

Milestones PROFESSIONAL[®] TUTORIALS

Lesson 19 - Microsoft Project to Milestones Wizard - Microsoft Project Not installed

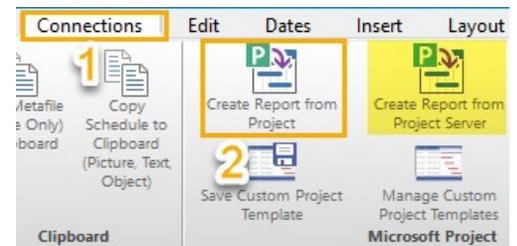
In this lesson you will learn how to:

- 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.
- Use a changed Microsoft Project MPP file to update (“refresh”) the Milestones Professional schedule.

Import a Microsoft Project MPP

Important This lesson is only for importing an MPP file when Microsoft Project is NOT installed on your computer. If you have Microsoft Project, go to lesson 16.

1. In Milestones Professional, choose the **Connections** tab.
2. In the **Microsoft Project** section choose **Create Report from Project**. The **Import a Microsoft Project MPP file** dialog box displays.
3. Choose the browse button and navigate to the **Program Files\KIDASA\Milestones Professional 2021\Samples\Lesson folder**. Select **MS Project File.mpp**.
4. Choose **Continue**.
5. The **Microsoft Project to Milestones Wizard** will display.



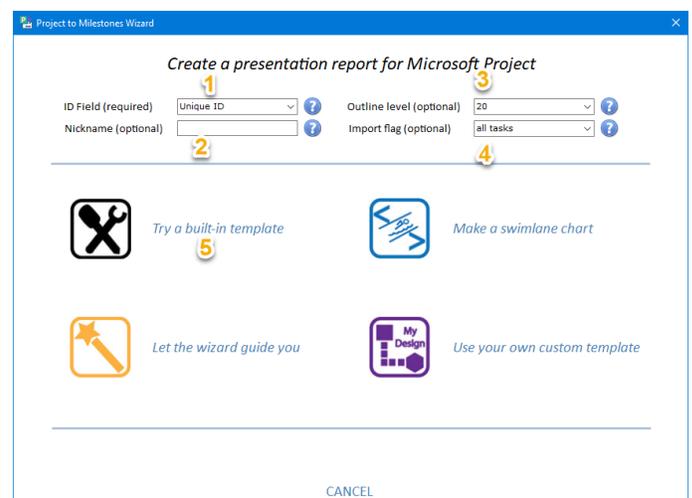
Microsoft Project to Milestones Wizard

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:** Only works if Microsoft Project is installed on your computer. **Use your own custom template:** Starting with a schedule imported using the wizard then modified to your liking then saved to use the next time you import.

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

Once a schedule is built it can be refreshed. In order for Milestones to have the connection to the 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.

2. **Nickname (optional)**, this option is only available if Microsoft Project is installed.
3. For **Outline level (optional)**, choose **20**.
4. **Import Flag (optional)**, choose **All Tasks**.
5. Choose **Try a built-in template**.
6. The **Project to Milestones Wizard - Pick a built-in template** dialog displays.

