Manual

Intro

Welcome to the SummaryPro manual, updated for the 2026+ version. This manual will help you better understand and use SummaryPro to produce the Plan-on-a-Page (POAP) summaries you need to communicate to your audiences effectively.

Within the manual, the following conventions are used:

- Key presses / strokes on the keyboard are enclosed in <> arrows, for instance <return>.
- Multiple Keys are to be pressed simultaneously and strung together, e.g. <CTRL><C> for copy.
- When there is a sequence of key presses, these are separated by a comma, for instance, to paste special: value <ALT><E>, <S>,<V>.
- Multiple menu selections are separated by / for instance the same paste special would be menu: home / paste / values.
- Tab names in workbooks will be shown as STANDARD SETTINGS.

The guide will show the key presses as this is the fastest way to move through the interface; however, the same results can be achieved using the mouse.

Where the play symbol (left) is shown, a companion video illustrates the instructions.

For more information, please visit www.SummaryPro.co.uk. The pre-2025 manual is here.

High-level Contents

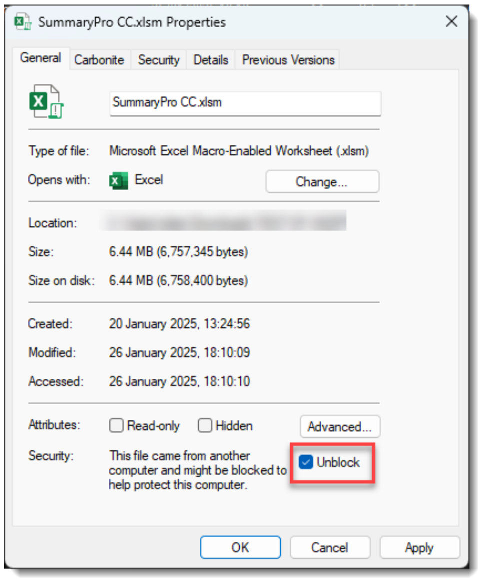
Getting started

To start using SummaryPro, you will need to:

1. Extract the file from the zip and move them as required.
2. Allow macros to run in Excel and trust macros signed by VisiPlan.
3. Initiate the trial from Excel.
4. Open the SummaryPro stencils in Visio.
5. Ensure that Visio can run macros.

1. Extracting the files from the ZIP

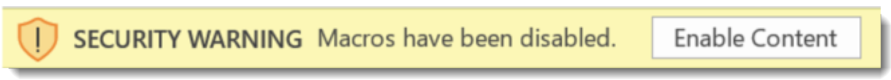
- Download the full function trial.
- Right-click on the downloaded Zip file and use Extract All to unpack the zip file to a location of your choice.
- Right-mouse on each file, choose properties, and click the "unblock" checkbox. This tells Windows that you trust the file downloaded from the Internet.



- Copy or move the file as shown below:
  - The SummaryPro **Excel** and **Visio** pair of files to your preferred location.
  - The Visio stencils (**SummaryPro Shapes.vss** and **SummaryPro.vss**) to the folder where Visio stores stencils (usually **My Shapes** in your Documents folder).
- Save a backup of the original Excel and Visio files for future use.

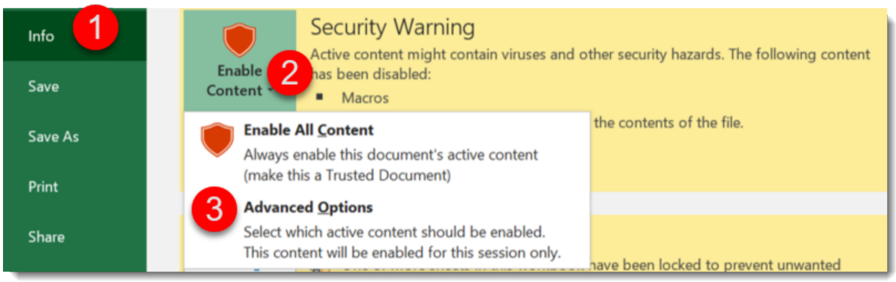
2. Allow macros to run in Excel

- Open Excel, click on File / Options / Trust Centre / Trust Center Settings / Macro settings, and select "Disable VBA except for digitally signed macros".
- Close Excel.
- Open one of your SummaryPro Excel files; a warning will be displayed (below) to alert you that the workbook contains macros. This is normal.

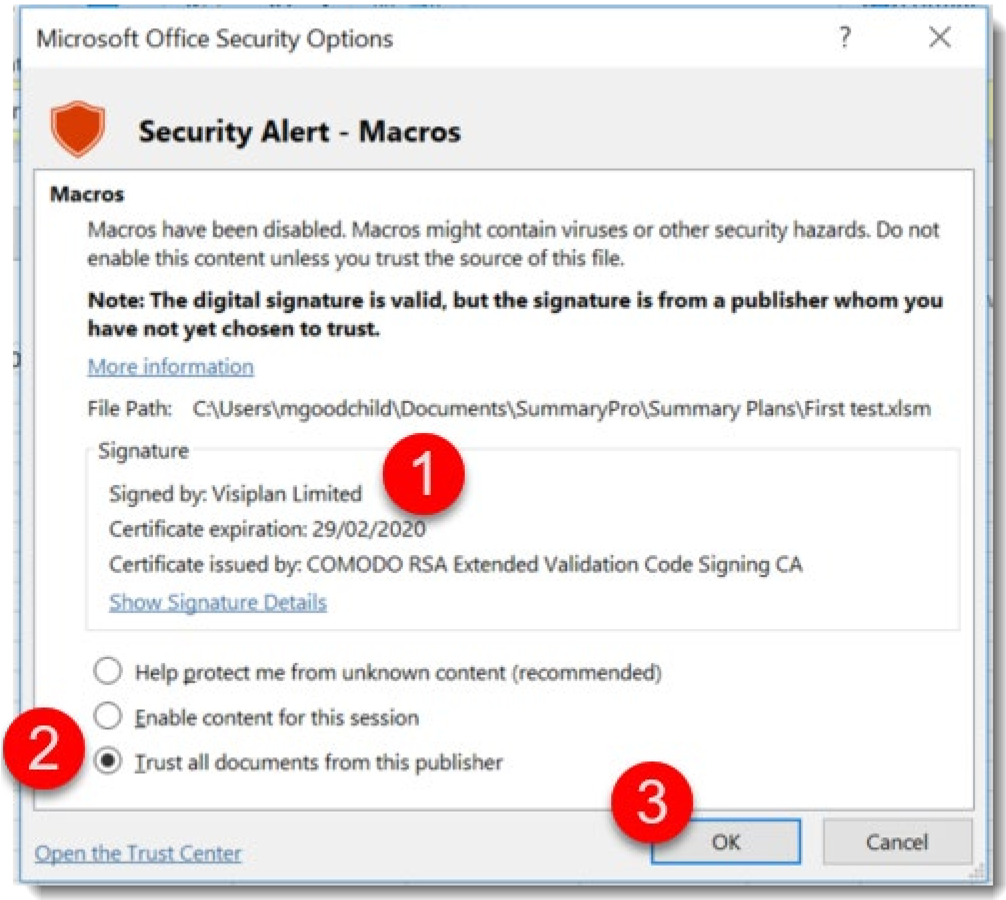


Simply clicking on the “Enable content” button will enable the macros and SummaryPro to function. However, it is better to trust all content from VisiPlan so that this warning doesn’t interrupt your work in future. This also allows you to inspect the certificate to confirm that it is OK.

To trust content from VisiPan, click on the File menu, then Info on the left-hand side, click on the “Enable content” button in the Security warning section and select “Advanced Options”.



This displays the “Security alert—Macros” dialogue, in which you can confirm that the digital signature or code signing certificate is valid and issued by VisiPlan. If you click on “Show Signature Details”, you can see more details about the certificate.

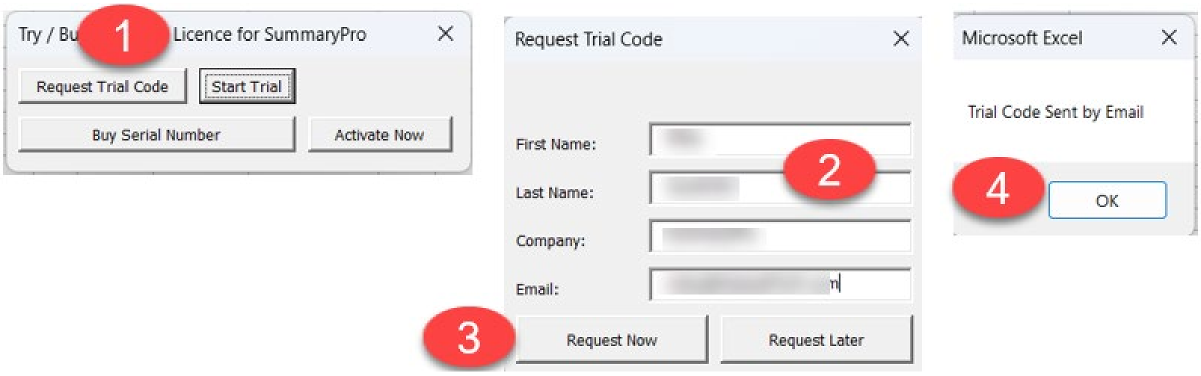


Clicking “Trust all documents from this publisher” and OK will allow the macros vital to SummaryPro to run.

3. Start the 21-day free SummaryPro trial

- When you have authorised macros to run in Excel, the trial dialogue will open. If the dialogue doesn't open, close and re-open the SummaryPro Excel file.
- Select which type of licence you would prefer if you decide to proceed with the purchase (subscription or perpetual licence). This does not commit you to anything.
- To start your trial, click the "Request Trial Code" button, fill in the form and click "Request Now". A message saying that the code will be sent by email will appear, and then Excel will close when you click OK.

- If you already have a licence, click the "Activate Now" button, enter your details and jump to step 4.



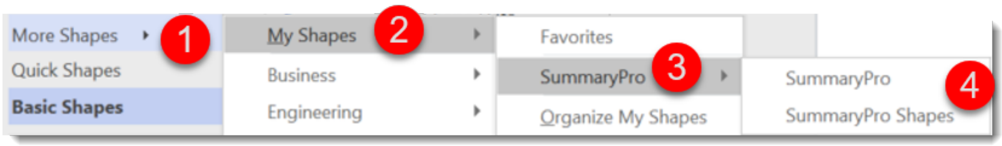
- Check your email (including the Spam folder); 2 identical messages may appear as we use two email routes to ensure your message gets to you. Copy the Activation code.

- Re-open the SummaryPro Excel file, click "Start Trial", paste in the activation code and click "Activate Now".
- Excel is now set up; your 21-day trial has started.
- Note that when you have tested SummaryPro and confirmed that it will make your life easier you also use this dialogue to either:
  - purchase a license or
  - enter an existing license number as needed.

4. Open the stencils in Visio

Open the Visio SummaryPro file and repeat the step below for each stencil:

- Click on the "More Shapes" button on the left-hand side, select "My Shapes" and then select "SummaryPro Shapes.



- Do the same again to open "SummaryPro".

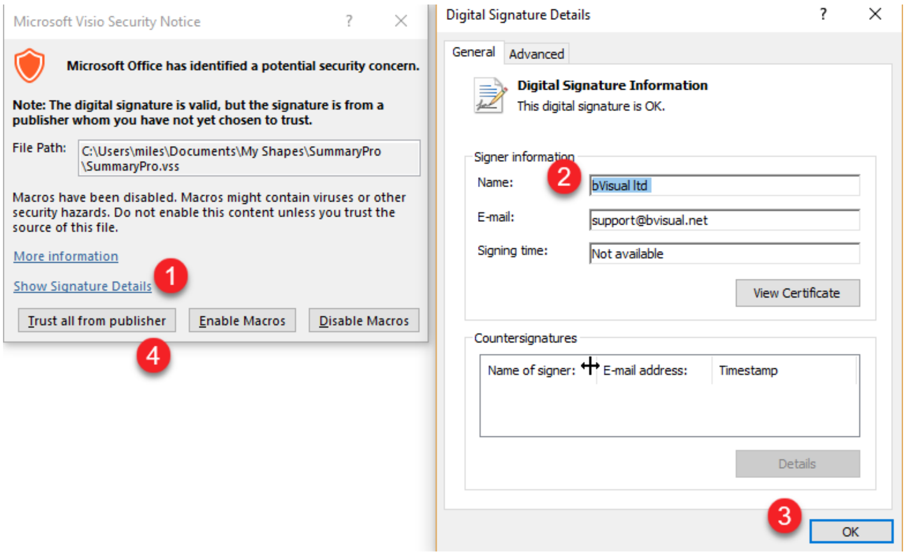
The two stencils have specific purposes:

- SummaryPro.vss – This contains the upating macro, it must always be open, but you don't have to do anything with it.
- SummaryPro Shapes.vss – This contains all the shapes that can be used to highlight or label items in your POAP, the most useful of which is the "sticky comment" which will move with the shape it is attached to.

When the SummaryPro stencil opens, you may see a banner warning about Macros; follow the instructions below to accept VisiPlan as a trusted publisher.

5. Enabling Macros and trusting VisiPlan's SummaryPro macros

VisiPlan has signed the updating macro in Visio and should be trusted by clicking on the dialogue that appears the first time you open a SummaryPro Visio file.



Getting to know SummaryPro

A quick introduction to using SummaryPro

SummaryPro is designed around the central concept that a matched pair of files produce each report or Plan on a Page:

- The Excel engine receives the information and does all the calculations to generate the report.
- The Visio display produces the summary plan.

As such, SummaryPro is inherently suitable for using an existing report as a template for another, allowing a common look and feel to reports if desired. The combination of Excel and Visio provides a very high degree of customisation of the report to meet your needs – “your plan, displayed your way”. The fact that you copy data into the Excel engine means it can accept data from an extensive range of sources (indeed, you can manually enter dates). It also allows you to combine data from different sources into one summary plan.

Both the Excel engine and the Visio display file use macros, so you need to allow macros or “enable content” for SummaryPro to work – for more details see the section “Macro Security” on page 64.

Introducing the Excel Engine

When you open the Excel engine, you will see several tabs or worksheets that accept data or allow you to set up the report.

Standard Settings: Holds all settings

This sheet contains all the settings controlling amongst other things:

- The date range of the summary.
- How big the bars and milestones are.
- The behaviour of milestones, should the report show progress, RAG, baseline, critical path, etc (assuming the data is available).
- How the timescales will be formatted.

Shapes: Sets the defaults for bar shapes and Milestones

Sets the variables for shapes (corner rounding etc) and the standard sizes of milestones (which can be varied by individual styles).

Styles: Sets the Styles (colours etc) for use in your report

Define how the timescales will look, and set up “Styles” to be applied to bars and milestones, which will control the shape, colour of fill, lines, and text. Set standard colours for RAG etc.

Bar Details: Define where each bar will appear

The dates for each item control where they are displayed horizontally; however you have complete control over where they appear vertically in this sheet. You also define which items will be displayed and have access to a few different ways of displaying dates (hidden attachment points, overlay bars, and timespans).

You can also set a specific task to span multiple rows and quickly and easily add and remove rows from the summary.

Dependency Details: Define where dependencies will start and finish on the page

Controls which items are involved in both sides of the Supplier / Customer side of the dependency and hence where the start and finish of the dependency should be.

This sheet also alerts you to possible issues with each dependency, for instance, it is facing issues as the “give” date is after the “get” date in the plan. In this way, it acts as a second line of defence against showing poor dependency management.

Dates and Bars Import: All the date information for bars and milestones

This sheet is where your plans' detailed date information is copied into the SummaryPro engine. This is where the relationship between the reference for each bar or milestone in the Plan on a Page and the dates to be displayed is calculated.

This sheet will also help by flagging incorrectly formatted dates which will cause issues.

Dependency Import: All information about dependencies

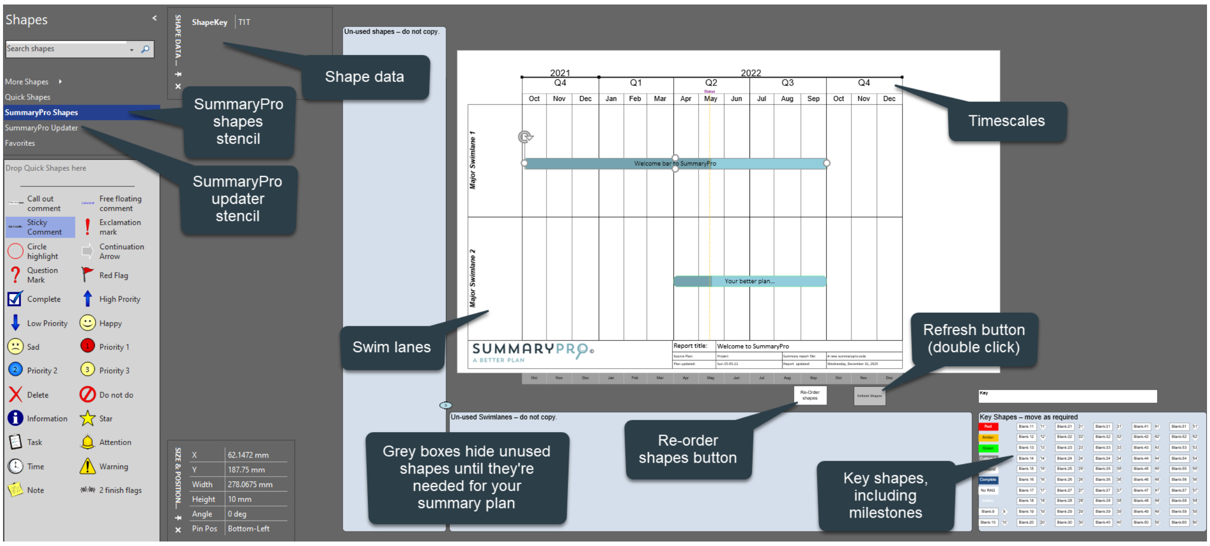
This is the input sheet for all dependency information. Ideally both sides of each dependency are entered, each coded with a reference so that they can be matched up. Again this sheet will check for date issues and allows RAGs to be entered for both sides of the dependency relationship.

Output for Visio 2003: System generate output

This is the output which Visio will use to generate the summary plan. This is hidden and locked to protect the sheet’s ability to function.

Introducing the Visio Display

The Visio file displays the results of all calculations performed by the engine and updates the Plan on a Page when you double-click the update button.



Shape data task pane

This is a standard Visio task pane, which is very useful because it displays the SummaryPro reference number for the selected item (in this case, the "Welcome to SummaryPro" box = T1T). If this isn't displayed, click on View / Task Panes and select Shape Data.

Timescales

The three levels of timescale that you can configure within SummaryPro.

The refresh button

Double-click this to update the summary plan. This will then reach out to the matching Excel engine file (which must be closed at this point) to update the entire summary plan.

The Re-Order button

Double-click to re-order the shapes and layers on the page. You will have the option to re-order shapes within the same layer, which will undo any manual changes you have made, for instance, to bring a milestone in front of a task bar.

Key shapes

Shapes that display the Styles you have set, along with your text, to explain what each style means. Note that the related milestone shapes are also displayed. There are four standard key shapes for RAG and Complete (sometimes referred to as BRAG), the rest are entirely configurable to your needs. You can elect to display simple rectangles or the specific shapes defined by the styles.

Grey blue boxes to the left and bottom

These boxes merely conceal all unused shapes ready to be used by SummaryPro to display any future boxes, milestones, timescales etc which might be needed.

Visio stencils

Note that for SummaryPro to work you need to have the SummaryPro Shapes and Updater stencils displayed.

A detailed guide to setting up your first Summary Plan

Creating your first POAP is a simple, quick process. In this section we will look at:

1. What is the minimum data needed to make a POAP, and what data do you need to display things like RAG, Baselines, etc.?
2. How to use Auto Layout to make your first POAP with some swim-lanes.
3. How to make some changes to the auto-generated POAP to display the summary as you want.
4. How to control the colours of the bars and milestones.
5. A quick guide to setting up MSP to quickly export your data to make updating the POAP quick, easy and error-free.

1. Data needed

The minimum data needed is shown in the required column

Required	Optional	
Numeric Reference	RAG	Plan Name
Start date / time	Baseline Start date / time	Status Date
Finish date / time	Baseline Finish date / time	Major Sqimlane
Milestone (y/n)	Critical (y/n)	Minor Swim-lane
Name	% complete	

For this quick start guide, we will assume that you have the required data and which swim-lanes (Major and Minor) you want the bars and milestones to be part of.

If you have a plan in MS Project, you may want to skip ahead to the section on setting up MSP. However, to quickly get started, you can simply paste in some tasks and milestones with references to see how it all works. You can apply the numerical reference (1-300) against any task, milestone, or summary line in the plan. SummaryPro will combine any rows with the same reference into one bar.

Copy / add the data to the "Date and Bars Import" sheet in the Excel file under the correct column headings

2. Using Auto Layout

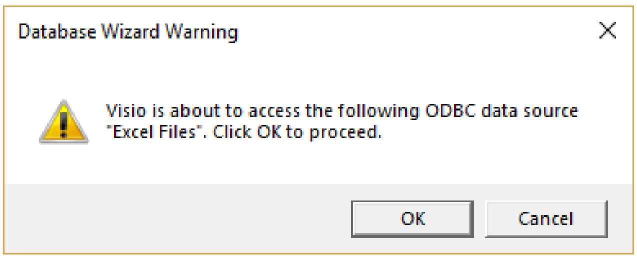
Once the data is in the "Data and Bars Import" sheet, click the "Auto Layout" button at the top. This will present you with a set of options which drive how the POAP will be laid out:

- Do you want to keep existing names and styles?
  - This allows you to keep any names and styles you have already applied to your data. In this case, we chose not to retain them as this is a new POAP. However, if you're updating a POAP, this saves any changes to the names in bars or their styles that you have previously made.
- Auto Layout - Struture. This gives you the choice to layout your POAP based on:
  - Waterfall by date - positions 1 item per line in order of start date.

