Milestones PROFESSIONAL® TUTORIALS

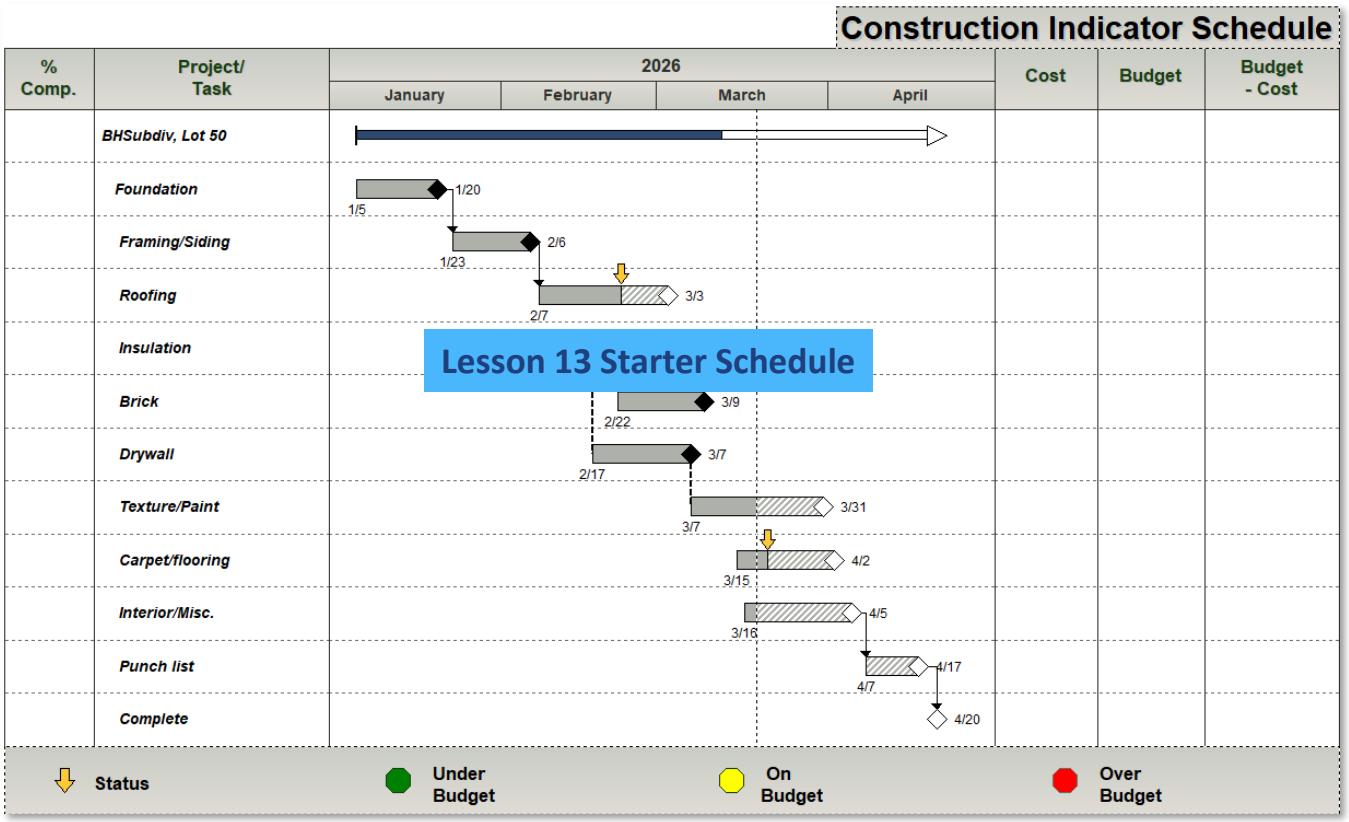
Lesson 13
Calculation/Indicator and % Complete Columns

In this lesson you will learn how to:

- Create a Percent Complete SmartColumn with a percent complete pie.
- Change the percent complete of a task.
- Create two Values SmartColumns (columns which contain values.)
- Enter values in to the Values Smart Columns.
- Create a Calculation/Indicator SmartColumn and set conditions for symbols to appear.

