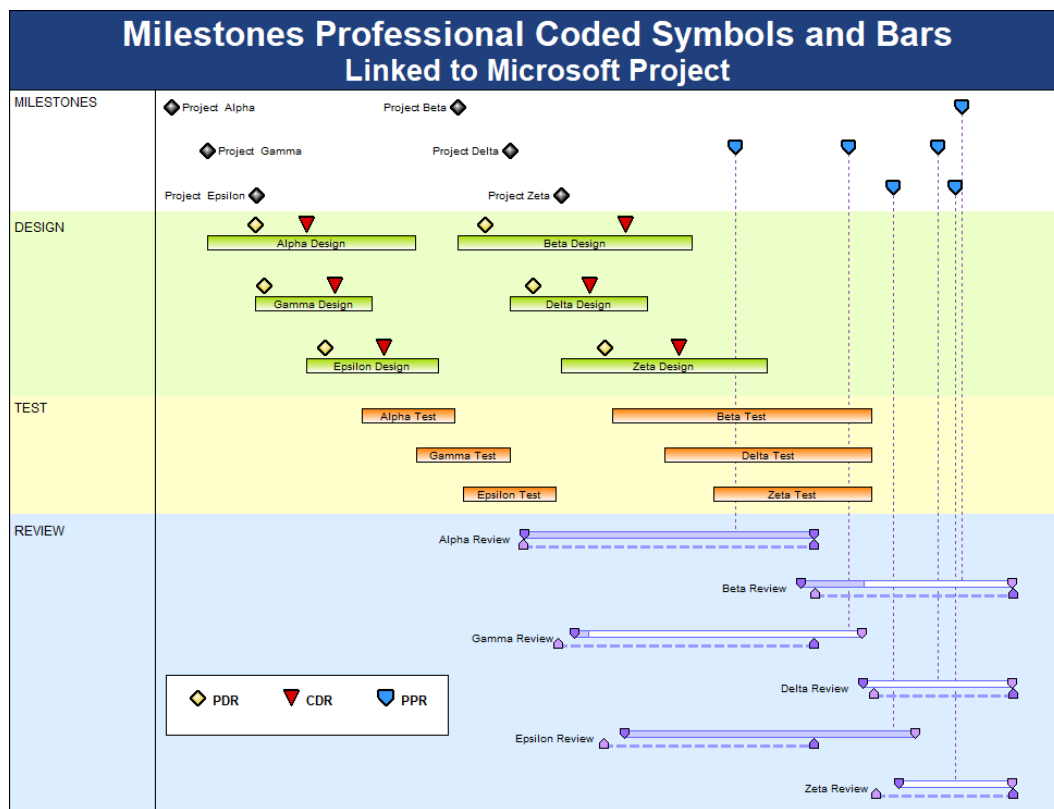# *Create Presentation Reports*
for Microsoft Project

Your guide to Milestones Professional's Interface with Microsoft Project

Milestones Professional offers a direct interface to Microsoft Project, making it easy to generate presentation report formats beyond the standard formats offered by Microsoft Project. Build a schedule using one of Milestones many built-in templates or build one "free-hand" and link it back to Project. Either way, the schedule can be "refreshed" or updated when the Project dates change.


Milestones Professional Coded Symbols and Bars
Linked to Microsoft Project

With Milestones Professional's interface to Microsoft Project, you can:

♦ Use a simple wizard to choose how to present your Microsoft Project schedules.

♦ Create custom Project import templates and add them to the wizard.

♦ Keep presentation schedules up-to-date using "refresh." Update a single Milestones presentation schedule from one Microsoft Project schedule or from several.

♦ Easily add new Project tasks to the Milestones schedule. Add them in one at a time or as a group.

♦ When the Project information is updated in Milestones Professional generate a Comparison schedule to see the old dates compared to the updated dates.

Create reports using a simple wizard

On the **Connections** tab, choose **Create Report from Project** or **Create Report from Project Server** to begin the Project to Milestones Wizard.
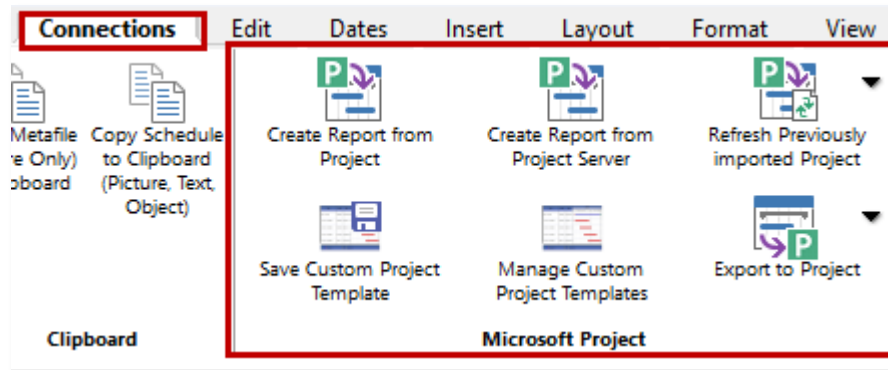
The **Project to Milestones Wizard** offers a visual representation of the schedule as it is created, allowing you to see the effects of the formatting choices you make in a dynamically updated screen.

