Milestones PROFESSIONAL®

TUTORIALS

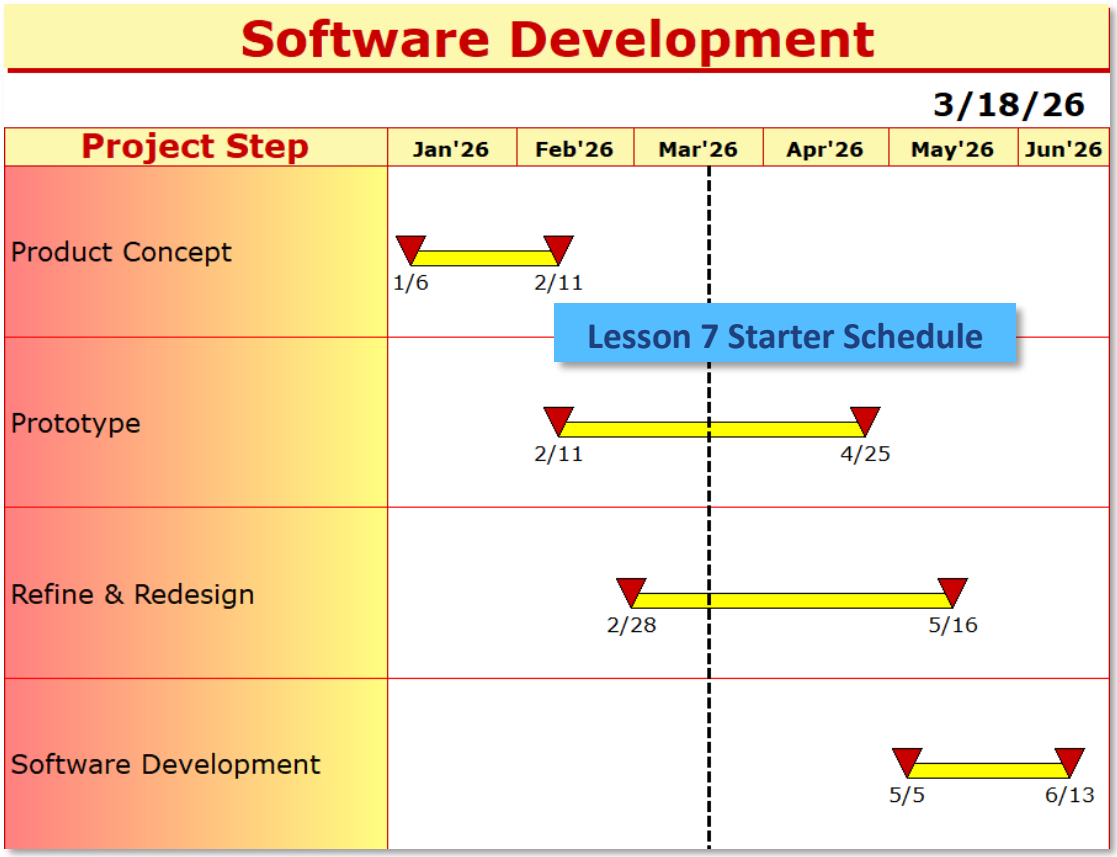
Lesson 7
Show Progress

In this lesson you will learn how to:

- Turn on Symbol and Bar Fill To Status Date.
- Customize after status properties.
- Define a status symbol in the toolbox
- Show ahead or behind using a status symbol
- Add a % complete column with a % indicator symbol
- Change task status by changing the % complete value
- Set % complete for individual bars and symbols
- Add a % complete value to a task in the schedule area

Open the schedule for this Lesson

1. Choose the toolbar *File tab*.
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 and select *Lessons*. The Lesson schedules will display in the window to the right. Pick *Lesson 07 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.

