

# Milestones PROFESSIONAL<sup>®</sup> TUTORIALS

## Lesson 8 - Symbol HyperLinks and Symbol Links

### In this lesson you will learn how to:

- Add, activate, remove a symbol Hyperlink to a file or URL
- Add, activate, remove a task row Hyperlink to a file or URL
- Add a symbol link between schedules.

If you manage multiple schedules, you will find Milestones Professional's Hyperlinks feature very valuable. A Hyperlink is a link from any symbol, task row, picture and Freeform text on the schedule to any other schedule, document, or web page. In addition to Hyperlinks, Milestones supports "symbol links." With symbol links a symbol's date on one schedule can be based on a symbol's date on another schedule. (Symbol links can also be used to link symbols within a single schedule.)

### Open the schedule for this lesson

This lesson will show you how to maintain a "hub" schedule that links to most aspects of a project's world.

1. On the toolbar, choose **File**.
2. In the **Files and Templates: Open and Save Options** section select **Open Samples or Lessons**. The **Open a Sample Chart** dialog displays.
3. Under **Select a Folder below to Open**, select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 08 Starter Schedule.mlj**.
5. Save the schedule to an accessible folder on your computer. Choose the **File** tab. In the **Files and Templates: Open and Save Options** section, choose **Save As...** In the menu that displays choose **Chart**. Name, then save the schedule.

### Master Schedule

Completion Dates for all Projects

Department	2020		
	January	February	March
Marketing	Web Project ★ 1/11	Brochures ★ 2/11	Interactive CD ★ 3/11
Sales	★ 1/11	★ 2/10	★ 3/7
Information Systems	Spreadsheet ★ 1/17	Upgrades ★ 2/12	Software Purchases ★ 3/13
Research & Development	Beta Software Test ★ 1/14	Bug Fixes ★ 2/8	Beta Survey ★ 3/10
	★ Low Priority	★ Medium Priority	★ Critical Priority

6. Follow the instructions above to open and save **Lesson 08 Web Site Project.mlj**, for use later in the tutorial.
7. For this tutorial to work back and forth between the schedules go to **View | Window Controls | Switch Window**.

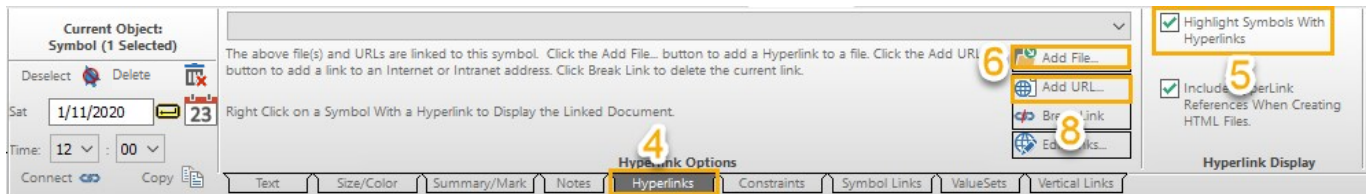
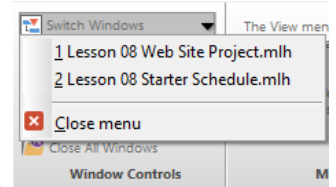
### Web Site Project

Task	2019	2020	Duration
	December	January	
Design Page	12/9	12/16	8d
Create Animated Gifs	12/16	12/31	14d
Publish Product Specs.			11d
Implement Changes		1/8	13d
Targeted Completion		1/24	1d

## Symbol Hyperlink

### Add a symbol Hyperlink to open another file or URL

1. Choose the **View** tab. In the **Window Controls** section, choose **Switch Windows** then choose the **Lesson 08 Starter Schedule.mlh** to make it the active schedule.
2. Click the (↶) **Arrow** tool in the toolbox.
3. In the **Marketing** task row click the **Web Project red star symbol**. The toolbar will change to the **Selection** tab with **Current Object: Symbol** making it active for the symbol.



4. At the bottom of the toolbar choose the **Hyperlinks** tab.
5. In the **Hyperlink Display** section check on **Highlight Symbols With Hyperlinks**.
6. Click the **Add File...** **Add File** button. The **Select the Document File to Link** dialog box displays.
7. Locate your saved **Lesson 08 Web Site Project.mlh** and select it, then choose **Open**. The file path is now in the **Hyperlinks** drop down list and the **Web Project** symbol is highlighted with a **Hyperlink** icon.
8. Now click the **Add URL...** **Add URL** button. This displays the **Add Internet or Intranet URL** dialog box.
9. Type in **http://www.kidasa.com** and press **OK**. The URL is now in the **Hyperlinks** drop down list.