    - Waterfall by ID - positions 1 item per line based on the numerical reference. This can be useful if you want the POAP to follow the order of your plan.
    - Mimimse rows used - this condenses the number of rows used as much as possible without items overlapping. Note that this often means that you will need to adjust the position of things if you want to apply labels to milestones or boxes which are too small to hold their respective text. It is, however, very useful for producing a POAP with a lot of items which will be too thin when using a waterfall layout.
- Do you want to Include Swim-lanes?
    - This allows you to use the data in the Major and Minor Swmlanes columns to organise your POAP into up to two levels of swim-lane. Note that you don't have to do this.
    - For this example, choose "Yes".
- Do you want to update the timescales in the POAP?
    - This adjusts the dates used in the timescale of the POAP to cover all the dates in the data you are importing.
    - It will also decide what units make sense for the various levels of the timescale (days, weeks, months, quarters, years).
    - As this is the first time, choose "Yes".
    - In future reports, you may not want to change the settings; for instance, you're only interested in this year, have set the timescales accordingly, and don't want to change this, so you choose "No". Note that SummaryPro will automatically exclude anything that wholly falls outside the report's timeframe from the Auto Layout.
    - You can go in and adjust the timescale settings in the "Standard Settings" sheet.

The POAP is now set up, and we can close Excel and update the POAP in Visio to see what it looks like. To do this, open the Visio file and double-click on the grey “Update” button.

The first time the update macro is run in each session, the dialogue below will display. Click OK to continue.



To check that the refresh macro is running, try selecting something else on the Visio page – if you can, the double-click wasn’t recognised; try again. If you cannot select anything, the macro is running.

When the macro is running, everything on the page will be selected and outlined in blue. When the update is complete, the report will change to show your 5 tasks and milestones, and you will be able to select things on the page again.

Congratulations, you have created your first SummaryPro Plan on a Page report.

Note that you don’t need to use Auto Layout each time you update the POAP, it is only to assist you in setting the report up in the first place.

3. Change how the POAP appears

Changing where the bars are located

The tasks and milestones are arranged in rows, so changing where a specific item appears on the POAP is simple by changing the row entry in the "Bar details" sheet, column G.

If you want to move everything up one, for instance, you would like to make a waterfall POAP occupy fewer rows (and thus allow a larger bar), you can enter the row to be removed in column AC on the "BARS DETAILS" sheet and -1 in AD. Then press the "Change Rows" button at the top of the page, and all subsequent rows will be adjusted, moving the bars and swim-lane divisions appropriately.

Note that if the row number has an amber fill, the chosen row conflicts with a swim-lane division. You can identify which swim-lane it conflicts with, as it will be similarly highlighted.

If you want to insert a blank row, use the same method but +1 rather than -1 in column AD. You will then have to enter the "missing" row number - highlighted in Red at the top of the sheet, in the "Blank Rows" section so that there aren't any gaps in the row numbers being used, which will cause an error.

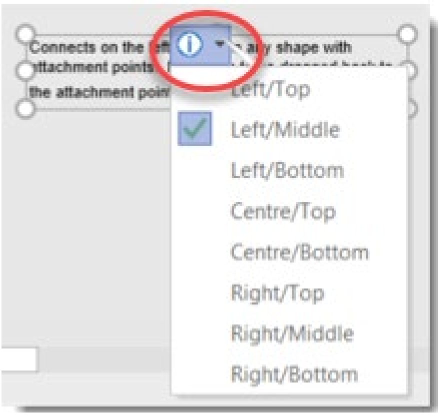
Whenever you have adjusted row numbers or removed items, you should check that there are no gaps in the rows being used by clicking the "Update Row data" button, which will display any gaps in red which can then be removed or addressed.

Change what is on the bars

Whilst the Auto Layout function will use whatever is in the plan as the bar name, you don't need to do so. To change what is displayed on a bar, simply change what is entered in column F "Bar Name)". This can be helpful when editing the text to better fit on a bar.

Adding Labels

You will need to label milestones, and you may want to label bars that are too short to hold the text you want to display. Use the "Sticky Label" shape on the "SummaryPro Shapes" stencil to do this. Drag the label onto the page, or copy an existing one and enter the desired text.



Click the "i" button at the top of the label to choose which connection point is "sticky," then drag the sticky point to connect to your milestone or bar. Note that the choice of sticky connection point drives the text formatting (horizontal and vertical), so you don't need to do this. When the connection point is "stuck," it will turn green.

Removing something from the POAP

If you don't want to display a box or milestone, remove the "y" from column D "Display?" in the "Bar Details" sheet, and remove the Row entry to avoid a blank row if there is nothing else on that row.

Once again, click the "Update Row data" button to avoid any possible errors.

4. Controlling the shapes and colours

You control the colours and shapes of the bars and milestones in the "Styles" sheet.

- A short reference in column O - this is what you will apply to each item in the "Bar Details" sheet.
- The name that will appear in the Key on the POAP.
- Choose foreground, background, line and text colours in the appropriate columns.
- The number for the chosen pattern (for an explanation of these see the Visio Patterns sheet on the Additional Files page). Note that you can’t have patterns if showing progress within

the bar. SummaryPro will automatically revert a pattern to a solid foreground colour in this instance
- Line width and type.
- Shapes for both bars and milestones.
- Any specific scaling for the width and height of milestones, which allows you to have different sizes of milestones for different styles.

Now that you have defined some styles, you can use the reference to apply them to any of the rows in the "Bar Details" sheet. Note that you can use the same styles from POAP to POAP to give consistency across your POAPs; for instance, you may choose a set of colours for your workstreams, and your audience will quickly understand which team is being referenced in the POAP.

5. Setting up MSP to export the data

This is covered in more detail later in the manual (page 48). However, at its core, you need to:

- Establish some custom fields, the minimum of which is a Number field to hold the numerical reference.
- Set up a new table that will hold the data that needs to be copied into SummaryPro.
- Define a filter which looks for the number field <>0.
- Set up a view that uses your new table and filter to display only the rows with a number in the number field and displays the table of information that needs to be copied into MSP.

Then display the number field in your standard Gantt view and go through the plan, adding numbers to the rows you want to pull into the POAP. Remember that rows with the same reference number will be combined into a single bar in the POAP.

Once this is done, save the file and display your new view. Select all the data and copy it.

Paste this data into the "Dates and Bars Import" sheet and close the Excel file, saving it as it does so.

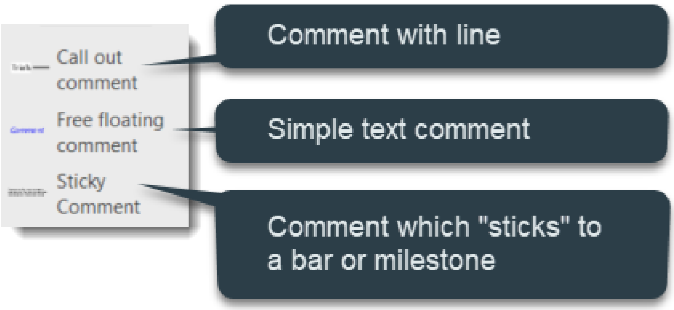
Now, the Visio is ready to be updated by double-clicking on the "Update" button.

Adding comments

A vital element of producing the summary plan that you want is to be able to add comments to:

- Label a milestone.
- Label a bar where the text you want can't fit inside the bar.
- Add a comment about a specific bar or milestone.
- Add some commentary about a section of the summary.

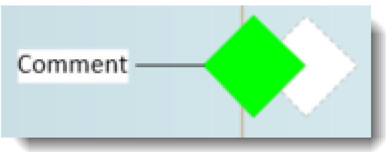
To do this, we have several different types of comments in the SummaryPro shapes stencil:



To use these, click and drag them onto the summary plan. You can change the font, text size and colours as usual in Visio, and you can also re-size the comment boxes so that they display as you want.

Call out comment

This has a text box into which you can type your comment and a line which points to the item you're commenting about.



You can use the <SHIFT> key to constrain the movement of the text box to horizontal, vertical or 45º, and the end of the line will snap to objects.

This type of comment will not move if the target bar or milestone moves however it allows more flexibility in comment placement. When the target bar moves, the line of the call-out comment will remain attached.

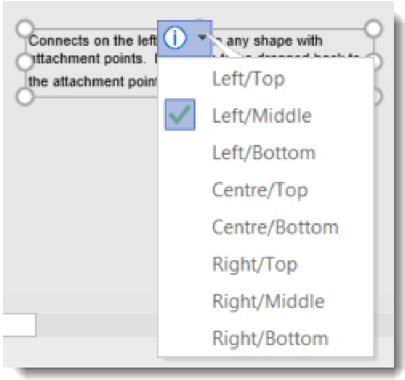
Free Floating comment

This is a simple text box.

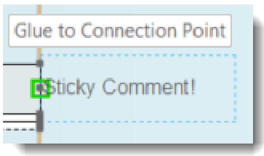
Sticky comment

The most powerful type of comment as you can "stick" it to any bar or milestone and it will move

with the "target" simplifying updating. The comment has potentially "sticky" points on all four corners and in the middle of each side. You control which one of these points is "sticky" using the "i" button in the middle. Clicking this allows you to select which of the circles in the corners and sides is the sticky one.



Now, when you drag the comment over the target bar or milestone a green square will illuminate, showing where the comment will stick:



One thing to note is that if you change the size of the box after sticking it to a target, you will need to re-stick it by simply moving backwards and forwards a little.

Practice

To practice this on your POAP:

1) Drag a Sticky comment onto the page.
2) Type some text into the label.
3) Adjust the formatting and size of the comment as you want.
4) Drag it onto the right-hand side of item one so that it sticks (notice the green square).
5) Copy and paste or select and drag whilst holding <CTRL> down to make a new comment using the same formatting as the first.
6) Change the name and stick it to something else.
7) Repeat as often as needed, experimenting with how the comment behaves when you select the various options to stick it left, right, top, bottom, etc.

Experiment with the other types of comments.

Updating an existing plan

Updating a plan when the dates have changed

Updating with new dates is quicker if you don't leave the DATES AND BARS IMPORT sheet, because SummaryPro knows that nothing else has changed and can run a faster "update" process.

1. Open the POAP you generated in the section above.
2. Change some dates in the DATES AND BARS IMPORT sheet. If you stray outside the reporting timescale the rows will go grey and you will need to change the reporting dates in the STANDARD SETTINGS sheet.
3. Close and save the Excel file.
4. Click the "update" button in the Visio file and watch the bars and milestones you changed update.

Change where something appears

Sometimes, during an update, it becomes clear that you will need to shuffle some bars around. For instance, a task has moved and now conflicts with another one or a label.

To change where a bar or milestone appears in the report, you can only change the vertical location (i.e. the row number), as the dates in the Dates and Bars import sheet set the horizontal position. You can do this in several ways:

1. Manually changing the row numbers.
2. Adding or removing rows so that the changes ripple through the POAP.

Manually changing a row number

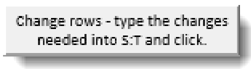
This is a simple case of editing the row number in the Visio Row column on the BAR DETAILS sheet.

When changing row numbers, it is always wise to click on the "Update row data" button (below) to identify any gaps. **Important Note**: SummaryPro will fail to display correctly if there are any gaps in the row numbers, i.e., all row numbers must be used between the minimum and max row numbers. If you want to have a blank row, please enter these under the "blank rows" section.

Adding or removing rows

Sometimes, you will want a blank row to leave space for a future edition, make room for comments, or arrange things the way you want.

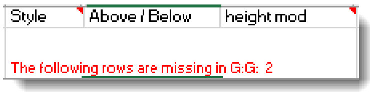
With a simple plan, adding a row is straightforward; simply change all the row numbers to make a new blank row. However, this is not so simple when the summary gets a bit more complex. SummaryPro has a handy function to help with this. This is contained under the "Rows to change" heading and is triggered by the "change rows" button.



Rows to change	
Row number	Positive numbers to add rows, negative to remove
2	1

To add a row

1. First, you need to enter the change that you want to be made in the “rows to change” area:
    - In the Row Number column, enter the row number before which the new row(s) should be added, so in this example, we are choosing to insert a row before row 2.
    - In the column next to it, enter the number of rows to be added (in this example 1).
2. Then click on the “Change rows” button. This will add 1 to every row after row 2. It will also display an error as we no longer have row 2.



3. To resolve this, either put a 2 in the Visio Row column against a blank row (especially if you will be using this for some other set of bars or milestones) or put it into the specific “blank rows” section towards the bottom of the BAR DETAILS sheet.

To remove a row

1. Use the same method; however, instead of entering the row before which the new row(s) will be added, enter the row which will be deleted and then next to this, put a negative number (-1 to remove just that row, -2 to remove to, etc.).
2. Press the “update row” button to remove the rows.
3. Now that number or rows will be removed from every row greater than the Row number you entered.

Using the Auto Row button

The methods above give you full control of the process of adding and removing rows. Sometimes, all you want to do is check for missing rows and resolve the issue if there are any. In this case, using the

new Auto Row functionality is faster. Click on the Auto Row button, and SummaryPro will identify any gaps in the row numbering and remove them.

Safety tip

These changes can’t be undone because they are made with a macro; it is sensible to guard against accidentally triggering a change. To do this, put any Row number in the Row Number column and put a 0 in the rows to be added / removed, or remove all references to any rows. In this way, if the macro is accidentally triggered by pressing the “update row” button, no change is made to the report.

Outputting the summary

Once you have your plan on a page, you can output it in several ways:

- Save as an image or PDF (or any other format supported by Visio).
- Print it.
- Copy and paste it.

Note that if a shape is on a Visio layer that is set not to print, it will not be displayed in any output.

Save as a file

If saving as a PDF, all you have to do is File / Save as... / choose PDF from the File Type drop-down. This will effectively print the image to the PDF file, meaning that only the elements which are on the “paper” will be saved, meaning that all the grey boxes around the displayed page will not be saved.

This is not the case when saving as an image file, so before the Save As... action, you must select the elements you want to be part of the picture. Generally, this means clicking on one corner of the page and dragging to the other side to select the page. Then save this as an image file. Note that .png is a lossless format compared to .jpg.

Printing

Printing is simply file / print and choosing the size of paper to print onto. Note that you can work at a 1:1 scale by setting the pages size in STANDARD SETTINGS to match the size of paper you want. This paper size should also be set in Visio so that everything is "on the page" within Visio.

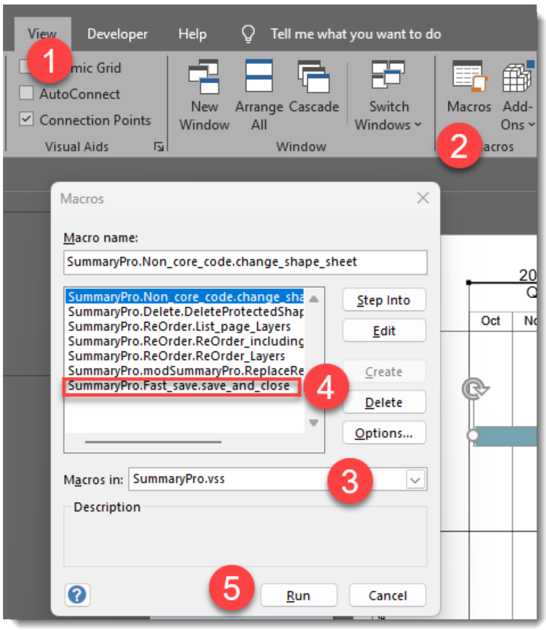
Copy and paste

Select the items that you want to copy and <CTRL><C> (or your preferred method of copying) and then <CTRL><V> to paste into your chosen location. A couple of tips:

- The best result when pasting into PowerPoint tends to come from selecting one of the standard text / picture zones on the presentation and pasting into that rather than just dropping it on the slide. In this way the settings in your PowerPoint template control the size etc of the image.
- If you have set elements of the Plan on a Page to have no background (I.e. 0 in the pattern settings on the STYLES sheet these will be transparent when pasted.

Rapidly save the report as a PDF and Image file

Built into the Visio report is a macro which saves the updated report as a PDF and a PNG file and closes the Visio file. This helps speed up the save-and-exit process. To use this:



- Select the contents of the page (as needed when saving as an image file above)
- Access the macros by clicking on View / Macros
- In the "Macros in" drop-down, select SummaryPro.vss to display all the macros.
- Click on SummaryPro.Fast_save.save_and_close
- Click on Run (or double click the macro name) SummaryPro will save a PDF and PNG file with the same name as the Visio file, overwriting any previous copies, and close the Visio file.

Using another report as a template

As SummaryPro is based around a pair of files for each report, it is very simple to use one report as a template for another report. This allows the same colours, sizes etc. to be used giving a uniform look and feel across several summary plans.

Simply copy an existing pair and rename the files. This is easily done by:

1. Copy both the Excel and Visio files (right mouse or <CTRL><C> followed by <CTRL><V>.
2. Whilst both are selected press <F2>.
3. Type in the new name and hit <Return>.

This copies the pair of files and renames them with matching names. This final set is very important as the Visio updating macro looks for a file of the same name.

Change the imported data and contents of the BAR DETAILS sheet and your new report will replicate the original / template report.

Changing the appearance (Styles) of bars and milestones

Changing the bar height

At the top of the STANDARD SETTINGS sheet the "Bar Sizes" section controls the sizes of bars as well as the gaps between the swim-lanes.

Bar Sizes

Main Bar Height	12	mm
Progress / RAG bar height	2	mm
Baseline bar height	4	mm
Overlay bar	2	mm
Major space	0	mm
Minor space	2	mm

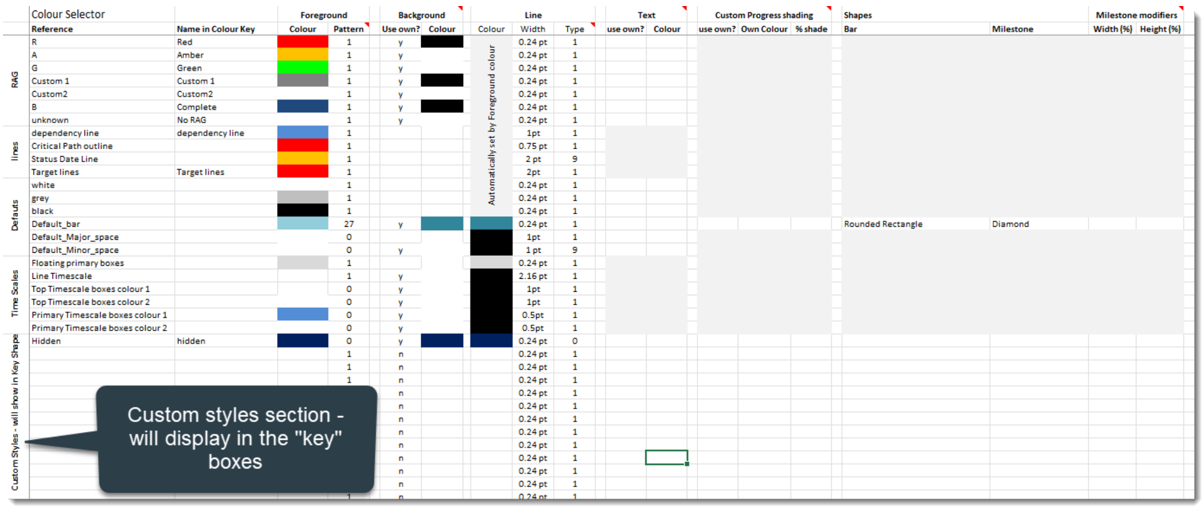
Changing the Font

Control of text font and size (in all cases) is handled in Visio – simply select the items and use the controls on the home / font ribbon as normal.

Adding colours and changing shapes using styles

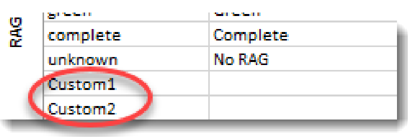
Defining STYLES

The STYLES sheet sets the shape and colours of bars, milestones and timescales. Setting up a named style enables you to apply this to bars and milestones in the BAR DETAILS sheet.



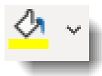
In the same location, the colour settings for timescales, RAG etc are also set. Note that SummaryPro provides two additional custom RAG settings.

When using these, ensure an exact match between the custom RAG name and the one used in the source data.



The STYLES sheet is also used to define how non-bar items (timescales, status line, RAG etc) will look and they are automatically applied to all relevant items.

For an explanation of the columns on the style sheet, see the table below.

Column		Use	Comment
Reference		Name that is used to apply the style.	This is only seen by you so it is useful to make it short. If each style has a different first letter it will auto fill after the 1st application in BAR DETAILS.
Name in Colour Key		Text that will display in the Key.	This is the “public” name which will show in the key shape which you can use to build the key to the Plan on a Page.
Foreground	Pick	Choose the fill colour using the “fill” function in Excel. 	You can either select from the standard set or, by choosing “more colours” enter the RGB value for a more exact match.
	Pattern	Number corresponding to the fill pattern you want to use.	See the “Fill patterns in SummaryPro.png” file for the full range of patterns supported. The most common are: 0 = No fill. 1 = Solid fill. 27 = Horizontal gradient. Note that if you elect to display progress within the bar, the pattern will automatically be set to 1, overriding any choice here.
Background	Use Own?	Enter Y if you want to choose the background colour.	If you leave blank or enter N, SummaryPro will select the colour which is the opposite of your chosen foreground colour. You will need to choose the background colour if using a patterned fill.
	Colour	Choose the colour using the “fill” function in excel.	As above.
Line	Colour	Choose the line colour.	Again using the fill function.
	Width	Enter the width of the line in “pt”.	Needs pt at the end. Note it is possible to enter a figure in mm – this will be converted to pt by Visio.

Column		Use	Comment
	Type	Enter 1-23 as a pattern for the line.	See Visio for the full range however the most common choices are: 0 – No line. 1 – Solid line. 9 – Dotted line.
Text	Use own?	Enter Y if you want to choose the text colour	If you leave blank or enter N, SummaryPro will selecteither black of white depending on your chosen foreground colour.
	Colour	Choose the colour using the “fill” function in Excel	If you have selected “y” in “use your own?” you need to pick the text colour using the Excel fill tool.
Custom Progress shading	Use own?	Enter Y if you want to control the colour used to show progress	If you select N or leave blank, SummaryPro will use the settings on the Standard Settings sheet.
	Own colopur	Select the colour for progress.	
	% shade	Change the standard shading setting	You can vary the standard tint/shading, set in STANDARD SETTINGS for a specific style.
Shapes	Bar	Set the bar shape	Choose the shape of the task bars for this style. If left blank, the shape of the “default bar” will be used.
	Milestone	Set the milestone shape	Choose the shape of the milestones for this style. If left blank, the shape of the “default bar” will be used.
	Width (%)	Change the width of milestones	You can vary the default scaling of milestones so that you can have different sizes for different styles, compared with the standard settings on the Shapes sheet.
	Height (%)	Change the height of milestones	

Applying Styles

Once a style is defined it can be applied to any given milestone, bar or swim-lane in the Bar Details sheet by typing its name into the Style column.