Start with one of the built-in formats or use your own custom chart to begin. Follow the prompts and watch as your Microsoft Project information is brought into a presentation ready Milestones schedule.
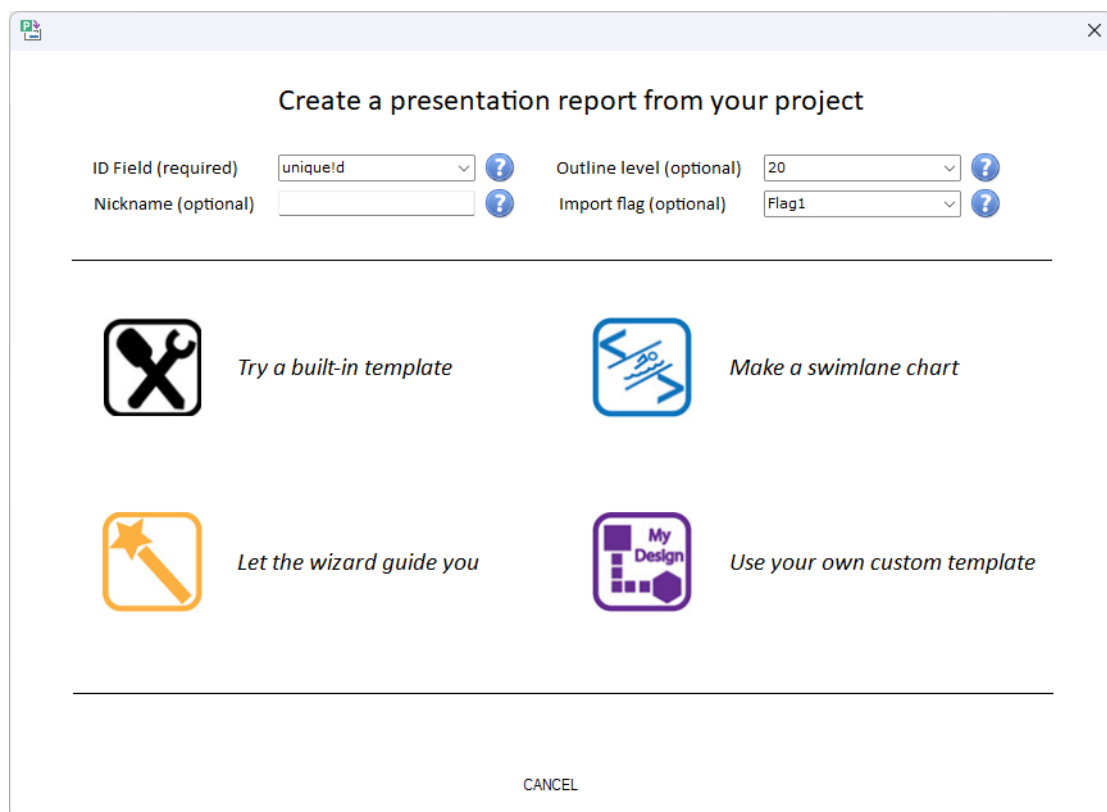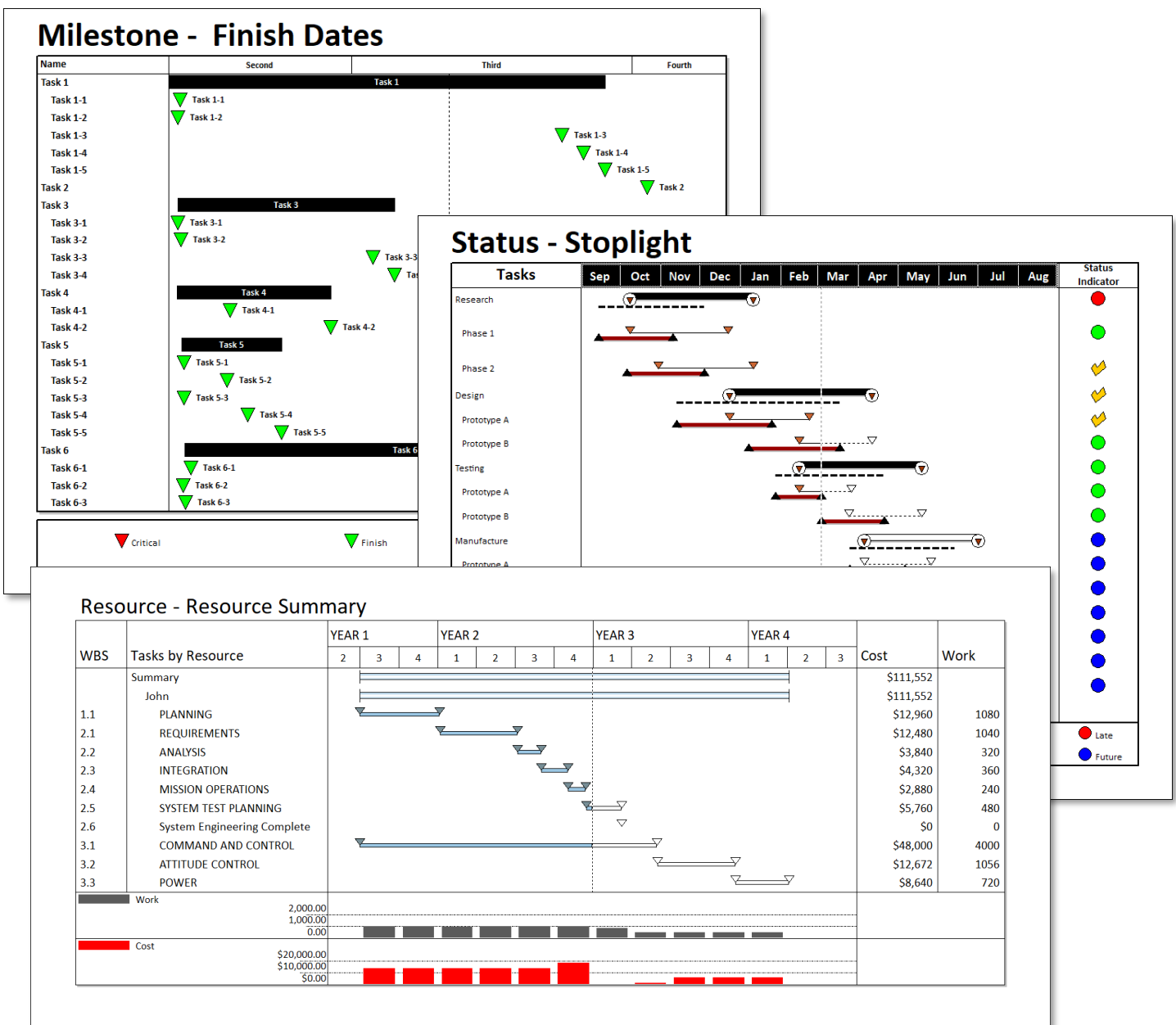
Wizard Import Options

