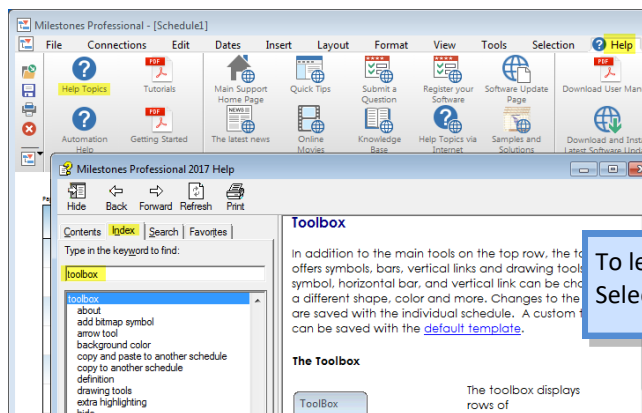
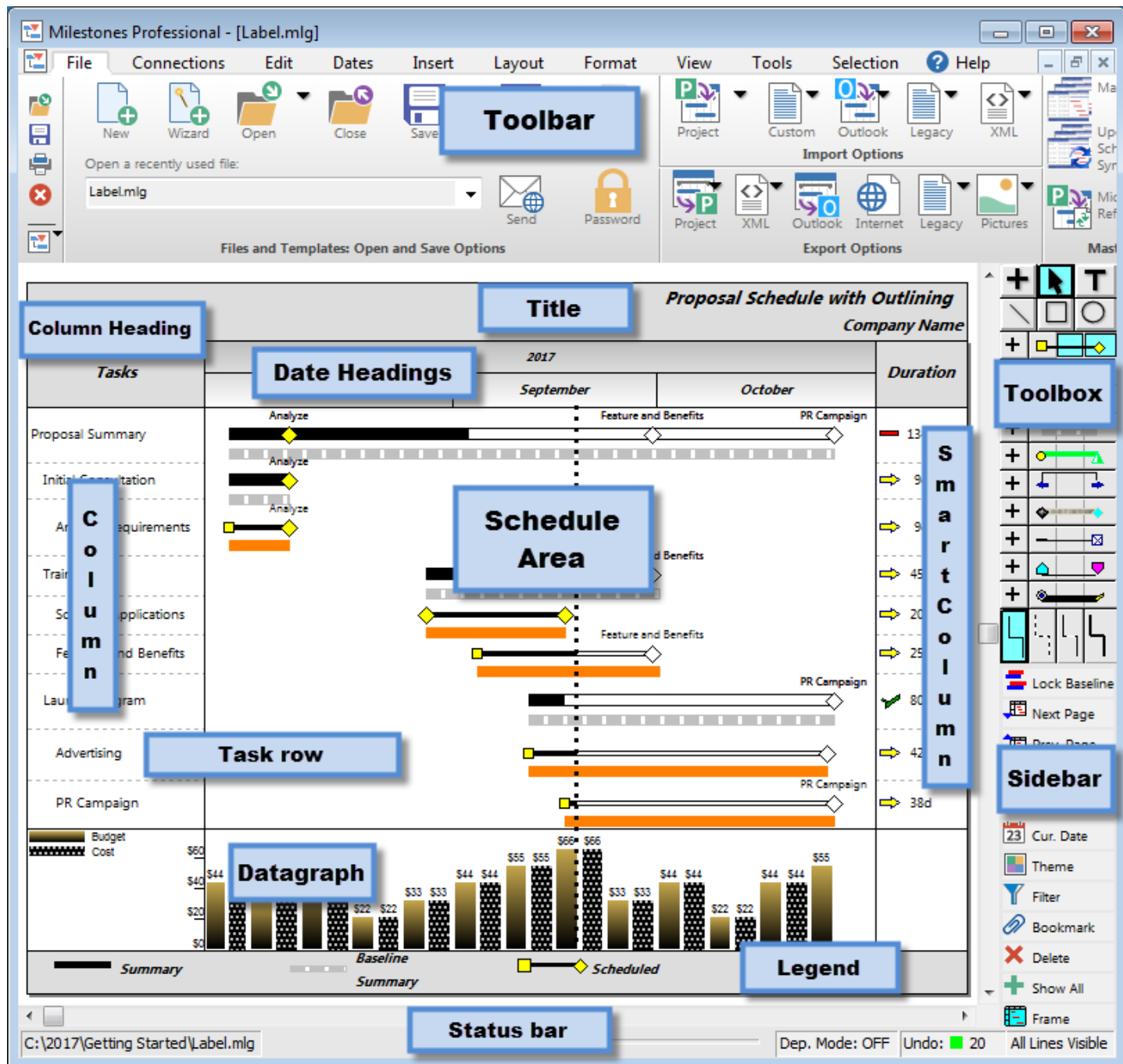


# Getting Started: Exploring Your Workspace





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

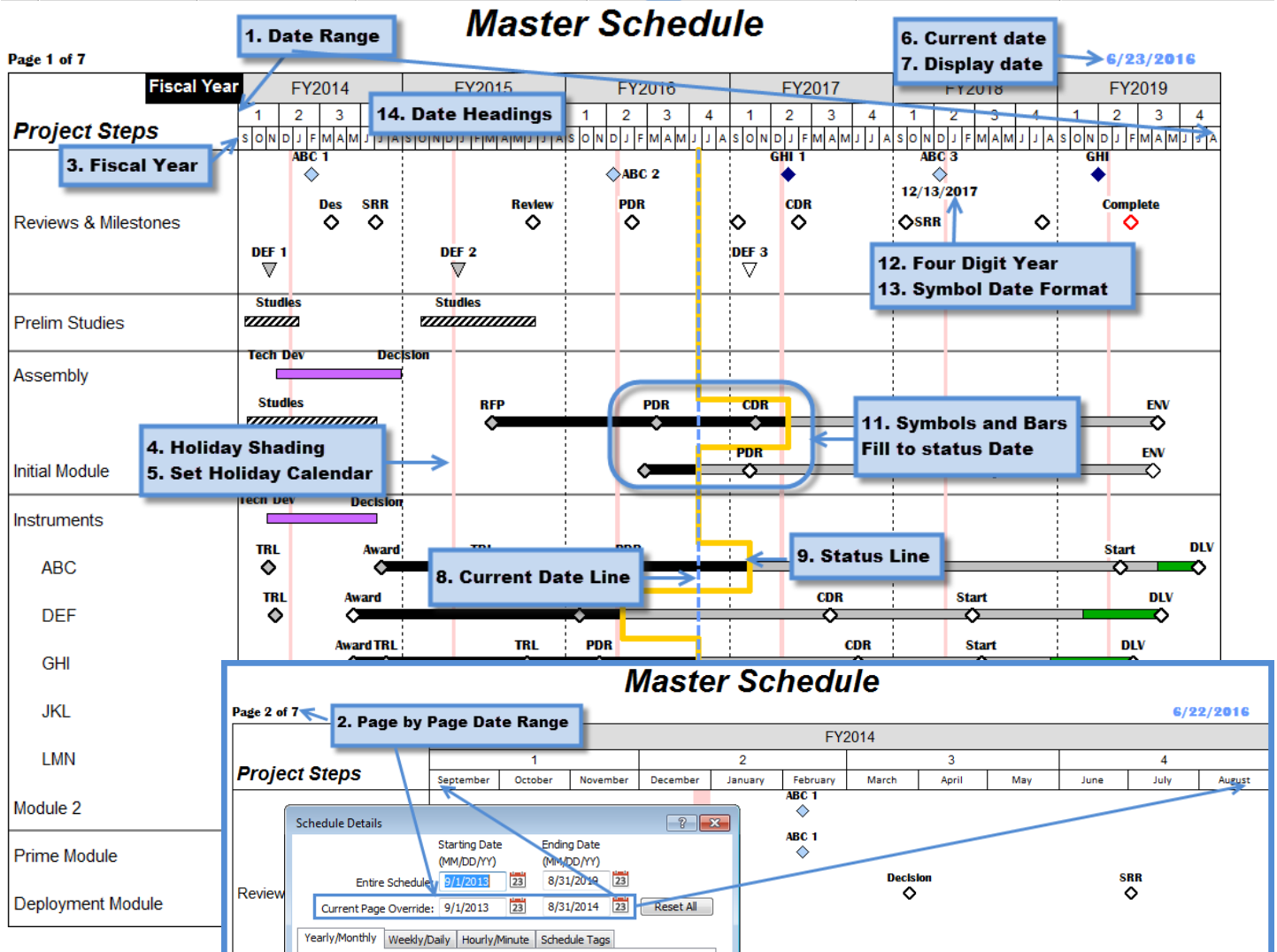
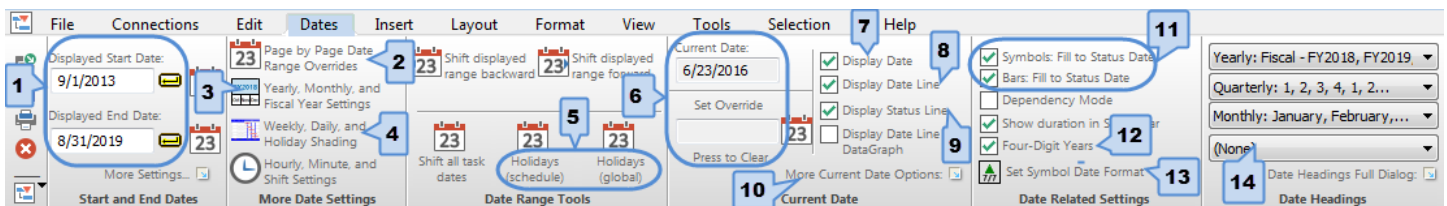
# Getting Started: Formatting Your Schedule

