

# Getting Started with Milestones Professional

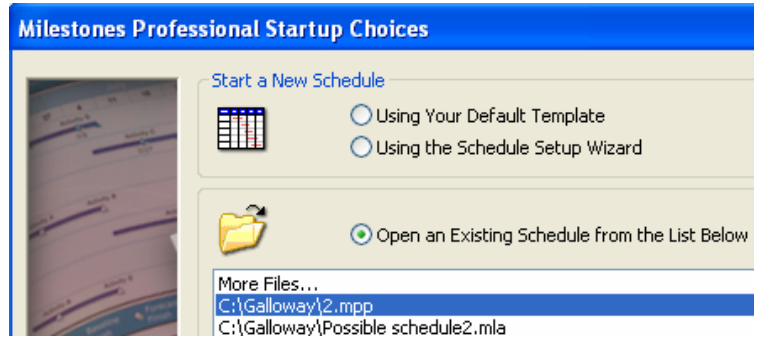
## Create a new Schedule:

Use the default template.  
Or

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


Choose a predesigned template.

**NEXT:** Follow the tips below.



With the new context sensitive toolbar you may simply click on specific areas in the Milestones Window to change and add attributes to your schedule.

## Set the Schedule Start and End Dates:

1. Click the **Dates** menu.
2. In the **Start and End Dates** section enter the **Displayed Start Date** and the **Displayed End Date**:
3. Click the **Apply** button: 


## Change the Date Headings:

Click the actual date heading. The context sensitive toolbar will change to show the many attributes of the Date headings. Make your selections.

## Change the Schedule Layout (height, width, rows and legend):

Click the **Layout** tab: Choose the attributes to be added or changed.


## Add Tasks and Column Text:

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

## Add a Chart Title:

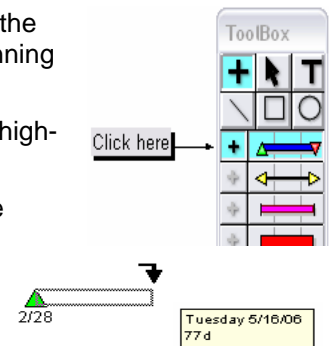
1. Choose **Insert** menu.
2. **In the Title Section** click on the **Insert/Edit Chart Title** icon: 

## Add a single Milestone Symbol:


1. Click the Toolbox large **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 appropriate 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 will be highlighted in blue.
3. Move the cursor to the schedule area. Click on the start date and drag horizontally then release the mouse button on the end date.




## Add a Vertical Bar 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 bar to begin.
3. In the Toolbox, click once on the vertical bar to be used.
4. In the schedule area, click once on the symbol that completes the connection from the first symbol.

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## 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 Bar you want to change; or the symbol atop the Vertical Bar that you want to change.
3. In the Toolbox, click once on a different symbol, horizontal Bar or vertical connector.

## Customize a Toolbox Symbol or Connector:


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

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


## Add Symbol Text:

1. With the arrow tool click the symbol on the schedule, The context sensitive 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. Under **Text Placement** section, select the positioning of the text.


## Add Freeform Text:

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

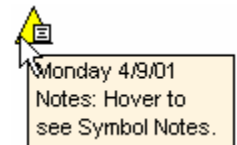
## Hide/Show All Symbol Dates and/or Text

1. Choose **View** menu, in the **Other** section click the **Override Symbol Text and Symbol Date Display** icon: 

## Add Symbol Notes:

1. With the arrow tool click the symbol on the schedule, The context sensitive toolbar will change to the **Selection** tab.
2. Choose the **Note** tab.
3. In the **Symbol note** section enter your notes
4. Click the **Apply** button: 

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



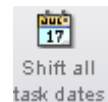
## Print Symbol Notes:

1. Choose the **Tools** menu.
2. In the **Reports** section click the **Symbol** icon.
3. Choose **Symbol Notes**.



## Shift all Dates by a # of days:

1. Choose the **Dates** menu.
2. In the **Date range** section click the **Shift all task dates** icon:
3. Enter the number of days. Then choose **Forward** or **Backward**.



## Add Legend:


1. Choose the **Layout** menu.
2. In the **Legend Size** section click on **Full Legend Settings**. The context sensitive tool bar changes to **Selection** menu **Current Object Legend** showing attribute options.
3. In the legend size and Frame Settings section enter **Legend Height**, i.e.) and **Entries per Row**, i.e.).
4. Review and choose the other attributes available for your legend.

## Add Legend Entry:

1. Choose the **Insert** menu.
2. In the **Picture, Legend** section choose **New Legend Entry**.
3. In the **Legend Entry Settings** section enter **text** in **Line 1** and/or **Line 2**. Click **Apply**.
4. Then select the **Symbol, Bar, Symbol** associated with the legend text.


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## Add a Column:


1. Click **Insert** menu.
2. In the **Rows Columns** section choose **New Column** icon: 

3. Pick from available column types.

## Change an Existing Column's Type:


1. Select the Toolbox **Arrow Tool**:
2. Click the column heading cell, of the column you want to change.
3. In **Current Object Column Heading** section, click the **Switch to Column** icon: 
4. Choose the scroll arrow in the **Column Type and Format** section. Pick from the available column types.

## Add Percent Complete Pie Column:

1. Click **Insert** menu.
2. In the **Rows Columns** section choose **New Column** icon: 
3. Pick **Percent Complete**.
4. Choose **Show symbol only**. Press **OK**.
5. If the **Change Symbol Type** dialog box appears choose **Yes**. Then **OK**.




## Add Spotlight Column:

1. Click **Insert** menu.
2. In the **Rows Columns** section choose **New Column** icon: 
3. Pick **Spotlight....**
4. Choose **Standard Spotlight** or **Custom Spotlight**.