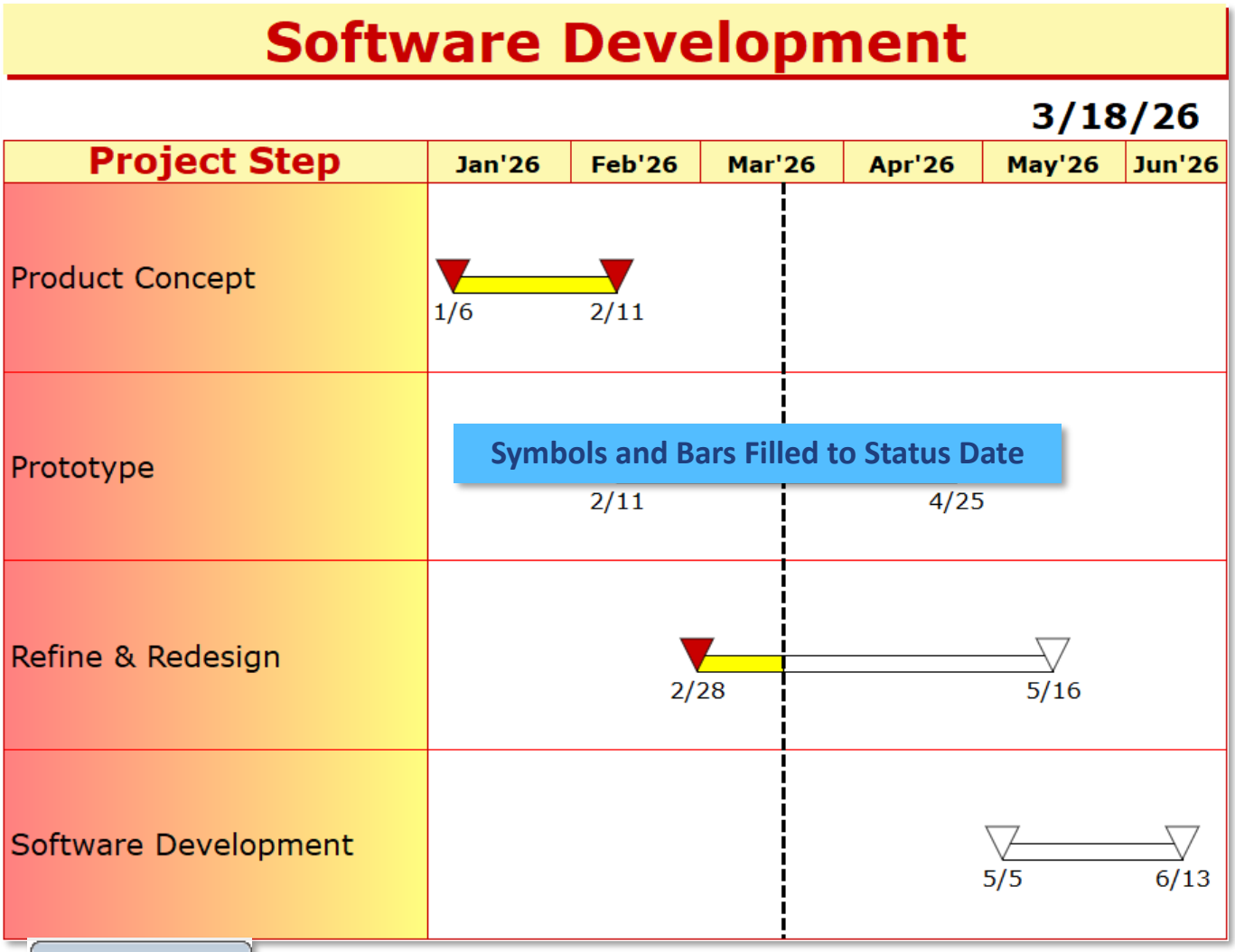


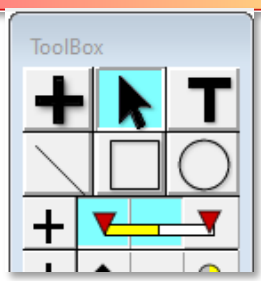
Turn on Symbol and Bar Fill To Status Date

When Fill to Status Date is turned on for symbols and horizontal bars, the symbols and bars are filled with their defined colors up to the status date for the task (by default, this is the current date). After the status date, they are hollow or use a user specified after status color or symbol to indicate future, incomplete activity.

The current date for the example schedule is 3/18/26. The current date is illustrated by the vertical dotted line on the schedule.

1. Choose the toolbar *Dates tab*.
2. In the Date Related Settings ☑ *Symbols: Fill to Status Date.* Note the symbols before current date (complete) are filled with color and after the current date (incomplete) are not filled with color.
3. In the Date Related Settings ☑ *Bars: Fill to Status Date*. Note the horizontal bars before current date (complete) are filled with color and after the current date (incomplete) are not filled with color.



