Milestones PROFESSIONAL® TUTORIALS

Lesson 14
Values SmartColumns

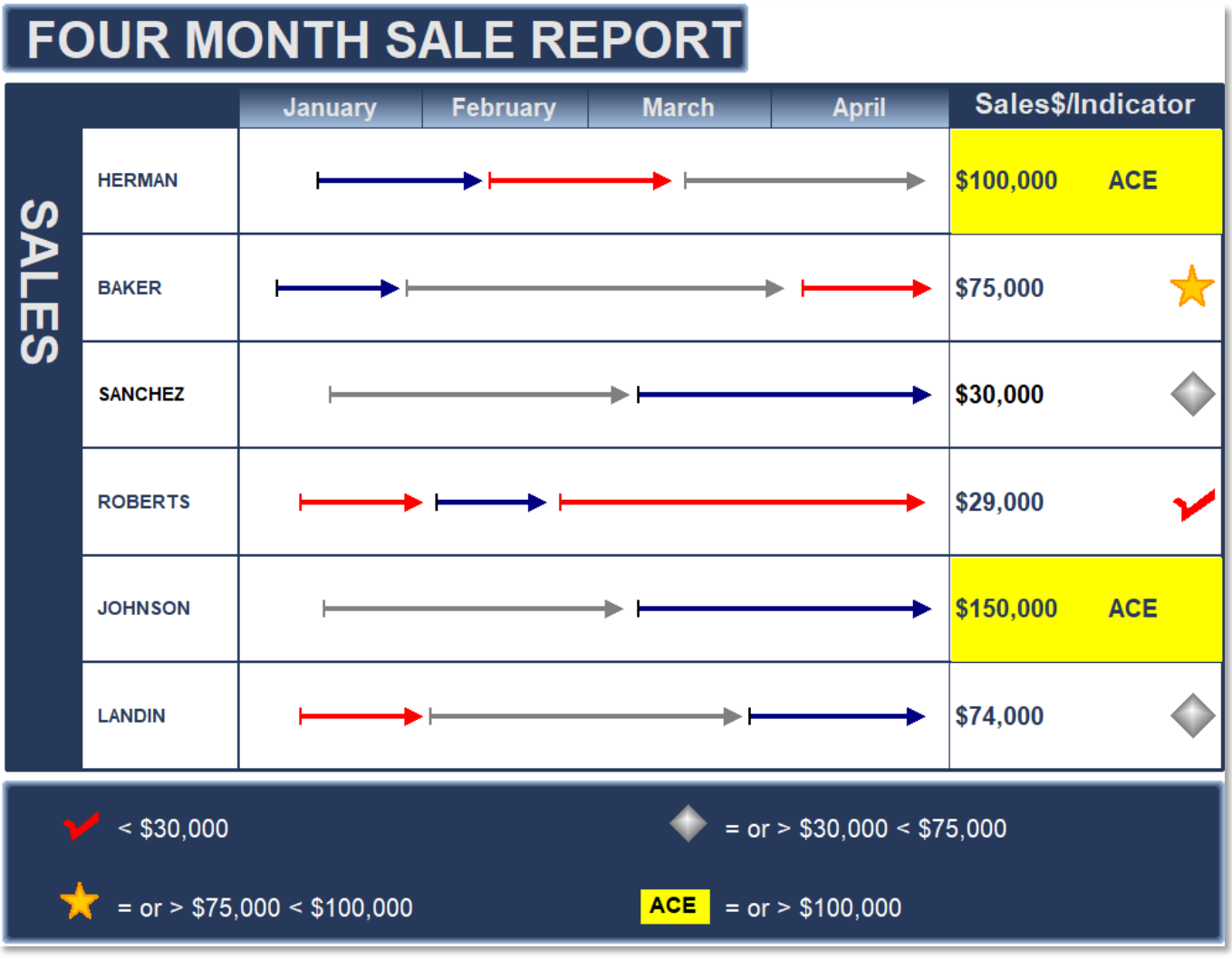
In this lesson you will learn how to:

- Create a Values SmartColumn with indicators
- Set-up the indicators for Values SmartColumn
- Enter sales values and display Indicators

A Values SmartColumn can contain numbers and/or indicator symbols based on the numbers from the same column or another column with values.