## CHOOSE THE **DATES** TAB TO:

1. Set the schedule's **Date Range**.
2. Set **Page by Page Date Range**.
3. Set options for **Fiscal Year**.
4. Set Saturday, Sunday and **Holiday Shading**.
5. Set the schedule' **Holiday Calendar**.
6. **Current Date** from computer or choose to override.
7. Display the **Current Date**.
8. Display the **Current Date Line**.
9. Display the **Status Line**.
10. Change Date and Status Line attributes - More current date options.
11. Have **Symbols & Bars Fill to Status Date**
12. Choose **Four-Digit Years**.
13. Set the **Symbol Date Format**.
14. Set the schedule's **Date Headings**.

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

Make sure to press the  **APPLY** buttons after entering the parameters for the schedule.



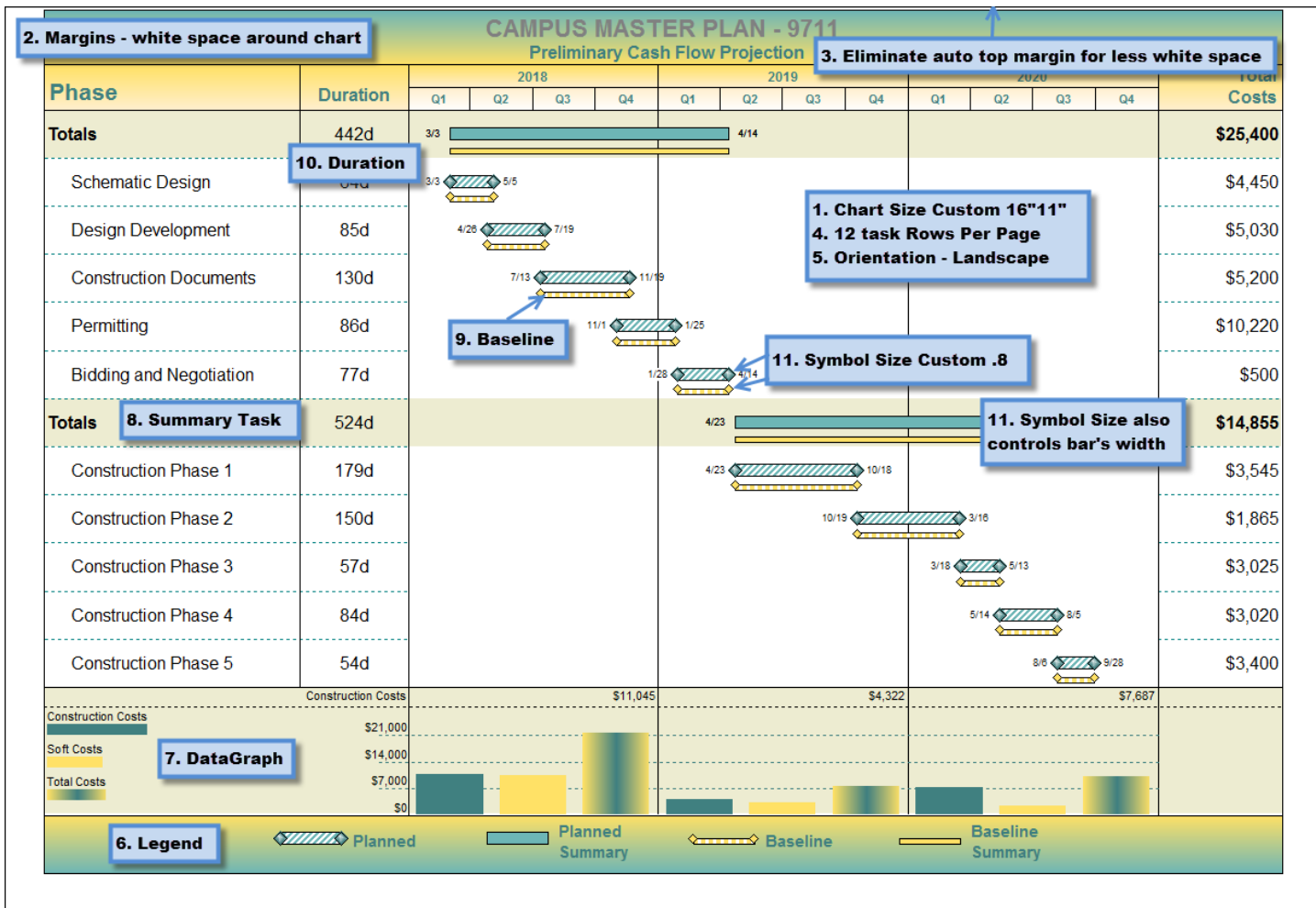
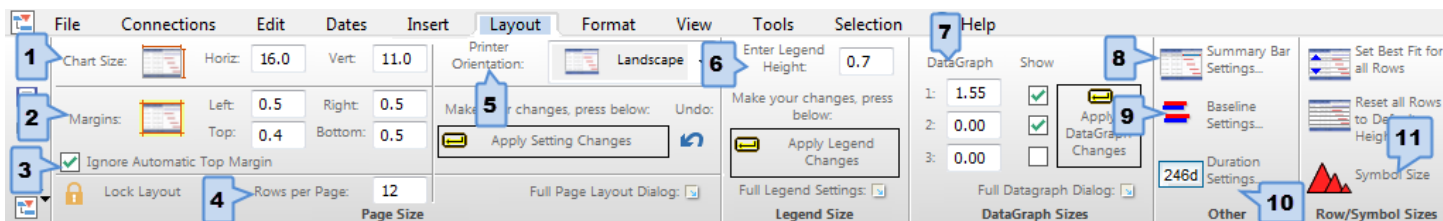
# Getting Started: Formatting Your Schedule continued

CHOOSE THE **LAYOUT** TAB TO:

1. Set the **Chart Size**.
2. Set the **Margins**.
3. Eliminate **Automatic Top Margin**.
4. Set the **Rows Per Page**.
5. Set the **Orientation**.
6. Set the **Legend Height**.
7. Set the three possible **DataGraph** heights.
8. Setup **Summary Bars**.
9. Setup **Baseline**.
10. Set **Duration** options.
11. Global **Symbol Size** change.

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

Make sure to press the **APPLY** buttons after entering the parameters for the schedule.



