

Getting Started with Milestones Professional: Explore the workspace

The screenshot shows the Milestones Professional workspace with several key components highlighted by yellow callouts:

- Toolbar:** Located at the top center, containing icons for gridlines and shading.
- Column Heading:** Points to the 'Tasks' column header in the Gantt chart.
- Title:** Points to the main title 'Proposal Schedule with Outlining'.
- Date Headings:** Points to the month headers (August, September, October, November) in the Gantt chart.
- Task Row:** Points to a row of tasks in the Gantt chart.
- SmartColumn:** Points to a vertical column in the Gantt chart.
- Legend:** Points to the legend box in the Gantt chart, which defines symbols for Summary, Scheduled, Baseline, and another Summary.
- Schedule Area:** Points to the main Gantt chart area.
- DataGraph:** Points to the bar chart at the bottom of the workspace.
- Status Bar:** Located at the bottom of the workspace, showing 'Page 1 of 1' and other status information.
- Toolbox:** Located on the right side, containing various drawing and editing tools.
- Sidebar:** Located on the right side, containing navigation and utility options like 'Go to page', 'Find', and 'Publish'.

The screenshot shows the 'Milestones Professional 2015 Help' window. The 'Index' tab is active, and the search results for 'Toolbox' are displayed. The search results include:

- about
- add bitmap symbol
- arrow tool
- background color
- combo
- copy and paste to another schedule
- copy to another schedule

To learn more about the Milestones window choose: **Help | Help Topics**.
Select the **Index** tab and type in the feature. For Example: **Toolbox**.

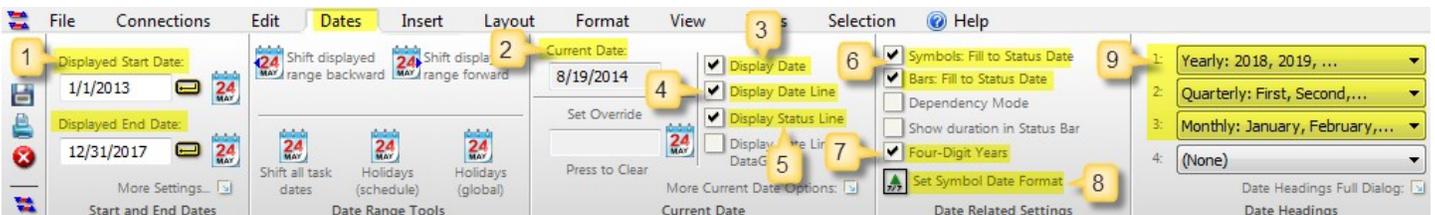
Getting Started with Milestones Professional: Set the date range and more with the Dates tab

CHOOSE THE **DATES** TAB TO:

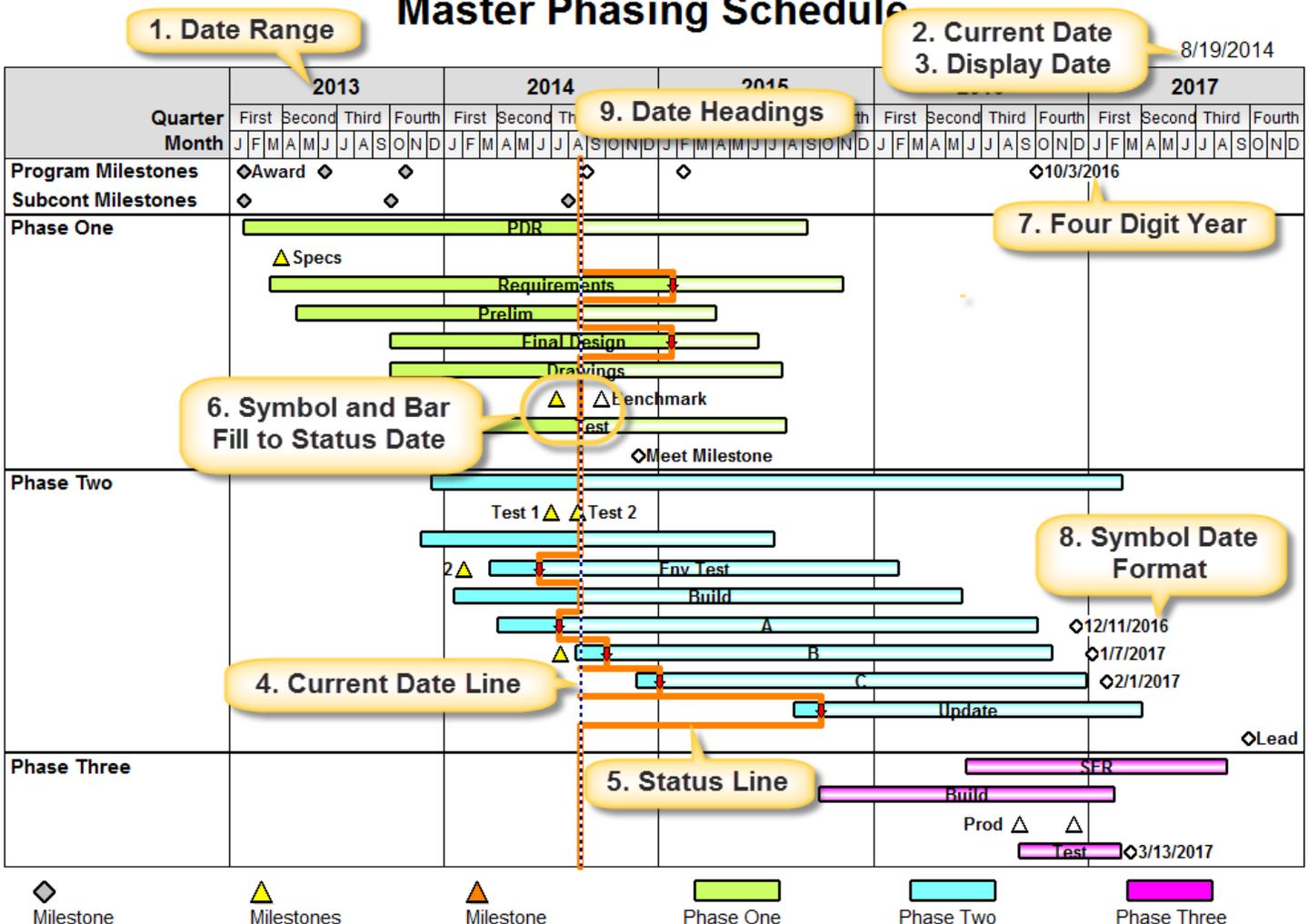
1. Set the schedule's **Date Range**.
2. Set the **Current Date**.
3. Display the **Current Date**.
4. Display the **Current Date Line**.
5. Display the **Status Line**.
6. Have **Symbols & Bars Fill to Status Date**.
7. Choose **Four-Digit Years**.
8. Set the **Symbol Date Format**.
9. Set the schedule's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



