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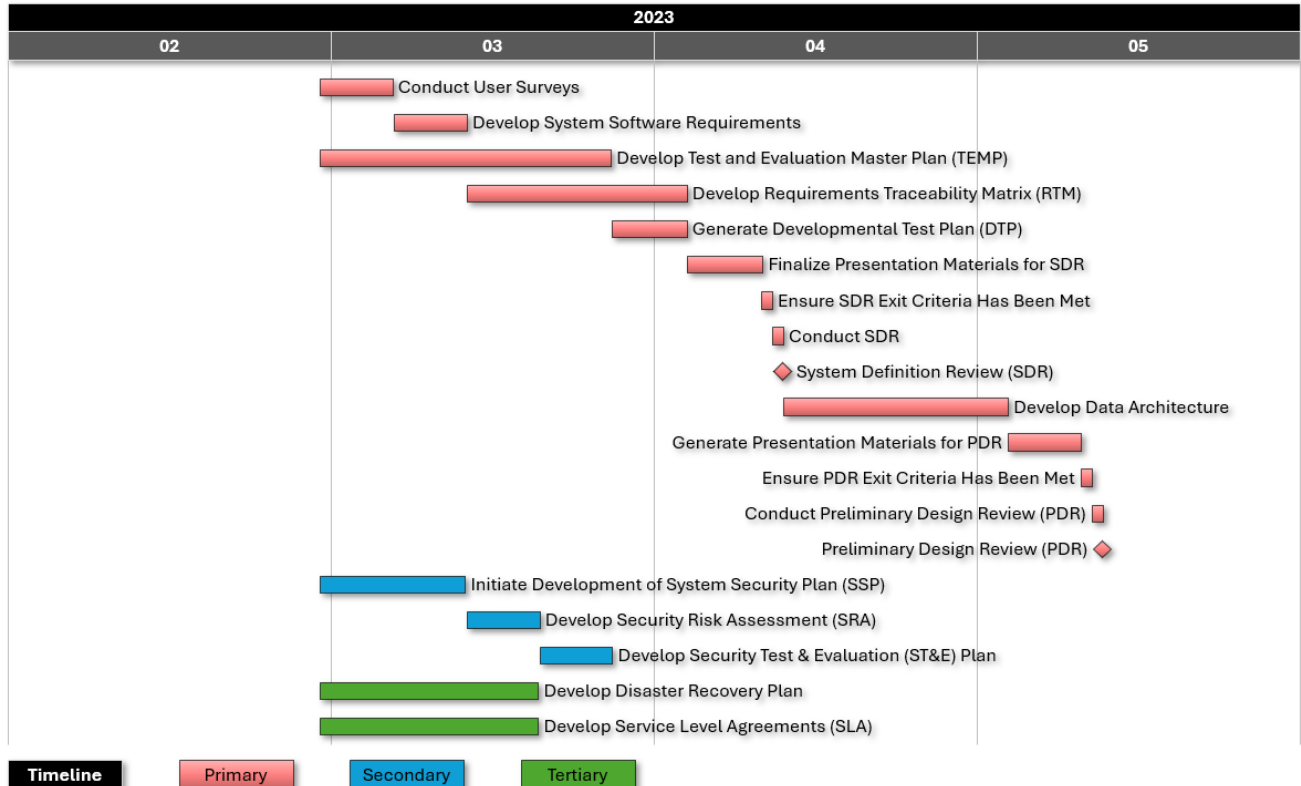
Presentation Professional – Working with Legends

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 use Legends in Presentation Professional, including:

- Matching Legend styles
- Add legends to your slide
- Adjusting Legend default styles
- Creating and using Custom Legends



Using Legends

Understanding Legend Shapes

Legends are specially coded shapes that can be created by Presentation Pro to easily control or modify the style of content on a slide. By default, legend shapes are automatically created by Presentation Pro when content is imported, but they can also be added beforehand.

Once a legend shape exists on a slide you can utilize any built in PowerPoint features to format its style.

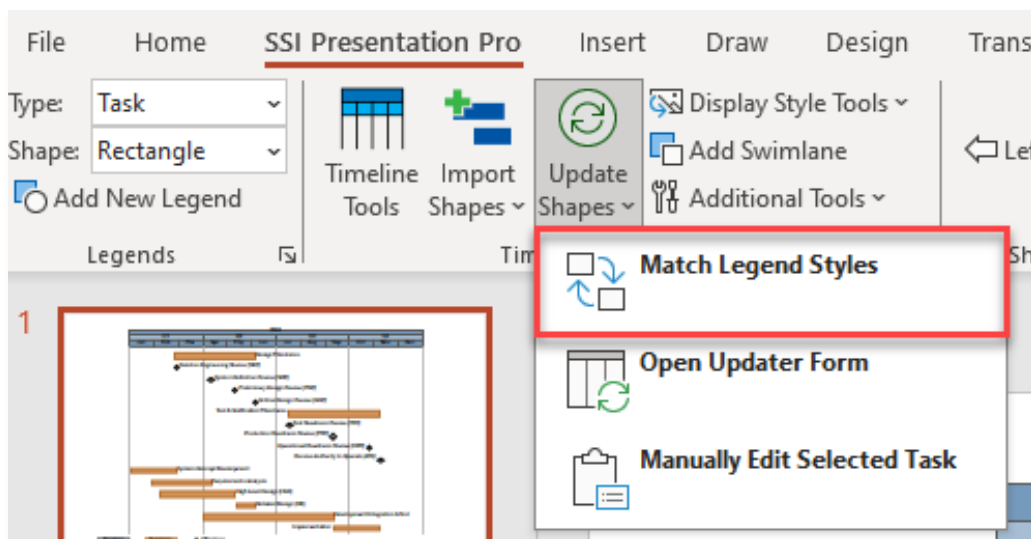
Legends can be utilized no matter where they are on a slide. You can rearrange the order legends appear on a slide and even move them into the space outside of the bounds of a slide. When legends are placed outside of a slide's boundaries, they will not be visible when the slide is in presentation mode or printed.

The text on legends does *not* need to be the same as the *type* of legend. For example, a *Milestone* legend's text can read "MS" instead of "Milestone". As stated, Presentation Pro applies a special coding to legend shapes, so it will be able to recognize what the legend is, no matter what the text reads.

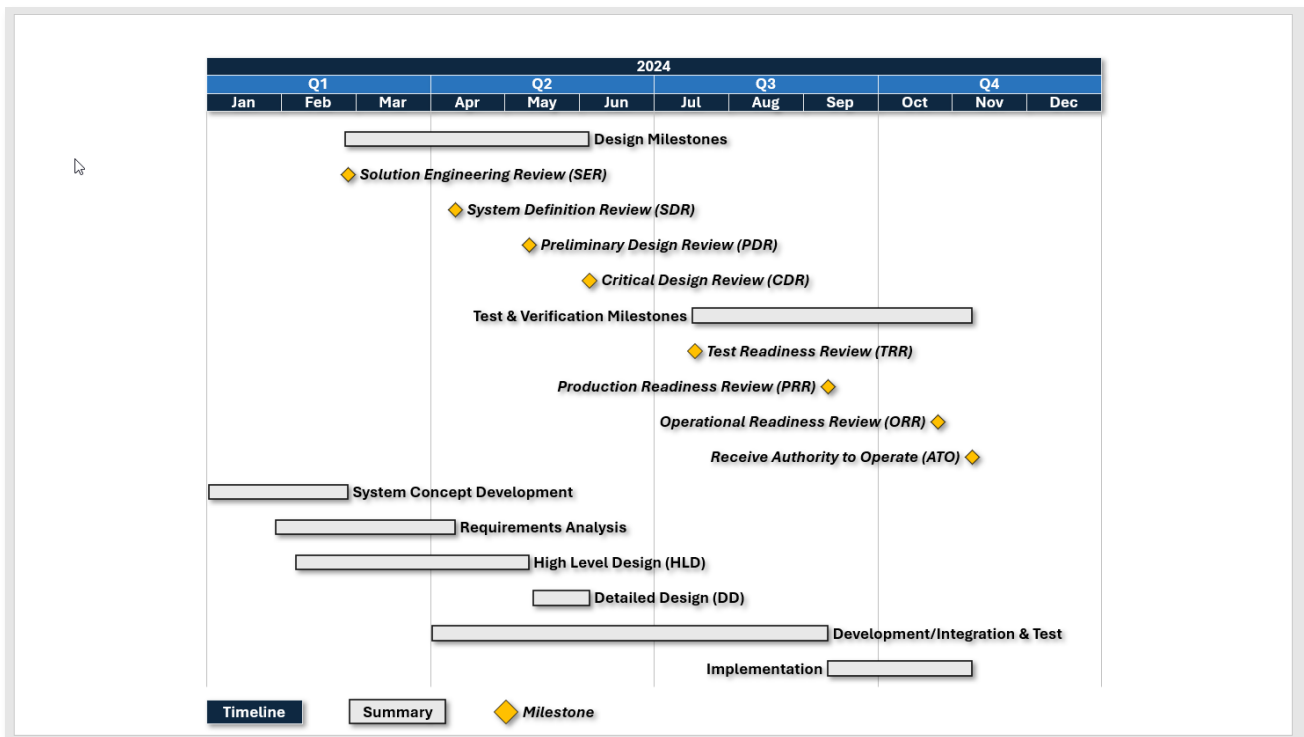
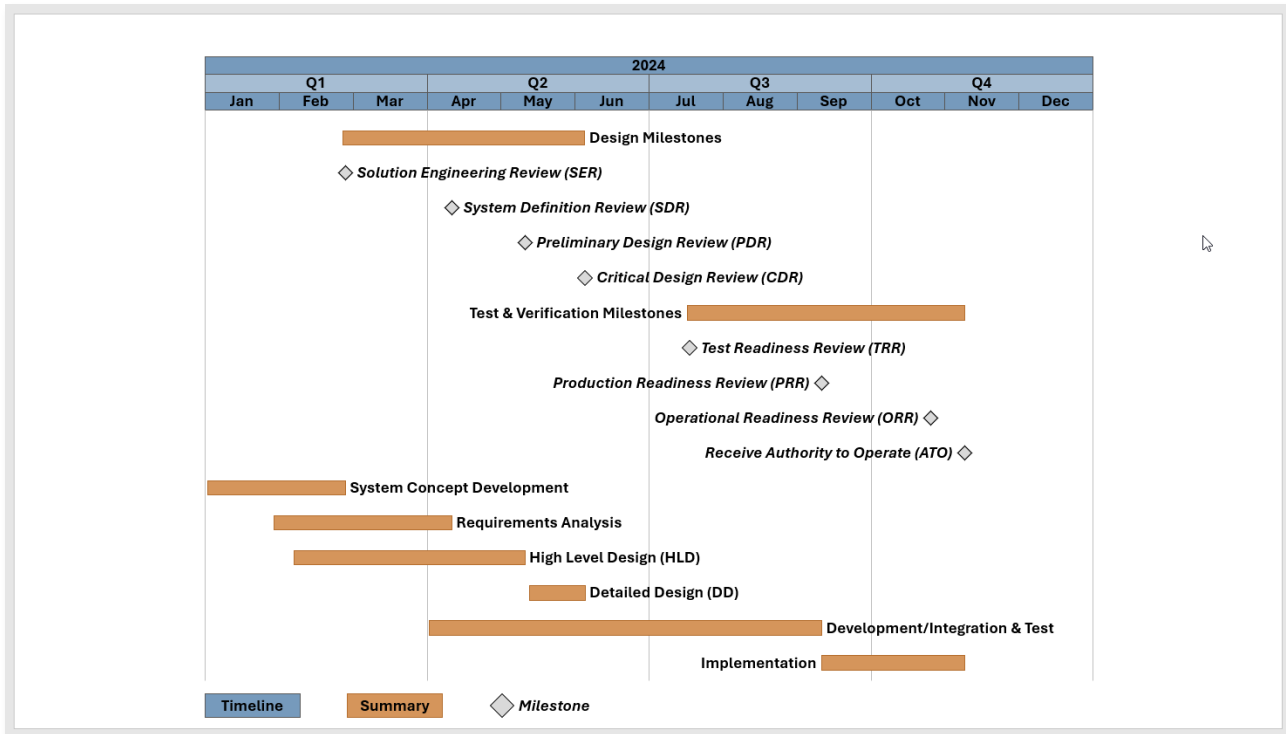
Presentation Pro *only* recognizes legend shapes it creates. In other words, you must use Presentation Pro to create your legends in order for them to work properly. Manually creating a shape and titling it "Summary" will not cause Presentation Pro to recognize it as a legend for *Summaries* on a slide.

Matching Legend Styles

It is extremely easy to match all content on a chart to its corresponding legends. Once the legends are styled to your liking, click the *lower half* of the **Update Shapes** button in the SSI Presentation Pro ribbon. This will open a menu, the first button in the menu being **Match Legend Styles**.



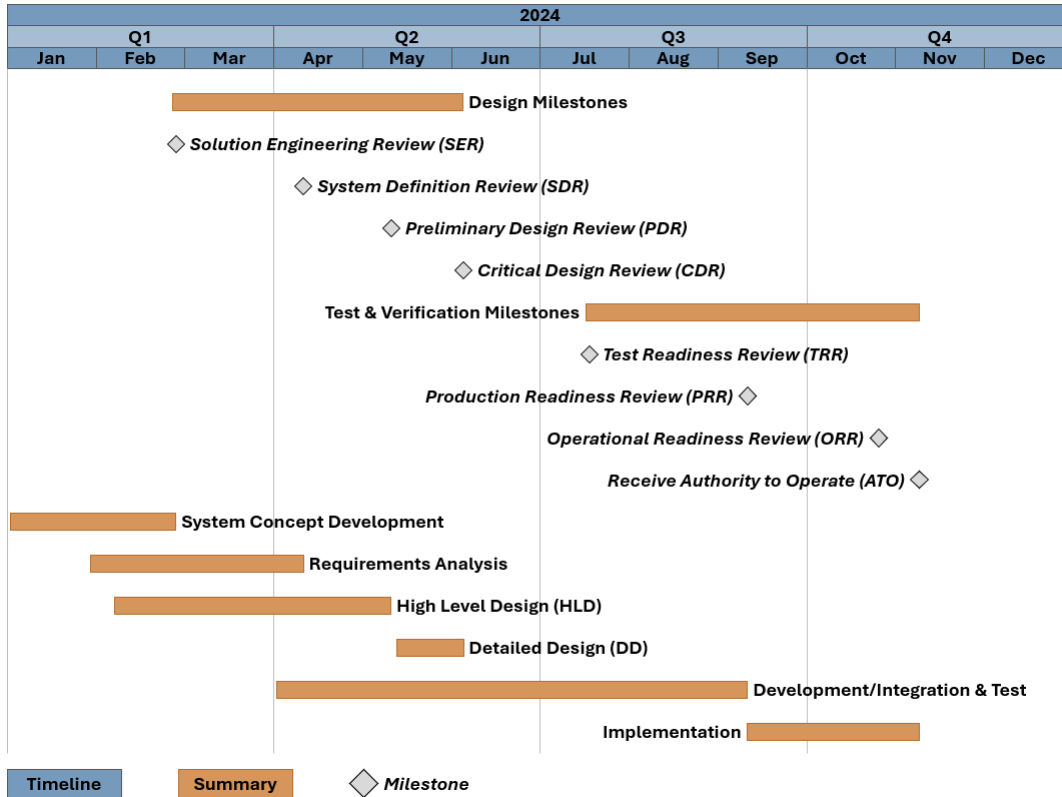
Click this button to match all elements on the current slide to its corresponding legend.