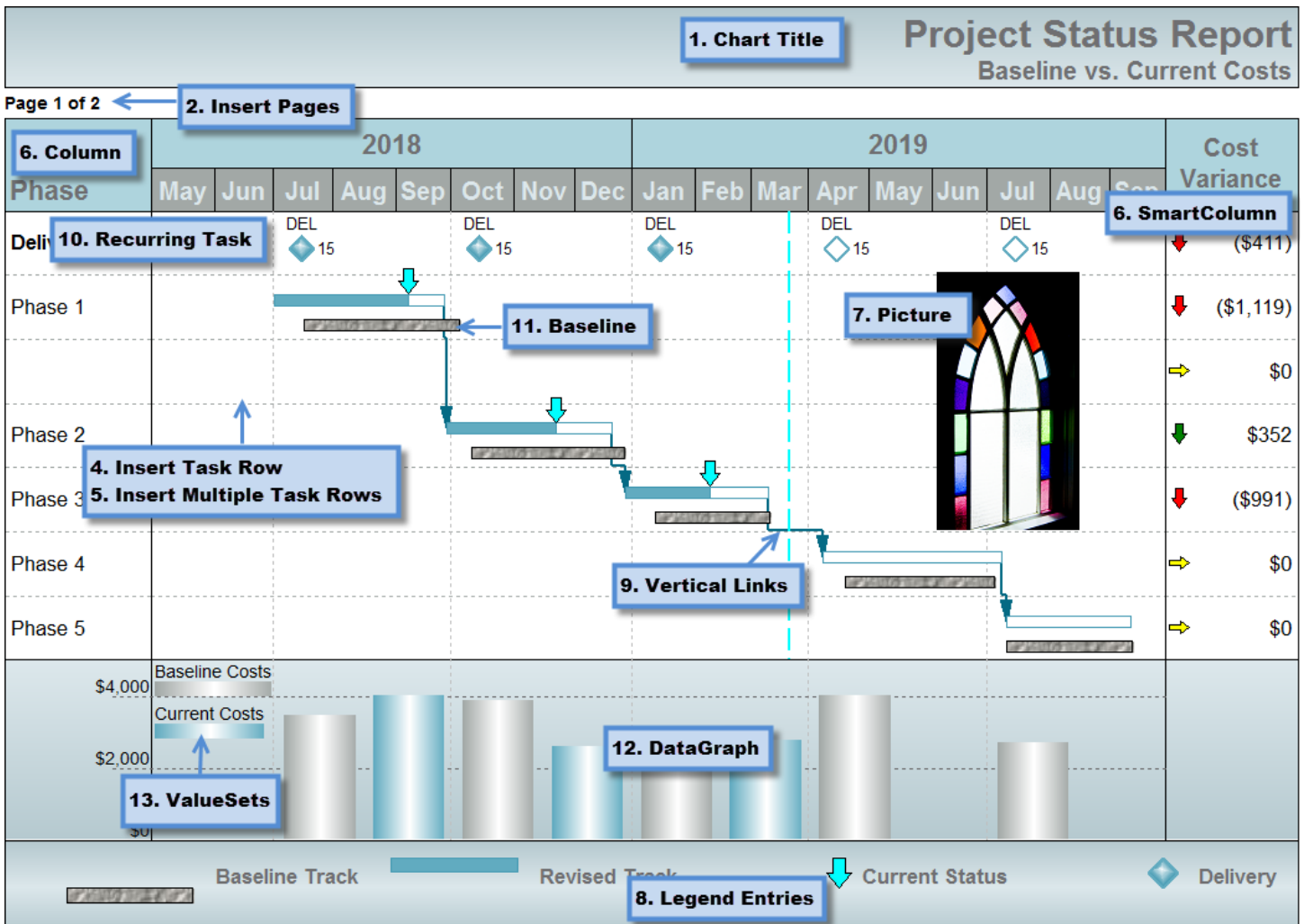
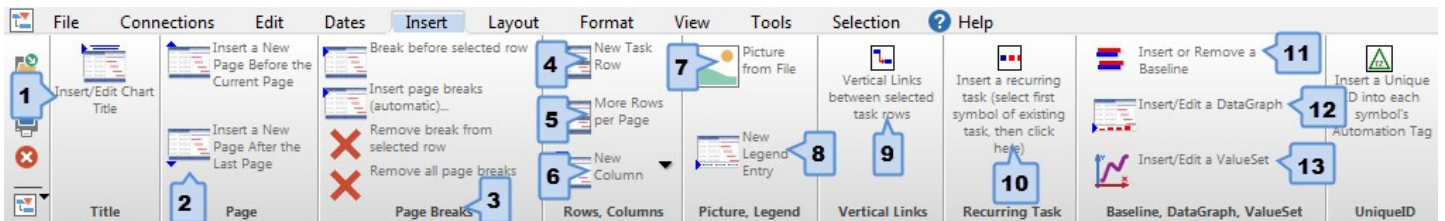
To learn more about the tab features choose: **Help | Help Topics | Milestones Professional Help**  
Select the **Index** tab and type in the feature. For Example **Baseline**.

# Getting Started: Formatting Your Schedule continued

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 multiple **Task Rows**.
6. Insert a **New Column**.
7. Insert a **Picture**.
8. Insert a **Legend Entry**.
9. Insert a **Vertical Links**.
10. Insert a **Recurring Tasks**.
11. Insert a **Baseline**.
12. Insert a **DataGraph**.
13. Insert a **ValueSet**.

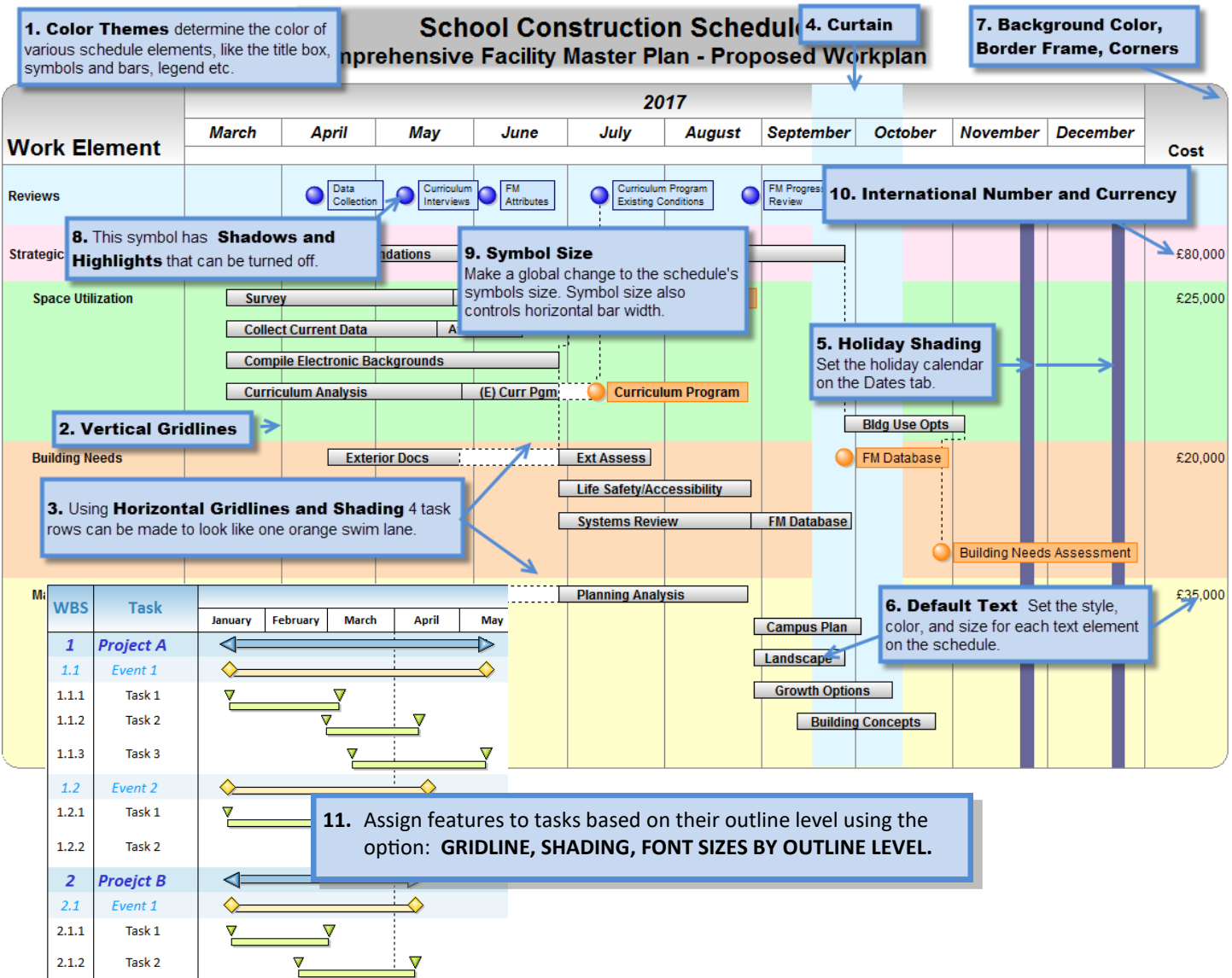
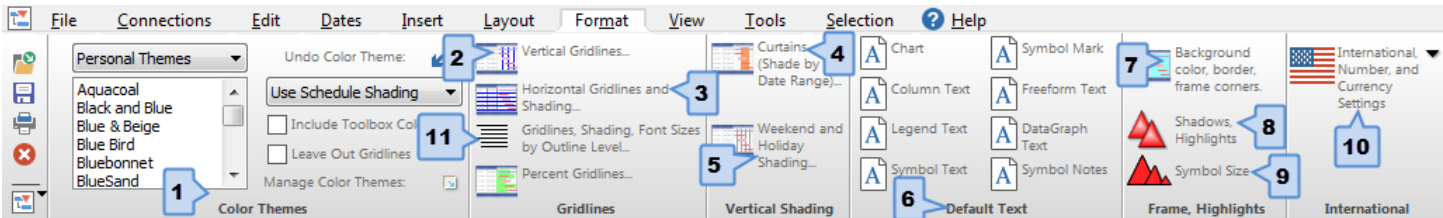
Some of the features on the Insert menu are advanced features you may not use in the first schedules you build. However, knowing the location of these features will help you as you become a Milestones Professional power user.