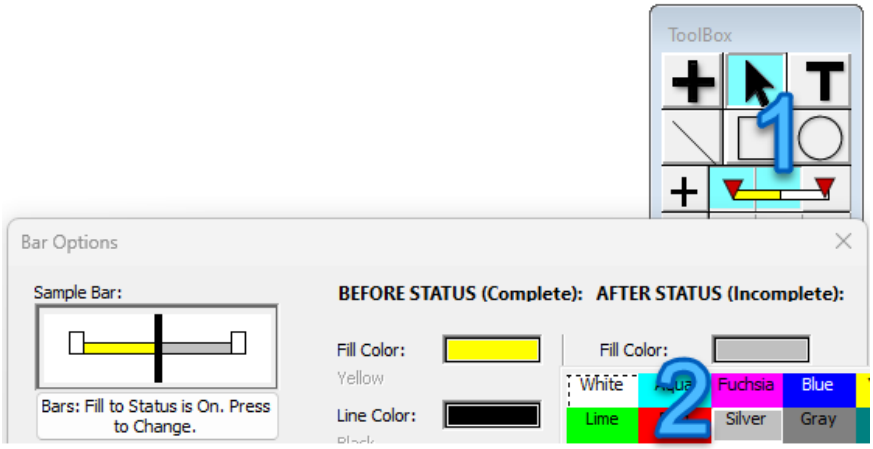


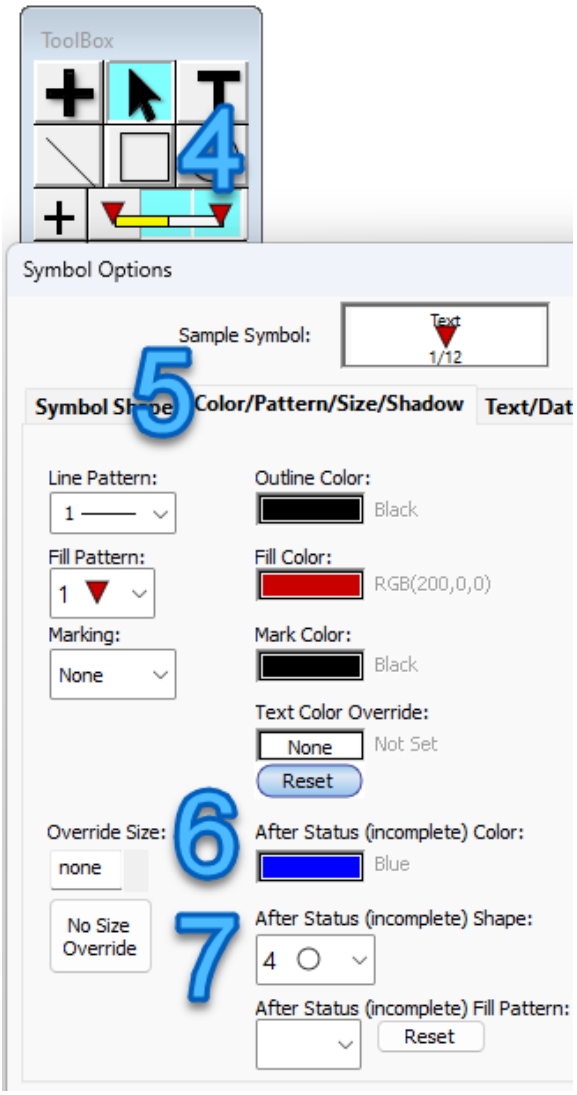
The toolbox will also reflect the bar color change. This feature can be turned on or off. Right click the ToolBox. Select **Toolbox Properties.** ☑ **In Bars, show both before and after status colors (If Bars Fill to Status is active)**.

Customize the after status properties

The incomplete portion of the bar (after status) can be filled with a color other than white. After status symbols can be filled with a color or be a different shape. When complete, the symbol will change back to the original symbol in the toolbox.

1. In the toolbox, double-click the *yellow bar*. The Bar Options dialog box displays.
2. Under AFTER STATUS (Incomplete): Fill Color: select the color rectangle to open the color palette and choose *Silver*.
3. Press *OK*. The incomplete portion of the bar is now silver. See next page for a picture of the result.



