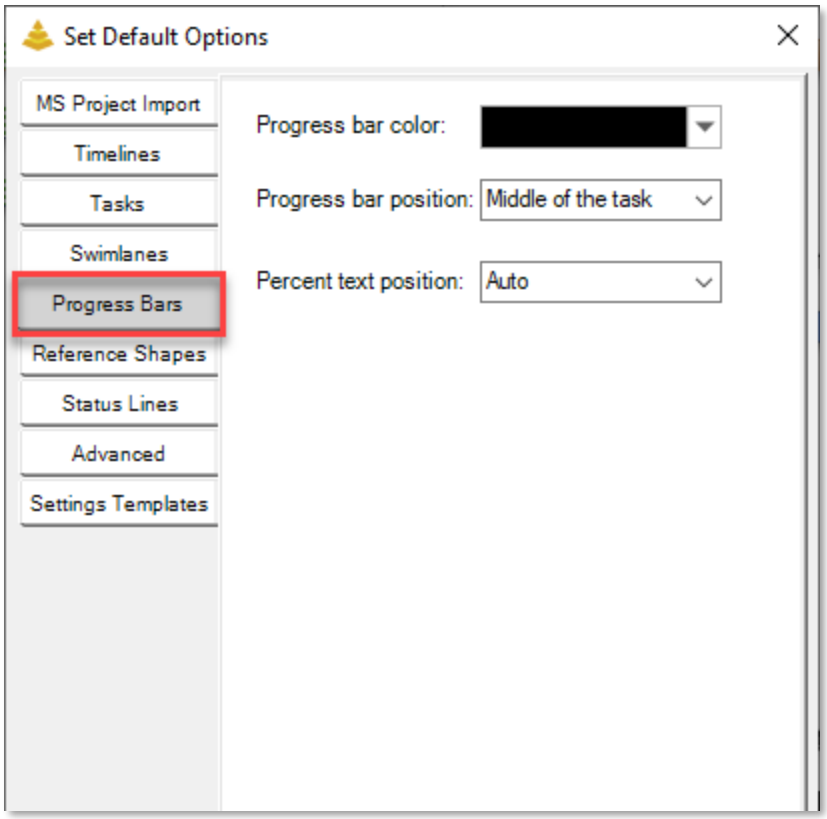
Setting the default settings of Progress bars

Unlike other Presentation Pro shapes, progress bars do *not* have a corresponding legend. When you add progress bars to a chart, they always adhere to the default settings saved in the ***Presentation Pro Default Options form***. To ensure they match your preferences, it's important 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 progress bars, navigate to the ***Progress Bars*** tab on the ***Presentation Pro Default Options form***:



There are three progress bar settings you can adjust.

1. **Progress Bar Color**

This dropdown allows you to select the default color for progress bars. Clicking the dropdown opens a color picker, enabling you to choose the desired color that will be used for all progress bars added to your chart.

2. **Progress Bar Position**

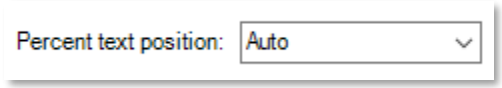
This dropdown lets you determine where the progress bar will be placed relative to the task shape. There are three options to choose from:

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

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

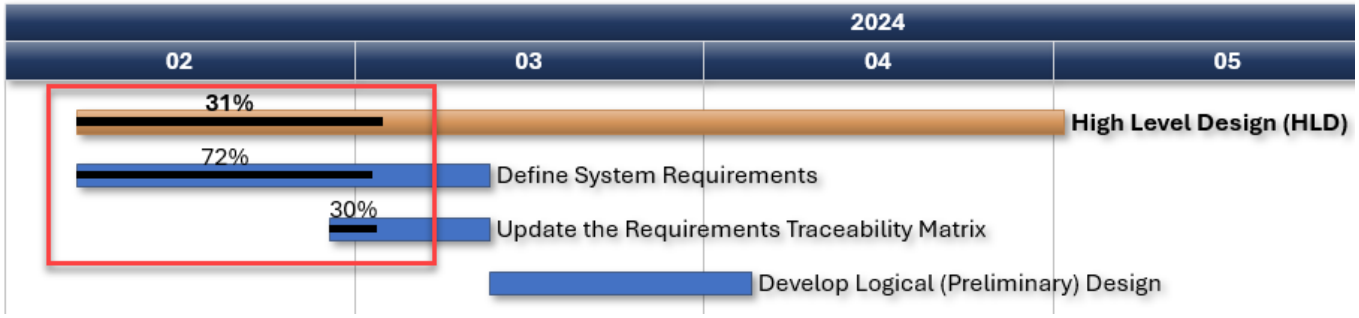
- ***Same height as the task***: a bar the same height as the activity:

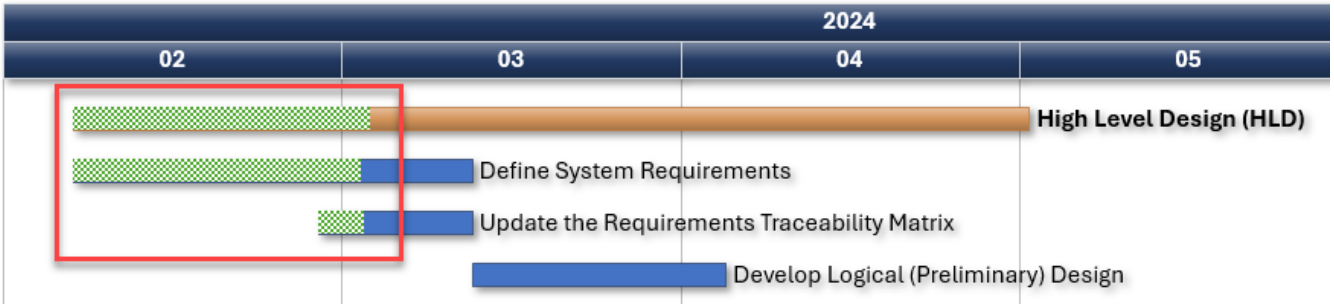
3. **Percent Text Position**



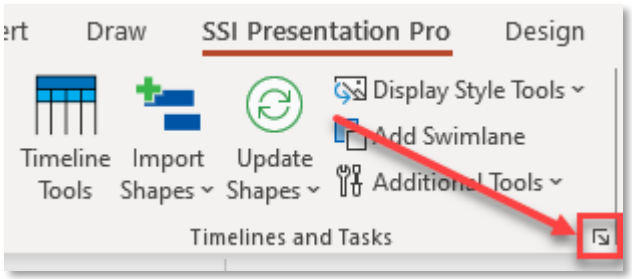
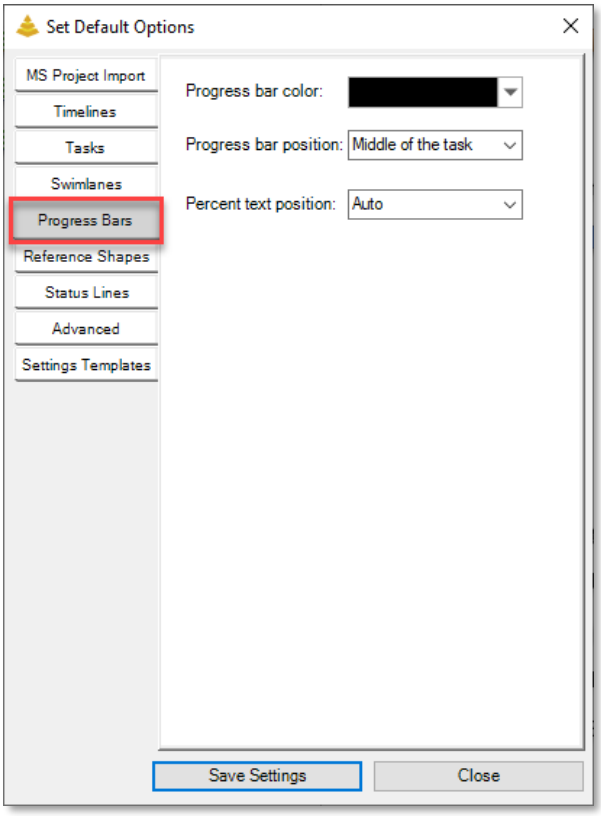
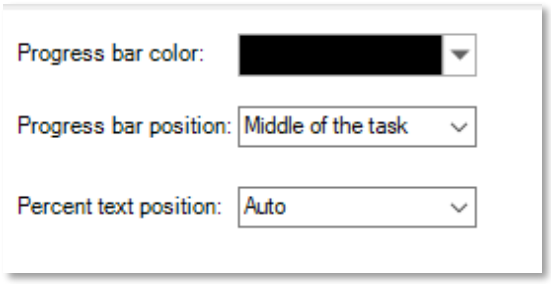
This dropdown controls the positioning of the percentage complete text, which can be displayed alongside the progress bar. The "Auto" setting automatically places the text in a position that optimizes visibility, but you can also select other positions if needed. You can also choose to omit the percentage complete text altogether by selecting the “None” option.

After progress bars have been added to activities in a chart, they can be styled just as any other PowerPoint shape. The images below depict an example chart with all three different styles of progress bar on them:



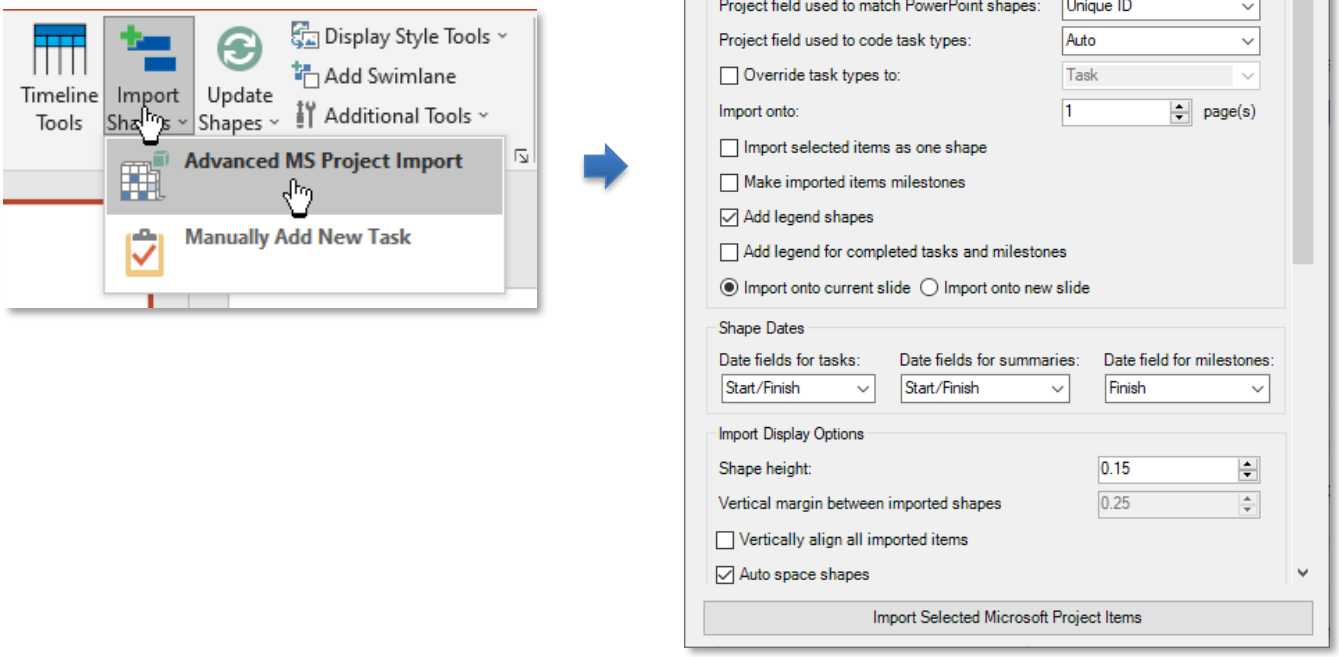


Class Exercise – Adjusting Progress Bar Default Settings

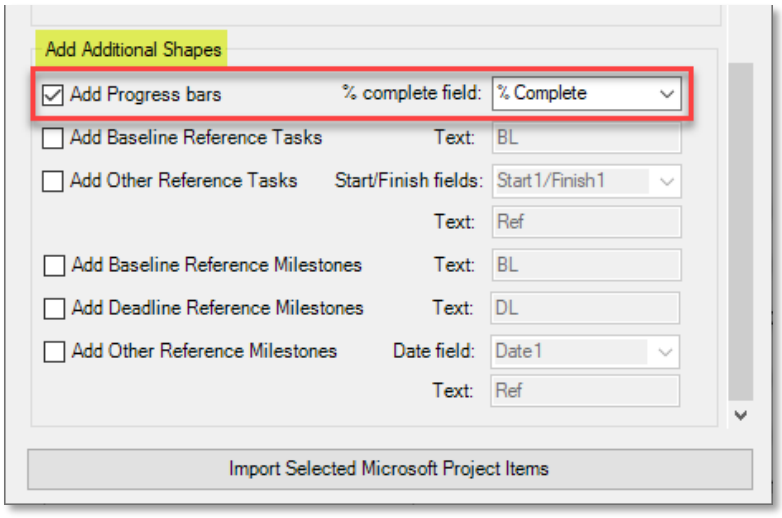
Start of Practice Exercise	
1. In PowerPoint, open the ***Presentation Pro Default Options form*** by clicking the button in the bottom right corner of the ***Timelines and Tasks group*** in the ***SSI Presentation Pro Ribbon***.	
2. Click the ***Progress Bars*** tab on the ***Presentation Pro Default Options form*** to navigate to the progress bar default options.	
3. Adjust the progress bar default options to your liking. You can change the color, the position, and the text position.	
4. Once you have finished adjusting the progress bar options, click the ***Save Settings*** button at the bottom of the ***Presentation Pro Default Options form.***	
End of Practice Exercise	

Adding Progress Bars on Import

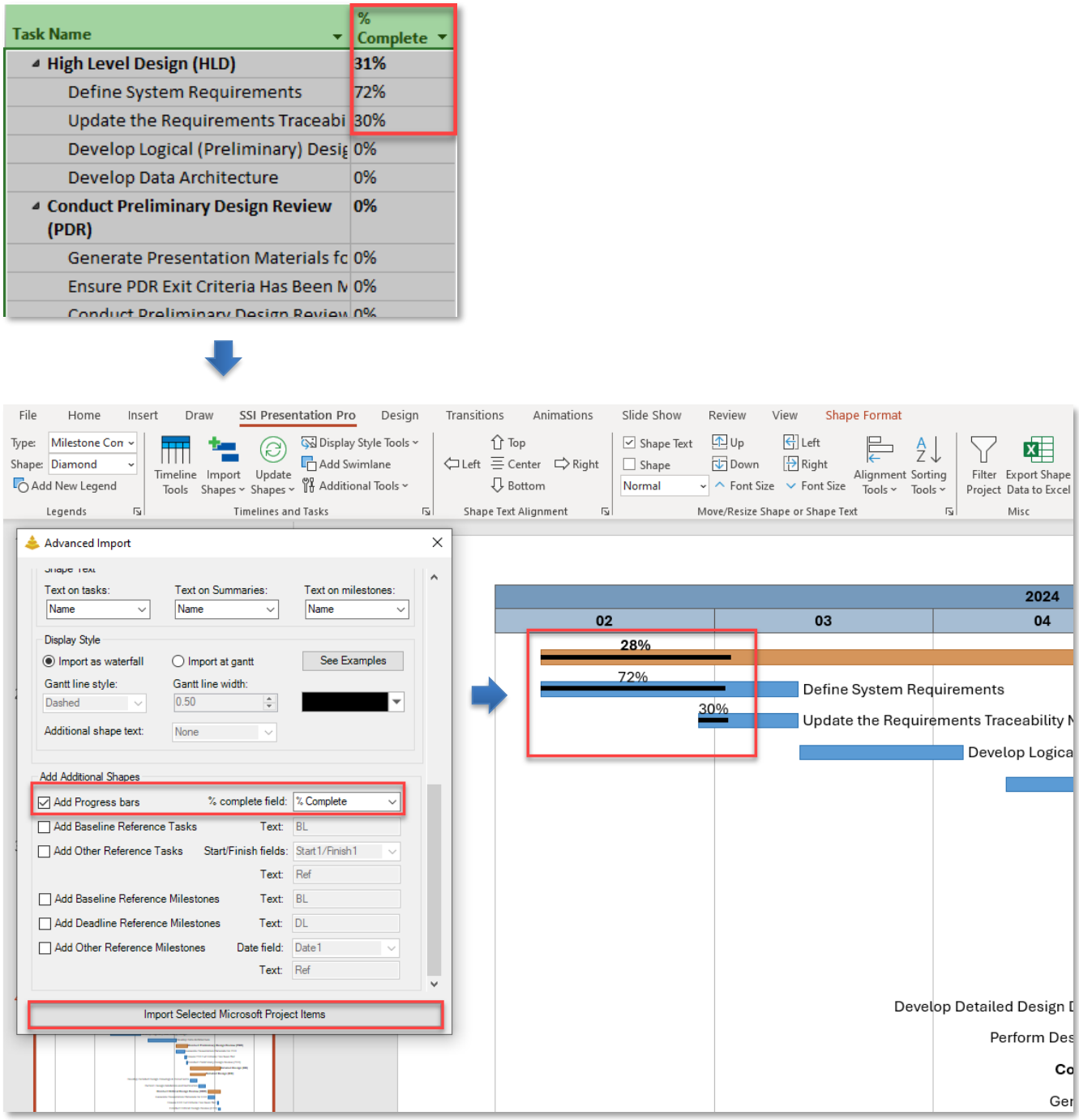
Progress bars can be added to activities when they are imported from Microsoft Project. To do this, open the ***Advanced Import form*** by clicking the lower half of the ***Import Shapes*** button in the ***Timelines and Tasks group*** of the ***SSI Presentation Pro ribbon***, then choose the ***Advanced MS Project Import*** option:



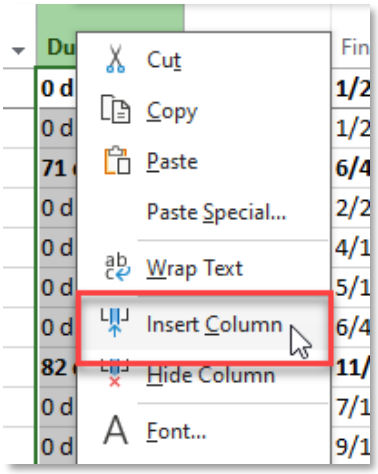
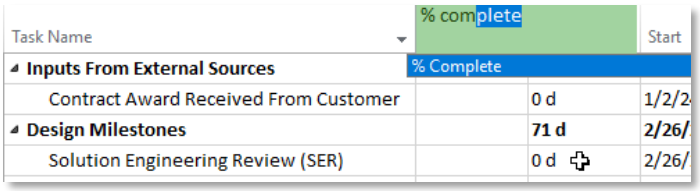
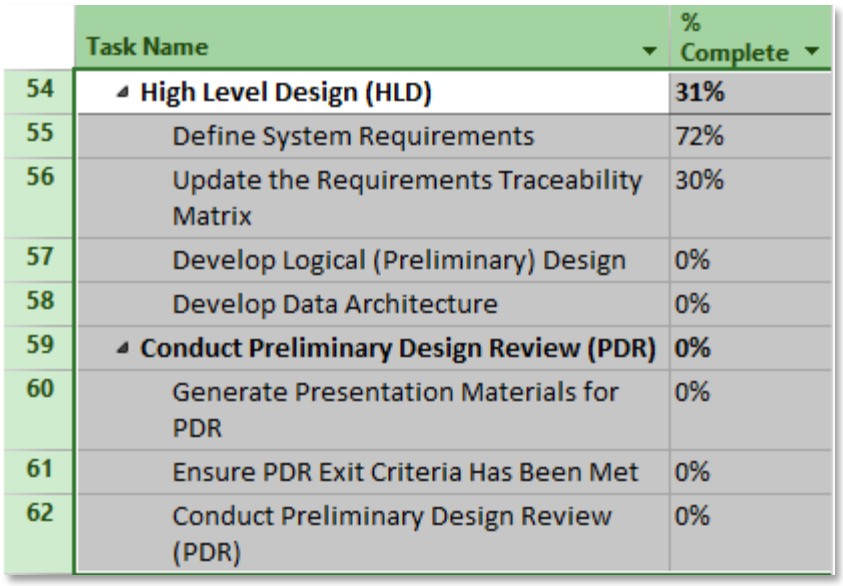
At the bottom of the form, you will find the option to ***Add Progress bars*** in the ***Add Additional Shapes group***.



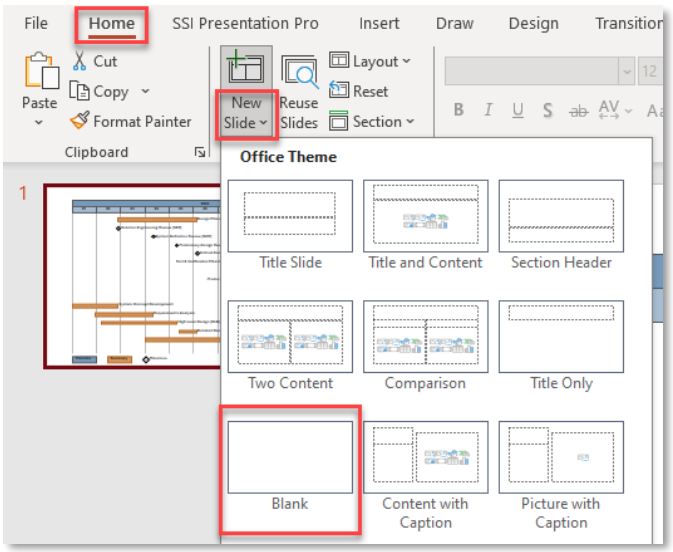
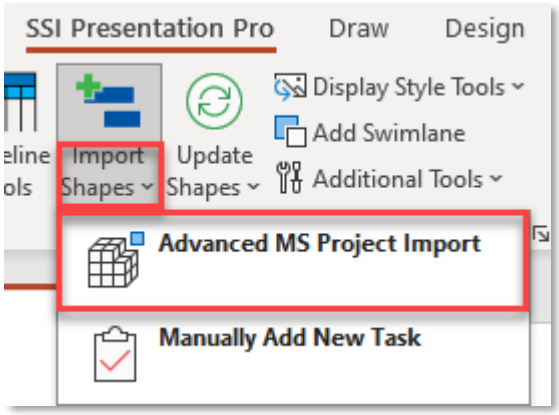
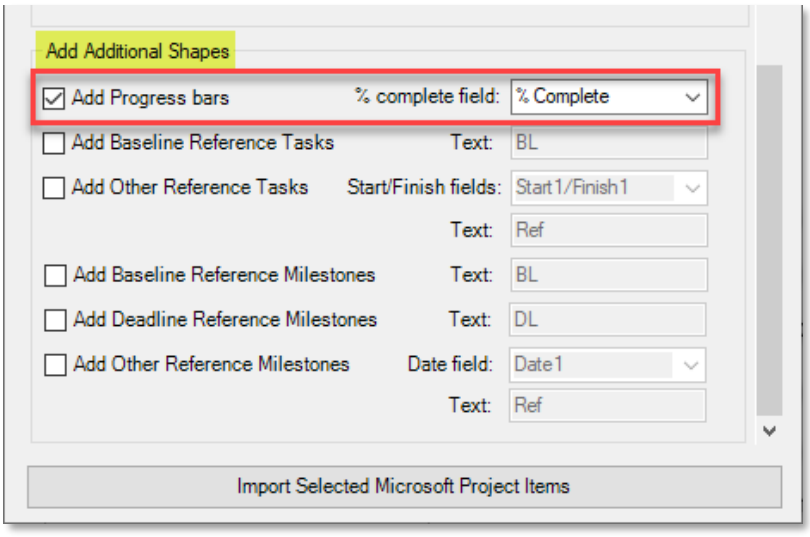
When this option is checked, Presentation Pro will automatically include progress bar shapes for the activities imported from Microsoft Project, provided that the value in the selected **% complete field** is greater than 0%. The **% complete field** dropdown allows you to choose between "% Complete," "Physical % Complete," or any of the twenty custom Number fields available in Microsoft Project, ensuring that the progress bars accurately reflect the completion status of each task according to whichever field you use in Project to record progress. Observe the images below depicting importing selected tasks from Microsoft Project with progress bars using the ***Advanced Import form***:



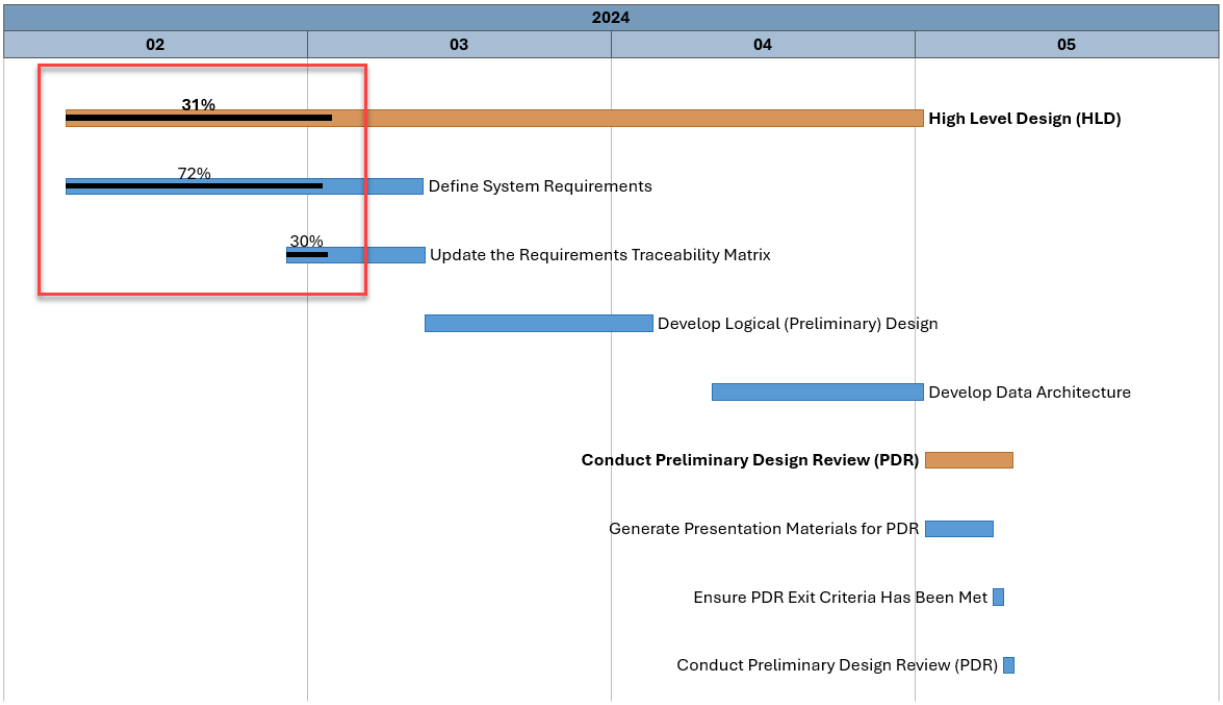
Class Exercise – Adding Progress Bars on Import

Start of Practice Exercise	
5. Go to Microsoft Project and open the SSI Example Project file.	
6. Insert the ***% Complete*** column in the Gantt Chart of the Example Project.	 
7. Select rows 54 -62 in the Gantt chart like the image on the right →	

	Task Name	% Complete
54	High Level Design (HLD)	31%
55	Define System Requirements	72%
56	Update the Requirements Traceability Matrix	30%
57	Develop Logical (Preliminary) Design	0%
58	Develop Data Architecture	0%
59	Conduct Preliminary Design Review (PDR)	0%
60	Generate Presentation Materials for PDR	0%
61	Ensure PDR Exit Criteria Has Been Met	0%
62	Conduct Preliminary Design Review (PDR)	0%

8. In PowerPoint, add a new blank slide.	
9. 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***.	
10. On the ***Advanced Import form***, scroll down to the bottom and check the ***Add Progress bars*** option. Leave the ***% complete field*** set to "% Complete".	
11. Click the ***Import Selected Microsoft Project Items*** button at the bottom of the form.	

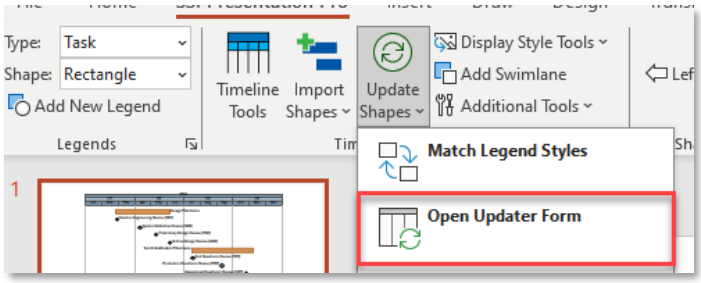
12. Observe the progress bars on the chart created (they should follow your saved progress bar default settings).

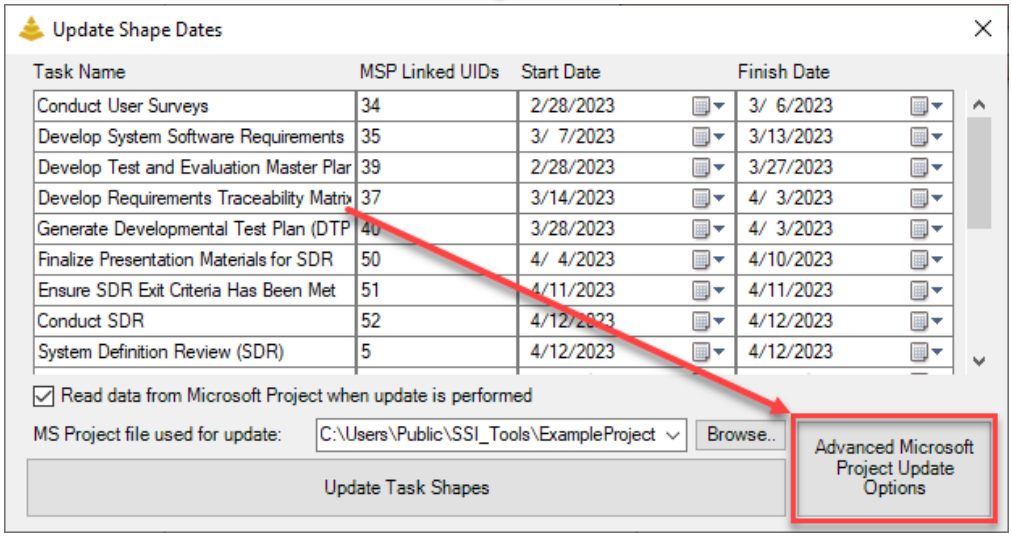


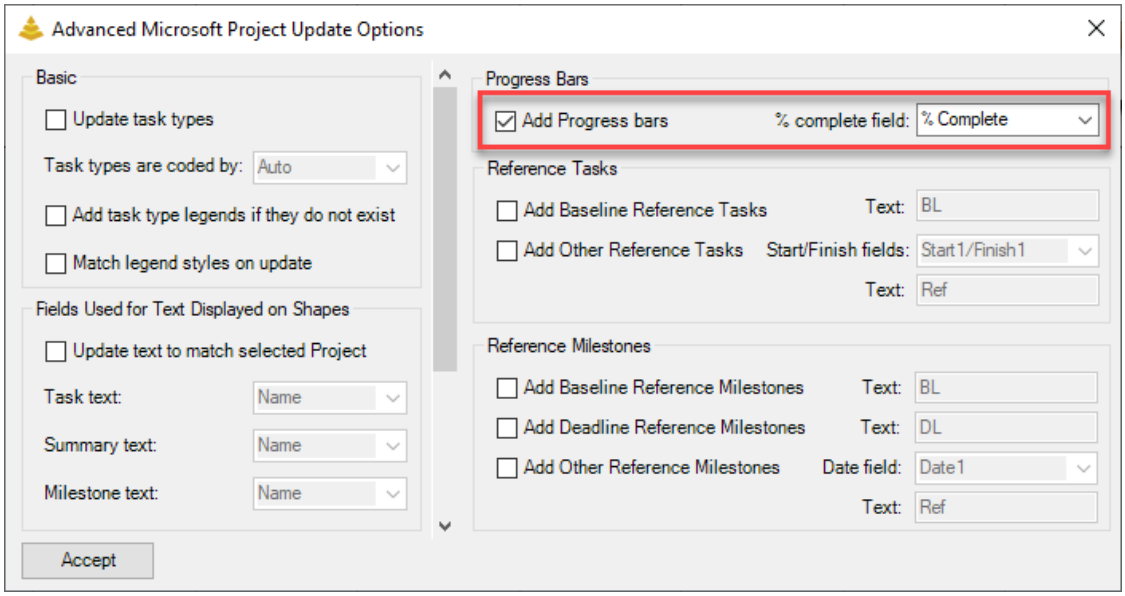
End of Practice Exercise

Adding Progress Bars on Update

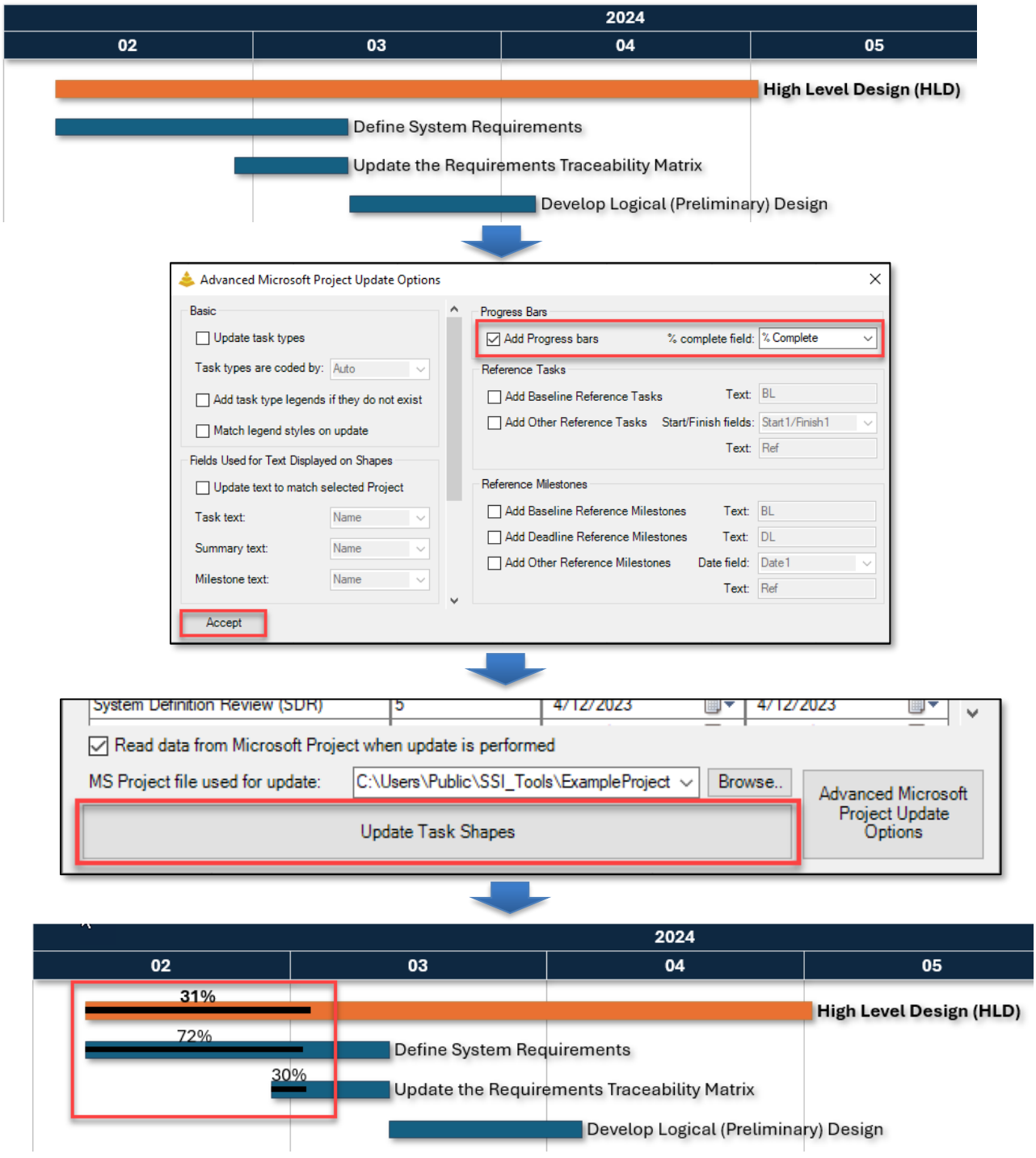
Progress bars can also be added to activities *after* a chart has already been created by Presentation Pro by using the ***Advanced Options*** on the ***Updater Form***.