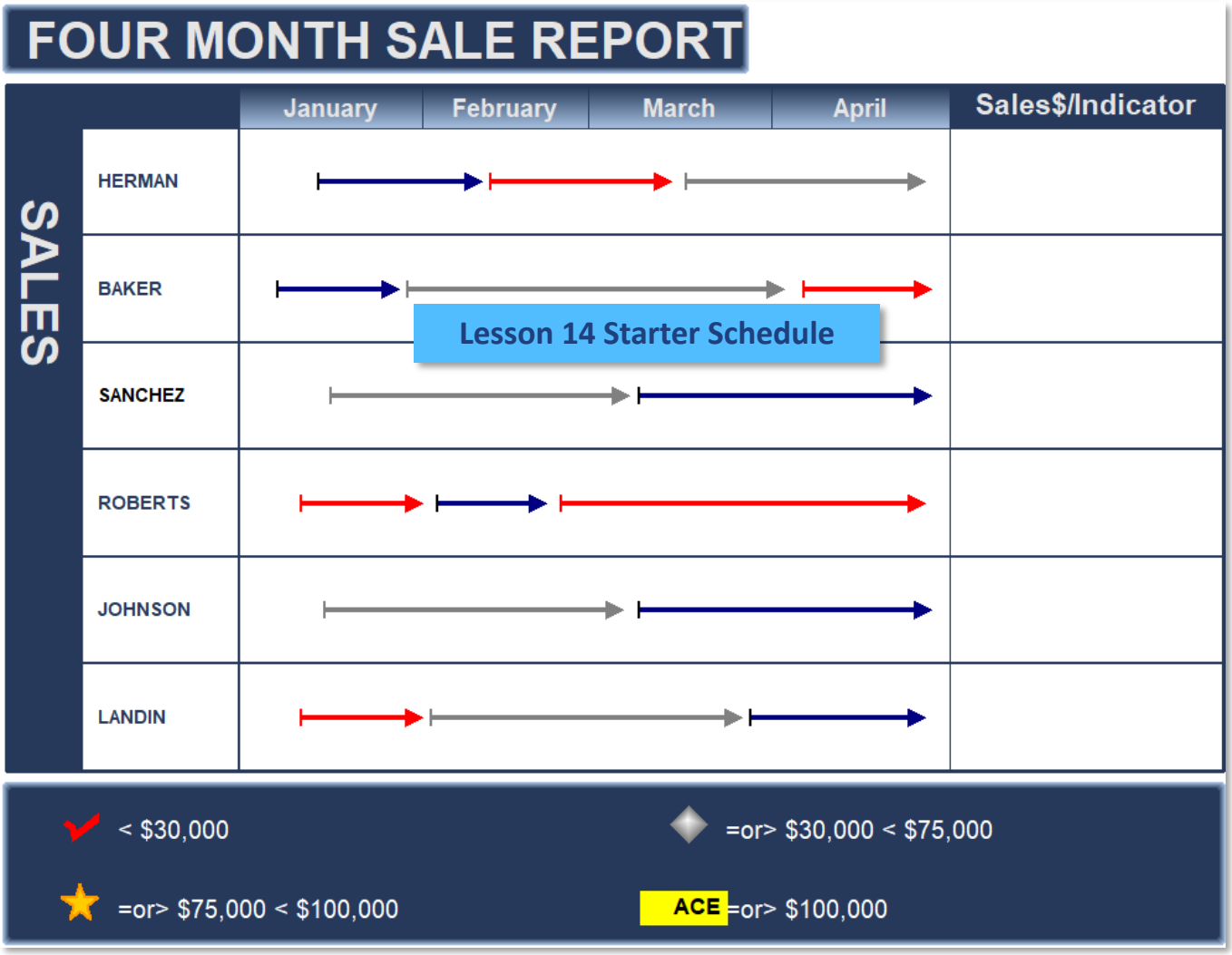
In this lesson the Values will be entered in to a the Sales $/Indicator SmartColumn and indicators will display in the column based on the sales dollar amount.

Indicators can be symbols, a colored cell and/or text.



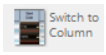
Open the schedule for this Lesson

1. On the Toolbar, choose *File*.
2. In the Files and Templates: Open and Save section select *Open Samples or Lesson*. The Open a Sample Chart dialog displays.
3. Under Select a Folder below to Open select *Lessons*. Pick *Lesson 14 Starter Schedule.mlq*.
4. Save the schedule to an accessible folder on your computer. On the *File* tab, in the Files and Templates: Open and Save section, choose *Save As…*. In the menu that displays choose *Chart*. Name, then save the schedule.