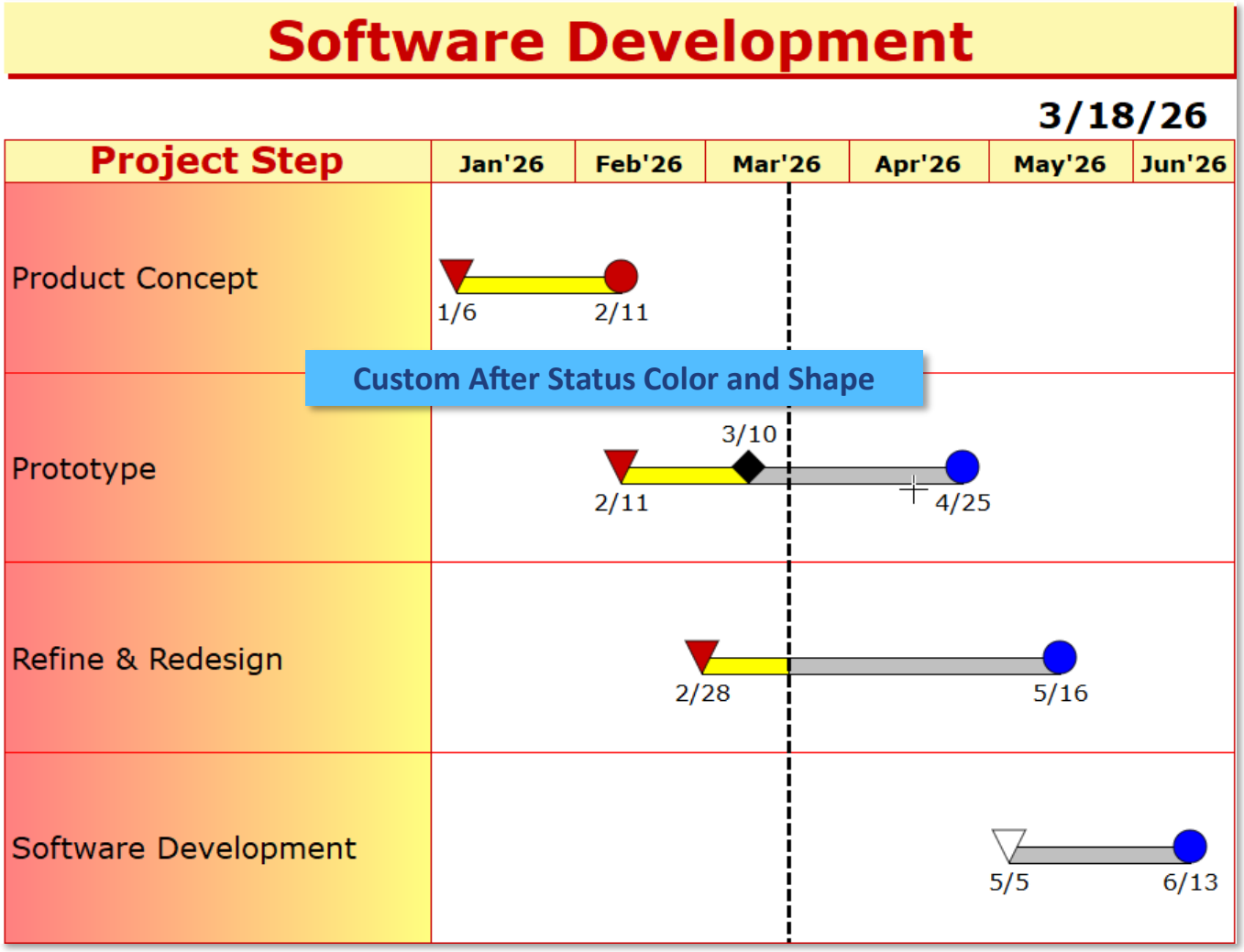


4. In the toolbox, double-click the *upside down red triangle on the right*. The Symbol Options dialog box will display.
5. Choose the *Color/Pattern/Size/Shadow* tab.
6. Select the *color rectangle* below After Status (incomplete) Color to open the color palette and choose *blue*.
7. Change the After Status (incomplete) Shape: to shape *#4 (a circle).*
8. Click *OK*. The symbols which are after the status date (incomplete) have changed to a blue circle. Once the task is complete the bar will fill in yellow and the blue circle will become a red upside down triangle, like the Product Concept task.

The symbols available for the after status shape are the symbols from the toolbox.

Customize the after status properties (continued)

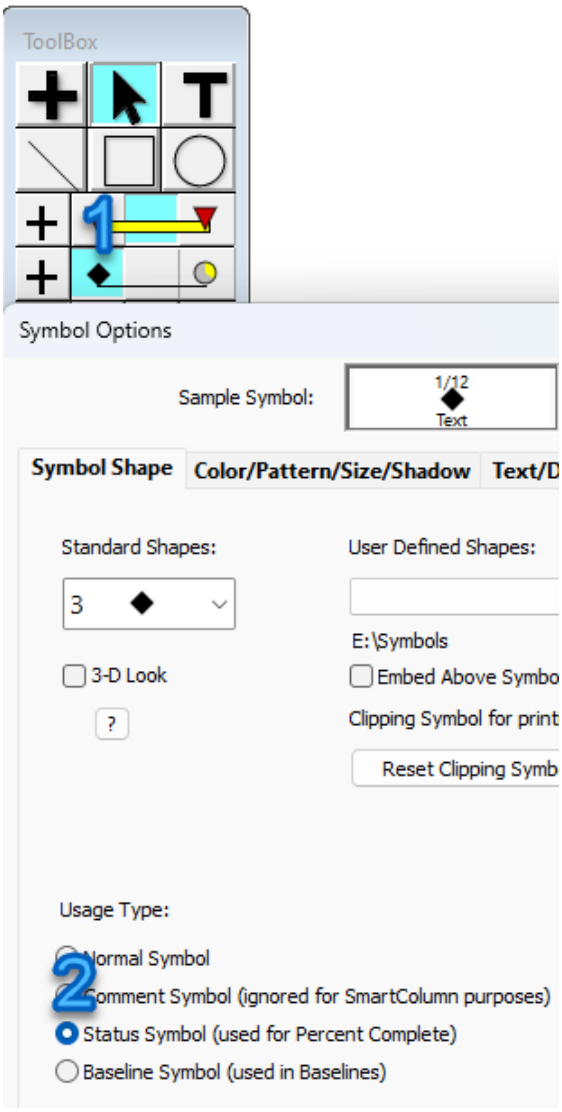
Results



Define a status symbol in the toolbox

Project tasks may need to indicate one or more of the steps as ahead or behind schedule. A "status" symbol is one way of controlling how much each task is ahead or behind. A status symbol can be any symbol in your toolbox.

1. In the toolbox, double-click the *black diamond symbol*. The Symbol Options dialog box displays.
2. On the Symbol Shape tab, click the button next to *Status Symbol (used for Percent Complete)* so that it is selected.
3. Click *OK*.



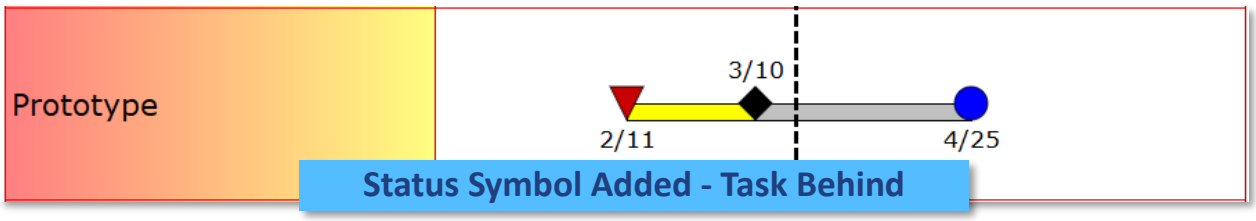
Show ahead or behind using a status symbol

Change Prototype to be behind schedule

1. Click + (the large toolbox *plus tool*.)
2. In the toolbox, click once on the *black diamond symbol* (now a status symbol) it will highlight.
3. Move your cursor to the *Prototype task row* in the schedule area between the red upside down triangle 2/11 and the blue circle 4/25.