Class Exercise – Matching Legend Styles

Start of Practice Exercise

- Return to one of the Presentation Pro charts created in previous exercises



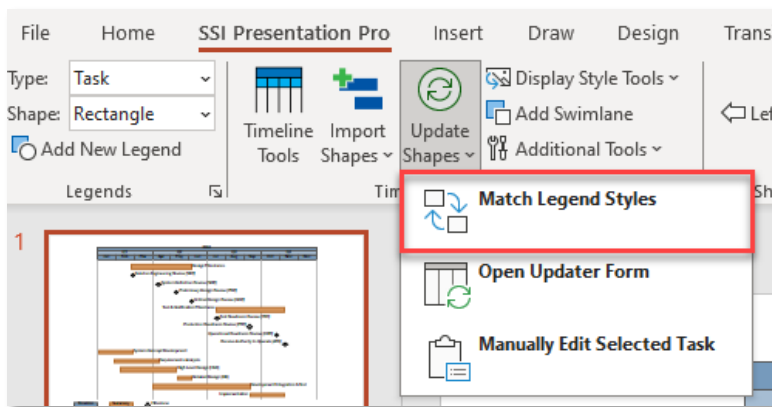
- Modify the colors and styles of the legends on the slide anyway you'd like. Here's an example:

Timeline

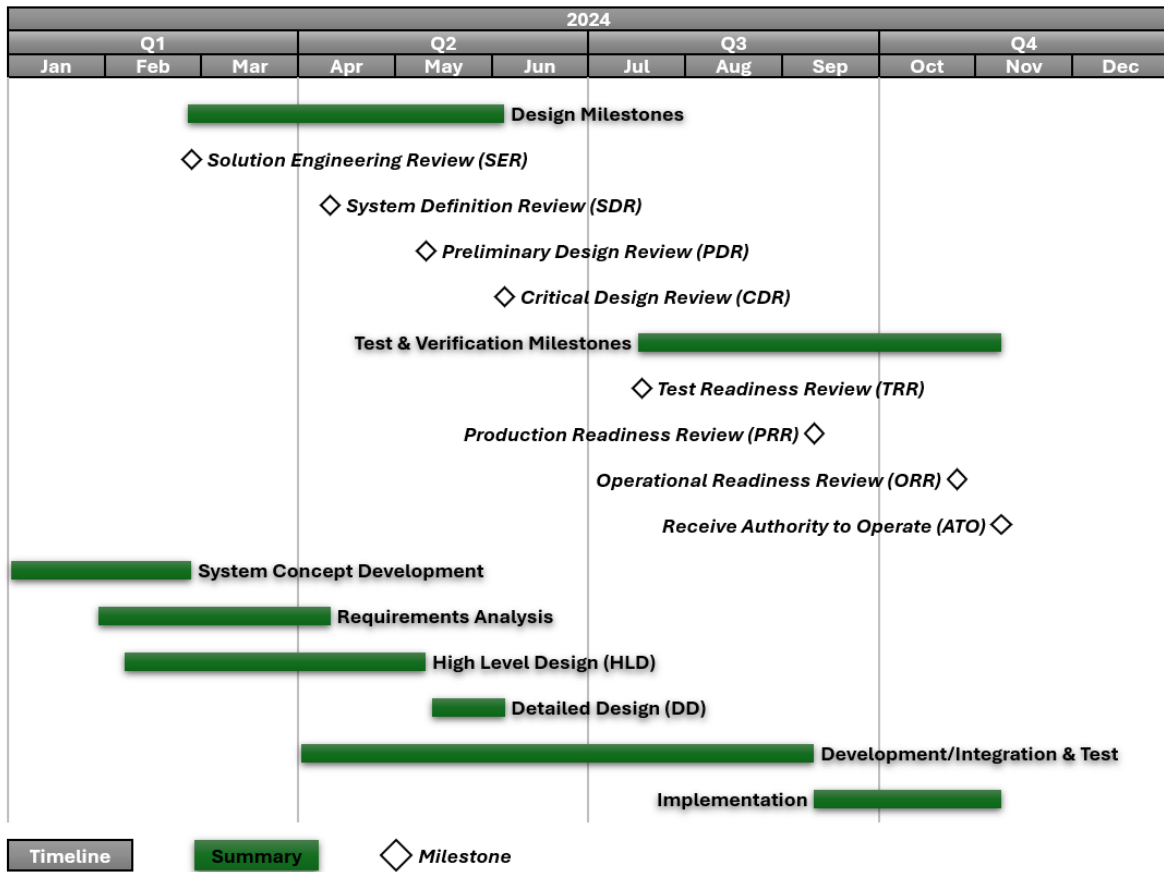
Summary

Milestone

- Click the lower half of the *Update Shapes* button. Then click the *Match Legend Styles* button.



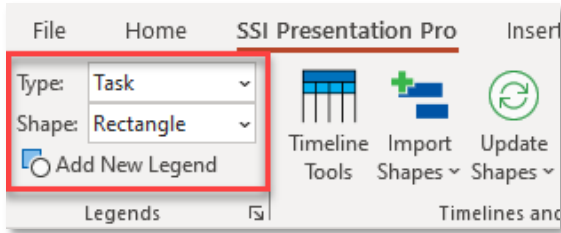
4. Notice how the content on the chart changes to match the legend styles



End of Practice Exercise

Manually Adding Legends to a Slide

By default, legend shapes are automatically added to a slide when content is imported, but they can also be manually added before content is imported onto a slide by using the controls in the **Legends Group** on the **SSi Presentation Pro Ribbon**.



In the **Legends Group** there are three controls:

- The **Type** selection box
- The **Shape** selection box
- The **Add New Legend** button

The following **Legend Types** come standard with Presentation Pro and can be selected from the **Type** selection box:

- Task
- Summary
- Milestone
- Task Complete (used to distinguish 100% complete Tasks from incomplete Tasks)
- Summary Complete (used to distinguish 100% complete Summaries from incomplete Summaries)
- Milestone Complete (used to distinguish 100% complete Milestones from incomplete Milestones)
- Timeline

The **Shape** options can change depending on the **Type** option is set to **Milestone** or **Milestone Complete**.

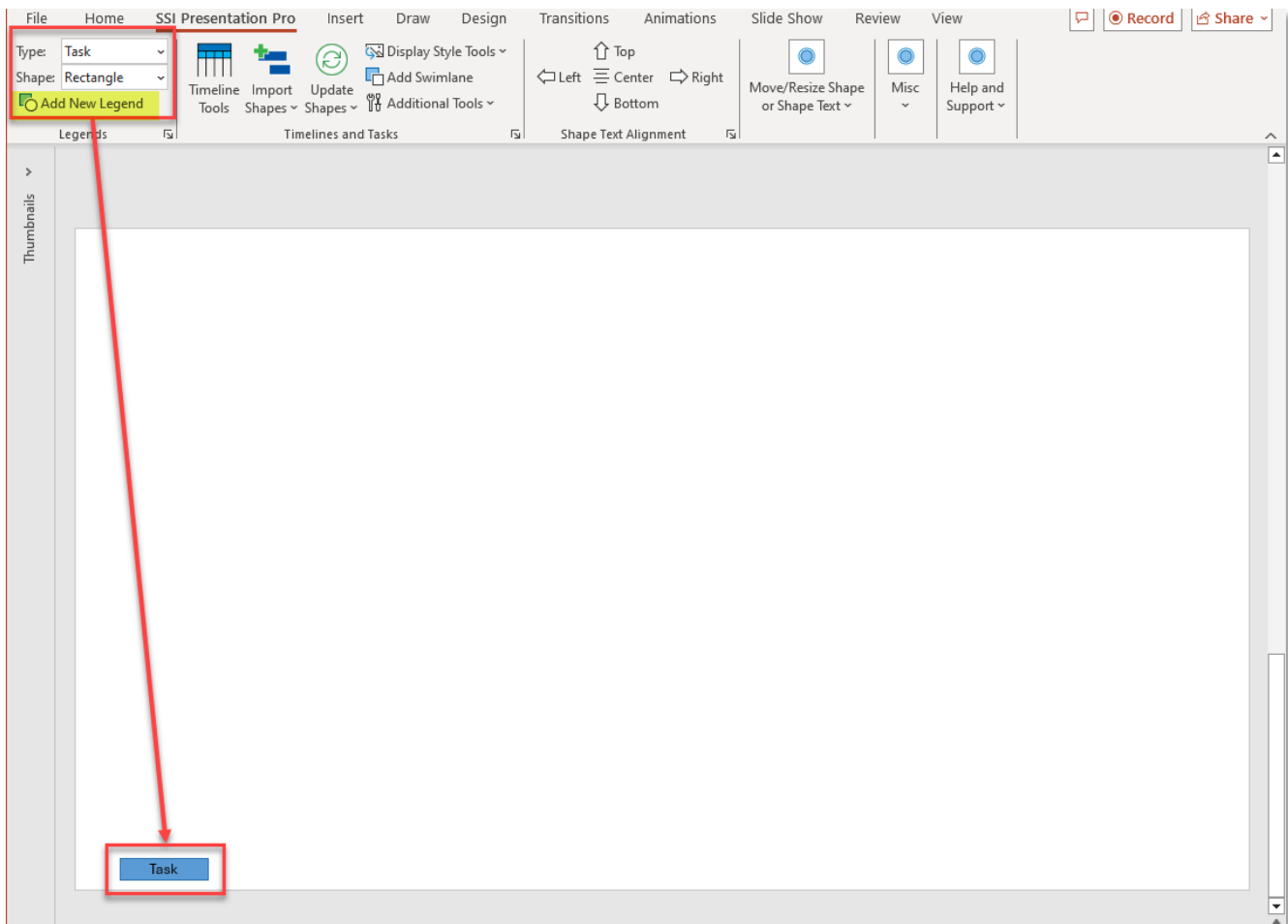
The options for non-milestone legends are the following:

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

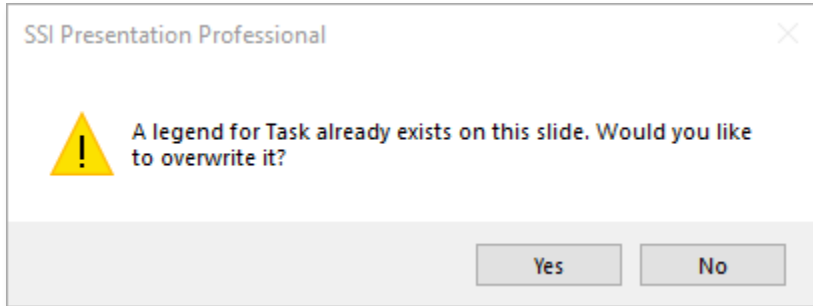
The options for Milestone legends are:

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

When the **Add New Legend** button is clicked, a new legend shape of the **Type** selected in the **Shape** selected will be added to the slide. For example, if **Add New Legend** is clicked while the **Type** is set to 'Task' and the **Shape** is set to 'Rectangle', a **Task** legend in the shape of a normal rectangle will be added to the current slide.



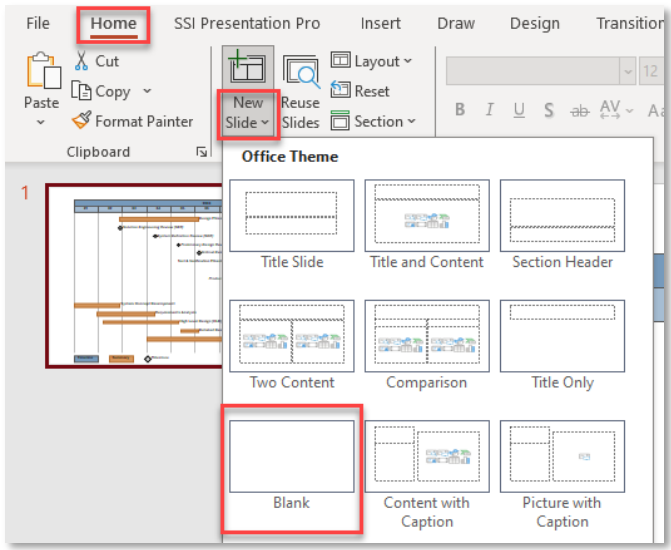
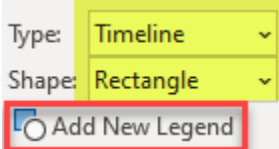
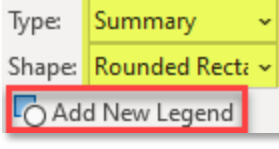
If the same **Type** of legend already exists on the current slide when the **Add New Legend** button is clicked, a message box will appear asking if Presentation Pro can overwrite, or replace, the existing legend shape on the slide with the new one:



Clicking **Yes** will replace the existing legend shape. Clicking **No** will cancel.

Added legends will always follow their default styles, but they can be formatted however you'd like after they are on the slide. Content added afterwards will follow the style of the legends that exist on the slide it is being added to, even if the legends have been changed from their default styles.

Class Exercise – Manually adding legends before adding other content

Start of Practice Exercise	
1. In the same presentation as the previous exercises, add a new blank slide	
2. Add a Timeline legend in the shape of a Rectangle to the slide using the Legend Group in the SSI Presentation Pro Ribbon.	 
3. Add a Summary legend in the shape of a Rounded Rectangle to the slide using the Legend Group in the SSI Presentation Pro Ribbon.	 
4. Add a Milestone legend in the shape of a Down Triangle to the slide using the Legend Group in the SSI Presentation Pro Ribbon.	 
5. Modify the colors and styles of the legends you added anyway you'd like. Here's an example:	

6. Create a timeline on the slide using the *Timeline Tools*. Use the options from the images to the right →

Timeline Basics

Timeline format: Monthly

Timeline start: 01/2024

Timeline finish: 12/2024

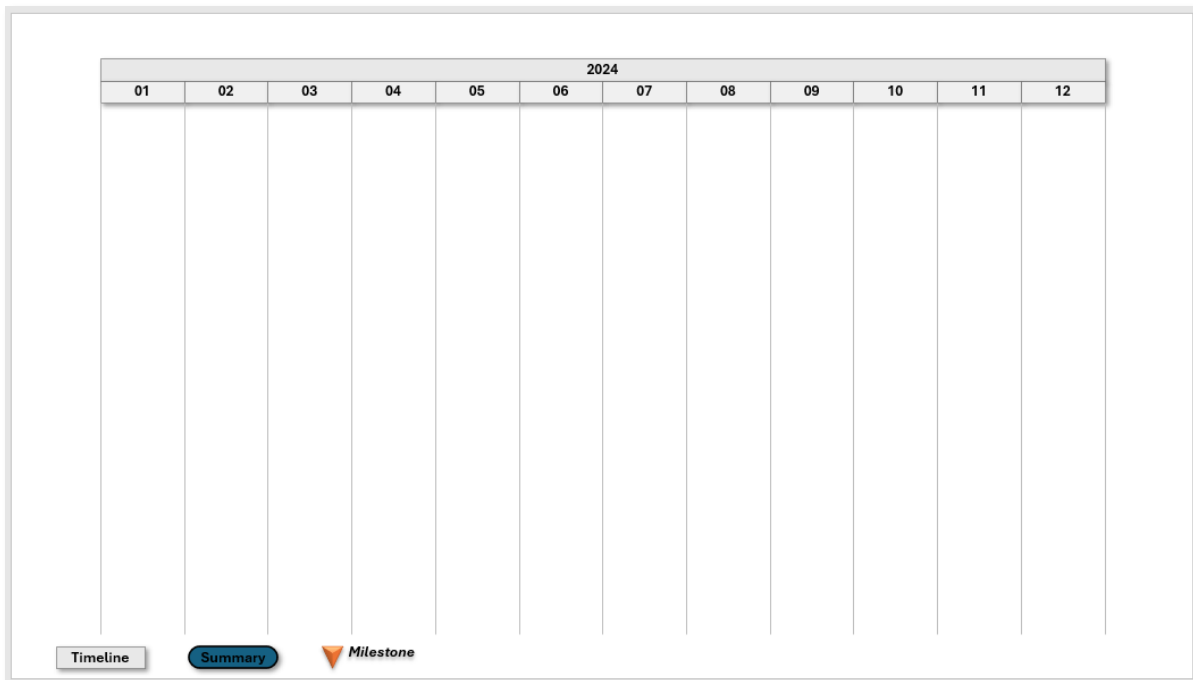
☒ Add year labels as top row

Timeline Shape Style

☒ Follow timeline legend style

☒ Use contrasting shades

7. Notice the created timeline follows the same style as the Timeline Legend on the slide



8. Return to the SSI Example Project in Microsoft Project and select the tasks shown in the image on the right →

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

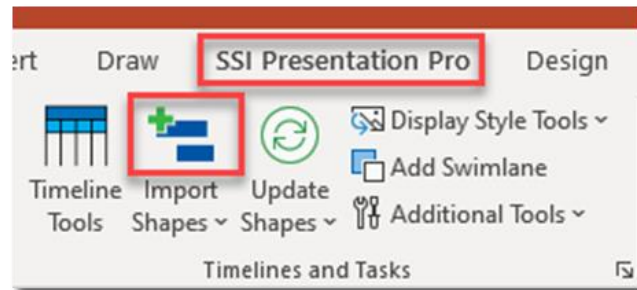
High Level Design (HLD)

Detailed Design (DD)

