

Getting Started with Milestones Professional

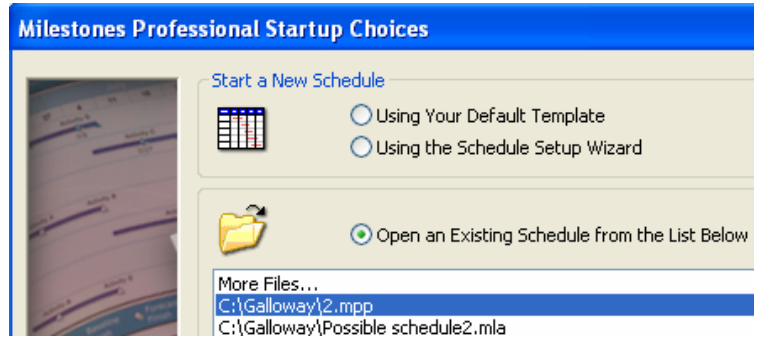
Create a new Schedule:

Use the default template.
Or

Choose the Setup Wizard. (**File/New**).
Or

Choose a predesigned template.

NEXT: Follow the tips below.



Set the Schedule Start and End Dates:

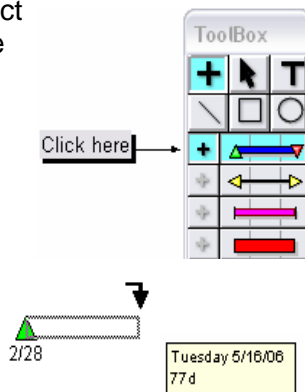
Click the Toolbar **Calendar icon**:

Add a single Milestone Symbol:

1. Click the large Toolbox **Plus Tool**:
2. Select a symbol in the Toolbox.
3. Move the cursor to the schedule area click and drag horizontally. Let go of the mouse button at the selected symbol date.

Add a Bar with Start/End Symbols:

1. In the Toolbox, select the small plus at the beginning of a row.
2. The entire row is highlighted blue.
3. Move the cursor to the schedule area. Click the start date and drag horizontally. Release the mouse button on the end date.



Add Tasks and Column Text:

1. Select the Toolbox **Text Tool**:
2. Click in any column's cell, and start typing.
3. Use the Down Arrow to move to the next line.

Change the Date Headings:

Click the ToolBar **Date Heading icon**:

Change the Schedule Layout (height, width, number of columns and rows):

Click the ToolBar **Page Layout icon**:

Change a Symbol or Connector on the schedule:

1. Select the Toolbox **Arrow Tool**:
2. In the schedule area, click once on a Symbol that you want to change; or the symbol to the left of the Horizontal Connector you want to change; or the symbol atop the Vertical Connector that you want to change.
3. In the Toolbox, click once on a different symbol or connector.


Customize a Toolbox Symbol or Connector:

1. In the Toolbox, double click on a symbol, horizontal connector, or vertical connector.
2. The **Symbol or Connector Options** box allows you to change the shape, fill color, text positioning, date positioning, and more.

The Symbol, Horizontal Connector, or Vertical Connector in the Toolbox is changed, as well as all occurrences on the schedule.

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Add a Vertical Connector Between Symbols:

1. Click the Toolbox large **Plus Tool**: 
2. In the schedule area, click once on the symbol from which you want the vertical connector to begin.
3. In the Toolbox, click once on the vertical connector to be used.
4. In the schedule area, click once on the symbol that completes the connection from the first symbol.


Add a Chart Title:

Choose **Insert | Chart Title**.

Add Symbol Text:

1. Select the Toolbox **Arrow Tool**: 
2. Double-click the symbol on the schedule.
3. On the **Symbol Properties** dialog box click the **Text** tab.
4. Enter up to 3 lines of text in the Symbol Text Line 1, 2, or 3.
5. Under **Text Placement**, select the positioning of the text.


Add Freeform Text:

1. Select the Toolbox **Text Tool**: 
2. Click anywhere on the schedule, and start typing.

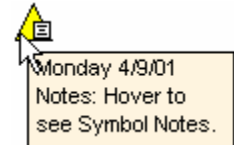
Hide/Show All Symbol Dates and/or Text

1. Choose **View | Override Symbol Date and Text Display**.

Add Symbol Notes:

1. Select the Toolbox **Arrow Tool**: 
2. Double-click a symbol on your schedule.
3. In the **Symbol Properties** dialog box, select the **Notes** tab and enter the text.

This text is embedded in the symbol and appears when the cursor hovers over the symbol.



Print Symbol Notes:

1. Choose **Tools | Reports | Symbols | Symbol Notes**.

Shift all Dates by a # of days:

1. Choose **Edit | Shift all Dates**.
2. Enter the number of days.
3. Choose **Forward** or **Backward**.

Add Legend:

1. Choose **Format | Legend**.
2. Enter a height (Example .8) or choose **Floating Legend**.
3. Enter number of entries per row.