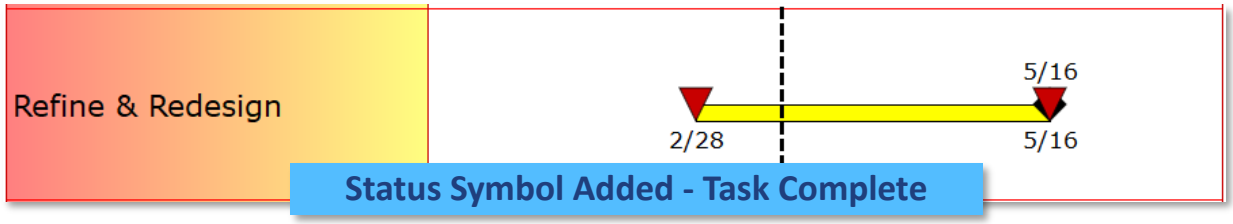
   The S next to the crosshairs cursor indicates that you are about to add a Status Symbol. The % next to the cursor reminds you that the status symbol controls percent complete.

4. Click and hold the *left-mouse button*, and then drag until you see the *3/10/26* date next to the cursor or in the status bar at the bottom left of the milestones window. Release the mouse button to add the status symbol. Prototype is now shown to be behind schedule.



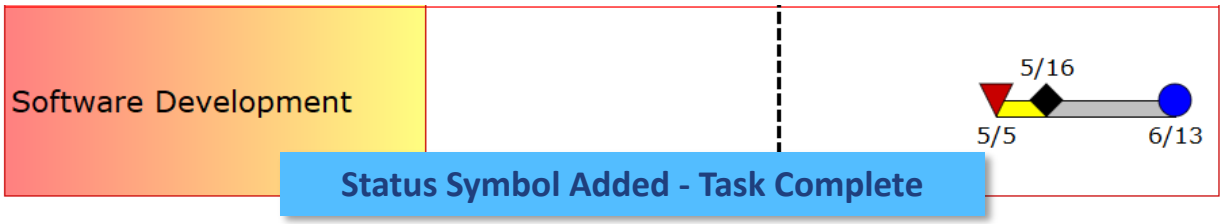
Change Refine & Redesign to be complete

1. Click + (the large toolbox *plus tool*.)
2. In the toolbox, click once on the *black diamond symbol* (now a status symbol). it will highlight.
3. Move your cursor to the *Refine & Redesign* task row in the schedule area between the red 2/28 triangle and the blue 5/16 circle.
4. Click, hold, drag and release to add the status symbol on *5/16/26* to the Refine & Redesign task row. Refine & Redesign is now complete, the entire bar will be colored yellow and the blue circle will change back to the complete symbol (a red upside down triangle).



Change Software Development to be ahead of schedule

1. Click + (the large toolbox *plus tool*.)
2. In the toolbox, click once on the *black diamond symbol*, and it will highlight.
3. Move your cursor to the *Refine & Redesign* task row in the schedule area between the red 5/5 triangle and the blue 6/13 circle.
4. Click, hold, drag and release to add the status symbol on *5/16/26* to the Software Development task row. Software Development is now shown to be ahead of schedule.

