

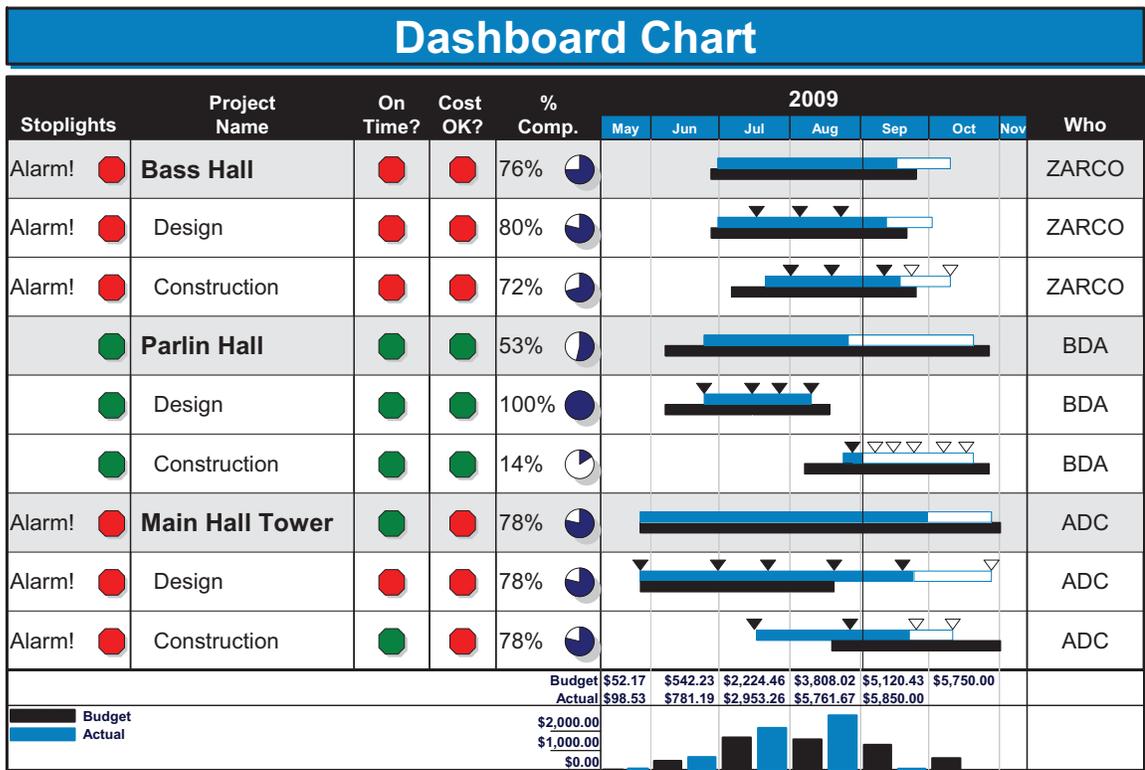
# MajorMilestones

From KIDASA Software – makers of Milestones Professional, Milestones Project Companion and Milestones Simplicity

## The Perfect Dashboard Chart

Like the old saying goes, "A picture is worth a thousand words". In project management, this concept can be extended to "A one page schedule is worth a thousand words".

Using familiar symbols and colors it's possible to show your audience at-a-glance how a project is doing. In "Dashboard Chart", below, a red stoplight is used to indicate that a project requires management intervention due to the project being behind schedule and/or over budget. Green indicates the project is both within budget and on schedule.



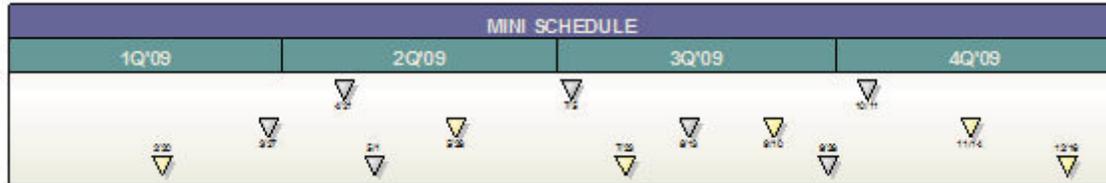
Download a free e-book. Visit [www.kidasa.com](http://www.kidasa.com).