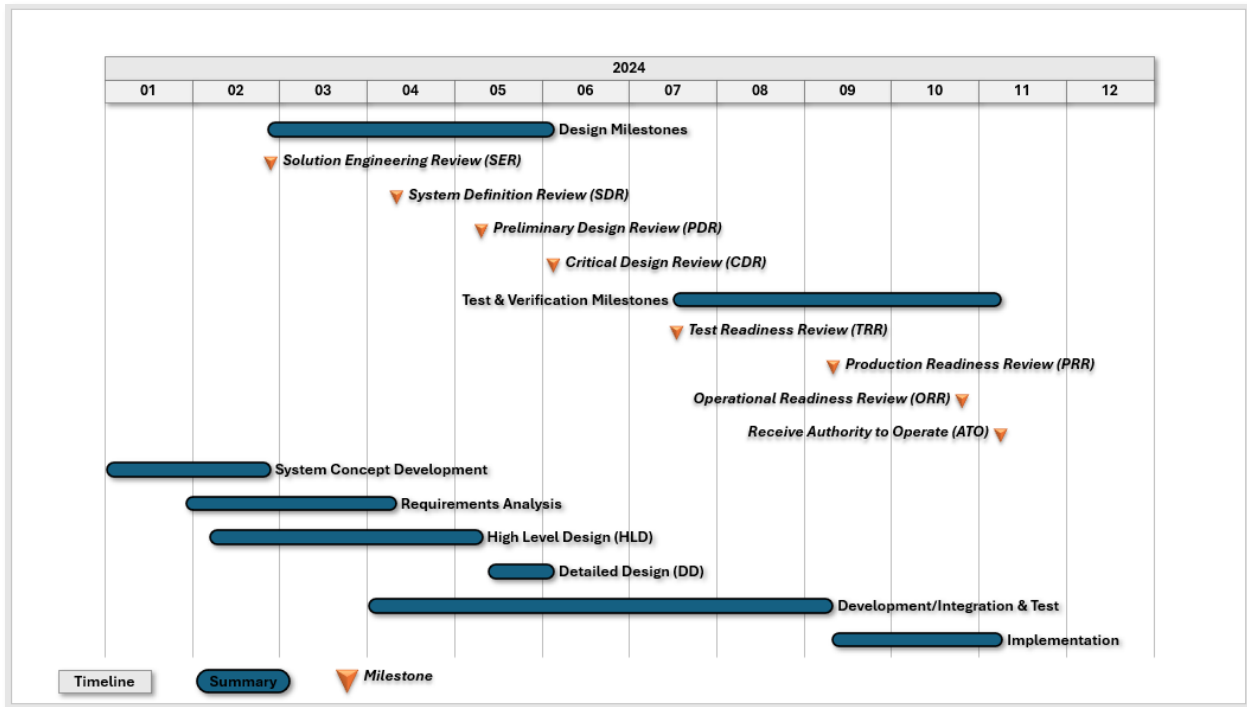
Development/Integration & Test

Implementation

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



10. Notice the content imported follows the same Summary and Milestone legend styles



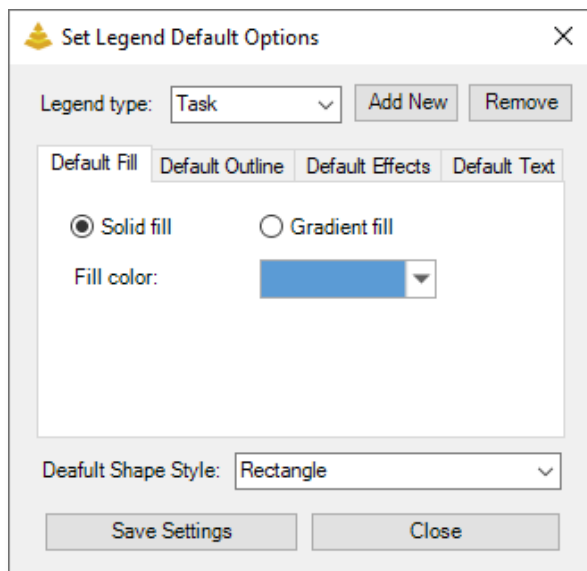
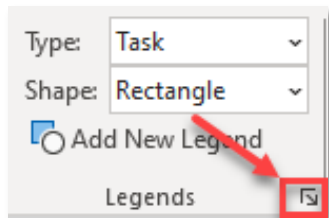
End of Practice Exercise

Setting Legend Default Styles

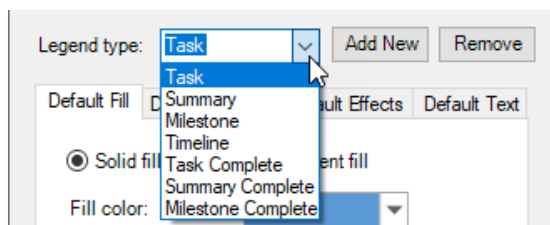
As discussed in Part 1 of this training, legends are specially coded Presentation Pro shapes that allow you to easily control or modify the style of content on a slide. Each legend comes with a default style that determines its appearance when added to a slide and influences the style of new content if no legend is already present. You can customize the default style of a legend to suit your preferences.

Using the Legend Default Options Form

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

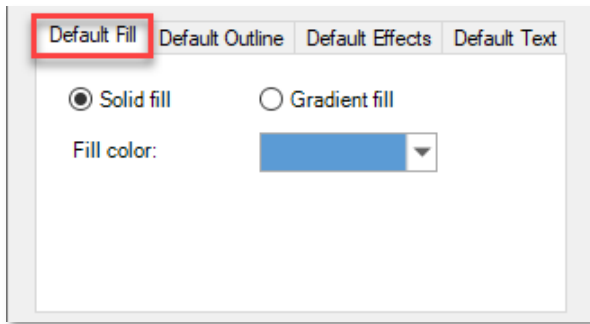


Click the *Legend Type* drop-down menu to control which legend's style is being updated.



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

Default Fill Tab



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

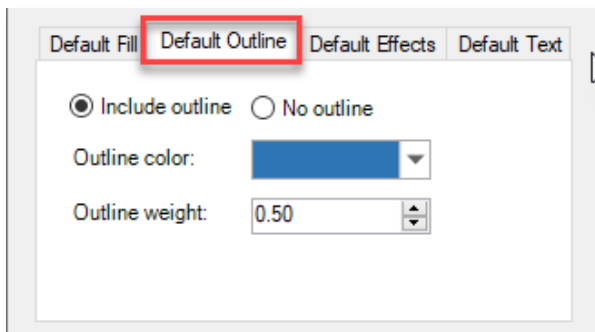
1. Solid Fill / Gradient Fill Radio Buttons

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

2. Fill Color Dropdown

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

Default Outline Tab



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

1. Include Outline / No Outline Radio Buttons

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

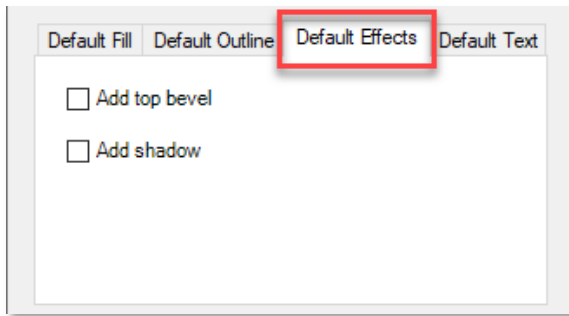
2. Outline Color Dropdown

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

3. Outline Weight Dropdown

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

Default Effects Tab



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

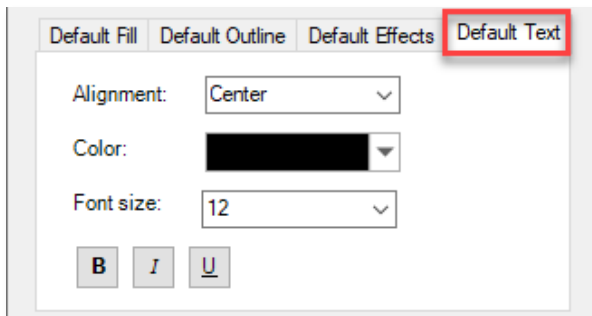
1. Add Top Bevel Checkbox

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

2. Add Shadow Checkbox

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

Default Text Tab



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

1. Alignment Dropdown

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

2. Color Dropdown

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

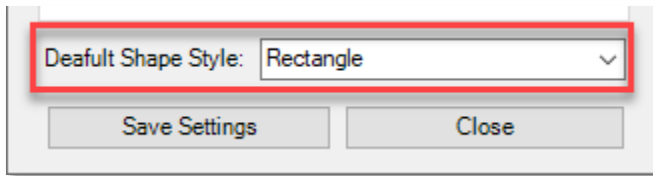
3. Font Size Dropdown

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

4. Text Style Buttons

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

Default Shape Style



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

The options for non-milestone legends are the following:

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

The options for Milestone legends are:

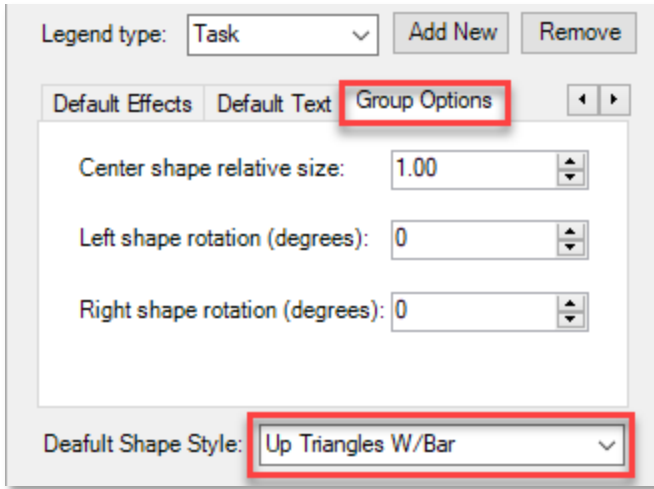
- Diamond: 
- Star: 
- Up Triangle: 
- Down Triangle: 
- Circle/Oval: 
- Up Arrow: 
- Down Arrow: 

Additional Options for Grouped Shape Styles

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

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

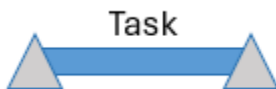
Group Options Tab



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

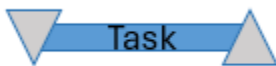
1. Center Shape Relative Size

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



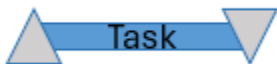
2. Left Shape Rotation (Degrees)

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

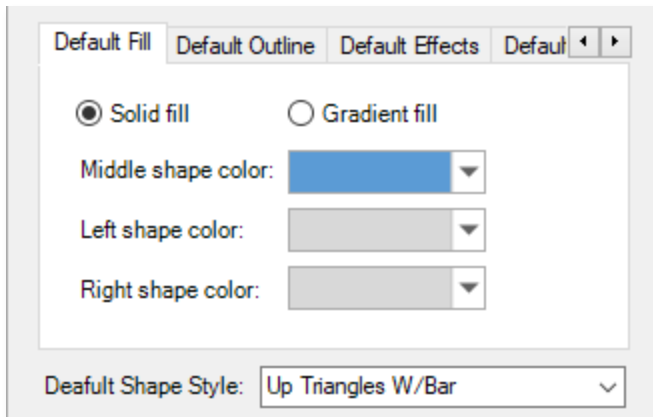


3. Right Shape Rotation (Degrees)

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



Additional Fill Options

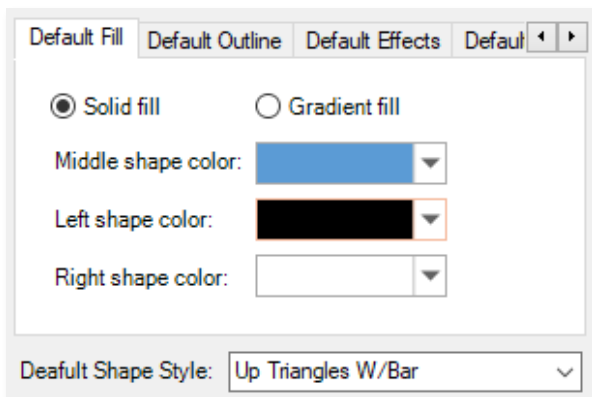


When the default shape style is set to a grouped shape style, the **Default Fill tab** changes to include additional fill options for the left and right shapes. These new controls allow for more detailed customization of the grouped shapes.

Updated Controls in the Default Fill Tab:

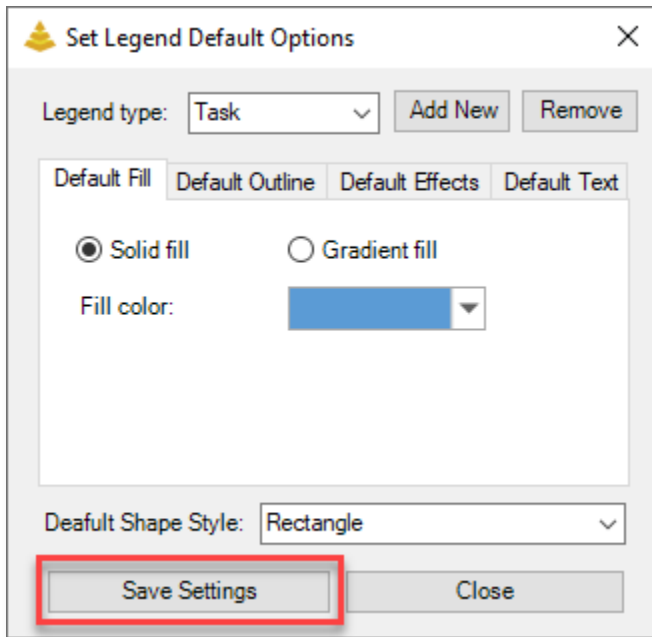
1. **Middle Shape Color Dropdown**
 - **Middle Shape Color:** This dropdown allows you to choose the fill color for the middle shape in the grouped style. Clicking the dropdown will open a color picker to select your desired color.
2. **Left Shape Color Dropdown**
 - **Left Shape Color:** This dropdown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

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



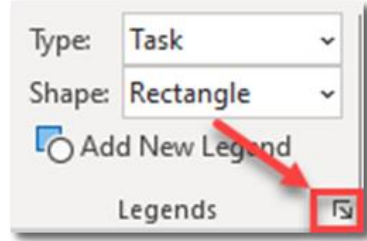
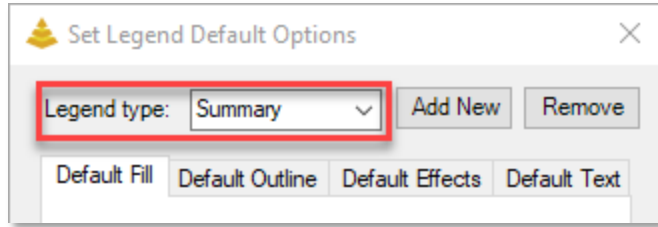
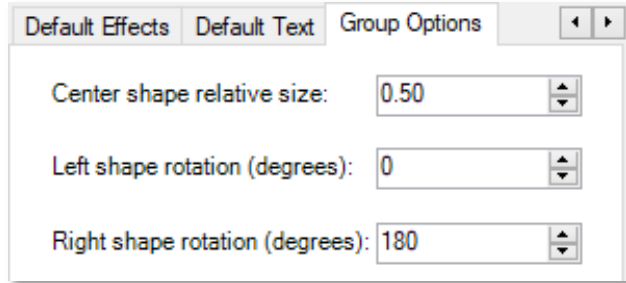
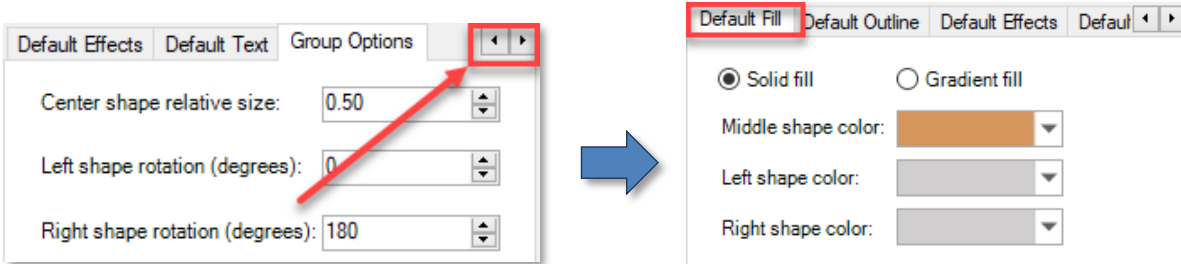
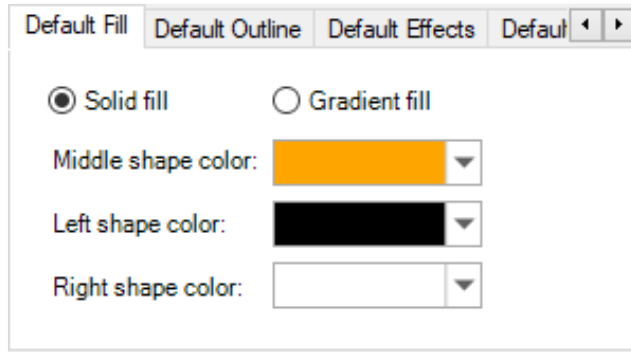
Saving Default Styles