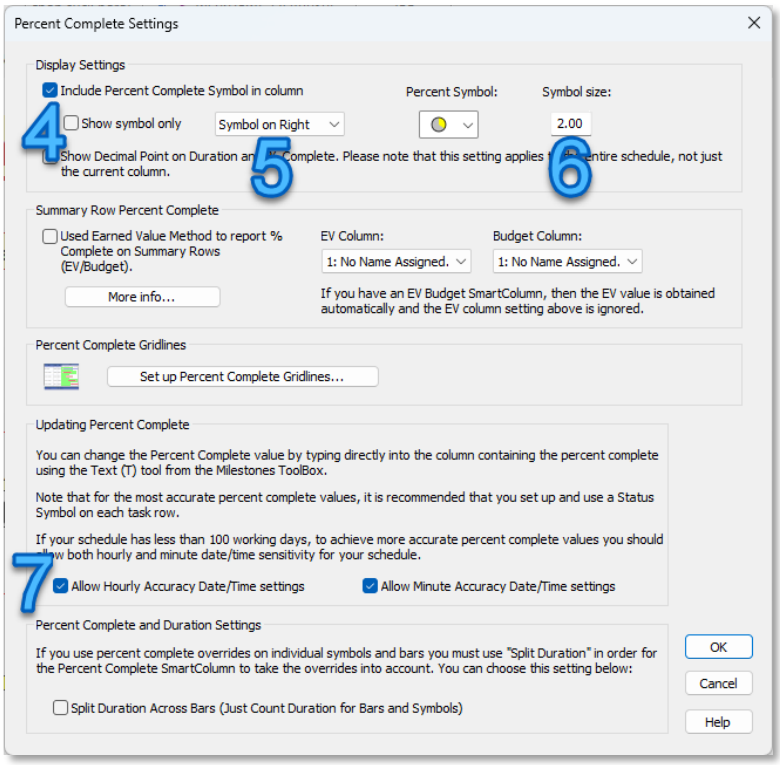


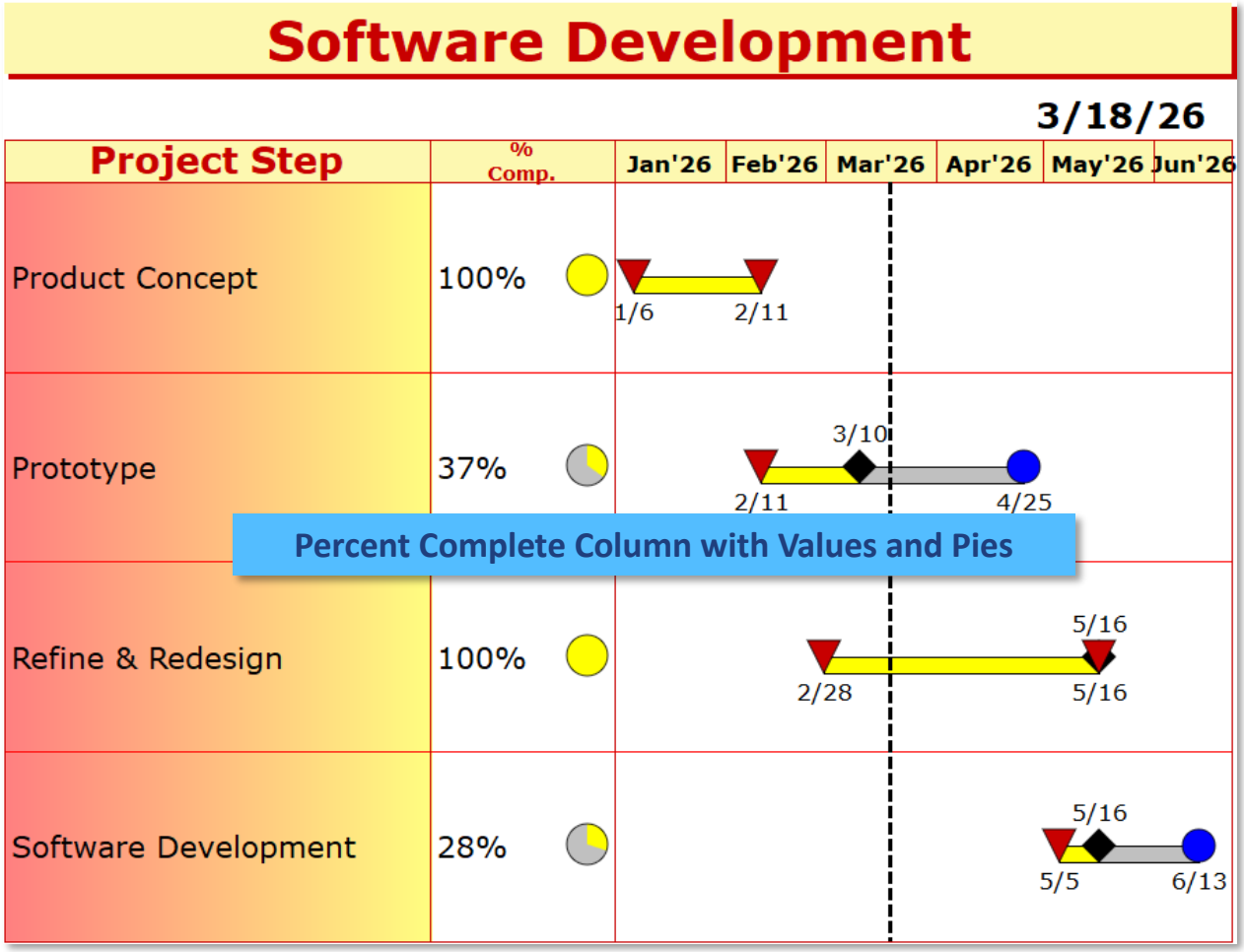
Add a percent complete column with a percent indicator symbol

1. Choose the toolbar *Insert tab*.
2. In the Rows, Columns section choose *New Column*.
3. From the menu choose *Percent Complete*. The Percent Complete Settings dialog box displays.
4. Under Display Settings ☑ Include Percent Complete Symbol in column.

> The % complete symbol that is set for this schedule is shape 97 in the ToolBox.