- Successfully Presenting your projects
- Distribute and Share Schedules
- Create Presentation Reports for Microsoft Office Project
- Present Earned Value
- Stoptlights and Indicators

## Create a Milestones Mini

### Question:

How can I create a "mini" Milestones chart that can be pasted as is into a PowerPoint slide?



### Answer:

Milestones can create charts of any size!

To get you started:

**1) Minimize the Date Headings.** Click once on the date headings with the arrow tool. This will activate the Selection menu. In the Date Headings section, reduce the font size of all displayed date headings. (This example uses Arial size 8 font). Reduce the date headings to display quarterly instead of monthly.

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Task	Start	End	2009				% Comp.
			Q1	Q2	Q3	Q4	

**2) Legend.** No room for a legend in a mini chart! (You can add a floating legend later if it turns out you really do need one). For now, hide the legend by entering 0.0 by Enter Legend Height. Press Apply Legend Changes.

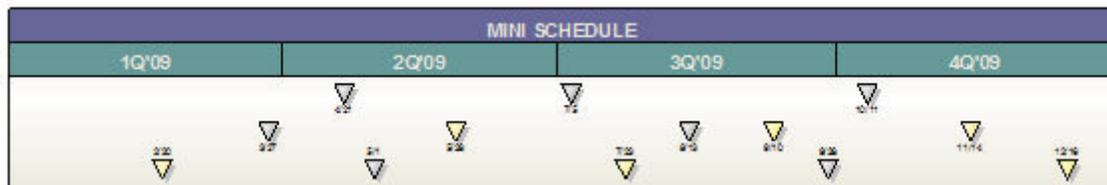


**3) Rows per Page.** In Layout | Page Size, reduce the amount (3 is a good example) next to Rows per Page: Press the Apply Setting Changes button.

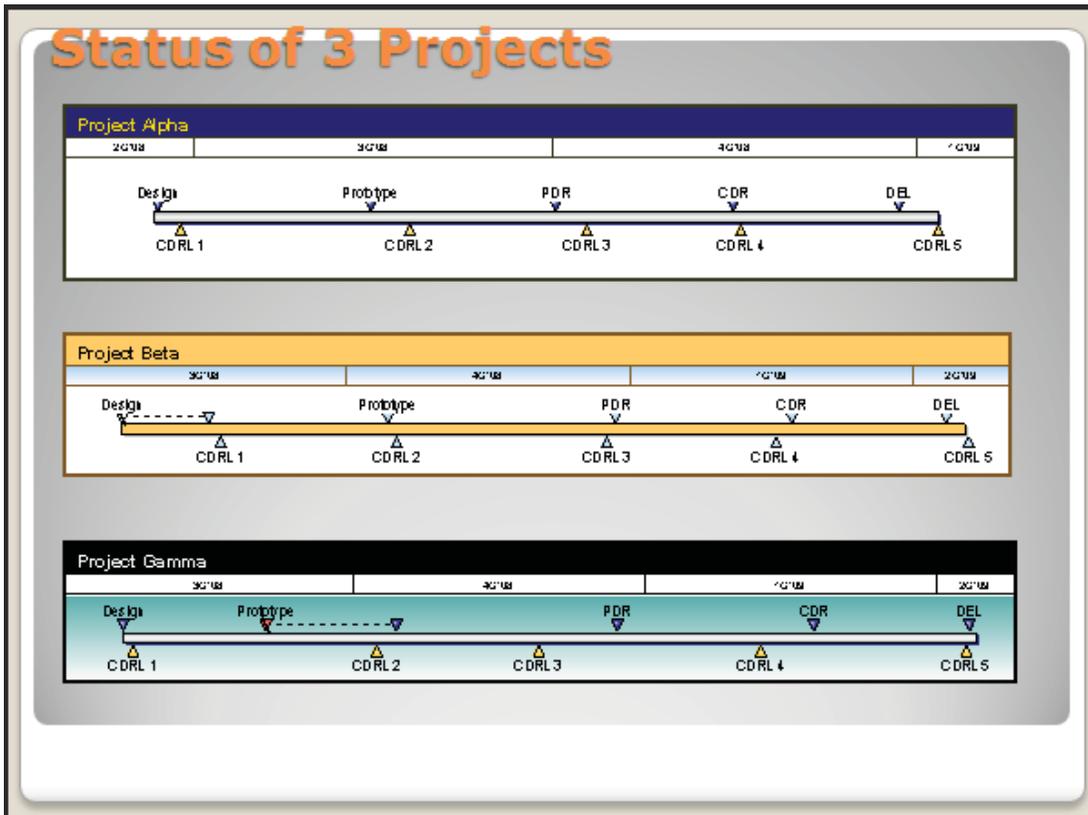
**4) Chart Size.** Change the Chart Size in Layout | Page Size next to Chart Size. For this example, Horizontal is 9.0, and Vertical is 2.0.

