Getting Started with Milestones Professional:
Explore the workspace

To learn more about the Milestones window choose: Help | Help Topics. Select the Index tab and type in the feature. For Example: Toolbox.
**Getting Started with Milestones Professional:**
Set the date range and more with the Dates tab

**CHOOSE THE DATES TAB TO:**

1. Set the schedule’s **Date Range**.
2. Set the **Current Date**.
3. Display the **Current Date**.
4. Display the **Current Date Line**.
5. Display the **Status Line**.
6. Have **Symbols & Bars Fill to Status Date**.
7. Choose **Four-Digit Years**.
8. Set the **Symbol Date Format**.
9. Set the schedule’s **Date Headings**.

**Choose the Full Dialog button to find more options for a feature.**

**Make sure to press the APPLY button to apply changes to the schedule.**

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**Master Phasing Schedule**

<table>
<thead>
<tr>
<th>Quarter Month</th>
<th>2013</th>
<th>2014</th>
<th>2015</th>
<th>2016</th>
<th>2017</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>First</td>
<td>Second</td>
<td>Third</td>
<td>Fourth</td>
<td>First</td>
</tr>
<tr>
<td>Program Milestones</td>
<td>Award</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Subcont Milestones</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
<td>✔</td>
</tr>
<tr>
<td>Phase One</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase Two</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Phase Three</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

---

1. **Date Range**
2. **Current Date**
3. **Display Date**
4. **Current Date Line**
5. **Status Line**
6. **Symbol and Bar Fill to Status Date**
7. **Four Digit Year**
8. **Symbol Date Format**
9. **Date Headings**
Getting Started with Milestones Professional: Set the chart size and more with the Layout Tab

**CHOOSE THE LAYOUT TAB TO:**

1. Set the **Chart Size**.
2. Set the **Margins**.
3. Set the **Rows per Page**.
4. Set the **Orientation**.
5. Set the **Legend Height**.
6. Set the three possible **DataGraph** heights.
7. Set up **Summary Bars**.
8. Set up **Baseline**.
9. Set **Duration** options.
10. Change the global **Symbol Size**.

Choose the **Full Dialog** button to find more options for a feature.

Make sure to press the **APPLY** button to apply any settings which have been made.

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**CAMPUS MASTER PLAN - 9711**

**Preliminary Cash Flow Projection**

<table>
<thead>
<tr>
<th>Phase</th>
<th>Duration</th>
<th>2012</th>
<th>2013</th>
<th>2014</th>
<th>Total Costs</th>
</tr>
</thead>
<tbody>
<tr>
<td>Totals</td>
<td>7. Summary Task</td>
<td>42d</td>
<td>30</td>
<td>1/3</td>
<td>6/13</td>
</tr>
<tr>
<td>Schematic Design</td>
<td></td>
<td>64d</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Design Development</td>
<td></td>
<td>85d</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction Documents</td>
<td></td>
<td></td>
<td>1/12</td>
<td>5/12</td>
<td></td>
</tr>
<tr>
<td>Permitting</td>
<td></td>
<td>86d</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Bidding and Negotiation</td>
<td></td>
<td>77d</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Totals</td>
<td>524d</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction Phase 1</td>
<td>179d</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction Phase 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction Phase 3</td>
<td></td>
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</tr>
<tr>
<td>Construction Phase 4</td>
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<td>Construction Phase 5</td>
<td></td>
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<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Construction Costs</td>
<td></td>
<td></td>
<td>$11,060</td>
<td>$4,210</td>
<td>$7,676</td>
</tr>
<tr>
<td>Soft Costs</td>
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<td></td>
<td>$7,000</td>
<td></td>
<td></td>
</tr>
<tr>
<td>Total Costs</td>
<td></td>
<td></td>
<td>$18,060</td>
<td>$4,210</td>
<td>$7,676</td>
</tr>
</tbody>
</table>

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To learn more about a feature choose: Help | Help Topics | Select the **Index** tab and type in the feature. For Example **Baseline**.
Getting Started with Milestones Professional:
Add a title, legend, page and more with the Insert tab

CHOOSE THE INSERT TAB TO:

1. Insert a Chart Title.
2. Insert a Page.
3. Insert a Page Break.
4. Insert a Task Row.
5. Insert more Rows per Page
6. Insert a New Column.
7. Insert a Picture from File
8. Insert a Legend Entry.
9. Insert a Vertical Link.
10. Insert a Recurring Tasks.
11. Insert or Remove Baseline.
12. Insert a DataGraph.
13. Insert a ValueSet.

