Milestones PROFESSIONAL

Getting Started

Create a new Schedule:

Use the **Default Template**.

OR

Choose the **Schedule Setup Wizard**.

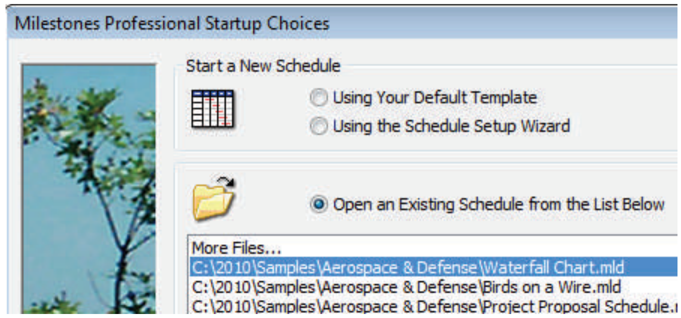
Create a schedule **Step-by-Step**

or

Select Predesigned Template

OR

Choose an **Existing Schedule**.



With the 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. On the toolbar, click **Dates.**
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 changes to show the many attributes of the date headings. Make your selections.

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

1. On the toolbar, click **Layout**.
2. Choose the attributes to be added or changed.

Add Tasks and Column Text:

1. In the toolbox, select the **T** (text) tool:
2. Click in any column's cell and start typing.
3. Use the keyboard **Down Arrow** to move to the next line.

Add a Chart Title:

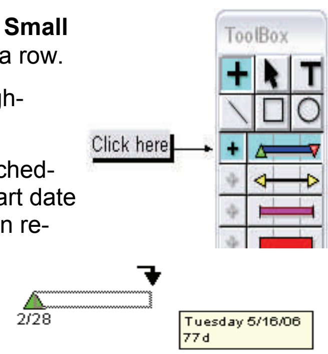
1. On the toolbar, click **Insert** .
2. In the **Title** section, click on **Insert/Edit Chart Title**.
3. Type in a title then choose the attributes to be added or changed.

Add a Single Milestone 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 click and drag horizontally. Let go of the mouse button at the selected symbol date.

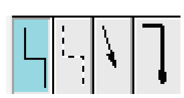
Add a Bar with Start/End Symbols:

1. In the toolbox, select the **Small Plus** at the beginning of a row.
2. The entire row 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 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 vertical link 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 that completes the vertical link .



Change a Symbol or Connector 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; or the symbol to the left of the horizontal bar you want to change; or the symbol atop the vertical link 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 link.
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 link in the toolbox is changed, as well as all occurrences on the schedule.

Add Freeform Text:

1. In the toolbox, select the **T** (text) tool:
2. Click anywhere on the schedule, and start to type.

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. In the **Text Placement** section, select the positioning of the text.

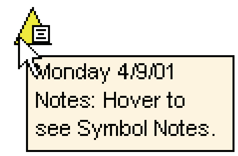
Hide/Show All Symbol Dates and/or Text

1. On the toolbar, click **View**,
2. In the **Other** section, click the **Override Symbol Text and Symbol Date Display** icon:

Add Symbol Notes:

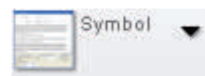
1. With the arrow tool, click the symbol on the schedule, the context sensitive toolbar will change to the **Selection** tab.
2. Choose the **Notes** tab.
3. In the **Symbol Note** section, type in your notes
4. Click the **Apply Text Changes** button:

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



Print Symbol Notes:

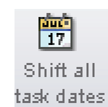
1. On the toolbar, choose **Tools**.
2. In the **Reports** section, click the **Symbol** icon.



3. Choose **Symbol Notes**.

Shift all Dates by a # of days:

1. On the toolbar, click **Dates**.
2. In the **Date Range Tools** section click the **Shift all task dates** icon:



3. Enter the number of days. Then choose **Forward** or **Backward**.

Add a Legend:

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

Add a Legend Entry:

1. On the toolbar, click **Insert**.
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 the **Apply Text Changes** button.
4. Then select the **Symbol**, **Bar**, **Symbol** associated with the legend text.