Task	Start	End	2009				% Comp.
			Q1	Q2	Q3	Q4	

**5) Format.** Hide or delete columns, apply a color theme, and change the appearance of the vertical and horizontal grid lines all on the Format tab of the enhanced toolbar. Add a custom heading by clicking once on the date headings and then choosing Selection | Edit Custom Headings. Add symbols from the toolbox and customize to fit the size of your small schedule. The result is a presentation-ready mini Milestones schedule!



This is what you might see in PowerPoint with 3 Milestones "Minis"



## Add a percent complete symbol in a column

### Question:

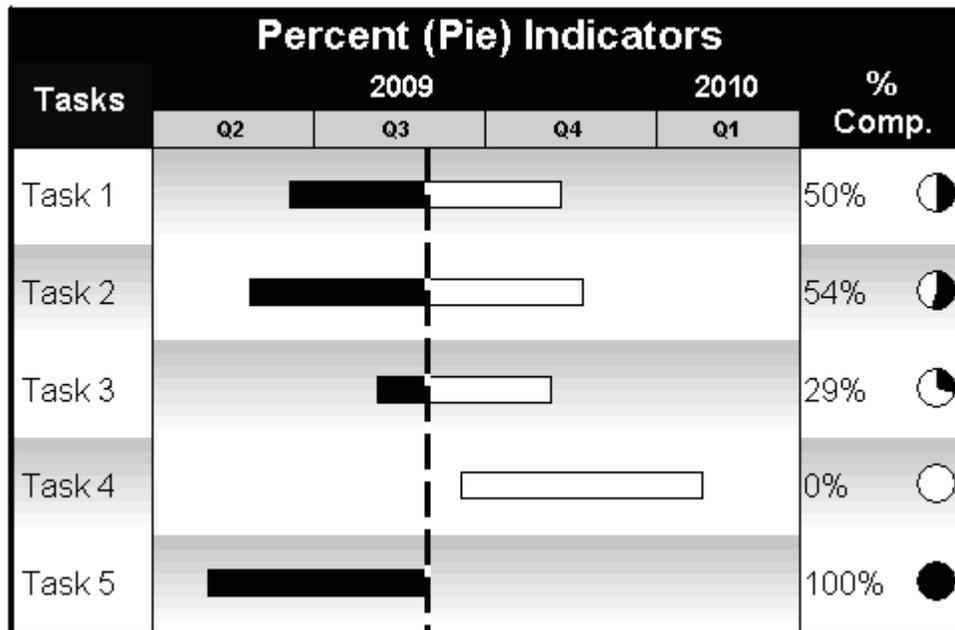
How do I add a percent complete symbol to a column?

### Answer:

1. Choose *Insert | Column | Percent Complete*.
2. Check *Include Percent Complete Symbol in column*, as shown below.



3. Choose a *Symbol Size*.
4. Choose left, right or center alignment for the symbol.
5. Click *OK*.



## Add Stoplights and Indicators to your schedule

### Question:

I want to add stoplights and other indicators to my schedules. I really don't want to read the manual. Is this possible?