Master Phasing Schedule



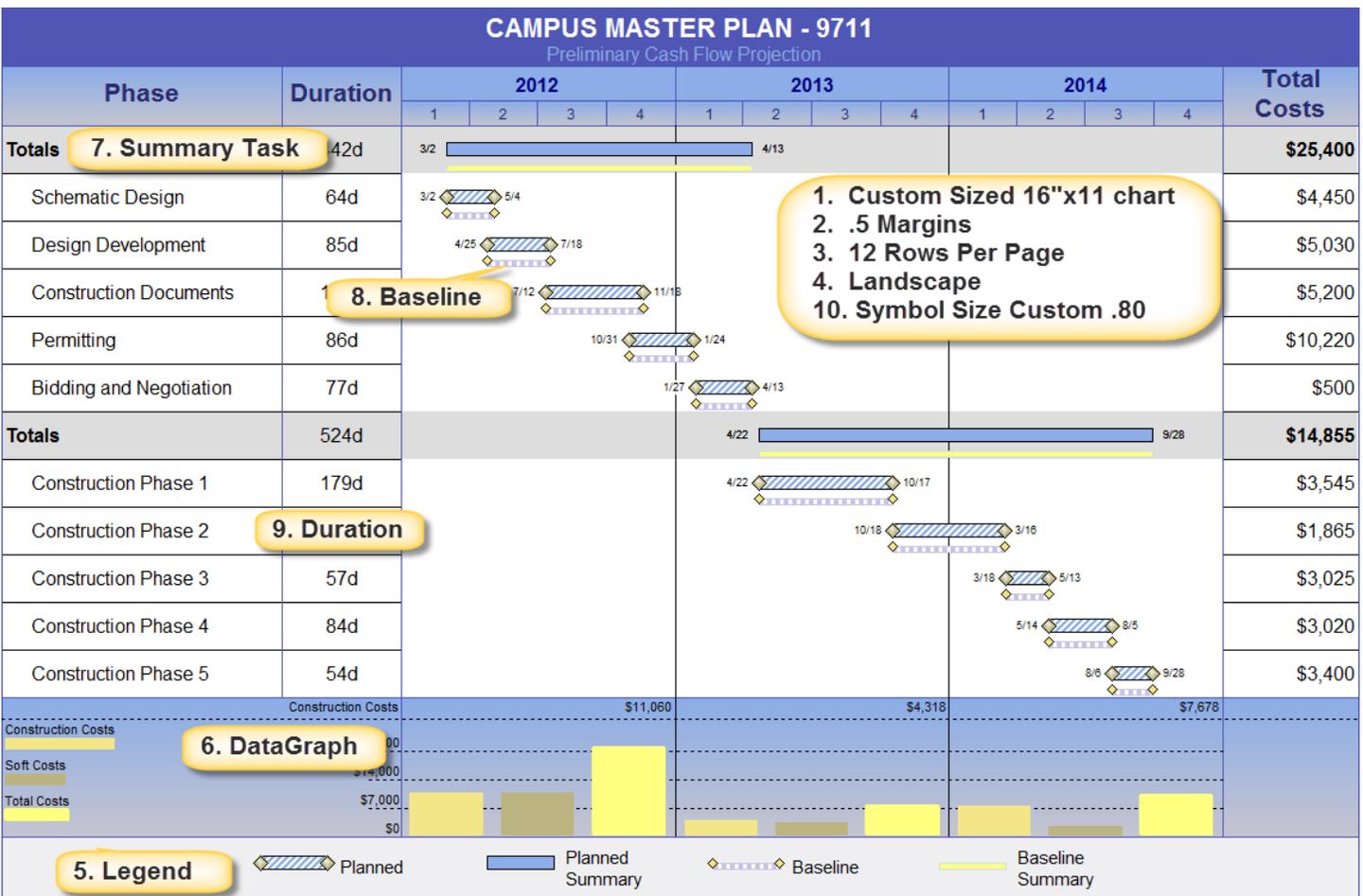
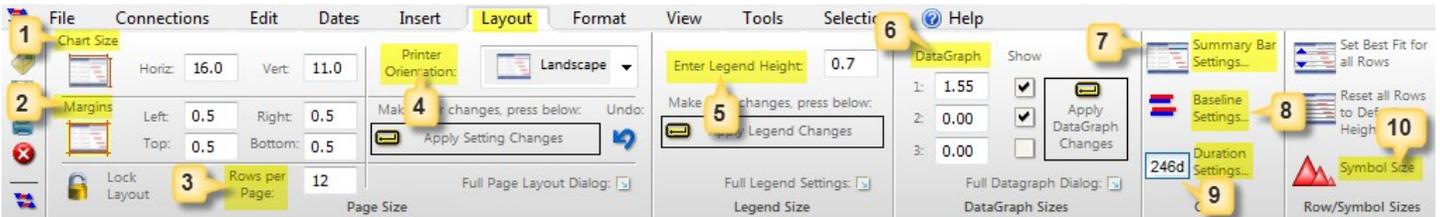
Getting Started with Milestones Professional: Set the chart size and more with the Layout Tab

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.