The Insert tab includes links to key components of a schedule. Use the Insert tab to add tasks, columns, chart title, and more.
Getting Started with Milestones Professional: Apply a color theme, add grid lines and more with the Format tab

CHOOSE THE FORMAT TAB TO:

1. Apply a Color Theme.
2. Add Vertical Gridlines.
3. Add Horizontal Gridlines.
4. Add Curtains.
5. Add Holiday Shading.
6. Change Default Text.
9. Change the global Symbol Size.
10. Set International Number and Currency.
11. Set Gridline Properties for Outline Levels.

1. Color Themes determine the color of various schedule elements, like the title box.
2. Vertical Gridlines
3. Using Horizontal Gridlines and Shading, task rows can be made to look like one orange swim lane.
4. Curtains
5. Holiday Shading. Set the holiday calendar on the Dates tab.
6. Default Text. Set the style, color, and size for each text element on the schedule.
7. Background color, border frame, corners.
8. This symbol has Shadows and Highlights that can be turned off.
9. Symbol Size. Make a global change to the schedule's symbols size.
10. International Number and Currency
11. Assign features to tasks based on their outline level using the option: GRIDLINE, SHADING, FONT SIZES BY OUTLINE LEVEL.
Getting Started with Milestones Professional: The ToolBox

Arrow Tool - Use to select, change or move objects on the schedule.

Plus Tool - Use to add information to the schedule.

Small Plus - Select to add the corresponding symbol, bar, symbol combination to the schedule.

Symbol - select to add to schedule.

Text Tool - Use to add text anywhere on the schedule.

Drawing Tools - Use to draw lines, circles or squares.

Horizontal Bar - select to add between symbols on the schedule.

Vertical Link - select to add a link between symbols on different task rows, to show a dependency.

Right click the TOOLBOX to change its characteristics.

Set up a toolbox to your standards. Then copy and paste it to another schedule. Both schedules must be opened in the same instance of Milestones.

Set up a row in the toolbox that then can be copied and pasted to another row in the toolbox or another schedule's toolbox. Both schedules must be opened in the same instance of Milestones.

Double click any Symbol, Horizontal Bar or Vertical Link in the toolbox to change its characteristics: (Shape, Type, Size, Color, Markings, Position, Text and Date display.)
Add a single Symbol

1. In the toolbox, select the Large Plus tool.
2. Select a symbol in the toolbox.
3. Move the cursor to the schedule area.
4. Click and drag horizontally.
5. Let go of the mouse button at the selected symbol date.

Add a Horizontal Bar with a start and end symbol

1. In the toolbox, select the Small Plus at the beginning of a row.
2. The entire row in the toolbox will be highlighted in blue.
3. Move the cursor to the schedule area.
4. Click on the start date and drag horizontally.
5. Release the mouse button on the end date.

Add a Horizontal Bar

1. In the toolbox, select the Small Plus at the beginning of a row with null symbols and a horizontal bar.
2. The entire row in the toolbox will be highlighted in blue.
3. Move the cursor to the schedule area.
4. Click on the start date and drag horizontally.
5. Release the mouse button on the end date.

To set up a horizontal bar in the toolbox first set the symbols on the right and left side of a toolbox row to Symbol Shape 28 (null symbol). For the bar, use Bar Type 2, 5 or 7.

Add a Bar and Symbol to a symbol already on the schedule

1. In the toolbox, select the Large Plus tool.
2. Select a symbol in the toolbox.
3. Select a connector in the toolbox.
4. Move the cursor to the schedule area and click on the already existing symbol.
5. Continue to hold the mouse button and drag horizontally.
6. Let go of the mouse button at the desired date.
Getting Started with Milestones Professional: Add information to the schedule

Add a Horizontal Bar between two symbols on the schedule
1. In the toolbox, select the Large Plus tool.
2. In the schedule area, click once on the Symbol from which you want the horizontal bar to begin.
3. In the toolbox, click once on a Horizontal Bar.
4. In the schedule area, click once on the Symbol which completes the horizontal link.

Add a Vertical Link between symbols on the scheduled
1. In the toolbox, select the large Plus tool.
2. In the schedule area, click once on the symbol from which you want the vertical link to begin.
3. In the toolbox, click once on the Vertical Link to be used.
4. In the schedule area, click once on the symbol which completes the vertical link. (Must be on a lower or higher task row)

Add Column Text (1)
1. In the toolbox, select the Text tool.
2. Click in the column on the schedule and start to type.

