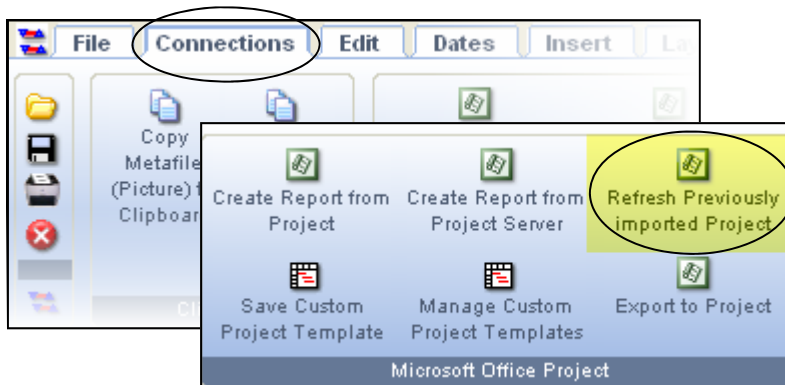


Refresh a Previously Imported Project



"Refresh" refers to updating symbols' dates, column text, and column values in Milestones Project Companion or Milestones Professional with the latest information in the Microsoft Office Project file that was used to create the Milestones schedule. Optionally, new tasks in the Microsoft Office Project file are added to the end of the Milestones schedule.



When the Milestones Project Wizard creates a presentation schedule from a Microsoft Project schedule, task start and end dates are tagged with a Unique ID number from Microsoft Project and the word "start", "finish", "baselinestart", "baselinefinish", or other date type. Microsoft Project fields such as task name, percent complete, BCWP, and so on are similarly tagged on the Milestones presentation schedule.

To view an example of a symbol's tag, click the symbol on the schedule. The toolbar changes to **Current Object Symbol**. Then select the **Symbol Links** tab in the **Incoming Link and Automation Tag** section and view the **Automation Tag** box.

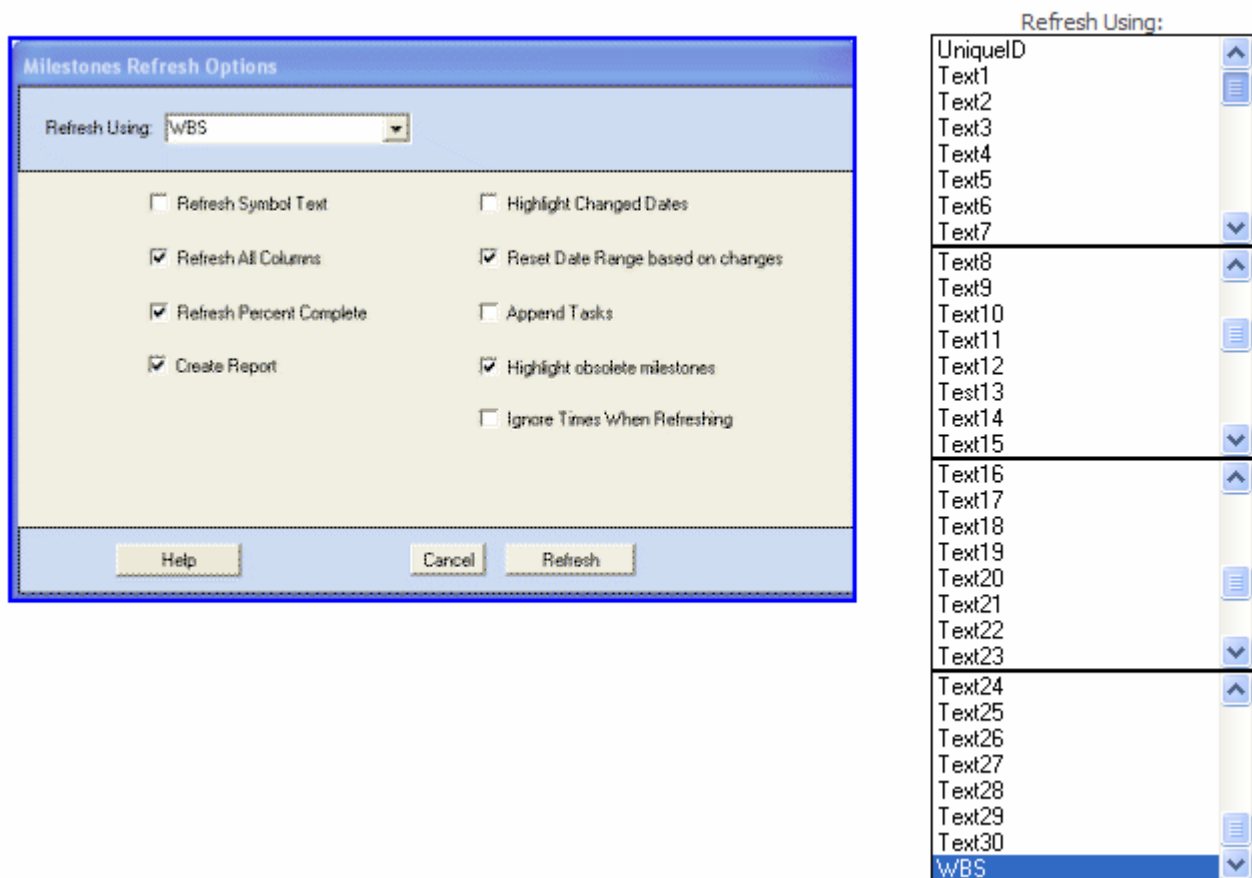
During the refresh process, tagged items in Milestones are matched to their counterparts in the selected Microsoft Project file. All tagged items are replaced with the latest data from the Microsoft Office Project file.

