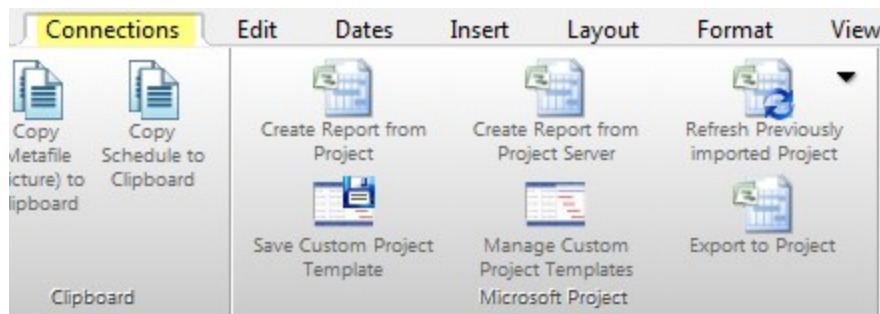


Successfully Create Presentation Reports for Microsoft Office Project

Transform your Microsoft Project schedules into executive-level presentation reports with Milestones software.



KIDASA Software's Milestones Professional offers a direct interface to Microsoft Project, making it easy to generate presentation report formats beyond the standard formats offered by Microsoft Project. In the following pages, you'll learn how to:

CREATE Use the Project to Milestones Wizard to create presentation reports for Microsoft Project, choosing from more than 70 built-in presentation formats.

CUSTOMIZE Is one of the 70+ formats almost perfect? Customize it, make it perfect and add it to your Milestones Project Wizard as a custom project template.

BUILD IT YOUR WAY Do you have a unique presentation format? Design and build it "from scratch"; tag milestone symbols, and columns to let Milestones know what information you want to bring in from Microsoft Project.

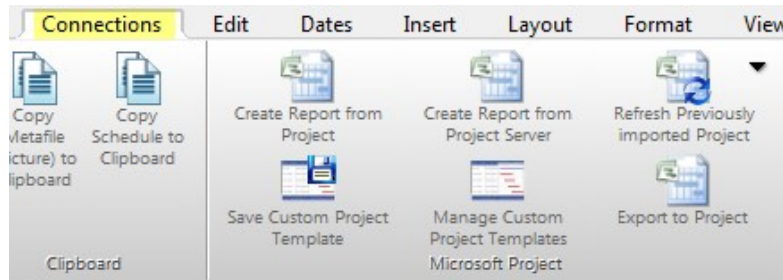
STAY UP-TO-DATE Keep all of your presentation schedules up-to-date with the latest dates and information from Microsoft Project with Milestones refresh.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Create presentation reports for Microsoft Project.

The **Connections** tab on Milestones Professional's toolbar offers easy access to all Microsoft Project options.

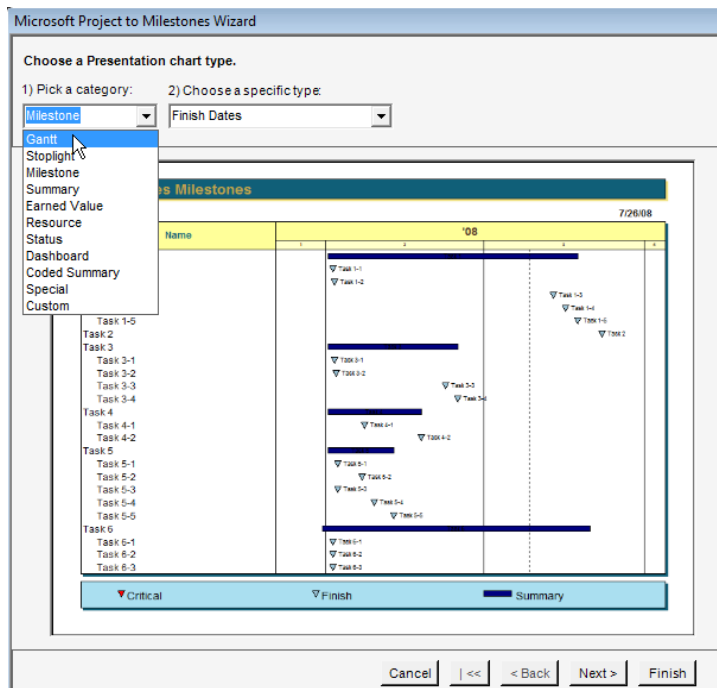
Choose **Create Report from Project** or **Create Report from Project Server** to start the Project to Milestones Wizard.



Connections Tab

The Project to Milestones Wizard offers a visual representation of the schedule as it is created, allowing you to see the effects of the formatting choices you make in a dynamically updated screen.

Start off by choosing from one of the built-in formats or use your own custom chart to begin. Follow the prompts and watch as your Microsoft Project information is brought into a professional-looking Milestones schedule.