1. Custom Sized 16"x11 chart
2. .5 Margins
3. 12 Rows Per Page
4. Landscape
10. Symbol Size Custom .80

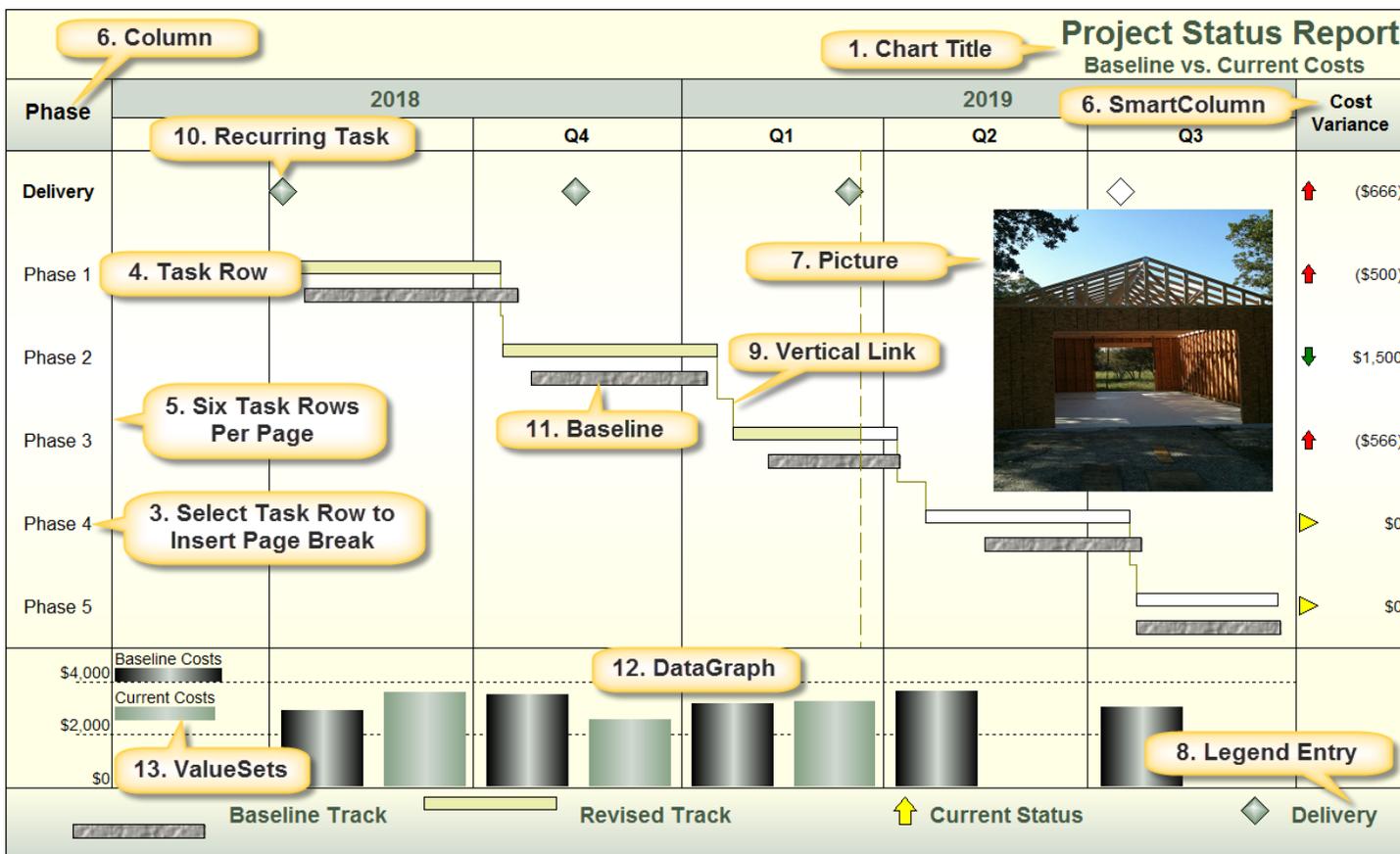
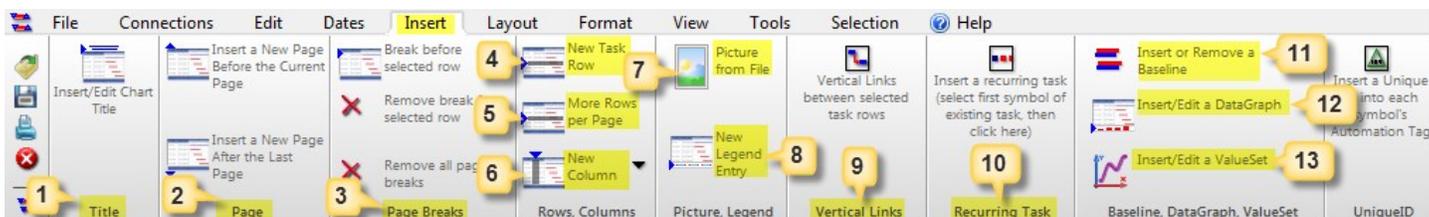
To learn more about a feature choose: **Help | Help Topics |**
Select the **Index** tab and type in the feature. For Example **Baseline**.

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**.

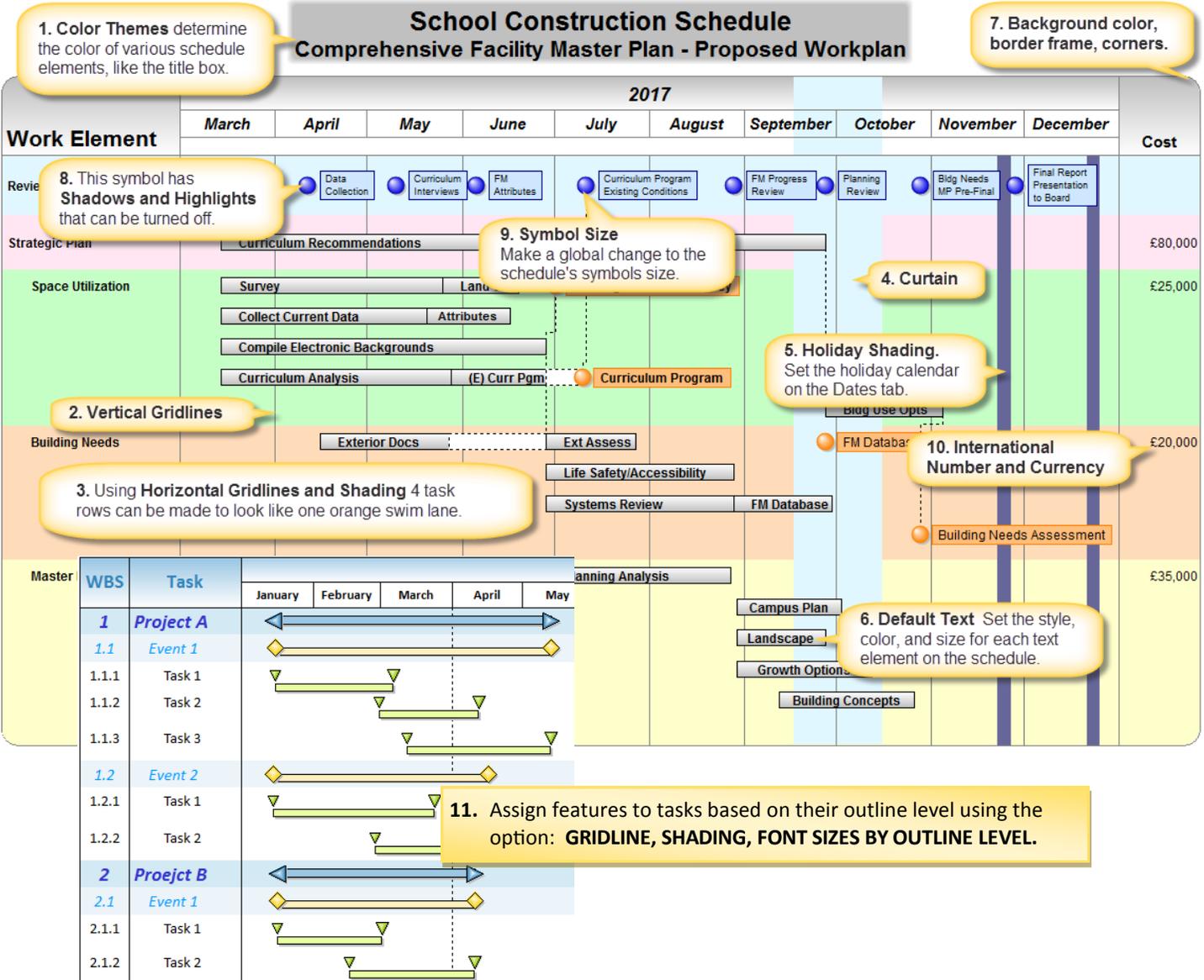
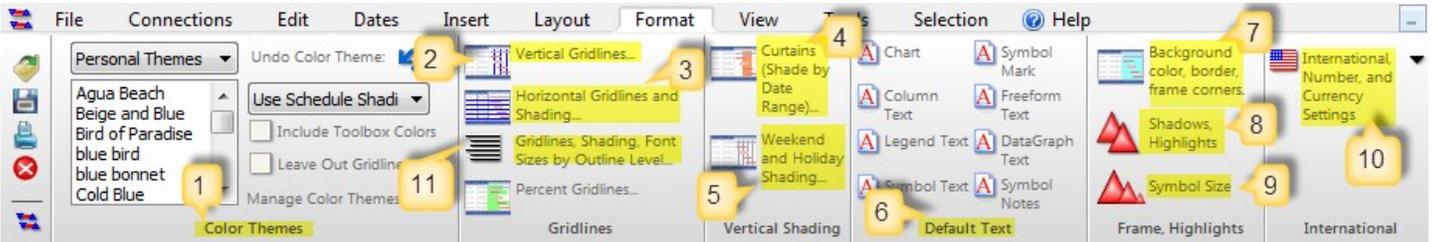
The **Insert** tab includes links to key components of a schedule. Use the **Insert** tab to add tasks, columns, chart title, and more.