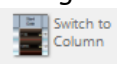
Open the schedule for this lesson

1. On the toolbar, choose *File*.
2. In the Files and Templates: Open and Save Options section select *Open Samples or Lesson*. The Open a Sample Chart dialog displays.
3. Under Select a Folder below to Open, select *Lessons*. Then, pick *Lesson 13 Starter Schedule.mlq*.
4. Save the schedule to an accessible folder on your computer. Choose the *File* tab. In the Files and Templates: Open and Save Options section, choose *Save As*…. In the menu that displays choose *Chart*. Name, then save the schedule.



Create a Percent Complete SmartColumn with a percent complete pie

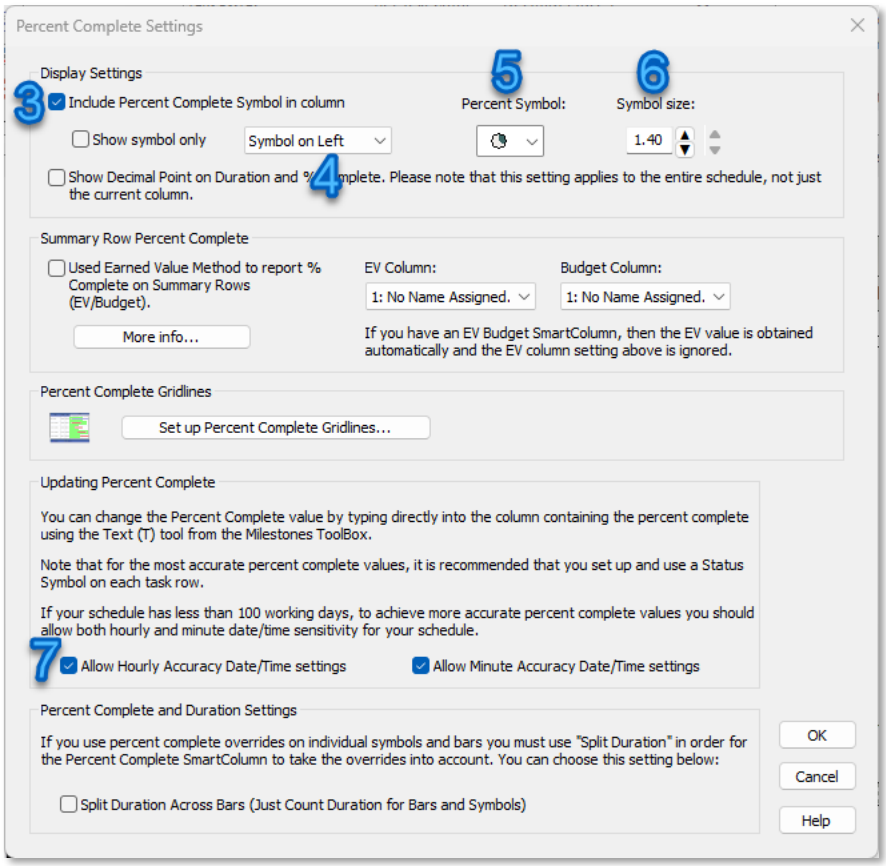
Percent complete is used for showing and maintaining a project's progress. By default, this column will show progress based on the current date (here, the vertical dotted line). To establish progress differently, a status symbol (here, the gold arrow symbol) can be used to manipulate the progress of project tasks.

1. Using ↖(*the toolbox arrow tool*), click the *% Comp. column heading*. The toolbar will change to the Selection tab with Current Object: Column Heading. Choose 

Switch to Column.
2. In the Column Type and Format section click the *down arrow* in the field showing (none). Scroll and choose *Percent Complete*. The Percent Complete Settings dialog box displays.