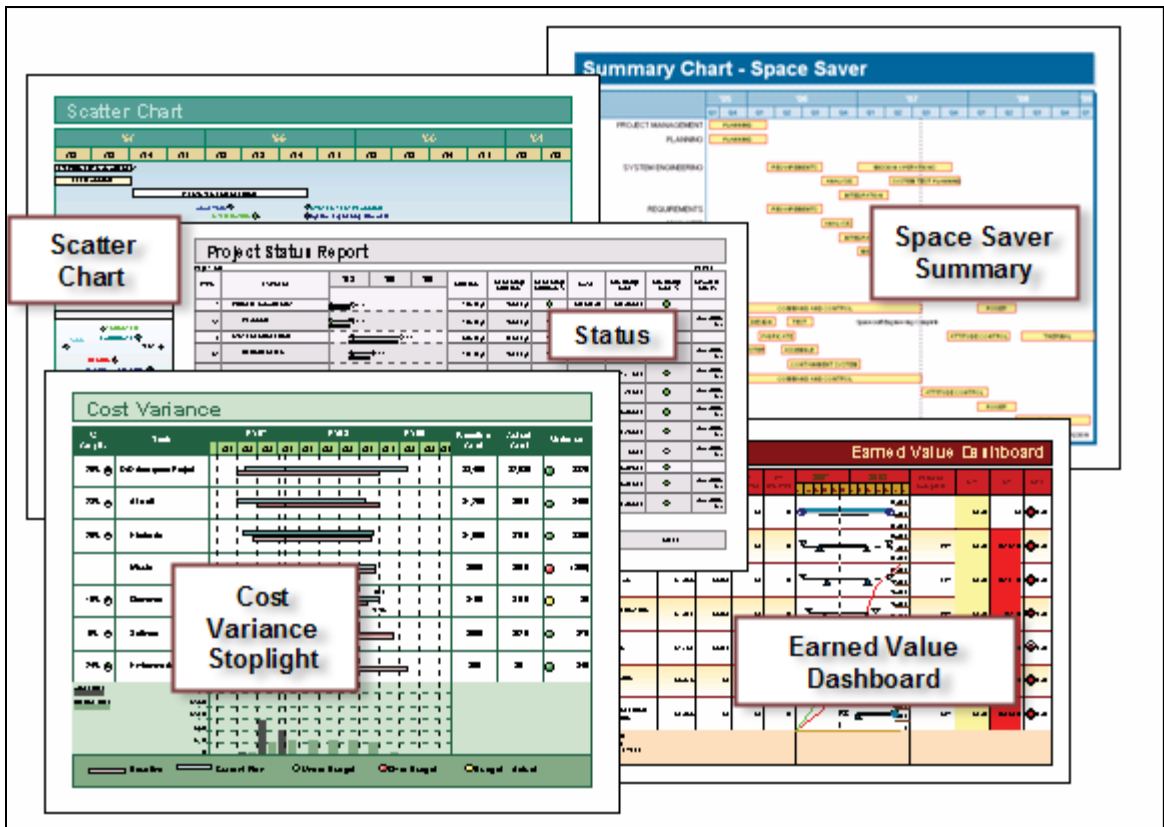
Project to Milestones Wizard

Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

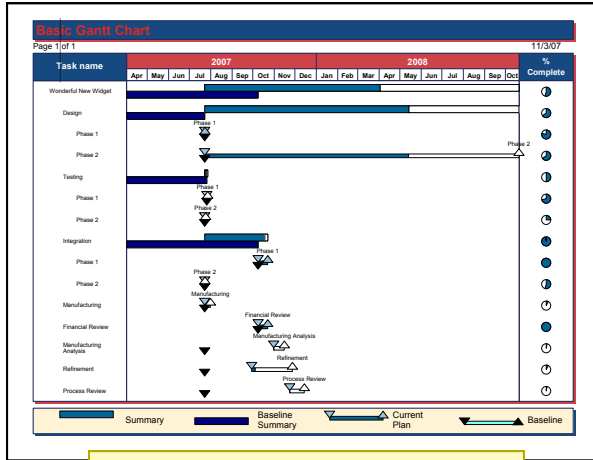
The Project to Milestones Wizard offers 11 categories:

- **Gantt** contains layouts suited to a basic Gantt schedule, including start and finish dates. The Gantt step-by-step offers the most flexibility of all of the wizard formats.
- **Stoplight** formats offer several commonly used presentation red, yellow, green stoplight charts for easy management viewing of key indicators.
- **Milestone** charts show tasks with zero duration or finish dates only.
- **Summary** charts are condensed presentation formats.
- Choose one of the **earned value** formats and show an earned value graph along with your project schedule.
- **Resource** charts show work variance, resources and other data by task, often with a graph below the schedule.
- **Status** formats display current, remaining, or slipping tasks.
- **Dashboard** charts offer several unique formats with the popular “dashboard” appearance and content.
- **Coded Summary** allows extra flexibility for the data imported by letting you code tasks in Microsoft Project.
- **Special** offers three formats which did not fall into one of the previous categories: Work remaining versus money remaining, percent complete bar graph, and finish variance.
- The **Custom** category is reserved for presentation formats you add. When you find a presentation format you like, customize it with additional columns, and change other aspects. Then add it to the custom category and it will appear on the menu.

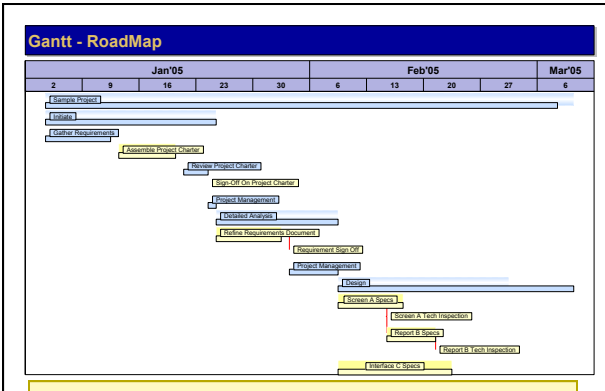
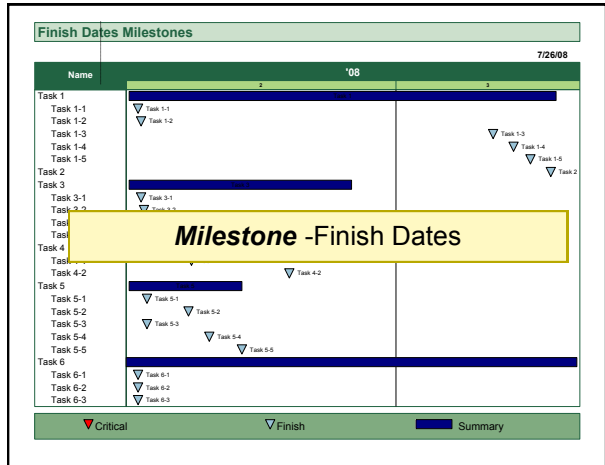


Visit www.kidasa.com/projectreports to view all of these choices.