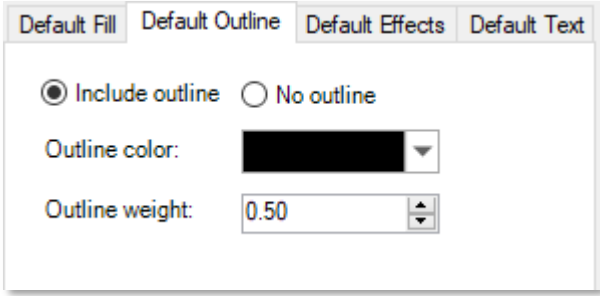
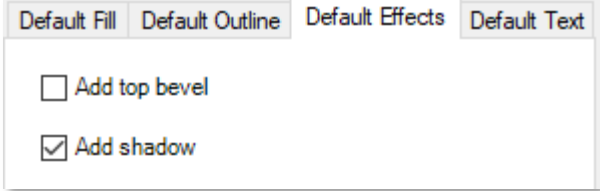
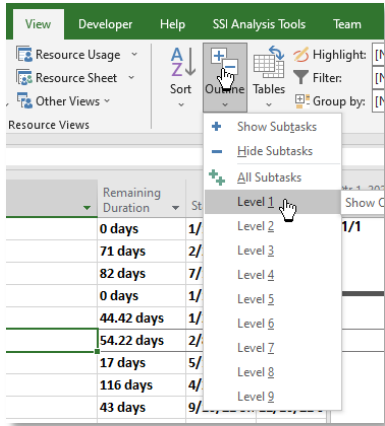
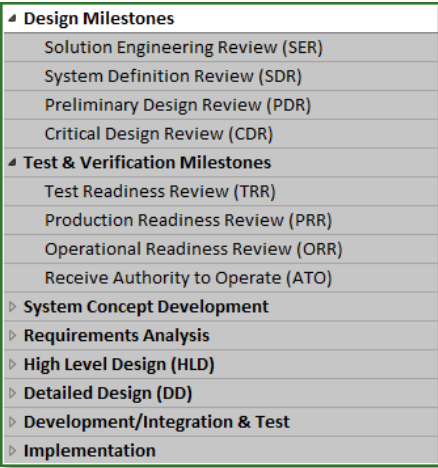
To save the styles for your legends, click the **Save Settings** button.



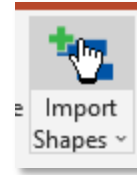
This action saves the styles for all legends in the list. Therefore, if you modify one legend, you don't need to save before changing the legend type in the dropdown menu. You can save after making changes to any number of legends.

Class Exercise –Using Grouped Shape Type Options

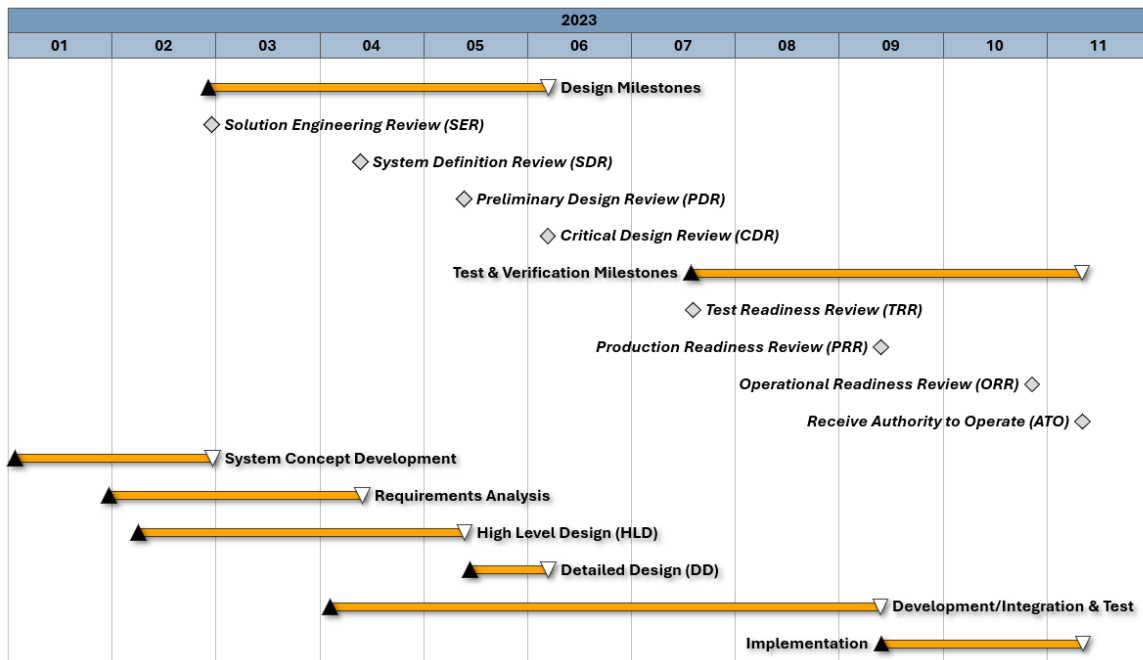
Start of Practice Exercise	
1. In PowerPoint, open the Legend Default Options form by clicking the button in the lower-right corner of the Legends Group in the SSi Presentation Pro Ribbon .	
2. Change the Legend Type drop-down selection to Summary .	
3. Change the Default Shape Style to Up Triangles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

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

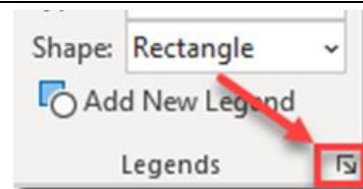
12. Navigate back to PowerPoint and open a blank slide. Then click the top half of the **Import Shapes** button in the **SSI Presentation Pro Ribbon**.



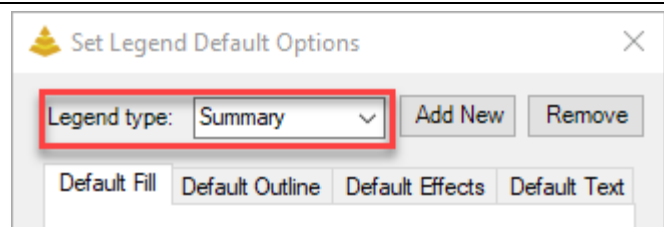
13. Observe the style of summaries on the slide follow the default style:



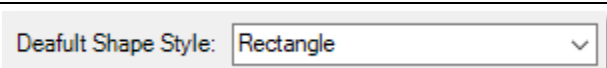
14. Reopen the **Legend Default Options form** by clicking the button in the lower-right corner of the **Legends Group** in the **SSI Presentation Pro Ribbon**.



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



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



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



End of Practice Exercise

Working with Custom Legends

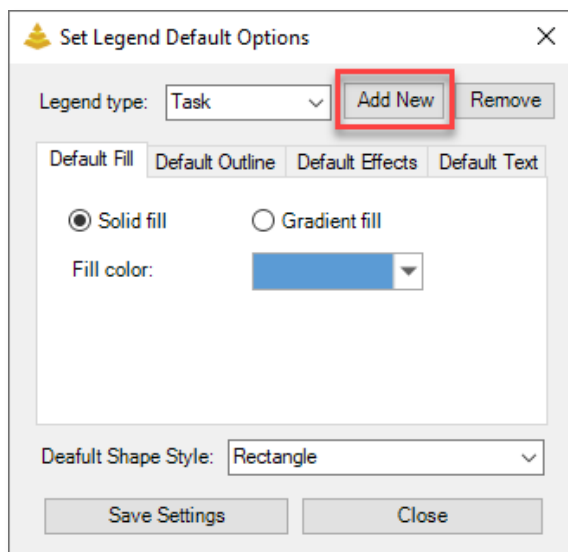
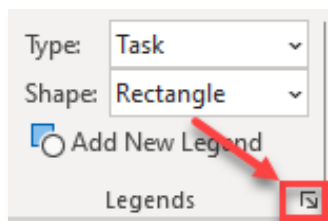
The following **Legends** can be used out of the box with Presentation Pro:

- Task
- Summary
- Milestone
- Task Complete (used to distinguish 100% complete Tasks from incomplete Tasks)
- Summary Complete (used to distinguish 100% complete Summaries from incomplete Summaries)
- Milestone Complete (used to distinguish 100% complete Milestones from incomplete Milestones)
- Timeline

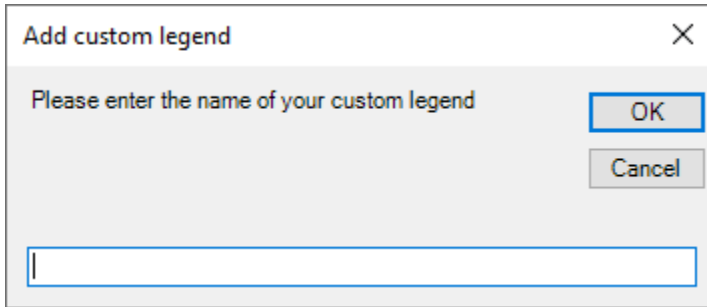
In addition to these types, Presentation Pro allows you to create any number of custom legend types to classify Tasks shapes. Custom legends allow you to distinguish content on a slide by various attributes beyond the standard categories of Task, Summary, or Milestone, which are the primary activity types in Microsoft Project.

Creating Custom Legends

Custom legends can be created by clicking the **Add New** button the **Legend Default Options form**



After clicking the **Add New** button, you will be prompted to name the custom legend:

A dialog box titled "Add custom legend" with a close button (X) in the top right corner. Inside the dialog, there is a text prompt "Please enter the name of your custom legend" followed by an "OK" button and a "Cancel" button. Below the buttons is a text input field.

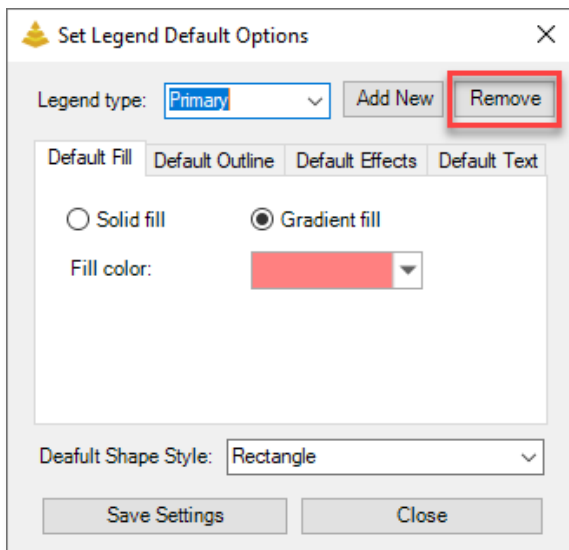
The name can be anything you choose, but it must adhere to these restrictions:

- It cannot exceed 50 characters in length.
- It cannot contain any commas (',') or slashes ('/').
- It must be unique and not duplicate the name of any existing legend.

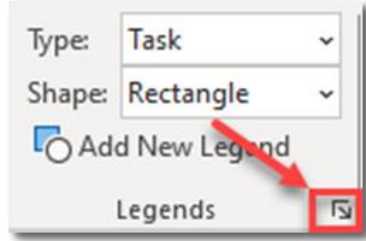
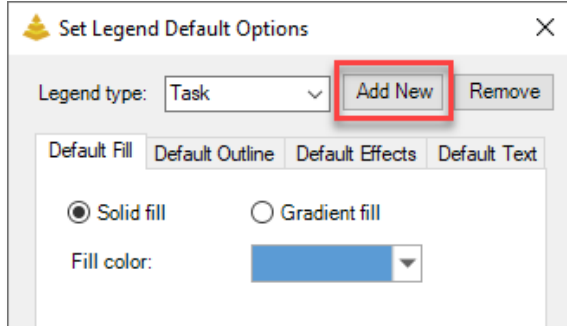
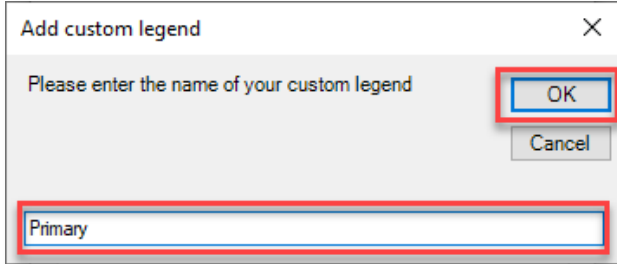
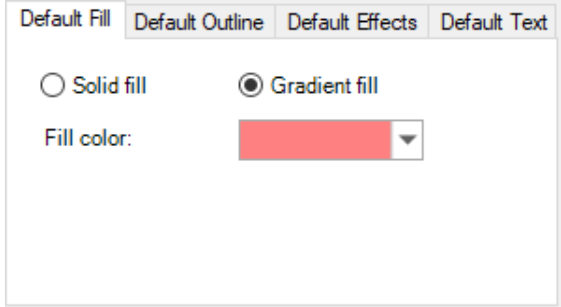
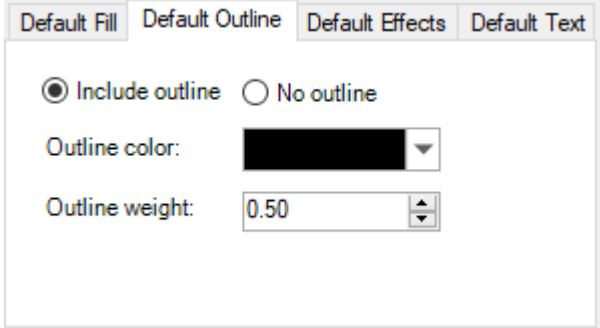
It is recommended that you avoid including any part of an existing legend's name in the new custom legend's name. For example, avoid naming a legend "key milestone" because it contains the word "milestone", which is already the name of an existing legend.

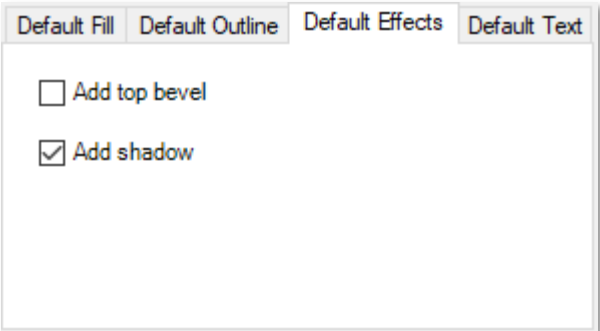
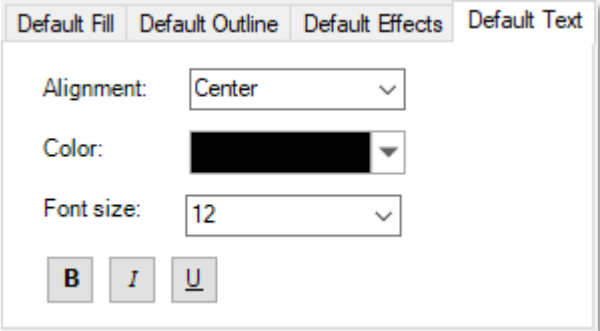
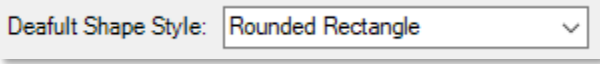
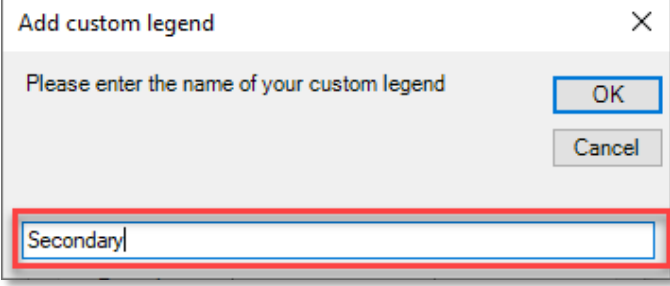
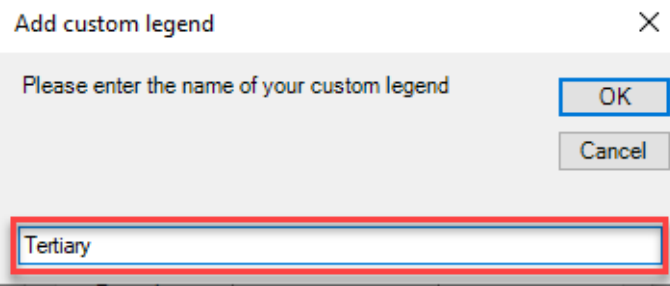
Once a new custom legend has been added to the list of legends, it can be customized in the **Legend Default Options form** just like any other legend. Since Presentation Pro cannot determine if the custom legend is intended for milestones, any shape style—whether for milestones or non-milestones—can be set as the custom legend's default shape style.