What isn’t handled in the Excel file

The following formatting elements are adjusted in the Visio element of the Plan on a Page rather than in the Excel engine:

- Transparency.
- Font (style, size, bold etc).
- Which shape is “in front” of another – usually because a milestone is being obscured by a bar or another milestone.
- Formatting of labels and comments.

Note that if you change the fill colour of a bar in Visio, the next time the summary plan is updated, this change will be overwritten by the settings in the Excel engine.

How to stop a bar or milestone from displaying

If you don't want a bar or milestone to display, you can either:

- Remove the SummaryPro reference from the source data.
- Remove the "y" from the relevant line in the BAR DETAILS sheet.

The latter method is useful when you don't want to amend the source data and might want to display the bar or milestone later.

Note that if you want an invisible milestone, for instance, to attach another image to, you can hide items with a "hidden" style, which has line and pattern set to 0. Or you can use one of the provided attachment points, see Adding attachment points and why (references 2000-2025) p33.

What do the colours on the Bar Details sheet mean?

Within the BAR DETAILS sheets various conditional formats are set up to help you spot issues:

Location	Colour	Meaning	Action required
Display?	Red	You have a "y" against a Summary Reference which doesn't exist in the updated data set.	Remove the "y" highlighted. Check your data set copied into DATES AND BARS IMPORT if you were expecting to see that reference. Press the update button if the data is present.
Display?	Amber	You don't have a "y" against a reference which is included in your imported data set.	If this is intentional, do nothing. Add a "y" into the amber box. If you know that the data isn't present press the update button on the DATES AND BARS IMPORT sheet.
Display?	Grey	Start and/or finish is outside the timescales of the report	Check the dates for the report.
Visio Row	Amber	There is a bar or MS shown on the same row as a swim-lane.	Adjust your swim-lane or bar to avoid a clash. Note that this is acceptable when the "clash" is between a minor and major swim-lane.
	Red	"y" in display but no row.	The requested bar/MS will not display
Visio Row in the dividers section	Amber	You have two swim-lane rows next to each other.	This will cause a critical failure, resulting in SummaryPro not displaying the summary plan correctly. If you need two swim-lanes next to each other with no bars or milestones between them add a blank line.
	Red	You have two swimlanes with the same row number	Again a critical failure. You can have a major and minor swimlane with the same row but not a duplicate pair.
Notes or MS Name	Red in the dividers section	No name was allocated to a "major space".	The top-level swim-lane should have a name to be displayed on the Plan on a Page. If you don't need one, place a single space in this cell.
Style	Red Text	The style name is not recognised.	Check the spelling matches that shown in the Reference column on the STYLES sheet. Set up the desired style on the STYLES sheet.

Changing the shapes of bars and milestones

Setting the shape for a style

Choose the desired shapes for Bars and Milestones from the drop-down lists on the Styles sheet. Note that if no selection is made, the settings from the “default bar” line will be used.

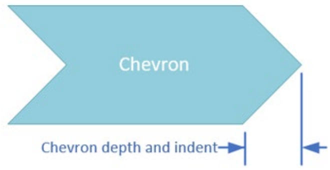
Controlling shape variables

In the SHAPES sheet, you control aspects of each shape, for instance, the rounding of rectangles or the size of the indent/point on a chevron or the standard size of a milestone shape.

Shape details

Type	Name	Variable	Variable value	Unit
Bars	Rectangle	NA	NA	
	Rounded Rectangle	Corner Rounding/Cuts	3	mm
	Corners Cut Rectangle		3	mm
	Left rounded rectangle		3	mm
	Right rounded rectangle		3	mm
	Corner Cut Rectangle - left		3	mm
	Corner Cut Rectangle - right		3	mm
	Lozenge	NA	NA	
	Pointed Lozenge		NA	
	Arrow	Indent	5	mm
	Chevron		5	mm
	Rounded Arrow		5	mm
	Rounded Chevron		5	mm
	Tab - Curved	Corner Rounding/Cuts	3	mm
	Tab - Cut		3	mm
			Width	Height
Milestones	Diamond	Scale vs normal bar height	100%	100%
	Circle		100%	100%
	Triangle - up		100%	100%
	Triangle - down		100%	100%
	Twin triangle		100%	100%
	Star	Will always scale evenly	NA	100%
	Lollipop - up		NA	100%
	Lollipop - down		NA	100%
	Pendent - right - up	Scale vs normal bar height	100%	100%
	Pendend - right - down		100%	100%
	Pendent - left - up		100%	100%
	Pendend - left - down		100%	100%
	Flag - right - up		100%	100%
	Flag - right - down		100%	100%
	Flag - left - up		100%	100%
	Flag - left - down		100%	100%
	Map Pin - up		100%	100%
	Map pin - down		100%	100%

Clicking on the shape name will display a picture showing the variable that you can control, e.g, for the chevron:



Some shapes, such as the lozenge, have limitations on what you can change.

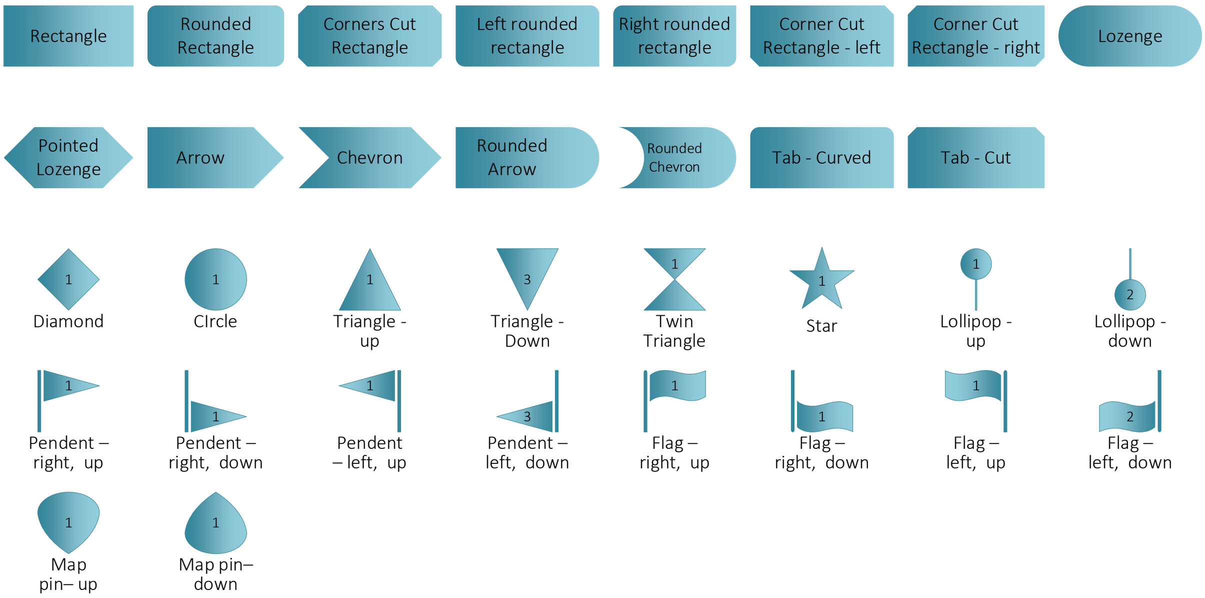
If a variable is too large for the bar height, it will be automatically reduced to a suitable size, with a warning message displayed alongside the variable setting.

Setting specific width and height parameters for milestones in the Style sheet

Bar shape settings can’t be varied between styles, so all your chevrons will have the same indent. Milestone sizes can be varied by style. However, if no specific variable is applied in the style sheet, the settings on the SHAPES sheet will be used.

If you want a specific style to have milestones with different dimensions from the standard settings, for instance, slimmer triangles, you can change the standard width settings from the SHAPES sheet in the “milestone modifiers” columns on the STYLES sheet.

Shape Choices



Changing what is displayed on the key

The “Key” shapes can display the shapes set in the Style sheet for the bars and milestones or they can be simple rectangles. Select your choice on the STANDARD SETTINGS sheet.

Key Shapes

Shape for Bars	Style
Shape for Milestones	Style

Changing what bars display

You can change what colours task-bars display in terms of:

- Their outline and the fill colour.
- What happens when the task is completed.

Task bars

What to show in bar fill	Style
Bar line colour	RAG
When bar is complete fill colour	Do not change

What to show in bar Fill

- White – a simple plain white fill.
- RAG – The colour associated with the Red, Amber, Green or Complete RAG which is driven by the data imported for that milestone. If no RAG the fill will be white.
- Style – The fill colour is driven by the style assigned to the shape in the BAR DETAILS sheet. If no style is assigned the fill colour will be white.

Bar line colour

- Black – a simple black line.
- RAG – As for Fill.
- Style – As for Fill.

When bar is complete fill colour

If the milestone is complete you can choose to override the choice above and display the colour associated with “complete” by selecting “complete”. If you select “do not change” this will not happen.

Changing what milestones display

You can change what colours milestones display in terms of:

- Their outline and the fill colour.
- What text is displayed.
- What happens when the milestone is completed.

You also have control over how baseline milestones are displayed however this is covered in the baseline section of the manual (“Displaying % complete” on page 28).

Milestones

What to show in milestone fill	Style	
Milestone line colour	Style	
When milestone is complete fill colour	complete	
Show dates in milestones?	y	Displays the day element of the date in the milestone

What to show in Milestone Fill

- White – a simple plain white fill.
- RAG – The colour associated with the Red, Amber, Green or Complete RAG which is driven by the data imported for that milestone. If no RAG the fill will be white.
- Style – The fill colour is driven by the style assigned to the shape in the BAR DETAILS sheet. If no style is assigned the fill colour will be white.

Milestone line colour

- Black – a simple black line.
- RAG – As for Fill.
- Style – As for Fill.

When milestone is complete fill colour

If the milestone is complete you can choose to override the choice above and display the colour associated with “complete” by selecting “complete”. If you select “do not change” this will not happen.

Show dates in the milestones?

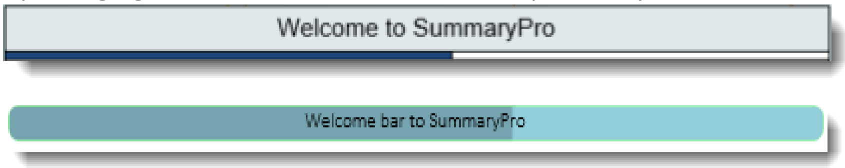
If “y” the day 2 of the date for the milestone will be displayed inside the milestone. If “n” it will display the contents of the “name” field set in the BAR DETAILS sheet. Normally this is blank however it can be useful to have a short reference to a key when producing dense milestone charts. Unless the bar height is significant it is recommended that such references are kept to 1-2 characters.

Baseline, RAG and Progress bars

Displaying % complete

SummaryPro can display progress information from your source data, using the "% complete" column in the DATA AND BARS IMPORT sheet.

This is displayed either on a bar below the planned date bar or as a shaded bar within the task bar or by changing the colour of milestones to completed if you have selected this option on the STANDARD SETTINGS sheet (see When milestone is complete fill colour p27). The size of the progress bar (which can also be used to display RAG – see below) is set at the top of the STANDARD SETTINGS sheet in the "Bar Sizes" section.



Set how progress is shown on bars

On the STANDARD SETTINGS sheet, select how you want to display progress in the progress section.

Progress

Display progress	Shading within task bar
Shade / Tint %	20%

Select "Shading within task bar" for progress within the bar, "Bar under" or "Don't display". Note that to display progress as a bar under the task bar you need to select "Bar under" here and select "n" against the option "Hide rag/ progress bars" in STANDARD SETTINGS within the "Display Options" section.

Display options

Show de-bug ref?	n	Displays the Visio References in the shapes
Show % complete Figures?	n	Displays the % complete in the progress bars - ususally not shown as gets too busy
Show critical path?	n	Colours critical path items with Red borders - set thickness below
Hide rag / progress bars	n	removes the RAG / baseline bar - used when showing rounded main boxes.
Hide baseline?	n	Simplifies the picture. If "y" the RAG/Progress lines show the current dates and the Text bar shows the baseline values

You can also elect to turn the bar fill to the standard progress colour by selecting "complete" in the "When bar is complete fill colour" under task bars in the STANDARD SETTINGS sheet.

Set how proges is shown on milestones

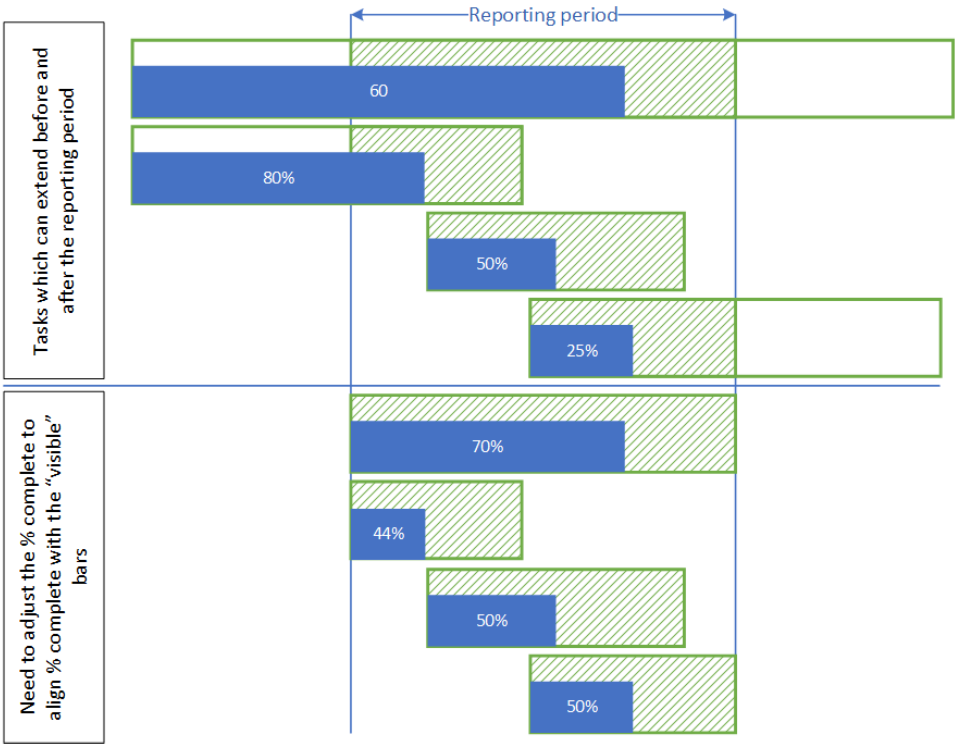
Milestones can only be 0% or 100% complete and so can't displaya progress in the same way as task bars. To control how progress is displayed select either "do not change" to continue to dsiplay the style or RAG or "complete" to show the completion colour in the fill.

Milestones

What to show in milestone fill	Style
Milestone line colour	Style
When milestone is complete fill colour	Do not change
Show dates in milestones?	y

What happens with tasks which fall outside the report

If a bar starts before, or ends after, the time period shown in the Plan on a Page SummaryPro adjusts the length of progress bar so that it correctly represents the level of progress.



Thus if half the task is before the summary starts and is 60% complete only 10% of the displayed task will be marked as complete to correctly report the progress. SummaryPro will automatically adjust this if the reported timescale is changed.

If you should want to display the actual % complete figure in the bar you can do so by selecting "y" against the appropriate option. This will only display with the "bar below" option.

Display options

Show de-bug ref?	n	Displays the Visio References in the shapes
Show % complete Figures?	n	Displays the % complete in the progress bars - usually not shown as gets too busy
Show critical path?	n	Colours critical path items with Red borders - set thickness below
Hide rag / progress bars	n	removes the RAG / baseline bar - used when showing rounded main boxes.
Hide baseline?	n	Simplifies the picture. If "y" the RAG/Progress lines show the current dates and the Text bar shows the baseline values

Adding RAG bars

If your source data contains RAG for bars or milestones (Red, Amber, Green, Complete etc), this can be displayed on bars using the same settings as the Progress Bars.

Note you can also show RAG in the fill or line of the task bar. This is useful if you have elected to show progress as shading in the bar and reduces visual clutter.

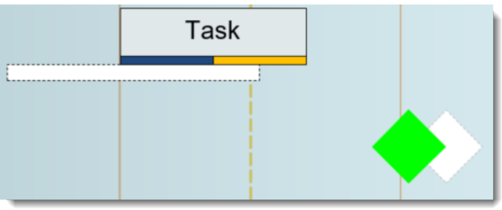
Display options

Show de-bug ref?	n	Displays the Visio References in the shapes
Show % complete Figures?	n	Displays the % complete in the progress bars - usually not shown as gets too busy
Show critical path?	n	Colours critical path items with Red borders - set thickness below
Hide rag / progress bars	n	removes the RAG / baseline bar - used when showing rounded main boxes.
Hide baseline?	n	Simplifies the picture. If "y" the RAG/Progress lines show the current dates and the Text bar shows the baseline values

The display of RAG on milestones is controlled using the options in the Milestones section (see What to show in Milestone Fill p27).

Displaying the baseline

You can choose to display the baseline information for both bars and milestones.



To display this, select “n” against the option to “hide baseline?” in the “Display Options” section within STANDARD SETTINGS.

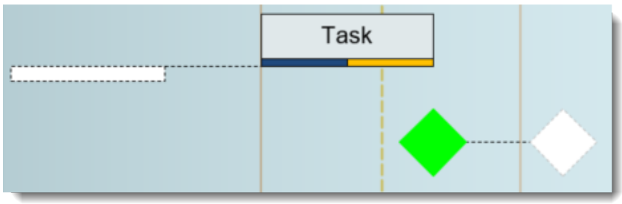
Display options

Show de-bug ref?	n	Displays the Visio References in the shapes
Show % complete Figures?	n	Displays the % complete in the progress bars - ususally not shown as gets too busy
Show critical path?	n	Colours critical path items with Red borders - set thickness below
Hide rag / progress bars	n	removes the RAG / baseline bar - used when showing rounded main boxes.
Hide baseline?	n	Simplifies the picture. If "y" the RAG/Progress lines show the current dates and the Text bar shows the baseline values

When displaying the baseline any items in the imported data which don’t have milestones will display with the baseline dates equal to the planned dates.

The “Baseline Bar Settings” section within the STANDARD SETTINGS sheet allows you to:

- Define how baseline milestones will look in terms of their outline and fill.
- Define how baseline bars will look; again, line and fill.
- If lines should connect baseline items to their matching planned dates when the baseline bar / milestone is no longer in physical contact as shown in the illustration below.



Formatting choices for the display of the baseline are mainly contained in the section “Baseline Bar Settings” within the STANDARD SETTINGS sheet. The only exception to this is the height of the baseline bars which is set at the top of the STANDARD. SETTINGS sheet:

Baseline Bar Settings

Milestones:		
Dotted baseline milestones?	y	
Baseline Milestone Line	grey	
Baseline milestone Fill	grey	
Hide dates (if shown in main milestones)?	n	
Text Colour	Colour code	
Baseline bars		
Dotted baseline bars?	y	
Basline Bar Line	grey	
Baseline Bar Fill	grey	
Line linking basline to plan (if required)		
Show at all?	y	
Dotted?	y	
Colour	black	
width	0.24	pt

Bar Sizes

Main Bar Height	12	mm
Progress / RAG bar height	2	mm
Baseline bar height	4	mm
Overlay bar	2	mm
Major space	0	mm
Minor space	2	mm

Hide RAG, Progress and / or baseline

Hiding both the RAG and Progress bar is simply entering “y” against the option “Hide RAG/progress bars”. To hide the baseline, simply select “y” against the option “hide baseline?”.

Adding other elements

Adding blank rows

Sometimes, it is useful to have a blank space between rows of boxes or milestones for instance:

- To improve the aesthetics of a summary plan.
- To leave space for future data.
- To make space for comments or labels.

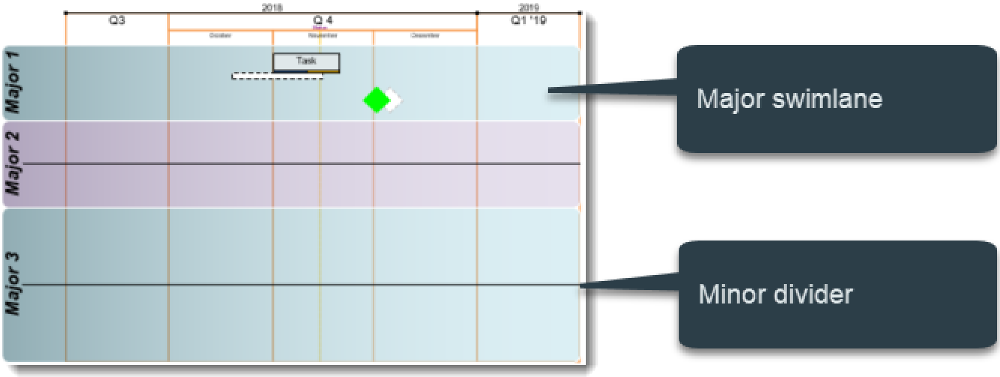
To add a blank row enter the desired row number in the “Visio Row” column without entering “y” in the Display column. There is a “blank rows” section on the BAR DETAILS sheet to allow such rows to be organised however this technique will work in any of the data sections.

For details on how to easily add rows, see the “Adding or removing rows” section on page 15.

Adding swim lanes

There are two types of divisions which are used to make swim-lanes:

- Major: These display as a box which stretch from the designated row till the next Major division (or bottom of the sheet). Fill as well as line formatting is set in the STYLES sheet.
- Minor: These display as a line on the designated row. The formatting of this line is set in the Style sheet using the “Default_Minor_Space” row. All minor dividers share this formatting.