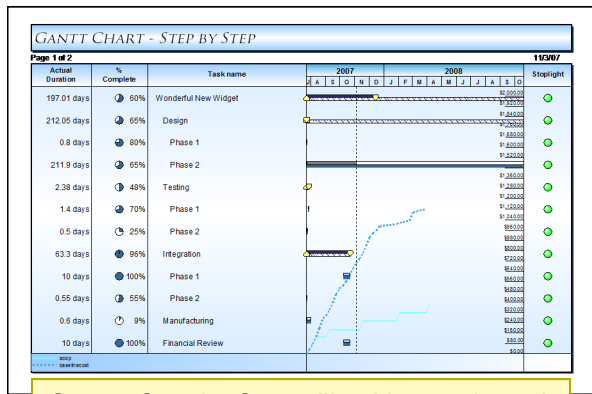
CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT



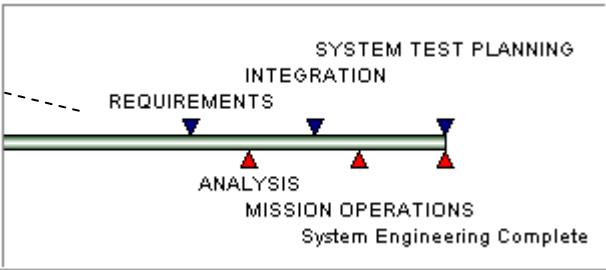
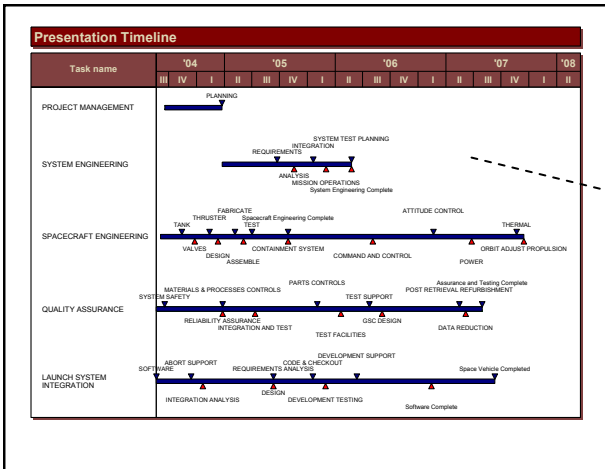
Gantt -Basic Gantt Chart



Gantt -Roadmap shows current plan plus baseline along with the task name.



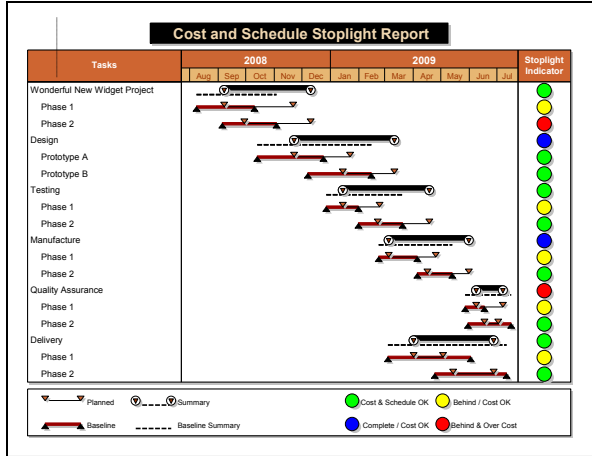
Gantt - Step by Step will guide you through building your own format by adding columns, stoplights and graphs.



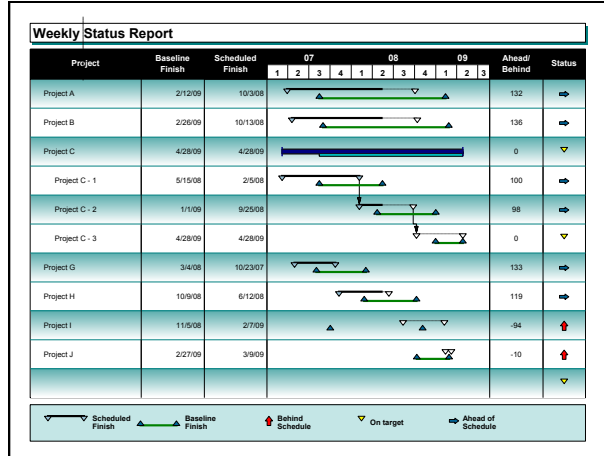
Summary - Presentation Timeline

Visit www.kidasa.com/projectreports to view all of these choices.

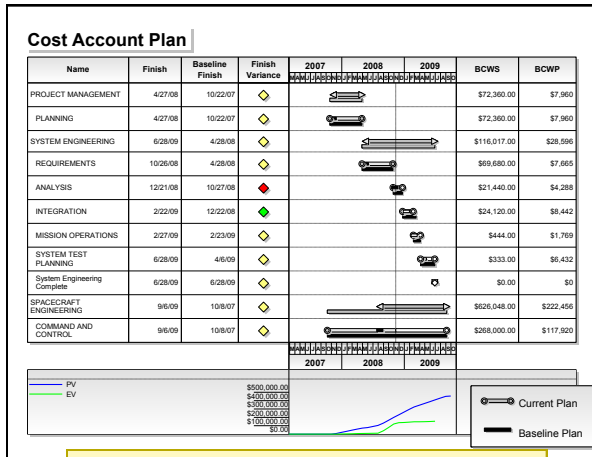
CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT



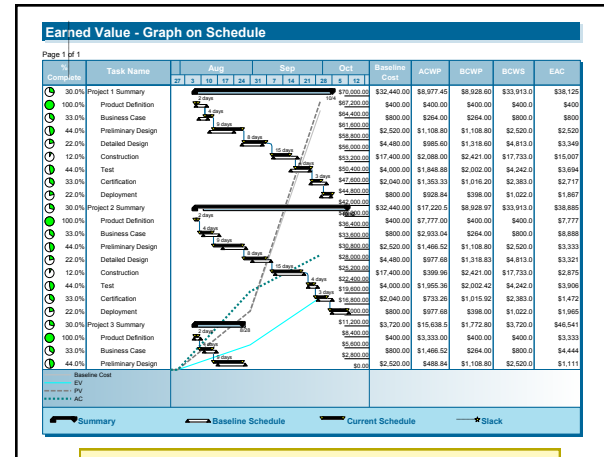
Stoplight—Cost and Schedule Report



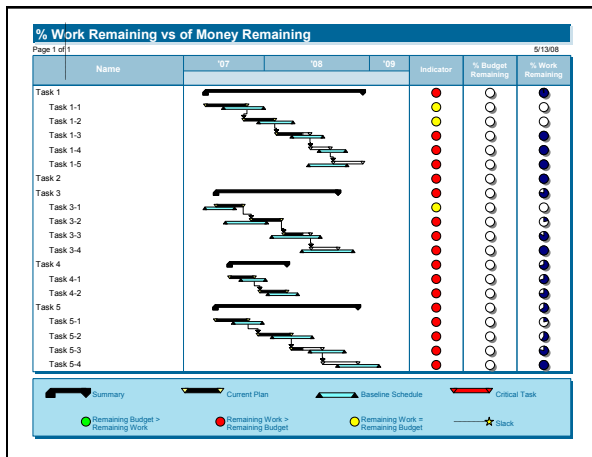
Status—Weekly Status Report



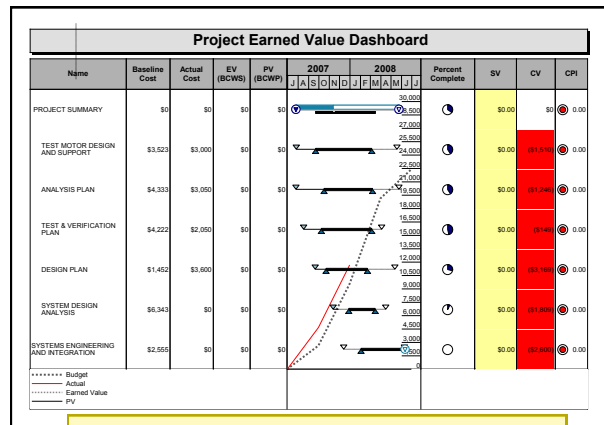
Status - Cost Account Plan



Earned Value - Graph on Schedule



Special - % Work Remaining vs of Money Remaining



Dashboard - Project Earned Value Dashboard

Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Customize project presentations with custom project templates.

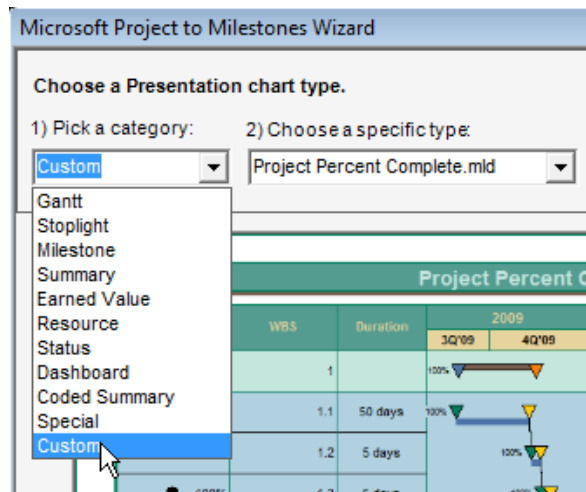
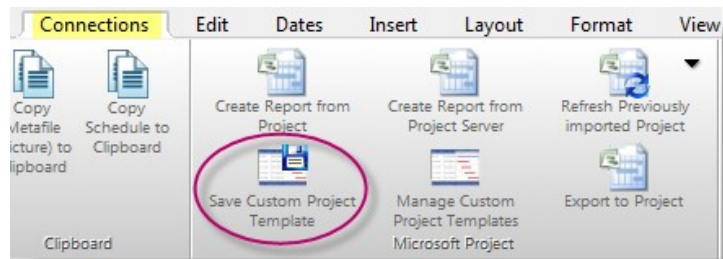
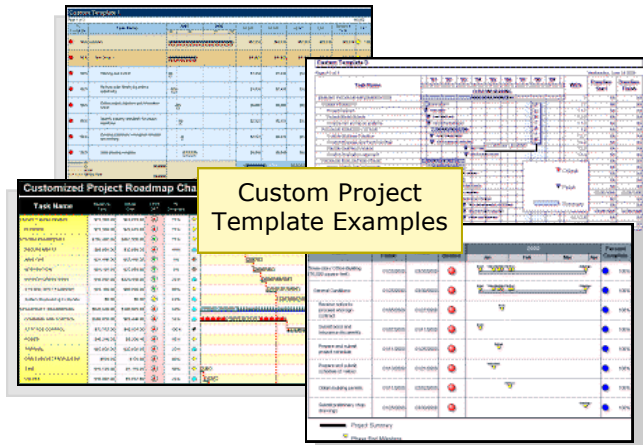
Can't find a chart format in the Project to Milestones wizard that is exactly what you need? Import one of your Microsoft Project Schedules, customize the presentation Milestones chart and save it as a **Milestones custom project template**.

1 Find a presentation format that closely meets your requirements.

2 Customize it so that it's just right for your needs.

3 Save your customized chart as a custom project template.

4 From then on, when you create your presentation charts, choose the custom presentation chart you created.



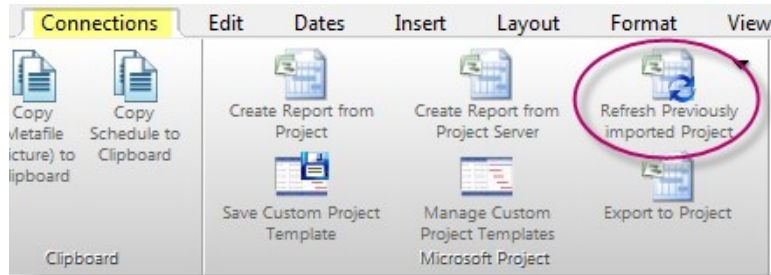
Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Stay Up To Date When Project Dates Change with “Refresh”

Refresh

"Refresh" refers to updating symbols' dates, column text, and column values in Milestones Professional with the latest information in the Microsoft Project files that were used to create the Milestones schedule. Optionally, new tasks in the Microsoft Project file are added to the end of the Milestones schedule.



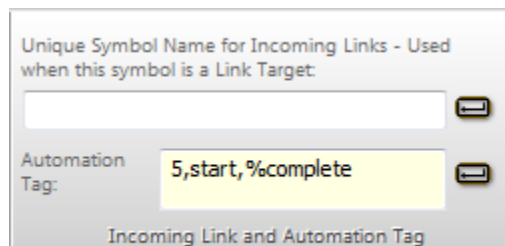
Tags

When the Milestones Project Wizard creates a presentation schedule from a Microsoft Project schedule, task start and end dates are tagged with a Unique ID (or other *unique identifier specified) from Microsoft Project and the word "start", "finish", "baselinestart", "baselinefinish", or other date type. Microsoft Project fields such as task name, percent complete, BCWP, and so on are similarly tagged on the Milestones presentation schedule.

