SharePoint Project Progress Monitor Tutorial

SharePoint Project Progress Monitor is a new column type that adds a graphical component to standard SharePoint percentage data columns. This added functionality improves the usability of the SharePoint percentage data column by making it more user-friendly and intuitive. Two-way conversion between raw numerical data and color-coded progress bars makes it easy to use SharePoint Project Progress Monitor on already existing lists as well.

To use SharePoint Project Progress Monitor, you first have to set up a SharePoint Project Progress Monitor Column. To do this, open the Settings menu in SharePoint and click on Create Column.
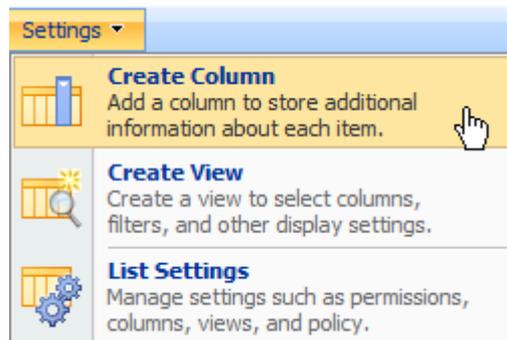

Figure 1: Add a SharePoint Project Progress Monitor column from the Settings Menu in SharePoint

Once the Create Column page opens, select Project Progress Column.

Figure 2: Select Project Progress Column in the SharePoint Column Information Type list

Additional Column Settings
Specify detailed options for the type of information you selected.

Click here to manage license for Project Progress Monitor 1.0.625.0

Description:

Require that this column contains information:
○ Yes ◉ No

Detailed value limit settings (optional):

Specify a minimum and maximum allowed value:
Min: [   ] % Max: [   ] %

Number of decimal places:
[Automatic ▼]

Default value:
[   ] %

Detailed style settings:

Width: [100   ] Pixels
Foreground Color: [SkyBlue   ▼]
Background Color: [White   ▼]
Text Align: [Right ▼]
Preview (e.g. 50%): [▬▬▬   ] 50%

Click here to use default style

Column Type Conversion:
☐ Convert percentage data from another column

☑ Add to default view

OK   Cancel

Figure 3: Additional Column Settings allows you to vividly and graphically display percentage data as a progress bar

In the Additional Column Settings section, customize the appearance of the graphical display and set up the number format: select the foreground color and background color, determine the width of the bar, and align the text. After customizing SharePoint Project Progress Monitor's features according to your preferences, a preview will be displayed so you can preview the progress bar's final appearance.

Specifying limit values and number of decimal places allows you to set the number format according to your requirements. So if you need very accurate data, you simply increase the amount of decimal places.

One of the most useful features of SharePoint Project Progress Monitor is its ability to convert other SharePoint column Types into the Project Progress Monitor column

type. Just select the column you want to convert, and click Convert when you are done. Please keep in mind that this will only work for SharePoint Percentage Data column types.
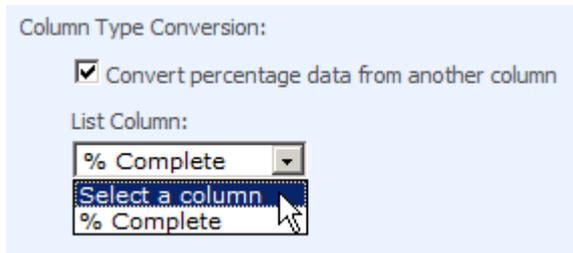

Figure 4: With SharePoint Project Progress Monitor you can convert other column types into the Project Progress Monitor column type
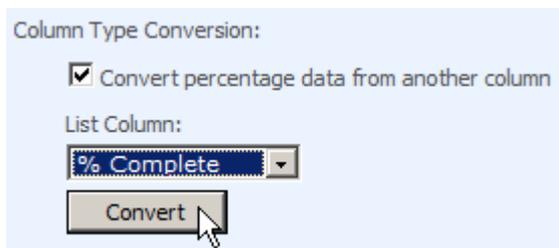

Figure 5: Convert other SharePoint column types into percentage data

Once you have finished the set up of the Project Progress Monitor column, you can start using it. To do so, just create a new item in your list. You will find a Project Progress Monitor input field in the New Item form. Just enter a valid number and click OK.