A custom legend can be removed from the legends list by clicking the **Remove** button on the **Legend Default Options** form. The custom legend being removed must be selected from the **Legend Type** drop-down menu.

A dialog box titled "Set Legend Default Options" with a close button (X) in the top right corner. It features a "Legend type:" dropdown menu currently set to "Primary", with "Add New" and "Remove" buttons to its right. The "Remove" button is highlighted with a red rectangle. Below this are four tabs: "Default Fill", "Default Outline", "Default Effects", and "Default Text". The "Default Fill" tab is active, showing radio buttons for "Solid fill" and "Gradient fill" (which is selected). Below these is a "Fill color:" label and a red color swatch. At the bottom, there is a "Default Shape Style:" dropdown menu set to "Rectangle", and "Save Settings" and "Close" buttons.

Class Exercise –Creating Custom Legends

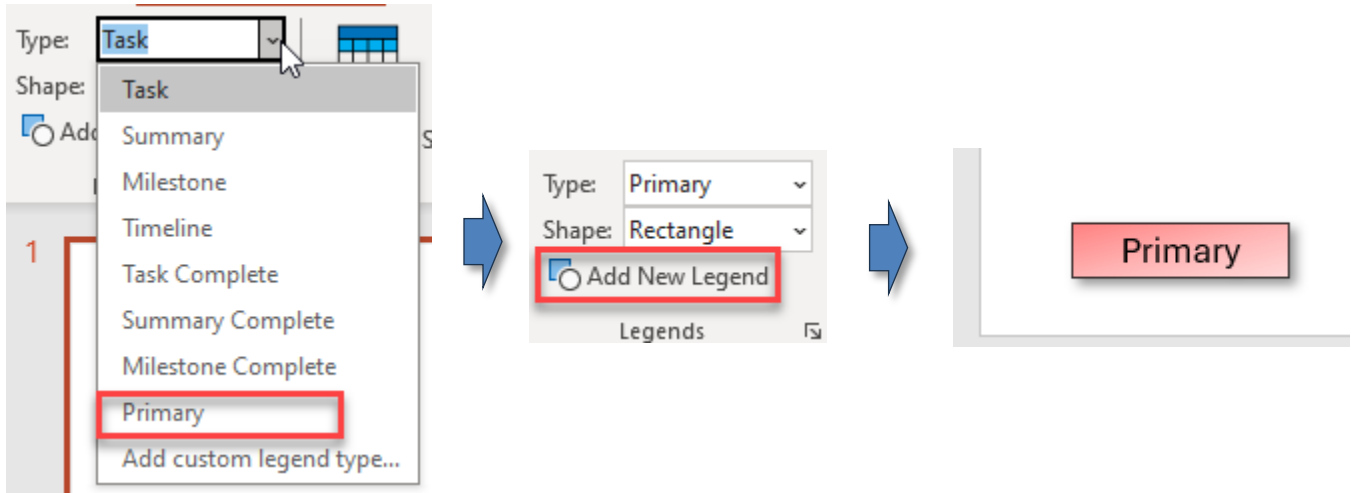
Start of Practice Exercise	
1. In PowerPoint, open the Legend Default Options form by clicking the button in the lower-right corner of the Legends Group in the SSI Presentation Pro Ribbon .	
2. On the Legend Default Options form click the Add New button.	
3. Type "Primary" in the legend name input box, then click OK .	
4. Edit the Default Fill options to anything you'd like.	
5. Edit the Default Outline options to anything you'd like.	

6. Edit the <i>Default Effects</i> options to anything you'd like.	
7. Edit the <i>Default Text</i> options to anything you'd like.	
8. Set the <i>Default Shape Style</i> option to <i>Rounded Rectangle</i> .	
9. Repeat steps 2-8, but name the new custom legend "Secondary".	
10. Repeat steps 2-8, but name the new custom legend "Tertiary".	
11. Save the default legend styles by clicking the <i>Save Settings</i> button on the bottom left of the <i>Legend Default Options form</i> .	
End of Practice Exercise	

Using Custom Legends

Custom legends can be added to a slide just as any other legend by being selected in the *Type* drop-down menu and then clicking the **Add New Legend** button in the *Legends group*.

In the image below “Primary” has been added as a custom legend:



As is the case with any other legend, once a custom legend is on a slide, it can be formatted however you'd like using any built in PowerPoint features.

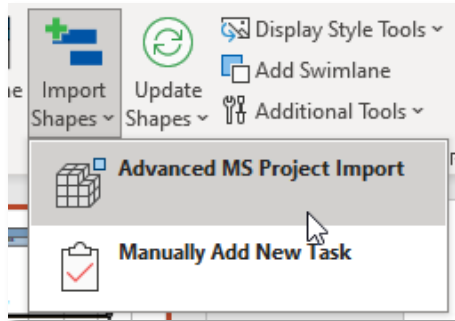
Simply adding a custom legend to a slide does not inform Presentation Pro which shapes to code as custom legend types when importing items from Microsoft Project. To enable Presentation Pro to code items by custom legend types, you need to specify this. There are four ways to do this:

1. Changing the **Project Field to Code Task Types** on the Advanced Import form
2. Using advanced options in the **Updater Form** to update task types on Update
3. Overriding the task type to a specific custom legend on the Advanced Import form
4. Overriding the task type after its been imported onto a slide using the **Override Selected Shape Task Types** feature

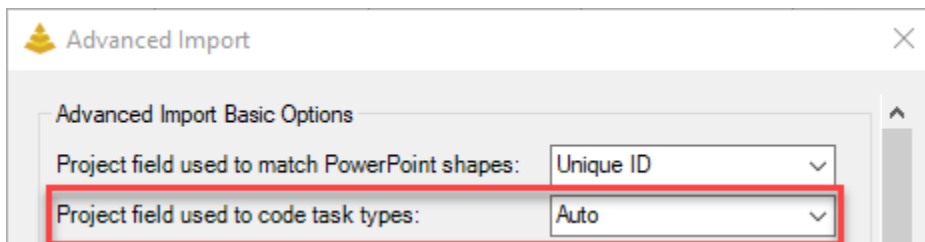
This document will cover how to use these four options.

Changing the Project Field to Code Task Types on the Advanced Import Form

The Advanced Import Form allows you to customize various options about how selected items from Microsoft Project will be imported before the import occurs.



The second option on the *Advanced Import* form is called *Project Field used to code task types*.

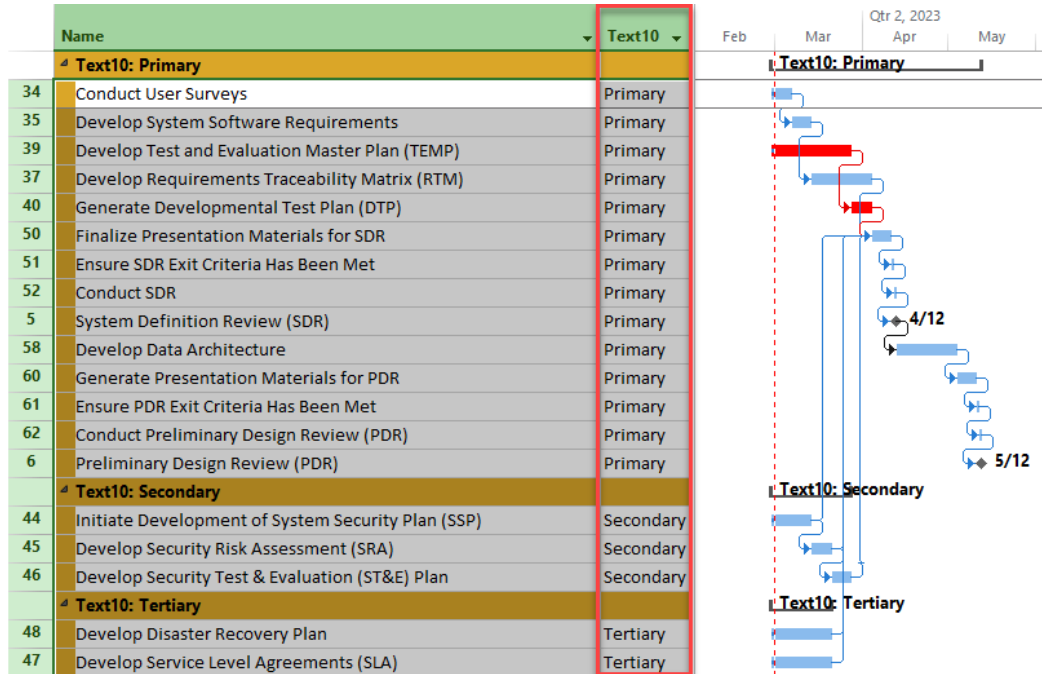


The second option on the Advanced Import form is called the *Project Field used to code task types*. When this option is set to 'Auto,' imported shapes will automatically be assigned the task type that corresponds to their classification in Microsoft Project (Task, Summary, or Milestone).

If this value is changed to a specific Microsoft Project field, Presentation Pro will code the task types of imported items based on the value of that field. For example, if the *Project Field used to code task types* is set to 'Text10' and an item being imported has the value 'Primary' in its Text10 field, Presentation Pro will code that shape as 'Primary' instead of Task, Summary, or Milestone.

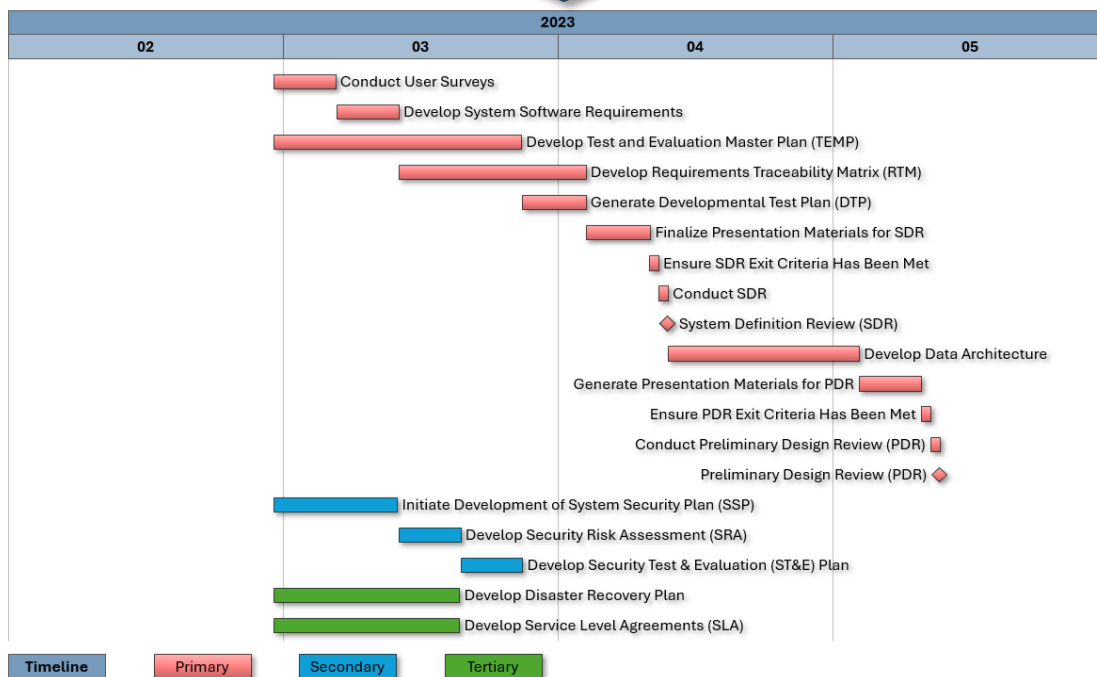
If a matching legend for the task type being imported already exists, Presentation Pro will use the style of that legend. If the legend is already on the slide when the item is imported, Presentation Pro will format the shape exactly as its legend appears on the slide. If the legend is not present on the slide during the import, Presentation Pro will format the shape according to the Default legend style of its corresponding type.

If no matching legend for the task type being imported exists, Presentation Pro will automatically create a legend for the new task type and assign it a random color. Like any other legend, this can be customized on the slide, and content can be matched to its corresponding legends using the *Match Legend Styles* feature. However, SSI recommends creating legends beforehand to better control the style.



The 'Advanced Import' dialog box is shown. It has a title bar with the Structured Solutions logo and a close button. The main content area is titled 'Advanced Import Basic Options'. It contains two dropdown menus:

- Project field used to match PowerPoint shapes: Unique ID
- Project field used to code task types: Text10

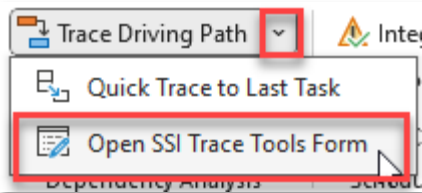
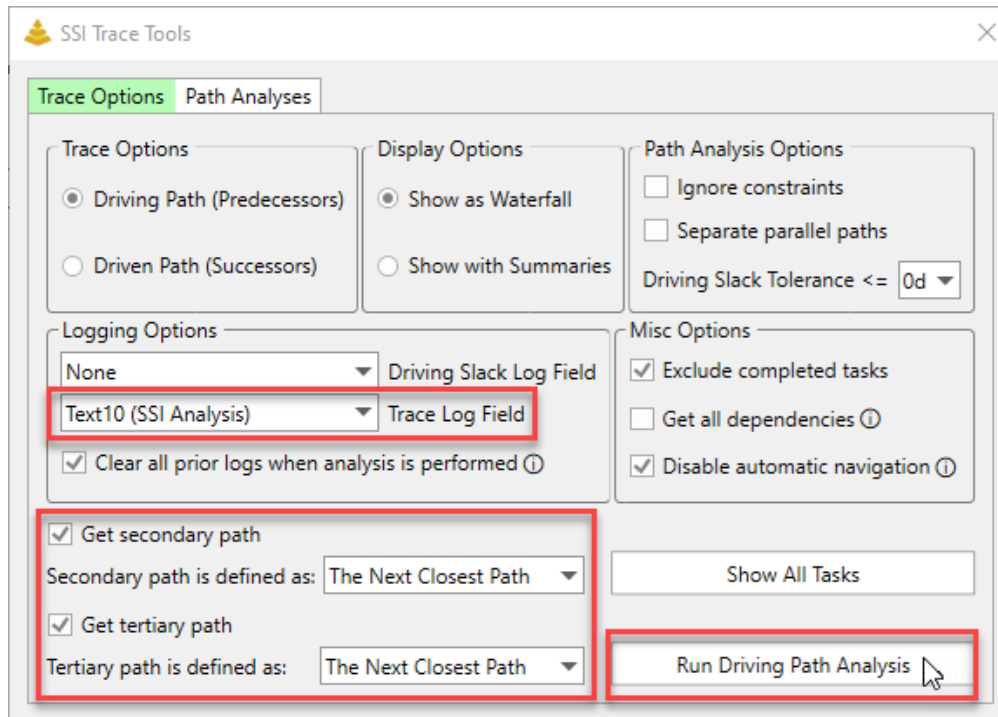


Class Exercise – Changing the Project Field to Code Task Types on the Advanced Import Form

Start of Practice Exercise

1. Open the [SSi Example Project file](#) in Microsoft Project.
2. Insert the Text10 column in the Gantt Chart
3. Use the SSI Trace Tools to get a Primary, Secondary and Tertiary Path to **Preliminary Design Review** (Unique ID 6). Make sure the **Trace Log Field** is set to 'Text10'