The wizards offer a variety of built-in templates, a Step-by-Step guide for personal selection of the information to be imported, or swimlane style charts using codes to have your information imported just as you like. Then those imported customized schedules can be saved into the Wizard for future importing.

Choose a built-in template

For quick importing the Project to Milestones Wizard offers 10 built-in template categories: Top Templates, Gantt, Stoplight, Milestones, Summary, Earned Value, Resource, Status, Dashboard and Special. Each category has a variety of formats.

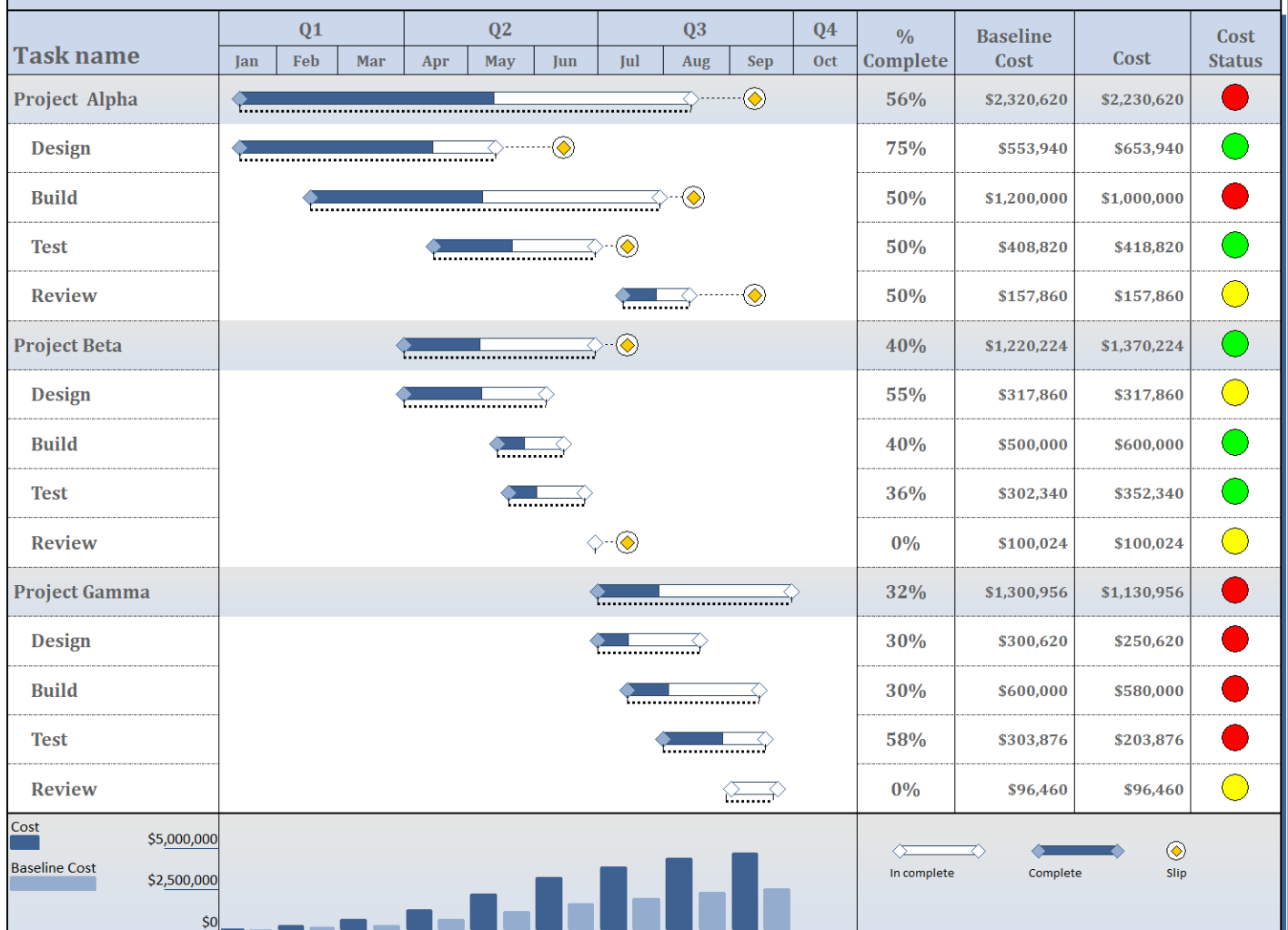# *Create Presentation Reports* For MICROSOFT PROJECT

