

Milestones PROFESSIONAL® TUTORIALS

Lesson 16 - Microsoft Project to Milestones Wizard-Microsoft Project Installed

In this lesson you will learn how to:

- Import Microsoft Project MPP files into Milestones Professional using the import wizard.
- Customize the imported schedule.
- Save as a Custom Project Template.
- Import Microsoft Project MPP files using the new Custom Project Template.
- Change the Microsoft Project MPP file and update (“refresh”) the Milestones Professional schedule.

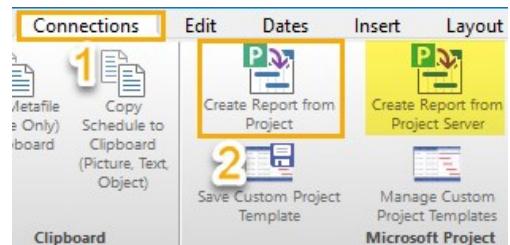
Import a Microsoft Project MPP

Important the Project to Milestones Wizard template options will be different based on whether Microsoft Project is installed or not installed on your computer.

- In Milestones Professional, choose the **Connections tab**.
- In the **Microsoft Project** section choose **Create Report from Project**.

If your files are in Project Server or Project Online first open it, then choose **Create Report from Project Server**. For this tutorial the Microsoft Project file to be imported is on your desk top so choose **Create Report from Project**.

- To select the file to import, navigate to **Program Files\KIDASA\Milestones Professional 2020\Samples\Lessons folder**. Select **MS Project File.mpp**. Choose **Open** The Microsoft Project to Milestones Wizard will display.



Microsoft Project to Milestones Wizard

The Microsoft Project to Milestones Wizard has four import options. **Try a built-in template**: Select from predesigned templates that import specific date fields and column information from Microsoft Project into a Milestones schedule. **Let the wizard guide you**: Step by step selection of how you want your Microsoft Project information imported into a Milestones schedule. **Make a swimlane chart**: Import multiple Microsoft Project tasks into a swimlane by coding fields in Microsoft Project to have specific date symbology and symbol and horizontal bar styles populate the Milestones schedule. **Use your own custom template**: Starting with a schedule imported using the wizard modify it to your liking then save it to use the next time you import.

- For **ID Field (required)**, choose **Uniqueid**.

Once a schedule is built it can be refreshed. In order for Milestones to connect to tasks in Microsoft Project it needs symbols and cells to be tagged with unique identifiers. Best practice is to use the Microsoft Project Unique ID field for the unique identifier.

- Leave **Nickname (optional)** blank.

Nickname (optional) - If you are going to combine 2 or more Milestones imported schedules that were generated from different Microsoft Project files use the nickname field. Give a nickname to each Microsoft Project file, enter it in the nickname field during import it will be applied to each symbol and cell along with the Unique ID.

- For **Outline level (optional)** choose **20**.

- Import Flag (optional) choose **all tasks**.

There are several options to limit the Microsoft Project information importing into a Milestones schedule. In Microsoft Project, filter the schedule save it then select it for importing. In the wizard limit the tasks by **Outline Level** or select a **Flag** field that has been set-up in Microsoft Project with yes applied to all tasks to be imported.

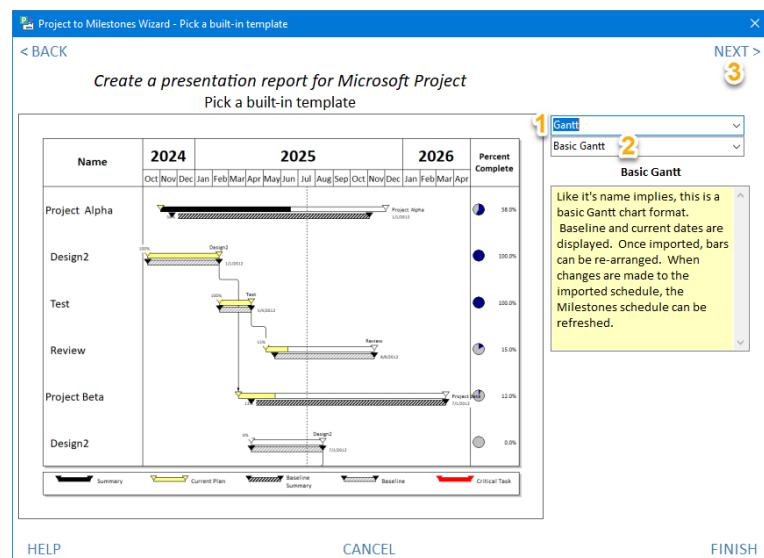
- Choose **Try a built-in template**. The Project to Milestones Wizard - Pick a built-in template dialog displays.

Project to Milestones Wizard - Pick a built-in template dialog

The **Project to Milestones Wizard, Built in template** option has 10 categories to choose from and each **Category** has a variety of chart **Types**. As the category and type are selected the wizard displays a picture of the selection.

Make the following selections:

1. Choose **Gantt**.
2. Choose **Basic Gantt**.
3. Choose **Next**. The **Project to Milestones Wizard - Pick symbology options** dialog displays.