Unique Identifiers

- * Unique ID
- * Text 1-30
- * Project Server GUID
- * WBS
- * Enterprise Text 1-40
- * Enterprise Project Text 1-40

The Picture to the right is an example of a symbol's tags. To see the symbol tags in a schedule click the symbol on the schedule. The toolbar changes to **Current Object Symbol**. Then select the **Symbol Links** tab in the **Incoming Link and Automation Tag** section and view the **Automation Tag** box.



During the refresh process, tagged items in Milestones are matched to their counterparts in the selected Microsoft Project file. All tagged items are replaced with the latest data from the Microsoft Project file.

Thus, if a start date changes in the Microsoft Project file, refresh will update that same start date in the Milestones schedule.

Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Refresh Example

Initial Import

	% Complete	Resource Initials	Task Name	Start	Finish	Unique ID
1	67%	JJ,DE,SB	Task 1	Fri 8/15/08	Mon 8/18/08	1
2	60%	CW,DE,JJ	Task 2	Mon 8/18/08	Wed 8/20/08	2
3	44%	DD,EE	Task 3	Thu 8/21/08	Wed 8/27/08	3
4	50%	AW	Task 1	Tue 8/26/08	Wed 8/27/08	4
5	25%	WF,DD	Task 2	Wed 8/27/08	Thu 8/28/08	5
6	25%	CD,EL,CW	Task 3	Thu 8/28/08	Thu 9/4/08	6

Microsoft Project File

Original Presentation Schedule

August					September			% Comp.
3	10	17	24	31	7	14	21	
Task 1 JJ,DE,SB								
Task 2 CW,DE,JJ								
Task 3 DD,EE								
Task 4 AW								
Task 5 WF,DD								
Task 6 CD,EL,CW								

The Milestones presentation chart to the right was created from the Microsoft Project file above.

Milestones Presentation Chart

Refresh Process

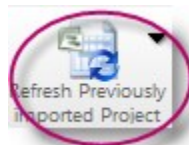
	% Complete	Resource Initials	Task Name	Start	Finish	Unique ID
1	100%	JJ	Task A	Fri 8/15/08	Wed 8/20/08	1
2	100%	CW	Task B	Thu 8/21/08	Fri 8/22/08	2
3	41%	DD	Task C	Mon 8/25/08	Mon 9/1/08	3
4	26%	AW	Task D	Tue 8/26/08	Fri 8/29/08	4
5	50%	WF,DD	Task E	Wed 9/3/08	Wed 9/10/08	5
6	100%	CD,EL,CW	Task F	Thu 9/11/08	Mon 9/15/08	6

Microsoft Project File Revised

Milestones Presentation Chart

August					September			% Comp.
3	10	17	24	31	7	14	21	28
Task A JJ								
Task B CW								
Task C DD								
Task D AW								
Task E WF,DD								
Task F CD,EL,CW								

When the Microsoft Project Schedule changes, choose **Refresh Previously Imported Project** on the Connections tab. Dates, and % complete are updated, along with other task name, and resource initials (shown as symbol text) in the Milestones presentation chart.

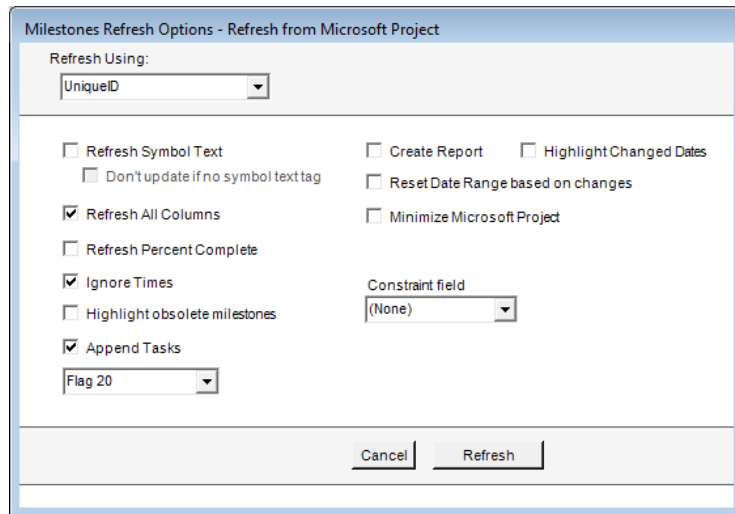


Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Refresh Options

- **Refresh Using:** If, when the Milestones schedule was created, symbols were tagged with a Microsoft Project field other than Unique ID, it's possible to select that field and use it to refresh the schedule. .
- **Refresh Symbol Text:** updates text/values attached to symbols with the source field's text/values
 - **Don't update if no symbol text tag:** use this option when you have entered symbol text in Milestones
- **Refresh All Columns:** updates column text/values with the source field's text/values
- **Refresh Percent Complete:** updates each status symbol, according to the latest percent complete values. The status symbol controls the fill-to-status for connectors and symbols.
- **Ignore times:** Do not update the time when updating the date. Only change the date of the symbol.
- **Highlight obsolete milestones:** Symbols in the Milestones schedule which are no longer in the Microsoft Project file will change to a question mark symbol. Avoid using this option if refreshing from more than one Microsoft Project schedule.
- **Append Tasks:** Choose to add tasks to the presentation chart. Note that if a number of tasks have been added in the Microsoft Project schedule, re-importing is usually best.
 - **Flag:** If you choose to append tasks, Milestones uses a flag filed during the refresh function. Make sure the flag in the drop-down box menu is an unused flag field in your Microsoft Project file
- **Create Report:** generates a report of fields which were updated. Report is both placed 1) on the clipboard and 2) saved to the user's My Documents folder. The name of the report is milesrefreshfile. (milesrefreshfile.txt)
- **Highlight changed dates:** causes any dates which are changed during the refresh process to be highlighted. Once highlighted, it's possible to toggle the display on and off by checking or unchecking the Refresh Highlighting option on the Connections tab (Other section).
- **Reset Date Range based on changes:** Check this if the date range (start/end dates) of the Milestones chart should be changed to reflect the changes made during the refresh process. If this option is not checked, the schedule's date range will not be changed and new dates might not be visible if they are outside the date range.
- **Minimize Microsoft Project:** Minimizes the Microsoft Project window during the refresh process.
- **Constraint Field:** Add Constraints to symbols in your schedule. First choose the date field in MS Project that holds the constraint date. The **Constraint type** and **Add constraint to this** boxes will appear. Now the selection of a constraint type and to what date field the constraint will be applied can occur.