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**.
7. Change **Background Color, Border, and Frame Corners**.
8. Clear **Shadows, Highlights**.
9. Change the global **Symbol Size**.
10. Set **International Number and Currency**.
11. Set **Gridline Properties for Outline Levels**



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.

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

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

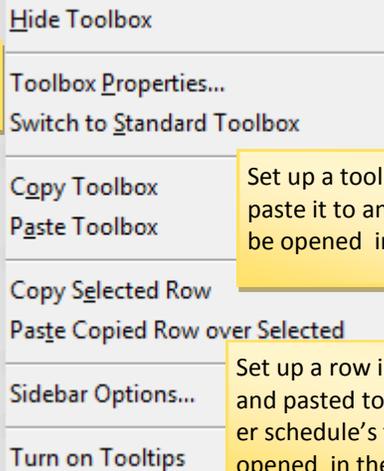
Drawing Tools - Use to draw lines, circles or squares.

Symbol - select to add to schedule.

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

Right click the **TOOLBOX** to change its characteristics.

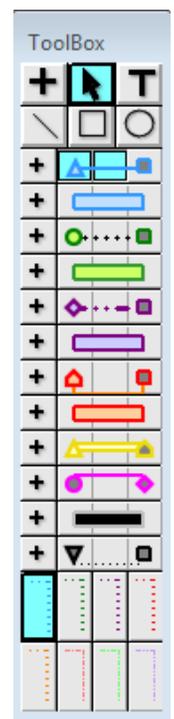
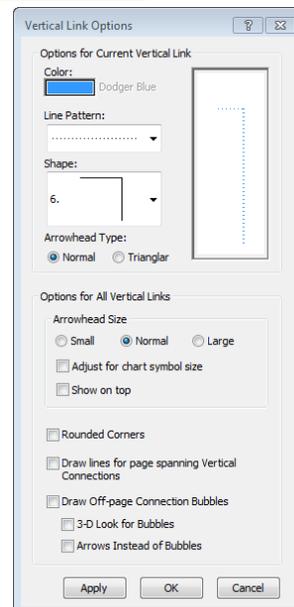
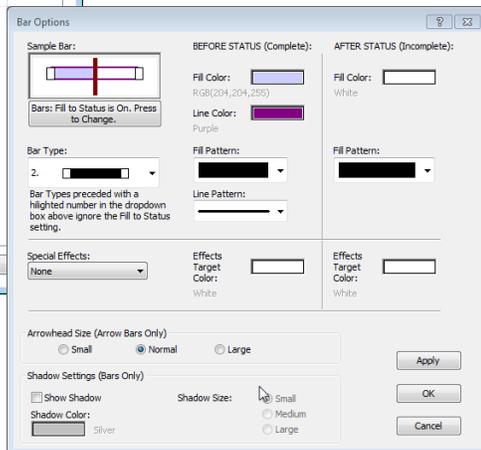
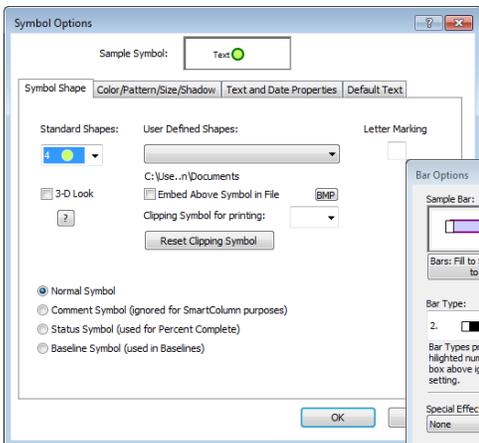
Vertical Link - select to add a link between symbols on different task rows, to show a dependency.



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.

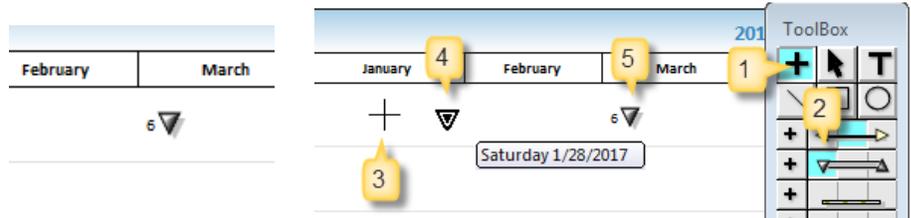
Double click any **Symbol**, **Horizontal Bar** or **Vertical Link** in the toolbox to change its characteristics: (Shape, Type, Size, Color, Markings, Position, Text and Date display.)



Getting Started with Milestones Professional: Add information to the schedule

Add a single Symbol

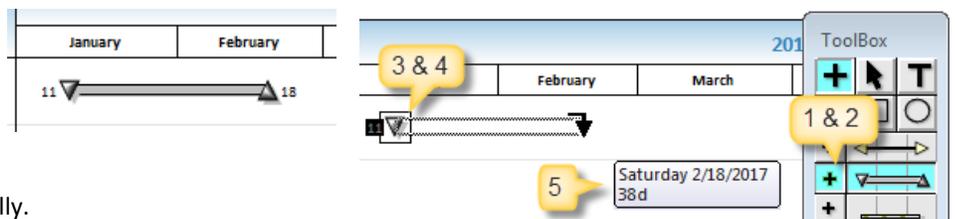
1. In the toolbox, select the **Large Plus** tool.
2. Select a symbol in the toolbox.
3. Move the cursor to the schedule area.
4. Click and drag horizontally.
5. Let go of the mouse button at the selected symbol date.



To see the date next to the cursor, **Tooltips in the Schedule area** need to be turned on. **Tool | Help |** uncheck **No Tooltips in the Schedule area**.