3. For Display Settings ☑ *Include Percent Complete Symbol in column*.
4. Choose *Symbol on Left*.
5. Under *Percent Symbol* note the percent complete symbol is chosen.
6. Under *Symbol Size* scroll to *1.40*.



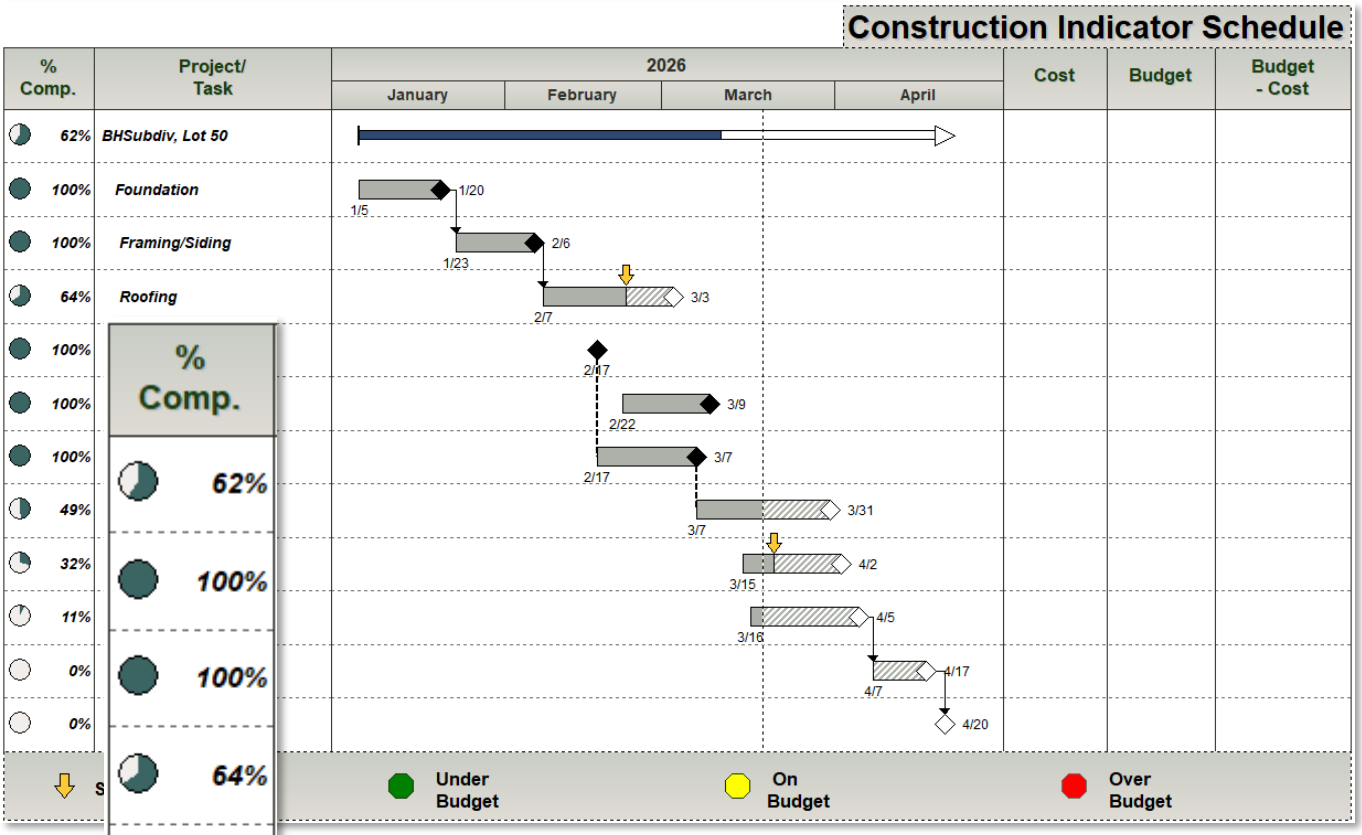
> The percent complete symbol is shape #97 in toolbox. For this schedule it is already set-up. If a percent symbol is not set-up select any symbol not being used on the schedule and it will become symbol shape #97.