Project to Milestones Wizard - Pick symbology options dialog

1. For **Summary Bars** choose **Project**.

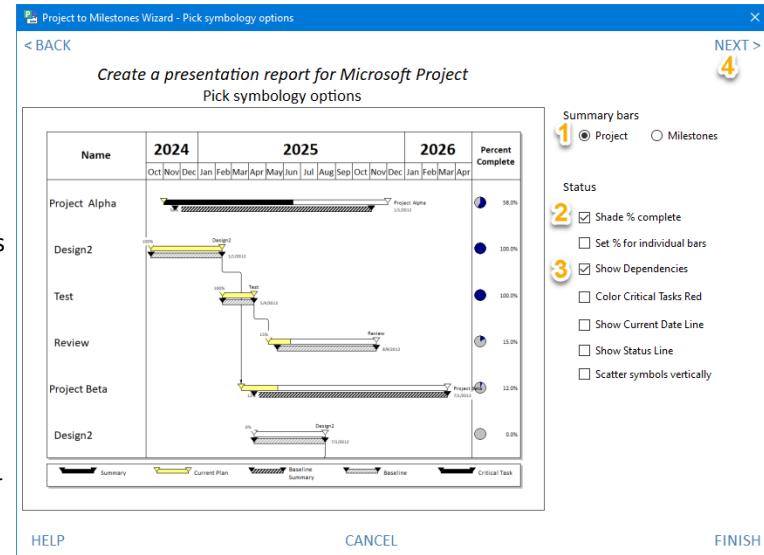
Summary information will be drawn from Microsoft Project information and symbols and bars are independent of lower level information. If **Milestones** is selected the summary bars displayed are reflections of the lower level tasks and can only be changed by moving the lower level tasks.

2. Check on **Shade % complete** - Symbols and horizontal bars color based on the percent complete of the task.

Set % for individual bars should be selected when multiple tasks are placed on a single Milestones task row. For instance you are going to import the schedule then move tasks from their individual rows to a shared task row.

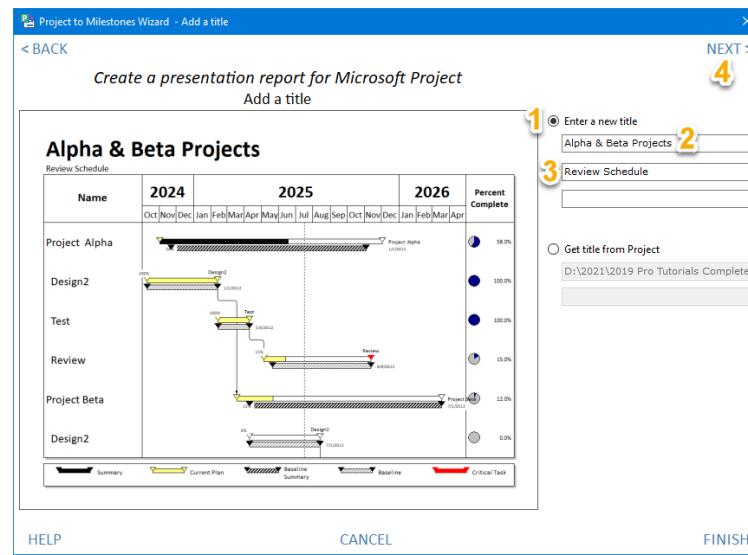
3. Check on **Show Dependencies** - Dependent symbols (successors) will be linked with vertical links.

4. Choose **Next**. The **Project to Milestones Wizard - Add a title** dialog displays.



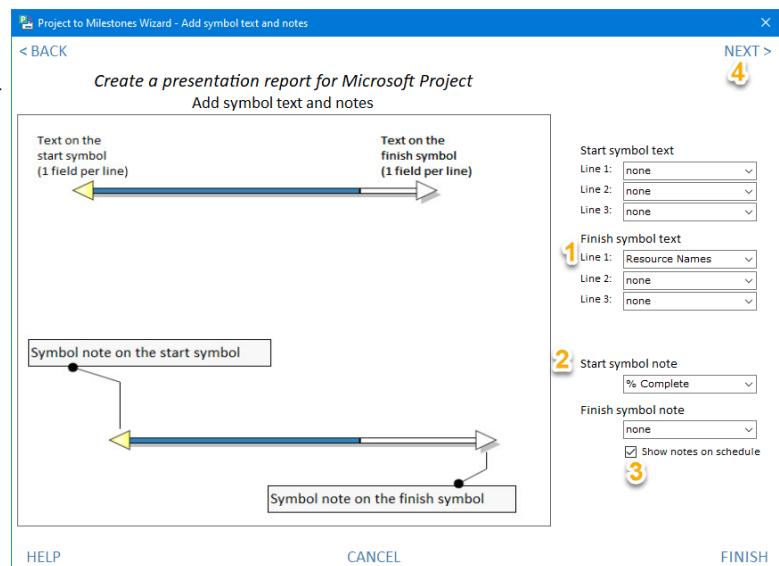
Project to Milestones Wizard - Add a Title dialog

1. Select **Enter a new title**.
2. In the first blank section, this will be line 1 of the schedule's title, type in **Alpha & Beta Projects**.
3. In the second blank section, this will be line 2 of the schedule's title, type in **Review Schedule**.
4. Choose **Next**. The **Project to Milestones Wizard - Add symbol text and notes** dialog displays.