Wizard Import Options (cont'd.)

Let the wizard guide you

The "Let the Wizard guide you" option offers more flexibility as to what information is imported into the resulting Milestones Professional schedule. The wizard will step you through each element of your schedule.

♦ Select from a built in template or use your own template.

♦ Add Columns to import information from Microsoft Project file's fields.

♦ Add DataGraphs to chart values from the Microsoft Project file.

♦ Add Stoplight columns to highlight tasks status.

♦ Add symbol and note text using information from the Microsoft Project file's fields.

Let The Wizard Guide You

Task name	% Complete	Baseline Cost	Cost	Cost Status
Project Alpha	56%	$2,320,620	$2,230,620	🔴
Design	75%	$553,940	$653,940	🟢
Build	50%	$1,200,000	$1,000,000	🔴
Test	50%	$408,820	$418,820	🟢
Review	50%	$157,860	$157,860	🟡
Project Beta	40%	$1,220,224	$1,370,224	🟢
Design	55%	$317,860	$317,860	🟡
Build	40%	$500,000	$600,000	🟢
Test	36%	$302,340	$352,340	🟢
Review	0%	$100,024	$100,024	🟡
Project Gamma	32%	$1,300,956	$1,130,956	🔴
Design	30%	$300,620	$250,620	🔴
Build	30%	$600,000	$580,000	🔴
Test	58%	$303,876	$203,876	🔴
Review	0%	$96,460	$96,460	🟡

Cost — $5,000,000
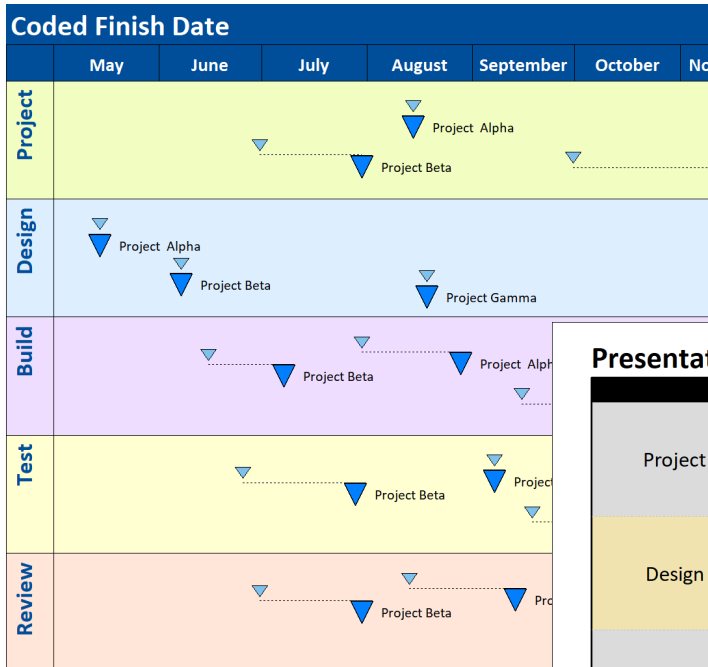Baseline Cost — $2,500,000
$0

In complete   Complete   Slip

Wizard Import Options (cont'd.)

Make a swimlane chart

Do you want to display key tasks or milestones in specified sections with a variety of looks? Try using one of the "coded" templates, specifically designed for making swim lane schedules.

A single code column added to a Microsoft Project file makes it easy for the Project to Milestones Wizard to generate a variety of schedules. These schedules import specific symbology into specified colored swim-lanes.

♦ Coded Microsoft Project file

♦ Milestones Professional coded map-

♦ Milestones Professional coded mapping

Wizard Import Options (cont'd.)

Make a swimlane chart

Try using one of the "coded" templates, specifically designed for making swim lane schedules.

Three code columns added to a Microsoft Project file allows Milestones Professional's Microsoft Project to Milestones Wizard to generate a schedule, using your template, importing task into specific rows with specific symbology (i.e.: start date + bar + end date) and symbols and symbols-horizontal bars-symbol combinations. import specific symbology into specified colored swimlanes.