Please refer to the Appendix at the end of this document for additional details about the refresh process.

[Visit www.kidasa.com/projectreports](http://www.kidasa.com/projectreports) to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Build a "Free Form" Presentation Schedule

[Link it to Microsoft Project schedules and keep it updated](#)

Do you have a unique presentation format? Do you have one or more Microsoft Project schedules which you need to present at once?

It's possible to design a presentation chart "free-form" and link it to your Microsoft Project schedules for future updates.

Schedules like the one below, sometimes called visual roadmaps can be built freeform. The process involves adding dates (symbols) to the presentation Milestones schedule, and then "tagging" symbols with the Microsoft Project Unique ID (or other identifier field) followed by the name of the date field and the name of the field to be used for symbol text. Once built and tagged, you can use Milestones refresh to keep your schedule up-to-date whenever your Microsoft Project schedule changes.

A symbol is "tagged" in the following general format: Identifier, Date Type, Symbol Text Field. In the example below, the Microsoft Project UniqueID field is used for the Identifier. The three symbols shown in the illustration are finish date symbols, so they are tagged with a date type of "finish". Last, since the task name is used to label the milestone, the Microsoft Project name field is the final parameter in the symbol tag.

Task Name	Duration	Finish	Unique ID
Project 1	4 days	Tue 8/5/08	1
Task 1-1	2 days	Fri 8/1/08	2
Task 1-2	2 days	Tue 8/5/08	3
Project 2	4.5 days	Tue 8/12/08	4
Task 2-1	2 days	Thu 8/7/08	5
Task 2-2	2.5 days	Tue 8/12/08	6
Project 3	8 days	Fri 8/22/08	7
Task 3-1	3.5 days	Fri 8/15/08	8

Symbol tag = 2,finish,name

Symbol Tag = 6,finish,name

Zoom to 100%

Turn On Dependency Mode

Copy Symbol/Bar for Paste

Delete

Font...

Select Task

Schedule Recurring Task...

Link to active MS Project Task...

Link to active MS Project Task start with unique id

Manually tagging a milestone chart is easy using the right click menu option **Link to active MS Project Task**. Once the **Link to active MS Project Task** feature has been used, Milestones will retain the previous settings chosen (the date field and the ID for tag) and allow you to link symbols similarly. The option below **Link to active MS Project Task** retains the last link options chosen.

Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

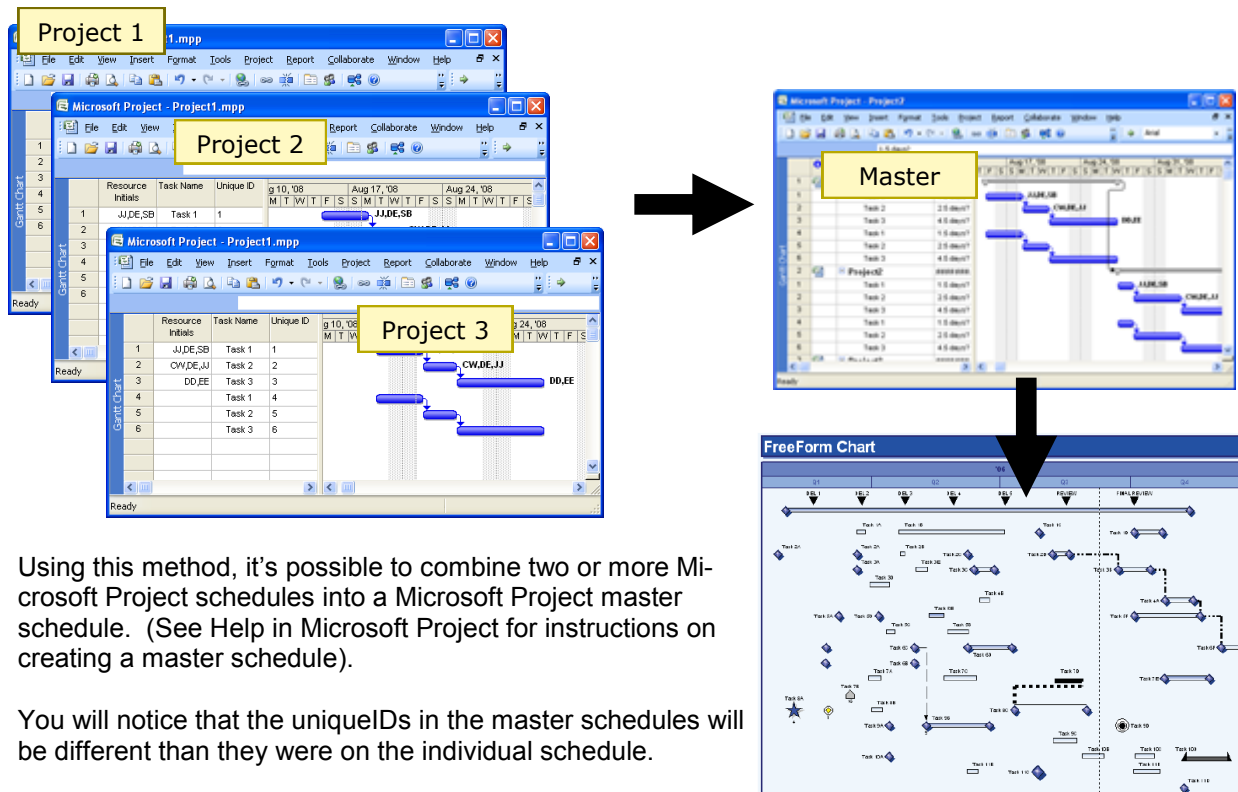
Update from multiple Microsoft Project schedules

Option 1: Use a Microsoft Project Master Schedule

If you have multiple Microsoft Project schedules, one option for bringing them into Milestones and keeping your Milestones presentation schedule up-to-date is to use a Microsoft Project master schedule.