Unique ID	Name	Mar	Qtr 2, 2023	Apr	May
4	Solution Engineering Review (SER)	2/27			
5	System Definition Review (SDR)		4/12		
6	Preliminary Design Review (PDR)				
7	Critical Design Review (CDR)				

SSI Trace Tools

Trace Options Path Analyses

Trace Options

- ☒ Driving Path (Predecessors)
- ☐ Driven Path (Successors)

Display Options

- ☒ Show as Waterfall
- ☐ Show with Summaries

Path Analysis Options

- ☐ Ignore constraints
- ☐ Separate parallel paths
- Driving Slack Tolerance <= 0d

Logging Options

- None
- Text10 (SSI Analysis) **Trace Log Field**
- ☒ Clear all prior logs when analysis is performed

Misc Options

- ☒ Exclude completed tasks
- ☐ Get all dependencies
- ☒ Disable automatic navigation

Get secondary path

Secondary path is defined as: The Next Closest Path

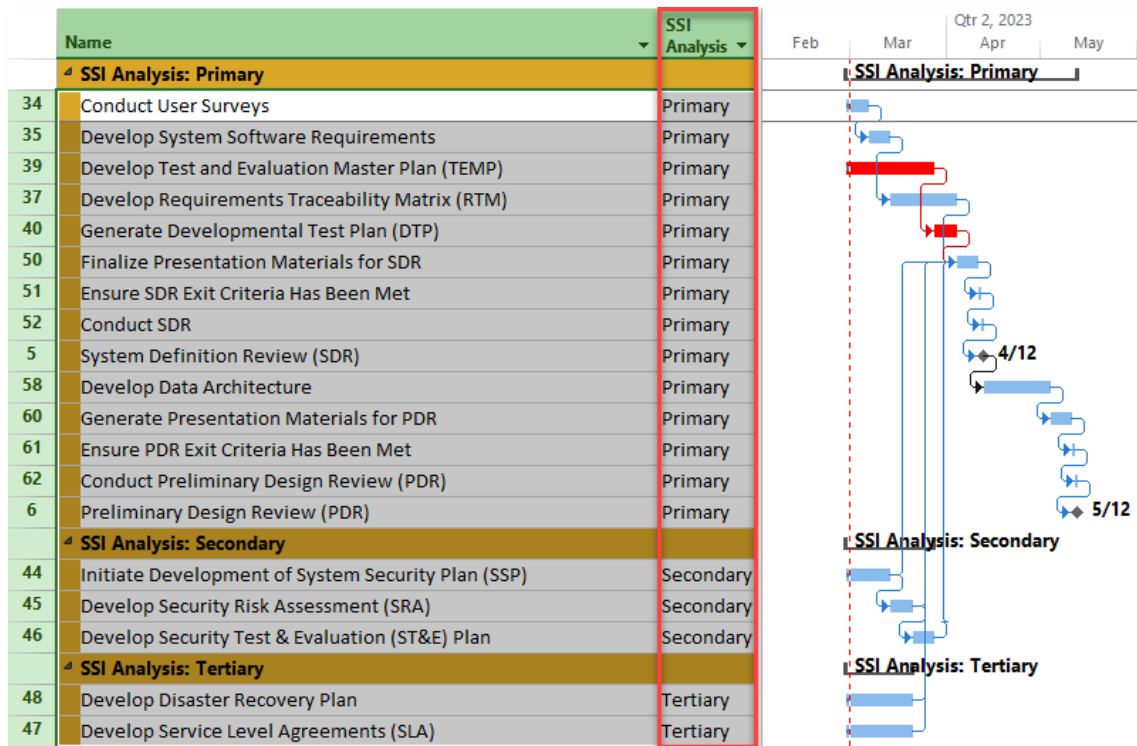
Get tertiary path

Tertiary path is defined as: The Next Closest Path

Show All Tasks

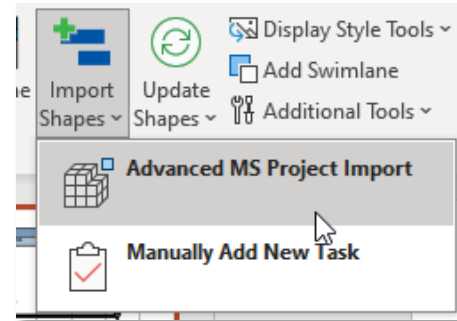
Run Driving Path Analysis

4. Select the tasks displayed in Microsoft Project. Notice the values in the Text10 field:

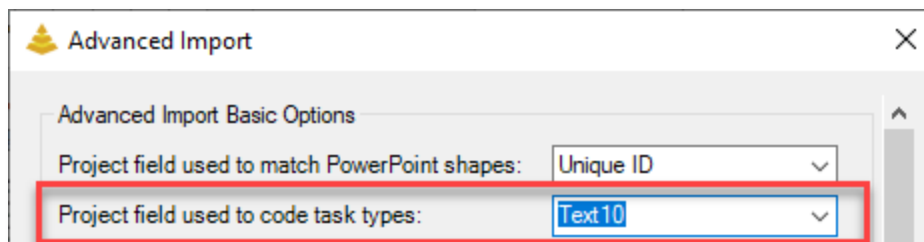


5. Navigate back to PowerPoint and open a blank slide.

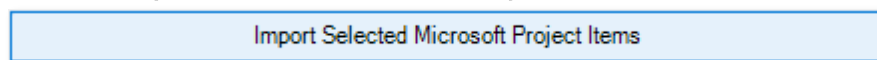
6. Open the **Advanced Import form** by clicking the *lower-half* of the **Update Shapes** button and selecting **Advanced MS Project Import** from the menu.



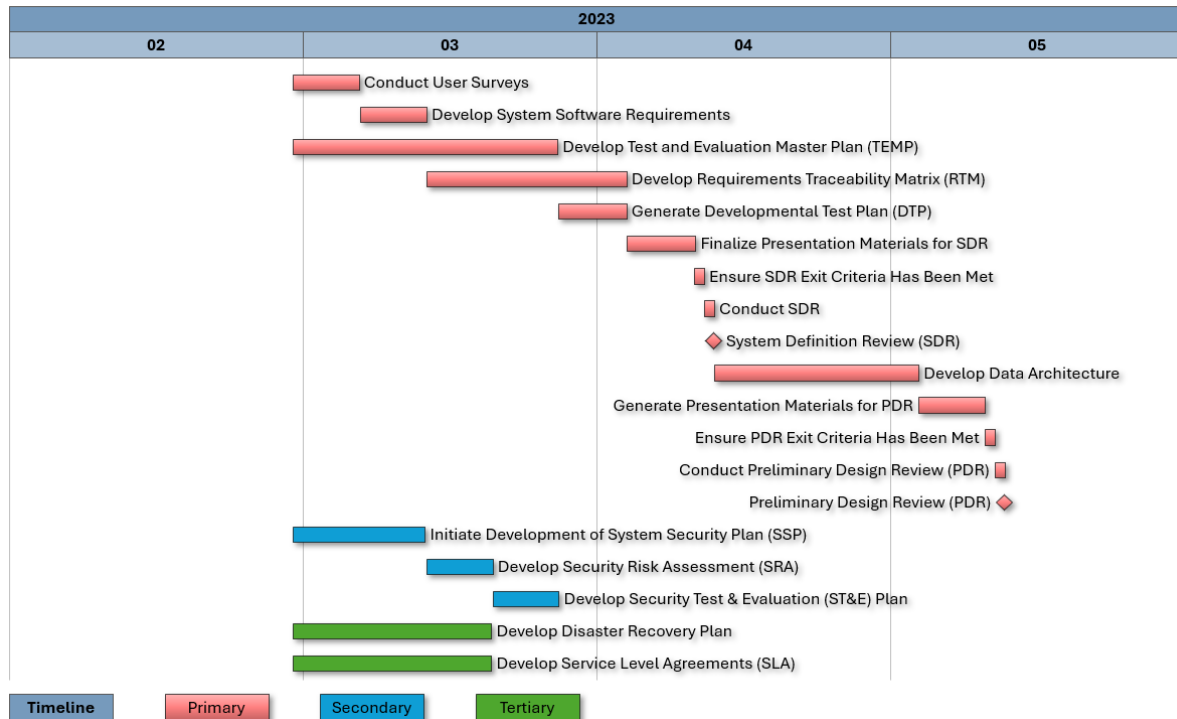
7. Set the **Project Field used to code task types** as 'Text10':



8. Click the **Import Selected Microsoft Project Items** at the bottom of the **Advanced Import Form**.



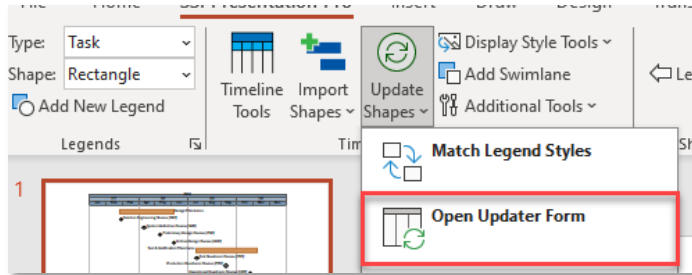
9. Observe the chart created follows the legend styles created in the previous exercise:

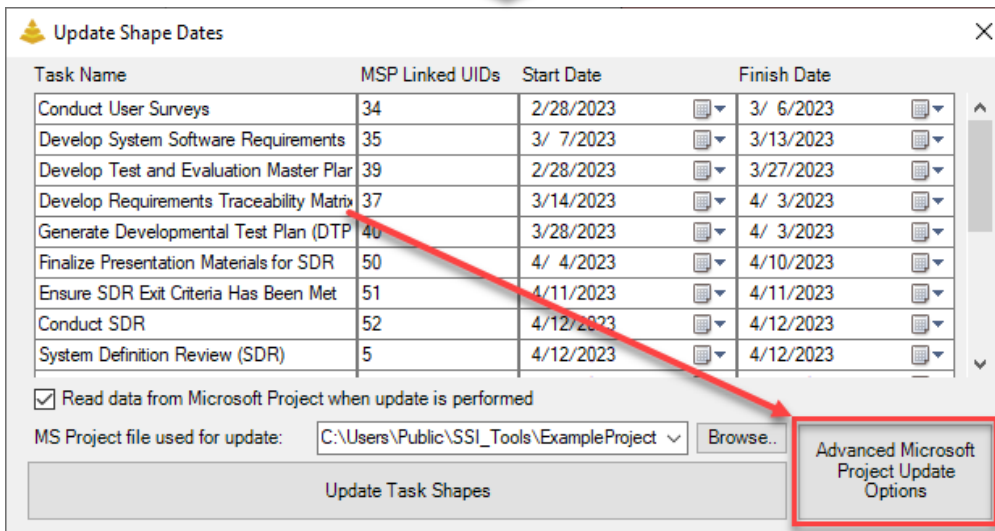


End of Practice Exercise

Using Updater Form to Adjust Task Types

Task types can be changed to correspond to a values from a field in Microsoft Project after they have already been added to a slide 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

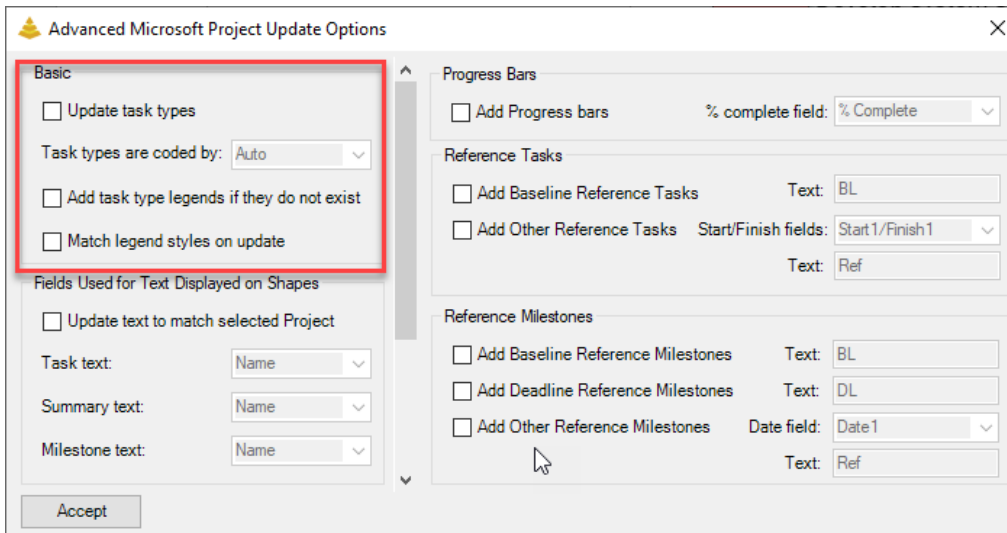
☒ Read data from Microsoft Project when update is performed

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

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

Checking the **Update task types** option in the upper left section of the **Advanced Update Options form** tells Presentation Pro to update the task types of the content on the current slide based on the value in the specified Microsoft Project field.

☒ Update task types

Use the **Task types are coded by** drop-down menu to select the Microsoft Project field that should be used to determine the task types.

Task types are coded by: Text10

Check the **Add task type legends if they do not exist** option to automatically add legends for any task types that do not already have legends on the slide.

☒ Add task type legends if they do not exist

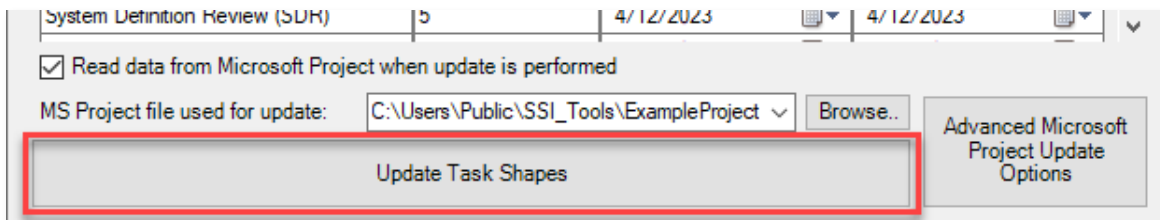
Check the **Match legend styles on update** option to ensure that the styles of the updated task types are formatted to their corresponding legends styles after the update process is completed.

☒ Match legend styles on update

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

Accept

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.