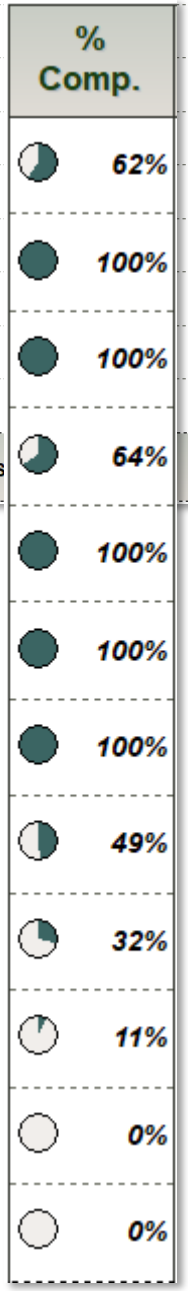
7. Under Updating Percent Complete ☑ *Allow Hourly Accuracy Date/Time settings* and *Allow Minute Accuracy Date/Time settings*.
8. Click *OK* to return to the schedule. The schedule will now have a % value and a % complete symbol for each task in the % Comp. column. See Result on the next page.

> For the most accurate % complete, Allow Hourly Accuracy Date/Time settings and Allow Minute Accuracy Date/Time settings should be selected.

Create a Percent Complete SmartColumn with a percent complete pie (continued)

Result

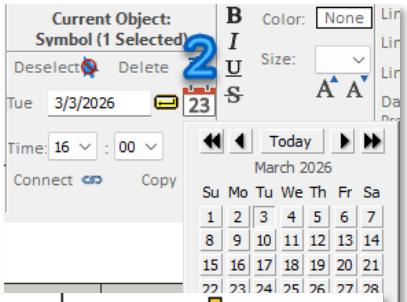


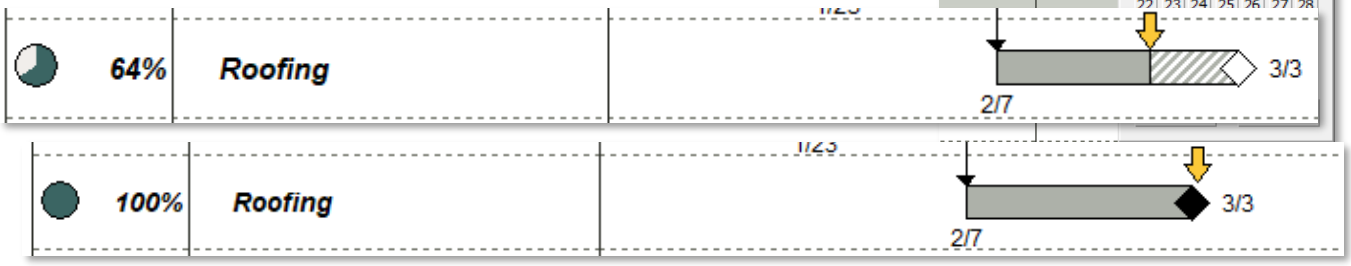


Change the percent complete of a task.

Moving a status symbol

1. Click the ↖ (*the toolbox arrow tool.*)
2. On the *Roofing* task, click on the *status symbol (gold arrow)*. The toolbar is now active for that symbol. Using the calendar icon, change the date to *3/03/2026*.
   Notice the change in the bar shading. Also, the % Comp. column value is now 100% and the percent complete symbol has changed .