When multiple Microsoft Project schedules are combined and maintained into a Microsoft Project master schedule, Microsoft Project changes the Unique IDs so that the IDs are indeed unique across the combined project. Even if both Project 1 and Project 2 contain the Unique ID 10, when combined in the Microsoft Project master schedule, the new Unique IDs for Project 1 and Project 2 will be different. No two Unique IDs in the combined master schedule will conflict.

The main consideration for this method is that the schedules must be kept in the master schedule in order for this process to work.



Using this method, it's possible to combine two or more Microsoft Project schedules into a Microsoft Project master schedule. (See Help in Microsoft Project for instructions on creating a master schedule).

You will notice that the uniqueIDs in the master schedules will be different than they were on the individual schedule.

If you plan to maintain your Microsoft Project schedules in the Master Schedule format, then accomplishing the import and refresh with this method may be a good way to go.

If you plan to maintain the schedules individually and only combine them periodically, before a refresh for example, then this method may prove to be time consuming, as the UniqueIDs on the master schedule will likely change whenever you combine the schedules.

Visit www.kidasa.com/projectreports to view all of these choices.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

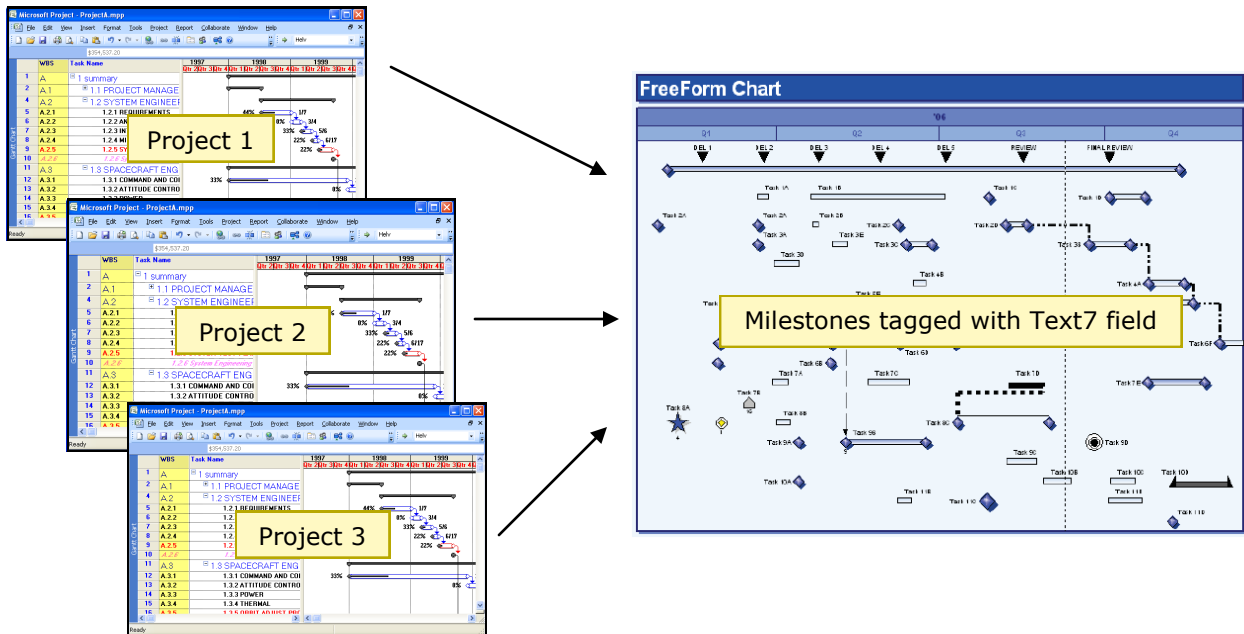
Update from multiple Microsoft Project schedules

Option 2: Use a Milestones Professional Master Schedule List

If you have a list of Microsoft Project schedules which refresh a single Milestones Professional schedule, here's a great way to keep them up to date:

Set up a Milestones Professional Master Schedule. (FreeForm Chart)

1. On the File tab, choose Master Schedule.
 2. Check the option Master Schedule List is for Microsoft Project Refresh....
 3. Click the Add Schedule button to locate and add each Microsoft Project MPP file.
- Set up the milestones on your freeform chart so that they are tagged with either a Text Field or a WBS field. This is recommended so that they can be uniquely matched to the Microsoft Project schedules.
 - Set up the Microsoft Project files so that the identifiers in the Text Field or WBS field you choose are unique across all of the schedules you choose to refresh the presentation Milestones schedule.
 - When the Milestones Professional schedule is refreshed, the saved master schedule list will be automatically used. There will be no prompt for a Microsoft Project file name.



Advantages to this method are:

- Schedules can be maintained by multiple individuals and brought together by someone who would only need “read-only” access to create the presentation chart.
- Control over numbering scheme assures guaranteed unique numbering.