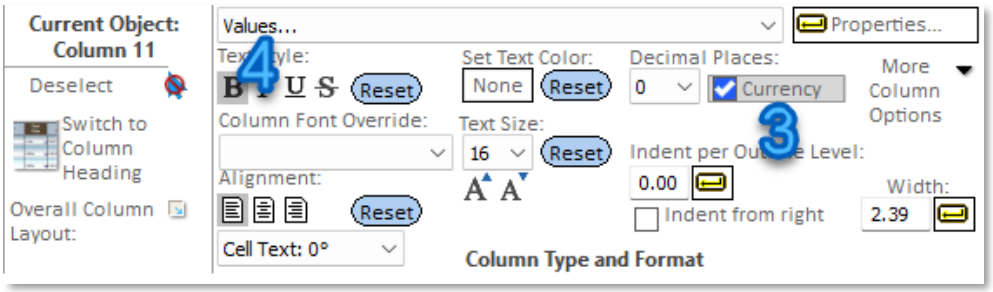


Create a Values SmartColumn with Indicators

You will make the Sales$/Indicator column a Values SmartColumn

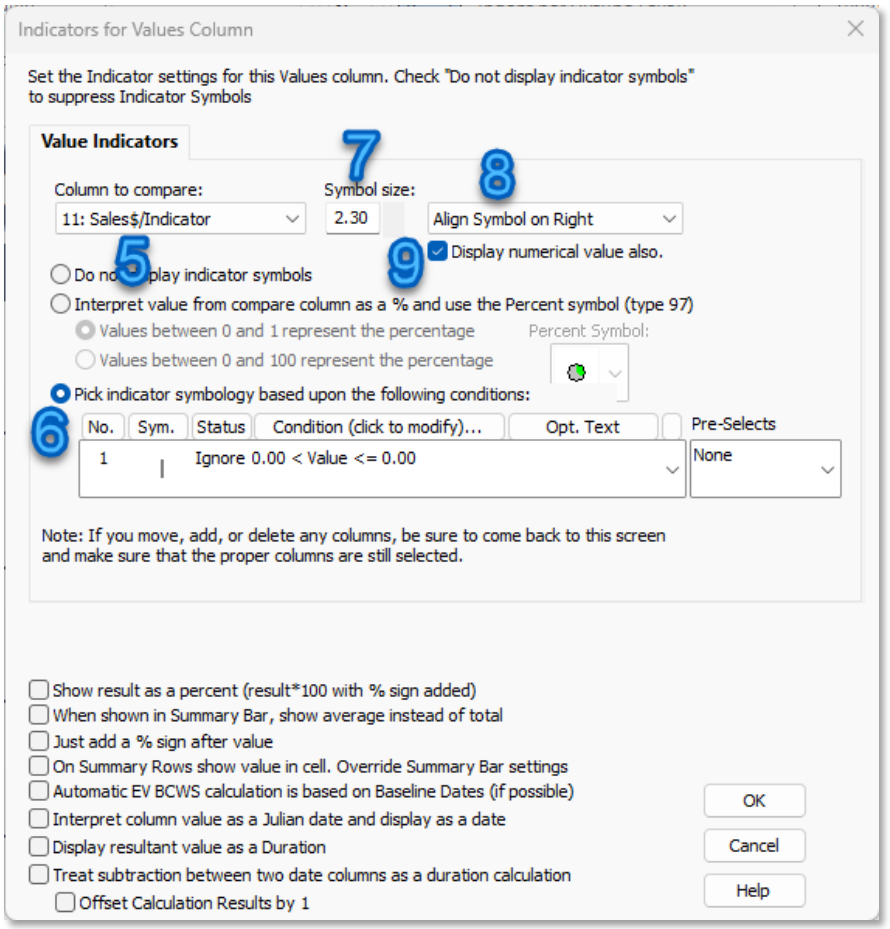
1. Using ↖ (*the toolbox Arrow tool*), click the *Sales$/Indicator* column heading. The toolbar will change to the Selection tab with Current Object: Column Heading.
2. Choose 

Switch to Column. The toolbar will change to the Selection tab with Current Object: Column 11.
3. In the Column Type and Format section under Decimal Places, ☑ *Currency*.
4. 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.