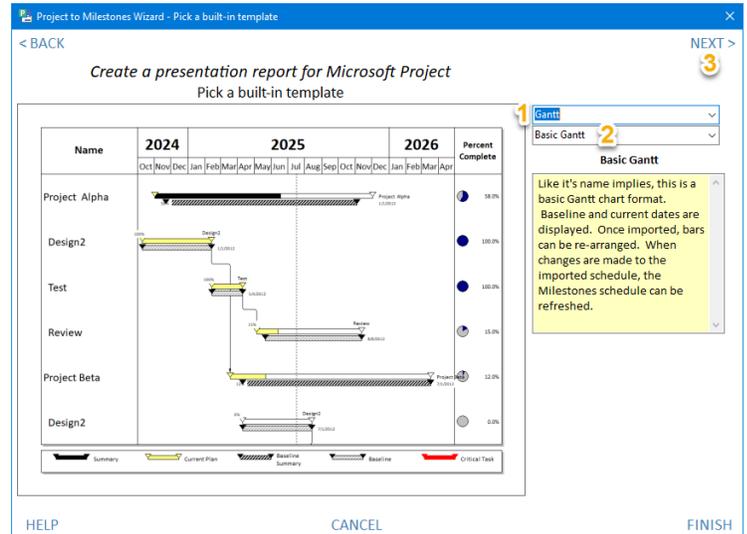


Project to Milestones Wizard - Pick a built-in template dialog

The **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

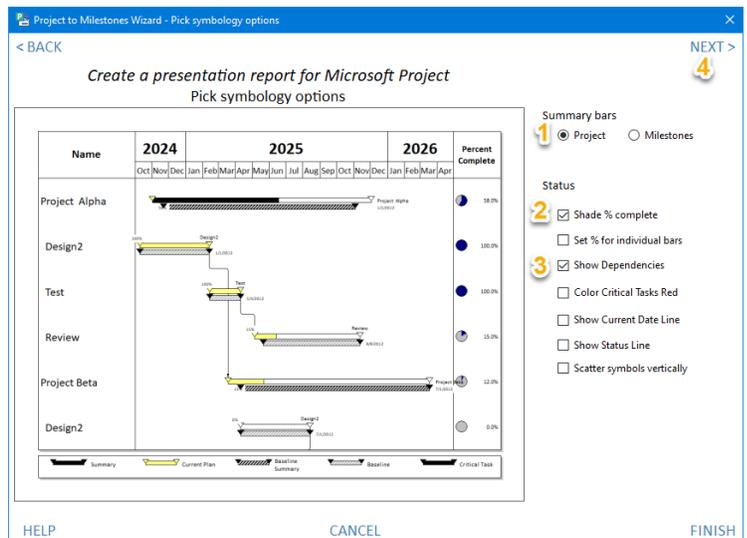
1. For **Summary Bars** choose **Project**.

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.

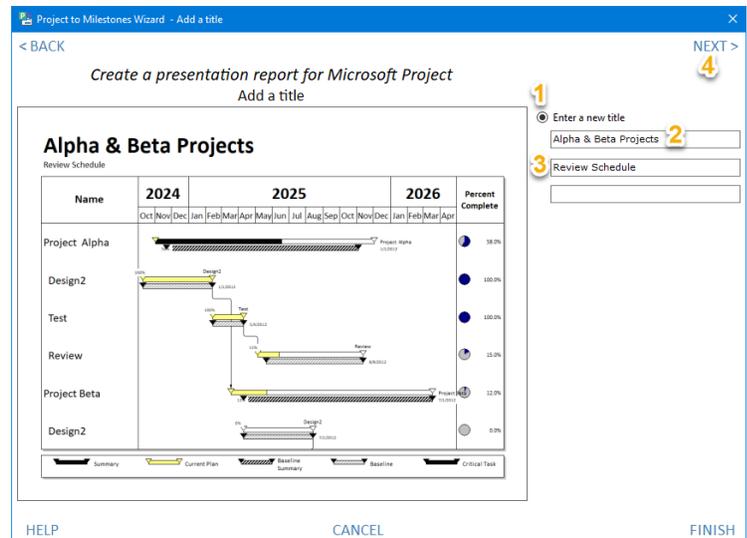
Set % for individual bars should be selected when multiple tasks are placed on a single Milestones task row.

3. Check on **Show Dependencies** - Dependent symbols (successors) will be linked with vertical links.
4. Choose **Next**.
5. The **Project to Milestones Wizard - Add a title** dialog displays.



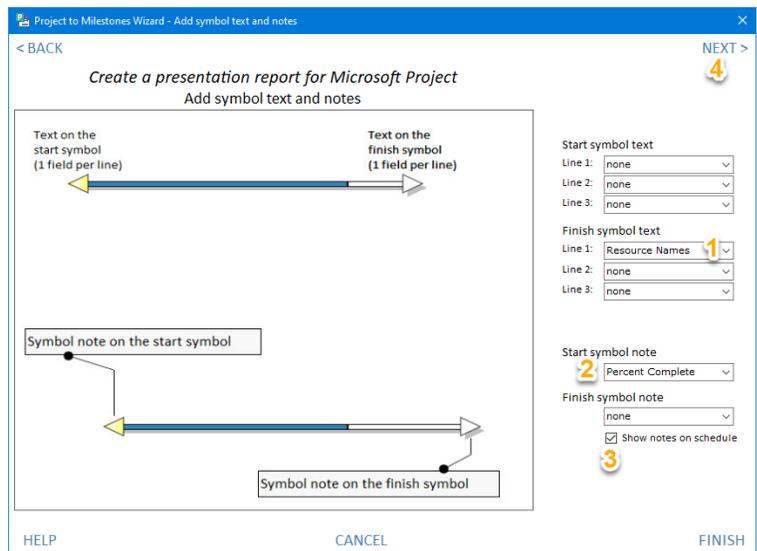
Project to Milestones Wizard - Add a Title dialog

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**.
5. The **Project to Milestones Wizard - Add symbol text and notes** dialog displays.