Changing the % value in the column

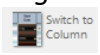
3. Click T (*the toolbox Text tool*.)
4. Move the cursor to *Carpet/flooring task*. In the *Percent Complete* cell back space through the 32% text.
5. Enter *75* (for 75%). Then press *Enter* on the keyboard. Notice that the status symbol moved to reflect the new percent.

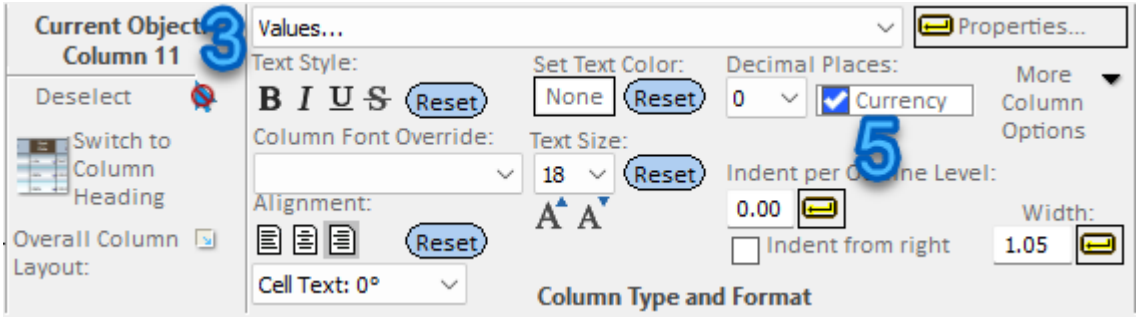


Create Two Values SmartColumns

The Cost and Budget columns will be changed to Values SmartColumns.

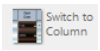
Cost Column

1. Click ↖(*the toolbox arrow tool.*)
2. Click the *Cost column heading*. The toolbar will change to the Selection tab with Current Object: Column Heading. Choose  *Switch to Column*.



3. In the Column Type and Format section click the  *down arrow* in the field showing (none). Scroll and choose *Values*. The Indicators for Values Column dialog box displays.
4. Click *OK* because the default for this column only displays values. This is the column look wanted for this schedule.
5. Also in the toolbar, in the Column Type and Format section, ☑ *Currency* to have a dollar sign display on the column values.

Budget Column

1. Click the *Budget column heading*. The toolbar will change to the Selection tab Current Object: Column Heading. Choose  *Switch to Column*.
2. In the Column Type and Format section click the  *down arrow* in the field showing (none). Scroll and choose *Values*. The Indicators for Values Column dialog box appears.
3. Click *OK* because the default for this column only displays values. This is the column look wanted for this schedule.
4. Also in the toolbar, in the Column Type and Format section ☑ *Currency* to have a dollar sign display on the column values.