♦ Coded Microsoft Project file

Number 1 Row	Number 2 Symbology	Number 3 Toolbox Row	Task Name	Start
1	3	1	◢ Project Beta	Mon 4/1/24
3	6	2	Design	Mon 4/1/24
5	6	2	Test	Sat 6/1/24
7	6	2	Review	Fri 8/30/24
2	3	3	◢ Project Gamma	Mon 7/1/24
4	6	4	Design	Mon 7/1/24
6	6	4	Test	Fri 8/30/24
8	6	4	Review	Wed 10/30/24
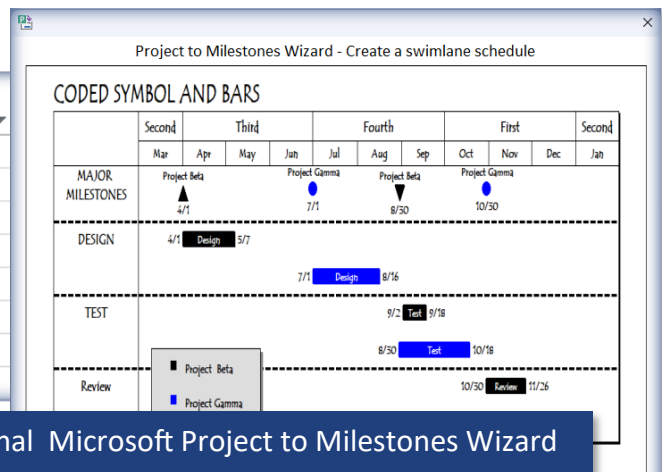
♦ Milestones Professional Microsoft Project to Milestones Wizard
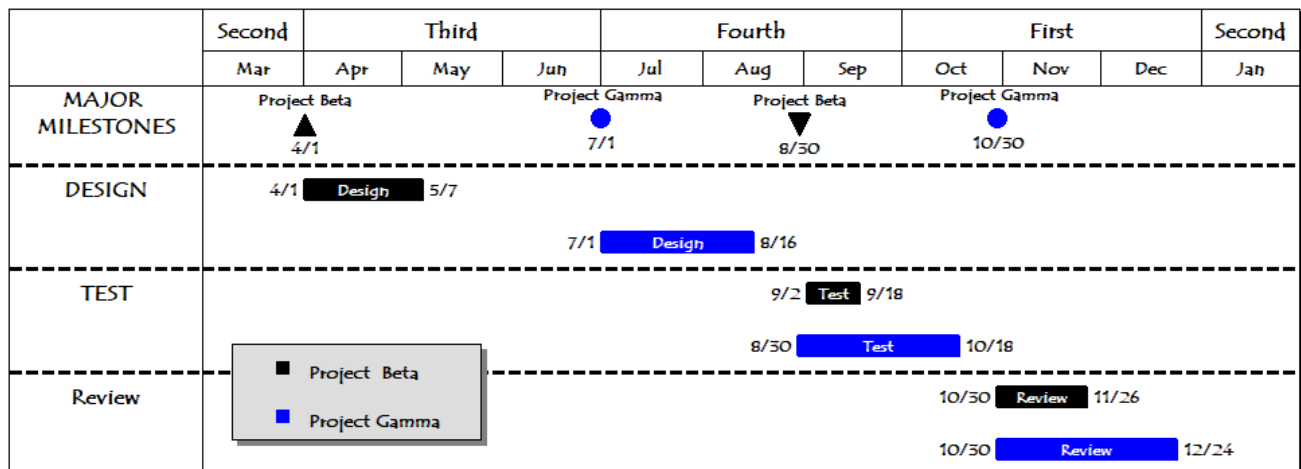
Create Presentation Reports For MICROSOFT PROJECT

Wizard Import Options (cont'd.)

Create a custom template

You have tweaked your Wizard imported schedule to fit your corporate standard. Now, that schedule can be added to the Wizard. Save the schedule as a **Custom Project template**. Then, next time you need to import a Microsoft Project file the saved schedule template will be available in the wizard when you select **Create a custom template**.

Options to Customize:

- ◆ Add columns

- ◆ Customize symbols and symbols-horizontal bars-symbol combinations

- ◆ Add Freefrom text

- ◆ Customize legend

- ◆ Customize schedule colors

- ◆ Customize symbol Note attributes

- ◆ Customize global, and outline horizontal gridlines and shading

- ◆ Customize vertical gridlines

- ◆ Customize font styles for each area of the schedule

Create Presentation Reports For MICROSOFT PROJECT

Build a "Free Form" Presentation Schedule
Link it to Microsoft Project schedule and keep it updated

It's possible to build a presentation chart "free-form" Milestones Professional schedule then link it to your Microsoft Project file(s) for future updates. Or Simultaneously build a Milestones Professional schedule And link it to your Microsoft Project file(s) for future updates.

Build a Milestones Professional schedule then link to Microsoft Project file(s).

♦ Select the Microsoft Project task that corresponds to the symbol to be tagged

	Unique ID	Task Name	Start	Finish
0	0	◢ AERO Build	Mon 1/4/10	Fri 12/21/18
1	1	▷ Phase 1 - Develop Plans	Mon 1/4/10	Thu 10/4/12
8	2	▷ Phase 2 - Develop Prototype	Thu 10/4/12	Wed 11/20/13
16	3	▷ Phase 3 - Build	Fri 10/5/12	Thu 1/18/18
28	43	▷ Phase 4 - Build 2	Mon 1/4/10	Fri 4/17/15

LINK TO ACTIVE MS PROJECT

Project Tasks	Year1	Year2	Year3	Year4
MILESTONES				

♦ Right click the symbol that corresponds to the MS Project task. Select **Link to active MS Project Task**.