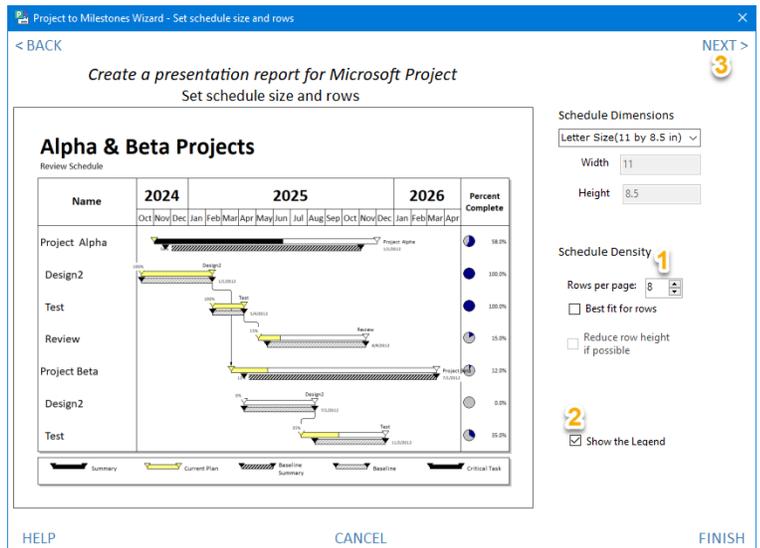
The Project to Milestones Wizard - Add symbol text and notes dialog

- Under **Finish symbol text - Line 1**: choose **Resource Names** from the drop down list. The task's resource names will populate as symbol text for the finish symbol. The placement of the text to the symbol is based on the symbol's settings in the Milestones schedule's toolbox.
- Under **Start symbol note** choose **Percent Complete** from the drop down list. The % complete for the Microsoft Project task will populate as a symbol note for the start symbol.
- 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 - Layout options** dialog displays.



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

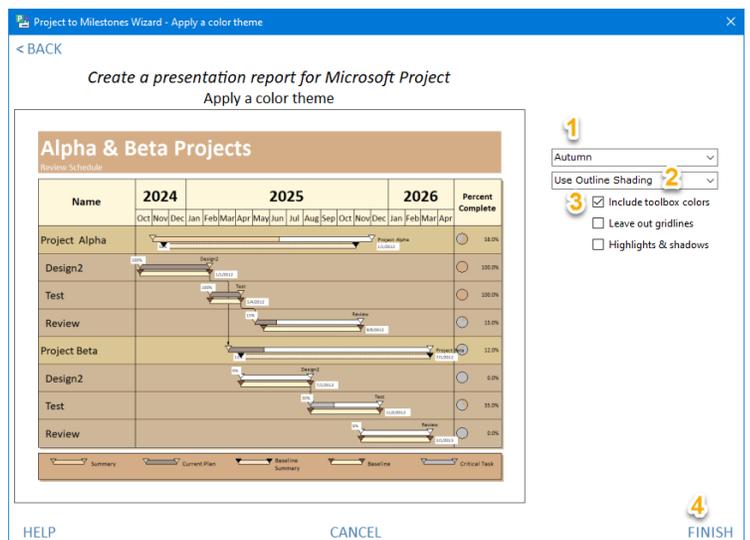
- For **Rows per page** choose **8**.
- Check on **Show the Legend**.
- Choose **Next**. The **Project to Milestones Wizard - Apply a color theme** dialog displays.