# Getting Started: Formatting Your Schedule continued

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, Frame Corners**.
8. Clear **Shadows, Highlights**.
9. Change **Symbol Size**.
10. Set **International Number and Currency**.
11. Set-up **Gridlines, Shading, Font Sizes by Outline Level**.





# Getting Started: Understanding Your 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.

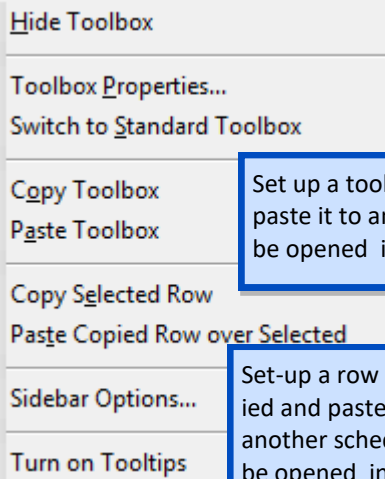
**Drawing Tools** - Use to draw lines, circles or squares.

**Symbol** - select to add to schedule.

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

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

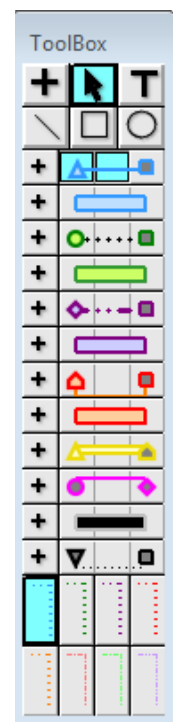
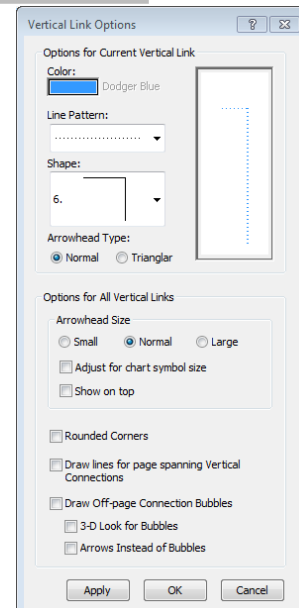
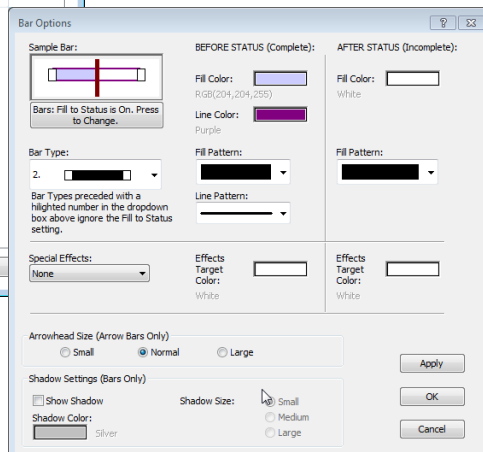
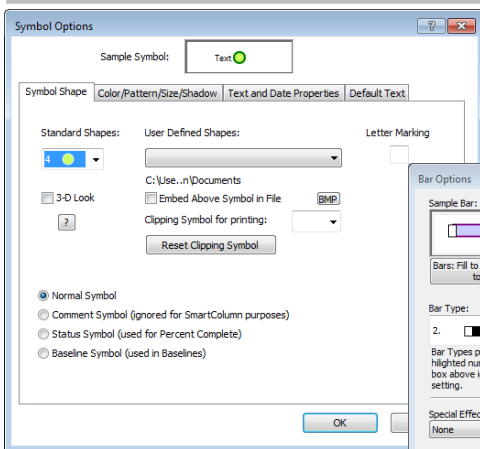
**Vertical Link** - select to add between symbols on different task rows.



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.

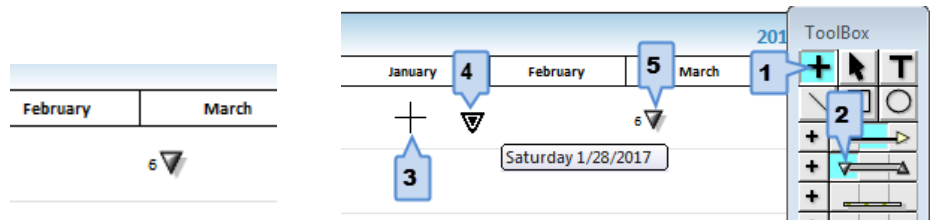
Double click any **Symbol**, **Horizontal Bar** or **Vertical Link** in the toolbox to change its characteristics: (Shape, Type, Size, Color, Markings, Position, Text and Date display).



# Getting Started: Add Information To Your Schedule

## Add a Single Symbol

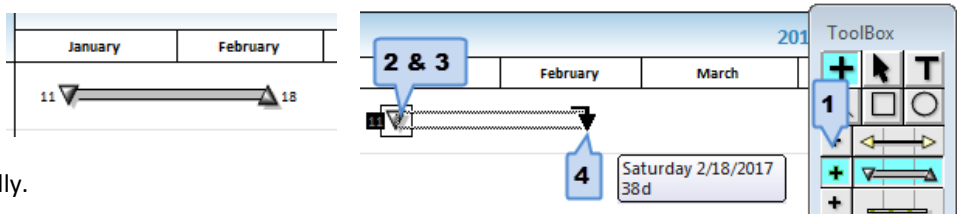
1. In the toolbox, select the **Large Plus** tool.
2. Select a symbol in the toolbox.
3. Move the cursor to the schedule area .
4. Click and drag horizontally.
5. Let go of the mouse button at the selected symbol date.



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**

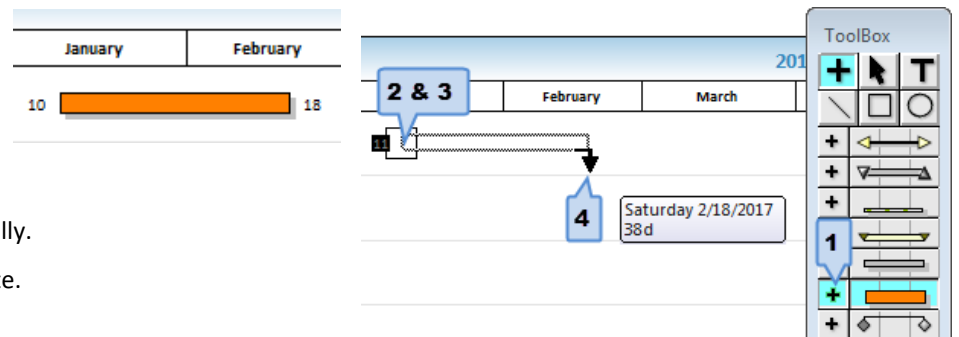
## Add a Horizontal Bar With a Start and End Symbol

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



## Add a Horizontal Bar

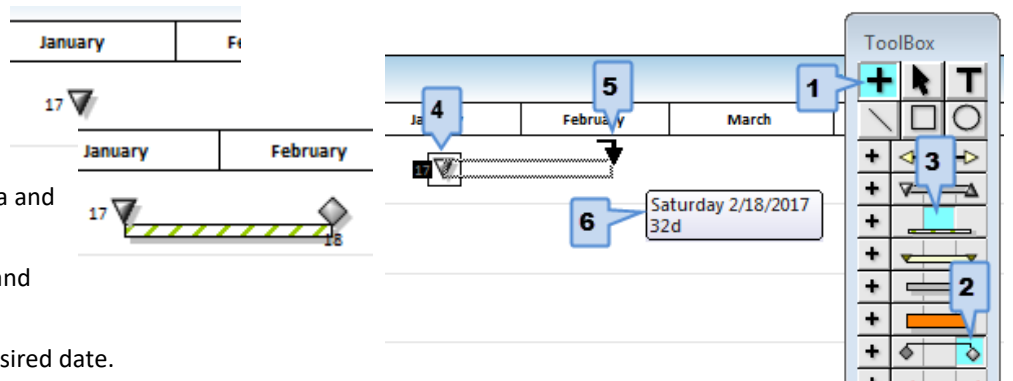
1. In the toolbox, select the **Small Plus** at the beginning of a row with null symbols and a horizontal bar. The entire row in the toolbox will be highlighted in blue.
2. Move the cursor to the schedule area.
3. Click on the start date and drag horizontally.
4. Release the mouse button on the end date.