### Activate a file or URL which has been Hyperlinked to a symbol

1. The **Lesson 08 Starter Schedule.mlj** should still be the active schedule. (If not, use **View | Window Controls | Switch Windows**.)
2. Click the (↶) **Arrow** tool in the toolbox.
3. Right-click on the **Web Project** symbol with the **Hyperlink** icon. This brings up the right-click menu.
4. In the **All Hyperlinks Dialog** section, choose **Hyperlink: Lesson 08 Web Site Project** to launch the **Lesson 08 Web Site Project** schedule.
5. Right click the **Web Project** symbol again. In the **All Hyperlinks Dialog** section and choose **Hyperlink: http://www.kidasa.com** to launch the **KIDASA Software, Inc's** web site.

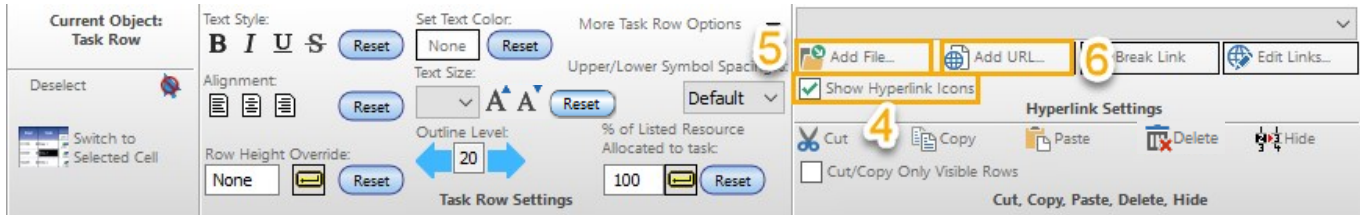
### Remove Hyperlinks from a symbol

1. Choose the **View** tab. In the **Window Controls** section, choose **Switch Windows**. Then choose the **Lesson 08 Starter Schedule** to make it the active schedule.
2. In the **Marketing** task row click the **Web Project symbol**. The toolbar will change to the **Selection** tab with **Current Object: Symbol**.
3. At the bottom of the toolbar choose the **Hyperlinks** tab.
4. In the **Hyperlinks Option** section select the **Lesson 08 Starter Schedule.mlj** from the drop down list.
5. Click the **Break Link** button to remove the link. Now **Lesson 08 Starter Schedule.mlj** path is no longer shown in the drop down.
6. Now Remove the **http://www.kidasa.com** hyperlink by selecting it.
7. Click the **Break Link** button to remove the link. Now **http://www.kidasa.com** path is no longer shown in the drop down and the **Web Project** symbol does not have the **Hyperlink** icon any longer.

## Hyperlink a file or URL to a task row

### Add a Task Row Hyperlink to open another file or URL

1. The **Lesson 08 Starter Schedule.mlh** should still be the active schedule. (If not, use **View | Window Controls | Switch Windows** .)
2. Click the (↶) **Arrow** tool in the toolbox.
3. Click the word **Marketing** In the Department column. The task row will highlight. The toolbar will change to the **Selection** tab with **Current Object: Task Row**.



4. In the **Hyperlink Settings** section, check on **Show Hyperlink Icons**.
5. In the **Hyperlink Settings** section, choose the **Add File...** **Add File** button to see the **Select the Document File to Link** dialog box.
6. Locate where you saved **Lesson 08 Web Site Project.mlj** and select it. The file path is now in the drop down list and the **Hyperlink** icon is now displayed in the task row.
7. Choose the **Add URL...** **Add URL** button. This brings up the **Add Internet or Intranet URL** dialog box.
8. Type in **http://www.kidasa.com** and press **OK**. The URL will now show up the **Hyperlinks** list.