5. Under Display Settings choose *Symbol on Right.*
6. For Symbol Size, scroll to *2.00*.
7. For accurate percent complete. In Updating Percent Complete section, ☑ *Allow Hourly Accuracy Date/Time Settings and Allow Minute Accuracy Date/Time Settings.*
8. Select *OK*. Then *OK* again. A percent complete column with percent values



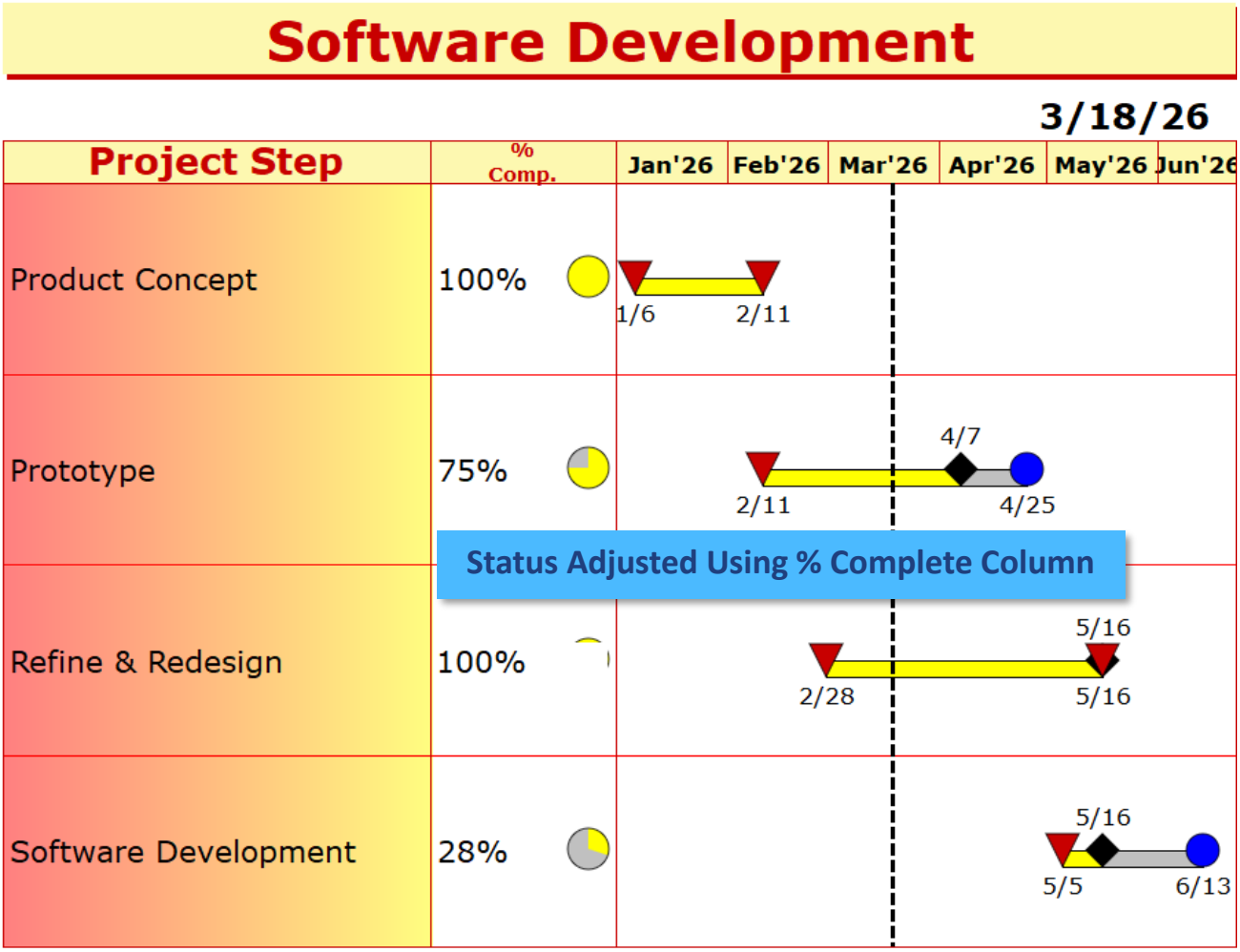


Change task status by changing the percent complete value

1. Click T (the toolbox *Text tool*.)
2. On the Prototype task row in the % complete cell click and backspace through the *37%* .
3. Type *75*.
4. Press *Enter* on the keyboard.

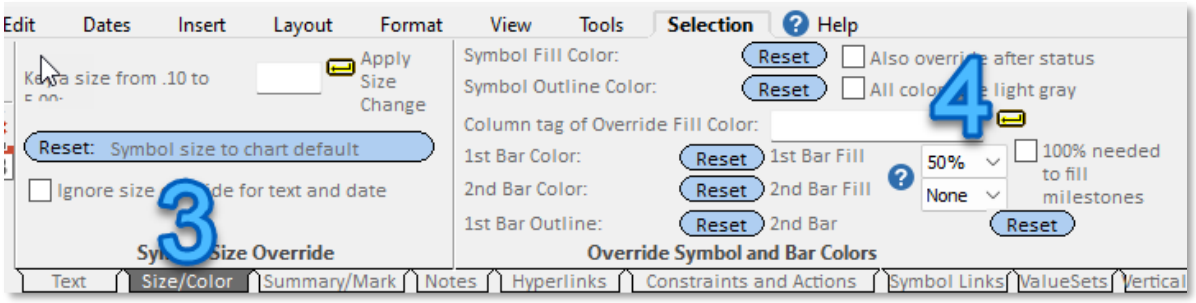
The Prototype percent complete pie symbol has changed to reflect 75% complete and the bar on the schedule is now shaded to 75%. Also, the status date has changed from 3/10 to 4/7.