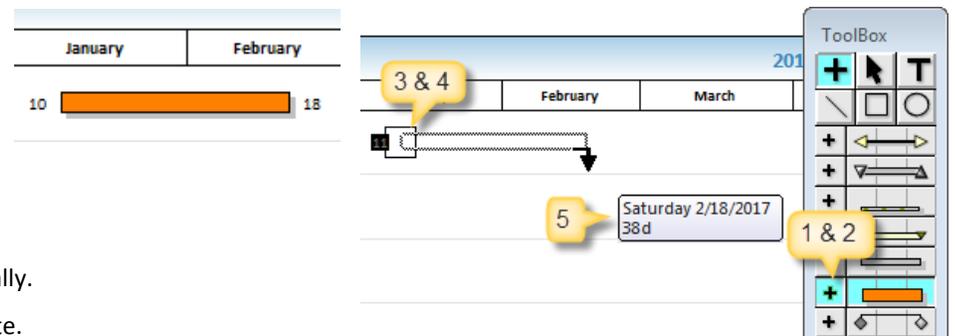
Add a Horizontal Bar with a start and end symbol

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

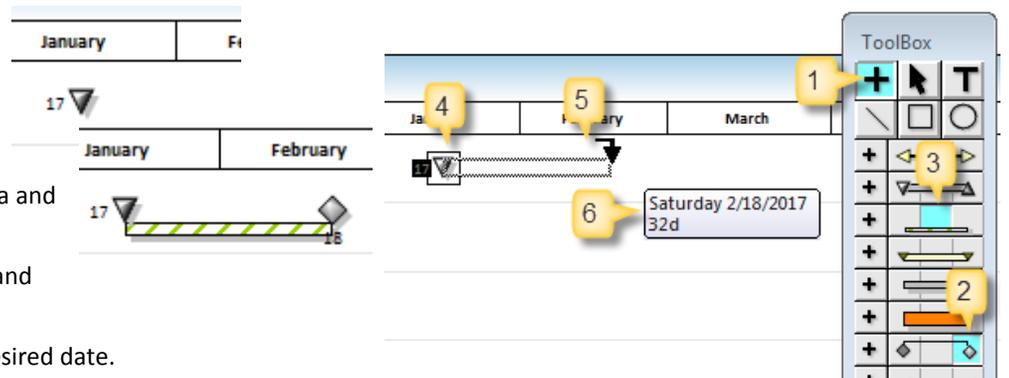
1. In the toolbox, select the **Small Plus** at the beginning of a row with null symbols and a horizontal bar.
2. The entire row in the toolbox will be highlighted in blue.
3. Move the cursor to the schedule area.
4. Click on the start date and drag horizontally.
5. Release the mouse button on the end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

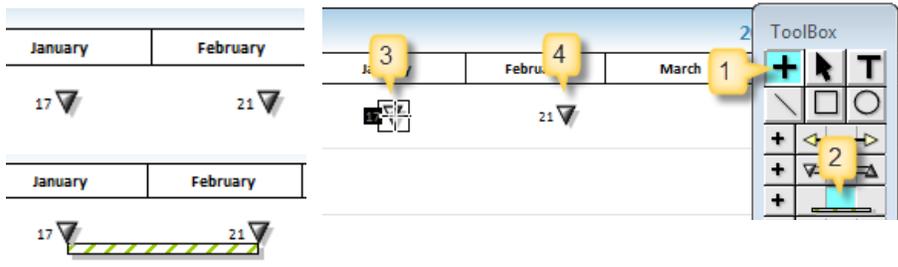
1. In the toolbox, select the **Large Plus** tool.
2. Select a symbol in the toolbox.
3. Select a connector in the toolbox.
4. Move the cursor to the schedule area and click on the already existing symbol.
5. Continue to hold the mouse button and drag horizontally.
6. Let go of the mouse button at the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



Getting Started with Milestones Professional: Add information to the schedule

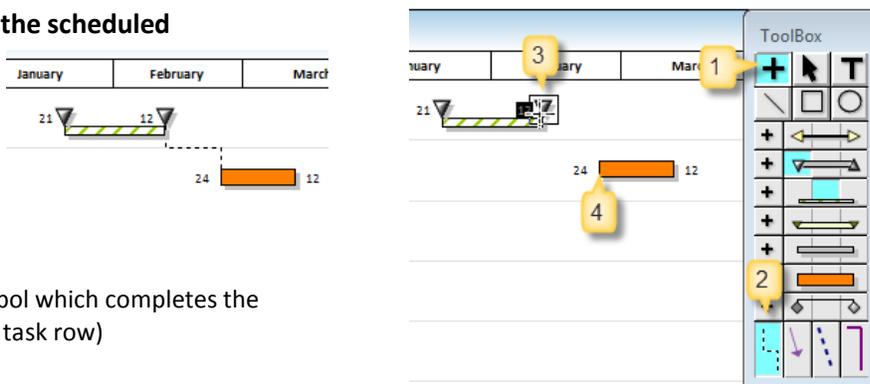
Add a Horizontal Bar between two symbols on the schedule

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)



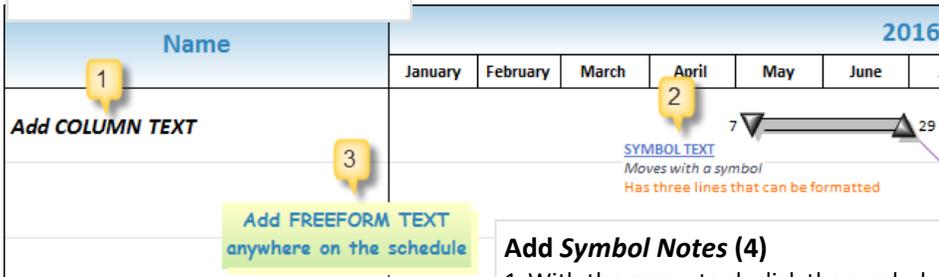
Add Column Text (1)

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.



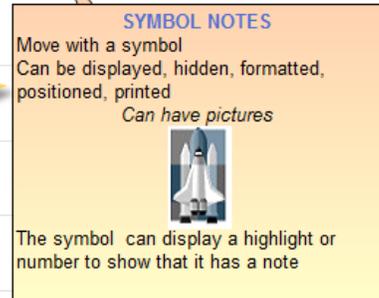
Add FREEFORM TEXT anywhere on the schedule

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.