Figure 6: Monitor Project Progress with SharePoint Progress Monitor after creating a task

After that the percentage will be displayed in the percentage bar. It will also appear as a number next to the column. You can change the settings of the columns in the Additional Column Settings menu as described above.

Once all the list items have been created, you can quickly and easily see which task has been finished and to what extent. This greatly improves your ability to monitor the progress in SharePoint project based environments.

Title	Milestone	Assigned To	Start Date	Status	Due Date	Project Progress Monitor
Design Protype	No	James White	6/23/2009	Completed	7/7/2009	100%
Design Product Tests	No	Mary Johnson	6/23/2009	Completed	6/30/2009	100%
Rough Product Design	No	Peter Anderson	6/30/2009	Completed	7/7/2009	100%
Final Features Prototype	Yes	Daniel Lopez	7/7/2009	Completed	7/14/2009	100%
Packaging Design	No	Peter Anderson	7/14/2009	In Progress	7/21/2009	50%
Final Product Name	No	Catherine Brown	7/14/2009	Completed	7/21/2009	100%
Run Product Tests	No	Ashley Davis	7/14/2009	In Progress	7/28/2009	70%
Rough Product	No	Daniel Lopez	7/14/2009	Completed	7/21/2009	100%
Fix Problem Issues	No	Mary Johnson	7/14/2009	In Progress	7/28/2009	90%
Final Product	Yes	Daniel Lopez	7/21/2009	In Progress	7/28/2009	80%
Write How To Use	No	Ashley Davis	7/28/2009	Waiting on someone else	7/31/2009	0%
Product Description	No	Catherine Brown	7/28/2009	Waiting on someone else	7/31/2009	0%
Write Press Releases	No	Madison Taylor	7/28/2009	Not Started	7/31/2009	0%
Write Magazine Ads	No	Isabella Garcia	7/28/2009	Not Started	7/31/2009	0%
Inform Partners	No	Catherine Brown	7/28/2009	Not Started	7/31/2009	0%
Approve Release	Yes	Michael Peters	7/31/2009	Waiting on someone else	7/31/2009	0%

Figure 7: Display project progress with vivid graphic bar with SharePoint Project Progress Monitor

When editing the data in the Worksheet View, the Project Progress Monitor data is automatically displayed as percentage data.

Title	Milestone	Assigned To	Start Date	Status	Due Date	Project Progress Monitor
Design Protype	☐	James White	6/23/2009	Completed	7/7/2009	100%
Design Product Tests	☐	Mary Johnson	6/23/2009	Completed	6/30/2009	100%
Rough Product Design	☐	Peter Anderson	6/30/2009	Completed	7/7/2009	100%
Final Features Prototype	☑	Daniel Lopez	7/7/2009	Completed	7/14/2009	100%
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Final Product Name	☐	Catherine Brown	7/14/2009	Completed	7/21/2009	100%
Run Product Tests	☐	Ashley Davis	7/14/2009	In Progress	7/28/2009	70%
Rough Product	☐	Daniel Lopez	7/14/2009	Completed	7/21/2009	100%
Fix Problem Issues	☐	Mary Johnson	7/14/2009	In Progress	7/28/2009	90%
Final Product	☑	Daniel Lopez	7/21/2009	In Progress	7/28/2009	80%
Write How To Use	☐	Ashley Davis	7/28/2009	Waiting on someone else	7/31/2009	0%
Product Description	☐	Catherine Brown	7/28/2009	Waiting on someone else	7/31/2009	0%
Write Press Releases	☐	Madison Taylor	7/28/2009	Not Started	7/31/2009	0%
Write Magazine Ads	☐	Isabella Garcia	7/28/2009	Not Started	7/31/2009	0%
Inform Partners	☐	Catherine Brown	7/28/2009	Not Started	7/31/2009	0%
Approve Release	☑	Michael Peters	7/31/2009	Waiting on someone else	7/31/2009	0%

Figure 8: Automatically display as percentage data when data is edited