5. For Column to Compare, choose *11: Sales$/Indicator*.

   A Values SmartColumn can contain numbers and/or indicator symbols based on the numbers from the same column or another column with values.
6. Choose *Pick indicator symbology based upon the following conditions*. We will set up the indicators in the next section of the tutorial.
7. Set the Symbol size to *2.30*.
8. Choose *Align Symbol on right*.
9. ☑ *Display numerical value also* to have the column display the added numerical value along with the indicator . Keep this dialog box open for the next set of instructions.



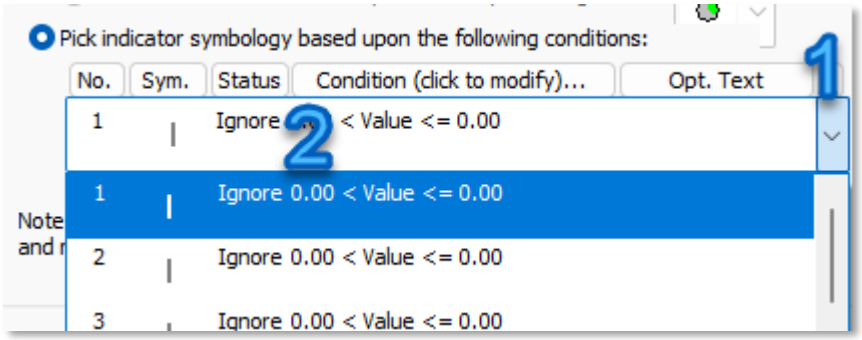
Set-Up Indicators for Values SmartColumn

Symbol indicators

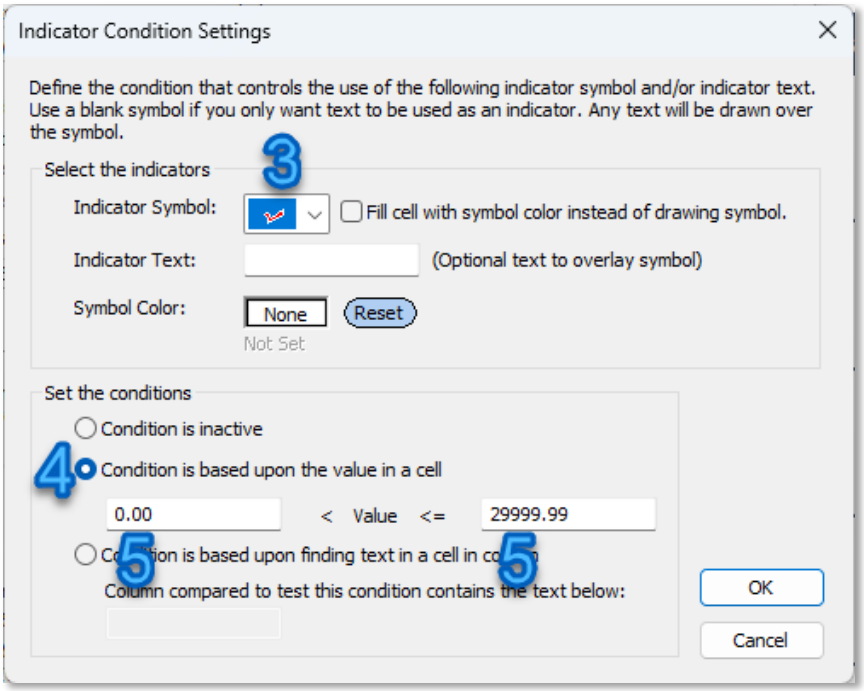
You will assign indicator symbols to sales figures for sales <$30,000, =or> $30,000 < $75,000 and =or> $75,000 < $100,000

Indicator for sales <$30,000

1. Under *Pick indicator symbology based upon the following conditions:* click the down arrow to see 20 Active/Ignored symbols and their conditions.
2. Click on *1 | Ignore 0.00 < Value <=0.00* in the list. The Indicator Condition Settings dialog displays.



3. Click on the Indicator Symbol *down arrow*. From the drop down list of symbols choose the *red checkmark*.
4. Choose *Conditions based upon the value in a cell*.
5. Enter *0* and *29999.99*.
6. Choose *OK* to return to the Indicators for Values Column dialog box (keep this dialog box open for the next set of instructions).