## Add Baseline Start or End Date Column:

1. Click **Insert** menu.
2. In the **Rows Columns** section choose **New Column** icon: 
3. Pick **Dates**.
4. Click on **Baseline Start Date and/or Baseline End Date**.


## Add Baseline:

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

1. Click **Layout** menu.
2. In the **Other** section choose **Baseline Settings**.
3. 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 Earned Value Columns:



1. Click **Insert** menu.
2. In the **Rows Columns** section choose **New Column** icon: 
3. Pick **Earned Value**.
4. Select from the Earned Value calculation columns available.

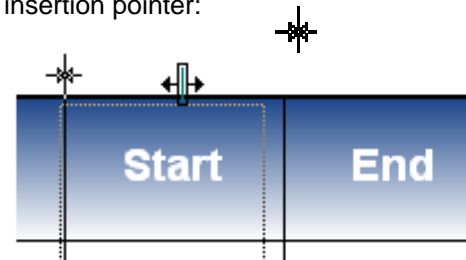
## Print Earned Value Reports:

1. Choose **Tools** tab.
2. In the **Reports** section click the **Earned Value** icon:






## 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:



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## Outline a Schedule:

1. Select the Toolbox **Arrow Tool**:
2. Click the column heading cell, of the column you want to change.
3. In **Current Object Column Heading** section, click the **Switch to Column** icon: 
4. In the **Column Type and Format** section enter a value (such as 0.3) in the Indent per Outline Level box. Press **Apply** button: 
5. Highlight the task lines to be indented. The tool bar changes to **Selection** tab **Current Object: Task Row**, in the **Task Row Settings** section click the **Outline Level** tool  to indent the task line to the appropriate outline level.

## Add Summary Bars

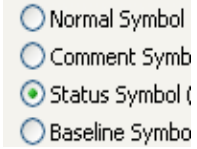
1. Choose the **Layout** tab. In the **Other** section choose **Summary Bar Settings...**
2. Choose symbols and a connector to display on all summary bar levels as well as display summary bar options.
3. To have control over the levels of summary to view, choose **View** menu in the **Optional Items** section, check on **Collapse/Expand Indicators**.

## Show Progress:

1. Choose **Dates** menu in the **Date Related Settings** check on **Symbols: Fill to Status Date** and **Bars: Fill to Status Date**.
2. By default, the symbol and connectors after the current date or status symbol will be void of color.
3. If you would like to show after status of the symbol as colored, double click on the symbol in the toolbox.
4. Choose the **Color/Pattern...** tab and pick an **After Status Color**.
5. If you would like to show after status of a bar as colored, double click the bar in the Toolbox.
6. Pick an **After Status Fill Color**.

## 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).

## Create a Master Schedule

Develop all lower level schedules and the master schedule in the same format.

1. Open the blank master schedule.
2. Choose the **File** menu.
3. In the **Master/Update** section choose **Master Schedule...**
4. Choose **Treat Current Schedule as Master Schedule**.
5. Review then choose from other Master schedule options.
6. Click **Add Schedule...** then find your lower level schedule to be imported. Repeat for each schedule to be imported.
7. Press **OK** there will be no change on the schedule.
8. Choose the **File** menu.
9. In the **Master/Update** section click **Update Master Schedule, Linked Symbols** then click **Master Schedule**.
10. A dialog box of the results of the master schedule update will appear. Click **OK**.
11. Your master schedule will appear and be updated.

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## Visually enhance your schedule with color and variant effects:

By choosing the **Format** Menu you can:

Add a color theme:

In the **Color Themes** section choose the scroll arrow and choose from predesigned themes.

Add schedule background color and effects:

In the **Frame, Highlights** section choose **Background, color, border, frame corners**.

Add gridline color and effects:

In the **Gridlines** section choose **Horizontal Vertical** or **Gridline Shading Font Sizes by Outline level**.

Add curtains:

In the **Vertical Shading** section choose **Curtains (Shade by Date Range)**...

## Create Presentation Schedules from MS Project Files

(MS Project must be installed on your computer):

1. Choose the **Connections** menu.
2. Choose Create Report from Project.
3. Find your **MPP** file, the file will then open and our **MS Project Wizard** will start.
4. Choose from a variety of schedule types, including: **Milestone, Gantt, Summary, Performance, Resource, Earned Value, Coded Summary and Custom**.
5. Then choose from a list of distinct schedule formats based on the type of schedule you chose.
6. The wizard will then lead you through formatting options unique to each schedule.



## Print a Schedule:

Milestones allows you a variety of printing options. By choosing the **File** menu you can:

Change the output size:

In the Printing section click **Printing Options | General tab | Specify Output Size**

Print a specific date range:

In the Printing section click **Printing Options | Print tab | Date Range Adjustment...**

Exclude column(s) when printing:

In the Printing section click **Printing Options | Exclude Columns** tab.

## Distribute your Schedule:

Free Milestones Viewer:

Download from [www.kidasa.com](http://www.kidasa.com).

Create PDF:

Choose the **File** menu, in the **Files and Templates: Open and Save Options** click **Save As PDF**.

Copy all pages to PowerPoint:

Choose the **Connections** menu, in the Microsoft Office PowerPoint section click **Copy All Pages to PowerPoint**.

Copy and paste to Word and other products:

1. Choose the **Connections** menu, in the **Clipboard** section click **Copy Metafile to Clipboard**.
2. In other product, Choose **Edit | Paste**.

Publish your schedule to the Internet:

1. Choose the **Connections** menu, in the other section click **Internet Publishing Wizard**.
2. The Wizard will guide you!