

Tutorials

Lesson 18 - Import and Refresh from Oracle Primavera

In this lesson you will learn how to:

- Import Primavera information into Milestones Professional using the XML: MS Project Schema file.
- Update (“refresh”) the Milestones Professional schedule from a changed schedule.

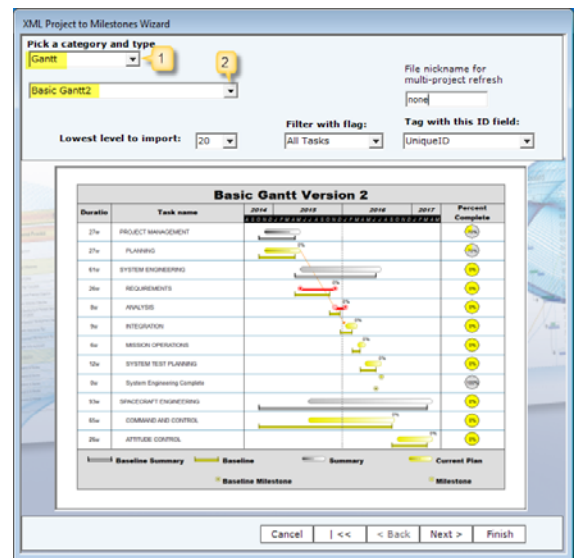
Import a Primavera XML: MS Project Schema file

1. In Milestones Professional, choose **Connections** tab.
2. In the **Other** section choose **Import Schedule from XML File**.
3. Select **XML: MS Project Schema via Project Import Wizard**.
4. Choose your computer's hard drive.
5. Navigate to the Program Files\KIDASA\Milestones Professional 2015\Samples\Lessons folder.
6. Select **Primavera File.xml**.
7. Choose **Open**.

The **XML Project to Milestones Wizard** displays.
For this lesson choose the following:

There are 6 categories of charts to choose from. Each category has a variety of options. As you select each option the window changes for viewing of the different options available.

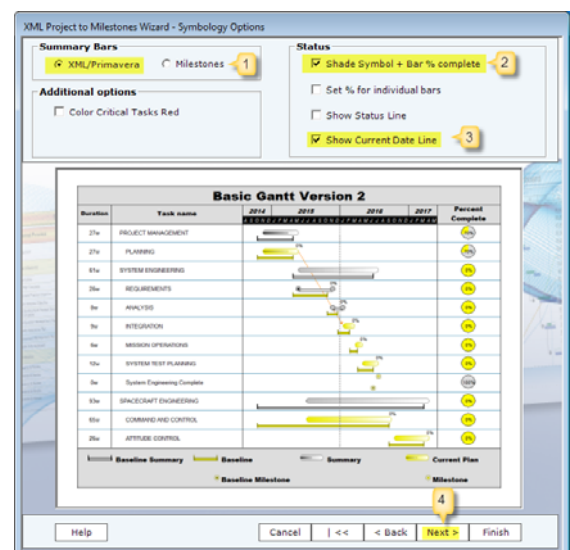
The flag and outline level selections can be used to limit what is imported from Microsoft Project. For this exercise you will import the entire Microsoft Project schedule. A file nick name is used when refreshing a Milestones file from multiple XML project files.



1. Choose Category **Gantt**.
2. Choose Type **Basic Gantt2**.
3. For **Tag with this ID Field** select **Unique ID**.
4. Choose **Next**

The **XML Project to Milestones Wizard - Symbology Options** window displays.

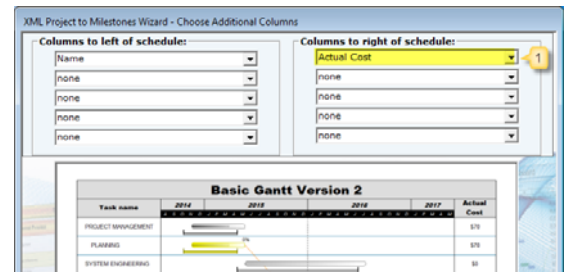
1. **Summary Bars - XML/Primavera**: Summary information will be drawn from Microsoft Project/XML information. If Milestones bars are selected the summary bars shown are based on lower level tasks.
2. **Shade Symbol + Bar % complete**: Symbols and bars will be colored based on the percent complete of the task.
3. **Show Current Date Line**: This line displays on the computers current date.
4. Choose **Next**.



The **XML Project to Milestones Wizard - Choose Additional Columns** window displays.

Make the following selection:

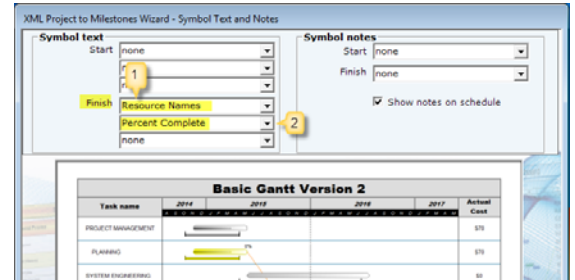
1. Under the **Columns right of the schedule** choose **Actual Cost**.
2. Choose **Next**.



The **XML Project to Milestones Wizard - Symbol Text and Notes** window displays.

Make the following selections:

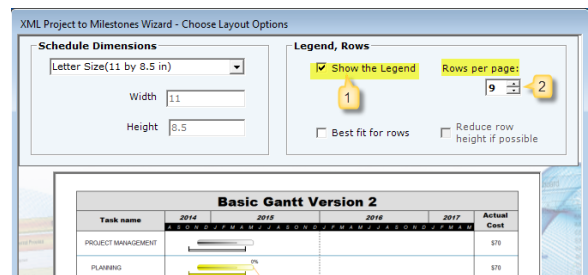
1. **Symbol Text** for **Finish** first row: choose **Resource Names**.
2. **Symbol Text** for **Finish** second row: choose **% Complete**.
3. Choose **Next**.