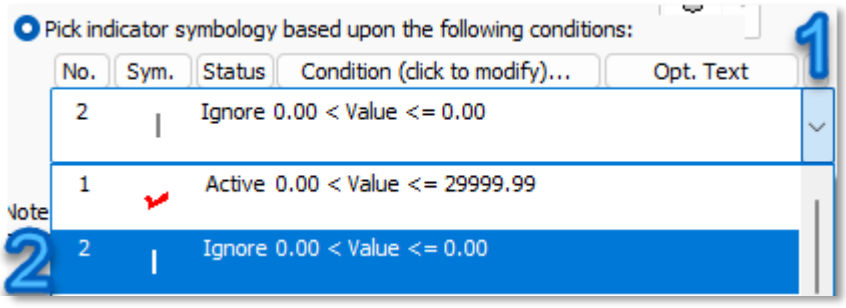


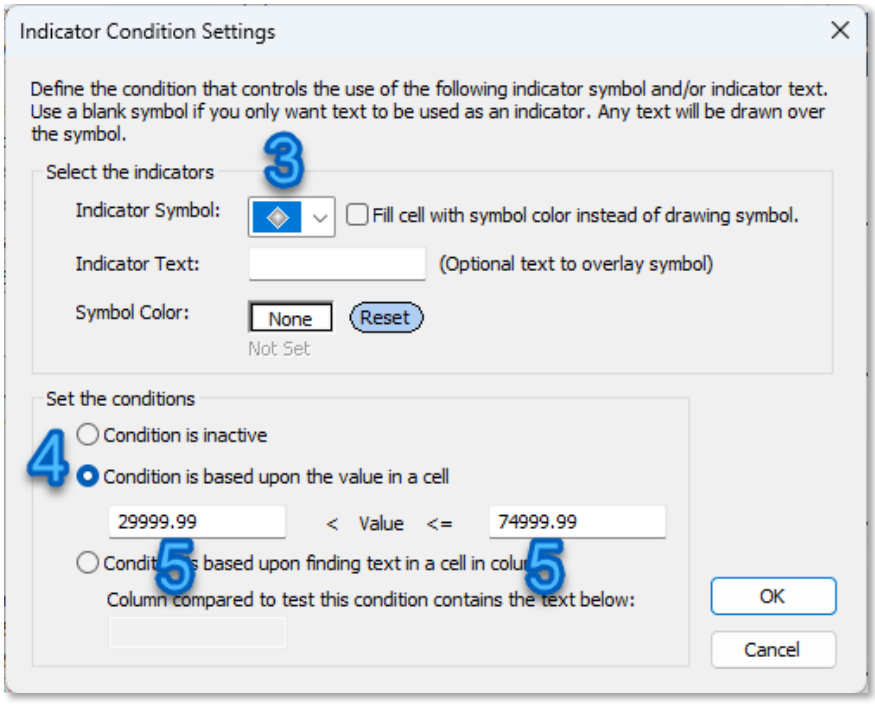
Set-Up Indicators for Values SmartColumn (continued)

Symbol indicators (continued)

Indicator for sales =or> $30,000 < $75,000

1. Under Pick indicator symbology based upon the following conditions: click the *down arrow* to see 20 Active/Ignored symbols and their conditions.
2. Click on *2 | Ignore 0.00 < Value <=0.00* in the list. The Indicator Condition Settings dialog displays.
3. Click on the Indicator Symbol *down arrow*, and from the drop down list of symbols choose the *silver diamond*.
4. Choose *Conditions based upon the value in a cell*.
5. Enter *29999.99*. and *74999.99*.
6. Choose *OK* to return to the Indicators for Values Column dialog