The percent complete column value can also be changed using the Arrow tool in the toolbox. Click and drag the status symbol to the updated location. The percent complete reading will change to match the new status symbol placement.



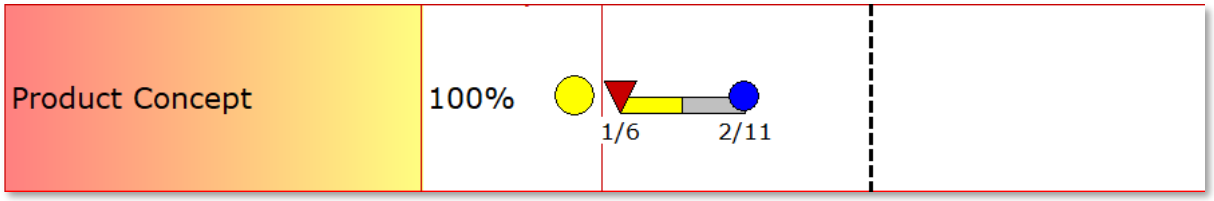
Set percent complete for individual bars and symbols

Bars and symbols can have percent complete assigned to them. This option is usually used when there our multiple task on a single task row.
For this tutorial we will continue using the current schedule and change the percent complete for the Product concept task.



1. Click ↖(*the toolbox arrow tool*.)
2. On the Product Concept task row click the *red upside down triangle on 1/6*, and it will highlight with a box around it. The toolbar at the top of the Milestones window is now active for that symbol as the Selection tab with Current Object: Symbol.
3. Choose the small *Size/Color* tab at the bottom of the toolbar.
4. In the Override Symbol and Bar Colors section in the box next to *1st Bar Fill %* select the drop down arrow scroll to *50%* and select it. 50% of the bar will be filled yellow.

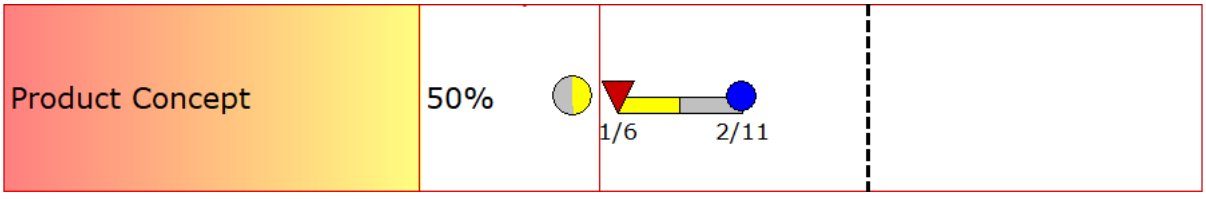
If two bars originate from a symbol for the second bar's percent override select 2nd Bar Fill %.



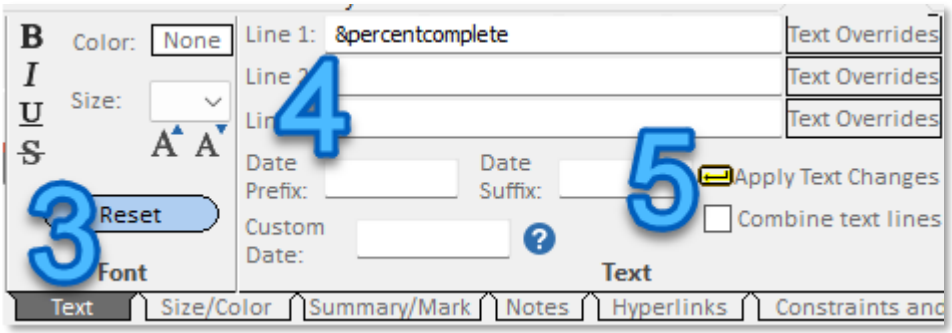
Note the percent complete column does not change. To have the percent complete column calculate when individual bar's % is set the option Split Duration Across Bars needs to be turned on.

Turn on Split Duration Across Bars option.

1. Right-click the *% Comp. column's heading.*
2. Choose *Properties*.
3. In the Column Properties dialog, click the *Column Type (SmartColumn) Settings* tab.
4. Select the *Properties* button.
5. At the bottom of the Percent Complete Settings dialog box ☑ *Split Duration Across Bars*.
6. Select *OK*.



Add a % complete value to a task in the schedule area



1. Click ↖(*the toolbox Arrow tool*.)
2. On the Prototype task row click the *red upside down triangle on 2/11*, it will highlight with a box around it. The toolbar at the top of the Milestones window is now active for that symbol as the Selection tab with Current Object: Symbol.
3. Choose the small *Text tab* at the bottom of the toolbar.
4. In the Text section next to Line 1: enter *&percentcomplete*
5. Press the *Apply Text Changes* button. 75% will now display above the triangle.

For multiple tasks on a single task row follow the above direction, however type ***&barfill1percent %***.
If two bars originate from a symbol for the second bar's percent type: ***&barfill2percent %***.