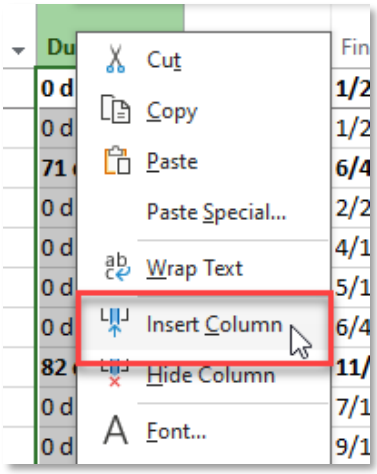
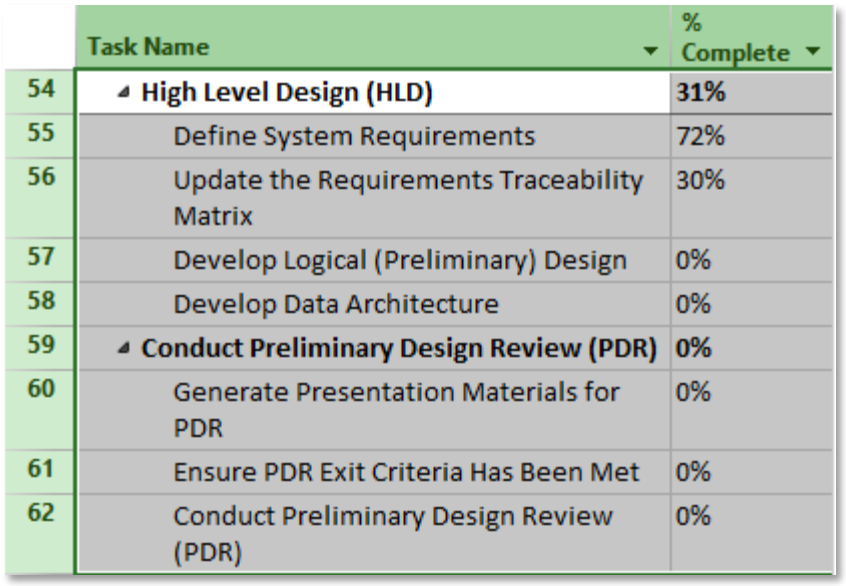




Checking the ***Add Progress bars*** option in the upper right section of the ***Advanced Update Options form*** tells Presentation Pro to add progress bars to activities on the current slide based on the value the activity has in the specified ***% complete field*** in Microsoft Project, provided that the value is greater than 0%, when the update process occurs. When you are ready to update the content on the slide, click the ***Update Task Shapes*** button on the ***Updater Form***. Make sure you have set the ***MS Project file used for update*** to the correct file before doing this.

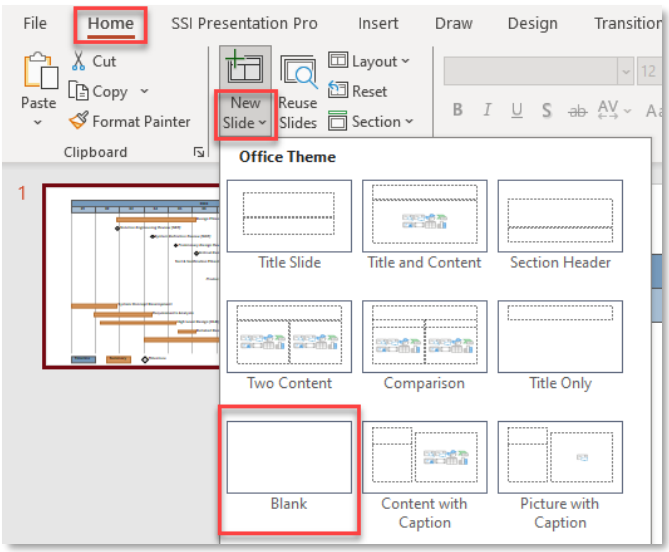


Class Exercise – Adding Progress Bars on Update

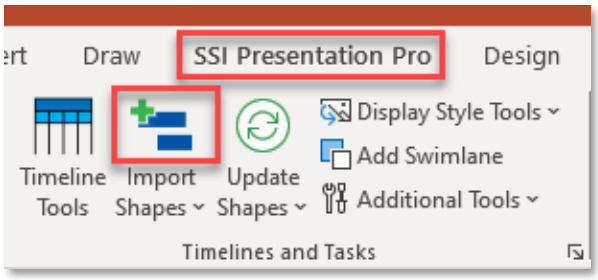
Start of Practice Exercise	
1. Go to Microsoft Project and open the SSI Example Project file.	
2. Insert the ***% Complete*** column in the Gantt Chart of the Example Project.	
3. Select rows 54 -62 in the Gantt chart like the image on the right →	

	Task Name	% Complete
54	High Level Design (HLD)	31%
55	Define System Requirements	72%
56	Update the Requirements Traceability Matrix	30%
57	Develop Logical (Preliminary) Design	0%
58	Develop Data Architecture	0%
59	Conduct Preliminary Design Review (PDR)	0%
60	Generate Presentation Materials for PDR	0%
61	Ensure PDR Exit Criteria Has Been Met	0%
62	Conduct Preliminary Design Review (PDR)	0%

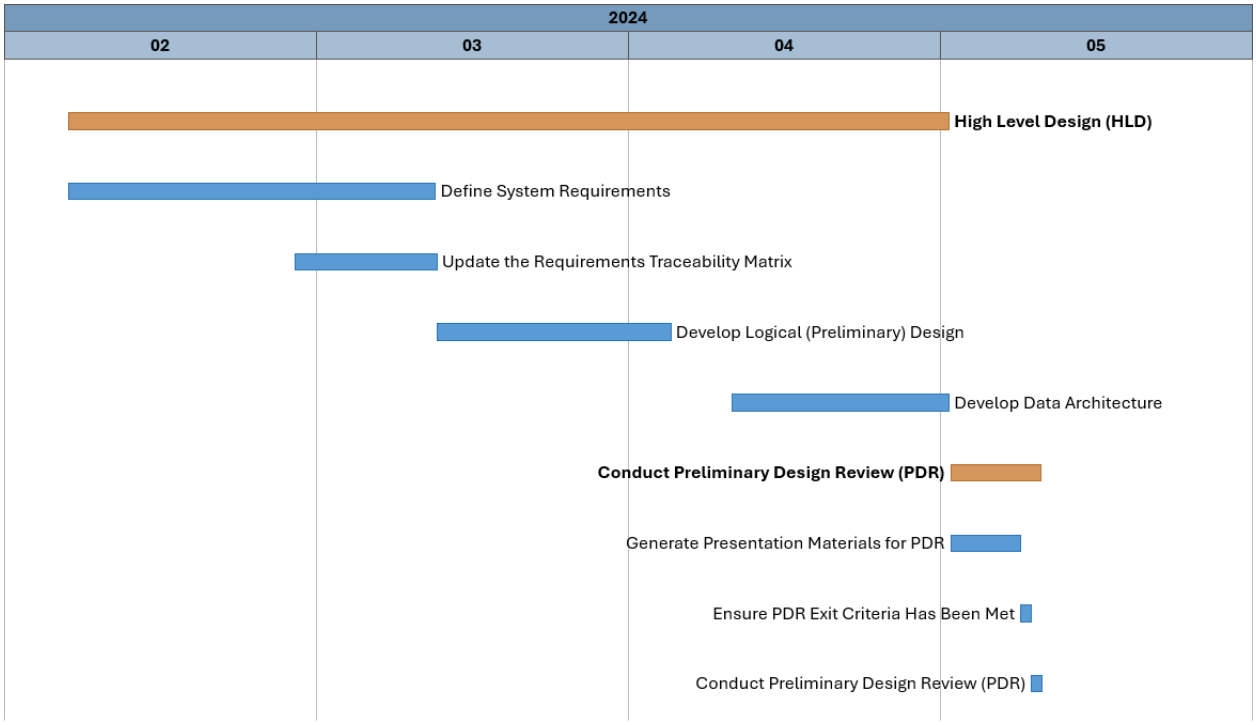
4. In PowerPoint, add a new blank slide.



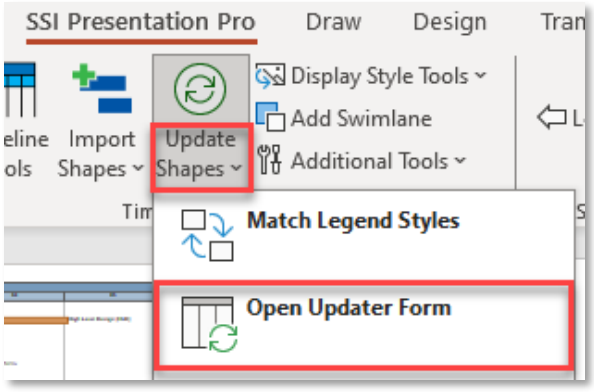
5. Click the top half of the ***Import Shapes*** button in the ***SSI Presentation Pro Ribbon***.