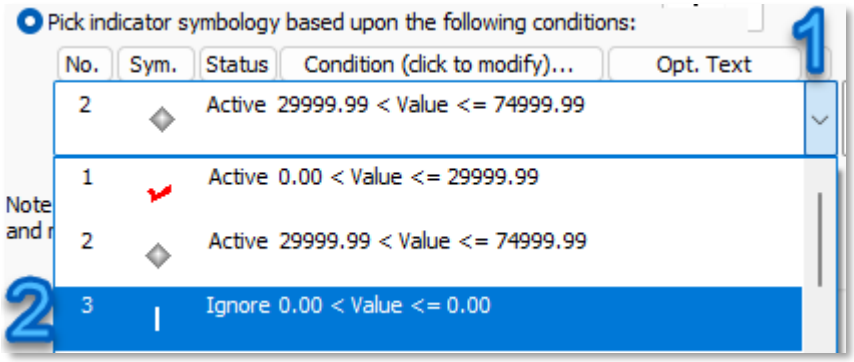


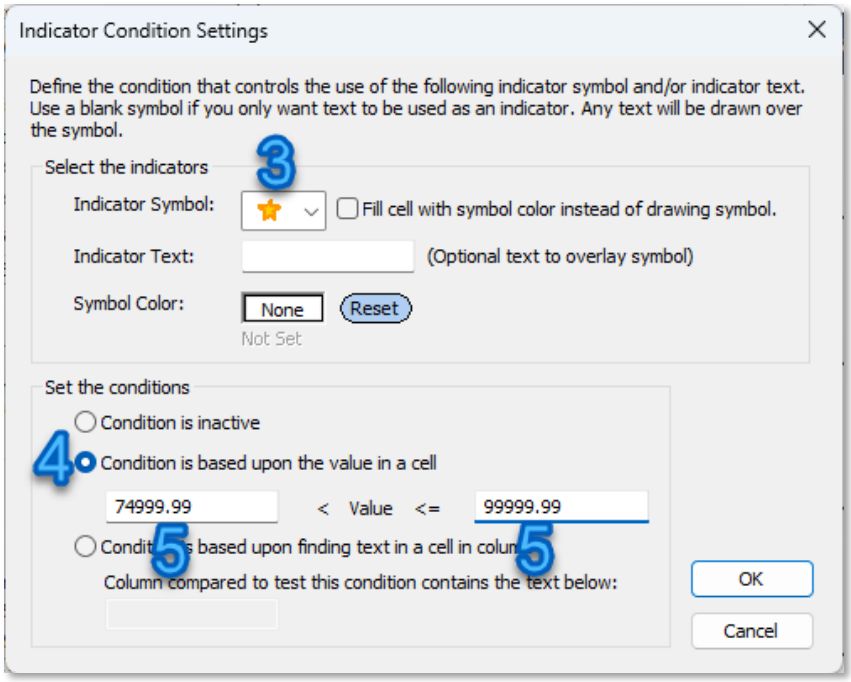
Set-Up Indicators for Values SmartColumn (continued)

Symbol indicators (continued)

Indicator for sales =or> $75,000 < $100,000

1. Under *Pick indicator symbology based upon the following conditions:* click the *down arrow* to see 20 Active/Ignored symbols and their conditions.
2. Click on 3 | Ignore 0.00 < Value <=0.00 in the list. The Indicator Condition Settings dialog displays.
3. Click on the *Indicator Symbol down arrow*, from the drop down list of symbols choose the *gold star*.
4. Choose *Conditions based upon the value in a cell*.
5. Enter *74999.99*. and *99999.99*.
6. Choose *OK* to return to the Indicators for Values Column dialog box. Keep this dialog box open for the next set of instructions.





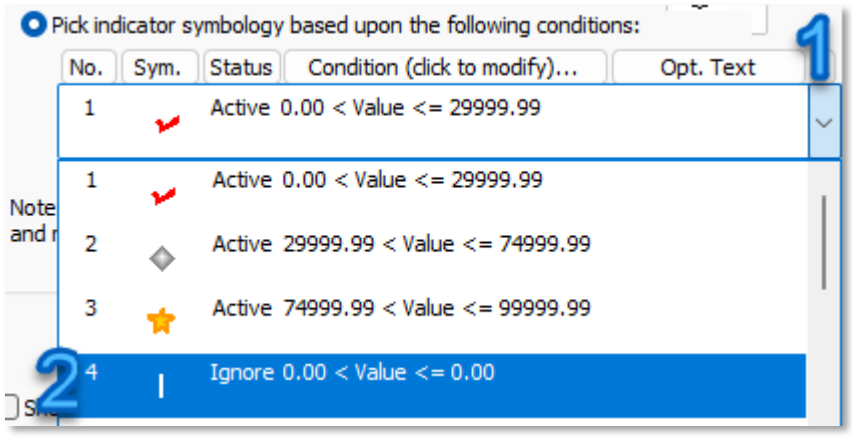
Set-Up Indicators for Values SmartColumn (continued)