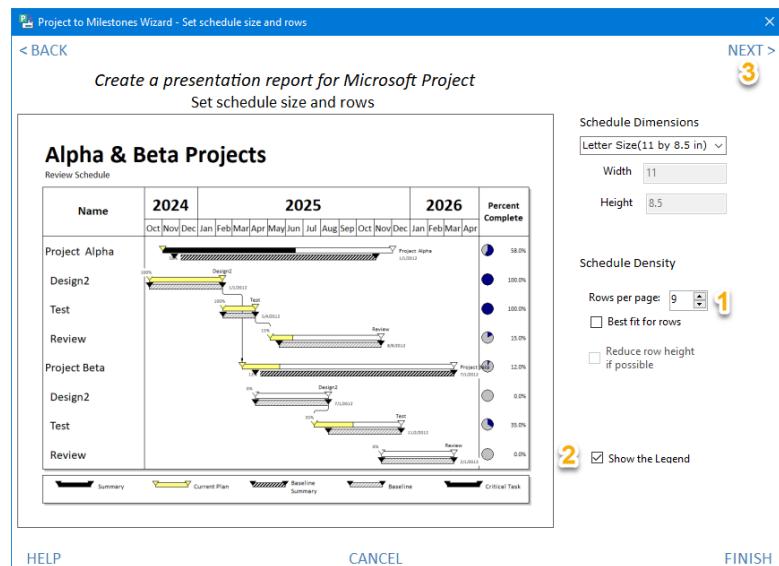
The Project to Milestones Wizard - Add symbol text and notes dialog

- Under **Finish symbol text - Line 1:** choose from the drop down list **Resource Names**. If a resource name is associated with a task in Microsoft Project that name will populate as symbol text for the finish symbol. The placement of the text to the symbol is based on the parameters set for that symbol in the Milestones schedule's toolbox.
- Under **Start symbol note** choose from the drop down list **% Complete**. The % complete for the Microsoft Project task will populate as a symbol note for the start symbol.
- Symbol notes can be hidden or shown. Check on **Show notes on schedule**, to have the note display near the start symbol. Once the schedule is imported, the note can be dragged anywhere on the schedule and is still attached to its symbol.
- Choose **Next**. The **Project to Milestones Wizard - Set schedule size and rows** dialog displays.



The Project to Milestones Wizard - Set schedule size and rows dialog

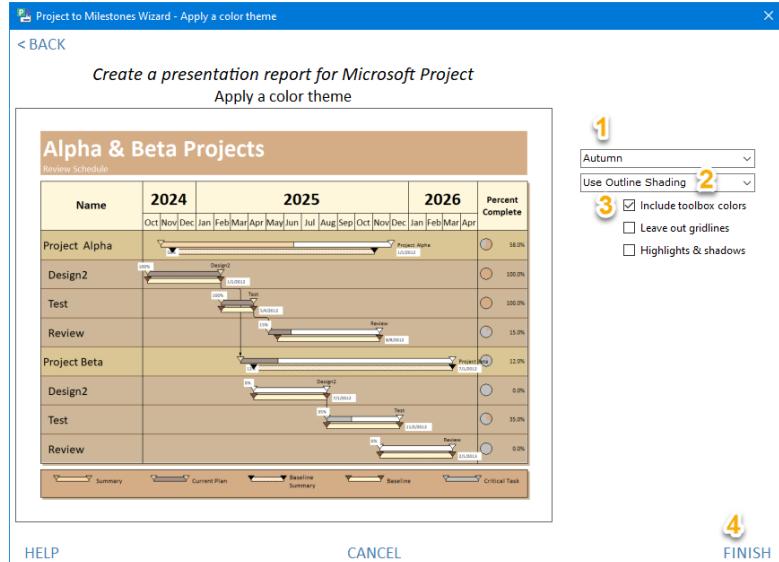
- For **Rows per page** choose **9**.
- Check on **Show the Legend**.
- Choose **Next**. The **Project to Milestones Wizard - Apply a color theme** dialog displays.



The Project to Milestones Wizard - Apply a color theme dialog

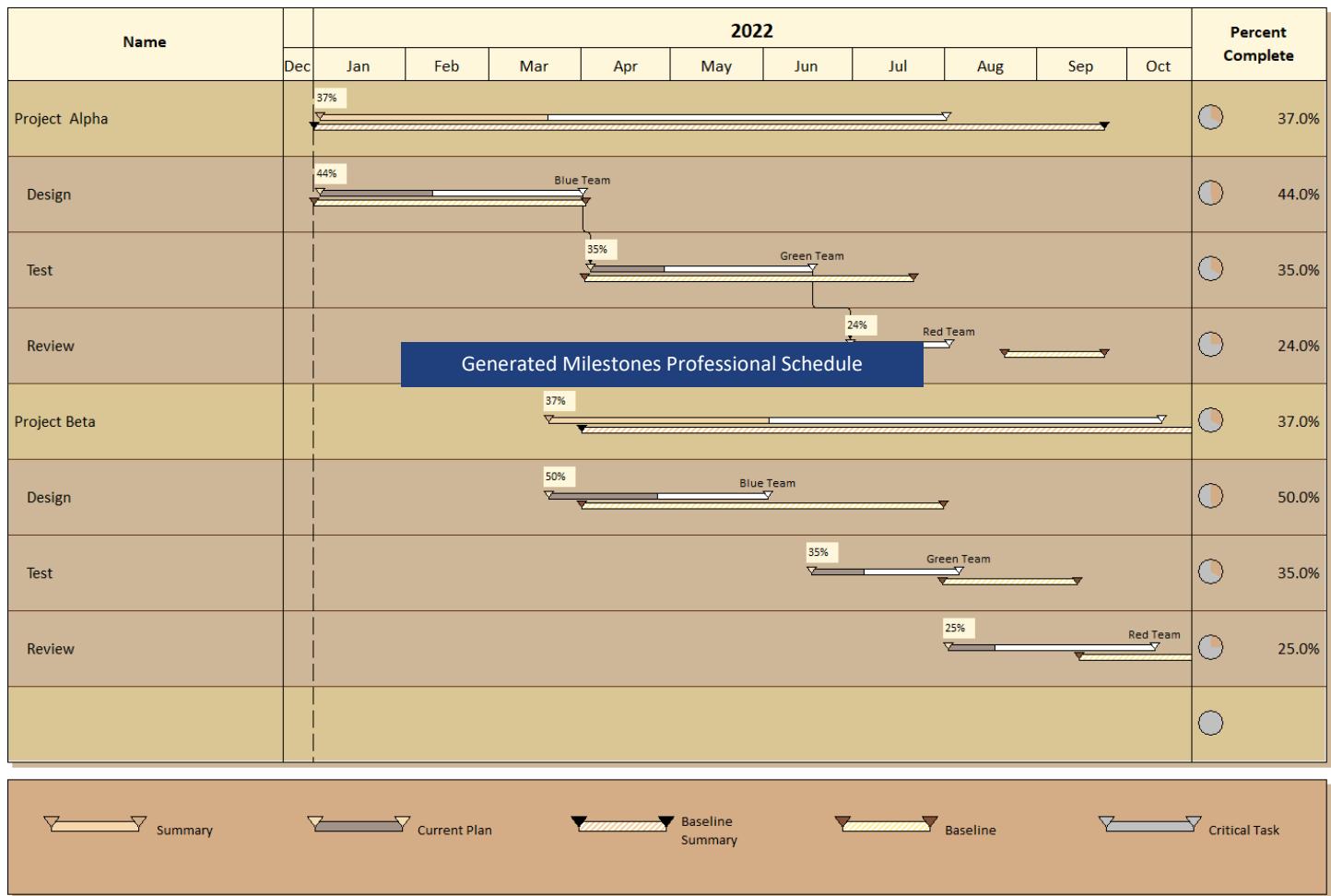
- Under **Apply a color theme** choose **Autumn**.
- Choose **Use Outline Shading**.
- Check on **Include toolbox colors**.
- Choose **Finish**.