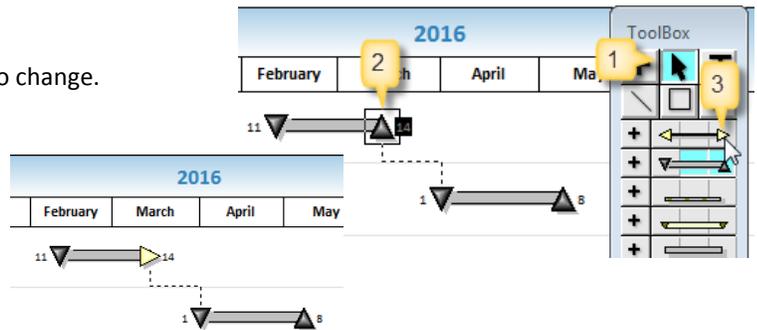
Getting Started with Milestones Professional

Change information on the schedule

Change a *Symbol* on the schedule

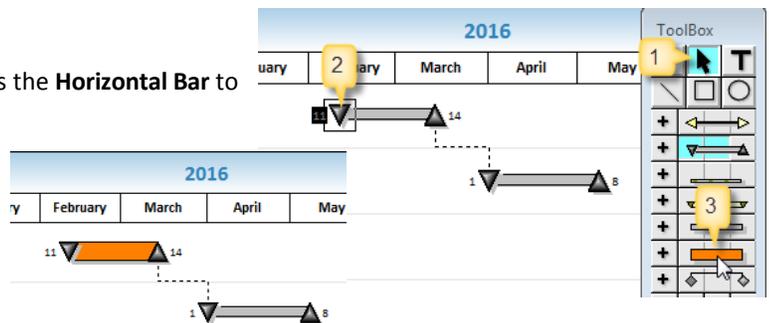
1. In the toolbox, select the **Arrow** tool.
2. In the schedule area, click once on a **Symbol** that you want to change.
3. In the toolbox, click once on a different **Symbol**.

Using the shift key you can select a group of symbols to change.



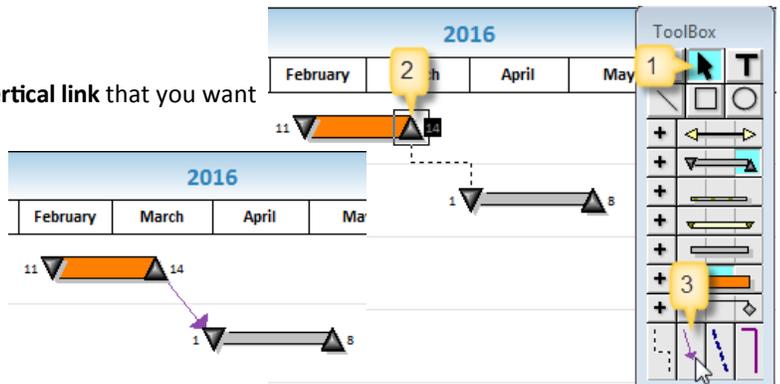
Change a *Bar* on the schedule

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**.



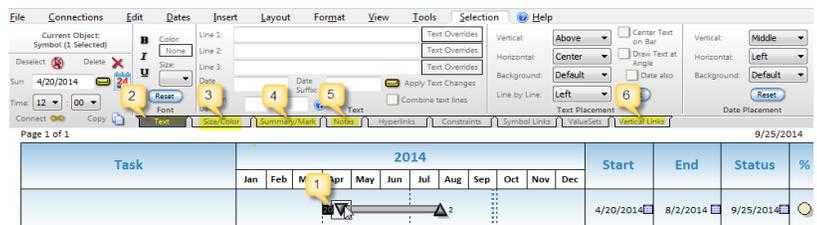
Change a *Vertical Link* on the schedule

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

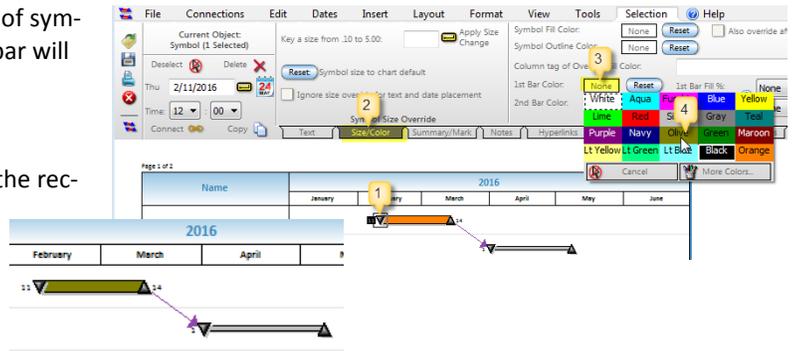
1. Using the toolbox arrow tool, select the symbol.
2. The toolbar will change to the **Selection** tab for that symbol.
3. Select the **Text** tab to change the text, size color font attributes, date format and/or the position of the text or date.
4. Select the **Size/Color** tab to change the symbol's 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.



Getting Started with Milestones Professional: Change information on the schedule

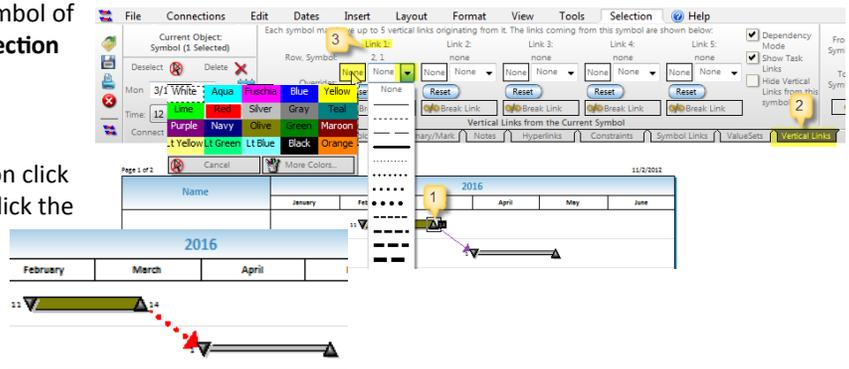
Override the color of a *Bar* on the schedule

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.



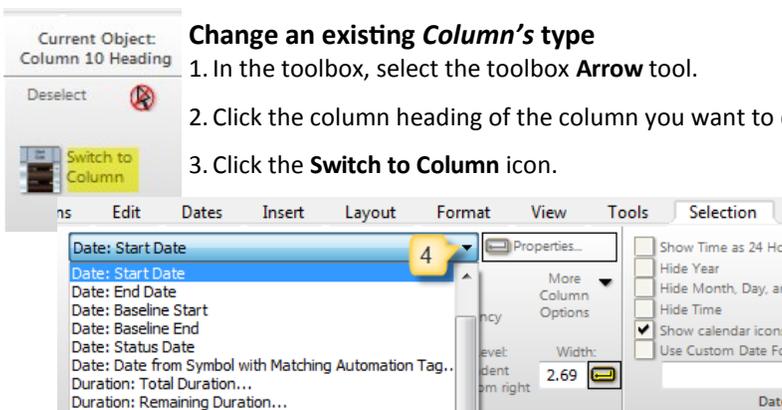
Override the color and or line type of a *Vertical Link* on the schedule

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

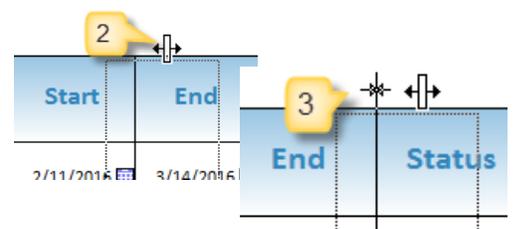
1. In the toolbox, select the toolbox **Arrow** tool.
2. Click the column heading of the column you want to change. The toolbar will change to the **Selection** tab.
3. Click the **Switch to Column** icon.