Add Symbol Text (2)
1. With the arrow tool, click the symbol on the schedule. The toolbar will change to the Selection tab.
2. Choose the Text tab.
3. In the Text section, enter up to 3 lines of text in the Text Line 1, 2, or 3.
4. Click the APPLY TEXT CHANGES button.
5. In the TEXT PLACEMENT section, select the positioning of the text.

Add Freeform Text (3)
1. In the toolbox, select the Text tool:
2. Click anywhere on the schedule and start to type.
3. Select the freeform text with the Arrow tool. The toolbar changes to the Selection tab.
4. In the toolbar make changes to the freeform text’s attributes.

Add Symbol Notes (4)
1. With the arrow tool, click the symbol on the schedule. The toolbar will change to the Selection tab.
2. Choose the Notes tab.
3. In the Symbol Note section, type in your notes.
4. Click the Apply Text Changes button.
5. Select from the variety of formatting options.
6. Use the directional pad to reposition the symbol note or use the Arrow tool to drag the symbol note on the schedule to a location.
Getting Started with Milestones Professional
Change information on the schedule

Change a Symbol on the schedule
1. In the toolbox, select the Arrow tool.
2. In the schedule area, click once on a Symbol that you want to change.
3. In the toolbox, click once on a different Symbol.

Change a Bar on the schedule
1. In the toolbox, select the Arrow tool.
2. In the schedule area, click once on the Symbol which begins the Horizontal Bar to be changed.
3. In the toolbox, click once on a different Horizontal Bar.

Change a Vertical Link on the schedule
1. In the toolbox, select the Arrow tool.
2. In the schedule area, click once on the Symbol with the Vertical link that you want to change.
3. In the toolbox, click once on a different vertical Link.

Change the properties of an individual Symbol on the schedule
1. Using the toolbox arrow tool, select the symbol.
2. The toolbar will change to the Selection tab for that symbol.
3. Select the Text tab to change the text, size color font attributes, date format and/or the position of the text or date.
4. Select the Size/Color tab to change the symbol’s color, size, vertical position on the task row.
5. Select the Summary/Mark tab to change the Symbol Mark and its color.
6. Select the Notes tab to add notes to the symbol and change the characteristics of the note.
7. Select the Vertical Links tab to override the vertical link’s color.
Override the color of a Bar on the schedule
1. Using the toolbox arrow tool, select the starting symbol of symbol, bar, symbol combination on the schedule. The toolbar will change to the Selection tab for the starting symbol.
2. Select the Size/Color tab.
3. In the Override Symbol and Bars Colors section click on the rectangle box next to 1st Bar Color to display the color palette.
4. Choose the new color.

Override the color and or line type of a Vertical Link on the schedule
1. Using the toolbox arrow tool, select the starting symbol of the vertical link. The toolbar will change to the Selection tab for the starting symbol.
2. Select the Vertical Links tab.
3. In the Vertical Links from the Current Symbol section click on the rectangle box to display the color palette. Click the down arrow to display the line pattern list for the Link (1 through 5) to be changed.
4. Choose the new color and/or line pattern.

Change an existing Column’s type
1. In the toolbox, select the toolbox Arrow tool.
2. Click the column heading of the column you want to change. The toolbar will change to the Selection tab.
3. Click the Switch to Column icon.
4. In the Column Type and Format section choose the down arrow next to the Properties button. Pick from the available column types.

Move a Column
1. In the toolbox, select the Arrow tool.
2. Move the cursor to the top of the column heading’s border. The cursor changes to the Column Move cursor.
3. Click and drag to the new location, as shown by the Insertion cursor.
Shift all **Schedule Dates** by a number of days
1. On the toolbar, click the **Dates** tab.
2. In the **Date Range Tools** section click the **Shift all task dates** icon. The Shift all dates for Schedule dialog box displays.
3. Enter the number of days. Choose **Forward** or **Backward**.

Hide/show all **Symbol Dates** and/or **Symbol Text**
1. On the toolbar, click the **View** tab.
2. In the **Other** section, click **Override Symbol Text and Symbol Date Display**.

**Convert Symbol Text to Symbol Notes**
1. On the **Format** tab choose **Symbol Notes** to first set up default symbol note settings.
2. Choose the **Tools** tab. In the **Other Tools** section, choose **Convert symbol Text to Note Text...**
3. Select symbols to convert.
4. Select how to convert.
Getting Started with Milestones Professional
Interface with other products using the **Connections** tab

**CHOOSE THE **CONNECTIONS** **TAB TO:**

1. **Copy Metafile (picture) to the Clipboard**
   Milestones is placed into another application as a picture.