Milestones will now generate the schedule found on the following page.



Alpha & Beta Projects

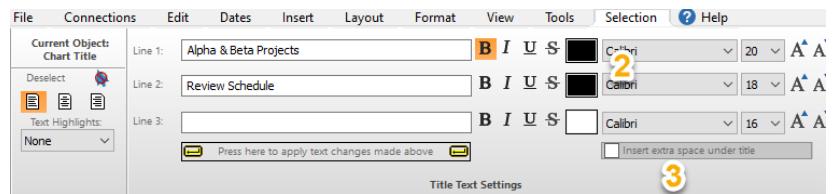
Review Schedule



Customize the imported schedule

Change the Title

1. Click the title. The toolbar at the top of the Milestones window is now active for the title.
2. Change the text color in **Line 1** and **Line 2** to black.
3. Uncheck **Insert extra space under title**.

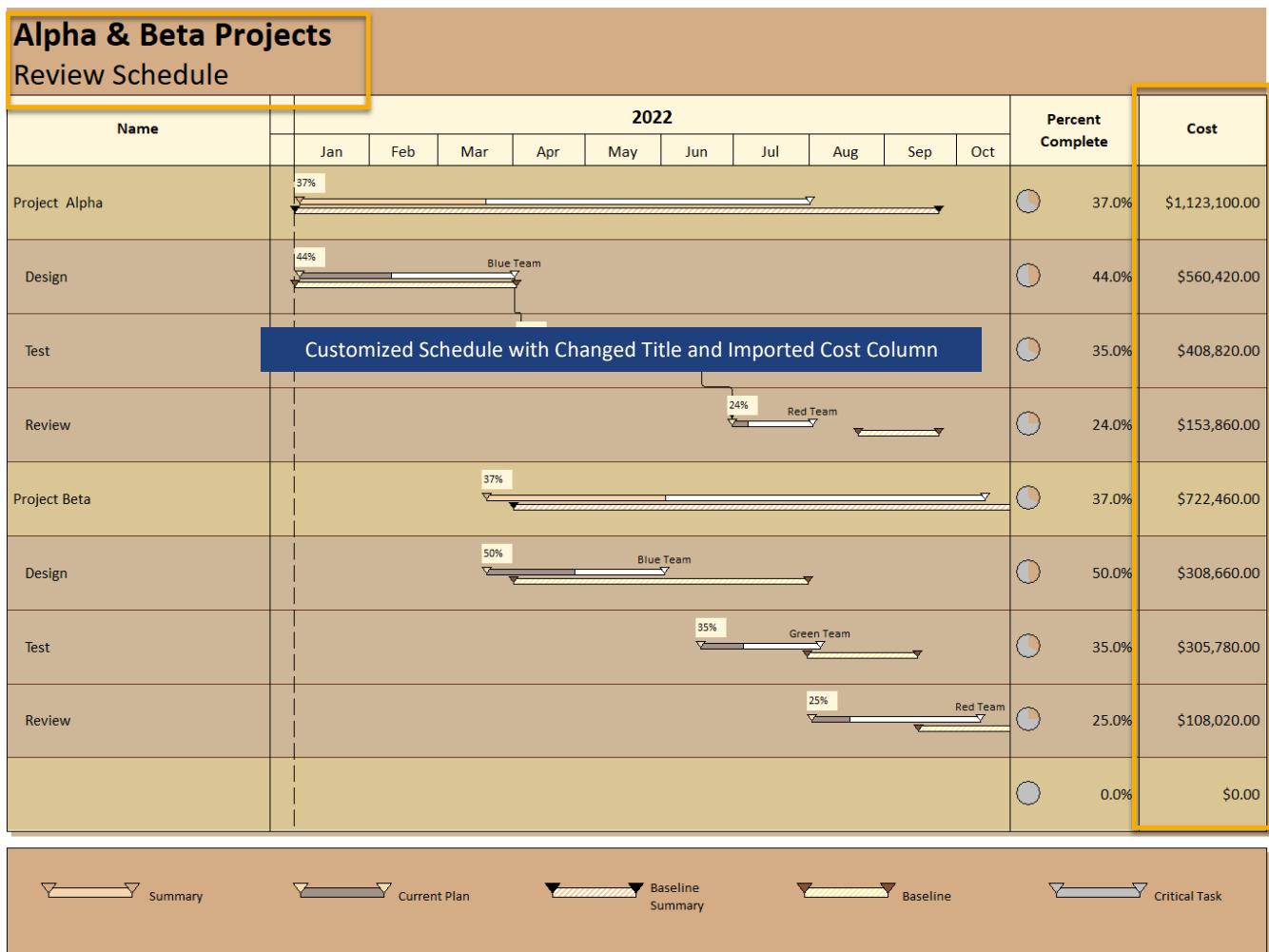


Alpha & Beta Projects 1
Review Schedule

Customize the imported schedule cont'd

Add Cost column getting the information from the Microsoft Project file

1. If the **MS Project File.mpp** is not still opened open it. **Program Files\KIDASA\Milestones Professional 2020\Samples\Lessons folder**. Select **MS Project File.mpp**.
2. Go back to the Milestones schedule and save it. Choose the **File** tab choose **Save As** choose **Chart**.
3. Click the **Connections** tab in the **Other** section check on **Populate Column from Project when column tag added**.
4. Click on **Percent Complete** column heading (it will highlight). This action is to place the column to be added to the right of the Percent Complete column.
5. Choose the **Insert** tab.
6. In the **Rows, Columns** section choose **New Column**, a drop down menu displays choose **Microsoft Project Column**.
7. The **Column Properties** dialog box displays with a drop down menu activated, choose **Cost**.
8. Choose **OK**.
9. The **Populate this column** dialog box displays verifying the **Field name:** (**Cost** in this instance) that will populate the column, as well as a selection menu for the **Unique ID** field to be used to tag each cell in the column. By default the field used in the original import will show (**UniqueId** in this instance).
10. Choose **Finish**. The column will be inserted, and will be populated with the Microsoft Project cost information. It will also be tagged for future Refresh if the Microsoft Project information changes.
11. You may need to expand the column. Move the cursor to the left edge of the column, when you get the **↔ column width change** cursor drag the column to the left.
12. Keep the Milestones file open to continue with the next portion of this tutorial.