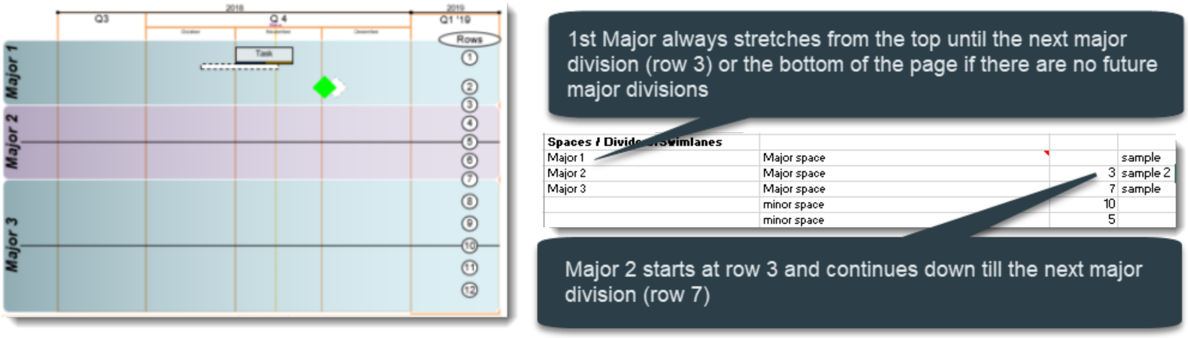


These divisions are defined in the “Spaces / Dividers / Swim-lanes” section on the BAR DETAILS sheet:

- Choose the type of divider in column F.
- Enter the row number in the Visio Row column.
- Enter the style for Major dividers in the Style Column.
- Enter the name to be displayed in column E, note that if no name is needed for a Major division simply enter a single space to remove the red flag which displays for a blank entry.

The Visio Row entry governs the position of the swim-lane dividers.

- Minor dividers are simply displayed at the designated row, for instance the example below has minor dividers at rows 5 and 10.
- Major divisions’ effectively the gaps between major swim-lanes, are a little more complex – these run from the designated row to the next major divider down the page, or the bottom of the page if there are no further major dividers. This is illustrated in the picture below.

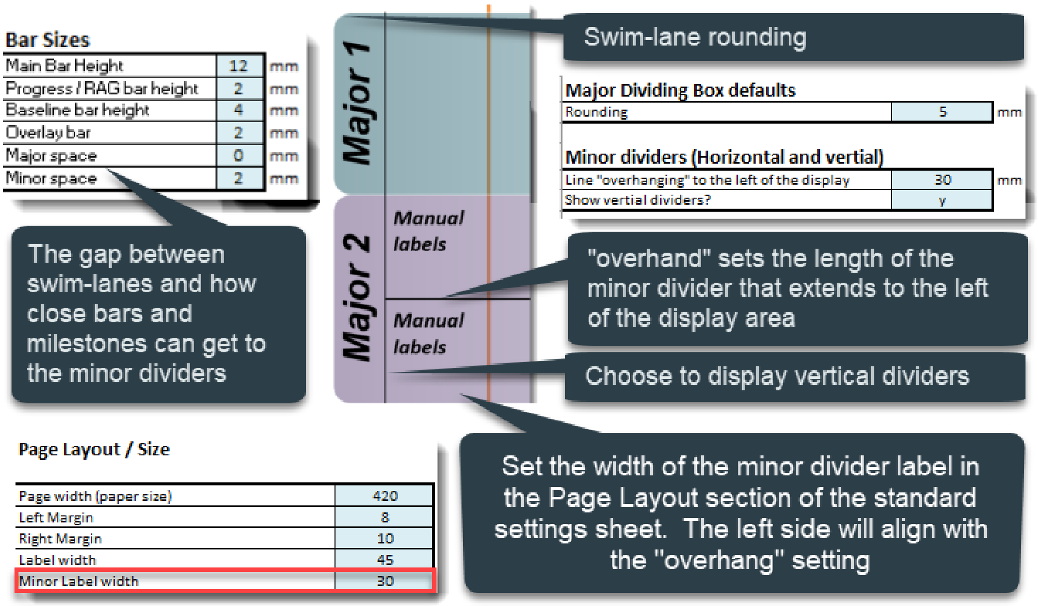


The labels for the minor divisions operate in the same way as the major divisions; they span the space between the named row and the next division (major or minor). This means that when you need to label the space from the top of a major division to the first minor you need to place a "dummy" minor division in line with the major division or row 0 if the division is at the top of the page. Thus if there is a Major division at row 5 and a minor division at row 7 you need to have:

Spaces / Dividers/Swimlanes		
1st major	Major space	
2nd Major	Major space	5
Division 2.1	minor space	5
Division 2.2	minor space	7

If the minor division is at the top of the page the "dummy" division will be at row 0. Note that you can also label swim-lane using labels, however these will not move if the dimensions change. The width of the minor divider label is set in the Page Layout section of the STANDARD SETTINGS sheet.

An additional feature which SummaryPro provides is to insert vertical lines separating the minor and major labels as shown below. The dimensions of the dividers are controlled on the SETTINGS sheet.



The font details for the swim-lane labels are set in Visio. If you find that the name is too long or you want to display it horizontally simply set the name in the BAR DETAILS sheet to a single space and then use a manual label to name the swim-lane.

SummaryPro will not function correctly if dividers are positioned in adjacent rows or in conflict with bars and milestones. To help avoid this situation, the following coloured error flags are provided:

- Row numbers turn red: Two dividers are next to each other. This is a critical issue that will prevent the summary plan from displaying correctly.
- Row numbers turn amber: The row is assigned to a divider and a data row, which will position a bar or milestone on the divider that looks wrong.

Tip:
When using the Auto Layout function and adding swim lanes, if the default alphabetical layout isn't what you need, you can add numbers to the front of the minor and major divisions in the input data to force the desired order. When you are happy with the layout, simply edit the division names to remove the numbers.

Using Containers to give an additional layer of organisation

Why use containers
SummaryPro now includes a new Container feature, which lets you visually group multiple tasks and milestones into a single enclosing shape.   This means you can visually show a 3rd order of grouping on top of the existing 2 swim lane levels, for example, separating phases of a project or projects within a portfolio.

Containers offer independent control over the fill and outline of the grouping shape, separate from standard bar and milestone styling.

How to use them
To designate a shape as a Container, put "y" in the "Container?" column on the BAR DETAILS sheet. .

Container options

Container settings

What to show in Fill	Style
What to show in Line	Style
Show Basline?	n
Show Progress?	n

What containers show is controlled by the "Containers Settings" section in the STANDARD SETTINGS sheet.

Adding attachment points and why (references 2000-2025)

SummaryPro provides hidden attachment points which can be associated with any single date in the source data by assigning a reference of 2000-2025. These attachment points are 1mm circles, which can be made visible or invisible in the STANDARD SETTINGS sheet:

Attachment points - used to "attach" brainstorm icons to dates on the summary

Show? (make lines and fill visible)	y	Set to "y" to see the attachment points for initial layout and then "n" to hide

These are used in conjunction with the sticky symbols or images in effect to call attention to a specific date, for instance a deadline could be shown by an exclamation mark or warning sign whereas the final delivery of a project could be shown with the chequered flags rather than a "normal" milestones.

To use this feature simply:

- Tag a date in the source data with a reference between 2000 and 2050.

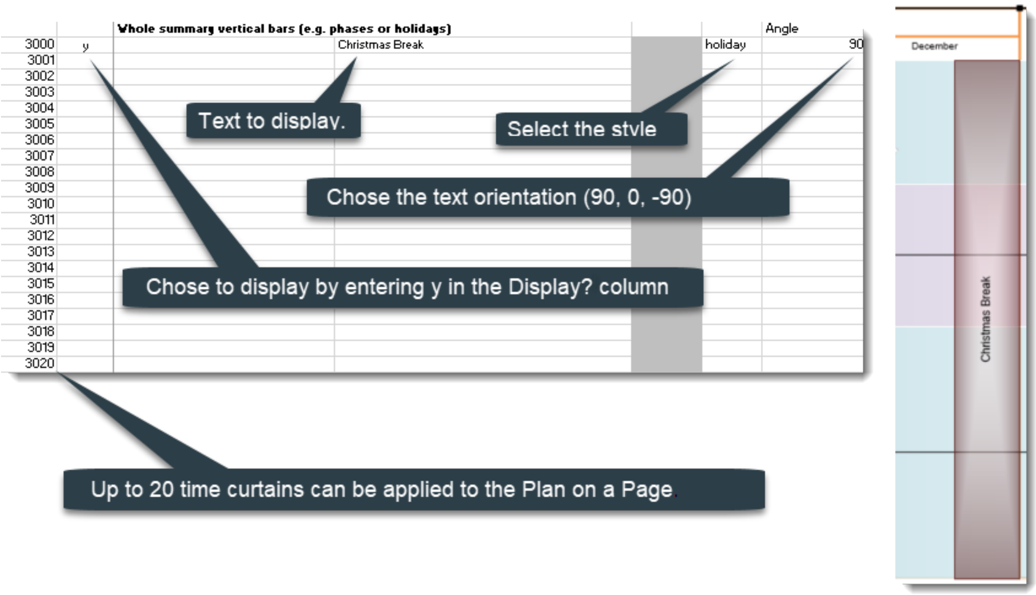
- Display the Attachment points.
- Set which row the Attachment Point should display on.
- Link your chosen symbol to the attachment point and, if desired, a sticky comment to the symbol and then.
- Make the attachment points invisible.

Now your symbol and text will move if the date changes in the source date or you change the timescale settings. An alternative to using the attachment points is to have a milestone which is formatted with a style which has no line or fill. You can change the style so that it is visible to be able to attach things and then modify the style to no line and fill. You can attach any icon or image to an attachment point or milestone – see the blog article "how to replace a milestone with an image or shape of your choice".

Adding time curtains (references 3000-3020)

SummaryPro allows you to add "curtains" of time which stretch from top to bottom of the display area showing specific periods of time (for instance holiday periods or system shutdowns).

A data period is selected by assigning a Reference from 3000-3020 (up to 20 curtains can be displayed on the summary plan) in the source data entered on the Dates and Bars Import sheet.



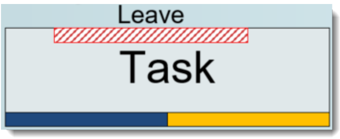
The orientation of the text on the time curtain is set in the angle column on the BAR DETAILS sheet:

- 90 = vertical facing right.
- 0 = horizontal.
- -90 = vertical facing left.

The appearance of the time curtain is set by a custom style on the Style sheet.

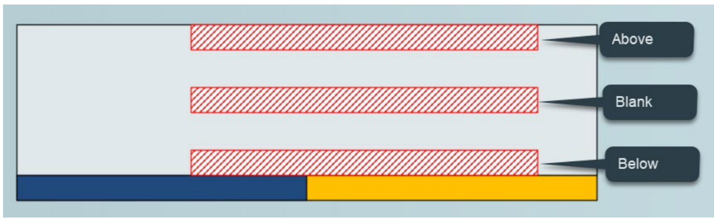
Adding overlay tasks (references 4000-4050)

Overlay tasks appear over the top of any other tasks. They are a special class which doesn't have a baseline or the ability to display as milestones. As such they are designed to show periods of time which will impact a specific task or row in a summary plan.



Notice that the text is designed to sit above the Overlay Task and is governed by the length of the task, if this is insufficient set the display text to a space and use a Sticky Comment.

Overlay tasks can be positioned at the top or bottom of a row by entering “above” and “below” respectively in the Above/Below column (J). If this is left blank the Overlay task will be displayed in the middle.



Adding Symbols

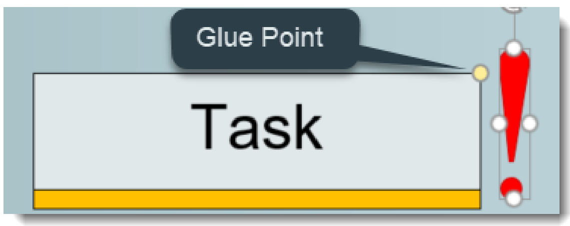
Various symbols are available in the SummaryPro Shapes stencil which can be dragged onto the Plan on a Page to draw attention to items.

Except for the “Call out comment” and “Free floating comment” shapes all these shapes can be attached to bars and milestones and move with that shape.

The behaviour of these as well as the “sticky comment” has been covered in Adding comments on p13 .

As with all the other comment shapes this comment is on the “comments” layer in Visio allowing all comments to be selected as one which can be very useful when removing all comments having used an existing Plan on a Page as a template.

The remaining shapes can be glued to any shape and move with that shape maintaining their position relative to that shape. When the shape, for example an exclamation mark is dragged onto the Summary Plan a small yellow dot can be glued to any other shape.

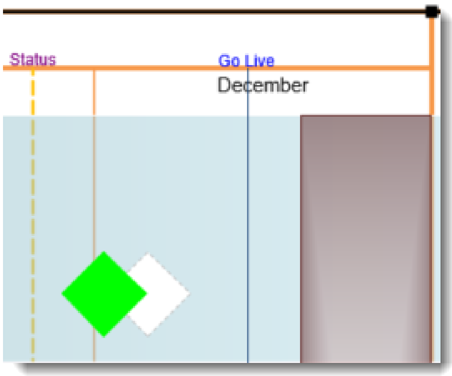


This glues the Exclamation Mark to that shape and means that the mark will move with the shape. This is very useful as the only other way to link shapes (Grouping) prevents changes to the grouped shapes.

Adding the Status line and target lines

SummaryPro provides three lines which drop from the timescales to the bottom of the page:

- A status line showing the date at which the plan was updated.
- Two target lines which are used to show critical dates which apply across the plan, for instance go live dates.



The Status line date is set by the latest date in the "status date for Visio" column in the DATA AND BARS IMPORT sheet. Typically this is provided by the source plan.

The Target line dates are entered in the STANDARD SETTINGS sheet. Note that if no date is entered the line will not be displayed.

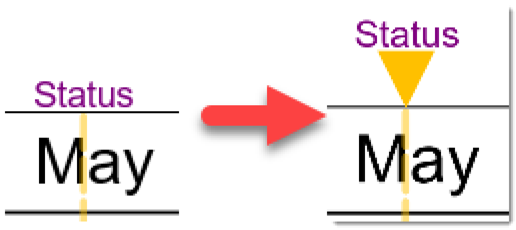
You can choose to show any or none of these lines in the STANDARD SETTINGS sheet, the text to be displayed is also set in this sheet.

Drop Lines / Target dates

1st Target Line	Date	15-12-18	note: if blank the line will not display
	Name	Go Live	
2nd Target Line	Date		note: if blank the line will not display
	Name		
Today / Status line	Show?	y	
	Name	Status	

Highlighting the status line

As it stands, the status line is reasonably subtle, if you want to draw more attention to it, or the other two target lines, you can add a shape to the top and/or bottom and adjust where the text is displayed. This [blog post](#) gives more detailed instructions.



Page settings

It is easy to change the size of the displayed Plan on a Page using the "Page layout / size" section on the STANDARD SETTINGS sheet. This section allows you to control not only the actual size of the summary plan but where it appears on the page. This latter capability is useful when you want to have a footer below the plan on a page as with the example report that comes with the initial installation of SummaryPro. Note there is a new ability to place a gap between the minor swim-lane label and the main display area .

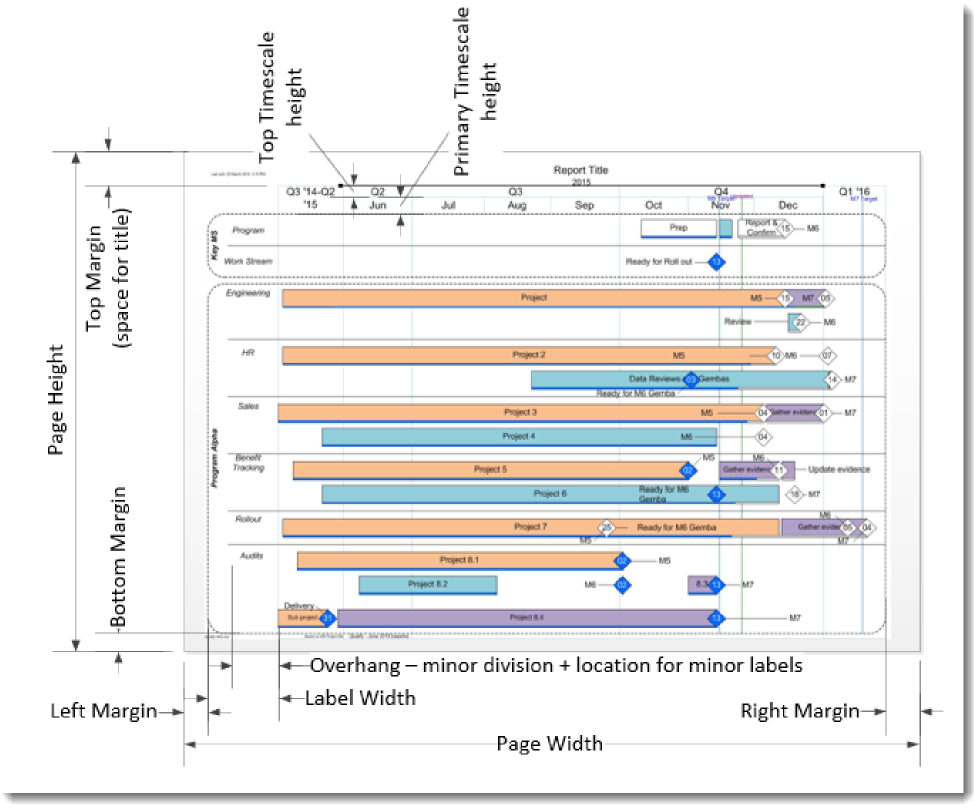
These settings control the size of the report; however, they don't control the size of the paper used by Visio – this is set in the normal way within Visio using the Design / size menu options. The combination of these settings allows you to work at 1-1 scale with all sizes of paper, including up to A0 or larger.

Page Layout / Size

NOTE: never cut values, always copy and paste

Optional: gap between minor label and chart	0	mm
Page width (paper size)	420	mm
Left Margin	10	mm
Right Margin	10	mm
Label width	65	mm
Minor Label width	50	mm
Page height (top of the paper)	297	mm
Bottom Margin (bottom of the display area)	30	mm
Height of Top timescale labels	15	mm
length/height of Primary timescale marks	10	mm
Top Margin (Space for Title)	25	mm

The page layout / size settings control the size of the display area as well as the spaces for timescales and borders:

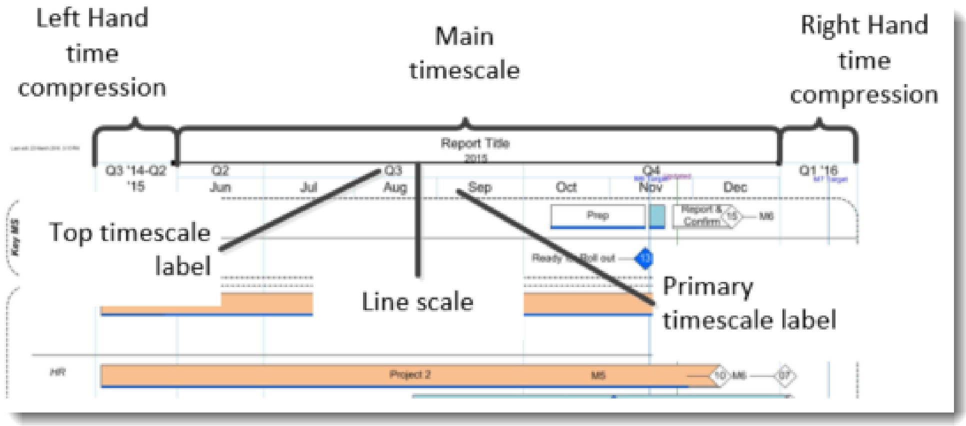


Timescales

The available timescales.

SummaryPro contains three layers of timescale:

- Line – 12 divisions, which can display months, quarters, or years.
- Top – 47 divisions, which can display hours, days, weeks, months, quarters or years.
- Primary – 204 divisions, which can display hours, days, weeks, months, quarters or years.



You can also compress the timescales to the left and right, show or hide weekends, choose which day the weekend starts, and set the working hours.

What happens when tasks fall outside the report

If a task's dates fall entirely outside the date range of the report (e.g. it finishes before the report's start date) the task or milestone will not be displayed. This can be seen in the DATA AND BAR IMPORT sheet as the row will be grey as will the "display" cell on the BAR DETAILS sheet for that item.

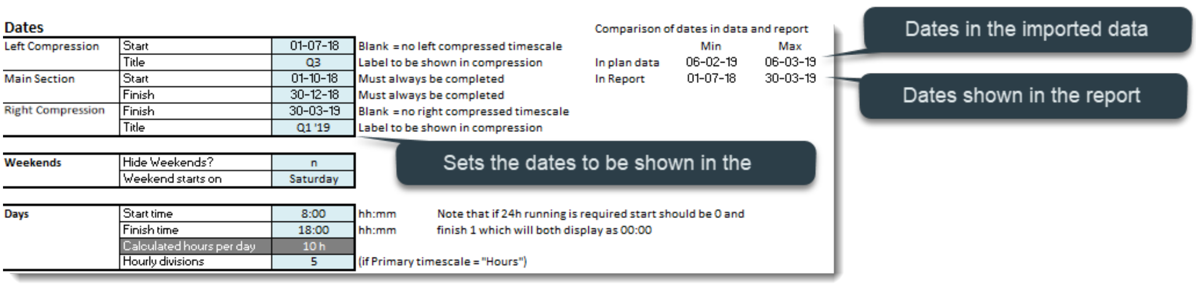
If the task starts before the chosen report date or finishes after the report's finish date these dates are truncated to allow the task to display.

These features mean that rolling a plan on a page report forwards to show only the current activity is very easy – simply change the start and finish dates for the report, and SummaryPro takes care of everything else; hiding or truncating tasks which fall outside those date, shifting timescales and ensuring that tasks and milestones are correctly aligned etc.

Introducing the controls available

Setting the display dates and displaying compressed timescales

The "Dates" section on the STANDARD SETTINGS sheet provides full control over the dates displayed.



If the left or right compression date fields are blank there will be no compressed timescales.

The Weekend section allows you to decide if weekends will be included in the timescale calculations. If weekends are "hidden" any task which starts or finishes on a weekend is rounded to finish before the weekend or start after. This option gives more space in the display. The "weekend starts on" option allows you to choose which two-day period makes up the weekend.