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

## Add a Bar and Symbol to an Already Existing Symbol in the Schedule

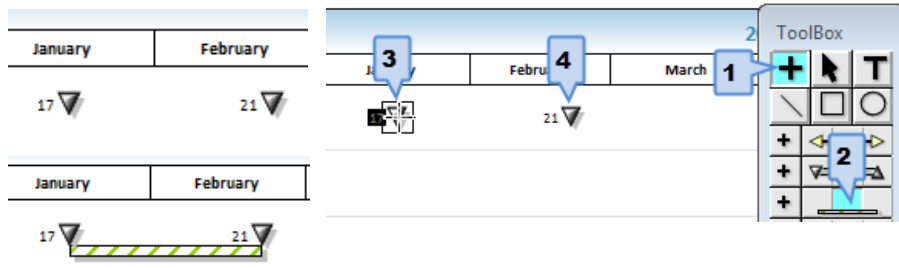
1. In the toolbox, select the **Large Plus** tool.
2. Select a symbol in the toolbox.
3. Select a connector in the toolbox.
4. Move the cursor to the schedule area and click on the already existing symbol.
5. Continue to hold the mouse button and drag horizontally.
6. Let go of the mouse button at the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



# Getting Started: Add Information To Your Schedule

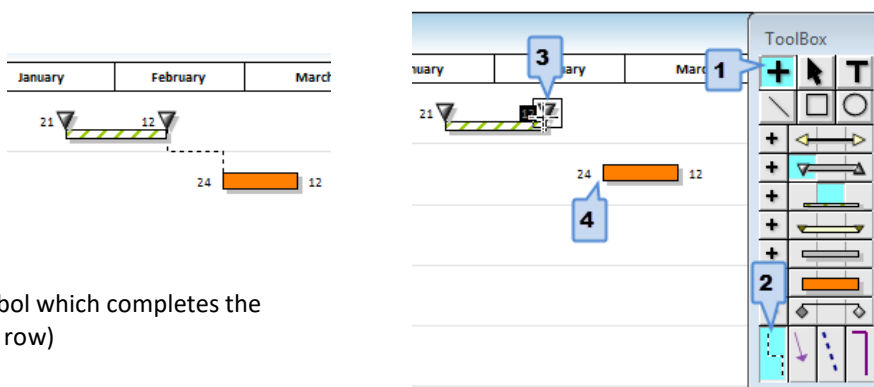
## Add a Horizontal Bar Between Two Symbols Already on the Schedule

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 the **Horizontal Bar** to be used.
4. In the schedule area, click once on the **Symbol** which completes the horizontal link.



## Add a Vertical Link Between Symbols

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 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 row)



## Add Column Text (1)

1. In the toolbox, select the **Text** tool.
2. Click in the column or column heading box 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 COLUMN TEXT

Add FREEFORM TEXT anywhere on the schedule

## Add Freeform Text (3)

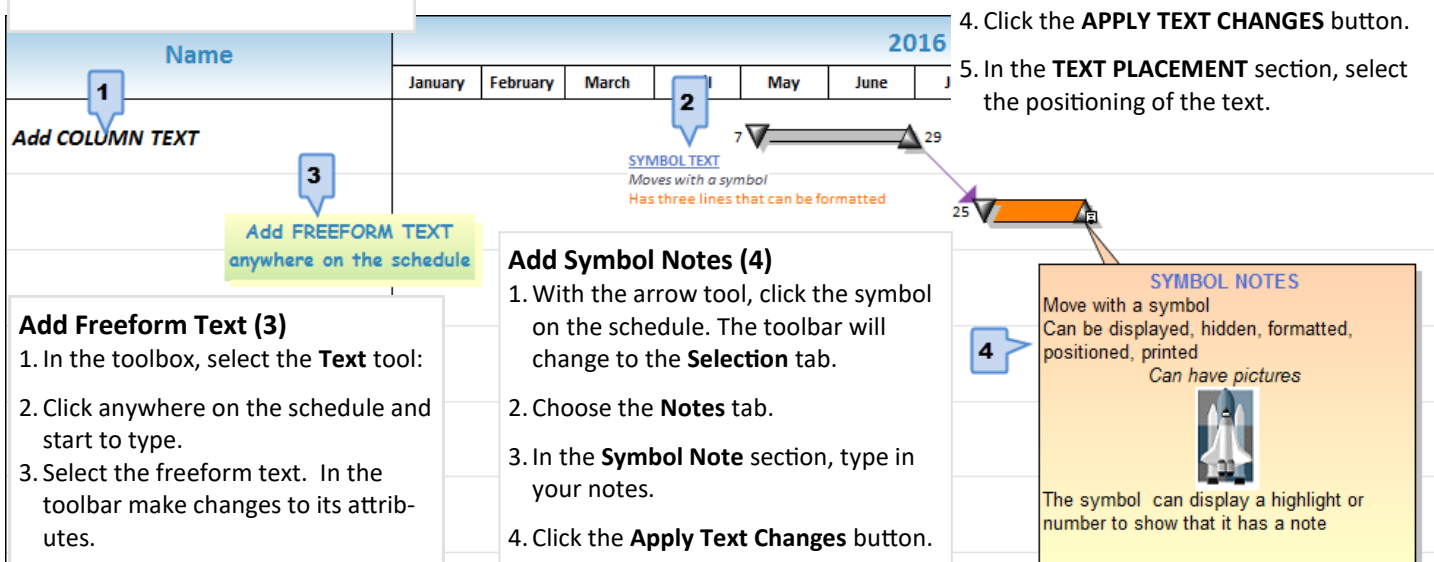
1. In the toolbox, select the **Text** tool:
2. Click anywhere on the schedule and start to type.
3. Select the freeform text. In the toolbar make changes to its attributes.

## 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 the arrow tool to drag the symbol note to a location.



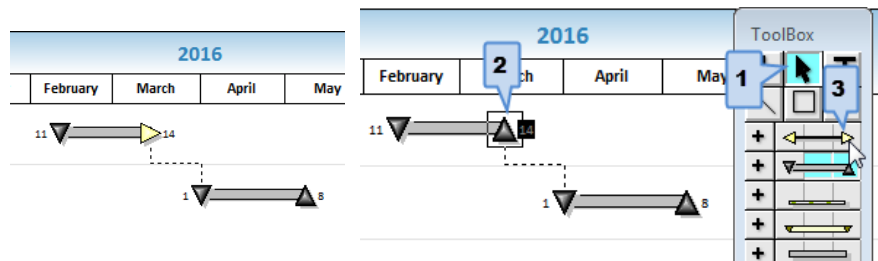


# Getting Started: Change Information On Your Schedule

## Change a Symbol on the Schedule

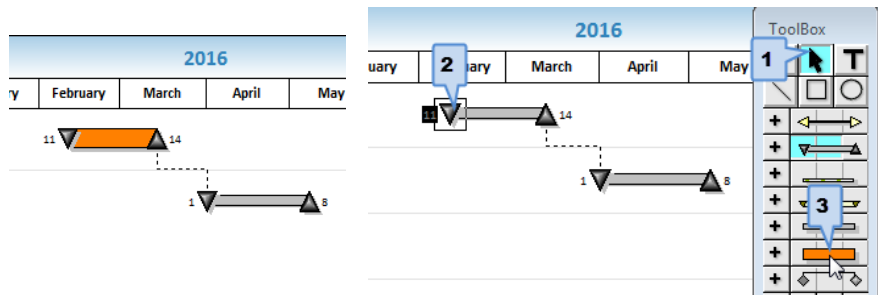
1. In the toolbox, select the **Arrow** tool.
2. In the schedule area, click once on a **Symbol** that you want to change.
3. In the toolbox, click once on a different **Symbol**.