### Answer:

#### Option 1 -

##### Use a built-in template or sample:

Choose File | Open | Standard Template | Stoplights (or File| Open | Sample Chart | Stoplights

You will find many stoplight schedule examples available at [www.kidasa.com](http://www.kidasa.com) (Choose Examples).

#### Option 2 -

**Build your own:** The Stoplight SmartColumn is very easy to format.

Stoplight and Status Indicators							
Tasks	2009			2010	Stoplight 1	Stoplight 2	Stoplight 3
	Q2	Q3	Q4	Q1			
Task 1	[Bar spanning Q2-Q3]				●	😊	✓
Task 2	[Bar spanning Q3-Q4]				●	😐	⚠
Task 3		[Bar spanning Q3-Q4]			●	😡	😊
Task 4			[Bar spanning Q4-Q1]		●	😊	↓
Task 5	[Bar spanning Q2-Q3]				●	😊	⊙

### To change a column to a stoplight column:

1. Right-click the column heading and choose properties.
2. Choose Stoplight for Column Definition.
3. Click the Properties Button.
4. Click the Numbers option under Standard Stoplights.

### To enter stoplights in a column once you have done the above:

1. Select the Text Tool.
2. Enter a 1 for ●, 2 for ●, 3 for ●, 4 for ●.

## Change a proposal schedule to have a fixed start date

### Question:

I see that it's possible to use numbers instead of dates for the time scale. This is great for contract proposals. When I finally have a starting date for my contract how do I get my date headings to adjust to the correct dates with the schedule I set up for the proposal?

### Answer:

You can use one of the date headings that has numbers (there is one for yearly, one for monthly, one for weekly, etc). If you want the number one to correspond with the particular start date you choose, you will need the date headings that do not cycle. For example, the monthly looks like 1,2,3...12,13; the daily looks like 1,2...30,31,32,33.

Quarterly: 1, 2, 3, 4, 5,	
Monthly: January, Febr	
Monthly: 1, 2, 3,... 12, 1	
Monthly: Jan'08, Feb'08	
Monthly: 1'08, 2'08,...	
Monthly: 1, 2, 3,... 12, 1	1
Weekly: 2, 9,... (Wk. S	1 2 3 4 5 6 7 8 9 10 11 12 13 14 15 16 17 18 19 20 21 22 23 24 25 26 27 28 29 30 31 32 33 34 35 36 37 38 39 40 41 42 43 44
Weekly: 2, 9,... (Wk. E	
Weekly: 1, 2, 3,... 52, 1	
Weekly: 1, 2, 3,... 52, 5	
Weekly: 1, 2, 3,... 52 (I	
Daily: 29, 30, 31,... 1, 2	
Daily: Sunday, Monday	
Daily: 1, 2,... 30, 31, 32, 3	
Daily: 1/1/08, 1/2/08...	
Daily: Sunday 1/1/08, M	

When you then go back and shift the starting date later, the numbers will shift in the date headings to correspond to the new starting date.

If you want to shift all of the dates on the schedule, including your task dates and symbols, you can use the "Shift all task dates" feature found in the Dates menu

## Customize Summary Bars

Question:

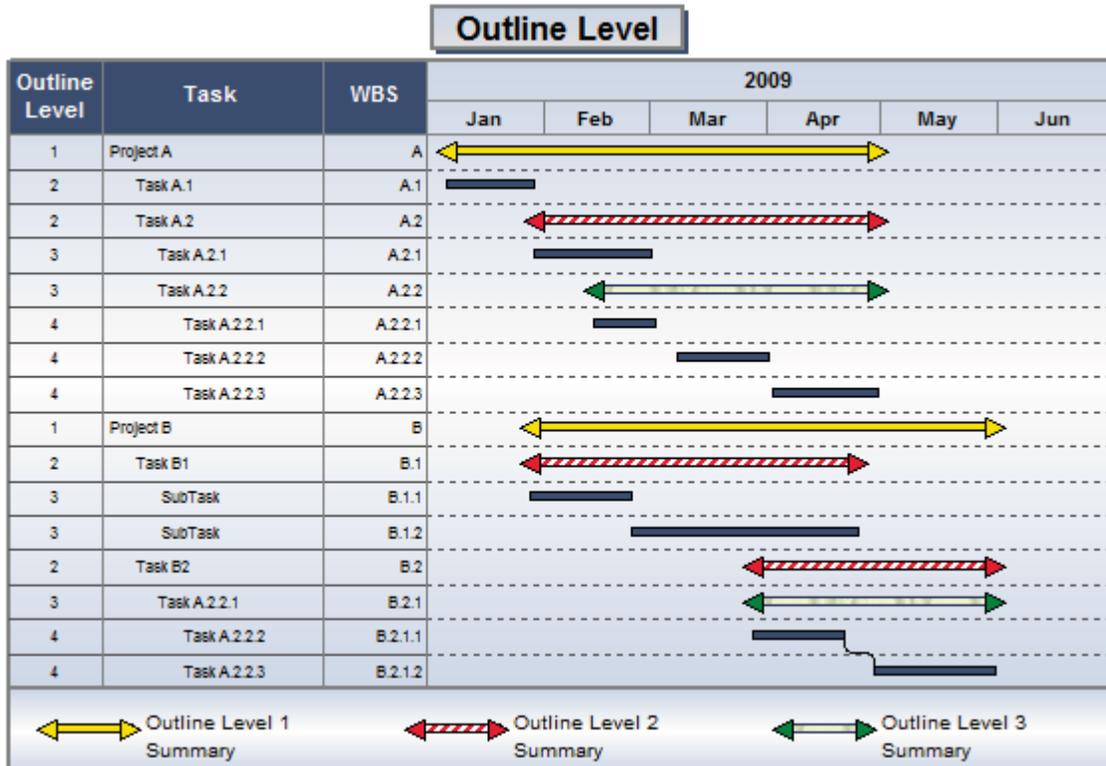
I would like to customize the shading and text for the summary bars and the lower level outline bars. How do I do this?

Answer:

Once you have outlined your schedule you have the option to customize the summary bar for each outline level.

1. On the **Format** tab choose Gridlines, Shading, Font Size.... The **Outline Level Properties** box appears.
2. In the box select the **Outline Level to customize**.
3. Next choose the **Summary Bars** tab and make your selections.
4. In the **Outline Level Properties** box make sure that **Automatically Apply Outline Level properties while editing schedule** is checked on.

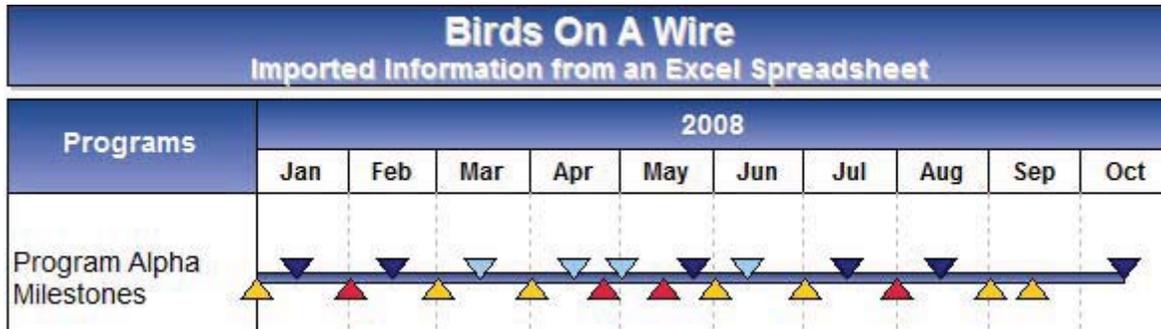
### EXAMPLE:



## Import a variety of dates for a single tasks

### Question:

I'd like to be able to import a variety of dates from Excel for a single task... it's how management likes to see serial events for a single line-item... they call the result Birds on-a-wire.



### Answer:

Through custom importing you can import a variety of information and dates from Excel or other spread sheet software into Milestones.

To learn more about custom importing and see how to generate the Birds On A Wire chart click here.