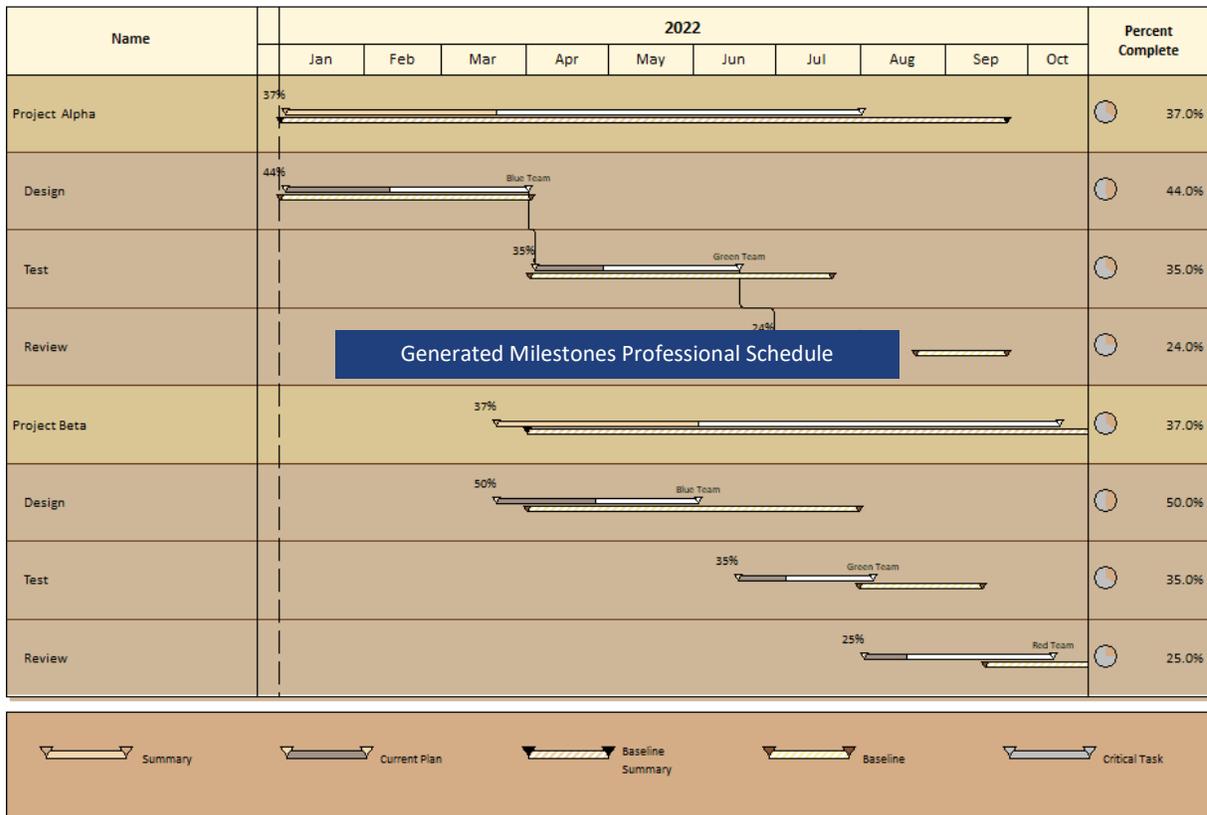
The Project to Milestones Wizard - Apply a color theme dialog

- 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.



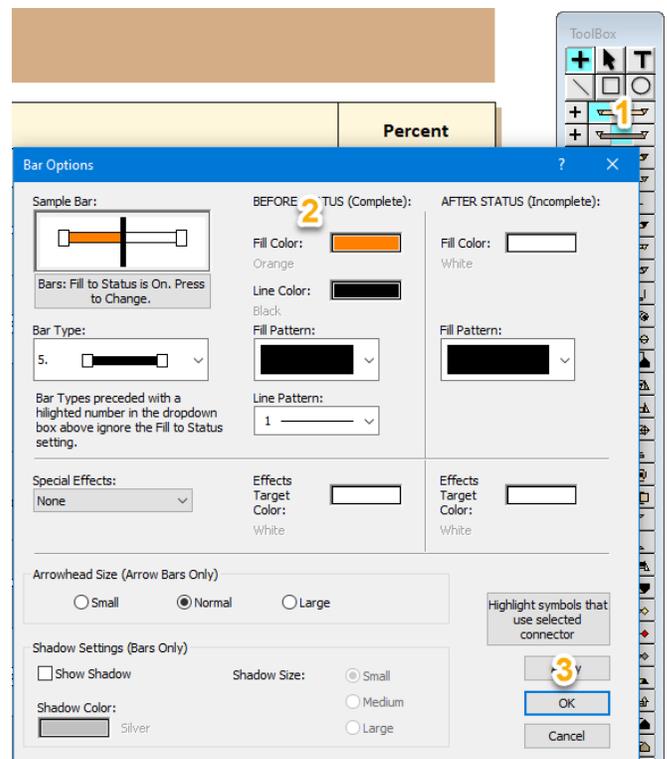
Alpha & Beta Projects Review Schedule



Customize the imported schedule

Change the Bar Color

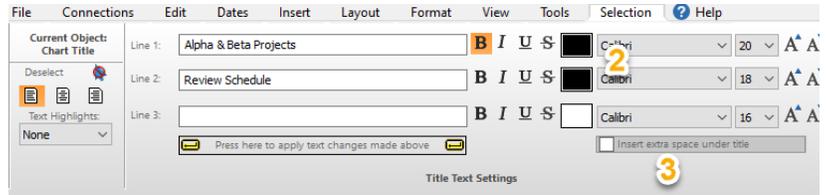
1. Double click the second horizontal bar in the toolbox. The Bar options dialog displays.
2. Change the **Fill Color** to orange.
3. Choose **OK**.
4. All bars on the schedule using the second horizontal bar in the toolbox are now orange.