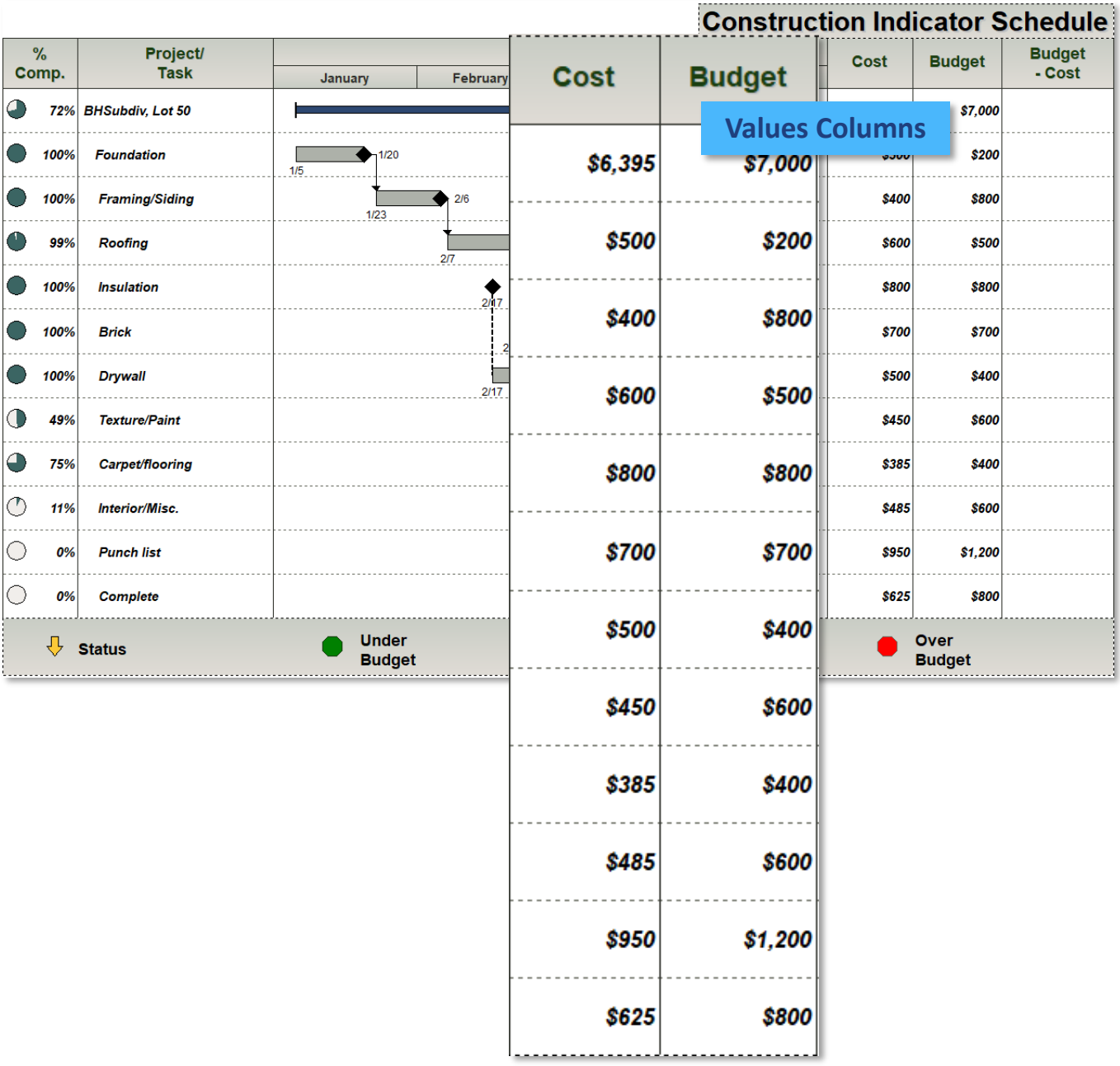
The columns now display $0. The values will be entered next. Go to the next page.

Enter values into the Values SmartColumns

1. Click the (T) *Text* tool in the toolbox.
2. Click once in the cell of the Cost column for the Foundation task row and enter *500*.

   Cost and Budget values for the **BHSubdiv, Lot 50** task row are automatically totaled because the schedule is outlined. This setting is under **Layout** menu. In the **Other** section (choose **Summary Bar Settings…**).