Save as a Custom Project Template.

Now that you have your schedule looking exactly how you want, it can be saved as a **Custom Project Template**. Saving the schedule as **Custom Project Template** adds the schedule into the **Project to Milestones Wizard**. Once saved, next time you use the **Project to Milestones Wizard** it will be available in the **Use your own custom template** option for import of another Microsoft Project file.

1. Choose the **Connections** tab.
2. In the **Microsoft Project** section choose **Save Custom Project Template**.
3. The **Microsoft Project Custom Import Template Description** dialog box displays. Enter a description for your template like "**My template with start, end, baseline start end bars and cost column.**"
4. Choose **OK**.
5. The **Save Chart File** dialog box displays.

Important:

Save all Custom Project Templates to a folder that you will not delete or move. This should not be the same folder where you save your working Milestones Professional files.

If an initial import file has more than one page and you want to use it as a Custom Project Template delete all but one page of the schedule before saving it as a Custom Project Templates .

If you save a Custom Project Template and no longer want to see it in the wizard Use the **Manage Custom Project Templates** option found on the **Connections** tab in the **Microsoft Project** section.

6. Give your template a name **CustomTemplateAlpha&Beta**.
7. Choose **Save**.
8. Close the schedule.

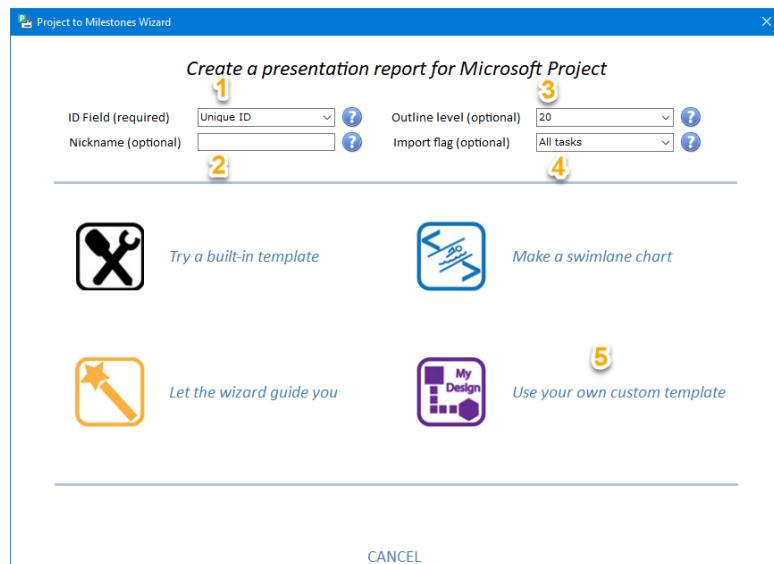
Import Microsoft Project MPP files using the Use Your Own Custom Template Option

Now you will import the **MS Project file.mpp** into the Custom Project Template, **CustomTemplateAlpha&Beta** you just created.

1. In Milestones Professional, choose the **Connections** tab.
2. In the **Microsoft Office Project** section choose **Create Report from Project**. The **Select the schedule to open** dialog box displays.
3. Navigate to the **Program Files\KIDASA\Milestones Professional 2019\Samples\Lesson folder**.
4. Select the **MS Project File.mpp** file. The **Project to Milestones Wizard** will display.