2. **Copy Schedule to the Clipboard**
   Milestones is placed into another application as a picture, text or object (can be linked and will update when the actual Milestone file is changed).

9. **Copy all Pages to PowerPoint**
   Pictures of all pages of a schedule will be copied to a new or existing PowerPoint document.

10. **Copy PowerPoint Slides from Project**
    The Project to Milestones Wizard will open. A Milestones schedule is generated based on wizard selections. It is then copied to PowerPoint.

3. **Create Report from Project**

4. **Create Report from Project Server**
   The Project to Milestones Wizard will open. A Milestones Professional schedule will be created using selections made in the wizard. Learn more Help | Help Topics.

6. **Save Custom Project Template**
   Pick this option to save a customized Milestones Professional schedule as a custom template and include it in the import wizard. Learn more Help | Help Topics.

7. **Manage Custom Project Templates**
   Choose this option to view and manage Custom Project Templates. Learn more Help | Help Topics.

5. **Refresh Previously Imported Project**
   Refresh a Milestones schedule from one or more Microsoft Project, Project Server or XML files.
   If refreshing from multiple schedules, build a refresh list first. Learn more Help | Help Topics.

8. **Export to Project**
   Choose this option to create a Microsoft Project schedule from a Milestones Professional schedule. Learn more Help | Help Topics.
Getting Started with Milestones Professional
Interface with other products using the **Connections** tab.

11. **Import Outlook Tasks or Calendar**
The Outlook information is imported into a set Milestones templates which can be modified after the import.

12. **Export Tasks to Outlook**
Pick the column of information from your Milestones schedule to import as the description for the dates that will be placed into your Outlook Task List.

14. **Export Schedule to XML file**
Choose from a variety of export options.

15. **Import Schedule to XML file**
Generate a schedule from a Primavera saved XML:MS Project schema file with the XML Project to Milestones Import Wizard.
Choose from other XML import options.

13. **Internet Publishing Wizard**
Choose to create schedule graphics and HTML pages ready for your web site.

If a schedule has links to other schedules or documents then hotspots will be created. Also, any Milestones schedules which are linked will also be published as HTML.

If a schedule is outlined, then a set of HTML pages called a “tiered hierarchy” can be created, with multiple HTML pages for each outline level.
Getting Started with Milestones Professional
Work with files and more using the File tab

CHOOSE THE FILE TAB TO:

1. New
   - New Empty Schedule: Choose to create a new schedule with the “default” template.
   - Clone Current Schedule: create a new schedule from an existing schedule.

2. Wizard
   - The wizard will guide you through setting up a schedule using Step by Step or a Predesigned Template.

3. Open
   - Choose to open an existing Chart, Sample Chart, or Lesson Chart (associated with the tutorials available on the Help tab).
   - Choose to open a Template over currently opened schedule. Standard templates have been predesigned. Personal Templates are ones you design.
   - Open a Microsoft Project File to have the import wizard start-up. See page 12 for information about the Project to Milestones Wizard.

4. Open a Recently Used File
   - Choose from the list of previously used files. Edit the list by selecting Edit this list.
   - This list also appears in the Milestones Professional Startup Choices dialog box.

5. Password
   - Apply up to a 20 character password to lock a file or to allow the file to be opened as Read-Only without the password.

6. Save As
   - Save as CHART to save a schedule’s dates, column entries and structure.
   - Save as TEMPLATE to save just the structure of a schedule. Templates do not include any dates or column entries.
   - Save as PDF for easy sharing of a schedule.
   - Save as HTML to have the Internet Publishing Wizard start-up. Learn more about the wizard under Help | Help Topics.

7. Save As PDF
   - Save as PDF for easy sharing of your schedule.

8. Import and Export options
   - Choose from a variety of import and export options. Learn more about these under Help | Help Topics.
9. Master Schedule
Choose to combine multiple Milestones schedules.

10. Update Master Schedule, Linked Symbols
Choose Master Schedule to update a Master Schedule with lower level schedules.
Symbols can be linked between Milestones charts. To have linked symbols update choose Linked Symbols.
Learn more about master schedules and linked symbols under Help | Help Topics.

11. Microsoft Project Refresh
Refresh a file imported from, or tagged to, a Microsoft Project or Microsoft Project server file or files. Build a refresh list for a Milestones files tagged to multiple Microsoft Project or Microsoft Project Server files. Learn more about importing from Microsoft Project under Help | Help Topics.

12. Printing
Choose Printing Options to change the output size, print a specified date range, or exclude columns.

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