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



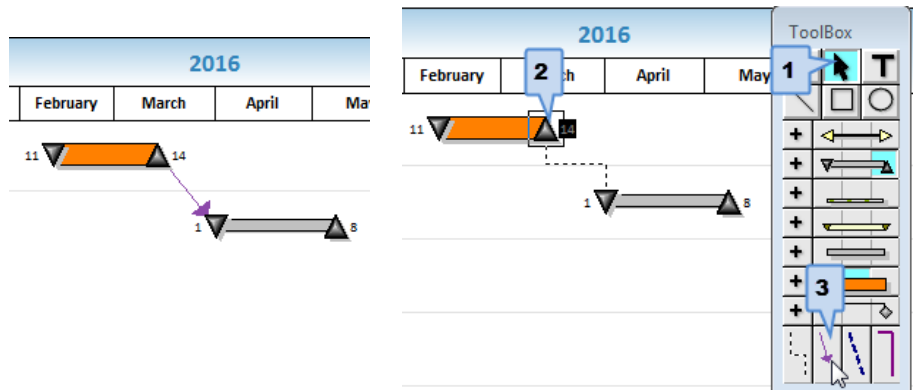
## Change a Bar on the schedule

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



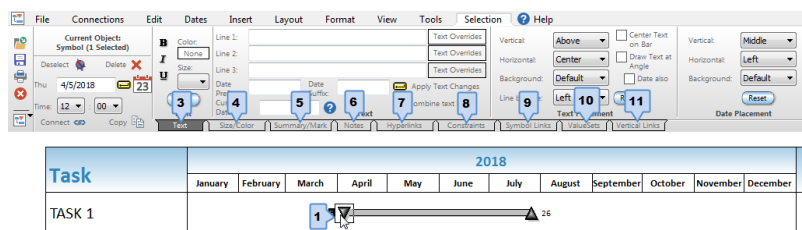
## Change a Vertical Link on the schedule

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



## On the Schedule Change any Individual Symbol's Properties

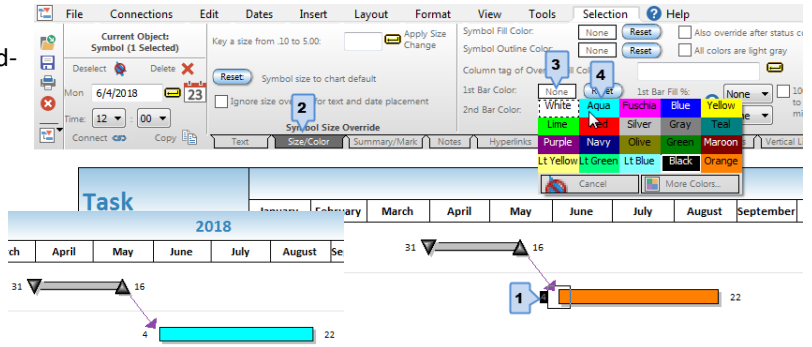
1. Using the arrow tool, in the toolbox select the symbol.
2. The toolbar will change to the **Selection** tab for that symbol select the tabs to change its attributes.
3. Select the **Text** tab to change the text size, color, font, date format and/or the position of the text or date.
4. Select the **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 **Hyperlinks** tab to add URL'S or link files to the symbol.
8. Select **Constraints** tab to add specific actions to the symbol like, lock symbol to this date.
9. Select **Symbol Links** tab to add links between symbols on current schedule, another schedule or a task in a Microsoft Project file.
10. Select the **ValuesSets** tab to add a value to the symbol for Symbol ValueSet Datagraph
11. Select the **Vertical Links** tab to override the vertical links color.



# Getting Started: Change Information On Your Schedule

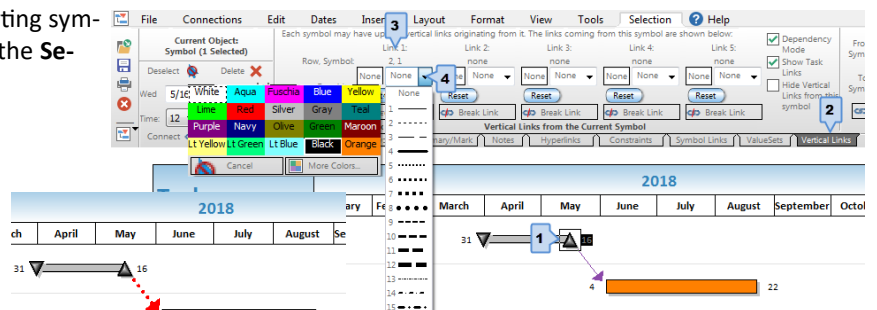
## Override the Color of a Bar on the Schedule

1. Using the arrow tool, in the toolbox 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 pallet.
4. Choose the new color.



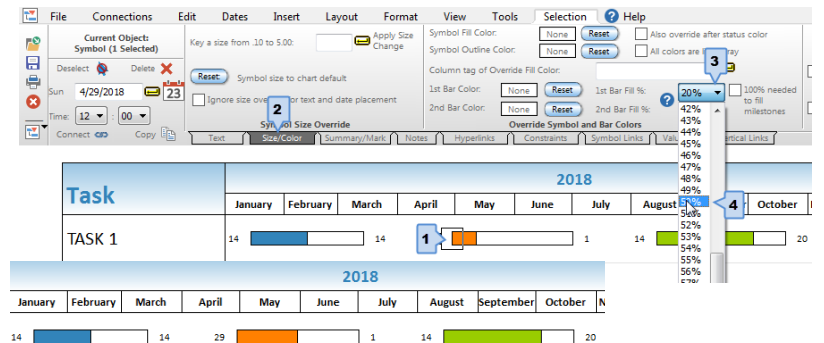
## Override the Color and or Line Type of a Vertical Link on the Schedule

1. Using the arrow tool, in the toolbox 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 find the link to be changed. Each symbol can have up to five vertical links.
4. Choose the new color and/ or line pattern.



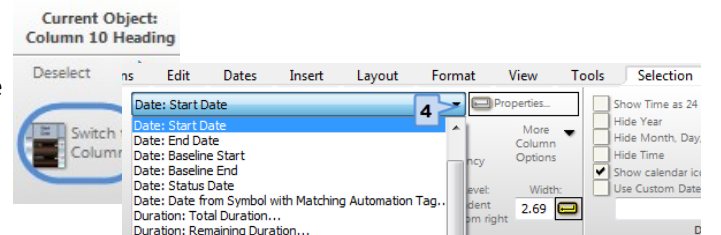
## Override the percent complete of a symbol, bar symbol combination

1. Using the arrow tool, in the toolbox select the starting symbol of the symbol, bar, symbol combination. 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 choose the drop down next to the **1st bar Fill %**.
4. Select a new percent.



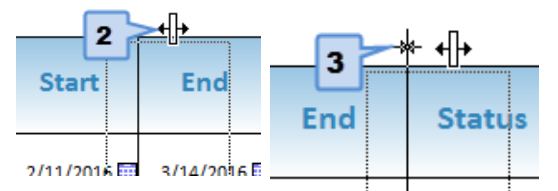
## Change an Existing Column's Type

1. In the toolbox, select the **Arrow** tool.
2. Click the column heading of the column you want to change. The toolbar will changes 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: Change Information On Your Schedule

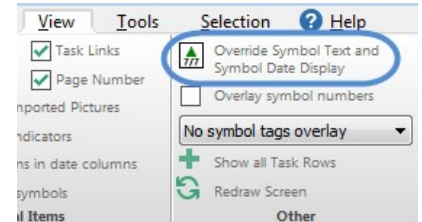


## Shift all Dates by a Number of days

1. On the toolbar, click the **Dates** tab.
2. In the **Date Range Tools** section click the **Shift all task dates** icon.
3. Enter the number of days. Choose **Forward** or **Backward**.