Link to Active MS Project Task...
Link to Active MS Project Task FinishDate with UniqueID

Pick these fields

♦ Project **Date Field**

♦ **ID** (unique identifier)

♦ 3 fields for **Symbol Text**

♦ 1 field for **Symbol Notes**

Choose to simply tag the symbol or tag and update the symbol.

Link a symbol to a selected Project task

Date and ID fields

Date Field	Finish
ID for tag	Unique ID	☐ Use ID keyed below
Nickname		

Text and note fields

Symbol Text Line 1	Name	☑ Tag Symbol Text
Symbol Text Line 2	none	
Symbol Text Line 3	none	
Symbol Note	none	

help   tag and update   tag   cancel

LINK TO ACTIVE MS PROJECT

Project Tasks	Year1	Year2	Year3	Year4
MILESTONES				

Phase 1 Develop Plans

1,finish,name,,,,,

♦ Symbol tagged and updated.

Create Presentation Reports For MICROSOFT PROJECT

Build a "Free Form" Presentation Schedule
Link it to Microsoft Project schedule and keep it updated (cont'd)

Simultaneously build
a Milestones Professional schedule and link to Microsoft Project file(s)

♦ Select one or multiple Microsoft Project task(s)

ID		Task Name	Start	Finish
0	0	▲ AERO Build	Mon 1/4/10	Fri 12/21/18
1	1	▲ Phase 1 - Develop Plans	Mon 1/4/10	Thu 10/4/12
2	5	Develop structural plans	Mon 1/4/10	Wed 5/18/11
3	9	Design Internal Layout	Wed 5/18/11	Wed 11/2/11
4	8	Develop Materials Plans and S	Wed 11/2/11	Wed 4/18/12
5	35	Develop materials	Fri 4/20/12	Thu 7/12/12
6	10	Go / No go	Fri 7/13/12	Thu 10/4/12
7	14	Plans Designed and Approv	Thu 10/4/12	Thu 10/4/12
8	2	▲ Phase 2 - Develop Prototype	Thu 10/4/12	Wed 11/20/13
9	11	Develop Prototype plans	Fri 10/19/12	Thu 4/4/13
10	6	Approve Prototype Contractor I	Fri 10/5/12	Thu 12/27/12
11	15	Approve Prototype Contractor '	Thu 10/18/12	Wed 12/12/12
12	16	Build Prototype	Thu 12/20/12	Wed 11/20/13

DEVELOPMENT

- Link to Active MS Project Task with UniqueID
- Link to Active MS Project Task...

♦ Right the task row in the Milestones Professional file. Select **Link to active MS Project Task**. Milestones will retain the previous settings chosen (the date field and the ID for tag) and allow you to link symbols similarly by selecting the **Link to active MS Project Task** showing the selected options.

☑ Add Symbology to schedule

- ○ On single row (Add all dates to the selected row. Do not tag row.)
- ● On new rows (Add all dates to new rows below the selected row. Tag rows.)
- ☐ Outline tasks on new rows   ☑ Ignore Times

Symbology: Milestone: Start and Finish
- ○ Use best symbols and bars
- ● Choose symbols and bars

Toolbox Row: 3

	Type:	Normal	Normal
	Level:	0	0

% Complete   ☐ Set %

♦ Select to put task on same row selected or subsequent rows.
♦ Choose the symbology type: *Bar with Start and Finish*.
♦ Choose the symbol-horizontal bar-symbol combination from the toolbox.
♦ Add Text to symbols.

☑ Tag Symbol Text and Notes

	Start text and note		Finish text and note
Line 1	none	Line 1	Name
Line 2	none	Line 2	none
Line 3	none	Line 3	none
Note	none	Note	none

DEVELOPMENT

Develop structural plans

Develop Materials Plans and Sources

Develop materials
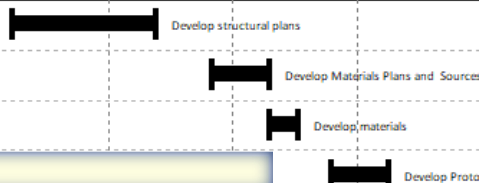
♦ Tagged and ready for Refresh.