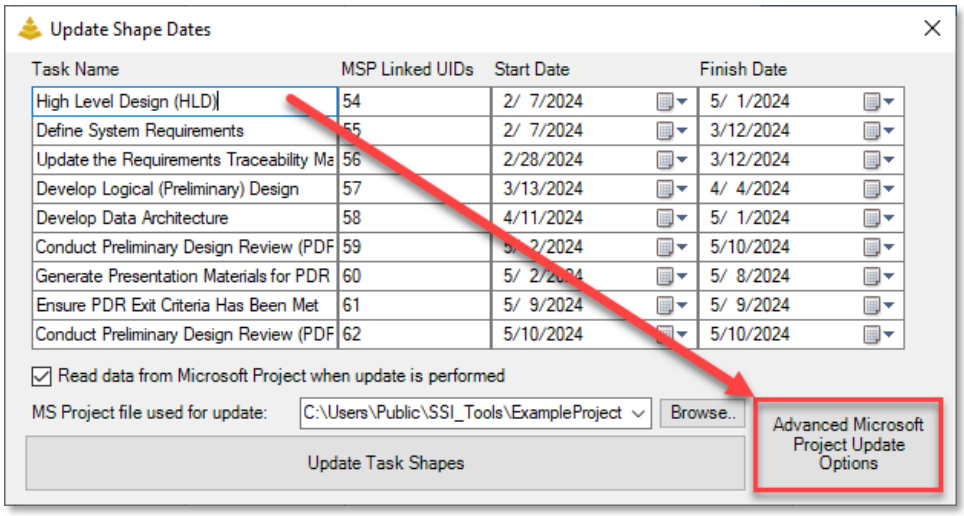
6. Obseve the chart created. Notice that there are no progress bars on any of the activities:



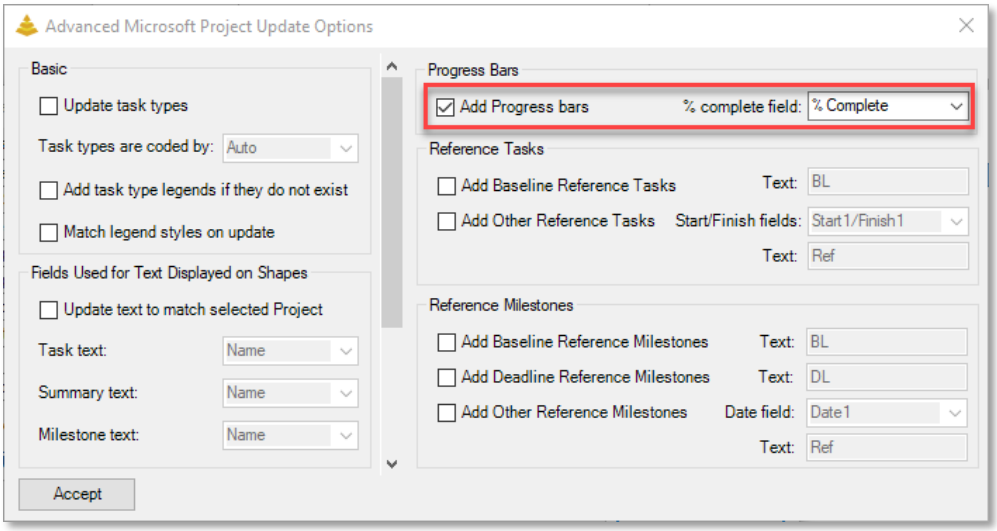
7. Stay on the same slide and open the ***Updater Form*** by clicking the lower half of the ***Update Shapes*** button and selecting the ***Open Updater Form*** option from the menu



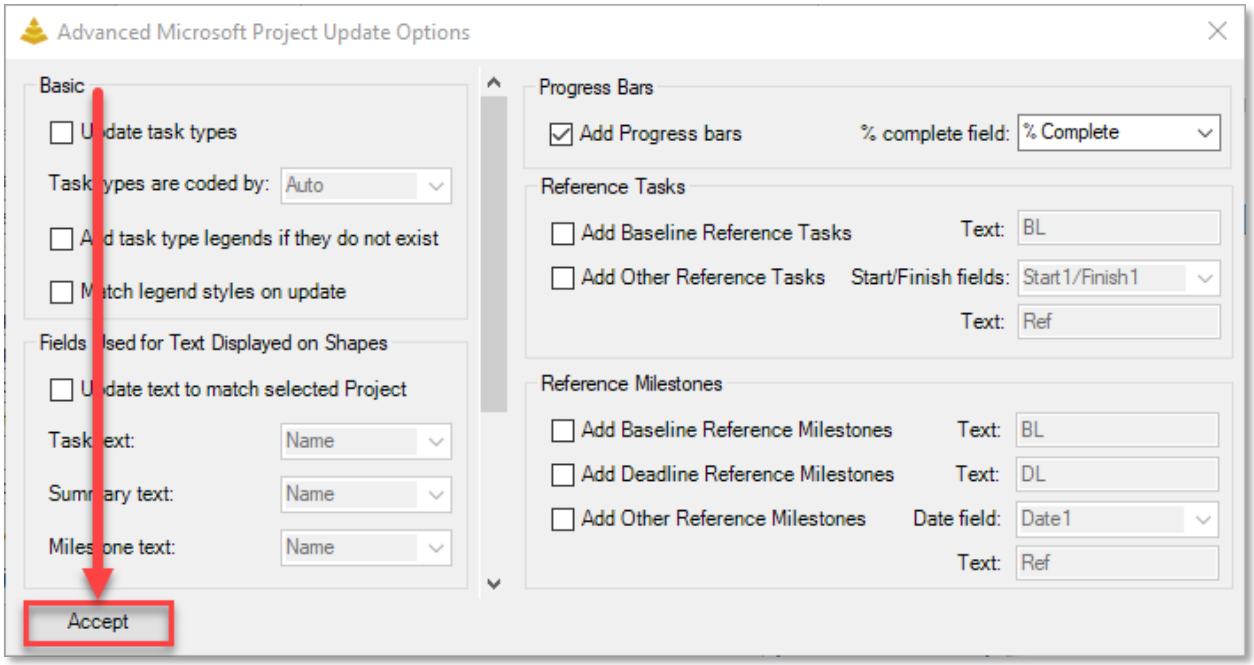
8. Open the ***Advanced Update Options*** by clicking the ***Advanced Microsoft Project Update Options*** at the bottom right corner of the ***Updater Form***.



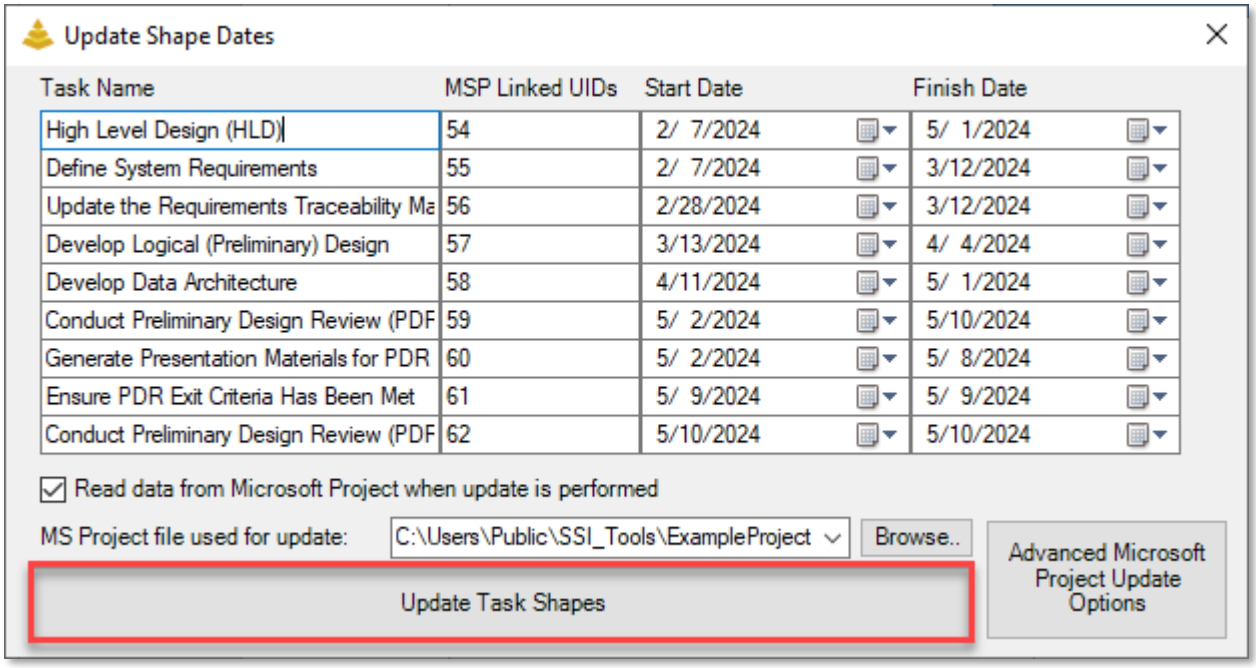
9. On the ***Advanced Update Options form***, check the ***Add Progress bars*** option. Leave the ***% complete field*** set to "% Complete".



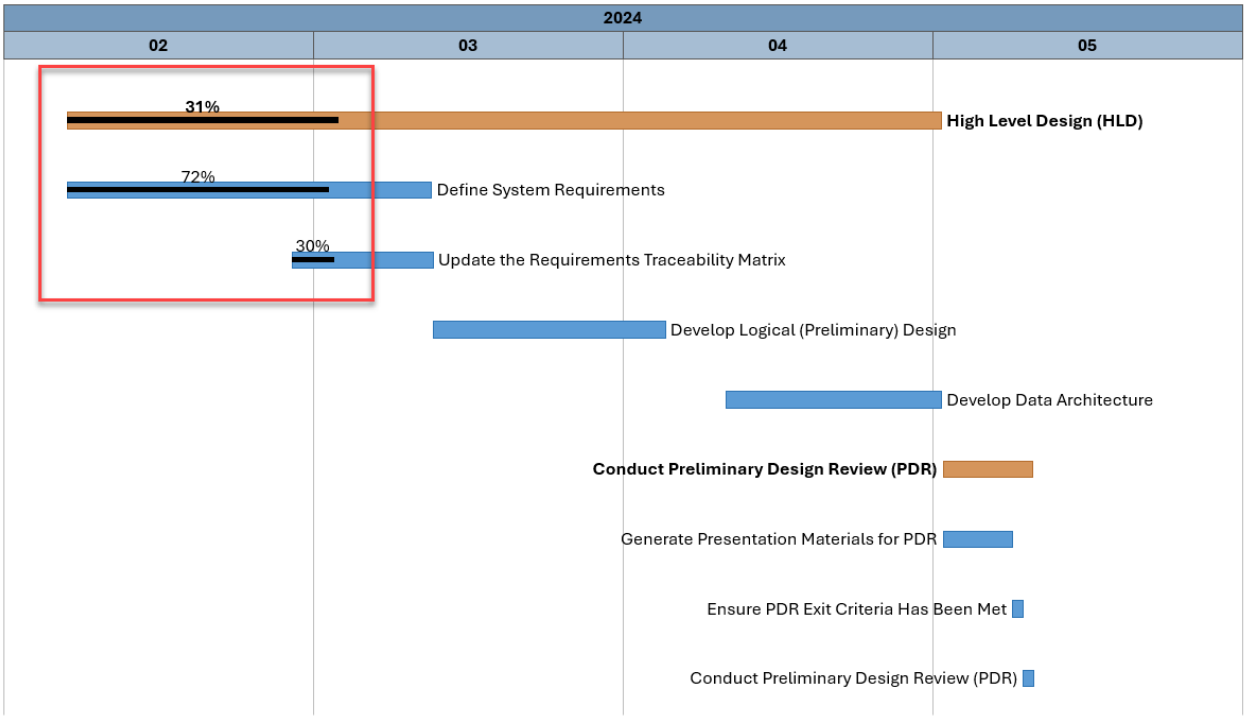
10. Click the ***Accept*** button in the bottom left corner of the ***Advanced Update Options form***