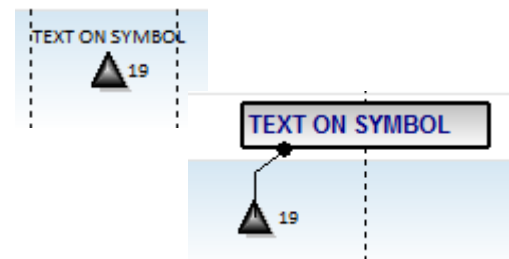
## Hide/Show All Symbol Dates and/or Text

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 symbol notes' default 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: Working With Other Products

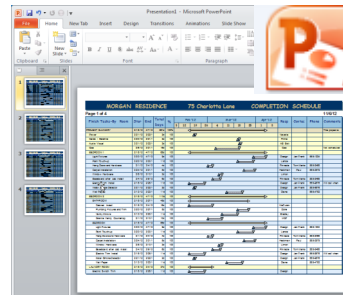
## CHOOSE THE **CONNECTIONS** TAB TO:

### 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*).

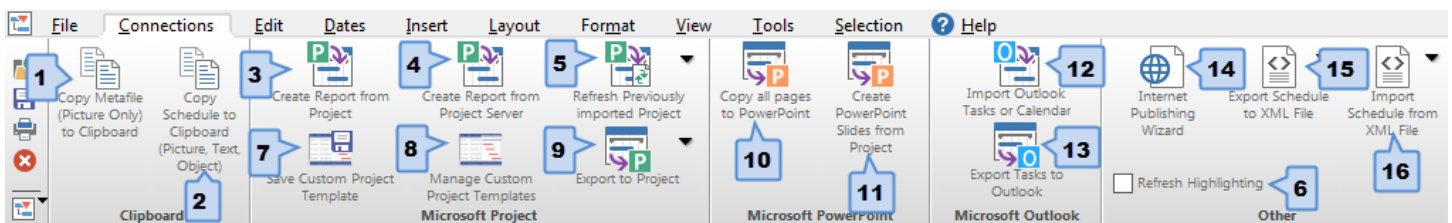
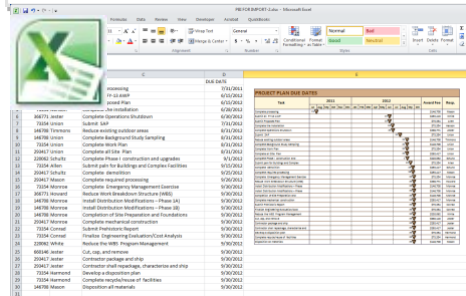


### 10. Copy all Pages to PowerPoint

Picture of multiple page Milestones schedules will be copied into an already existing or new PowerPoint document.

### 11. Copy PowerPoint Slides from Project

The Project to Milestones Wizard will open. The Milestones Professional schedule is generated. It will be copied to PowerPoint.



### 3. Create Report from Project

The Project to Milestones Wizard will open. Step through the wizard. A Milestones Professional schedule will be generated.

### 4. Create Report from Project Server

Open Project Server then choose this option The Project to Milestones Wizard will open. Step through the wizard. A Milestones Professional schedule will be generated.

### 5. Refresh Previously Imported Project

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.

### 6. Refresh Highlighting

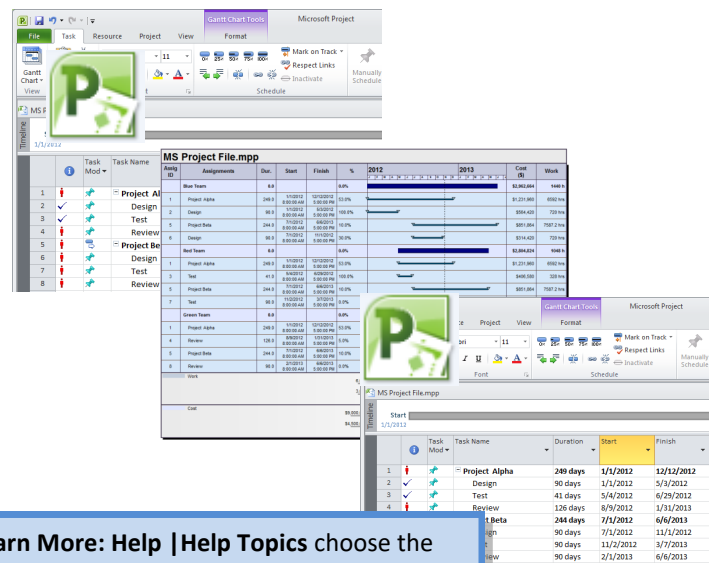
Refreshed schedules can have the change symbols highlighted. Select this option to turn off the highlighting.

### 7. Save Custom Project Template

Choose this option to save a customized Milestones Professional schedule to have it included in the import wizard.

### 8. Manage Custom Project Templates

Choose this option to view and manage all your Custom Project Templates.

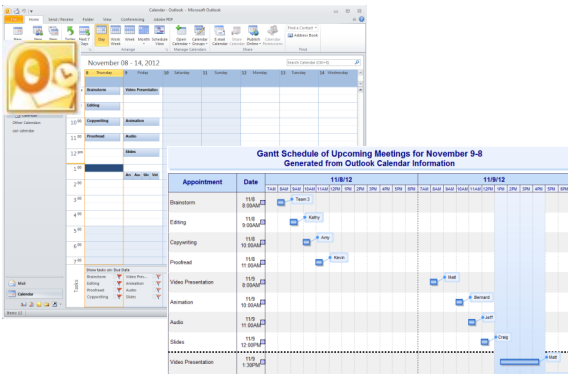


Learn More: [Help | Help Topics](#) choose the **Index** tab type in keyword **Microsoft Project**.

### 9. Export to Project

Choose this option to create a Microsoft Project schedule from a Milestones Professional schedule.

# Getting Started: Working With Other Products continued

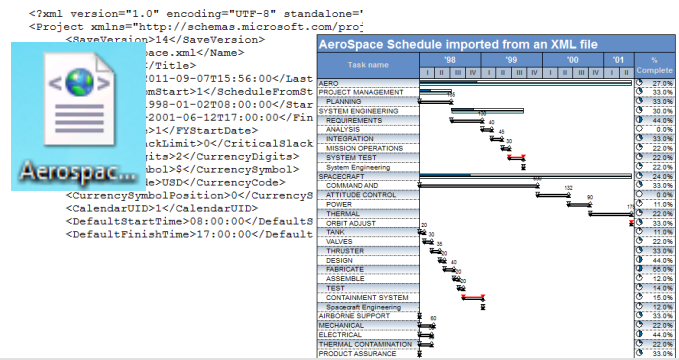


## 12. Import Outlook Tasks or Calendar

The Outlook information is imported into a set Milestones templates which can be modified after the import.

## 13. 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.



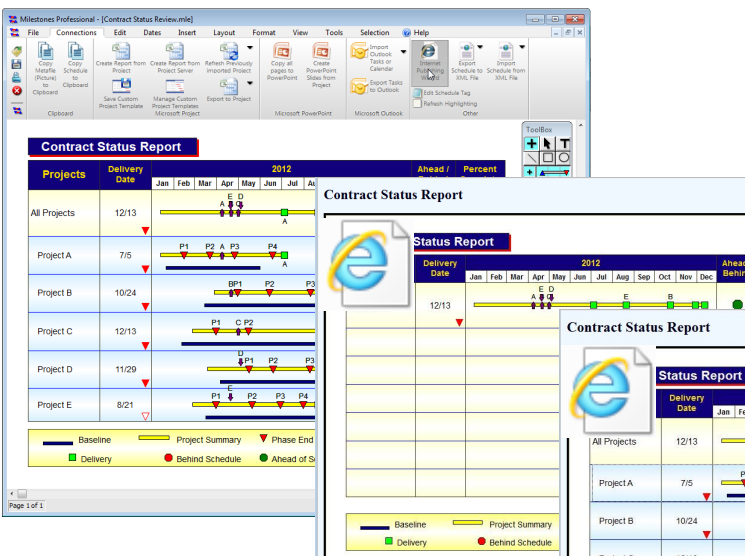
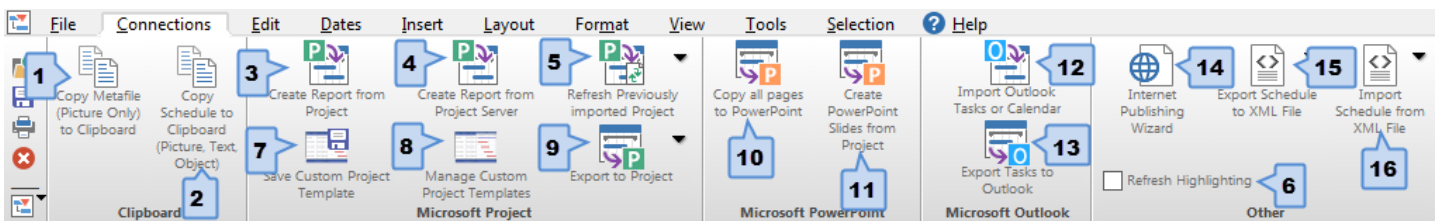
## 15. Export Schedule to XML file

Choose from a variety of export options.