11,start,,,,,

Develop Prototype plans

11,finish,name,,,,,
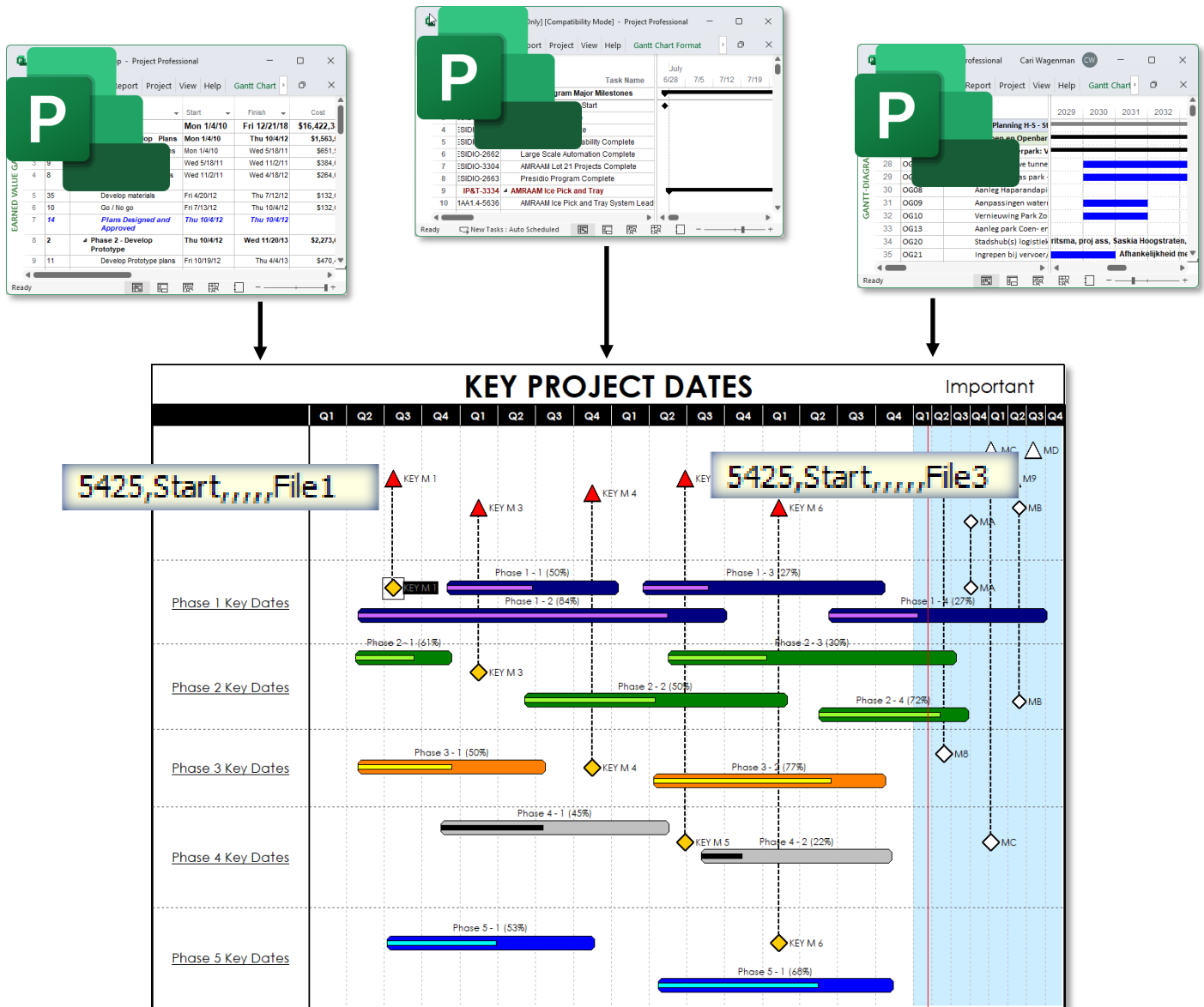
Create Presentation Reports For MICROSOFT PROJECT

Refresh a Milestones Professional File From Multiple Microsoft Project Files

Using Nicknames and a Refresh File List you can build a Milestones Professional schedule from multiple Microsoft Project files and update the Milestones Professional file when the Microsoft Project file changes.

- ♦ Build the Milestones Professional schedule from multiple Microsoft Project files using Nicknames.
  - • Nicknames control over numbering scheme assures guaranteed unique numbering.
- ♦ Set up a Refresh List of the multiple Microsoft Project files for Refresh.
  - • Schedules can be maintained by multiple individuals and brought together by someone who would only need "read-only" access to create the presentation chart.

# *Create Presentation Reports* For MICROSOFT PROJECT

Stay Up To Date as Project Dates Change with "Refresh"

"Refresh" refers to updating symbols' dates, column text, and column values in Milestones Professional with the latest information in the Microsoft Project files that were used to create the Milestones schedule.

♦ Original Microsoft Project File
♦ Original Milestone Professional File

Unique ID		Task Name	Start	Finish
1	5	◢ Project Beta	Mon 4/1/24	Fri 8/30/24
2	6	Design	Mon 4/1/24	Thu 5/30/24
3	7	Test	Sat 6/1/24	Wed 8/28/24
4	8	Review	Fri 8/30/24	Fri 8/30/24
5	9	◢ Project Gamma	Mon 7/1/24	Wed 10/30/24
6	10	Design	Mon 7/1/24	Fri 8/16/24
7	11	Test	Fri 8/30/24	Fri 10/18/24
8	12	Review	Wed 10/30/24	Wed 10/30/24