The "comparison" section displays the minimum and maximum dates in the source / imported data vs the start and finish dates for the report.

If the dates in the report are insufficient to cover the range of dates in the imported plan an error message will display warning you of this. If this is intentional you can ignore the message.

Dates

Left Compression	Start		Blank = no left compressed timescale
	Title		Label to be shown in compression
Main Section	Start	04-02-19	Must always be completed
	Finish	28-02-19	Must always be completed
Right Compression	Finish		Blank = no right compressed timescale
	Title		Label to be shown in compression

Comparison of dates in data and report

	Min	Max
In plan data	06-02-19	06-03-19
In Report	04-02-19	28-02-19

Check max and min dates in your report to avoid items failing to display as expected

As an additional safety check SummaryPro will display the following error if you should accidentally have dates in the wrong order. This should not be ignored otherwise SummaryPro will fail to display your Plan on a Page summary.

Dates

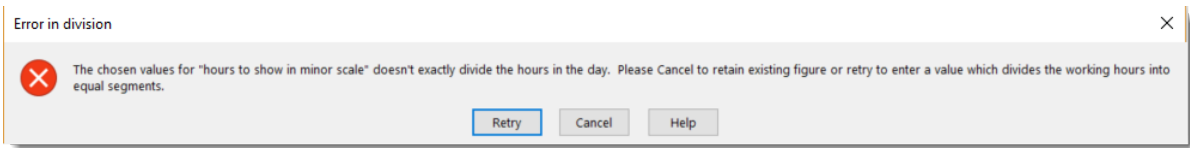
Left Compression	Start		Blank = no left compressed timescale
	Title		Label to be shown in compression
Main Section	Start	31-03-19	Must always be completed
	Finish	28-02-19	Must always be completed
Right Compression	Finish		Blank = no right compressed timescale
	Title		Label to be shown in compression

Please ensure all dates are correct and in the correct sequence as current entries will fail to display

The Days section is only relevant if you display hours in the Top or Primary timescales. This allows you to control:

- The start and finish time for the working day.
- How many hours each "hour" division is.

If "total hours" doesn't divide evenly into the hourly divisions an error message will appear and you will have to select an appropriate value.



Controlling the timescales

The "Timescales" section allows you to choose the division that will be used for each timescale or to not display it at all by selecting "No Entry".

Timescales		Formats		Illustration	
Scale	Show	Main Area	Compression	Main	Compression
Line	Years	yyyy		2019	
Top Scale	Months	mmm		Jan	
Primary Scale	Weeks	dd/mm	dd	01/01	01
Hide date information?		n			

In the “show” column choose the divisions that you want to display for the Line, Top and Primary timescales. You will need to set these from the bottom up (Primary, then top and finally line). When changing the division an error message alerting you to the fact that the labels are incorrect.

Timescales		Formats		Illustration		
Scale	Show	Main Area	Compression	Main	Compression	
Line	Months	yyyy		2019		Check format for Main timescale
Top Scale	Weeks	mmm		Jan		Check format for Main timescale
Primary Scale	Days	dd/mm	dd	01/01	01	
Hide date information?		n				

Simply select more appropriate formats for each of the timescales from the drop downs. Note that you can set choose your own by typing into the format cells, for instance rather than the standard option of “w/c” dd/yy you may want to enter “the week of” dd/mm. This works in the same way as the TEXT function in Excel. The illustration section allows you to see how the dates will display on the timescales.

The final options in this section are:

- “Hide date information” – this allows you to display only incremental numbers for days, weeks, months and years which can be useful when presenting a proposed project which has a variable start date.
- “Round up Primary scale” – selecting this means that SummaryPro will modify the start and finish dates to the start and finish of their divisions respectively. This makes the display of the primary scale more “even”. Thus if you have selected a start date which falls on a Wednesday with weekly divisions SummaryPro will modify the start date to the Monday which allows only full weeks to be displayed.

How the timescales display

The “layout” section controls some of the display characteristics of the timescales:

Layout		
Which scale extends down the page	Primary	
Primary label orientation (Vertical / Horizontal)	H	
Compress into scales	Primary	How big are the compressed timescales (matching Top or Primary divisions)
Show divisions in the primary compressions?	n	
Show line timescale in compessions?	y	
Start/end shape for top line scale	11	
Start/end size for top line scale	2	mm

The table below explains these additional settings.

Option	Explanation
Which scale extends down the page	Choose which (or both) of the scales have lines which extend the height of the page. The “Both” option allows you to control the formatting to give thick and thin lines for the Top and Primary timescales.

Option	Explanation
Primary label orientation	Control if the primary timescale labels are horizontal boxes or vertical lines. Some manipulation of the text format is required in Visio for the vertical option.
Compress into scales	If displaying compressed timescales to the left and/or right control how wide they are – matching the width of either Primary or Top.
Show divisions in Primary compressions	If "n" the compression will be a single box the contents of which is driven by the Label field in the "Dates" section of the STANDARD SETTINGS sheet. If "y" the primary scale will display the individual divisions within the compressed timescale.
Show Line timescale in compression	If "y" the line timescale will display over the top of the compression providing a continuous line scale from left to right. If "n" the line timescale will only display over the main section of the report.
Start/End shape for top line scale	Controls the shape to be used for the marker on the line scale. The 45 shape options available can be viewed in Visio.
Start/End size for top line scale	Controls the size of the marker used (in mm).

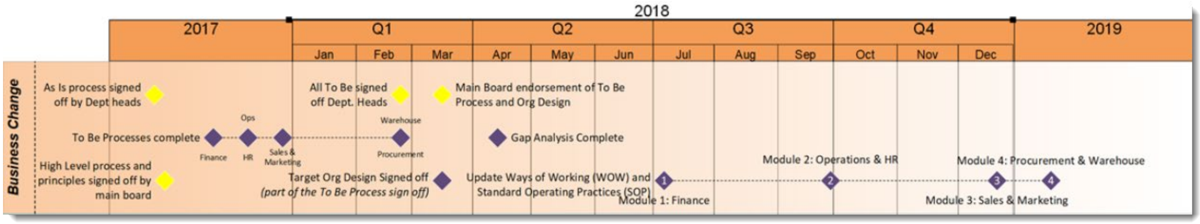
Formatting the timescales

The font (colour, size, style and formatting) is controlled using standard Visio functionality. Simply select the make the change using the normal home / font menu options.

To enable timescales to display the major swim-lanes are set to 50% transparency within Visio. This means that should you want to have a summary plan which only has the timescale displayed at the top with no lines dropping down all you have to do is set the fill to 0% transparent.

Note: the re-ordering macro (double click the Re-Order button) has the option to place the Timescales in front or behind the swin lanes. You may want to vary the transparency depending on your choice.

If you want to have the timescale headings in a different colour, simply make their fill = 0 (i.e. no fill) in the Style section (see below) and then place a coloured rectangle of the correct size behind the timescale.

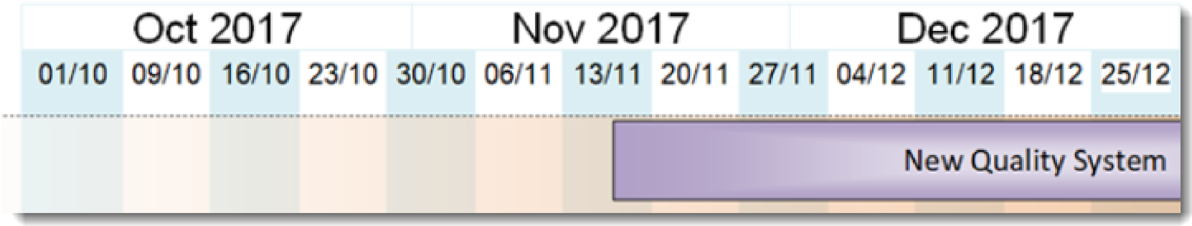


This also works with the swim lanes if you want to have coloured headings on the left.

Setting the colours, line widths etc to be used to format the Timescales is controlled in the STYLES sheet.

	Colour Selector		Foreground		Background		Line		
	Reference	Name in Colour Key	Pick	Pattern	Use own?	Pick	Colour	Width	Type
	white			1				0.24 pt	1
	Default_M[illegible]space							1 p[illegible]	
Time Scales	Floating primary boxes			1				0.24 pt	1
	Line Timescale			1				2.16 pt	1
	Top Timescale boxes colour 1			1				3pt	1
	Top Timescale boxes colour 2			1				3pt	1
	Primary Timescale boxes colour 1			0				1pt	1
	Primary Timescale boxes colour 2			0				1pt	1

Notice that for each of the timescales (major and minor = Top and Primary) there are two settings, this allows the use of alternating styles to allow striped timescales, for instance:



Moveable or Floating date boxes

Sometimes on tall summary plans which will be viewed on screen it is useful to have a reminder of the Primary timescale which can be positioned anywhere on the page. SummaryPro provides this functionality with “floating date boxes”. These are located within the blue box “Floating Primary timescale items – move up as required”.

Time Scales	Floating primary boxes
	Line Timescale
	Top Timescale boxes colour 1
	Top Timescale boxes colour 2
	Primary Timescale boxes colour 1
	Primary Timescale boxes colour 2

These can then be moved up the page and postitioned (vertically) as you need them. They willl always align with the primary timescale when the Plan on a Page is updated however they will not move vertically from your chosen location.

Their size is set at the bottom of the STANDARD SETTINGS sheet and their colour is set on the STYLES sheet.

Floating date boxes - Primary scale		
Height	20	mm
You can move these up from the bottom and they will stay where you put them vertically, can be useful if you veiw the summary on a screen and the dates disapear off the top of the screen		

The floating timescales can also be used to display a timescale at the bottom or even middle of your plan on a page summary when you have chosen not to display the normal timescales at the top of the page.

Explanation of all items in the Standard Settings Sheet

This section provides an Item by item explanation of the STANDARD SETTINGS sheet with pointers to sections where it is covered in detail.

Bar Sizes

This controls the height of the bars and milestones (Changing the bar height p19). It also defines the gaps between major swim-lanes and space allowed for the minor swim-lane dividers (Adding swim lanes p.31). Note the shaded area to the right is a jotting area which allows you to make a note of previous settings.

Page layout / Size

Controls the size and location on the page of the report (Page settings p37). Note the shaded area to the right is a jotting area which allows you to make a note of previous settings.

Dates

Sets the dates (and times if required) the report will cover. It also defines and names the compressions (see Setting the display dates and displaying compressed timescales on p38).

Timescales

Defines which timescales will display and what will be displayed (Controlling the timescales p39).

Layout

Controls how the timescale display within the main section of the report as well as the size of the compressed sections and the Line timescale's format (How the timescales display p40).

Drop Lines / Target dates

Defines if the status line will display and what it will be called (commonly Status or Today). Also defines up to two "target" lines which drop from top to bottom of the report (Adding the Status line and target lines p36).

Display options

"Show de-bug ref?" displays the Visio reference in each shape. This allows a quick visual check as to which shape is which. The same information can be seen by viewing the shape data task pane (view / task panes / shape data) however this option displays all references at once.

Display options	
Show de-bug ref?	n
Show % complete Figures?	y
Show row indicators?	y
Show critical path?	y
Hide rag / progress bars	n
Hide baseline?	n

"**Show % complete figure**" includes the %complete figure in the progress bar.

"**Show row indicators**" displays the row numbers in the summary Plan. These can be useful when deciding where to move items to. These will not print or show up in a PDF.

"**Show critical path**" will cause items identified in the "Critical" column of the DATA AND BARS IMPORT sheet in red (as default – this behaviour is set in the STYLES sheet).

"**Hide RAG / progress** bar" controls if the small bar under the main bar will display to allow the progress and RAG data to be shown. "Hide Baseline" does just that and simplifies the picture.

Dependencies

Controls the size of the dot that marks the start and finish of each dependency displayed as well as the width of the outline of this mark.

Dependencies		
Dependency End width	0.24	pt
Beginning and end size (mm)	1	mm

Milestones

Sets what information is shown in the outline and fill of the milestone as well as the behaviour of the fill colour when the milestone is completed ("Changing what milestones display" p24).

Major Dividing box defaults – max 20 swim-lanes

Major Dividing Box defaults		
Rounding	5	mm

This simply sets the rounding on the major swim-lane boxes, in mm. Note that 0mm is a good setting when using a more box like display or when hiding timescale drop lines by removing the transparency in the swim-lanes.

Minor dividers (Horizontal and Vertical) – max 30 sub swim-lanes

Defines how far into the major swim-lane label width the minor swim-lane dividers stretch as well as controls the display of the optional vertical dividers.

Minor dividers (Horizontal and vertial)		
Line "overhanging" to the left of the display	30	mm
Show vertial dividers?	y	

Task Bars

Sets what information is shown in the outline and fill of the bars as well as the behaviour of the fill colour when the milestone is completed (see "Changing what bars display" p.26).

Baseline bar settings

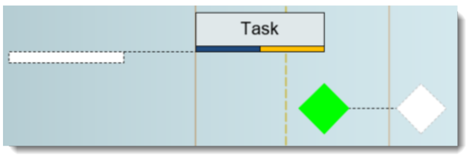
Baseline Bar Settings		
Milestones:		
Dotted baseline milestones?	y	
Baseline Milestone Line	grey	
Baseline milestone Fill	grey	
Hide dates (if shown in main milestones)?	n	
Text Colour	Colour code	
Baseline bars		
Dotted baseline bars?	y	
Basline Bar Line	grey	
Baseline Bar Fill	grey	
Line linking basline to plan (if required)		
Show at all?	y	
Dotted?	y	
Colour	black	
width	0.24	pt

This section controls the look and feel of the baseline elements if they are displayed.

Do you want baseline milestones to be shown with dotted or solid lines? What colour should the baseline outline and fill be? Do you want to display dates in the milestones?

The same options are controlled for the baseline task bars.

If the baseline item overlaps the planned items, the relationship is clear, if the baseline finish is earlier than the current start date, the two can be disassociated. To avoid this SummaryPro provides the option of a dotted line joining the planned and baseline items (Displaying the baseline p30); this section controls if this line is displayed and if so how it looks in terms of colour, width and dotted or solid.



Controls for Task Bars and Milestones

These are covered in other sections:

- Changing what bars display, p26
- Changing what milestones display, p27

Key Shapes

Control what the key shapes display: Changing what is displayed on the key p.25

Container settings

Designating a reference as being a container on the Bar detailed sheet allows you to change what is shown on the shape's fill, line, etc. – see Container options, p.33

Progress

You can show or hide progress and choose if it is shown as a bar under the main task bar or within the bar as shading - Displaying % complete, p.28

Attachment points

Sets the attachment points to be visible or invisible. Attachment points are useful when adding icons which need to be linked to a date, for instance, a deadline or the finishing flags.

Attachment points - used to "attach" brainstorm icons to dates on the summary		
Show ? (make lines and fill visible)	y	Set to "y" to see the attachment points for initial layout and then "n" to hide

Floating date boxes

Controls the height of the floating date boxes which provide a copy of the "Primary" timescale (Moveable or Floating date boxes p42).

Floating date boxes - Primary scale		
Height	20	mm

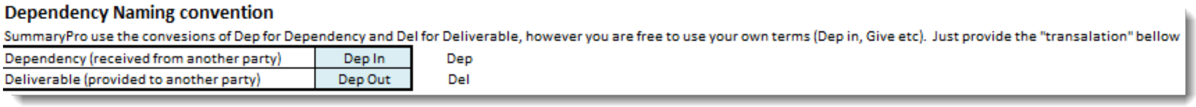
Auto Layout timescale triggers

These entries control when the Auto Layout switches between time periods when you use the Auto Layout function to set timescales. There should be little reason to change this unless you're dissatisfied with the choices that the Auto Layout function makes.

AutoLayout timescale triggers for Primary timescale	
Minimum thresholds (in days) to set the Primary timescale	
Days	31
Weeks	98
Months	366
Anything more will display Quarters	
Set the minimum and maximum space that all the chosen bars can take up (main task bar + RAG/Status + Baseline)	
Min bar size	2
Max bar size	20

Dependency naming conventions

Different people use different terms of dependencies (Give | Get, Dep | Del, Dependency | Deliverable, or Dep In | Dep out for instance). SummaryPro uses Dep | Del internally. Use this section to “translate” your chosen term so that SummaryPro knows what term you use



Dependency Naming convention

SummaryPro use the convesions of Dep for Dependency and Del for Deliverable, however you are free to use your own terms (Dep in, Give etc). Just provide the "transalation" bellow

Dependency (received from another party)	Dep In	Dep
Deliverable (provided to another party)	Dep Out	Del

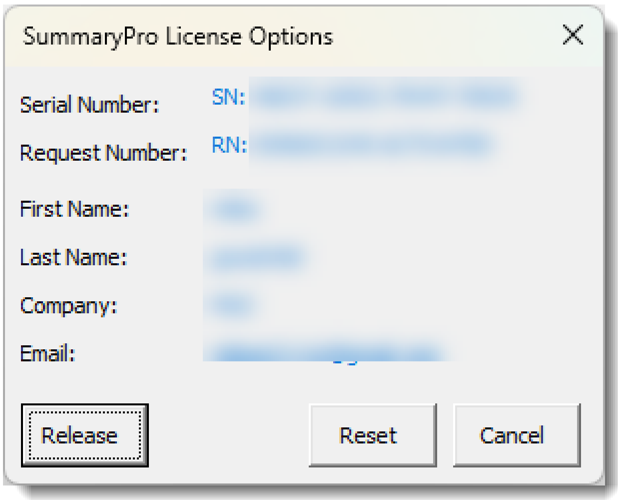
Save Backup button

This allows you to save a backup of your current Excel file and, optionally, the matching Visio file if it is open. This has been requested so that users can save the file as it stands before committing to a significant change.

Licence options button

Clicking on this will display your licence details and allow you to release the licence from the machine to be reused on another machine. Note that this will prevent SummaryPro from working on this machine.

If you need to re-enable the current machine before double-clicking on a SummaryPro Excel engine to open it, press and hold the Shift and Command or Windows key (<Shift><Win>) and keep them pressed until the “Licence Options” dialogue box is displayed



Importing data to drive milestones and bars

Introduction and data requirements

SummaryPro is at its most powerful when you can copy filtered data from a source plan, or multiple source plans, and paste it into the SummaryPro engine. In this way, you can use the power of your existing planning tools, but with a better display engine. To do this the source planning tool has to be able to:

- Accept a number entry from 1-300 into a custom field.
- Filter on this number field to only display those lines with this reference.
- Output a table containing the data required by SummaryPro so that it can be copied. Some tools allow this copying directly; however, some may need to output or extract an Excel file, which can then be copied.

The data required to display milestones and bars is shown below. Note that dependencies require further data as shown in the "Dependencies" section on page 58.

Required	Optional
Reference (1-300)	RAG colour (Red, Amber, Green, Complete + 2 custom)
Start and finish date / time (date and time)	Status Date (date and time)
Milestone? (Yes / No)	Plan name (free text)
Name (free text)	Critical? (Yes / No)
% Complete (%)	Baseline Start and finish date / time (date and time)
	Major and minor swimlane membership (free text)

With the minimum data set a summary plan can be produced. The presence of the optional data allows future elements to be displayed for instance:

- The RAG bar.
- Status date line.
- Baseline information.
- Critical path.
- Major and Minor swimlanes using he Auto Layout functionality.

Notes about the data which needs to be presented

Date formats

The date information must be in a format that Excel recognises as a date (i.e. a number like 21/01/19 rather than Monday 21st Jan 2019). When you click on the "update" button on the DATES AND BARS IMPORT sheet, any dates that aren't in the correct format will be highlighted with some conditional formatting. Note this will also check that the correct entries are used in the milestone column and grey out items that will not be shown as they fall outside the timescale set in STANDARD SETTINGS. The dates can be simple dates with no time, as SummaryPro will add the appropriate time to align with the working time set in the STANDARD SETTINGS sheet.

Milestone data

If a milestone only has a start date, SummaryPro will set it to be delivered at the start of the working day. If it has a finish date or both dates, it will be delivered at the end of the working day. This is especially useful when using SummaryPro to summarise Primavera files as it respects Primavera's start and finish milestones.

If a milestone has a time, this will be used (as long as it is within the working day set on the Standard Settings sheet). Note that whilst this time element is most visible when hours are used on the timescale, it can also enable milestones to correctly line up with start dates due to the accuracy of SummaryPro.

SummaryPro will not assume a task with the same start and finish date is a milestone as it could be a one-day task; hence, the use of the "milestone?" field.

At the time of writing SummaryPro has been proven to work with data from:

- Microsoft Project desktop and On-Line/server.
- Primavera.
- Excel (obviously!).
- SmartSheet.
- SAP and Jira (an additional workbook was used as they don't have the ability to hold and output the required 1-300 reference, but do have unique references which can be associated with the required references).

It is also possible to use SummaryPro on its own and simply maintain the data by hand; this is useful when producing a plan from dates not held on a planning tool.

The following sections give some advice on extracting data from planning tools.

Primavera

You need to set up an extract to output the required information in an excel worksheet. This data is then copied and pasted into the SummaryPro Excel engine file.

Primavera can output a single date (start or finish) for a milestone at the beginning or end of the day; this isn't an issue for SummaryPro as it adds in the appropriate time to align with the working time set in the STANDARD SETTINGS sheet. It also handles dates with * (which signify constraints or relationships with external projects).

Project

Introduction

The most efficient use of SummaryPro with MS Project is when you have a couple of views set up allowing you to quickly display the output data to copy and paste from Project into SummaryPro.

The initial tagging of lines with the Visio Reference (1-200 or 300) can be done in the Gantt view, simply add your chosen Custom Number field and enter the numbers.

You then need a view which has:

- A table set up to display the desired output.
- A filter to only show lines with Visio References.

There are several possible scenarios, based on the Project file that you're using as your source, which need different actions to get to this point:

1) You know that the file that you're using doesn't have any custom fields set up (either because it is brand new or you know there are no custom fields setup); either copy your plan data into the supplied sample file or again use it as a source.
2) Your file may have custom fields in and / or you want to use different fields; set up your chosen fields and views.