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



12. After the update process completes, observe that progress bars have been added to the chart:



End of Practice Exercise

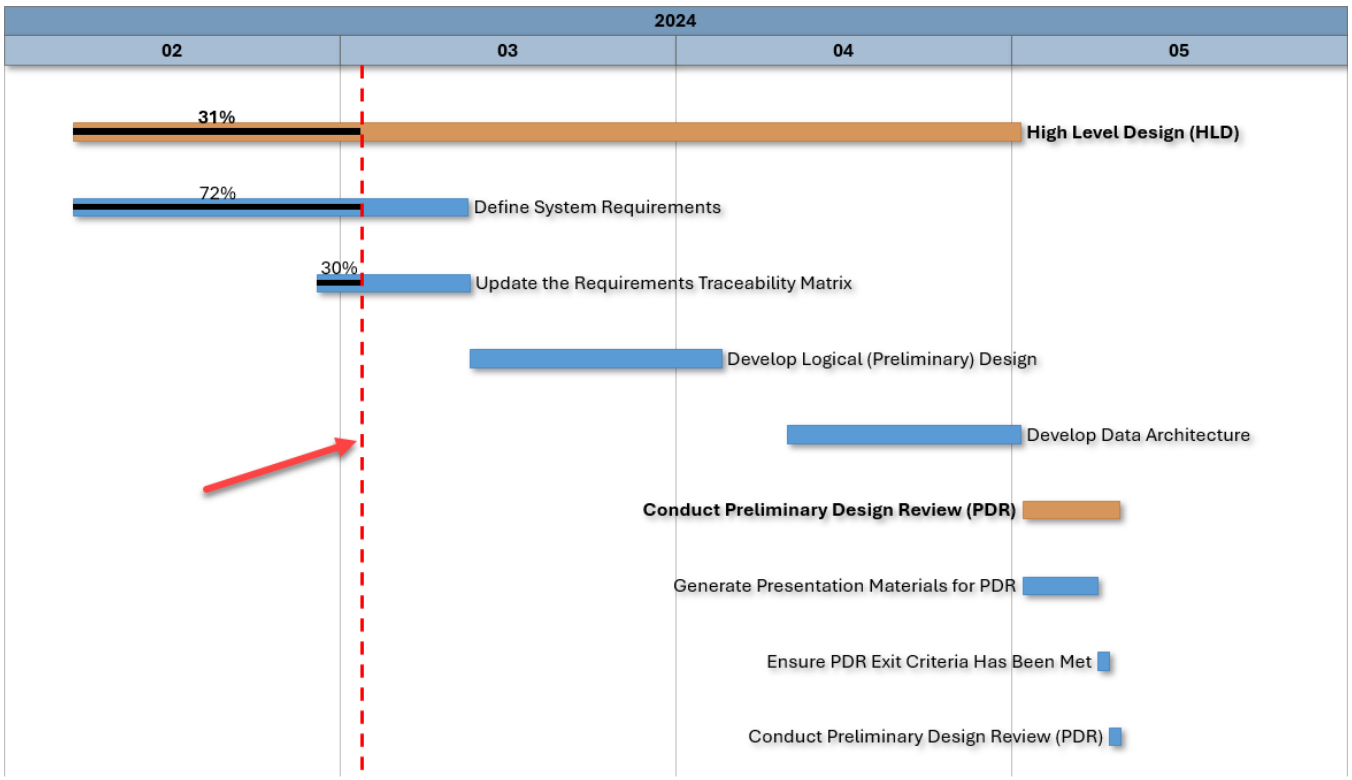
Using the Status Date Tools

Adding a status date line to a chart

When showing the progress of activities on a chart, both presenters and audiences often want to see a ***status date*** displayed.

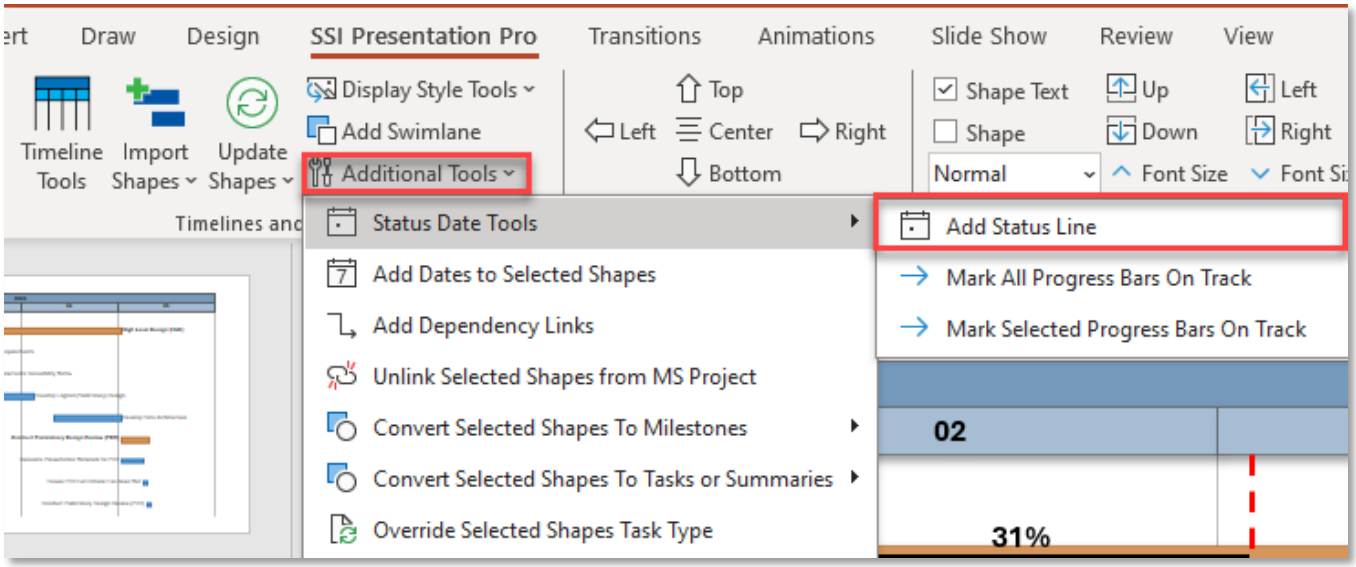
A project's ***status date*** is a specific point in time used to assess and report progress. It marks the date up to which the project's data—such as task completion percentages, resource allocation, and other key metrics—are considered current and accurate. The status date serves as a reference for comparing planned versus actual progress, enabling project managers to evaluate performance, identify delays, and make informed decisions about necessary adjustments to keep the project on track. In a Gantt chart, the status date is typically marked to help stakeholders understand the timing and relevance of the displayed information.

You can use Presentation Pro to create a status date line on a chart, as shown in the image below:

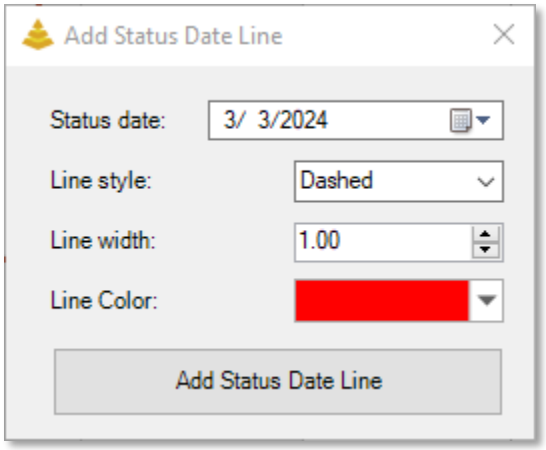


If you create a status date line using Presentation Pro, it will automatically move if your timeline is adjusted.

To add a status date line to a slide, you must first have a timeline created on the slide. Once the timeline is in place, you can easily add a status date line by using the ***Add Status Line*** tool. To access this tool in Presentation Pro, click on the ***Additional Tools*** menu, hover over the ***Status Date Tools*** option to reveal the status date tools menu, and then click ***Add Status Line*** as shown in the image.

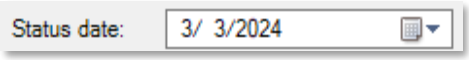


Clicking this button will open the ***Add Status Date Line*** tool:



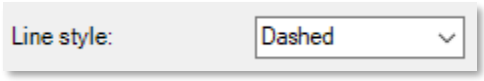
Below are the detailed explanations of each control available in this form:

- **Status Date**:

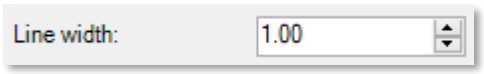
  This field allows you to select the specific date that the status line will represent. You can manually enter the date or use the calendar picker by clicking the calendar icon to choose the date visually.

- **Line Style**



This dropdown lets you choose the style of the status date line. Options include "Solid," "Dashed," and “Dotted”, allowing you to select the one that best fits your chart's design.

- **Line Width**

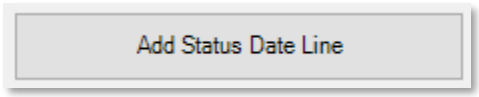


This control allows you to set the thickness of the status date line. Enter a value or use the up/down arrows to adjust the line width, measured in points, to achieve the desired visual weight.

- **Line Color**

This dropdown allows you to choose the color of the status date line. Clicking the dropdown opens a color picker, enabling you to select the color that will make the status date line stand out or blend with your chart's color scheme.

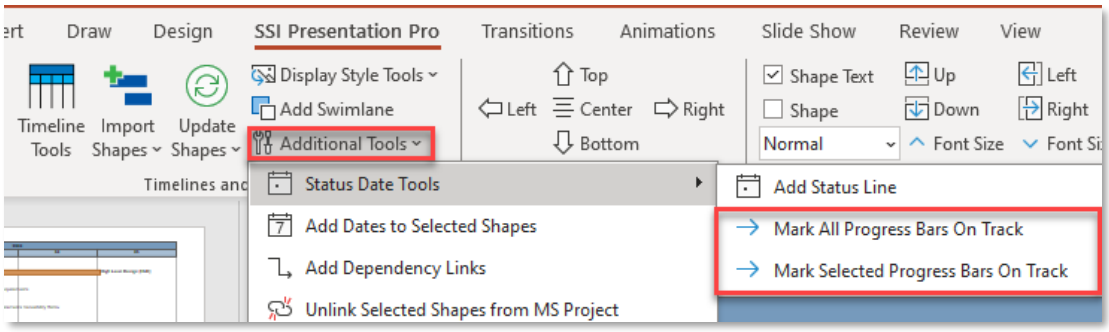
- **Add Status Date Line**



Once all the desired settings are configured, click this button to insert the status date line into your chart, based on the selected date and formatting options.

Marking Progress bars "On Track"

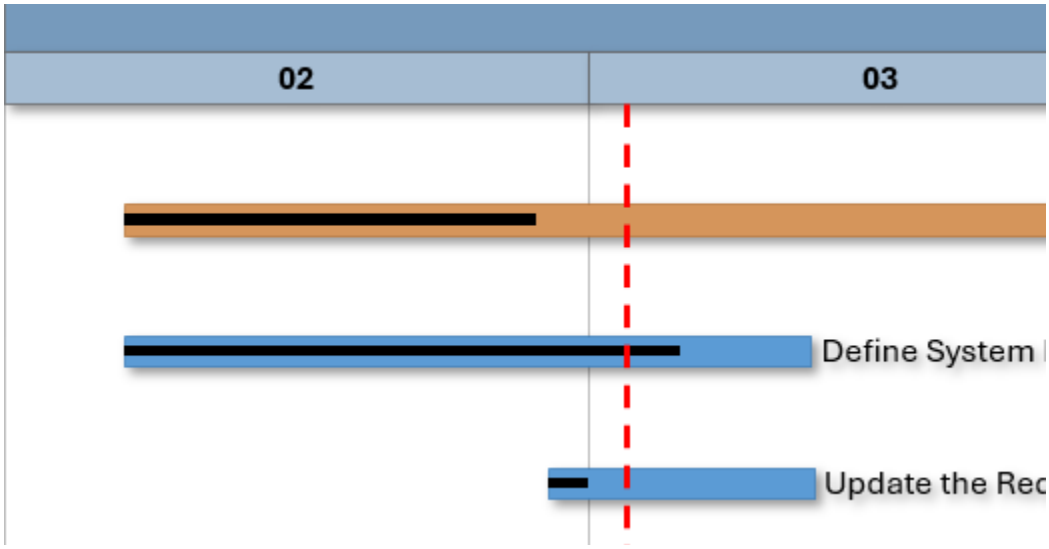
If you have added a status date line to a chart, you can use the ***Mark All Progress Bars on Track*** and ***Mark Selected Progress Bars on Track*** button in the ***Status Date Tools*** menu:



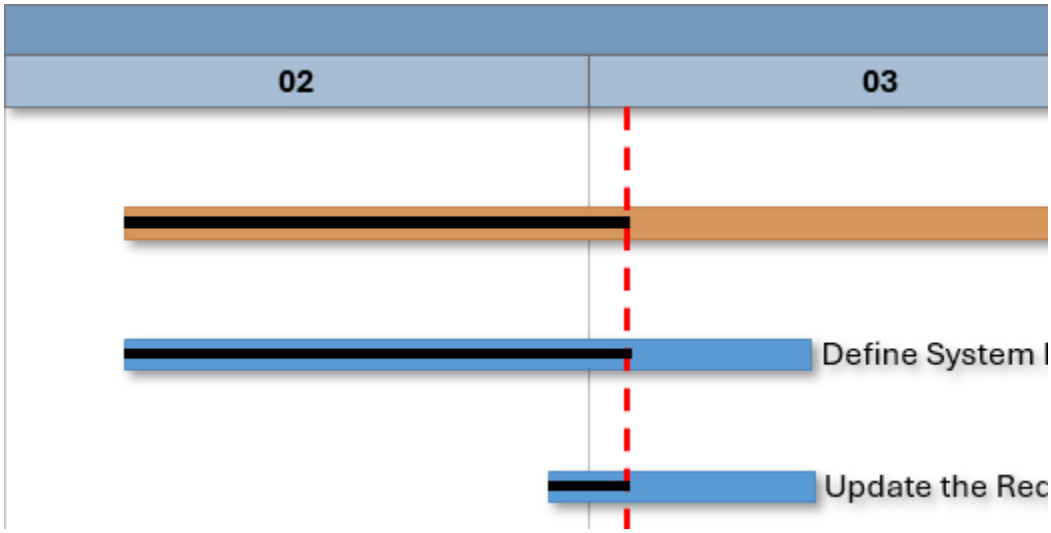
Marking a progress bar "On Track" is the act of bringing it up to the status line. Observe the example below:

You can see that the right edge of black progress bar goes right up against the red dashed status date line. This indicates the task's progress is "On Track" per the status date.