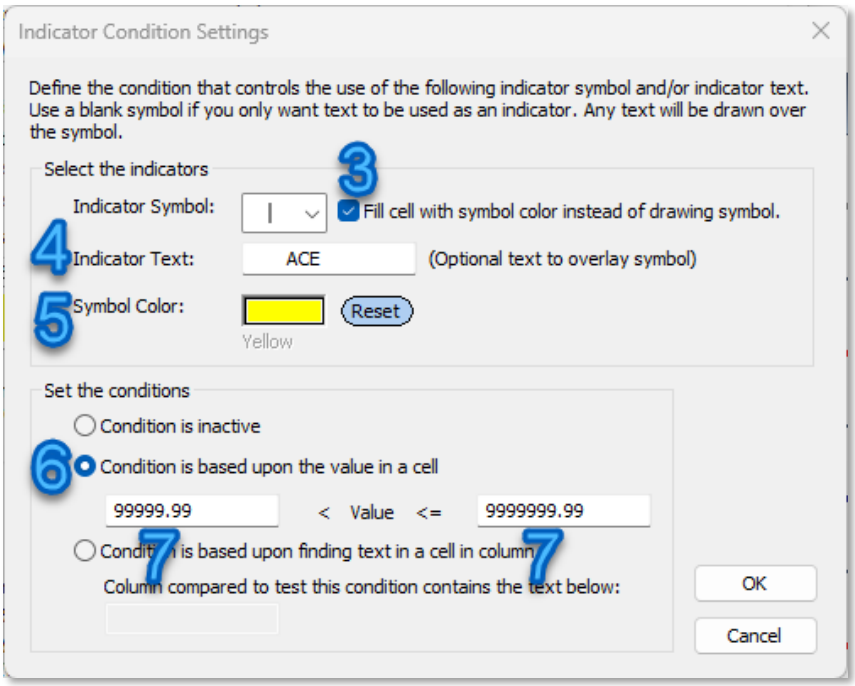
Symbol indicators (continued)

Indicators for sales =or> $100,000 Text and colored cell indicators

1. Under Pick indicator symbology based upon the following conditions: click *the down arrow* to see 20 Active/Ignored symbols and their conditions.
2. Click on *4 | Ignore 0.00 < Value <=0.00* in the list. The Indicator Condition Settings dialog displays.
3. Next to Indicator Symbol ☑*Fill Cell with symbol color instead of drawing symbol*.
4. For Indicator Text select *the space bar 7 times* and then enter *ACE*.

   Entered text defaults to the cell's center. For this indicator text needs to be to the right of the cell, thus using the space bar to position the text.
5. For Symbol Color select *Yellow*.
6. Choose *Conditions based upon the value in a cell*.
7. Enter *99999.99* and *9999999.99*.
8. Choose *OK* to return to the Indicators for Values Column dialog box.
9. Click *OK* again to return to the schedule. Nothing will have changed. You will enter the sales values in the next step, which will then display the set-up indicators in the column.





Enter Sales Values in the Values SmartColumn to Display Indicators

1. Click T (*the toolbox Text tool.*)
2. Click once in *the first cell* of the *Sales$/Indicator* column for Herman.
3. Enter *100000*.
4. Press *Enter*. The cell will populate with the value as currency and indicator for = or > $100,000. Which is indicator 4 and will display yellow background Ace as text in column.
5. Continue by entering the following values for each cell
   Baker*: 75000* **-** The cell will populate with the value as currency and indicator for = or > $75,000 < $100,000. This is indicator 3 and will display a gold star.

   Sanchez*: 30000* **-** The cell will populate with the value as currency and indicator for = or > $30,000< $75,000. This is indicator 2 and will display a silver diamond.

   Roberts*: 29000* - The cell will populate with the value as currency and indicator for < $30,000 . This is indicator 1 and will display a red checkmark**.**

   Johnson*: 150000*, The cell will populate with the value as currency and indicator for = or > $100,000. This is indicator 4 and will display yellow background Ace as text in column.

   Landin*: 74000* After entering this value do not press enter just click out of the cell. This prevents creating a new page. The cell will populate with the value as currency and indicator for = or > $30,000< $75,000. This is indicator 2 and will display a silver diamond.
6. The schedule below and on the first page is the result upon entering all values.

FOUR MONTH SALE REPORT

		January	February	March	April	Sales$/Indicator
SALES	HERMAN	→	→	→		$100,000 ACE
	BAKER	→	→	→	→	$75,000 ★
	SANCHEZ		→	→	→	$30,000 ◆
	ROBERTS	→	→	→	→	$29,000 ✓
	JOHNSON		→	→	→	$150,000 ACE
	LANDIN	→	→	→	→	$74,000 ◆

✓ < $30,000 ◆ = or > $30,000 < $75,000

★ = or > $75,000 < $100,000 ACE = or > $100,000