Thus, if a start date changes in the Microsoft Office Project file, refresh will update that same start date in the Milestones schedule.

Refresh a Previously Imported Project (Cont'd)

How to refresh a Milestones schedule's data with updated Microsoft Project schedule dates:

1. Open the Milestones Project Companion or Milestones Professional schedule that was created by importing an Microsoft Office Project schedule.
2. Choose the **Connections** tab in the Microsoft Office Project section. Then choose **Refresh Previously imported Project**.
3. Browse to find the Microsoft Project schedule that generated this Milestones schedule.
4. Click once on the Microsoft Project file and choose **Open**. This dialog box below appears:



- **Refresh Using:** If, when the Milestones schedule was created, symbols were tagged with a Microsoft Office Project field other than UniquelD, it's possible to select that field and use it to refresh the schedule.
- **Refresh Symbol Text:** updates text/values attached to symbols with the source field's text/values
- **Refresh All Columns:** updates column text/values with the source field's text/values
- **Refresh Percent Complete:** updates each status symbol, according to the latest percent complete values. The status symbol controls the fill-to-status for connectors and symbols.

Refresh a Previously Imported Project (Cont'd)

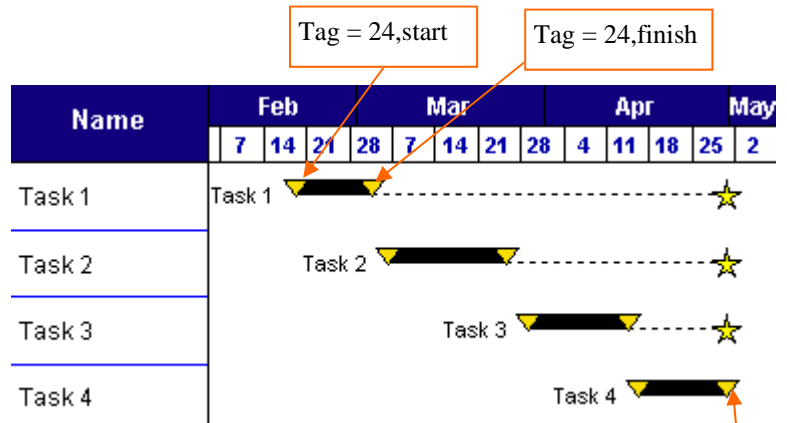
- **Create Report:** generates a report of fields which were updated. Report is both placed 1) on the clipboard and 2) saved to the user's My Documents folder. The name of the report is milesrefreshfile. (milesrefreshfile.txt)
- **Highlight changed dates:** causes any dates which are changed during the refresh process to be highlighted. Once highlighted, it's possible to toggle the display on and off by checking or un-checking the Refresh Highlighting option on the Connections tab (Other section).
- **Reset Date Range based on changes:** Check this if the date range (start/end dates) of the Milestones chart should be changed to reflect the changes made during the refresh process.
- **Append Tasks:** Choose to add tasks to the presentation chart. Note that if a number of tasks have been added, re-importing is usually best.
- **Highlight obsolete milestones:** Symbols in the Milestones schedule which are no longer in the Microsoft Project file will change to a question mark symbol
- **Ignore Times When Refreshing:** Do not update the time when updating the date. Only change the date of the symbol.