## Microsoft Project Import Wizard Custom Template

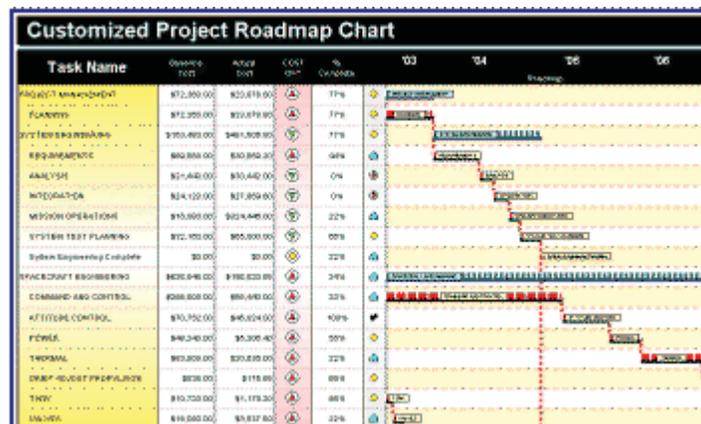
### Question:

I want to create a report from Microsoft Project and apply a standard template to it. What are the steps necessary to accomplish this?

### Answer:

The import wizard offers a set of templates from which to choose to bring your information in from Project. You can then format the chart and save the results as a custom project import template.

It is best to use a custom project import template with Microsoft Office Project importing as this will keep both importing and formatting information saved within the template. Complete information about custom project templates is provided here.



## Vertical Links to and from a Single Milestone Symbol

### Question 1:

Can a task have multiple predecessors/successors? If so, how many?

### Answer 1:

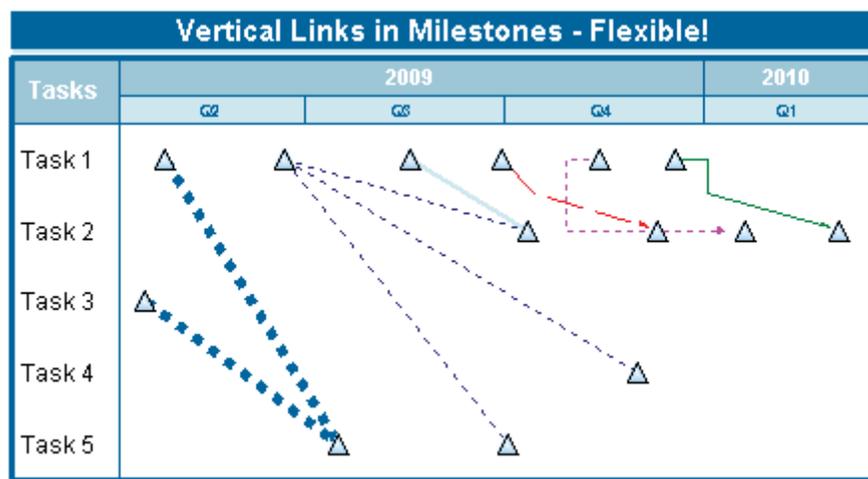
Yes, any number of vertical connectors can point to a single symbol.

### Question 2:

How many vertical links can start from a single symbol?

### Answer 2:

A single symbol can have at most 5 outgoing vertical connectors.



## Present a list of schedules

### Question:

How can I present a series of schedules that are not necessarily related in format?

### Answer:

When the Master Schedule and Presentation View are used in conjunction, the schedules in the Master Schedule are not merged together; they are all separate. Thus, each one has its own page and can be presented separately, one after the other.

Milestones Professional's presentation features are found under *View* | *Page View* | *Presentation View*.

## Autosave to protect files from crashes

### Question:

If my computer crashes or reboots while I'm saving or working on a Milestones schedule, how can I recover the schedule?

### Answer:

Milestones offers an **Autosave** feature. To turn on this option:

1. Choose the **Tools** tab



2. Choose **Files and Automation**.
3. Choose an option for **Autosaves Frequency**. (Default is None)



If you have **Autosave** turned on, you will be prompted to recover a file you were working on when the crash occurred. The **Autosave** feature must be activated before the crash.