### Activate a schedule or URL that has been Hyperlinked to a task row

1. The **Lesson 08 Starter Schedule.mlj** should still be the active schedule. (If not, use **View | Window Controls | Switch Windows** .)
2. Click the (↶) **Arrow** tool in the toolbox.
3. Click the **Hyperlink** icon in the **Marketing** task row. The **Select Hyperlink to Launch** dialog box displays, showing all Hyperlinks.
4. Choose **Lesson 08 Web Site Project's** file path to open **Lesson 08 Web Site Project** schedule or **http://www.kidasa.com** to open **KIDASA Software, Inc's** website. Click **OK** to launch selected Hyperlink.

### Remove a Hyperlink from a task row

1. Choose the **View** tab. In the **Window Controls** section, choose **Switch Windows**. Then choose the **Lesson 08 Starter Schedule** to make it the active schedule.
2. Click the (↶) **Arrow** tool in the toolbox.
3. Click the word **Marketing**. The task row will highlight. The toolbar changes to the **Selection** tab with **Current Object: Task Row**.
4. In the **Hyperlink Settings** section choose the down arrow to show list of hyperlinks for the task row. Select the **Hyperlink** to remove.
5. Click the **Break Link** button to remove the selected Hyperlink.
6. When all links are removed the **Hyperlink** icon will no longer appear in the task row.

Freeform Text and Pictures can have a single URL or File Hyperlink.

Add the Hyperlink by selecting either the Freeform Text or the Picture. The toolbar is now active for the object selected. In the toolbar, in the **Hyperlink** field, type in the URL or File path. Important press the **Update** button.


Right click the Picture to select then launch the Hyperlink.

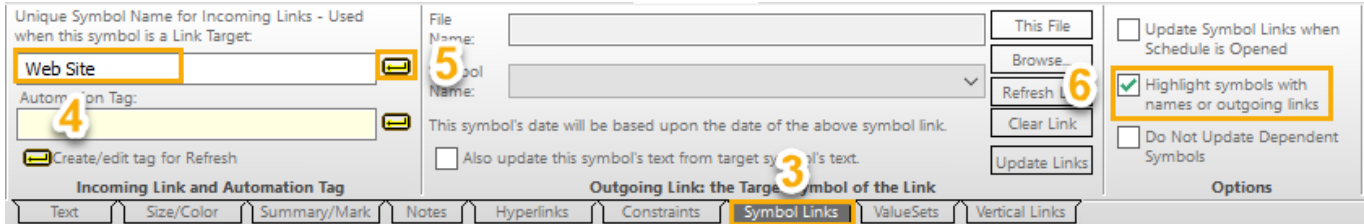
To activate the Freeform text Hyperlink check on **Auto Launch** option (in the toolbar near the Hyperlink field) to have the Hyperlink activate when the Freeform text is clicked.



## Add a symbol link between schedules

### Name the Target Symbol



The date of this target symbol will drive the date of any symbol whose outgoing link points to this target symbol.

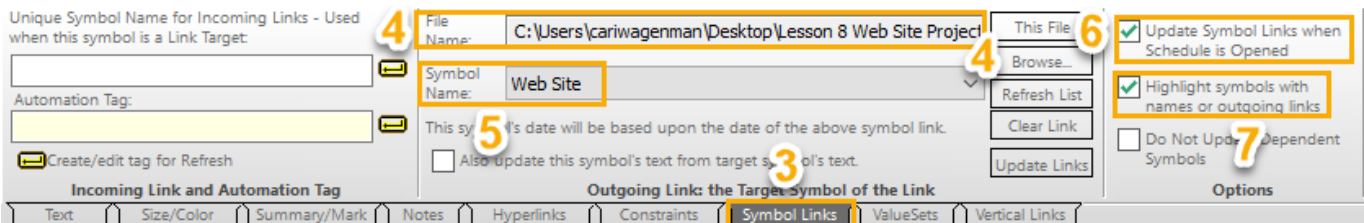
1. Choose the **View** tab. In the **Window Controls** section, choose **Switch Windows** and then choose the **Lesson 08 Web Site Project** to make it the active schedule.
2. In the task row **Targeted Completion** click on the  **red checkmark dated 1/24**.
3. The toolbar changes to the **Selection** tab with **Current Object: Symbol** making it active for the symbol. At the bottom of the toolbar choose the **Symbol Links** tab.




4. In the **Incoming Links and Automation Tag** section under **Unique Symbol Name for Incoming Links-Used when this symbol is a Link Target** (white blank space), type in **Web Site** to name the symbol link.
5. Press the  **Apply** button.
6. In the **Options** section check on **Highlight symbols with names or outgoing links**. This attaches an icon to all symbols involved in symbol linking.  **1/24**
7. Save **Lesson 08 Web Site Project**. (Important!)