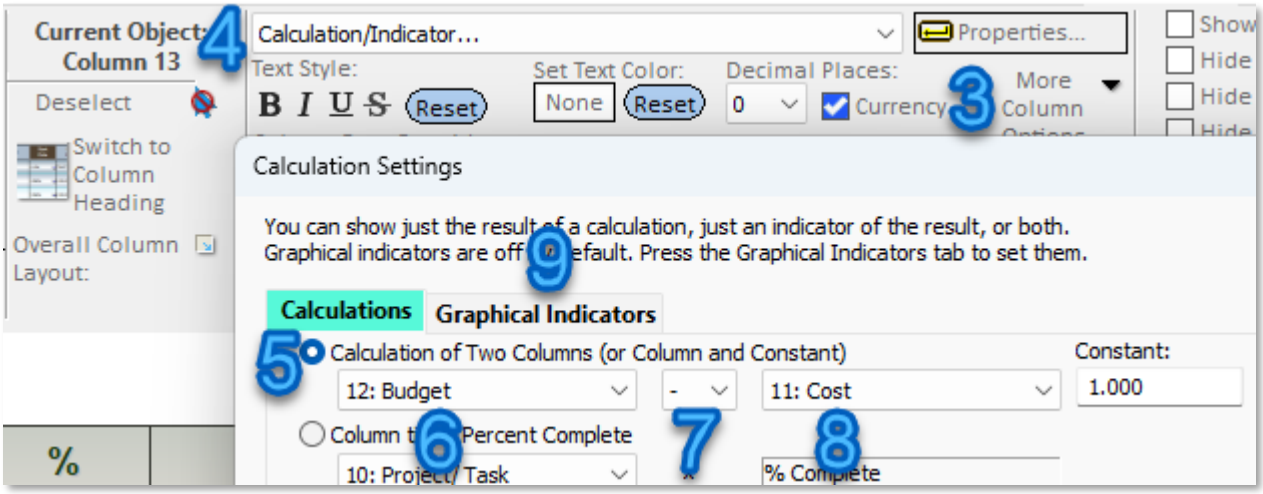
3. Click *Enter* or *the down arrow key* on the keyboard, to get to the next task row's Cost cell and enter the following values for all tasks. Framing/Siding *400*, Roofing *600*, Insulation *800*, Brick *700*, Drywall *500*, Texture/Paint *450*, Carpeting/Flooring *385*, Interior/Misc. *485*, Punch List *950*, Complete *625* (Do not press enter or the down arrow key simply click out of the schedule. This prevents adding a second page)
4. Continue entering the following values for Budget. Foundation *200*, Framing/Siding *800*, Roofing *500*, Insulation *800*, Brick *700*, Drywall *400*, Texture/Paint *600*, Carpeting/Flooring *400*, Interior/Misc. *600*, Punch List *1200*, Complete *800* (Do not press enter or the down arrow key simply click out of the schedule. This prevents adding a second page)



Create a Calculation/Indicator SmartColumn and set conditions for symbols to appear

Now, define the Budget-(minus) Cost column as a Calculation/Indicator SmartColumn which subtracts the Cost column values from the Budget column values. Then display symbols based on those values.

1. Use ↖ (*the toolbox arrow tool in the toolbox*.)
2. Click the *Budget - Cost* column heading. The toolbar will change to Current Object:Column Heading. Choose *Switch to Column*.



3. In the Column Type and Format section ☑ *Currency*.
4. In the Column Type and Format section click the (none) *down arrow* in the field showing (none). Scroll and choose *Calculation/Indicator*. The Calculation Settings dialog box displays.

Calculations tab

5. On the Calculation tab choose *Calculation of Two Columns*.
6. Under Calculation of Two Columns in the first box click the down arrow scroll and choose: *12: Budget*.
7. In the second box click the down arrow, scroll and choose the *(-) minus sign*.
8. In the third box click the down arrow, scroll and choose: *11: Cost*.
9. Click the *Graphical Indicators* tab to set up indicators and values to display in the column. Go to next page to see choices to be made.

Create a Calculation/Indicator SmartColumn and set conditions for symbols to appear (continued)

Graphical Indicators tab

10. For Column to Compare, choose *13: Budget - Cost*.
11. For Symbol size choose *1.50*.
12. Choose *Align Symbol on Left*.
13. ☑ *Display numerical value also*.
14. Choose *Pre-Selects* (the value parameters and stoplights are already set-up). Click the down arrow to see the preset paraments. Pick the first option to have the *Red symbol for Cost > Budget*; a *green symbol for Budget > Cost*; and a *yellow symbol for Budget = Cost*.
15. Press *OK* to see the completed schedule.