Add Legend Entry:




1. Choose **Insert | Legend Entry**.
2. Enter text.
3. Select the symbol and connector to be associated with the text.

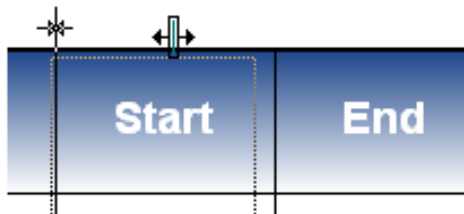
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Add a Column:

Choose **Insert | Column** and pick from available column types.

Move a Column:

1. Select the Toolbox **Arrow Tool**: 
2. Move the cursor on top of the column heading's border. The cursor changes to: 
3. Click and drag to the new location, as shown by the insertion pointer: 



Add Percent Complete Pie Column:

1. Choose **Insert | Column | Percent Complete**.
2. Choose **Show symbol only**.
3. If the **Change Symbol Type** dialog box appears choose **Yes**.



Add Baseline Start or End Date Column:


1. Choose **Insert | Column | Dates**.
2. Choose **Baseline Start Date** or **Baseline End Date**.

Add Stoplight Column:

1. Choose **Insert | Column | Stoplight**.
2. Choose **Standard Stoplight** or **Custom Stoplight**.




Change an Existing Column's Type:

1. Select the Toolbox **Arrow Tool**: 
2. Double-click the column heading cell.
3. Click the **Column Type (SmartColumn) Settings** tab.
4. On the **SmartColumn Definition** pull down menu, select a SmartColumn type.



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Outline a Schedule:

1. Double-click the column heading for the column which contains the information you want to outline.
2. Click the **Column Formatting** tab.
3. Under **Indenting for Outlining**, enter a value (such as 0.3).
4. Highlight the task lines to be indented and use the indent tool  to indent the task line to the appropriate outline level.

Add Summary Bars

1. Choose **Format | Summary Bar Settings**.
2. Choose symbols and a connector to display for summary bars and choose other summary bar options.
3. To have control over the levels of summary to view, choose **View | Collapse/Expand Indicators**.

Add Baseline:

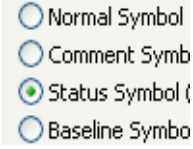
Use the **Baseline Setup Wizard**, to establish standard symbology for task and summary lines in the Toolbox.

1. Choose **Format | Baseline Setup**.
2. Follow the Wizard's instructions as you choose symbols and connectors to show baseline.

Once you have set-up your baseline symbology in the Toolbox refer to **Add a Symbol, Horizontal Connector, Symbol** instructions (page 1).

Add a Status Symbol:

By default, status in Milestones Professional is based on the current date. To override the current date as status:

1. Double click on a symbol in the Toolbox you are not currently using.
2. In the **Symbol Options** dialog box select the **Symbol Shape** tab. 
3. Select **Status Symbol**.
4. Add the symbol to any task line for which you want to adjust the status. Refer to **Add a Single Milestone Symbol** instructions (page 1).

Show Progress:

1. Choose **Format | Dates | Symbols-Fill to Status**.
2. Choose **Format | Dates | Connectors-Fill to Status**.
3. By default, the symbol and connectors after the current date or status symbol will be void of color.
4. If you would like to show after status of the symbol as colored, double click on the symbol in the Toolbox.
5. Choose the **Color/Pattern...** tab and pick an **After Status Color**.
6. If you would like to show after status of the connector as colored, double click the connector in the Toolbox.
7. Pick an **After Status Fill Color**.

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Add Earned Value Columns:



1. Choose **Insert | Column | Earned Value**.
2. Select from the Earned Value calculation columns available.

Print Earned Value Reports:

1. Choose **Tools | Reports | Earned Value**.

Create Presentation Schedules from MS Project Files

(MS Project must be installed on your computer):

1. Choose **File | Open | MS Project MPP File**. 
2. Once you select and Open your **MPP** file the **MS Project Wizard** will start.
3. Choose from a variety of schedule types, including: Milestone, Gantt, Summary, Performance, Resource, Earned Value, Coded Summary and Custom. 
4. Choose from a list of distinct schedule formats based on the type of schedule you chose.
5. The wizard will then lead you through formatting options unique to each schedule.



Print a Schedule:

Milestones Professional offers a variety of printing options.

Change the output size:

1. Choose **File | Printing Options | General tab | Specify Output Size**

Print a specific date range:

1. Choose **File | Printing Options | Print tab | Date Range Adjustment...**

Exclude column(s) when printing:

1. Choose **File | Printing Options | Exclude Columns** tab.

Distribute your Schedule:

Free Milestones Viewer:

1. Download from www.kidasa.com.

Create PDF:

1. Choose **File | Save As PDF**.

Copy all pages to PowerPoint:

1. Choose **Edit | Copy All Pages to PowerPoint**.

Copy and paste to Word and other products:

1. Choose **Edit | Copy Metafile to Clipboard**.
2. In other product, Choose **Edit | Paste**.

Publish your schedule to the Internet:

1. Choose **File | Internet Publishing**.
2. The Wizard will guide you!