

Getting Started with Milestones Project Companion

With the enhanced toolbar you can click on specific areas in the Milestones Window to change and add attributes to your schedule.

Create Presentation Schedules from Microsoft Office Project Files

(Microsoft Office 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 **Microsoft Office 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.

Make a custom template:

1. Import an MPP file using one of the standard formats in the Project wizard.
2. Customize the schedule.
3. Choose **File | Save As Custom Project Import Template** and save the schedule in a common folder.
4. To use, from within the wizard, choose the **Custom** chart type.
5. Choose the template name saved in #3.

Add Freeform Text:

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

Update a presentation schedule when your Microsoft Office Project dates change

1. Open the presentation Milestones Project Companion schedule.
2. Choose **Refresh Previously Imported Project** on the **Connections** menu / **Microsoft Office Project** section.
3. If the name of the Microsoft Project file is not presented, browse to locate the file.
4. Follow the instructions presented.



Add a Microsoft Office Project Field to a presentation chart previously imported via the Wizard:

1. Choose the **Insert** tab.
2. Choose **New Column** and then **Microsoft Office Project column.**
3. Pick the Microsoft Office Project field to add.
4. **Save** the Milestones chart.
5. On the **Connections** tab, choose **Refresh Previously Imported Project** to bring in the

Visually enhance your schedule

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)...**


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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:

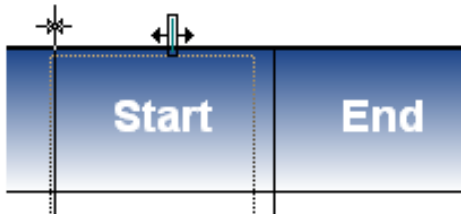
1. Select the Toolbox **Arrow Tool**:
2. Click the column heading cell, of the column you want to change.
3. In **Current Object Column Heading** section, click the **Switch to Column** icon: 
4. Choose the scroll arrow **in the Column Type and Format** section. Pick from the available column types.

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: 

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: 



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.

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:

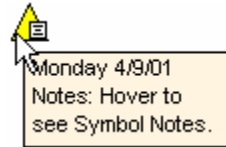
1. Choose the **Connections** menu, in the other section click **Internet Publishing Wizard**.
2. The Wizard will guide you!

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Add Symbol Notes:

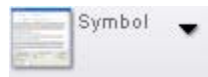
1. With the arrow tool click the symbol on the schedule, The context sensitive toolbar will change to the **Selection** tab.
2. Choose the **Note** tab (below the selections).
3. In the **Symbol note** section enter your notes
4. Click the **Apply** button 

This text 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**.



Add or change the Chart Title:

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

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**.


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

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

Change the Date Headings:

Click the schedule's date heading. The enhanced toolbar will change to show the available selections for the date heading.

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 Stoplight Column:

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



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 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 with **Current Object: 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.