Customize the imported schedule (continued)

Change the Title

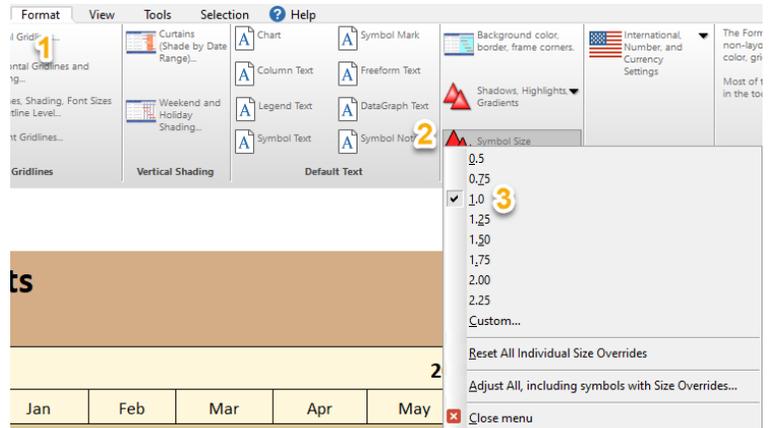
1. Click the title. The toolbar at the top of the Milestones window is now active for the title.
2. Change the text color in **Line 1** and **Line 2** to black.
3. Uncheck **Insert extra space under title**.