Refresh example

In Milestones, Task 1's start symbol is tagged as "24,Start" because the matching task in Microsoft Project has the unique ID number 24. If Microsoft Project Task 1's start date changes, and the refresh feature is applied in Milestones, then the Task 1 start date will change to match the change in Microsoft Project.

Unique ID	Task Name	Start	Finish
24	Task 1	Fri 02/19/99	Wed 03/03/99
1	Task 2	Sat 03/06/99	Thu 03/25/99
2	Task 3	Mon 03/29/99	Wed 04/14/99
3	Task 4	Fri 04/16/99	Fri 04/30/99

Import a Microsoft Project schedule into Milestones...



..... to generate a presentation ready Milestones chart from the Microsoft Project dates.

Tag = 3,finish

Refresh a Previously Imported Project (Cont'd)

Which date fields are refreshable?

Project Field	Project Field	Project Field
Start [st]	Start 1, 2, ...start 10 [st1 ...st10]	Deadline [dl]
Finish [fn]	Finish 1, 2,....finish 10 [fn1 ...fn10]	Stop
Baseline Start [bs]	Baseline 1 start, Baseline 2 Start..... Baseline 10 Start [b1s ...b10s]	Created [cr]
Baseline Finish [bf]	Baseline 1 Finish, Baseline 2 FinishBaseline 10 Finish [b1f... b10f]	Resume [rs]
Actual Start [as]	Actual Finish [af]	Constraint Date [cd]
Early Start [es]	Early Finish [ef]	Date 1, Date 2,... Date 10 [dt1...dt10]
Late Start [ls]	Late Finish [lf]	

[abbreviations]—tag is limited to 30 total characters

Why won't all schedules refresh?

Some schedules are not able to be refreshed with the latest data from the Microsoft Project source file. The initial import wizard path determines if the schedule can or cannot be refreshed.

When refresh is not allowed, re-importing the Microsoft Project file is recommended.

The reasons for preventing refresh of selected schedules include: in some cases, refresh would not respect the initial import of selected tasks; refreshing the schedule would take significantly longer than re-importing.

Important Notes

- Time-scaled values found in ValueSets, among other schedule areas, will not be updated.
- Microsoft Project files that have significantly changed after the initial import into Milestones, should be re-imported for the latest Project data.
- Refreshing does not change the format of the Milestones schedule.
- Symbols in Milestones can be extensively rearranged (moved to various task lines).
- Symbols can be tagged manually by entering the Microsoft Project tasks' unique ID numbers, along with "start", "finish", or another refreshable date field in the Automation Tag field, as shown above.
- The tag is case sensitive.
- Manipulating the Microsoft Project file: Sorting a resource or task list does not change the Unique ID numbers in Microsoft Project. However, cutting and pasting task rows does change the Unique ID numbers, as Microsoft Project sees that as creating new task rows. Those same tasks in Milestones would, therefore, not be identified correctly when the Refresh is applied.