### Establish the link

1. Choose the **View** tab. In the **Window Controls** section, choose **Switch Windows** then choose the **Lesson 08 Starter Schedule** to make it the active schedule.
2. In the **Marketing** task row, click the **Web Project on 1/11/**  **1/11** symbol. 
3. The toolbar will change to the **Selection** tab with **Current Object: Symbol** making it active for the symbol. At the bottom of the toolbar choose the **Symbol Links** tab.



4. In the **Outgoing Link: the Target Symbol of the Link** section, choose the **Browse** button. Browse to where you saved the **Lesson 08 Web Site Project.mlj** and select it. Select **Open**. The file path will now appear in the **File Name** box.
5. The **Symbol Name** box will expand. If it doesn't, click the down arrow and choose **Web Site** (the name given for the target symbol).
6. Check on **Update Symbol Links when Schedule is Opened**. Now, when a schedule with outgoing links is opened, those links are automatically updated with the latest target symbol dates.
7. Check on **Highlight symbols with names or outgoing links**. This attaches an icon to all symbols involved in symbol linking.  **1/11**

If Dependency mode (not turned on in the schedules being used for this tutorial) is turned on all dependent symbols of the linked symbol will also update unless **Do Not Update Dependent Symbols** (in the **Options** section of the toolbar) is selected for that linked symbol.

If the target symbol has symbol text associated with it and the linked symbol should reflect the target symbol's text. Check on **Also update this symbols text from the target symbol's text** in the **Outgoing Link: the Target Symbol of the Link** section for the toolbar.

### Update the link

Now that **Web Project star symbol on 1/11**(outgoing link) in **Lesson 08 Starter Schedule.mlj** file is linked to the **red checkmark symbol on 1/24** (incoming link) in **Lesson 08 Web Site Project.mlj** file, the **Lesson 08 Starter Schedule.mlj** file can be updated. The update will move the **Web Project star symbol on 1/11** to **1/24**(the date of the red checkmark symbol on in Lesson 08 Web Site Project.mlj).

### Master Schedule

Completion Dates for all Projects

Department	2020		
	January	February	March
Marketing	Web Project ★ 1/11	Brochures ★ 2/14	Interactive CD ★ 3/10
Sales	Trade Show ★ 1/11	Client Presentation ★ 2/10	Training ★ 3/6
Information Systems	Spreadsheet ★ 1/17	Upgrades ★ 2/12	Software Purchases ★ 3/12
Research & Development	Beta Software Test ★ 1/14	Bug Fixes ★ 2/8	Beta Survey ★ 3/9
★ Low Priority    ★ Medium Priority    ★ Critical Priority			

### Web Site Project

Task	2019	2020	Duration
	December	January	
Design Page	12/9	12/16	8d
Create Animated Gifs	12/18	12/31	14d
Product Specs.	12/27	1/6	11d
Implement Changes	1/8	1/20	13d
Targeted Completion		1/24	1d
▲ Start    ■ Progress    ▼ End			

Linked

1. Choose the **View** tab. In the **Window Controls** section, choose the ▼ down arrow next to **Switch Windows** and choose the **Lesson 08 Starter Schedule** to make it the active schedule.
2. Choose the **File** tab.
3. In the **Master/Update** section choose **Update Master Schedule, Linked Symbols**.
4. Choose **Linked Symbols**.
5. The **Symbol Links Update Results** dialog box appears.

In the **Symbol Links Update Results** dialog box all successfully updated symbols will have an **Updated Successfully** notation next to the target name.

6. Press **Ok** to close the box. Now in **Lesson 08 Starter Schedule.mlj**, **Web Project star symbol** has been updated to **1/24**.

### Master Schedule

Completion Dates for all Projects

Department	2020		
	January	February	March
Marketing	Web Project ★ 1/24	Brochures ★ 2/14	Interactive CD ★ 3/10
Sales	★ 1/11	Client Presentation ★ 2/10	Training ★ 3/6
Information Systems	Spreadsheet ★ 1/17	Upgrades ★ 2/12	Software Purchases ★ 3/12
Research & Development	Beta Software Test ★ 1/14	Bug Fixes ★ 2/8	Beta Survey ★ 3/9
★ Low Priority    ★ Medium Priority    ★ Critical Priority			