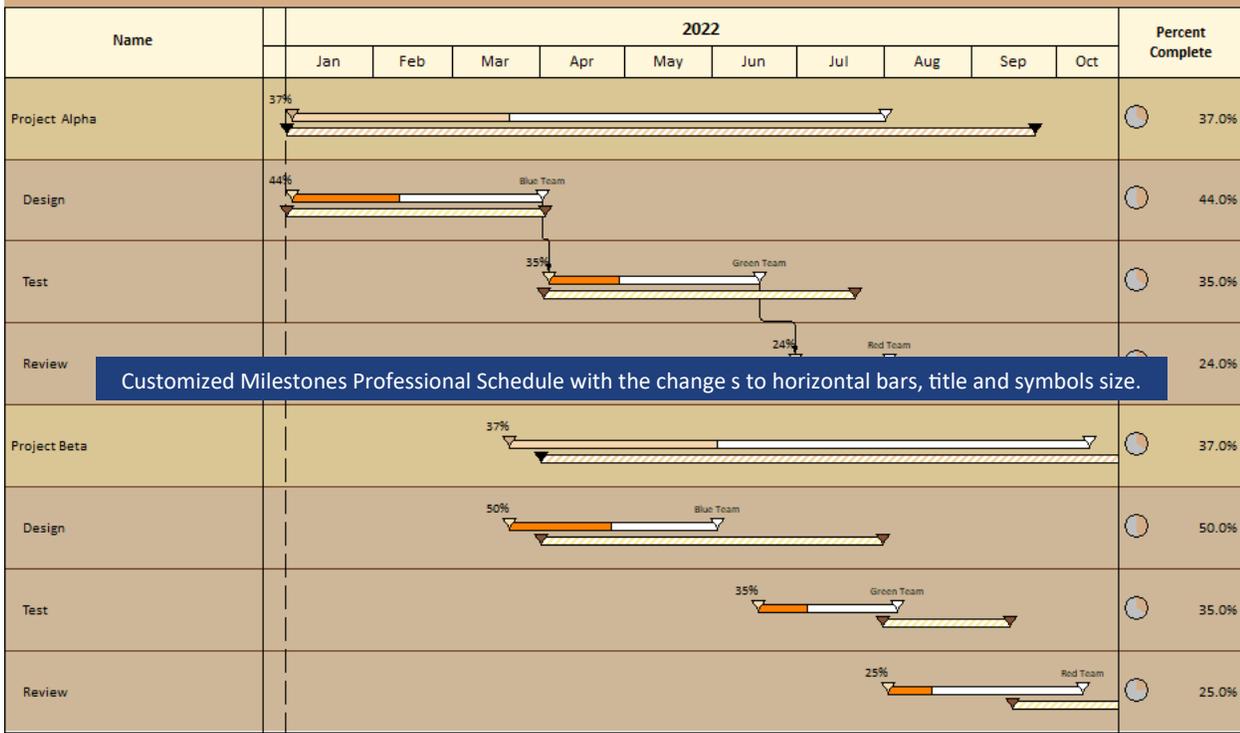
Alpha & Beta Projects Review Schedule

Change the Symbol Size

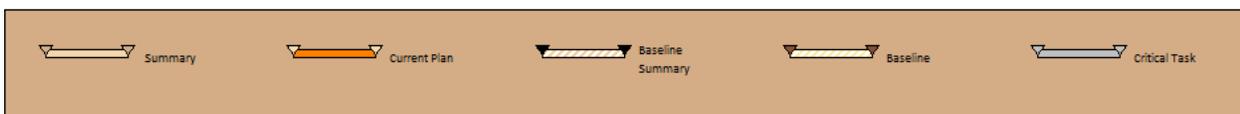
1. Choose the **Format** tab.
2. In the Frame, Highlights section select **Symbol Size**.
3. In the drop down that displays select **1.0**.
4. Below is the Customized schedule.
5. Keep the Milestones file open to continue with the next portion of this tutorial.



Alpha & Beta Projects Review Schedule



Customized Milestones Professional Schedule with the changes to horizontal bars, title and symbols size.



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.”**
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.

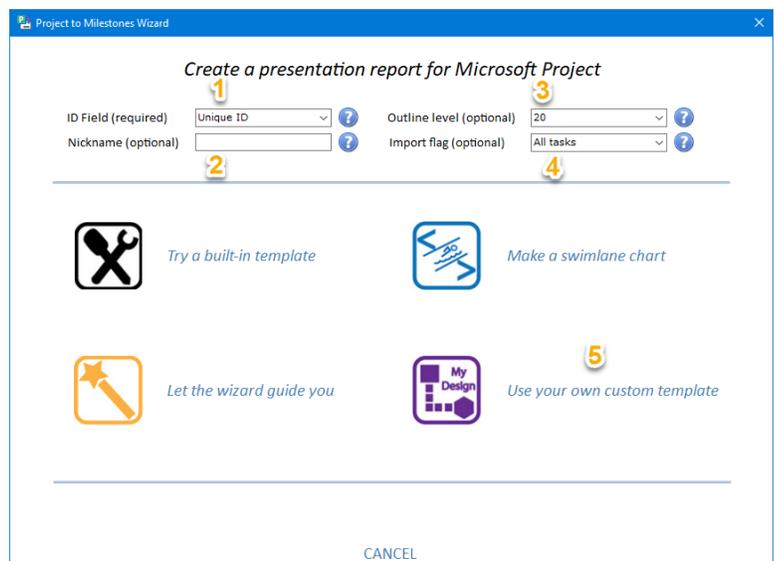
Import Microsoft Project MPP files using the new Custom Project Template

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 **Import a Microsoft Project MPP file** dialog box displays.
3. Choose the browse button and navigate to the **Program Files\KIDASA\Milestones Professional 2021\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

1. 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.

2. Under **Start Symbol Text**, next to 1: Click the down arrow and then select **Percent Complete**.

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.

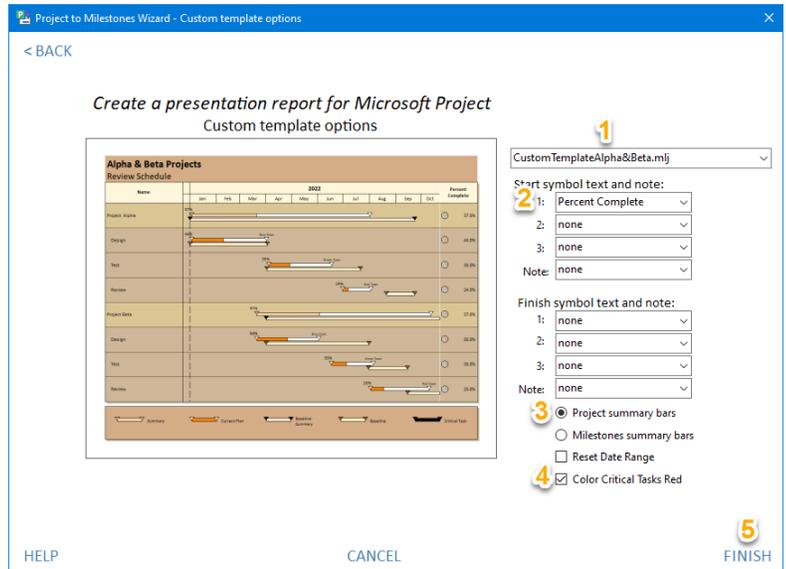
3. Choose **Project summary bars**.