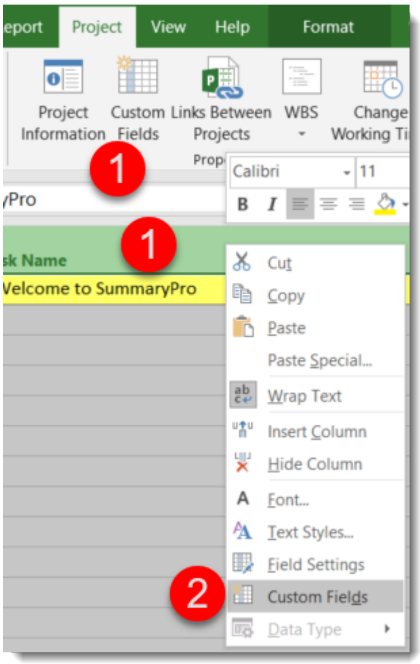
All this can sound complex, especially if you don't feel confident in using MS Project however the process is very simple, and the steps below will walk you through the process.

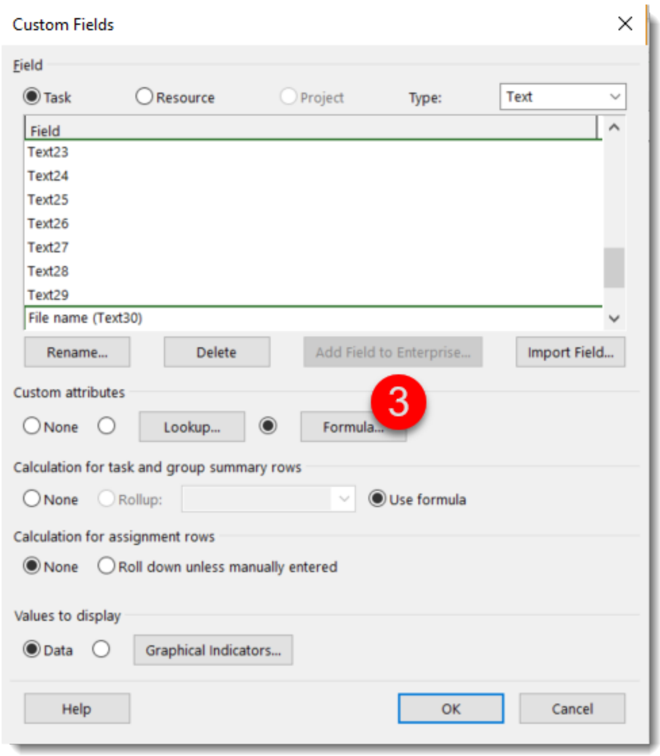
Checking for existing custom fields

Note that if you have inherited a file it can be hard to tell at a glance if a custom field is in use. Obviously, if the name has changed from Text30, it is probably in use; however, some people change the fields (insert a formula, etc.) without changing the name. To check if this has happened, you should examine each field in turn.

Bring up the custom field dialogue either by:

- right-clicking on any column heading and choosing "custom fields" or
- selecting "custom fields" from the Project / Properties menu.





Inspect each field for possible modification, for instance in the illustration above we see that Text30 has a formula associated with it.

Option A – using the supplied sample "as is"

In this option you will use the supplied file (stored in My Docs / SummaryPro / Samples) and will simply enter your plan data and use the supplied views to set up and export data.

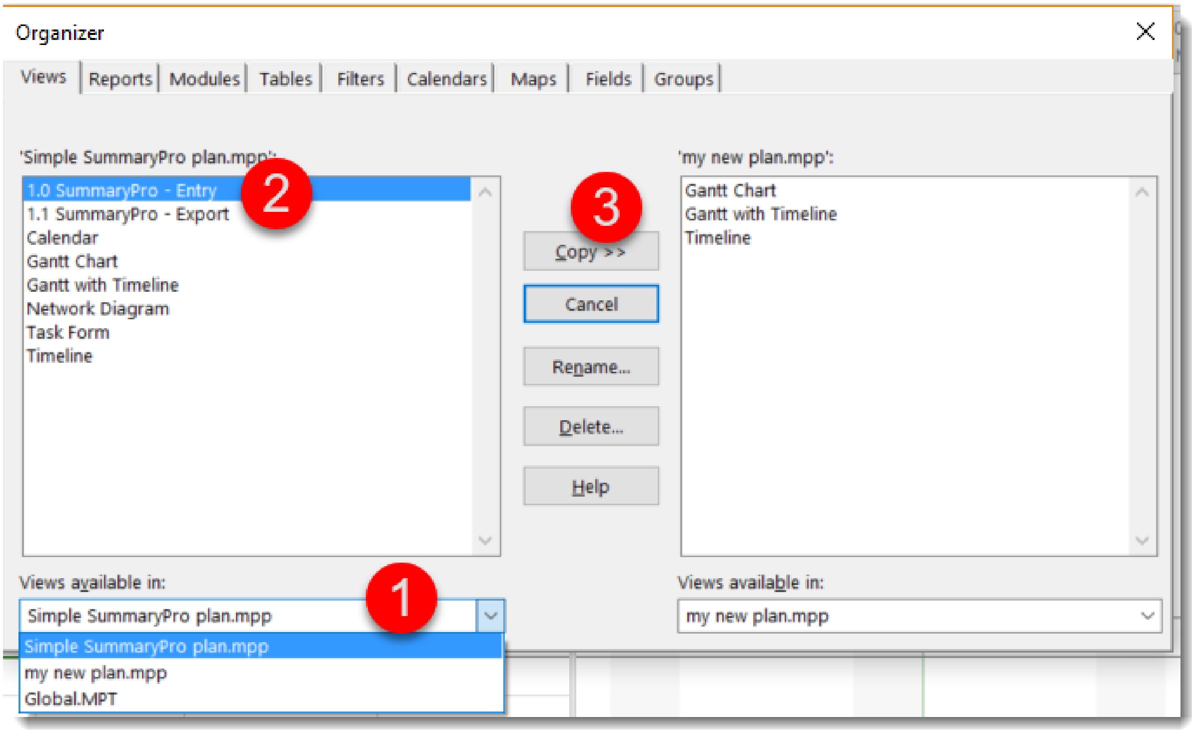
1. Open the supplied MS Project file "Simple SummaryPro plan.mpp" from My docs / SummaryPro / Samples.

2. Either type in you plan data or copy from another file. If copying; do so column by column, including any resource data, to avoid accidentally pasting into an incorrect column due to differences in the table.
3. Save as your new project plan.
4. Go to “1.0 SummaryPro – Entry” view and enter your references in the Visio Ref column.
5. Go to “1.1 SummaryPro – Export” view and copy the contents into SummaryPro and you’re ready to produce your Plan on a Page.

Option B – Using the sample file as a source

In this option you either know that your existing MS Project plan doesn’t have any custom fields set up however you would prefer to use your existing file. In this situation use the supplied file as a source for the required fields, tables, filters and views.

1. Open both your existing file and the supplied MS Project file “Simple SummaryPro plan.mpp” from My docs / SummaryPro / Samples.
2. Display the “organiser” dialogue by one of the follow methods:
    a. Clicking on the “Gantt Chart” drop down in Task Views and then clicking on “more views” and then finally on the “organiser “button.
    b. Right mouse on the view bar on the left hand side of the screen, select more views and then click on the organiser button.
    c. Using the key press sequence <ALT><T>,<G>.
3. Ensure that the Sample file is displayed in the “Views available in” on the left hand side and your new file is on the right.
4. Select the items to be copied across on the left and then click on the “copy” button.



5. This general technique should be used to copy the following from the sample to your file:
    a. Views:
        i. 1.0 SummaryPro – Entry.
        ii. 1.1 SummaryPro – Export.
    b. Tables:
        i. 1.0 SummaryPro – Entry.
        ii. 1.1 SummaryPro – Export.
    c. Filters:
        i. 1.1 SummaryPro – Export.
    d. Fields:
        i. File name (Text30).
        ii. RAG (Text2).
        iii. Status Date for Visio (Date3).
        iv. Visio Ref (Number2).
6. Once all required items have been copied close the dialogue using the "Close" button and save your file.
7. Go to "1.0 SummaryPro – Entry" view and enter your references in the Visio Ref column.
8. Go to "1.1 SummaryPro – Export" view and copy the contents into SummaryPro and you're ready to produce your Plan on a Page.

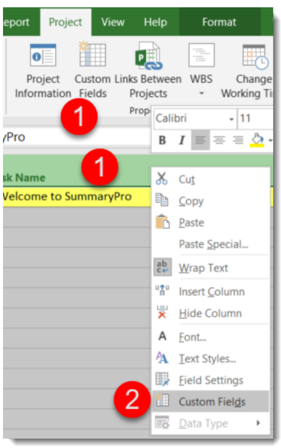
Option 3 – creating your own fields, filters, tables and views.

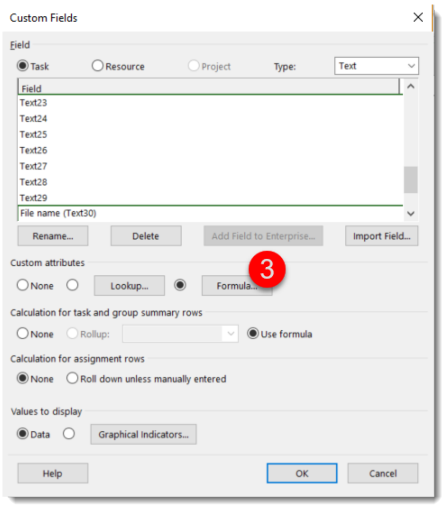
In this scenario you are unsure if you have conflicts or know that there some of the custom fields above are in use for other purposes. As it is not possible to know which fields you will select in the instructions below we will replace numbers with letters – simply select a numbered custom field for each letter.

Views are built up by combining Tables, filters and Groups. In turn these are dependent on fields, so we start with fields, then build tables and filters before combining them into the required views.

Custom fields

1. Bring up the custom field dialogue either by:
    a. right clicking on any column heading and choosing "custom fields" or
    b. selecting "custom fields" from the Project / Properties menu





2. Locate each of the custom fields that you want to use and rename them by selecting the field name (for instance Text30) and clicking on the "rename" button and entering the defined text shown in the table below. Then customise the field as per the third column.

Field Name	Rename to	Customisation
TextA	RAG	None required. You could set up a lookup to define RAG to be Red, Amber, Green, Complete as SummaryPro will ignore any other entry, however this is up to you.
TextB	File Name	Click on the Formula Button and enter [Project] and click OK. Click on “Use Formula” choice under “Calculation for task and group summary rows”.
NumberA	Visio Ref	None.
DateA	Status Date for Visio	Click on the Formula Button and enter [Status Date] and click OK. Click on “Use Formula” choice under “Calculation for task and group summary rows”.

3. Click OK.

Set up tables

4. Bring up the “More tables” dialogue by either:
    a. Clicking on the View / Data / Tables / More tables menu.
    b. Using the key strokes <ALT><V>,<B>,<M>.
5. Click on New.
6. Enter the table name as 1.0 SummaryPro – Entry.
7. Choose to display the following fields, note that all except ID, Visio Ref and Name are optional:
    a. ID
    b. Indicators
    c. Visio Ref
    d. Name
    e. Duration
    f. Start
    g. Finish
    h. Predecessors
    i. Successors
    j. Resource names
8. Ensure that the “lock first column” check is set and click OK to finish defining the table.
9. Click on New to define the second table.
10. Enter the table names as 1.1 SummaryPro – Export.
11. Choose to display the following fields, note that none of these are optional and they must be in this order:
    a. ID
    b. Visio Ref
    c. Name
    d. Start
    e. Finish
    f. Baseline Start
    g. Baseline finish
    h. % Complete
    i. RAG
    j. Milestone
    k. File name
    l. Status Date for Visio
    m. Critical
12. Ensure that the data format is in a format which Excel can recognise – a simple numeric format is the safest such as “dd-mm-yy” or “dd/mm/yy h:m”.
13. Ensure that the “Lock first column” is checked.
14. Ensure that the “add new column interface” is unchecked.

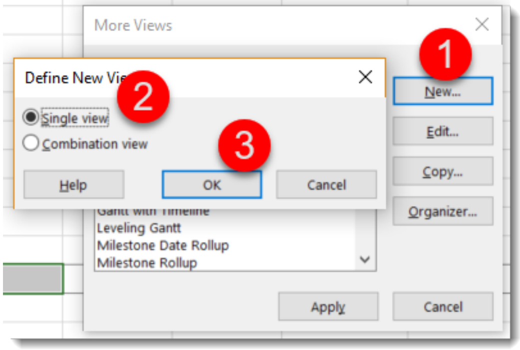
15. Click “OK” to define the table.
16. Click “Cancel” to exit the “more tables dialogue”. This is counter intuitive but don’t worry you have already defined the tables (they should be showing at the top of the listing) so the “cancel” is only to avoid applying a new table to the view you’re currently in.

Set up the filter

17. Display the “more filters” dialogue by either:
    a. Clicking on the filter drop down in the View / Data menu.
    b. Using the key press sequence of <ALT><P>,<F>,<M>.
18. Click on New and set the filter name as 1.1 SummaryPro – Export.
19. Define the filter as:
    a. Field name - Visio Ref.
    b. Test - “does not equal”.
    c. Value – 0.0.
    d. Show related summary rows to no or unchecked.
    e. Show in menu as yes or checked.
20. Press the “Save” button and again “Cancel” to finish setting up the filter.

Setting up the views

21. Display the “more views” dialogue by one of the methods below:
    a. Clicking on the “Gantt Chart” drop down in Task Views and then clicking on “more views”.
    b. Right mouse on the view bar on the left hand side of the screen, select more views.
    c. Using the key press sequence <ALT><V>,<M>.
22. Click on “New” and select “single view” and then click on “OK”.



23. Name the view as 1.0 SummaryPro – Entry.
24. Define the view as:
    a. Name: 1.0 SummaryPro – Entry.
    b. Screen: Gantt chart.
    c. Table: 1.0 SummaryPro – Entry.
    d. Group: No Group.
    e. Filter: 1.1 SummaryPro – Export.
    f. Highlight filter = yes or checked (this will highlight all item which are flagged to be exported when you enter or refresh the view in use).
    g. Show in menu = Yes or checked.
25. Click OK to save the view.
26. Click on “New” to define the export view, again this is a single view.
27. Define the view as:
    a. Name: 1.1 SummaryPro – Export.

b. Screen: Task sheet.
c. Table: 1.1 SummaryPro – Export.
d. Group: No Group.
e. Filter: 1.1. SummaryPro – Export.
f. Highlight filter = no or unchecked (thus only displaying items to be exported).
g. Show in menu = Yes or checked.

28. Click OK to save.

Set up and run your data

29. Go to “1.0 SummaryPro – Entry” view and enter your references in the Visio Ref column.
30. Go to “1.1 SummaryPro – Export” view and copy the contents into SummaryPro and you’re ready to produce your Plan on a Page.

Setting up MS Project to drive multiple reports

Note that if you want to drive multiple reports from the same project plan, for instance a board presentation, one for the programme manager and one for the project team, each report needs a separate export view to drive the separate pairs of SummaryPro files.

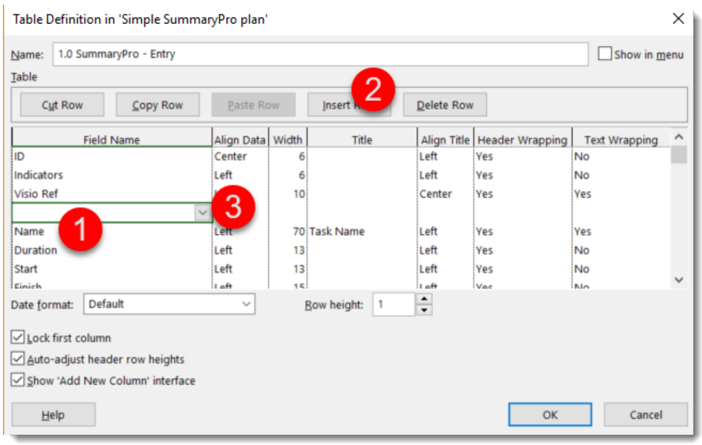
This is very simple and quick to set up. All that you need to do is decide which customer number field will be used for each and then copy and modify the necessary filters, tables and make a new view as shown in the sections below.

Define the new number field

1. Bring up the custom field dialogue either by:
   a. right clicking on any column heading and choosing “custom fields”.
   b. selecting “custom fields” from the Project / Properties menu.
2. Select the chosen customer number field and rename (e.g. Board Ref) and click OK.

Edit the entry table

3. Bring up the “More tables” dialogue by either:
   a. Clicking on the View / Data / Tables / More tables menu.
   b. Using the key strokes <ALT><V>,<B>,<M>.
4. Select “1.0 SummaryPro – Entry” and click on the “edit” button.
5. Select the Name row and click on “Insert row” to make space for your new number field.
6. Choose the newly defined number field (for instance “board ref”).



7. Click OK to save the changes to the import table.

Define a new table

8. Select an existing export table (for instance 1.1 SummaryPro – Export) and click on the "Copy" button.
9. Change the suggested name of the table, for instance to "1.2 SummaryPro – Board export".
10. Change the 2nd item in the list to your new field name (in this example "Visio Ref" would become "Board Ref").
11. Click OK to save the change.
12. Cancel to stop changing tables.

Define a new filter

13. Display the "more filters" dialogue by either:
    a. Clicking on the filter drop down in the View / Data menu.
    b. Using the key press sequence of <ALT><P>,<F>,<M>.
14. Select an existing SummaryPro export filter, for instance "1.1 SummaryPro – Export" and click the "copy button".
15. Change the suggested name of the table, for instance to "1.2 SummaryPro – Board export".
16. Change the field name to your new field.
17. Click "OK" to save the filter.
18. Click "Cancel" to leave the "more filters" dialogue.

Set up the new export view

19. Display the "more views" dialogue by one of the methods below:
    a. Clicking on the "Gantt Chart" drop down in Task Views and then clicking on "more views".
    b. Right mouse on the view bar on the left hand side of the screen, select more views.
    c. Using the key press sequence <ALT><V>,<M>.
20. Select an existing export view and click the "copy" button.
21. Change the suggested name of the view, for instance to 1.2 SummaryPro – Board Export.
22. Change the table and filters to your new table and filter.
23. Press "OK" to save the view.
24. Press "Cancel" to exit the "more views" dialogue.

Enter your new data

Bring up the 1.0 SummaryPro – Entry view and enter the new references against the items to be reported in the new Plan on a Page and then use the new Export view to filter only on these and start to generate your new report.

Project On Line/server or using an extract

Using MS Project On-Line is exactly the same as with the desktop version, however you may need to work with your administrator to define new field, depending on the configuration at your company.

Excel

If your planning data is held in Excel you will need to set up a filtered view which reports the data needed by SummaryPro (see the Introduction and data requirements on page 47). Once done it is simply a case of copying across into SummaryPro.

SAP

A client has used SummaryPro to display production data held in SAP to aid comprehension and analysis of the weekly / monthly production schedule. As this implementation of SAP couldn't hold the required reference numbers (1-300) and it is doubtful that this would be possible under any circumstances a Data Manipulation sheet was placed between SummaryPro and SAP to:

- Resolve data issues, for instance the translation of planned to process order.
- Dynamically apply the required SummaryPro references.
- Present the data in an easy to copy format ready to be pasted into SummaryPro.

Once these issues were solved the production facility was able to quickly and easily produce daily and weekly plans which displayed the:

- Current production plan.
- Production achieved against the weekly baseline.
- A one-month summary covering over 7 feet of plan produced at 1:1 scale in SummaryPro.

See the blog article "https://www.summarypro.co.uk/blog/displaying-sap-production-data-in-easy-to-read-summary-plan.aspx" for more details.

Smartsheet

Smartsheet is a configurable product that allows you to hold data as cards (like Slack or Jira) or to have elements of Gantt change presentation. It can output tables and allows you to configure the fields to be presented in the tables, so you can export/copy and paste in a similar way to Excel.

Thus, it can be used as a SummaryPro source if the exported items have actual dates. Simple statements like Q3 will not work with SummaryPro as Excel can't resolve a date.

Jira, SAP or another planning tools which doesn't support custom fields

Any tool which can provide the data that SummaryPro needs except the numerical flags 1-300 etc, with either through export or via copy and past, can support SummaryPro by using an intermediate Excel sheet to associate the unique reference that the planning tool will use for each item with the numerical flag that SummaryPro needs.

You can then use a VLOOKUP/ XLOOKUP to translate the unique reference from Jira etc to item 1 that SummaryPro needs.

Emails / no plan – entering data directly into SummaryPro

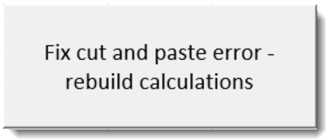
Where there is no source planning tool you can still produce attractive and valuable summary plans by entering the data directly into SummaryPro. This is very useful if other people are used to issuing dates from their plan or projects.

Combining multiple data sources

One of the brilliant things about SummaryPro, which accepts data via copy and paste rather than linking to a specific plan, is that you can pull data from a variety of sources and display it on the same Plan on a Page.

The only constraints on this are:

- You need to ensure you don't overwrite data set B when copying in a slightly larger than normal data set A. To avoid this, it is suggested that you:
  - Leave some space between data sets.
  - Visually check the gap remains.
  - If the data gap is closing copy and move the further data sets further down. Do not cut and paste them as Excel is a little too clever and calculations will move to continue to point to the data in its new location, meaning the new data will not be picked up. This will cause an error and prevent SummaryPro from updating. If you think this has happened, you can use the Fix button to repair the issue



- You will need to manage the references so that they don't overlap, unless this is your intention, i.e. you want to combine data from two sources into the same bar on the plan.

Once these items are taken care of you have the ability to produce the Summary Plan that you want using the data that is available to you even if it is held in different formats and planning systems. A real-world example of this was the combination into one Plan on a Page of:

- Production data held in SAP.
- Plant Maintenance schedules held in Excel.
- SAP outage calendar held in MS Exchange and email exchanges.

Dependencies

Introduction

The implementation of dependencies within SummaryPro assumes that for each dependency, there are two unique milestones present in the plan(s): the supplier and the customer. It doesn't matter if these are linked. In the situation where there is only a single milestone showing a dependency on an external supplier, this will raise a warning flag; however, SummaryPro can process this. The warning flag is mainly there to prompt the thought, "Should there be another milestone for this dependency?".