Add a Column:

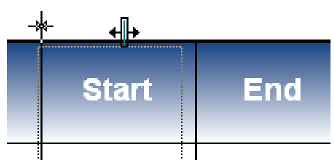
1. On the toolbar, click **Insert**.
2. In the **Rows,Columns** section choose **New Column**.
3. Pick from available column types.

Change an Existing Column's Type:

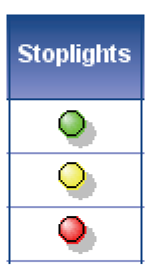
1. In the toolbox, select the **Arrow** tool:
2. Click the column heading cell, of the column you want to change. The toolbar will change to the **Selection** tab **Current Object Column Heading**.
3. In **Current Object Column Heading** section, click the **Switch to Column** icon:
4. Choose the scroll arrow in the **Column Type and Format** section. Pick from the available column types.

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:
3. Click and drag to the new location, as shown by the insertion pointer:

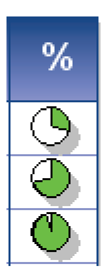


Add a Stoplight Column:



1. On the toolbar, click **Insert**.
2. In the **Rows,Columns** section choose **New Column**.
3. Pick **Stoplight….**
4. Choose **Standard Stoplight** or **Custom Stoplight**.

Add a Percent Complete Pie Column:



1. On the toolbar, click **Insert** .
2. In the **Rows,Columns** section choose **New Column**.
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 Earned Value Columns:

1. On the toolbar, click **Insert**
2. In the **Rows,Columns** section choose **New Column**.
3. Pick **Earned Value**.
4. Select from the **Earned Value** calculation columns available.

Print Earned Value Reports:

1. On the toolbar, click **Tools**.
2. In the **Reports** section, click the **Earned Value** icon:
3. Select from the variety of report options.

Add Baseline Start or End Date Column:

1. On the toolbar, click **Insert**.
2. In the **Rows,Columns** section choose **New Column**.
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. On the toolbar, click **Layout**.
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 Bar with Start/End Symbols** instructions (page 1).

Outline a Schedule:

1. In the toolbox, select the **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 the apply button:
5. Using the arrow tool, in the toolbox, select the task lines to be indented. The task line will highlight.
6. 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. On the toolbar, click **Layout**.
2. In the **Other** section, choose **Summary Bar Settings….**
3. Select symbols and a connector to display on all summary bar levels and the display summary bar options.
4. To have control over the levels of summary to view, choose **View** on the toolbar.
5. In the **Optional Items** section, check on **Collapse/ Expand Indicators**.

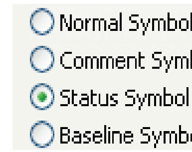
Show Progress:

1. On the toolbar click **Dates.**
2. In the **Date Related Settings**, check on **Symbols: Fill to Status Date** and **Bars: Fill to Status Date**.
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/size/Shadow** tab and pick an **After Status 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. On the toolbar, click **File**.
3. In the **Master/Update** section choose **Master Schedule….**
4. Choose **Treat Current Schedule as Master Schedule**.
5. 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. On the toolbar, click **File**.
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 generated or updated.

Visually enhance your schedule with color and variant effects:

By choosing **Format** on the toolbar 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. On the toolbar, click **Connections** .
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 **File** on the toolbar 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:

1. On the toolbar click, **File**.
2. In the **Files and Templates: Open and Save Options** section, click **PDF**.

Copy all pages to PowerPoint:

1. On the toolbar, click **Connections**.
2. In the **Microsoft Office PowerPoint** section, click **Copy All Pages to PowerPoint**.

Copy and paste to Word and other products:

1. On the toolbar, click **Connections**,
2. In the **Clipboard** section, click **Copy Metafile to Clipboard (Picture)**.
3. In the other product, choose **Edit** | **Paste**.

Publish your schedule to the Internet:

1. On the toolbar, click **Connections**,
2. In the **Other** section, click **Internet Publishing Wizard**.
3. The Wizard will guide you!

For MORE Help: Within Milestones Professional Choose **Help | Help Files | Help**
or check out our **Support** page at **www.kidasa.com**.