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

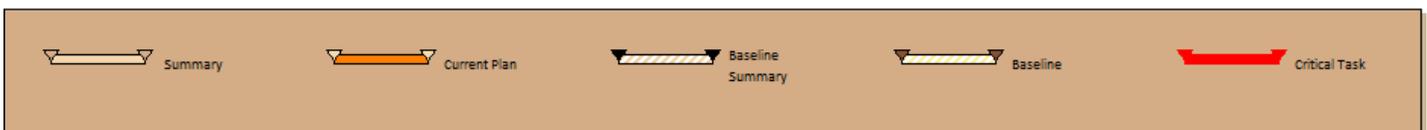
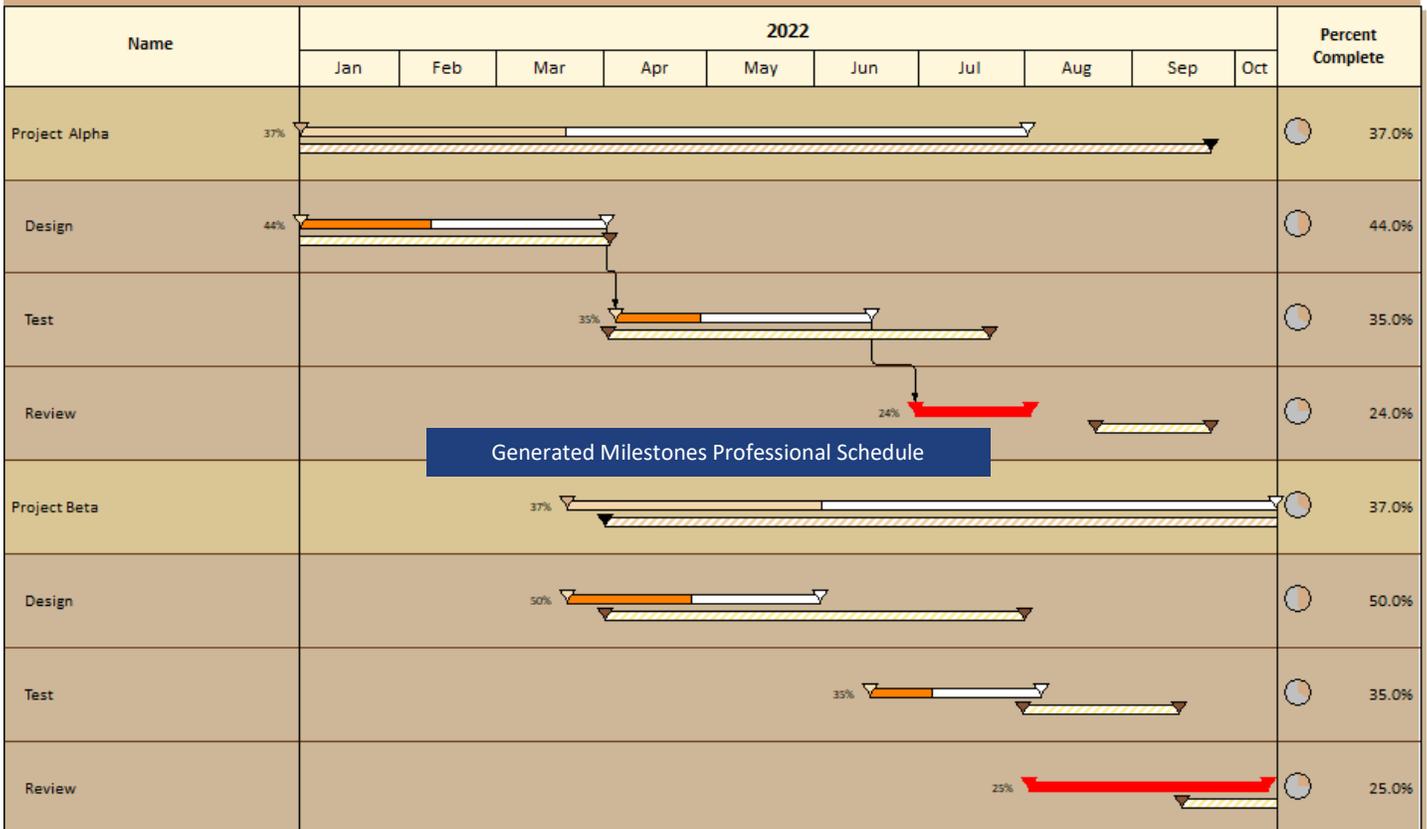
Select this option to have all Microsoft Project tasks marked as critical color red in the generated Milestone file.

5. 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.