Project to Milestones Wizard

1. For **ID Field (required)** , choose **Uniqueid**.
2. Leave **Nickname (optional)** blank.
3. For **Outline level (optional)** choose **20**. For **Tag** .
4. **Import Flag (optional)** choose **All Tasks**.
5. Choose **Use your own custom template**. The **Project to Milestones Wizard - Custom template options** dialog displays.



The Project to Milestones Wizard - Custom template options dialog

- At the top of the dialog click the down arrow to select the saved custom template, **CustomTemplateAlpha&Beta.mlj**. Note that the Wizard displays a picture of the CustomTemplateAlpha&Beta.mlj.

- Under **Finish Symbol Text**, next to 1: Click the down arrow then select **Duration**.

Even if your template has symbol and note text from the initial import, you still must select the symbol or note text in this dialog to have text display on the generated schedule.

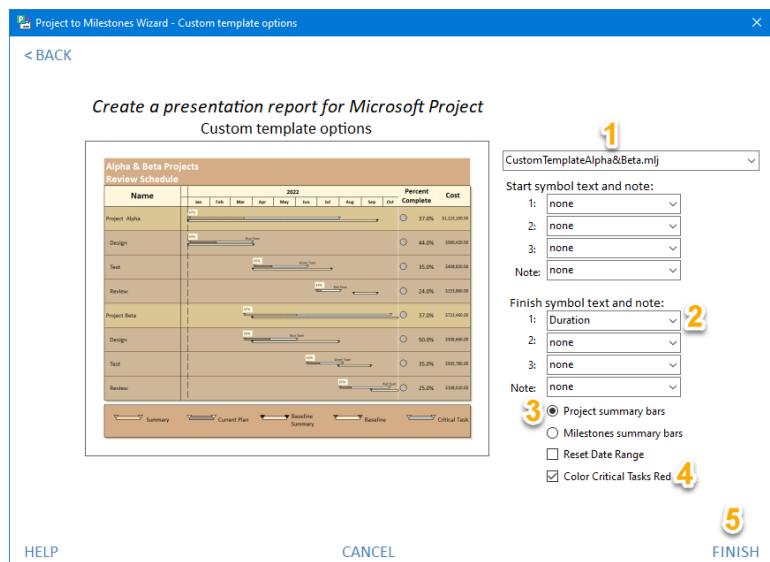
- Choose **Project summary bars**.

Select this option to have all Microsoft Project tasks marked as critical color red in the generated Milestone file.

- Check on **Color Critical Tasks Red**.

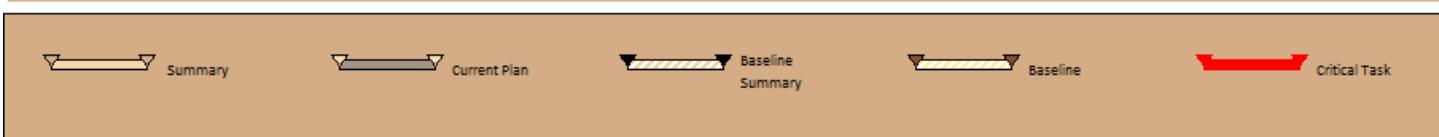
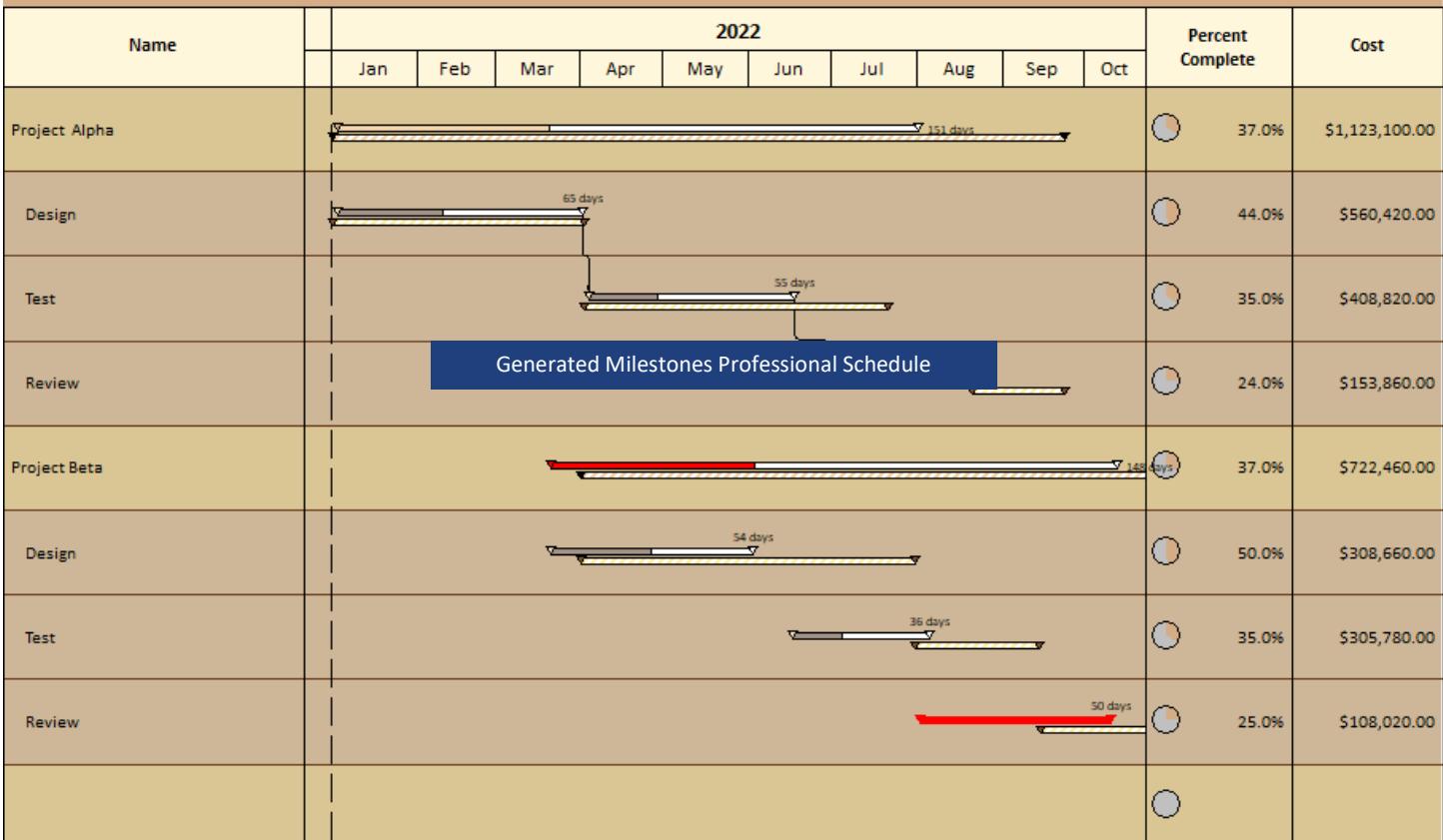
- Choose **Finish**. Choose **Finish**. The generated file (see below) will look like the saved Custom Project Template, CustomTemplateAlpha&Beta.mlj, with the exception of the new options selected; critical task colored red and the task duration as symbol text on the finish symbols.