The tools for marking progress bars as "On Track" can be very useful, as various factors may cause progress bars to not align with the status date on your chart, potentially creating an awkward appearance for your audience. Compare the following two images:

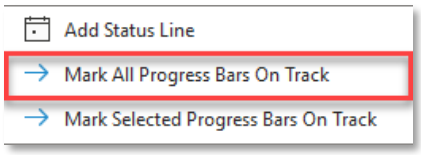


Vs.

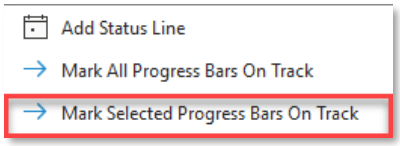


As you can see, the second image where the progress bars are all marked on track can be more visually appealing and not cause confusion for the audience.

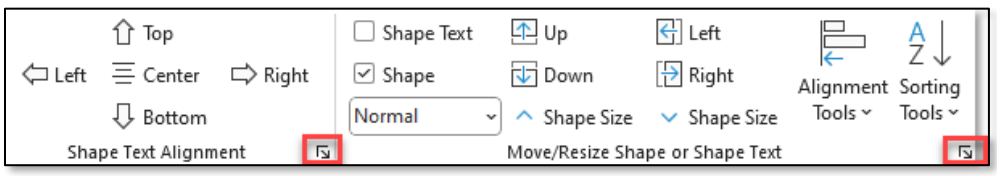
Click the ***Mark All Progress Bars on Track*** button to mark all progress bars on the current slide up to the status date line.



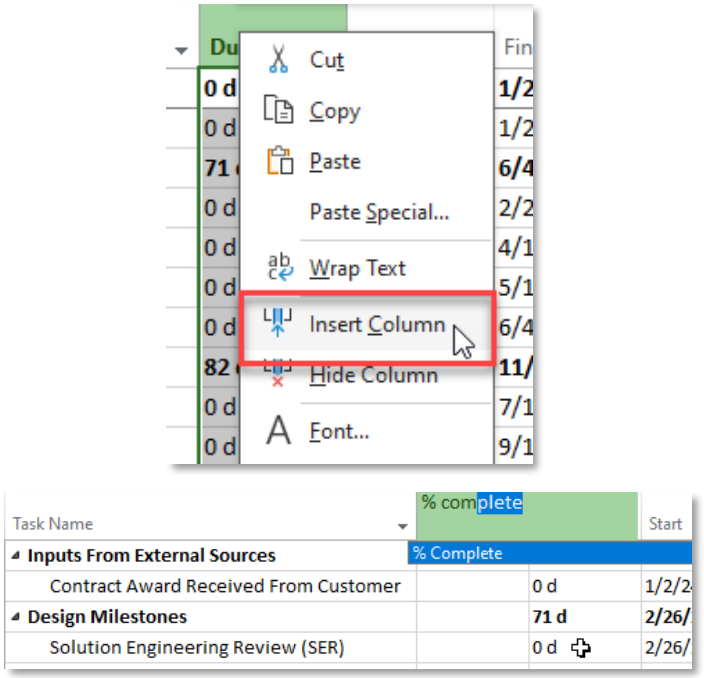
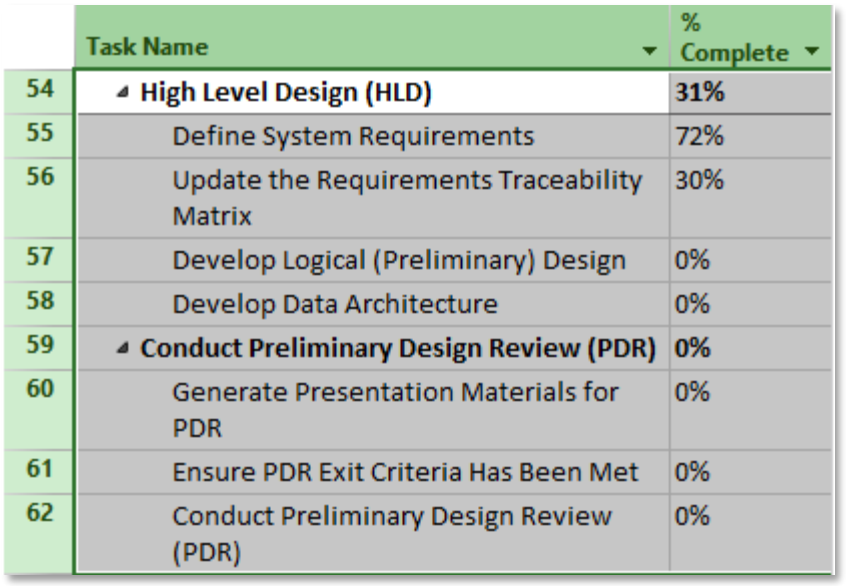
Click the ***Mark Selected Progress Bars on Track*** button to mark the selected progress bars on the current slide up to the status date line.



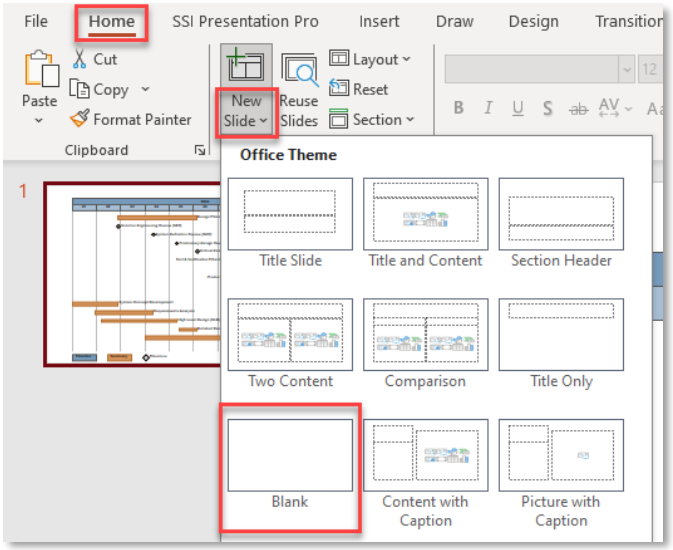
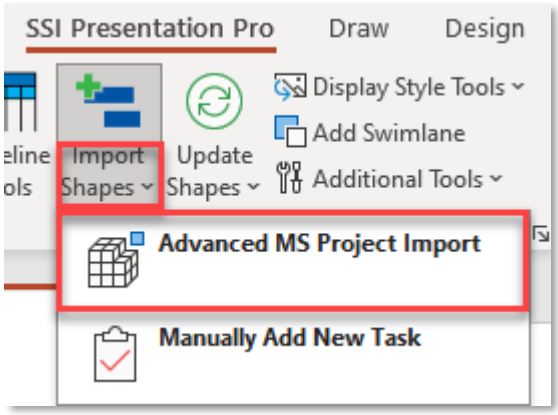
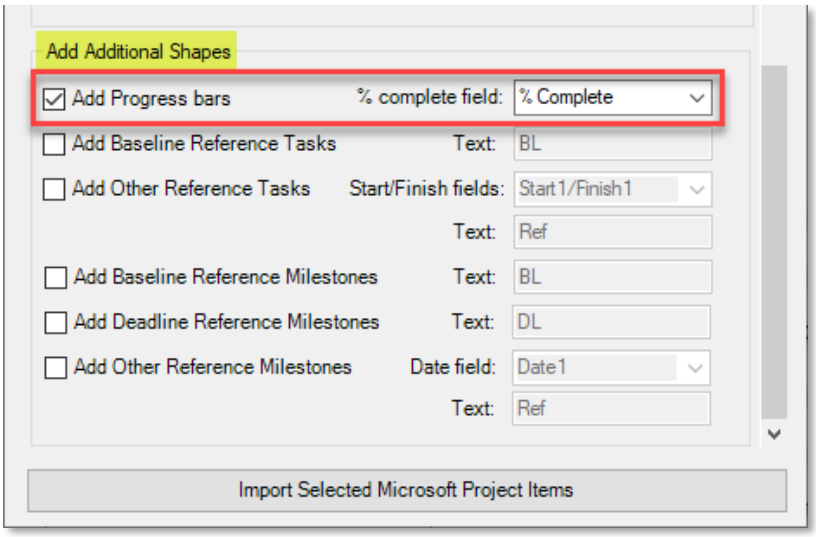
You can use the ***Text Tools*** to easily select progress bars on the current slide (see the part 2 training for more information on this tool).



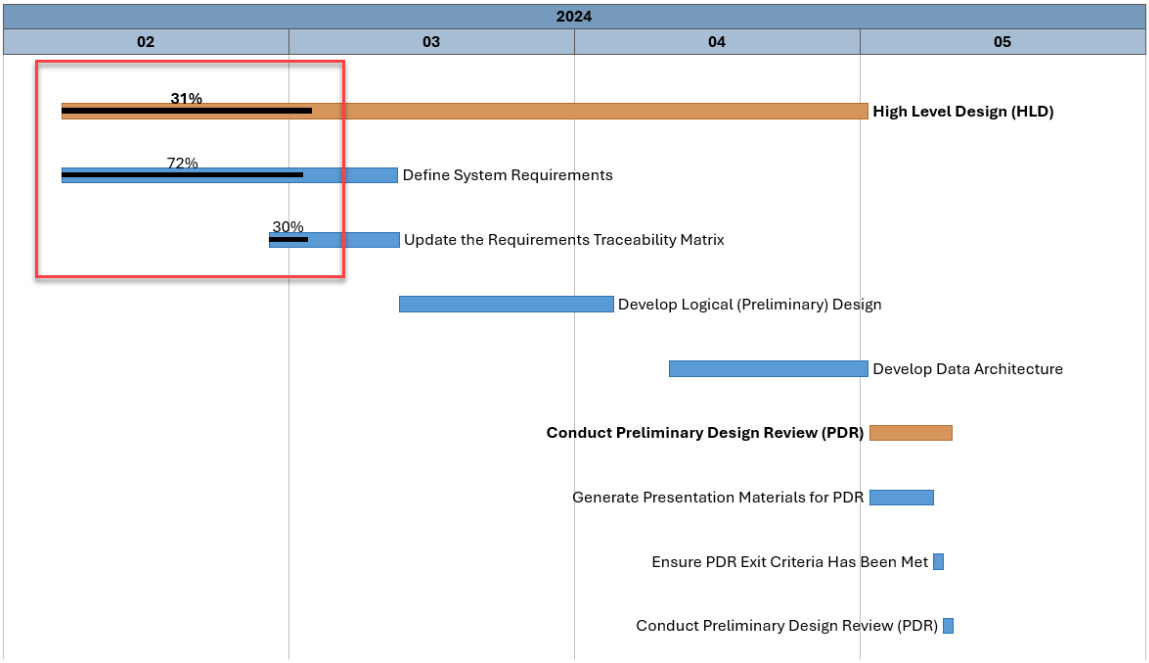
Class Exercise – Using the Status Date Tools