Each of these milestones must have the following:

- A unique reference – anything you want to use will be accepted.
- A flag showing this milestone is a Dependency (Dep) or Deliverable (Del). Note that you can set the terms you prefer to use in the STANDARD SETTINGS sheet
- A date in a format that Excel can read as a numerical value.
- % complete (i.e. 0 or 100%).

Optional information includes:

- RAG.
- The source project.
- The other party in the relationship.
- Is the milestone / dependency critical?

As with all other aspects of SummaryPro this data can be held in, or collated from, a range of planning tools or locations.

SummaryPro will display each dependency as a line linking a circle and arrow (the circle being at the supplier end and the arrow indicating the customer end) and can display the RAG of each milestone if the data is provided. You can choose what (if any) text to display on the dependency line to provide brief details of the deliverable/dependency being provided.

Note that you don't have to display separate milestones in the summary plan for both ends of the dependency – the Plan on a Page can show just the dependency feeding into / out of a task.

Critical dependencies will display with a red line (assuming critical = red in the STYLES sheet). Note: the line will become dotted if the dependency is running backwards in time to highlight this error.

Setting up the data to allow dependencies to be shown

The data should be presented to SummaryPro using the following column order:

1. Dependency Reference
2. Dep or Del?
3. Name
4. Other Party
5. Project
6. Finish
7. Total Slack
8. % complete
9. RAG
10. Critical

If using MS Project, please see the explanation of the fields, tables, filters and views which are contained in the second sample project file "Dependencies – SummaryPro.mpp" in section "Using MS Project to track and export dependencies" page 61. This is only an example of what is required/possible. If the custom fields etc. do not match your normal template then please modify using the instructions contained in the section "Option 3 – creating your own fields, filters, tables and views." page 51.

Note that when learning how to use the dependency elements of SummaryPro it can be useful to enter information directly into SummaryPro to experiment. Once familiar with the functionality, the dummy data can be replaced with live data from your plan(s).

Importing the dependencies

The dependency data is entered into the DEPENDENCIES IMPORT sheet, either directly or by copy and paste from your plan(s).

B	C	D	E	F	G	H	I	J	K
Dependency Reference	Dep/Del	Name	Other party	Project	Finish	Total Slack	% Complete	RAG	Critical
Dep_001	Del	Test 1			22-10-18 00:00		0%	Green	
Dep_001	Dep	Test 1			22-10-18 00:00		0%	Amber	

When entering various error checks are carried out:

- If Excel displays a warning concerning circular references the date information is not in a readable format. Please return to the source and reformat so that Excel can read the date as a number. Note that when clicking the "Update" button such dates will also be highlighted with conditional formatting.
- If an error is displayed in the column "Dups and Orphans" this is a sign that either the reference is used more than 2 times or that there is only one instance.
    - If there are too many references, please return to the source and ensure that each dependency has only one suppliers milestone and one customer milestone. If the same item is supplied to two or more customers each of these relationships needs to be represented by a separate dependency. This is to allow different levels of criticality or RAG statements.
    - If there is only one instance of the dependency reference check that this is correct. The only situation where this is expected is when the item is being supplied by an external supplier / project who's plan you don't have. If this is the case SummaryPro can display the dependency.
    - Until you have elected to display the dependency on your summary plan by entering the Dependency Reference in one of the 30 avaiable slots there will be a "dep not defined" message in "Dupes and Orphans". This will be resolved by entering the Dependency Reference into the "plan ref" column on the DEPENDENCY DETAILS sheet.
- If an error is displayed in the "Date Issue" column this dependency can't be displayed as it falls outside the time period covered by the Plan on a Page summary.

The pivot table to the right summaries the dependencies for convenience.

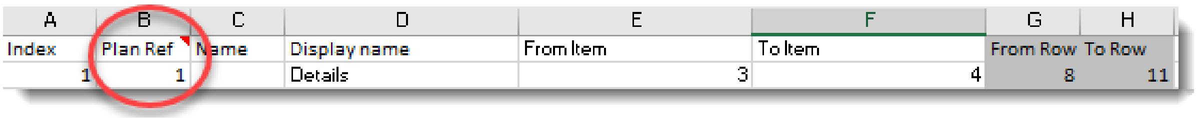
Click on the "Update dependencies" button to refresh the dependency data in SummaryPro.

If “Cut and Paste” has been used on this sheet to move data around some of the underlying formulae will be pointing to the wrong location and errors will start to show. This can be fixed by clicking the “Rebuild to fix Cut Error” button:

Defining the dependencies

Now that the dependency data is within SummaryPro you must define what the dependencies should link on the summary plan. This is done on the DEPENDENCY DETAILS sheet.

Unlike for the bars and milestones the decision to display the dependency is driven by the inclusion of the specific reference used in the plan in the “Plan Ref” column. Note that until this is entered, there will be a “dependency not defined” flag against it in the DEPENDENCIES IMPORT SHEET.



A	B	C	D	E	F	G	H
Index	Plan Ref	Name	Display name	From Item	To Item	From Row	To Row
1	1		Details	3	4	8	11

The Index column shows the 30 references which can be displayed in SummaryPro. This doesn’t mean you can only import 30; you can import as many as you like. However, you will need to select which 30 you want to display by entering their unique reference, which matches that in the import sheet, into one of the 30 positions in the Plan Ref column on the DEPENDENCY DETAILS sheet

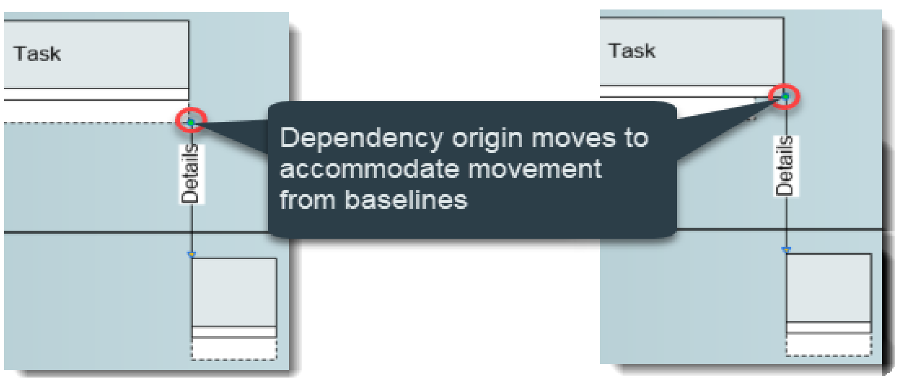
The text to be displayed on the dependency line is entered into the “Display name” column; however, the “Name” column is only for information.

The “From Item” and “To item” columns define which items on the summary plan are linked by the dependency.

- “From Item” defines which reference (on the BAR DETAILS sheet) is the supplier of the dependency.
- “To Item” defines which reference is in receipt of the dependency.

Once you have defined which items are linked by the dependency SummaryPro knows where to place the dependency on the plan.

SummaryPro will automatically adjust vertical position of the start or end points if the baseline is shown to accommodate the situation where the start or end of the task has moved away from the baseline. This ensures the dependency remains in contact with the associate task or milestone.



Note that the “update dependencies” button, pivot table and the error checks are repeated on this sheet for ease.

If you have external dependencies which obviously can’t have a true “From Item” - you have to select and existing item on the row which you want to display external dependencies so that SummaryPro can pick up a row to start the milestone from. Note you can define a dummy task (with data in the DATES AND BARS IMPORT sheet) which is too early or late to display on the report to generate a “blank” row from which to originate such dependencies.

Formatting the dependencies

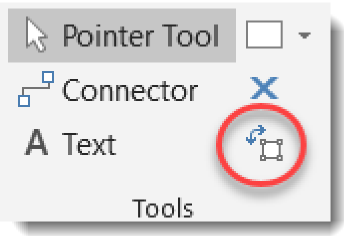
The settings to control how dependencies display are detailed in the following sections:

- Line and terminating shapes: STANDARD SETTINGS sheet, see “Dependencies “p44.
- Colours of the line: STYLES sheet, see “Adding colours” p19.

The Visio display element

The dependencies will be updated when the “update” button is double clicked in Visio along with all the other elements of the Plan on a Page.

The text shown on the dependency line can be moved around on the line using the “Text Block” tool on the Home / Tools menu or triggered using the key combination <SHIFT><CTRL><4>.



This allows you to move the text or to change the shape of the box that contains it (as well as the orientation). Note that this change remains in effect and will apply the next time this line is used.

This standard Visio functionality is useful to avoid the text on a dependency line conflicting with other items on the summary plan.

Using MS Project to track and export dependencies

Introduction

The second sample project file “Dependencies – SummaryPro.mpp” provided in the initial installation of SummaryPro (stored in My Docs / SummaryPro / Samples) provides some useful views and fields to help enter, maintain and export to SummaryPro the key dependencies in your project. This is provided as an assistance rather than a mandated set of fields or views.

Application of the template to your plan

The same options and techniques as defined in the “Project” section (page 48) apply.

Note that the second sample file (“Dependencies – SummaryPro.mpp”) has the same views etc as the 1st sample file (“Simple SummaryPro plan.mpp”) and so can be used in place of the simpler file.

Definition of the fields, tables, filters, groups and views provided.

Views

2.1 Dep Mgmt – Entry: Defines each dependency:

- Screen: Gantt Chart.
- Table: 2.1 Dep Mgmt – entry.
- Group: No Group.
- Filter: Dep/Del Combined (highlight filter).

2.2 Dep Mgmt - combined by ref: Compare milestones tagged with the same reference to check that each dependency reference is applied to only 2 milestones and is a matching pair:

- Screen: Task sheet.
- Table: 2.2 Dep Mgmt – combined by ref.
- Group: 2.3 Dep/Del – Combined by ref.
- Filter: Dep/Del combined (no highlight filter).

2.3 Dep Mgmt - Visio Export: Export dependency information to SummaryPro:

- Screen: Task sheet.
- Table: 2.3 Dep Mgmt – visio export.
- Group: No Group.
- Filter: Dep/Del combined (no highlight filter).

Tables

Name	Fields
2.1 Dep Mgmt – entry	ID, Indicators, Name, Dep/Del, Other Party, Dependency Reference, % complete, RAG, Finish, Deadline, Duration, Predecessors, Successors.
2.2 Dep mgmt - combined by ref	ID, Name, Dep/Del, Other party, % complete, Total Slack.
2.3 Dep Mgmt - visio export	ID, Dep/Del, Name, Other Party, Project, Finish, Total Slack, % complete, RAG, Critical.

Fields

Name	Use	Characteristics
Text12 – Dep/Del	Flag milestones as either Dependency (Dep) or Deliverable (Del) or neither (blank).	Look up for Dep or Del.
Text17 – Other Party	Indicate who the other party is in the Supplier/Customer relationship within the defined dependency.	Free text field.
Text28 – Dependency References	Assign a unique reference to the dependency which will be used twice – once against the Dependency milestone and once against the Deliverable milestone.	Free text field.

Filters

Name	Filter	Show summary rows?
Dep/Del combined	Dep/Del = Dep OR Dep/Del = Del.	Don't show summary rows.

Groups

Name	Fields	Settings
2.3 Dep/Del - Combined by ref	Dependency Reference.	Don't show summary tasks.

Notes and Auto Layout to make setting up a POAP easier

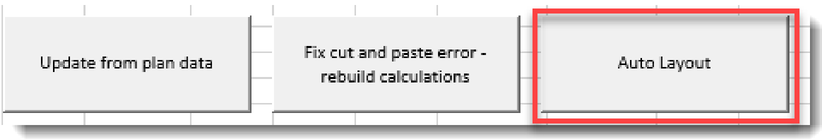
Notes in Dates and Bars imports

When you use SummaryPro to generate many summary plans, it can be useful to write notes to yourself about where the data comes from. A space exists to do this on the right-hand side of the Dates and Bars import sheet. This box is just below the orange “note:” field.

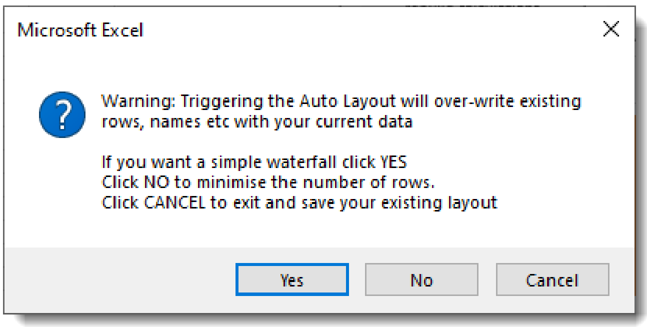
Auto layout option

A new addition (build 1-13.6 and later) to SummaryPro is a macro that automatically lays out your plan on a page report. This sets the location of the imported data based on each item’s start date. This can save time during the initial setup, allowing you to quickly lay out the shapes and then edit their row numbers to achieve the POAP you want to display.

The Auto Layout button on the DATES AND BARS IMPORT sheet triggers this function.



The first choice when using this function is to replace all the previous row entries. You can choose not to do this so that previous choices for new names and styles will be respected. However, if you choose not to do this, this function will replace any previous row allocations, so it is ideally used when setting up a new report.



Pressing the button gives a choice between a waterfall which will take up more space but will be easier to edit and a condensed format which uses as few rows as possible.

The Auto Layout function also adjusts the row height to ensure that the bars and milestones don’t overlap, down to a minimum row height set in the STANDARD SETTINGS sheet.

Once you have reviewed the resulting POAP, simply open the Excel file, update the names to be shown in the bars, set the formatting, and make any required adjustments to the row allocation.

Macro Security

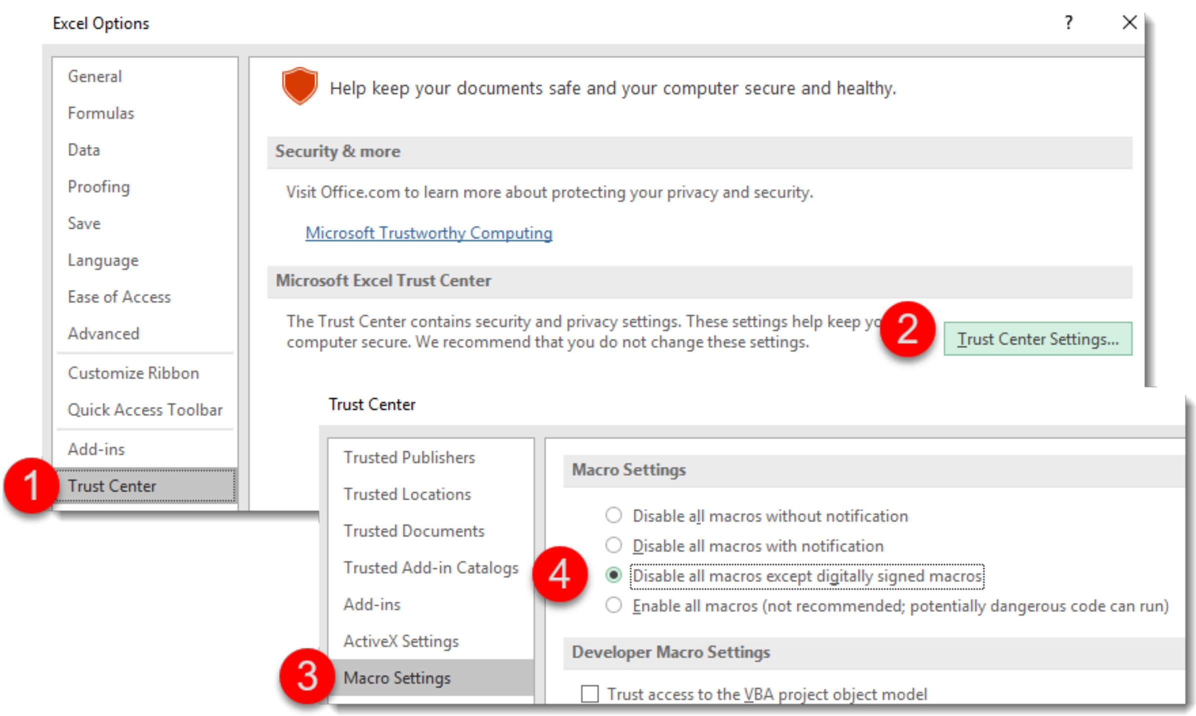
General settings in Excel

Within Excel there are four levels of security permissions for Macros:

Security level	Description
Enable all macros	This setting allows **any** macros to run as soon as a file is opened. This includes potentially dangerous code which could be attached to the Open event of the workbook, so beware!
Disable all macros except digitally signed macros	You won't be able to run any macros unless they have a trusted digital certificate attached. This is the suggested level when using SummaryPro as you should trust content from VisiPlan (see below).
Disable all macros with notification	When you open a file all the macros will be disabled, but you'll be presented with a message allowing you to enable them each time.
Disable all macros without notification	All macros will be disabled and you won't even be told why! This will prevent SummaryPro from functioning.

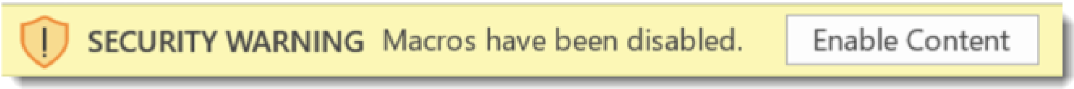
The "enable all Macros" isn't a good idea unless you're very sure of all the excel files you're running, especially if you're downloading files from the internet or opening excel sheets from emails. We recommend chooseing to allow Macros which have been signed.

You can access these settings either from the "Developer" menu (Developer / macro settings) or through the Trust Centre which is available from File / option / Trust center and clicking on the "Trust Center Settings" and then clicking on Macros.



Enabling SummaryPro to run in Excel

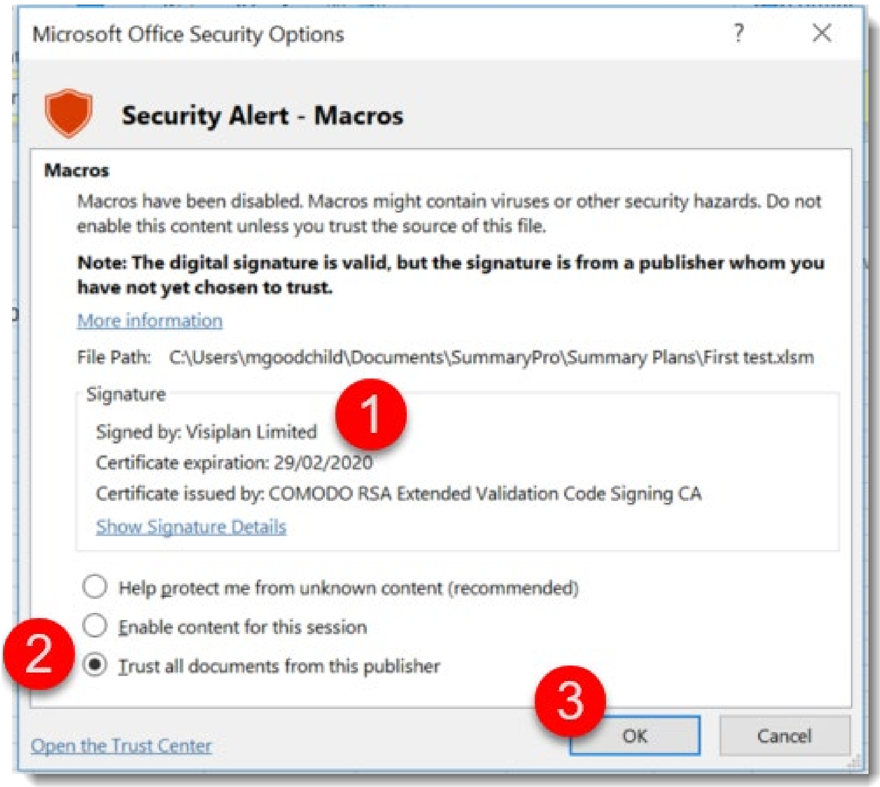
The first time that the Excel element of SummaryPro is opened a warning will be displayed (below) to alert you to the fact that the workbook contains macros. This is normal.



Simply clicking on the “Enable content” button will enable the macros and SummaryPro can function however it is better to trust all content from VisiPlan so that this warning doesn’t interrupt your work in future. This also allows you to inspect the certificate to confirm that it is OK.

To trust content from VisiPan click on the File menu, then Info on the left hand side and click on the “Enable content” button in the Security warning section and select “Advanced Options”.

This displays the “Security alert – Macros” dialogue in which you can confirm that the digital signature or code signing certificate is valid and issued by VisiPlan. You can see more details about the certificate if you click on “Show Signature Details”.

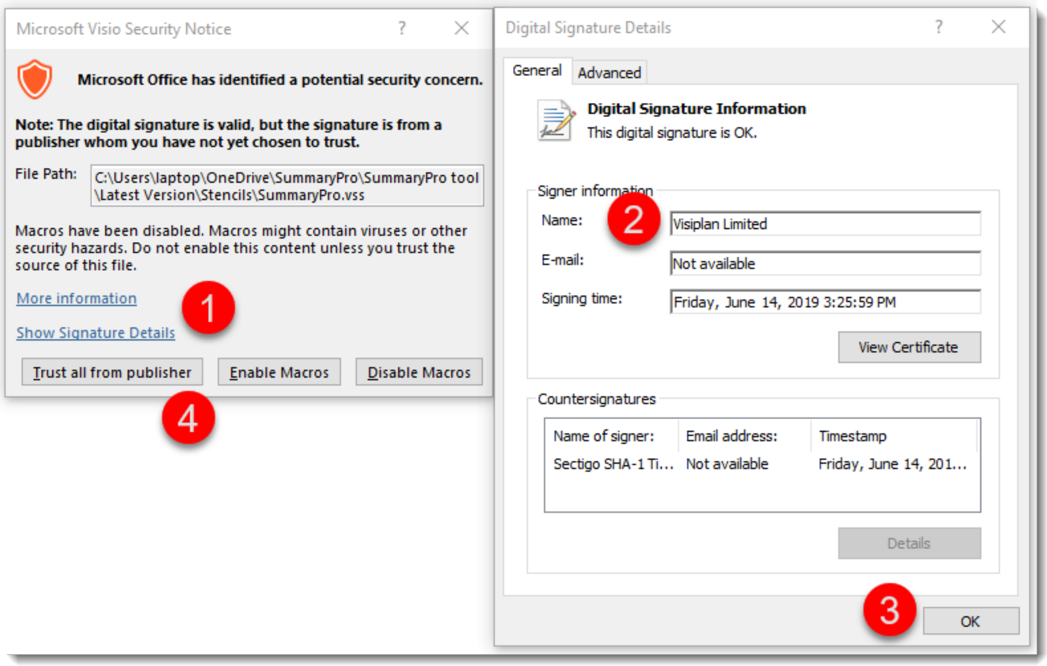


Clicking on “Trust all documents from this publisher” and OK will allow the macros vital to SummaryPro to run.