- Save this file to a different location than where you saved the Custom Project Template. Choose **Save As**. Choose **Chart**. Call the schedule **Alpha & Beta Projects**. You will use this schedule later in the tutorial, keep it opened.



Alpha & Beta Projects

Review Schedule



Refresh an imported Milestones Professional schedule when the Microsoft Project file has been changed

Change the Microsoft Project file

1. Bring up the Microsoft Project file **MS Project.mpp**. If you closed it navigate to the **Program Files\KIDASA\Milestones Professional 2019\Samples\Lessons folder** to open it. If you do not want to make the changes yourself you can skip this section and find a changed file in **Program Files\KIDASA\Milestones Professional 2019\Samples\Lessons folder** called **MS Project File Changed.mpp**.

2. Make the following change to: **Program Files\KIDASA\Milestones Professional 2019\Samples\Lessons folder**

Project Beta tasks:

- a. Design **Finish Date** changed from 6/02/22 to **7/02/22**. Because of this change the following other items changed
 - Design % **Complete** changed from 50% to **36%**.
 - Design **Duration** changed from 54 days to **76 days**.
 - Design **Cost** changed from \$308,660 to **\$312,180**.

- b. Test **Finish Date** changed from 8/05/22 to **9/05/22**. Because of this change the following other items changed

- Design % **Complete** changed from 35% to **22%**.
- Design **Duration** changed from 36 days to **57 days**.
- Design **Cost** changed from \$305,780 to **\$309,140**.

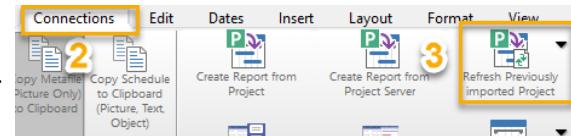
Because of the above a and b changes the following items in **Project Beta** summary changed

- **Project Beta % Complete** changed from 37% to **28%**.
- **Project Beta Cost** changed from \$722,460 to **\$729,340**.

3. Choose **Save as** and save this file to your desktop as **MS Project File Changed.mpp**.

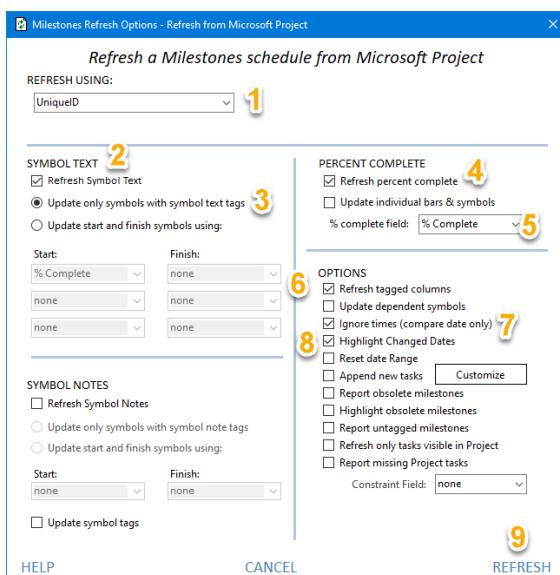
Refresh the Milestones Professional schedule to reflect the changes made to the Microsoft Project file

1. Go back to Milestones Professional **Alpha & Beta Projects.mjl** schedule should still be opened. If not open it.
2. Choose the **Connections** tab.
3. In the **Microsoft Project** section choose **Refresh Previously imported Project**.
4. From the drop down choose **Refresh from MPP/MPD File...** the **Select Schedule to Open** dialog box displays.
5. Select **MS Project File Changed.mpp** saved to your desktop or **Program Files\KIDASA\Milestones Professional 2019\Samples\Lessons folder** called **MS Project File Changed.mpp**.
6. Choose **Open**. The Refresh Microsoft Project dialog displays.