Start of Practice Exercise	
1. Go to Microsoft Project and open the SSI Example Project file.	
2. Insert the ***% Complete*** column in the Gantt Chart of the Example Project.	
3. Select rows 54 -62 in the Gantt chart like the image on the right →	

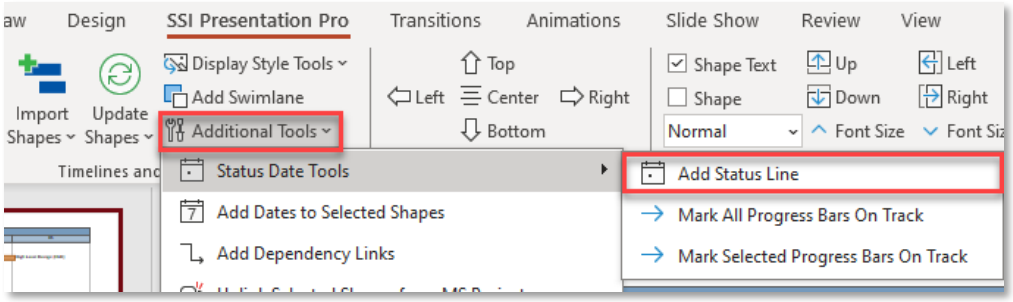
	Task Name	% Complete
54	High Level Design (HLD)	31%
55	Define System Requirements	72%
56	Update the Requirements Traceability Matrix	30%
57	Develop Logical (Preliminary) Design	0%
58	Develop Data Architecture	0%
59	Conduct Preliminary Design Review (PDR)	0%
60	Generate Presentation Materials for PDR	0%
61	Ensure PDR Exit Criteria Has Been Met	0%
62	Conduct Preliminary Design Review (PDR)	0%

4. In PowerPoint, add a new blank slide.	
5. 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***.	
6. On the ***Advanced Import form***, scroll down to the bottom and check the ***Add Progress bars*** option. Leave the ***% complete field*** set to "% Complete".	
7. Click the ***Import Selected Microsoft Project Items*** button at the bottom of the form.	

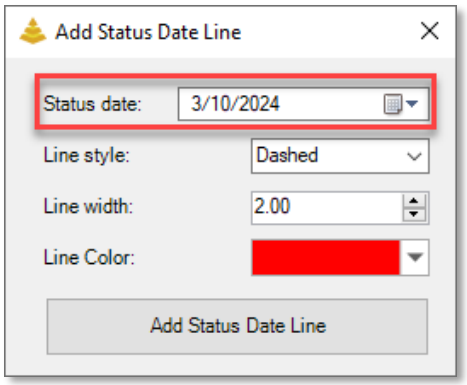
8. Observe the progress bars on the chart created:



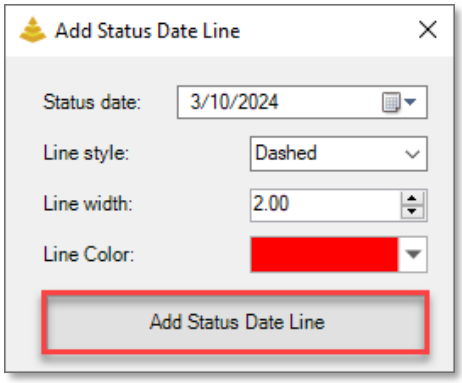
9. Open the ***Add Status Line Tool*** by clicking on the ***Add Status Line*** button in the ***Additional Tools menu*** in the ***SSI Presentation Pro Ribbon***:



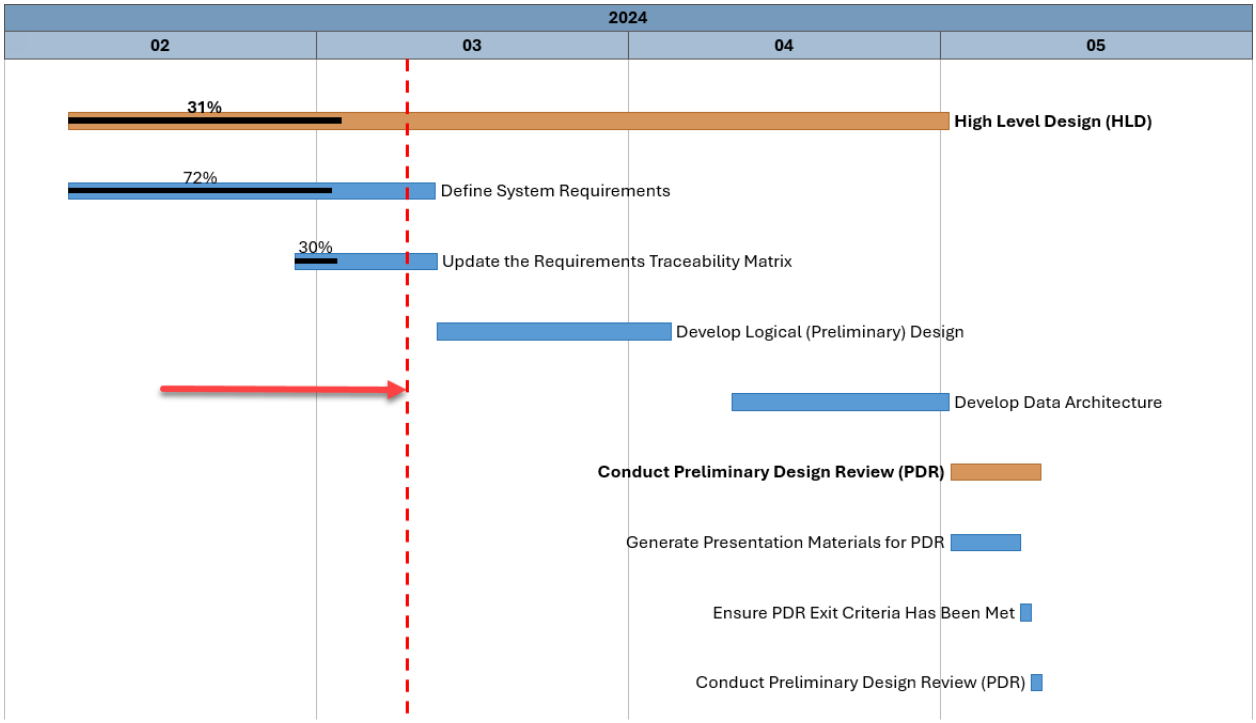
10. Set the status date control on the ***Add Status Line Tool*** to March 10th 2024. Adjust any other settings to your liking.



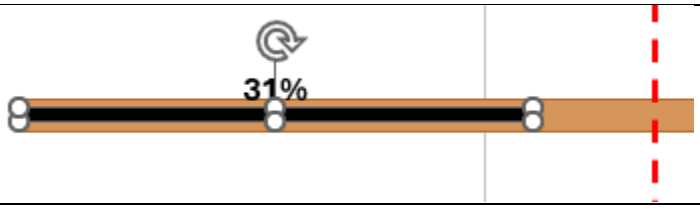
11. Create the status date line by clicking the ***Add Status Date Line*** button on the form.



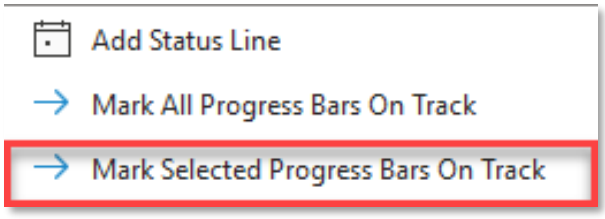
12. Observe the status date on the chart:



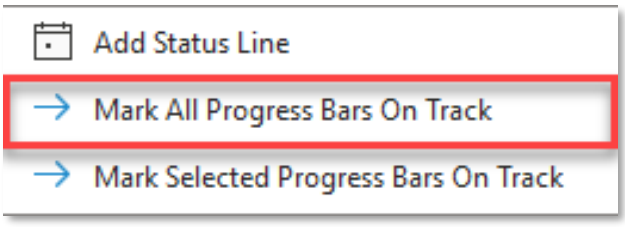
13. Select the first progress bar on the slide:



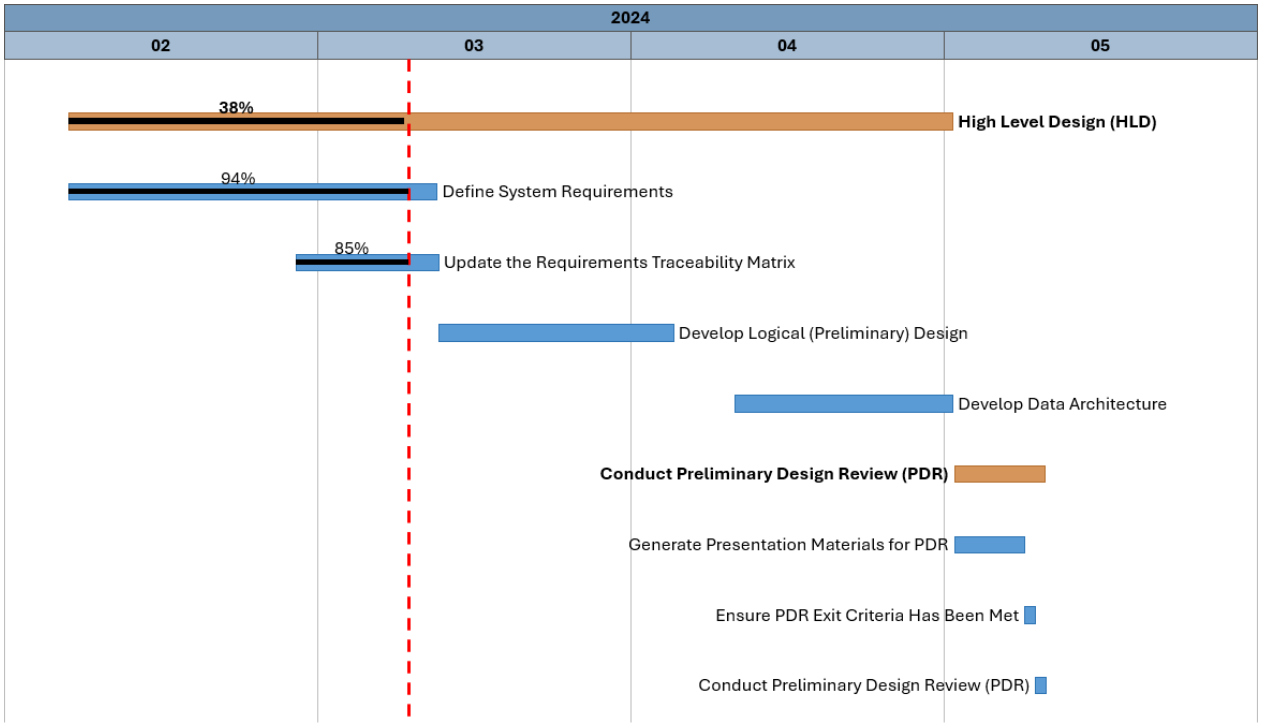
14. Mark the progress bar on track by using the ***Mark Selected Progress Bars on Track*** tool.



15. Mark the rest of the progress bars on the chart on track by using the ***Mark All Progress Bars on Track*** tool.



16. Observe the progress bars on the chart relative to the status date line:



End of Practice Exercise