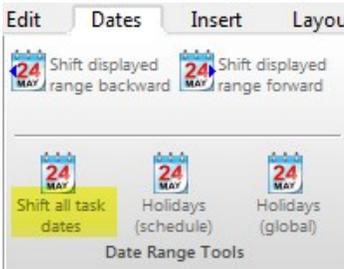
4. In the **Column Type and Format** section choose the down arrow next to the Properties button. Pick from the available column types.

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.



Getting Started with Milestones Professional: Change information on the schedule

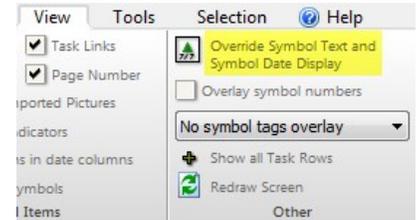


Shift all *Schedule Dates* by a number of days

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**.

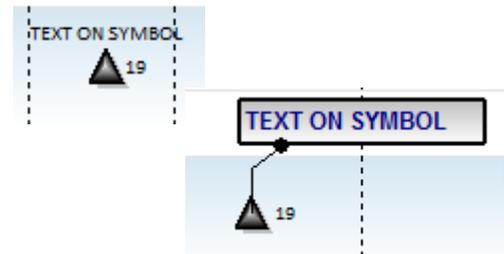
Hide/show all *Symbol Dates* and/or *Symbol Text*

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

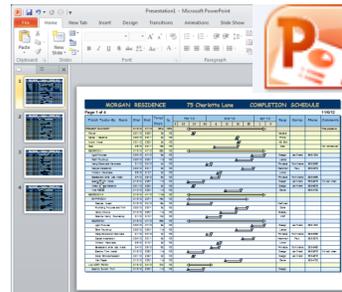
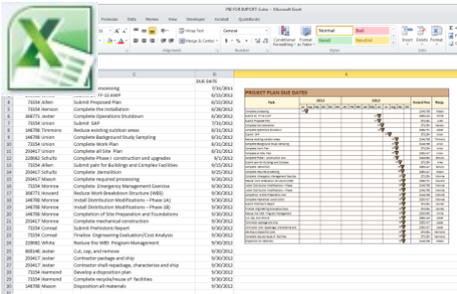
CHOOSE THE **CONNECTIONS** TAB TO:

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

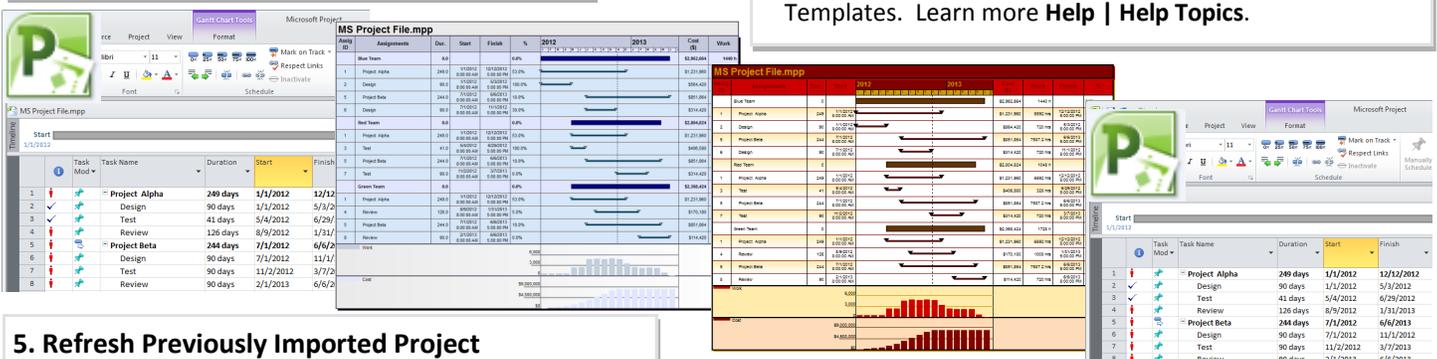
The Project to Milestones Wizard will open. A Milestones Professional schedule will be created using selections made in the wizard. Learn more [Help | Help Topics](#).

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](#).



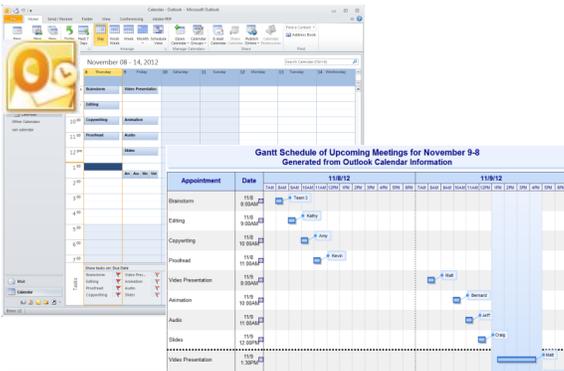
5. Refresh Previously Imported Project

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.

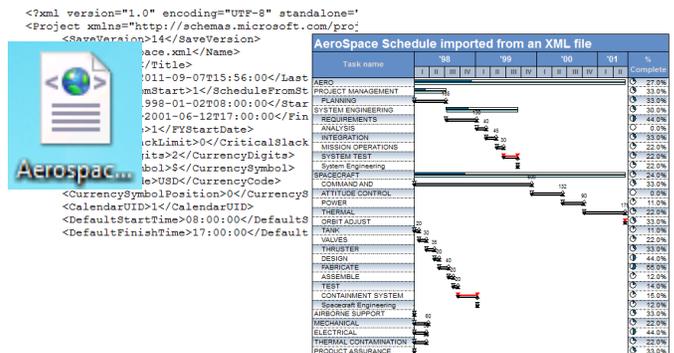


11. Import Outlook Tasks or Calendar

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.