Trusting SummaryPro macro in Visio

The update macro in the Visio element of each SummaryPro pair should be trusted in a similar manner to the excel file.

- Click on the "Show signature details" in the dialogue that pops up the first time the file is opened.
- Confirm the signature is VisiPlan (old versions were signed by bVisual, a Microsoft Valued Professional which can also be trusted).
- Click on "Trust all from publisher".



What do you do in Excel and what do you do in Visio?

Most of the formatting and set up tasks are done in the Excel engine. The exceptions which are handled in Visio are:

- Transparency settings (for instance on the time curtains and major swim-lanes).
- Text formatting (typeface, size, italics etc) are handled in Visio however the colour switch between white and black for tasks and milestones is handled in Excel.
- Positioning and size of colour key boxes and the floating timescales.
- Moving item in front of other items (for instance it may sometimes be necessary to bring a milestone in front of a task bar).
- Obviously the application of comment boxes is solely in Visio.

Fault finding, causes of errors and their resolution

A task or milestone isn't displaying

Possible Cause	Check	Solution
Its date falls outside the report's timescale.	Compare the start and finish dates with those entered on the Standard Settings sheet.	Assuming the dates of the item and the report are correct then this is expected. This makes changing the date period for the report easy.
You haven't selected the item to be displayed.	Look down the "display" column in the BAR DETAILS sheet – if there is an amber box, then the data is available in the import sheet, however, you haven't chosen to display it.	Enter y in the "Display" column.
The data isn't present in the DATES AND BARS IMPORT sheet.	In The "Display" column in the Bar Details sheet if you have entered a "y" then the cell will display red.	Check the source plan to ensure that the reference is displayed and will be copied across to the SummaryPro excel engine.
The item doesn't have an assigned row.	The task or milestone maybe displayed at an odd location. Check the "Visio Row" column entry for the item on the BAR DETAILS sheet.	Enter a valid row in the "Visio Row" column to tell SummaryPro where to place the task or milestone.
It may be hidden by another item.	Move items on the same row / date around to see if your missing item is being hidden.	Move the item to a new row on the Bar details sheet or adjust which bar is in front using the "bring to front" functionality in Visio (this will be a permanent change impacting future reports so use with care.
The shape could have been deleted by accident (never delete shapes on purpose!).	Use "Find" - <CTRL><F> and enter the item number surrounded by T for tasks, R for Rag and P for progress bars. Thus the task bar for reference 100 would be T100T.. Select "Shape data" and click Find Next. If your shape isn't found, it has been deleted.	See section below.

An item has been deleted

There are various options:

1) If you have only just deleted undo (<CTRL><Z>) until it comes back.
2) Shut the Visio without saving and re-open. This has the negative effect of losing all work done in the session however if the shape was deleted in this session it will now be back. If

you have done a lot of work, you could save your work with a new name and then re-open the original and copy comments etc across. Note that you must not copy shapes, milestones, timescale etc which are updated by SummaryPro.

3) Rebuild from an original copy of the SummaryPro Visio file which has not had the shape deleted.
4) If none of the above are suitable you can manually replace the item by:
   - Ensure that the matching Excel file is closed.
   - Work out what reference has been deleted (e.g shape T12T- in the shape data).
   - Select a shape with a close reference (e.g T11T-).
   - Copy and paste this shape. This will display a dialogue asking you to link the shape.
   - Select the matching excel file.
   - Select the missing shape, in this example T12T-. You will see why it is suggested to select a shape which is close to the reference number as there will be less scrolling around.
   - Hit enter and the newly linked shape will jump to the correct location.

A task is sitting on the boundary between swim lanes

This happens with the item has been assigned the same row number as a major or minor division. This is flagged by an amber fill on both the swim lane row and the item's row number in the "Visio Row" column of the BAR DETAILS sheet. Either choose another row or add a row.

The % complete bar isn't showing.

Possible Cause	Check	Solution
The % complete has been hidden by another item.	Move items on the same row / date around to see if your missing item is being hidden.	Move the item to a new row on the Bar details sheet or adjust which bar is in front using the "bring to front" functionality in Visio. However, this will be a permanent change impacting future reports so should be used with care.
You haven't asked for % complete to be shown.	Check the "Hide rag / progress bars" setting on the STANDARD SETTINGS sheet.	Ensure that this is set to "n".
The % complete layer in Visio has been set to "hidden".	In Visio display the layers properties by Home / Editing / Layers / layer properties. There should be a check mark against the layer "Progress Bars" in the "Visible" and "Print" columns.	If this is not the case correct this and click OK.
The data isn't present in the DATES AND BARS IMPORT sheet.	Check that the data is displayed in the % complete column (H) on the Dates and	Ensure the source plan is outputting the correctly formatted % complete.

Possible Cause	Check	Solution
	Bars import sheet and that the entries are numbers.	

The % complete bar doesn't seem to show the right picture

If when you look at the Summary Plan the % complete doesn't "look right", i.e. you believe that an item should be on track however it is showing behind or ahead of the status line.

Possible Cause	Check	Solution
The plan hasn't been updated.	The source plan has been updated, and the data has been correctly copied into SummaryPro.	Update and check that the transfer of data has been successful.
The status date is wrong or hasn't been updated.	The status date entry on the DATES AND BARS IMPORT sheet is correct and is a number.	Correct the status date if required.
Only first and last items selected.	If more than one item is tagged with a reference SummaryPro will produce a bar stretching from the earliest to the latest date. However if there are tasks between these points which are not tagged they can't contribute to the % complete calculation.	Ensure that all items in the source plan which make up the displayed bar in SummaryPro are selected. In this way the work completed will be more accurate.
Front or back loading	If a bar is made up of many items at the back of the time period and a longer item then the % complete calculation will be skewed so that progress appears to be behind schedule.	This is harder to manage and may simply need an explanatory note on the Summary Plan.

If these solutions are insufficient it is possible to switch off the % complete (as shown in section "Displaying % complete" on page 28).

The Plan on a Page doesn't appear to have updated at all

If there are issues with the inputting date or settings, then SummaryPro will fail to run all the required calculation and the summary plan will not update. If this appears to have happened check that this is the case by removing all "y" from the "Display" column on the Bar Details sheet. If all the bars and milestones fail to disappear then this is the situation.

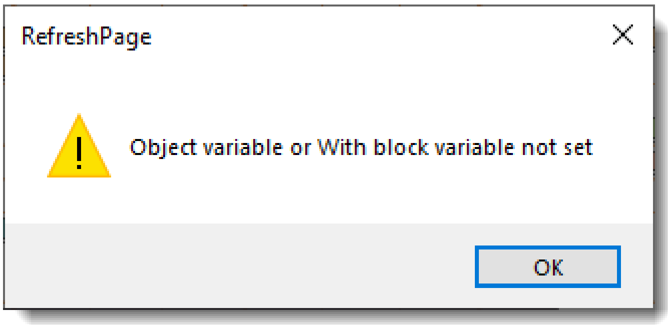
To fix the situation you need to check what has caused the calculations to fail – check for:

- Check for red flags on the BAR DETAILS.

- Check for error messages and red flags on Data and Bars Import sheet and Dependencies Import sheet.
- Ensure there are no errors, especially around dates and timescales, on the Standard settings sheet.
- Ensure that two swim lanes are not next to each other on the Bar details sheet.

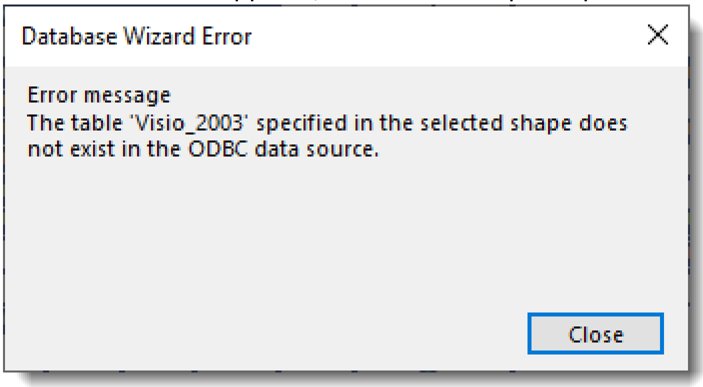
If all the data appears to be OK and no flags are showing, attempt to move the data into a fresh sheet and rebuild the report. If this still fails, please get in touch using the various support options, and we can assist you in identifying the issue.

Error message when updating Visio file



The Visio and Excel file names are different if the following error appears. Select both files and press F2, and type in the correct name. This will simultaneously rename both files with matching file names. Windows will ensure that the file extensions are correct, so you don't need to add these.

If the error below appears, there are a couple of possible reasons. 1) the Excel file is already open (this will cause a long delay between refreshing and the error appearing). Close the Excel file and re-do the refresh. 2) The Excel file is unavailable; this can be caused by the file still saving or an update to Excel running. A less common reason is 3) the file name and file path exceed 123 characters (including spaces). This is a limit within Visio and will need the folder names, path or file names to be shorter. In addition to the error message, you will also see a truncated version of the file name displayed alongside the original file as confirmation of the cause of the error.



Red text on the Importing sheets

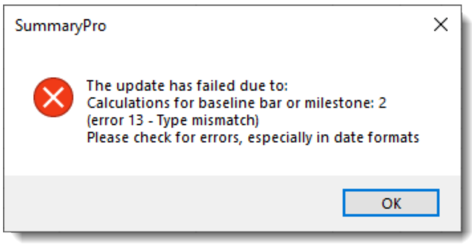
If red text is showing in either of the data import sheets (Dates and Bars Import sheet or Dependencies Import sheet), this indicates that the highlighted data is not in the correct format:

- Dates should be in a format that Excel can see as a number – use the ISNUMBER formula pointing to that specific cell to see this.
- Milestones should be shown with "yes" or "no" or blank

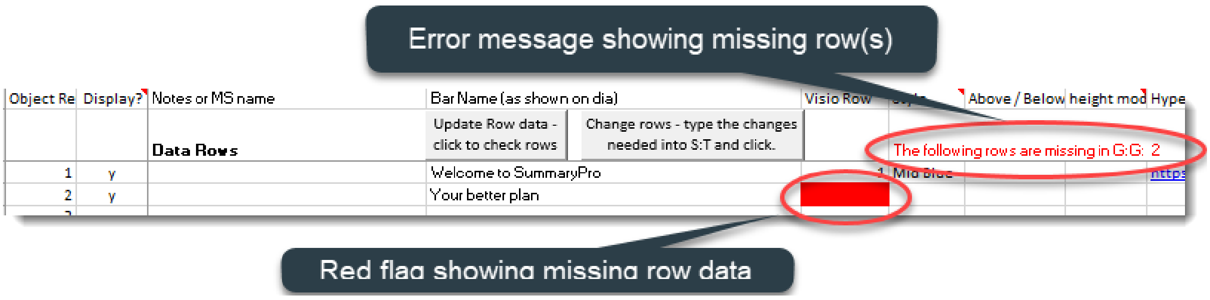
Note that if a date appears to be in the right format but is still showing red first try clicking the update button again to re-apply the formatting. If it is still showing an error it maybe that the data has been subject to "cut and paste" in which case use the "Rebuild to fix Cut Error" in Dependencies Import or "Fix cut and paste error – rebuild calculations" button in the Dates and bars import sheet.

The “update successful” dialogue doesn’t display when closing

If a data error has been missed SummaryPro may fail to complete all the calculations required to update the Plan on a Page summary. If this occurs the “successful update” dialogue will be replaced with an error dialogue providing details of the source of the data error.



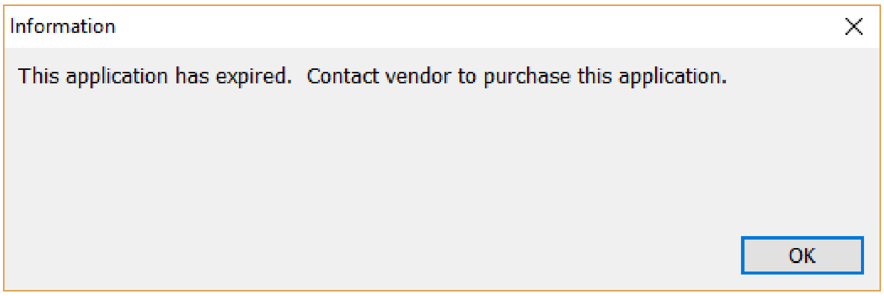
Use this to track down the source by looking for red text or error messages on the various sheets. In this instance the error could have been either in the input date for item 2 or in the row designation for item 2. Looking in the Bar Details sheet shows the error was driven by a gap in the row structure:



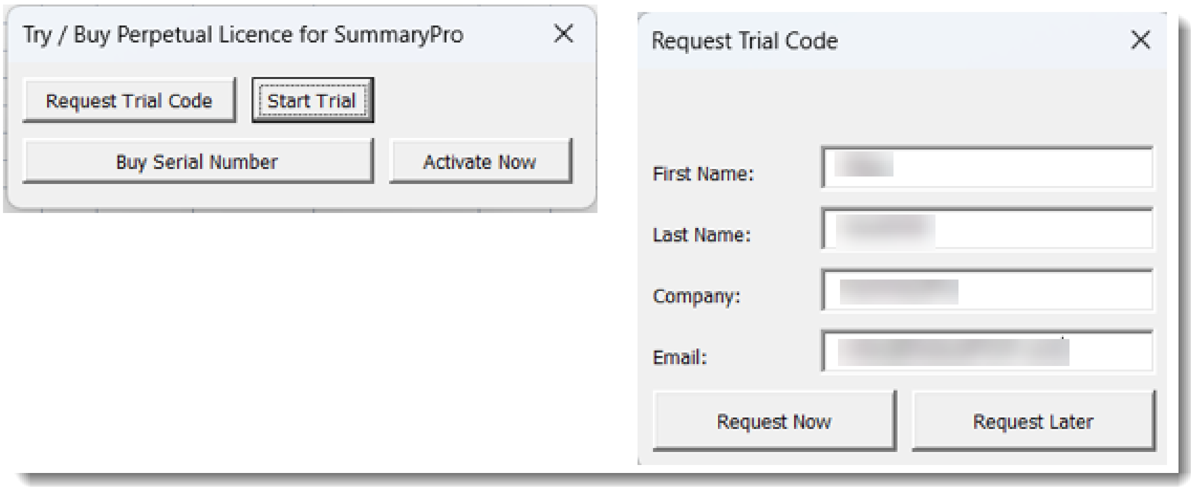
Licencing

End of trial

When the free trial runs out (after 21 days) the dialogue below will display. Clicking on the OK button will close the Excel file as the SummaryPro trial is over. If you want to continue using the Summary Plans, please purchase either a monthly subscription or pay a one-time payment for a perpetual licence from our website: https://www.summarypro.co.uk/buy. .

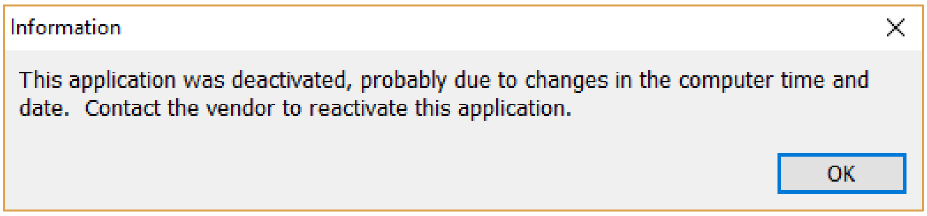


After buying the licence, when you next open a SummaryPro excel file you will be prompted to activate SummaryPro using the serial number we emailed to you:



Note that you must include the dashes between the sets of numbers. Your Summary Plans are now available for use again.

Just a side note: Attempting to extend the trial by playing with your system clock will immediately cause it to come to an end with the message below. This will hasten the need to buy a licence, so it is not recommended!

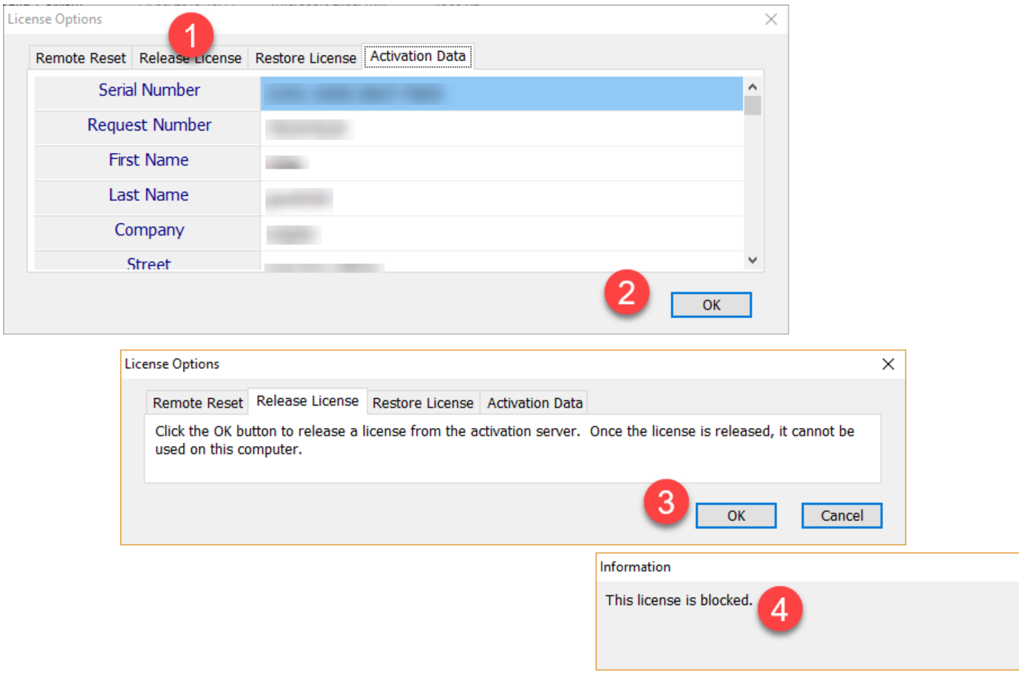


Moving the SummaryPro licence to a new machine

SummaryPro is licenced to a specific machine; however, if you need to move it to another machine, this is simple.

- Ensure all copies of SummaryPro are closed on the machine.

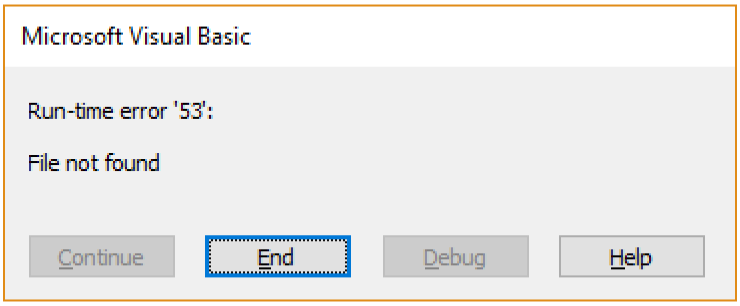
- Before double-clicking on a SummaryPro Excel engine to open it, press and hold the Shift and Command or Window key (<Shift><Win>) and keep them pressed until the “Licence Options” dialogue box is displayed.
- Choose the Release options tab and click OK. This releases the licence from the computer.



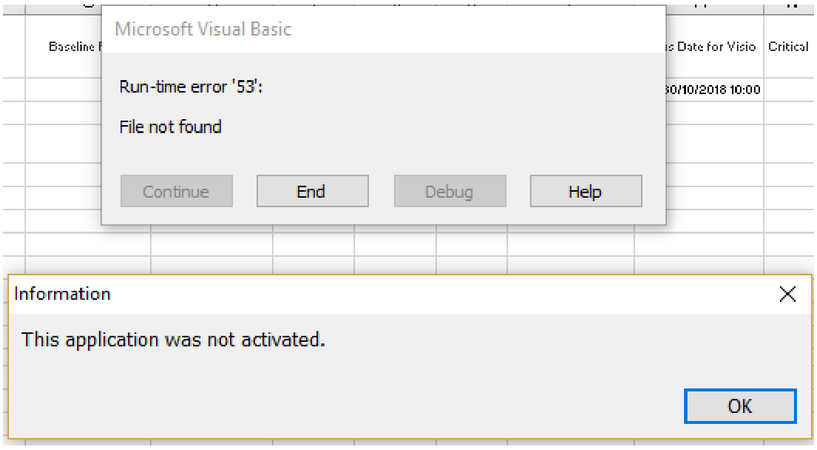
- You are now free to use the same licence number on a different machine.
- If you need to re-apply the licence to this machine simply repeat the <shift><win> when opening the file and choose “restore licence”.

Attempting to open SummaryPro without a valid licence

If you attempt to open SummaryPro without a valid licence the following error will display:



If this happens after you have attempted to activate SummaryPro (as in the example below), the most likely reason is that you made an error when entering the Licence number.



Note that the number must be entered with the dashes / hyphens between the numbers, exactly as shown in the licencing email.

Cancelling my licence

You can't cancel a One Time Payment licence and a trial doesn't need to be cancelled; it will simply run out after 21 days.

We use PayPal to handle subscription payments so you need to log into your PayPal account and follow the instructions (source: PayPal). Your subscriptions can be cancelled at any time.

1. Go to Settings.
2. Click Payments.
3. Under 'Pre-approved payments', click Manage pre-approved payments.
4. Use the filter to select the seller whose agreement you want to cancel and click Cancel.
5. Click Cancel Profile to confirm your request.

After cancelling your licence will cease to work and your copy or copies of SummaryPro will become inactive and you will be unable to open the Excel engines.

We would very much like to understand what led you to cancel your subscription with SummaryPro, not least to understand how we can improve it – if you're happy to give some brief feedback please contact us on support@SummaryPro.co.uk.

Adding more machines / licences

If you would like to add more machines and licences please either buy a new licence covering the required number or additional machines or contact us on sales@SummaryPro.co.uk to arrange for additional capacity to be added to your licence.

Detailed contents