Project Tasks APRIL Review

♦ Yellow highlight reflects changes in Microsoft Project File

			art	Finish
	5	Project Beta	on 4/1/24	Mon 9/30/24
2	6	Design	Mon 4/1/24	Sun 6/30/24
3	7	Test	Mon 7/1/24	Thu 9/26/24
4	8	Review	Mon 9/30/24	Mon 9/30/24
5	9	Project Gamma	Mon 7/1/24	Wed 10/30/24
6	10	Design	Mon 7/1/24	Fri 8/16/24
7	11	Test	Fri 8/30/24	Fri 10/18/24
8	12	Review	Wed 10/30/24	Wed 10/30/24
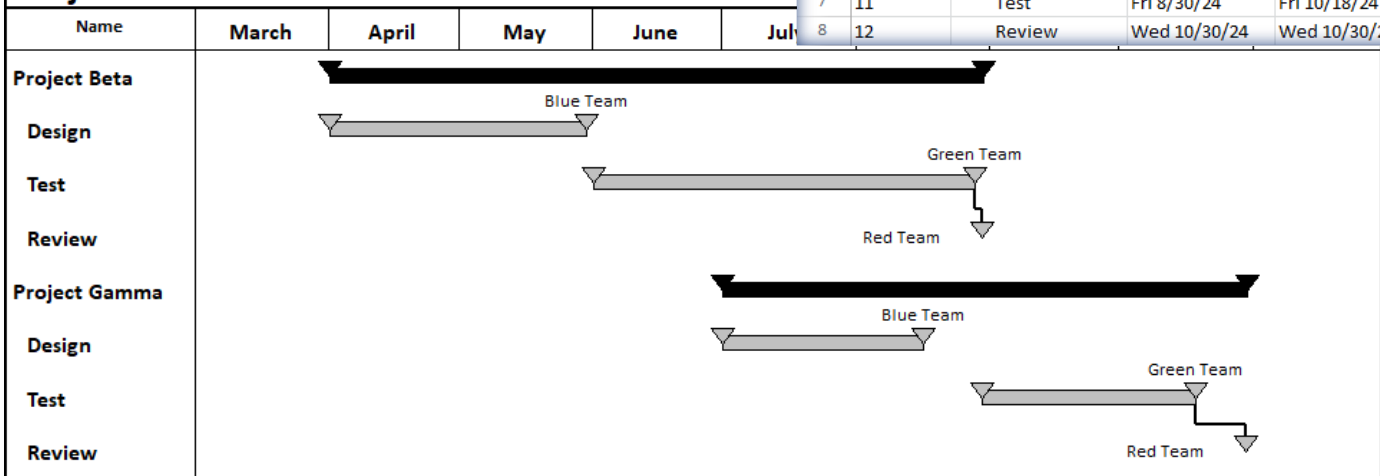
♦ Updated Microsoft Project File
♦ Updated Milestone Professional File

Project Tasks JUNE Review
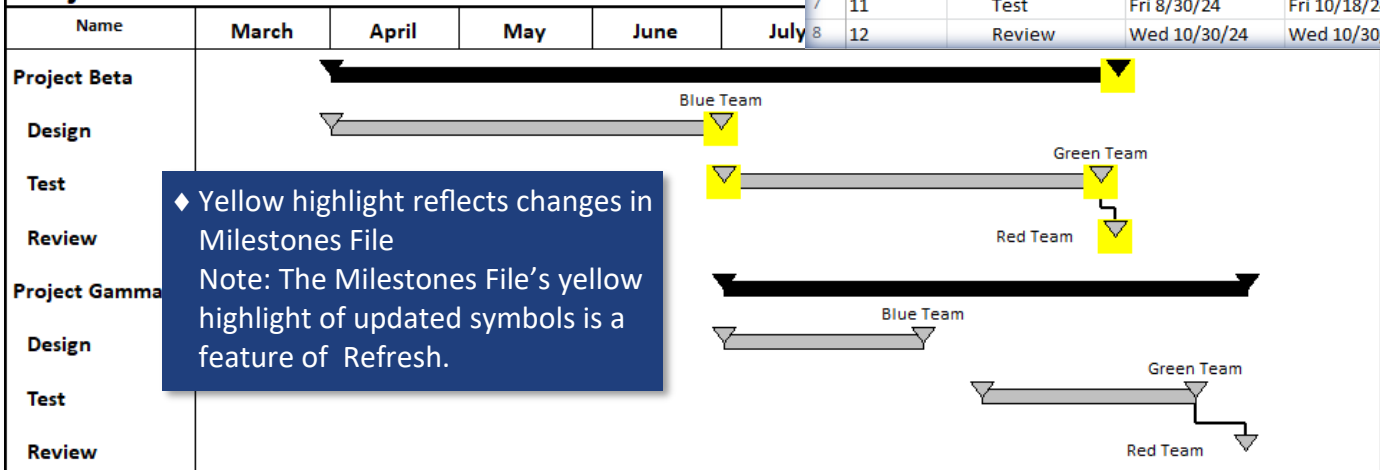
♦ Yellow highlight reflects changes in Milestones File
Note: The Milestones File's yellow highlight of updated symbols is a feature of Refresh.

Create Presentation Reports For MICROSOFT PROJECT

Compare Original Milestones Professional File to Updated File

It is useful to be able to get a report of differences between a Milestones file which was imported from Microsoft Project and your most recently refreshed version of the file (the "updated" file).   Now, with the File Compare feature, it's possible to view a Milestones Professional schedule which graphically presents the changes. Connections ➜ Refresh Previously Imported Project ➜ Compare Tagged Files