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

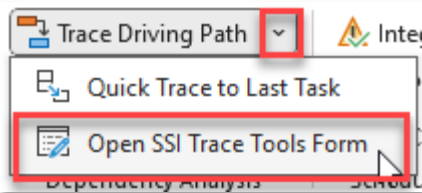
Advanced Microsoft Project Update Options

Class Exercise – Using the Updater Form to Change Task Types

Start of Practice Exercise

1. Open the [SSi Example Project file](#) in Microsoft Project.
2. Insert the Text10 column in the Gantt Chart
3. Use the SSI Trace Tools to get a Primary, Secondary and Tertiary Path to **Preliminary Design Review** (Unique ID 6). Make sure the **Trace Log Field** is set to 'Text10'

Unique ID	Name	Mar	Qtr 2, 2023	Apr	May
4	Solution Engineering Review (SER)	2/27			
5	System Definition Review (SDR)		4/12		
6	Preliminary Design Review (PDR)				
7	Critical Design Review (CDR)				



SSI Trace Tools

Trace Options | Path Analyses

Trace Options

☒ Driving Path (Predecessors)

☐ Driven Path (Successors)

Display Options

☒ Show as Waterfall

☐ Show with Summaries

Path Analysis Options

☐ Ignore constraints

☐ Separate parallel paths

Driving Slack Tolerance <= 0d

Logging Options

None

Text10 (SSI Analysis)

Driving Slack Log Field

Trace Log Field

☒ Clear all prior logs when analysis is performed

Misc Options

☒ Exclude completed tasks

☐ Get all dependencies

☒ Disable automatic navigation

☒ Get secondary path

Secondary path is defined as: The Next Closest Path

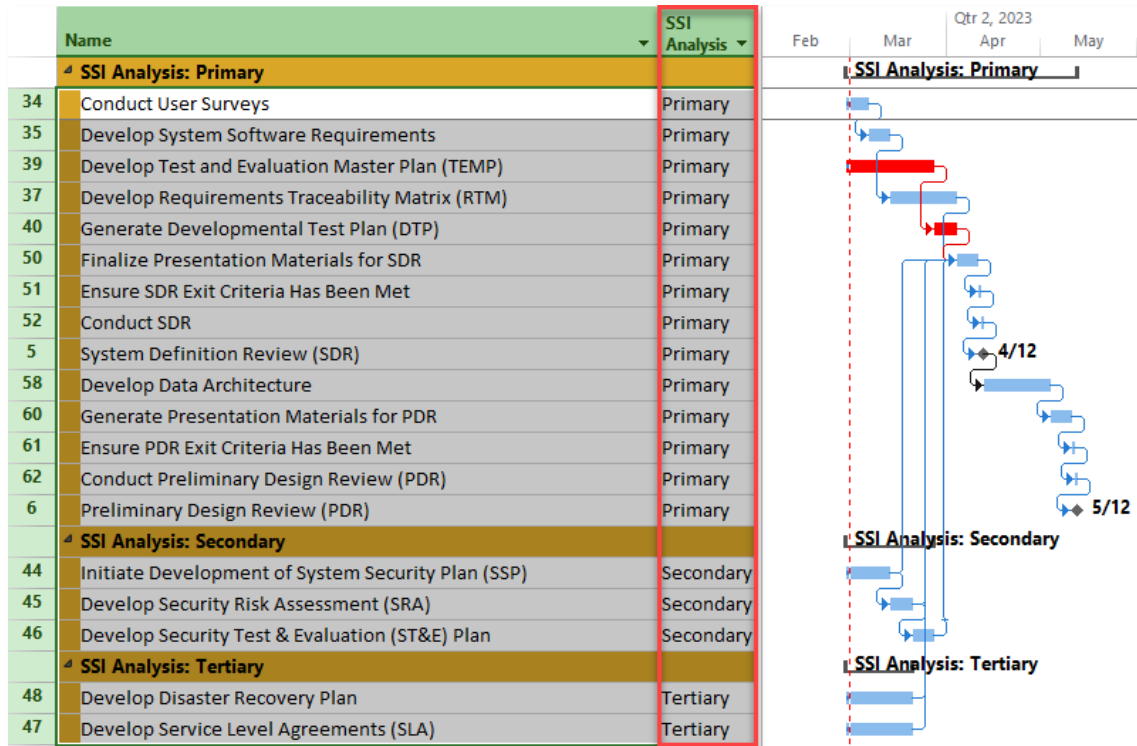
☒ Get tertiary path

Tertiary path is defined as: The Next Closest Path

Show All Tasks

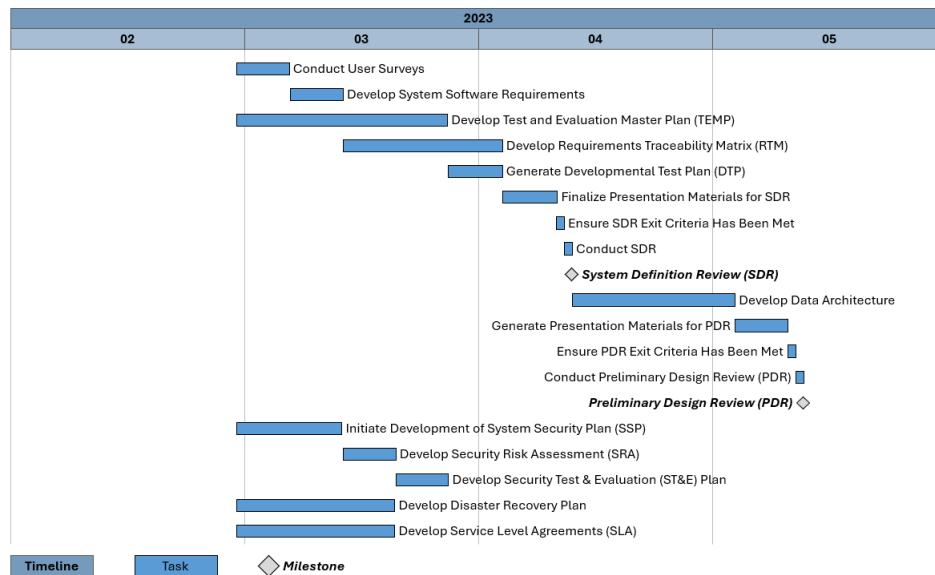
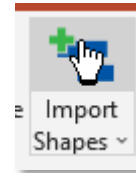
Run Driving Path Analysis

4. Select the tasks displayed in Microsoft Project. Notice the values in the Text10 field:

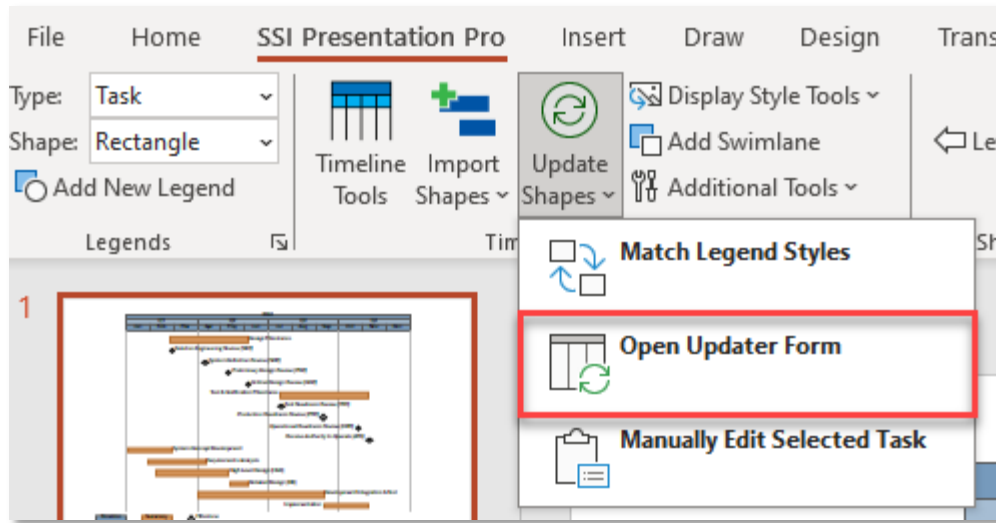


5. Navigate back to PowerPoint and open a blank slide.

6. Click the *top-half* of the **Import Shapes** button to import the selected Microsoft Project items normally



7. Open the **Updater Form** by clicking the **lower half** of the **Update Shapes** button and choosing the **Open Updater Form** option:



8. On the **Updater Form**, click the **Advanced Microsoft Project Update Options** button to open the **Advanced Update Options Form**.

Advanced Microsoft
Project Update
Options

9. Set the options in the **Basic group** of the **Advanced Update Options Form** to match the image to the right →

Basic

☒ Update task types

Task types are coded by: Text10

☒ Add task type legends if they do not exist

☒ Match legend styles on update

10. Click the **Accept** button on the bottom left corner of the **Advanced Update Options Form**.

Accept

11. Back on the **Updater Form**, click **Update Task Shapes**

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

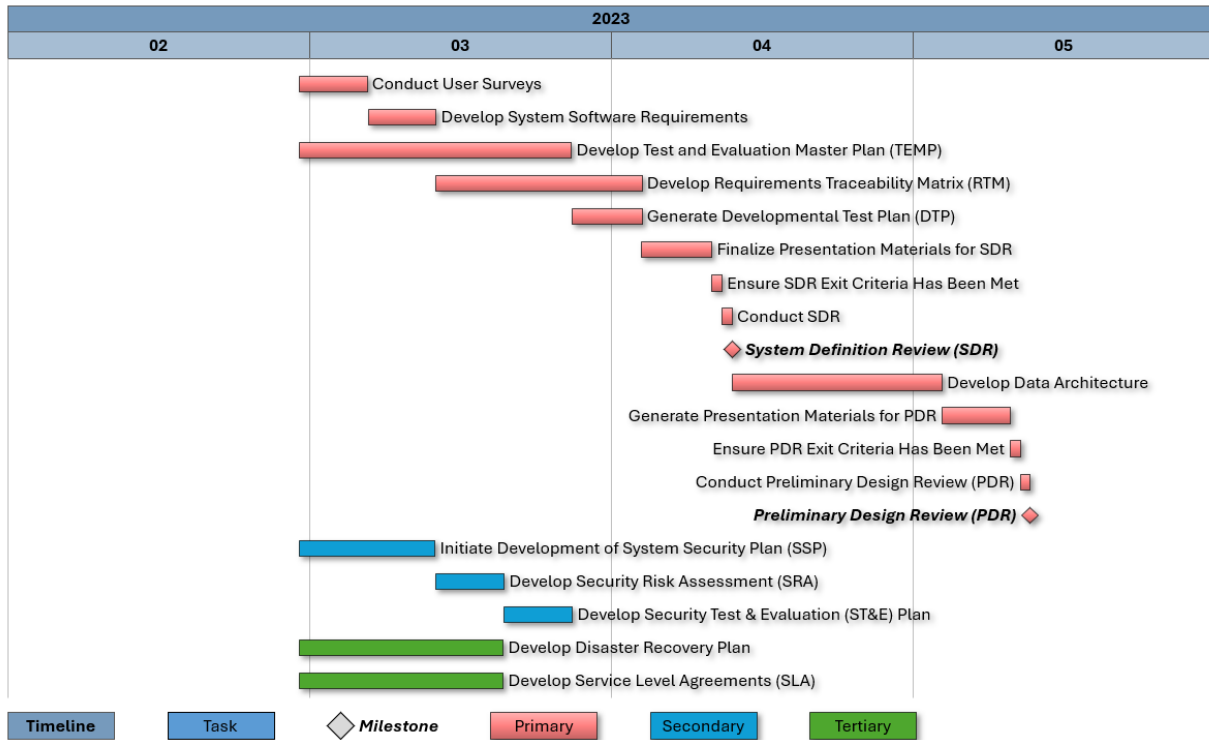
MS Project file used for update: C:\Users\Public\SSi_Tools\ExampleProject

Browse..

Update Task Shapes

Advanced Microsoft
Project Update
Options

12. Observe how the chart has changed:



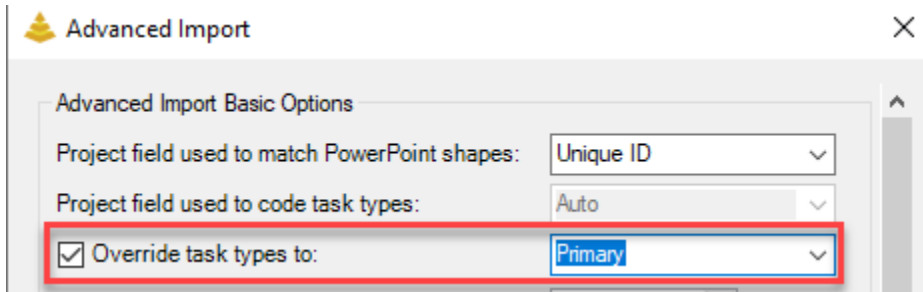
End of Practice Exercise

Overriding Task Types

There are two ways to have Presentation Pro code a shape's task type to a specific value *without* needing to code it in a Microsoft Project field.

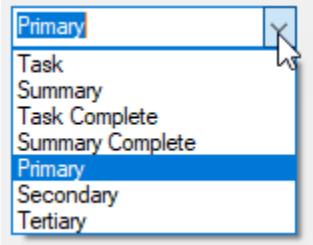
Using the Updater Form

The first method to have Presentation Pro code a shape's task type to a specific value *without* needing to code it in a Microsoft Project field is to check the ***Override task types to*** option in the ***Advanced Import*** form



The screenshot shows the 'Advanced Import' dialog box. Under the 'Advanced Import Basic Options' section, there are three settings: 'Project field used to match PowerPoint shapes:' set to 'Unique ID', 'Project field used to code task types:' set to 'Auto', and 'Override task types to:' which is checked and set to 'Primary'. The 'Override task types to:' section is highlighted with a red rectangle.

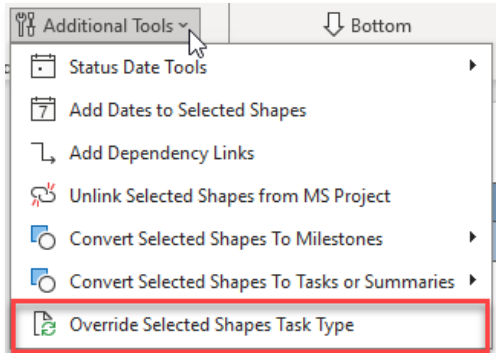
Checking this option will tell Presentation Pro to code the task type of all items imported to the specified value. The values available in the drop-down menu will be populated with all legends (except Milestones)



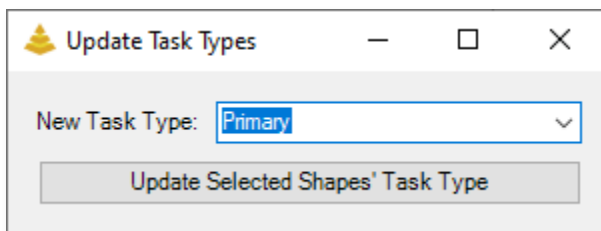
This means you must create the legend type first using the ***Legend Default Options*** form if you would like to be able to override items to that type.

Using the Override Selected Task Types Tool

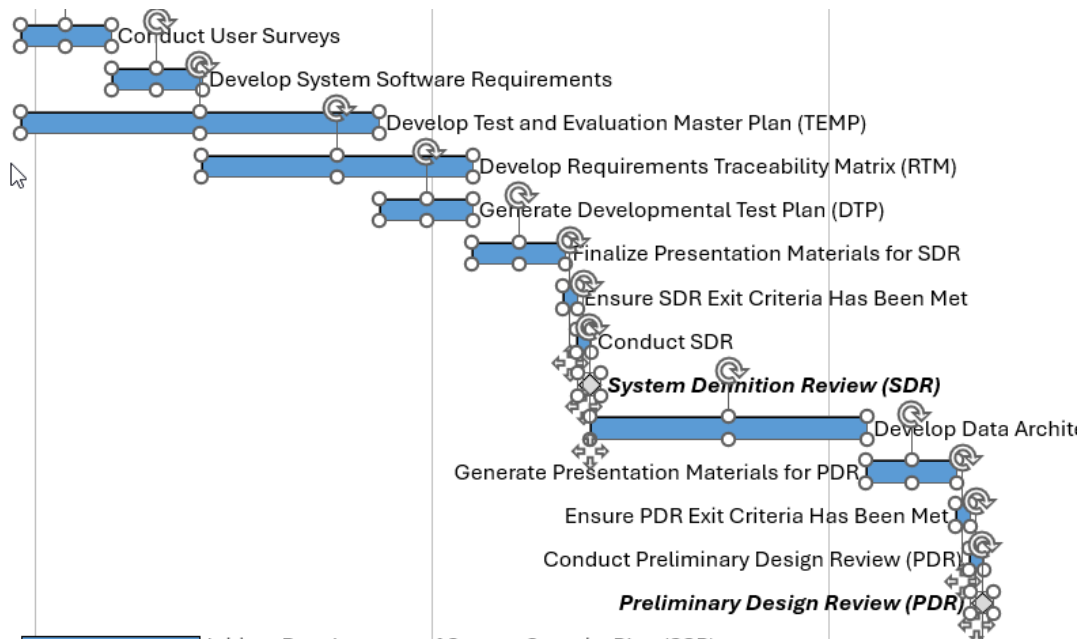
The second method to have Presentation Pro code a shape's task type to a specific value *without* needing to code it in a Microsoft Project field is to use the ***Override Selected Task Types Tool***. This tool can be accessed from the ***Additional Tools*** menu in the ***SSI Presentation Pro Ribbon***.