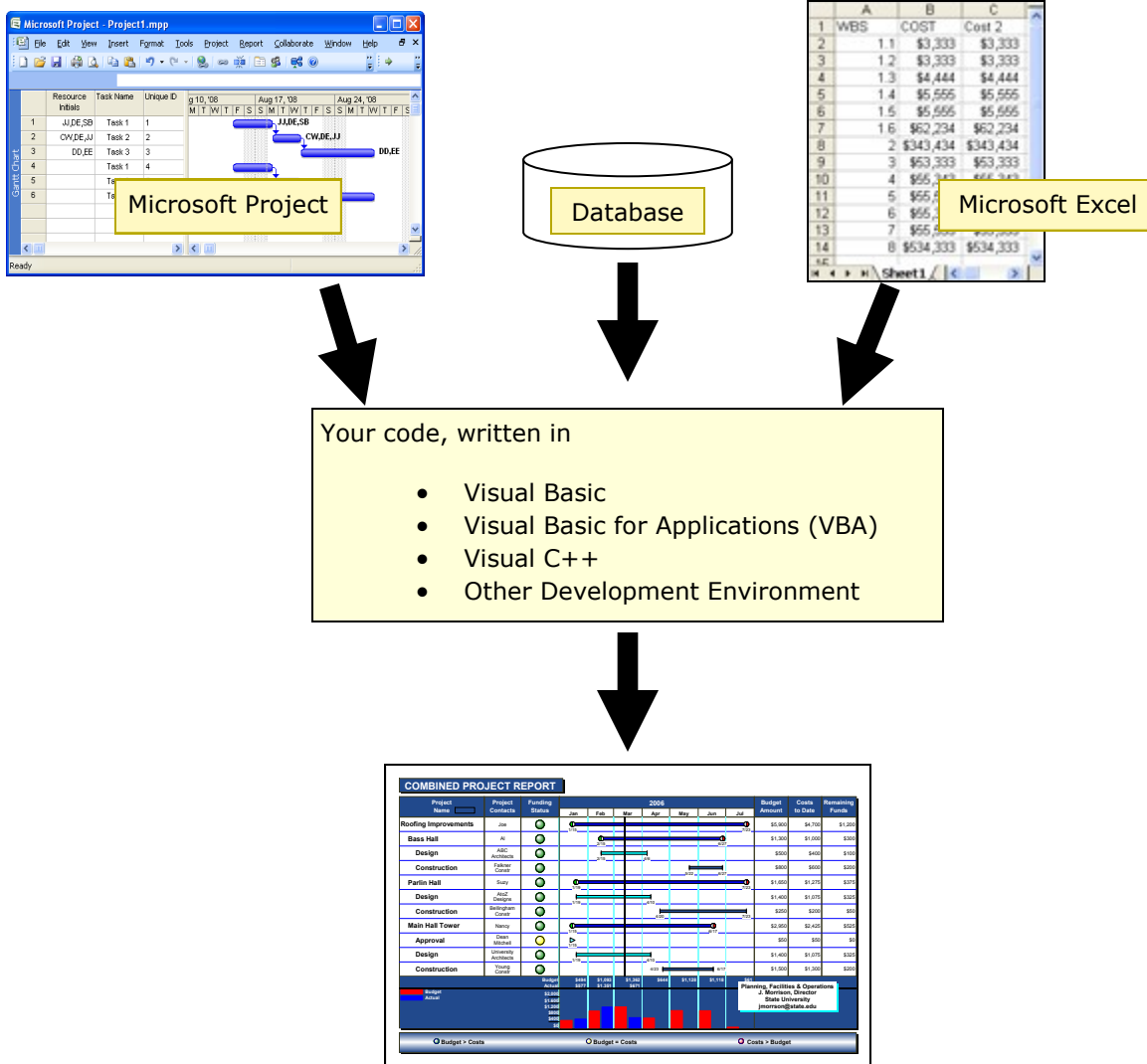
Note: For the above process it is recommended that either WBS or Text fields 1-30 are chosen as the field to be used for unique identifier.

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

Build Applications Using Milestones Professional's Automation Interface

Using OLE Automation, a program that you develop in Visual Basic can be used to automate schedule production using data from any source to which you have access.

It's possible, for example, to combine information from Microsoft Project with information from your company's financial system and produce a presentation Milestones report which includes information from these sources. Complete information is available on KIDASA Software's website. Visit: www.kidasa.com/information/programming.



LICENSING: Site and server licenses for Milestones Professional are available. Developers require only a single license for Milestones Professional.

Complete information is available on KIDASA Software's website. Visit www.kidasa.com/information/programming.

Visit www.kidasa.com/projectreports to view all of these choices.

APPENDIX

Reference Information

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT

How to tag a Milestone

The simplest way to tag a symbol on your schedule is by using the following format:

UNIQUEID,DATE FIELD,TEXT FIELD

No quotes, spaces between fields, or extraneous (non-alphanumeric) characters are permitted. If entered, there may be unexpected results!

Here are examples of correctly and incorrectly entered tags. Text field is an optional field. All examples below use a UniqueID of 20.

Acceptable	Not Acceptable:
20,baseline finish,name	20 baselinefinishname
20,baselinefinish,name	20baselinefinishname
20,baselinefinish	20,baselinefinish,name
20,baselinefinish,baselinefinish	20,"baselinefinish", "name"
20,baselinefinish,percentcomplete	(20),(baselinefinish),(name)
20,finish,start	20,::finish::start
20,finish,wbs	20,wbs,finish
20,finish	20,,finish

Refreshable Microsoft Project Date Fields

The following Microsoft Project date fields can be used to "tag" the milestones on your presentation schedule:

Project Field
Start, Start 1, 2, ...start 10
Finish, Finish 1, 2,...finish 10
Baseline Start, Baseline Finish, Baseline 1 start.. Baseline 10 Start, Baseline 1 Finish, ...Baseline 10 Finish
Actual Start, Actual Finish, Early Start, Early Finish, Late Start Late Finish
Deadline, Stop ,Created, Resume , Constraint Date, Date 1, Date 2,... Date 10

Why won't all schedules refresh?

Some schedules are not able to be refreshed with the latest data from the Microsoft Project source file. The initial import wizard path determines if the schedule can or cannot be refreshed.

When refresh is not allowed, re-importing the Microsoft Project file is recommended.

The reasons for preventing refresh of selected schedules include: in some cases, refresh would not respect the initial import of selected tasks; refreshing the schedule would take significantly longer than re-importing.

Important Refresh Notes

- Only existing start and end dates, baseline start and end dates, late finish dates, symbol text/values, and column text/values are refreshed in Milestones. Time-scaled values found in ValueSets, among other schedule areas, will not be updated.
- Microsoft Project files that have significantly changed after the initial import into Milestones, should be re-imported for the latest Microsoft Project data.
- Refreshing does not change the format of the Milestones schedule.
- Symbols in Milestones can be extensively rearranged (moved to various task rows). Their location is not important, as the unique identifier tag identifies each symbol in Milestones.
- If using Microsoft Projects Unique ID as the unique identifier note that when manipulating the Microsoft Project file: Sorting a resource or task list does not change the Unique ID numbers in Microsoft Project. However, cutting and pasting task rows does change the Unique ID numbers, as Microsoft Project sees that as creating new task rows. Those same tasks in Milestones would, therefore, not be identified correctly when the Refresh is applied.
- Milestones schedules should be saved before refreshing.