The **Project to Milestones Wizard - Chose Layout Options** window displays.

Make the following selections:

1. **Show Legend**.
2. For **Rows per page** choose **9**.
3. Choose **Finish**.



Imported schedule from XML file.

4. Save this Milestones Professional schedule to your desktop as **Projects and Costs.mif**.
5. Leave it open for the next section of the tutorial.

Update (“refresh”) the Milestones Professional schedule from a changed XML file

1. In Milestones Professional, choose the **Connections** tab.

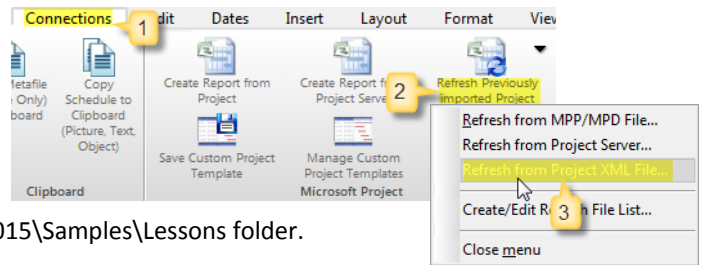
2. Select **Refresh Previously imported Project**.

3. Select **Refresh from Project XML File**.

4. Choose your computer's hard drive.

5. Navigate to the Program Files\KIDASA\Milestones Professional 2015\Samples\Lessons folder.

6. Select **Primavera File Changed.xml**.



The following changes were made to the original Primavera file.

Project Alpha task Review finish date changed to 9/23/2017 and its percent complete changed to 100%. This impacted the actual cost to increase to \$158,500.

The file was then saved as Primavera file Changed.XML

7. Choose **Open**.

The **MS Project Format XML Refresh Options** windows displays.

1. For **Refresh Using** choose **Unique ID**.

For **Symbol Text**:

2. **Refresh Symbol Text**.

3. **Update start and finish symbols using**.

4. For **Line 1: Start** select **Duration**.

5. For **Line 1: Finish** select **Resource Names**.

6. For **Line 2: Finish** select **% Complete**.

For **Percent complete**:

7. **Refresh Percent Complete**.

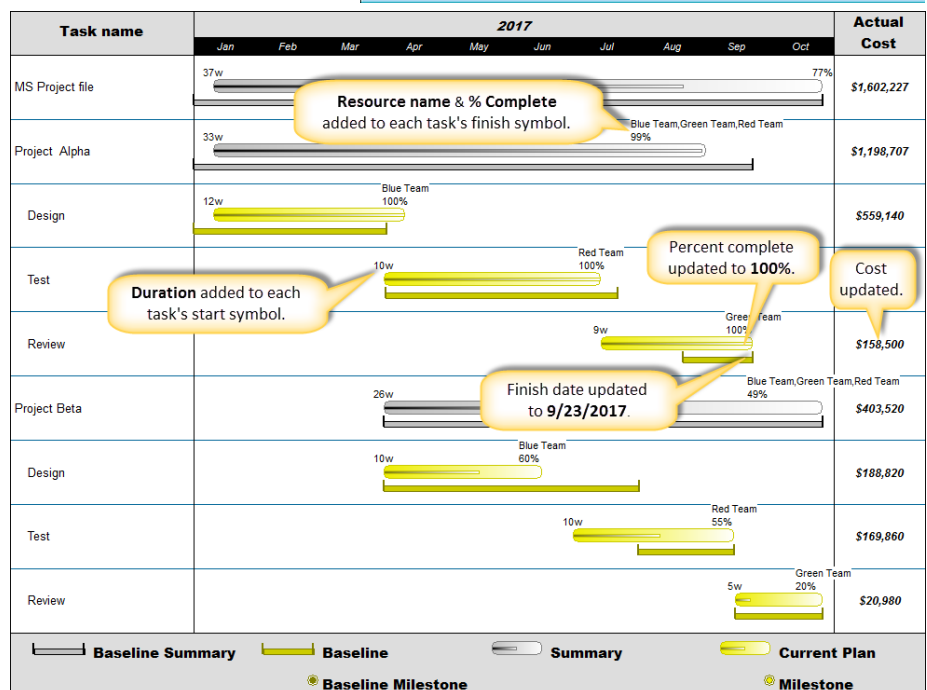
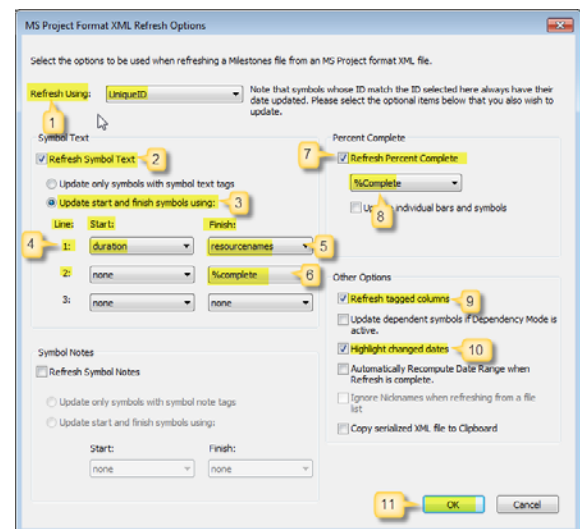
8. Choose **% Complete**.

For **Other Options**:

9. **Refresh tagged Columns**.

10. **Highlight changed dates**.

11. Select **OK**.



Refreshed Schedule