Clicking this button will open a form that will allow you to set the task type of *selected* shapes to a specific value:



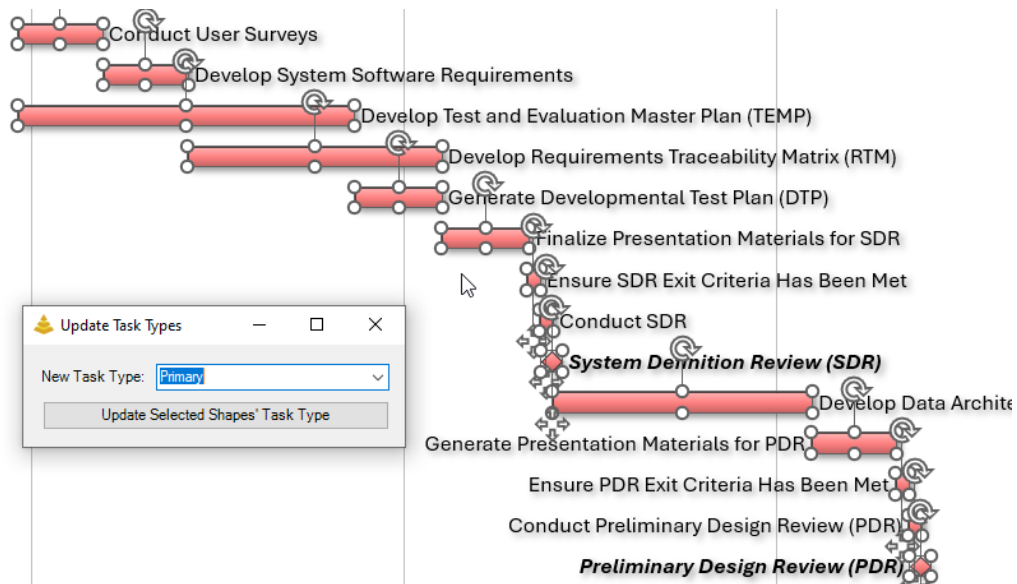
Click the ***Update Selected Shapes' Task Type*** button for the change to take effect on the slide. Remember, this will only change the shapes *currently selected*. See the example on the following page:




Update Task Types
—
□
×

New Task Type: Primary

Update Selected Shapes' Task Type



Hands on Exercise – Converting Shapes to a Custom Type

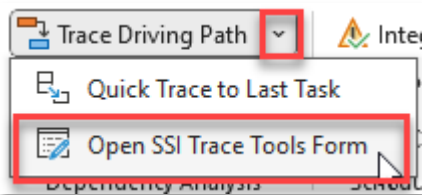
Start of Practice Exercise

1. Open the [SSI Example Project file](#) in Microsoft Project if it is not already open.



2. Use the SSI Trace Tools to get a Primary, Secondary and Tertiary Path to **Preliminary Design Review** (Unique ID 6).

Unique ID	Name	Mar	Qtr 2, 2023	Apr	May
4	Solution Engineering Review (SER)	2/27			
5	System Definition Review (SDR)			4/12	
6	Preliminary Design Review (PDR)				
7	Critical Design Review (CDR)				5/12




SSI Trace Tools

Trace Options
Path Analyses

Trace Options

- ☒ Driving Path (Predecessors)
- ☐ Driven Path (Successors)

Display Options

- ☒ Show as Waterfall
- ☐ Show with Summaries

Path Analysis Options

- ☐ Ignore constraints
- ☐ Separate parallel paths
- Driving Slack Tolerance <= 0d

Logging Options

- None
- ☒ Text10 (SSI Analysis)
- ☒ Clear all prior logs when analysis is performed

Misc Options

- ☒ Exclude completed tasks
- ☐ Get all dependencies
- ☒ Disable automatic navigation

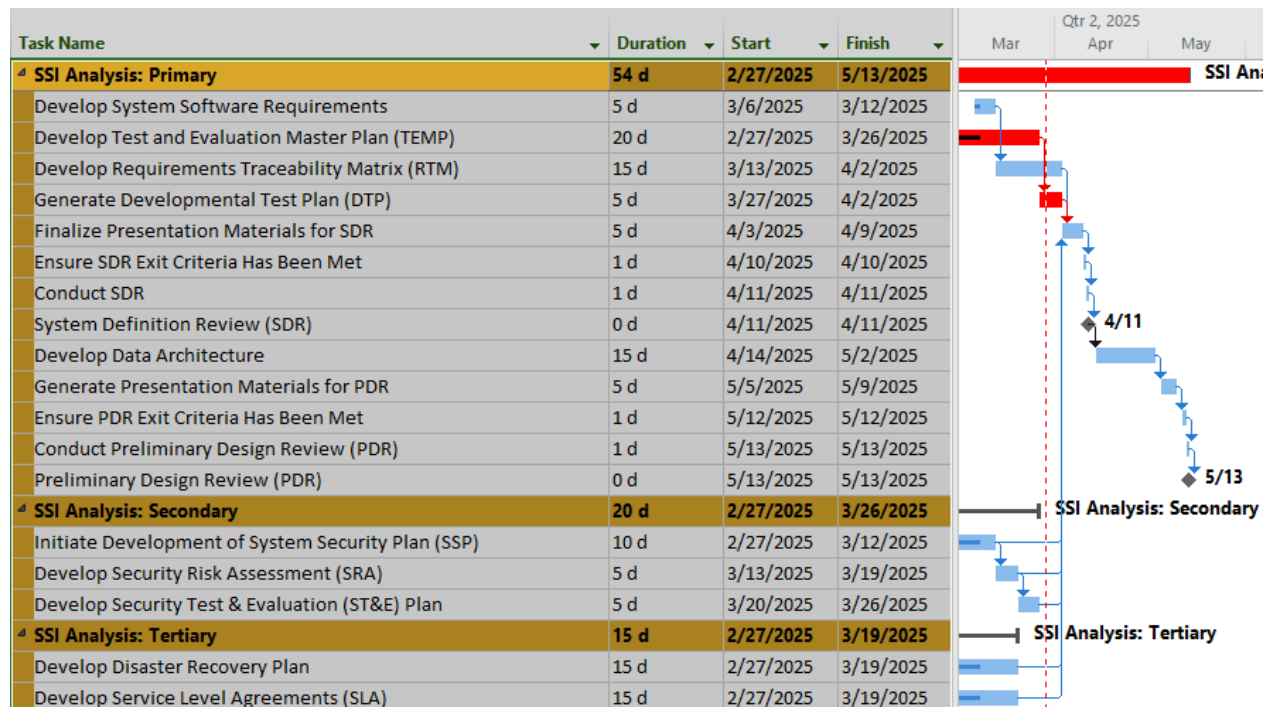
☒ Get secondary path
Secondary path is defined as: The Next Closest Path

☒ Get tertiary path
Tertiary path is defined as: The Next Closest Path

Show All Tasks

Run Driving Path Analysis

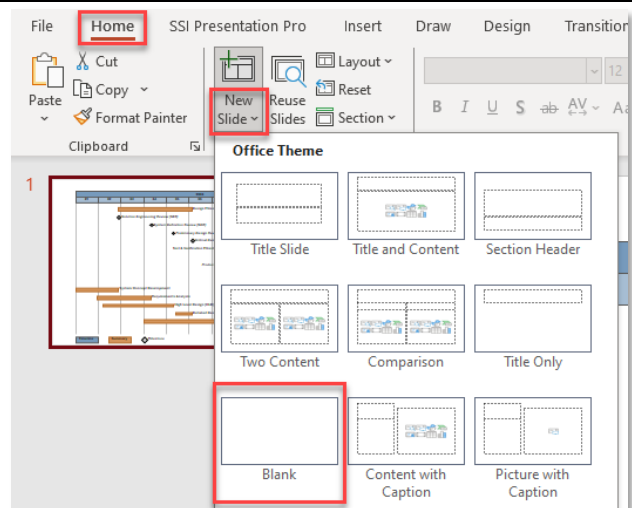
3. Select the tasks displayed in Microsoft Project.:



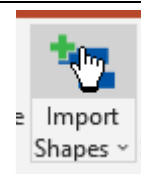
4. Navigate back to PowerPoint.



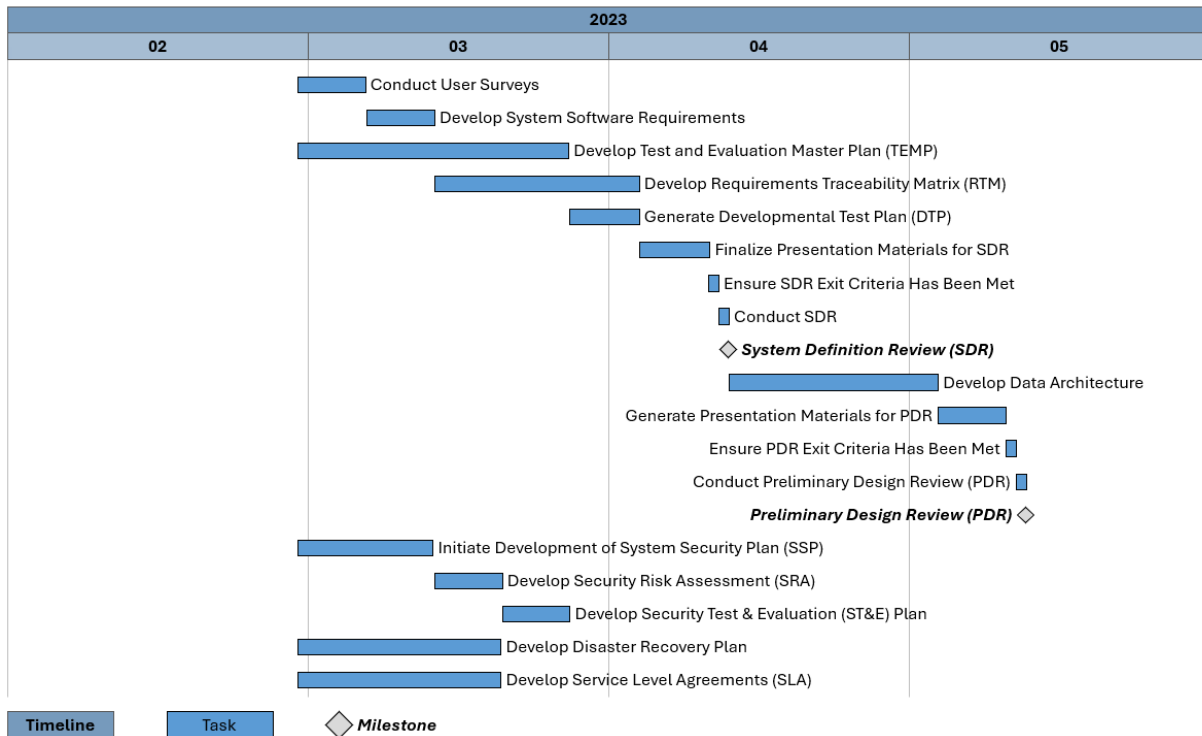
5. Add a new blank slide to the presentation you are in.



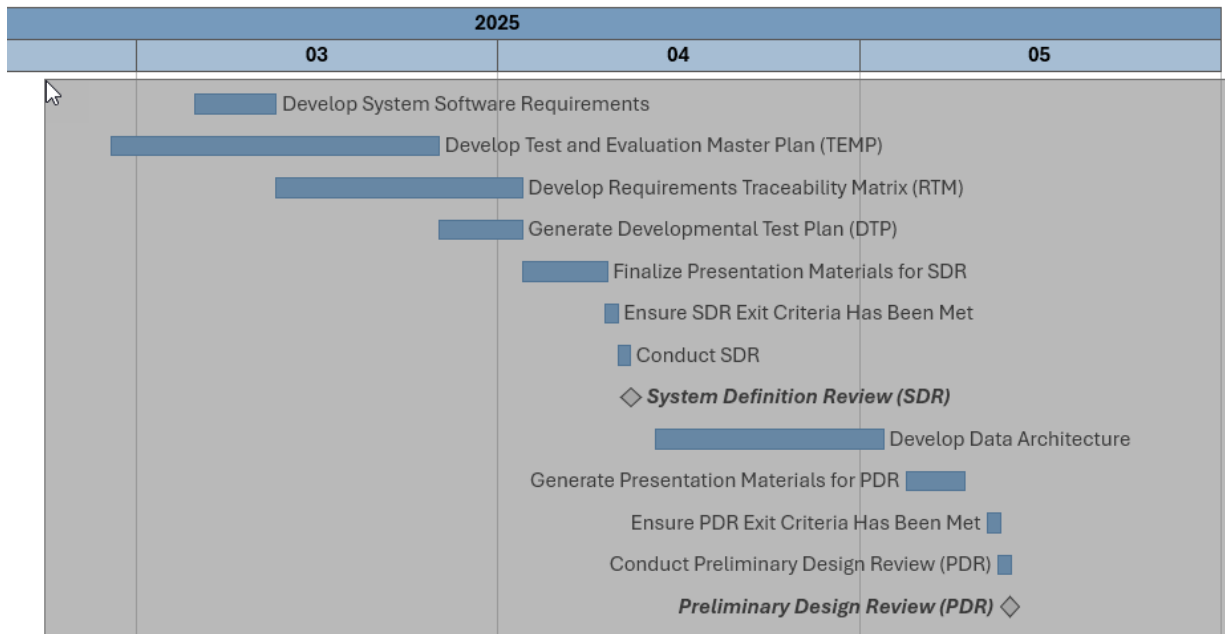
6. Click the *top-half* of the **Import Shapes** button to import the selected Microsoft Project items normally

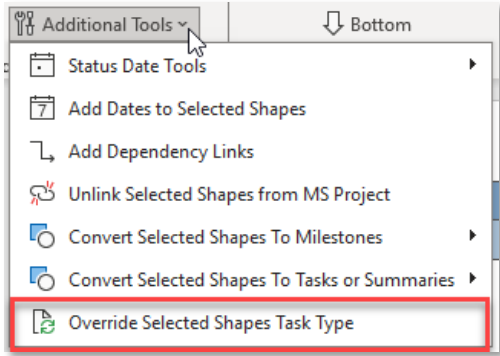
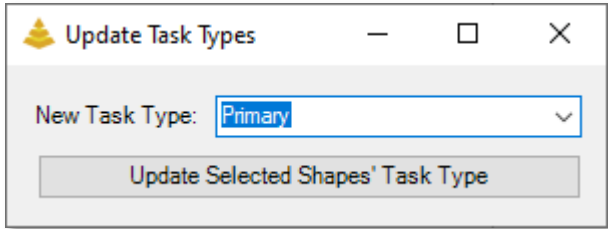
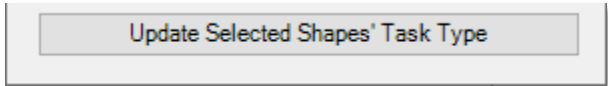
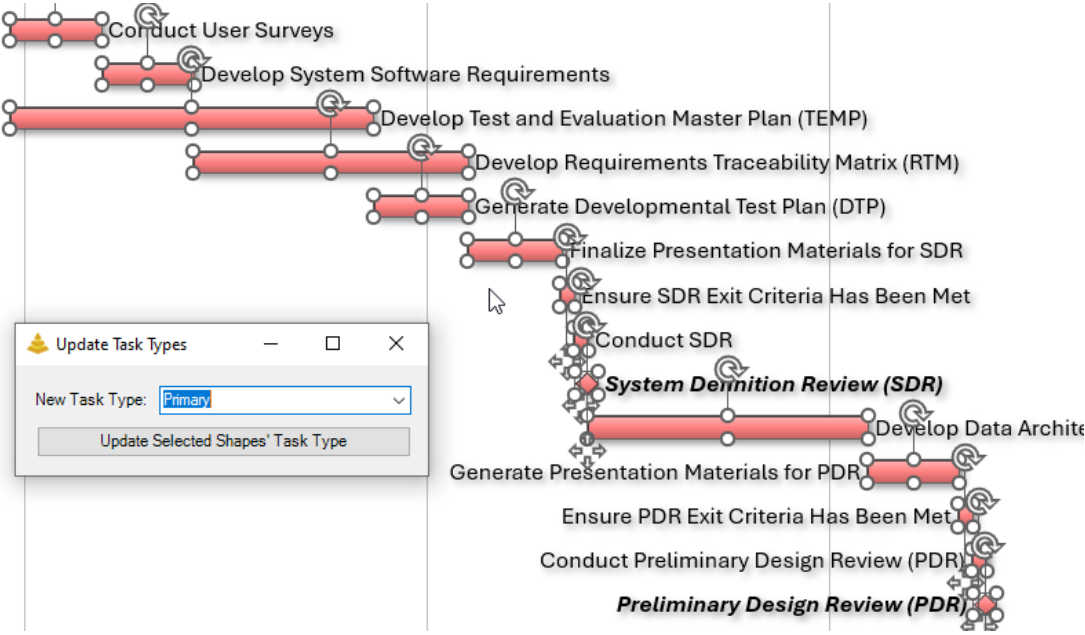


7. Observe the chart created:



8. Select all the activity shapes up to the milestone *Preliminary Design Review (PDR)*.



9. With those shapes selected, click the Additional Tools button in the Timelines and Tasks group of the Presentation Pro ribbon. From the drop down menu, click the Override Selected Shapes Task Type button.	
10. On the dialog that opens, set the New Task Type selection to Primary. If you do not see Primary in the drop-down list, follow the steps on page 25 of this document to create it.	
11. Click the Update Selected Shapes' Task Type button.	
12. Observe the selected activity shapes: 	
13. Repeat this process to change the activity type of the other shapes on the chart to Secondary and Tertiary.	
End of Practice Exercise	