## 16. 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.

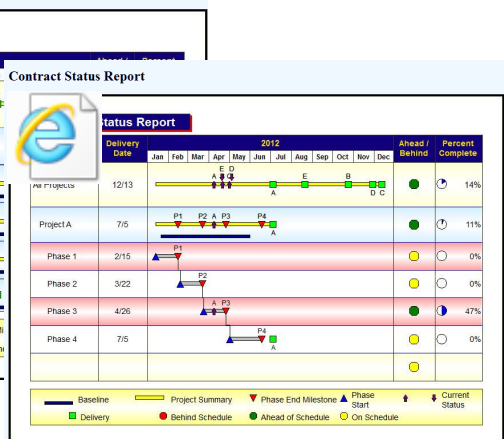


If your schedule is outlined, you can create a set of HTML pages called a "tiered hierarchy" with multiple HTML pages for each outline level.

## 14. Internet Publishing Wizard

Choose to create schedule graphics and HTML pages-ready for your web site.

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



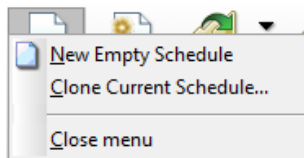


# Getting Started: The File Tab

CHOOSE THE **FILE** TAB TO:

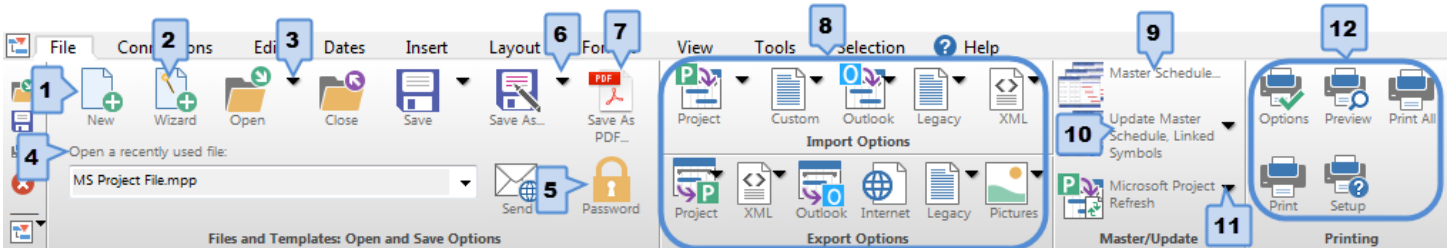
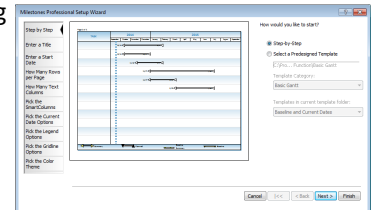
## 1. New

Choose **New Empty Schedule** to open the blank default template.  
Choose **Clone Current Schedule** to create a new schedule from an existing schedule.



## 2. Wizard

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



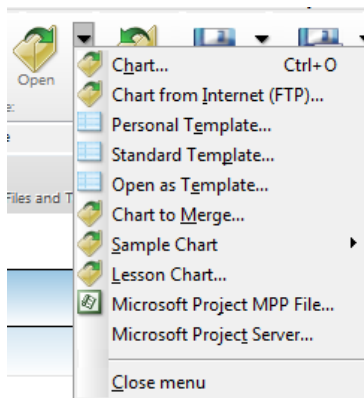
## 3. Open

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.

Chart to Merge open another chart to have it import into the bottom of the current opened schedule, best if chart formats are the same.

Open a **Microsoft Project File** to have the import wizard start-up. Learn more about the Microsoft Project to Milestones Wizard under **Help | Help Topics**.



## 5. Password

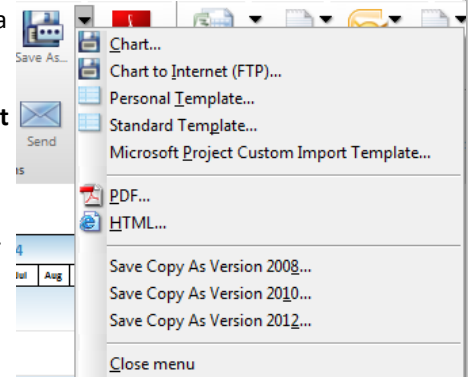
Apply up to a 20 character password to lock a file or to allow the file to be opened as Read-Only without the password.

## 6. Save As

Choose to save as a **Chart**, **Template**, or **Microsoft Project Custom Import Template** (Schedule must have originated from the **Microsoft Project to Milestones Wizard** Learn more about the wizard under the **Help | Help Topics**).

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

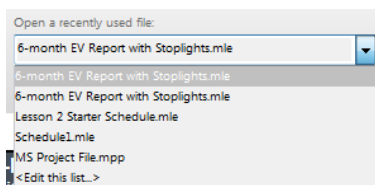
Save as **HTML** to have the **Internet Publishing Wizard** start-up. Learn more about the wizard under **Help | Help Topics**.



## 4. Open a Recently Used File

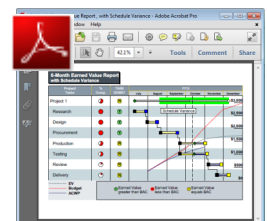
Choose from the list of previously used files. You can choose to edit the list by selecting **Edit this list**.

This is the list that appears in the Milestones Professional Startup Choices dialog box.



## 7. Save As PDF

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

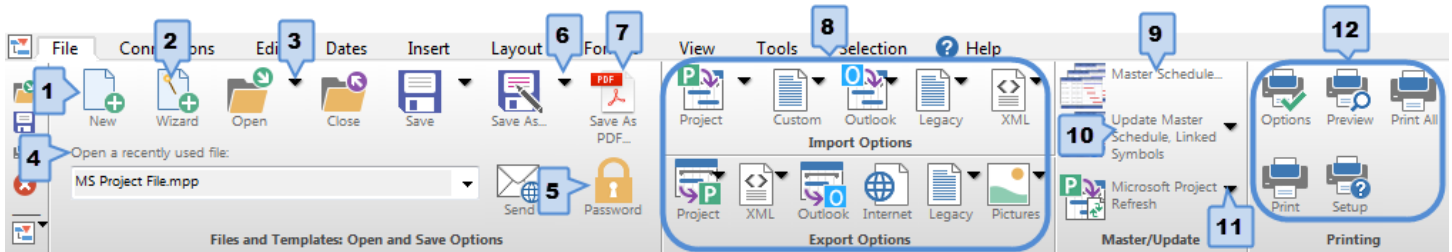


## 8. Import and Export options

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

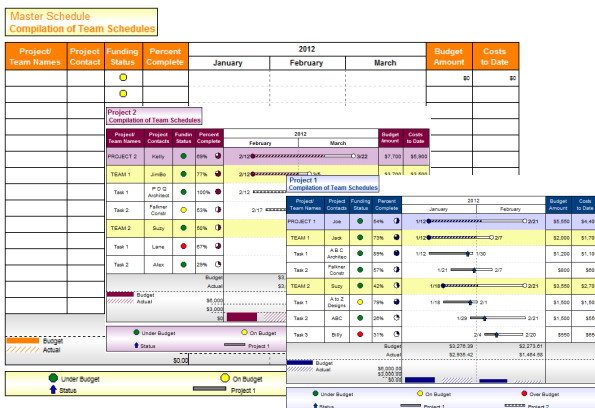


# Getting Started: The File Tab



## 9. Master Schedule

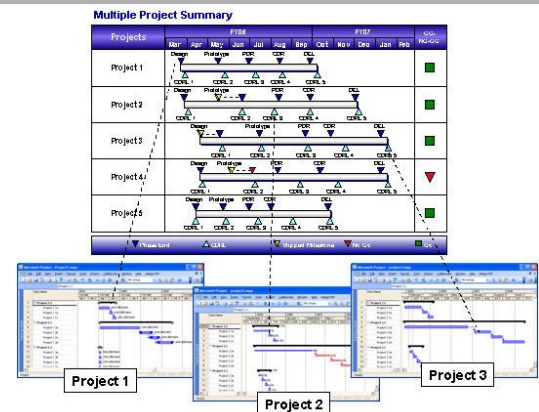
Choose to combine multiple Milestones schedules.



## 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 linked symbols under [Help | Help Topics](#).

## 12. Printing

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