6. 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, so keep it opened.



Alpha & Beta Projects Review Schedule



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

The changed Microsoft Project file

The following changes were made to the MS Project File.mpp and renamed MS Project File Changed.mpp

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%**.
- 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%**.

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

- **Project Beta % Complete** changed from 37% to **28%**.
- The Overall Project Task **% Complete** changed from 37% to **32%**.

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

1. Go back to Milestones Professional, **Alpha & Beta Projects.mlj** schedule. It should still be opened. If not open it.

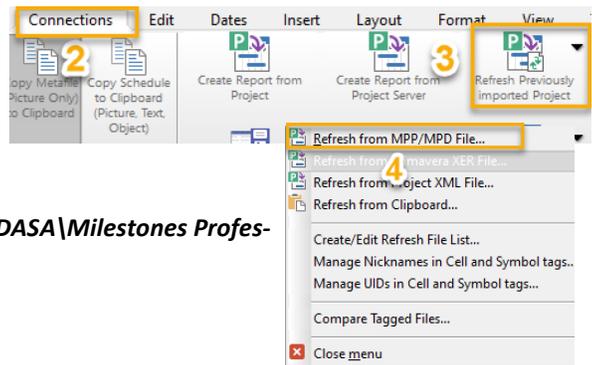
2. Choose the **Connections** tab.

3. In the **Microsoft Project** section choose **Refresh Previously imported Project**.

4. From the drop down choose **Refresh from MPP/MPD File...**. The **Select the file to refresh** dialog box displays.

5. Select **MS Project File Changed.mpp** by navigating to the **Program Files\KIDASA\Milestones Professional 2021\Samples\Lessons folder**. Choose **Open**.

6. The MS Project format XML Refresh Options dialog displays.



The MS Project format XML Refresh Options

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 some percent complete values in the Microsoft Project file changed, thus the percent complete 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 the fill to status of the symbols and horizontal bars update.

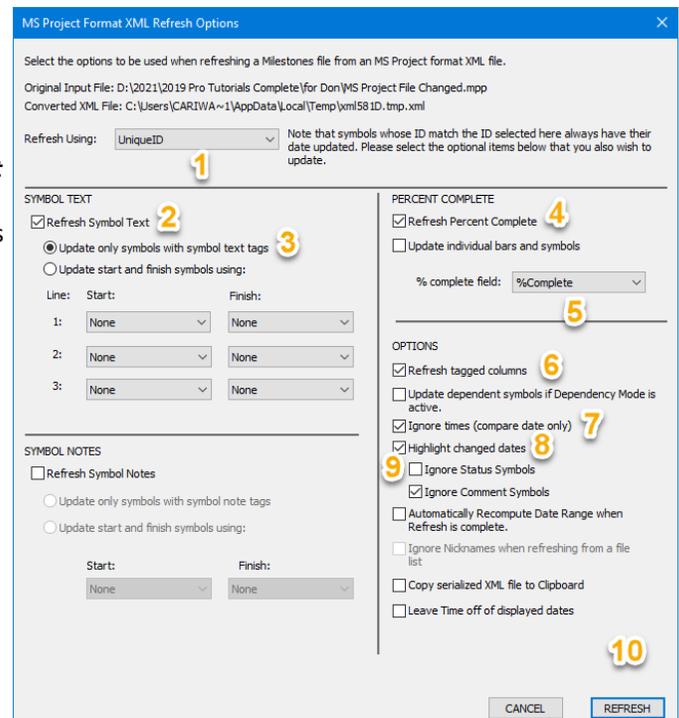
6. Under **Options** check on **Refresh tagged columns**. To have the information in the Percent Complete column update based on the changes in the Microsoft Project file.

7. Under **Options** check on **Ignore times**. Only the date of a task will be considered when the file is updated.

8. Under **Options** check on **Highlight Changed Dates**. To have any Baseline and Normal symbols that update highlight in orange.

9. Uncheck to **Ignore Status Symbols**. To have any status symbols (control percent complete) highlight in orange when the percent complete of a task changes.

10. Choose **Refresh**. The schedule will be generated.



See the next page to view the Refreshed Milestones schedule reflecting the changes made to the finish dates which impacted percent complete thus status symbols, the percent complete column, and the percent complete value as symbol text.

As selected in the Refresh dialog box, highlighted in orange are the finish dates that were changed in the Microsoft Project file. Because the finish dates were changed the percent complete also changed thus forcing the status symbols to move and they are also highlighted in orange.

Note: The percent values as symbol text updated and some Percent Complete column values have changed, these we have highlighted with a green box.

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.