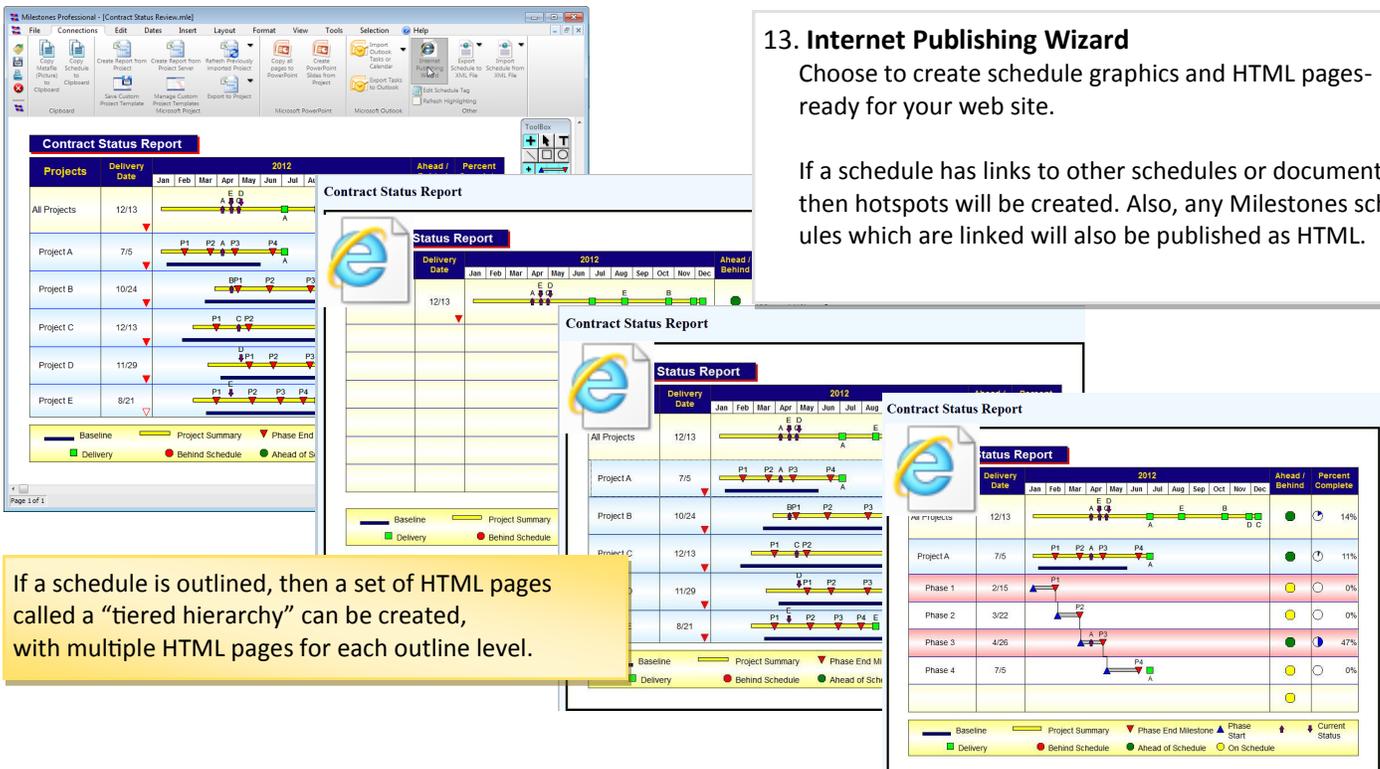
Choose from other XML import options.



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.

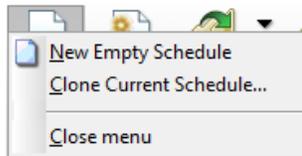


Getting Started with Milestones Professional Work with files and more using the *File* tab

CHOOSE THE **FILE** TAB TO:

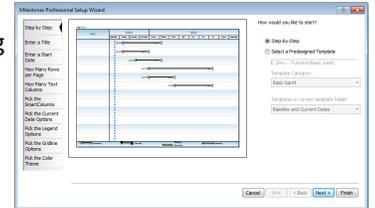
1. New

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- Guides you through setting up a schedule using **Step by Step** or a **Predesigned Template**.

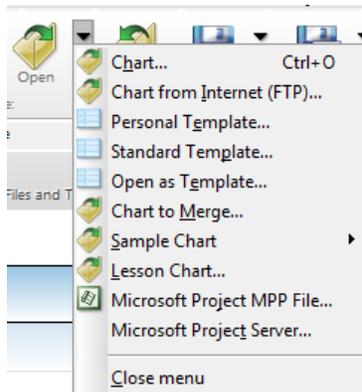


3. Open

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.



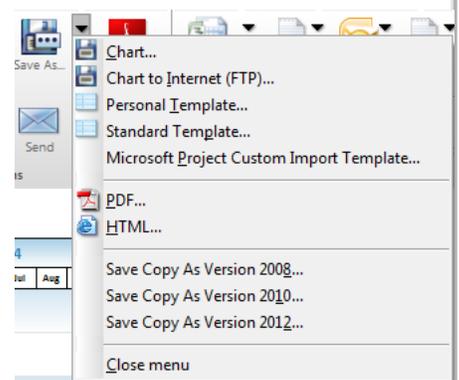
6. Save As

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.

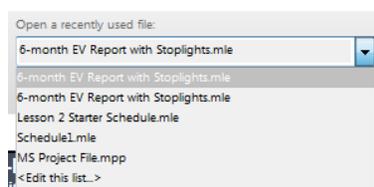
Save as **PDF** for easy sharing of a schedule.

Save as **HTML** to have the **Internet Publishing Wizard** start-up. Learn more about the wizard under **Help | Help Topics**.



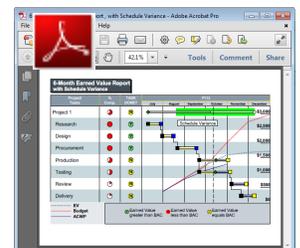
4. Open a Recently Used File

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.



7. Save As PDF

Save as **PDF** for easy sharing of your schedule.



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.

8. Import and Export options

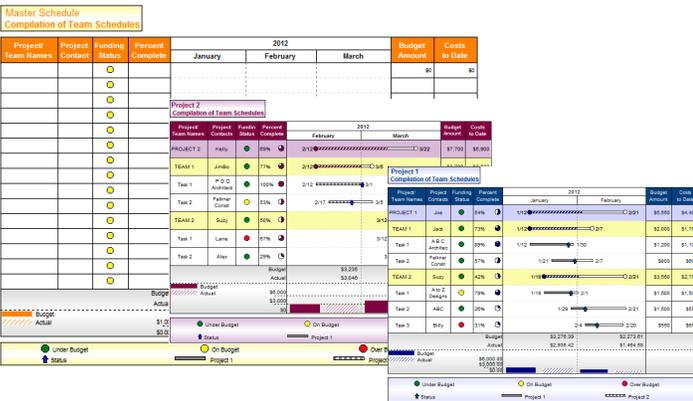
Choose from a variety of import and export options. Learn more about these under **Help | Help Topics**.

Getting Started with Milestones Professional Work with files and more using the *File* tab



9. Master Schedule

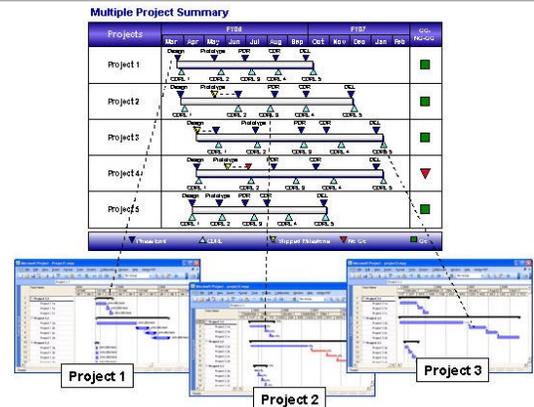
Choose to combine multiple Milestones schedules.



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**.



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**.

12. Printing

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