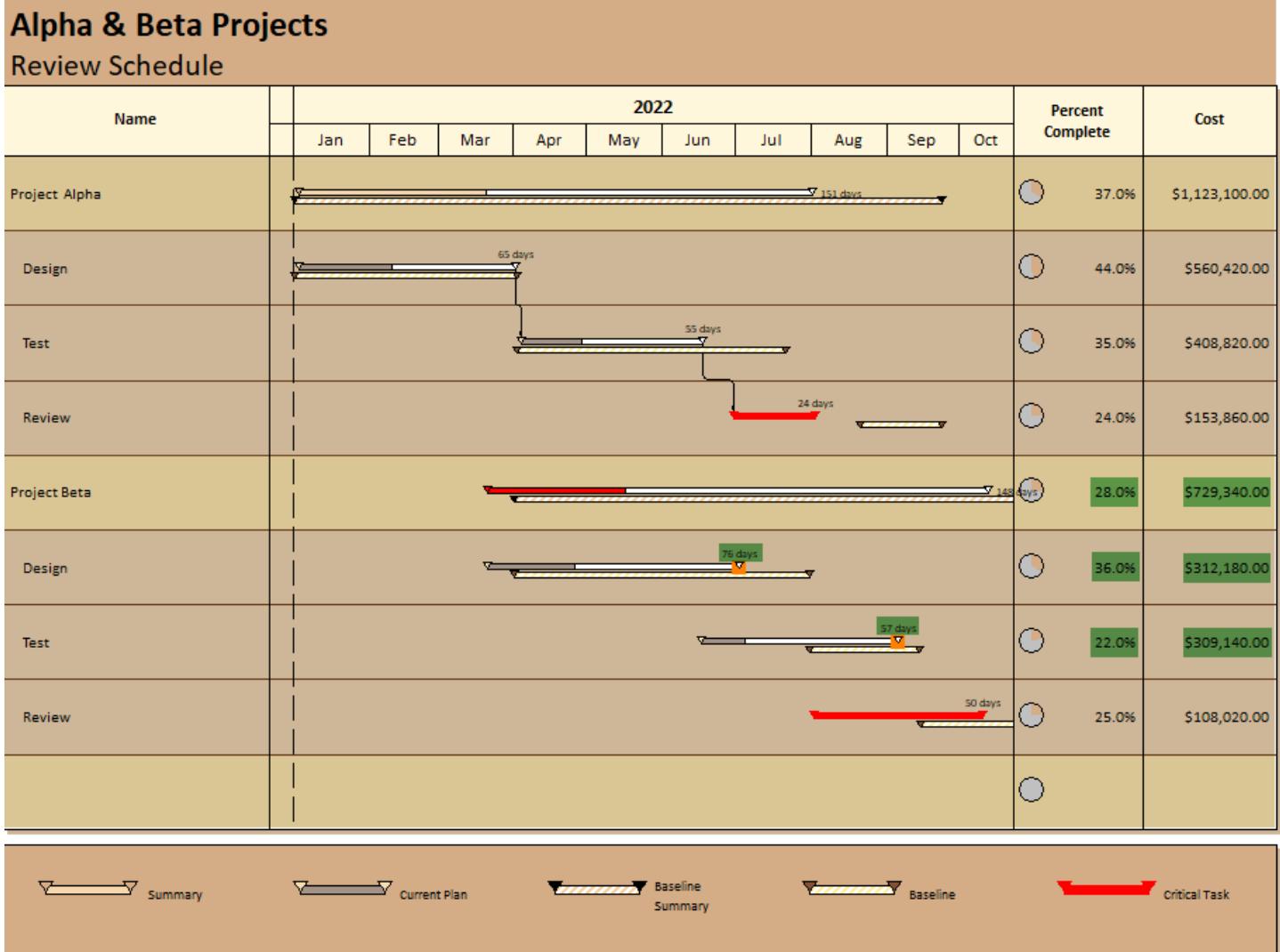
The Refresh Microsoft Project dialog

1. For **REFRESH USING** : select **UniqueID**. You should always select the unique identifier used in the original import.
2. Under **SYMBOL TEXT** check on **Refresh Symbol Text**.
3. Under **SYMBOL TEXT** choose: **Update only symbols with symbol text tags**. This is necessary as duration values in the Microsoft Project file changed, thus the duration values as symbol text on the Milestones schedule need to be updated.
4. Under **PERCENT COMPLETE**: Check on **Refresh percent complete**.
5. Under **Percent Complete** for the **% complete field** choose **% Complete**. This is necessary to have fill to status of the symbols and horizontal bars update.
6. Under **OPTIONS** check on **Refresh tagged columns**. To have the information in the Milestones Cost and Percent Complete columns update based on the changes in the Microsoft Project file.
7. Under **OPTIONS** check on **Ignore times (compare dates only)**.
8. Under **OPTIONS** Check on **Highlight Changed Dates**. Milestones will highlight any changed dates in orange.
9. Choose **REFRESH**. The schedule will be generated and a Refresh report will also be generated. See the next page to view the Refreshed Milestones schedule and Refresh Report.



The generated schedule shows the finish dates that were changed highlighted in orange by Milestones Refresh option.
 Note: We have highlighted in green the changes in the symbol text duration values and the Percent Complete and Cost column value changes.

To turn off orange highlighting choose the **Connections** tab in the **Other** section uncheck **Refresh Highlighting**.
 Highlighting does not save when the file is saved.



The Refresh Report shows:

1. The change to what symbol, the old and new date, symbol or note text change.
2. The % change for the tasks.
3. The Refresh Report can be printed.

