Milestones PROFESSIONAL®

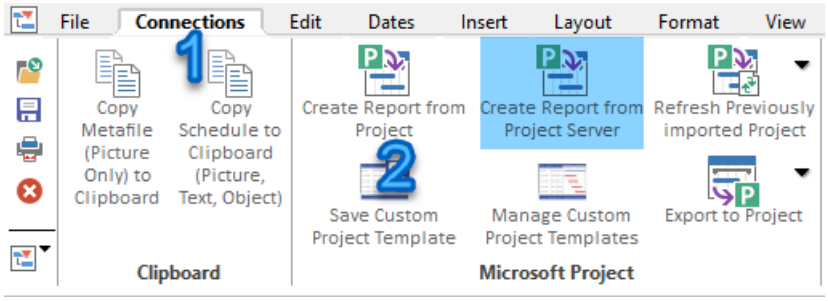
TUTORIALS

Lesson 16
Microsoft Project to Milestones Wizard
Microsoft Project Installed

In this lesson you will learn how to:

- Import a Microsoft Project MPP file into Milestones Professional using the Microsoft Project to Milestones Wizard
- Microsoft Project to Milestones Wizard
- Change the Microsoft Project MPP file and update ("refresh") the Milestones Professional schedule.

Import a Microsoft Project MPP file into Milestones Professional using the Microsoft Project to Milestones Wizard



For this tutorial the Microsoft Project file to be imported is on your desktop so choose ***Create Report from Project***. If you do not have Microsoft Project, go to Lesson 19.

Note: The Project to Milestones Wizard template options will be different based on whether Microsoft Project is installed or not installed on your computer.

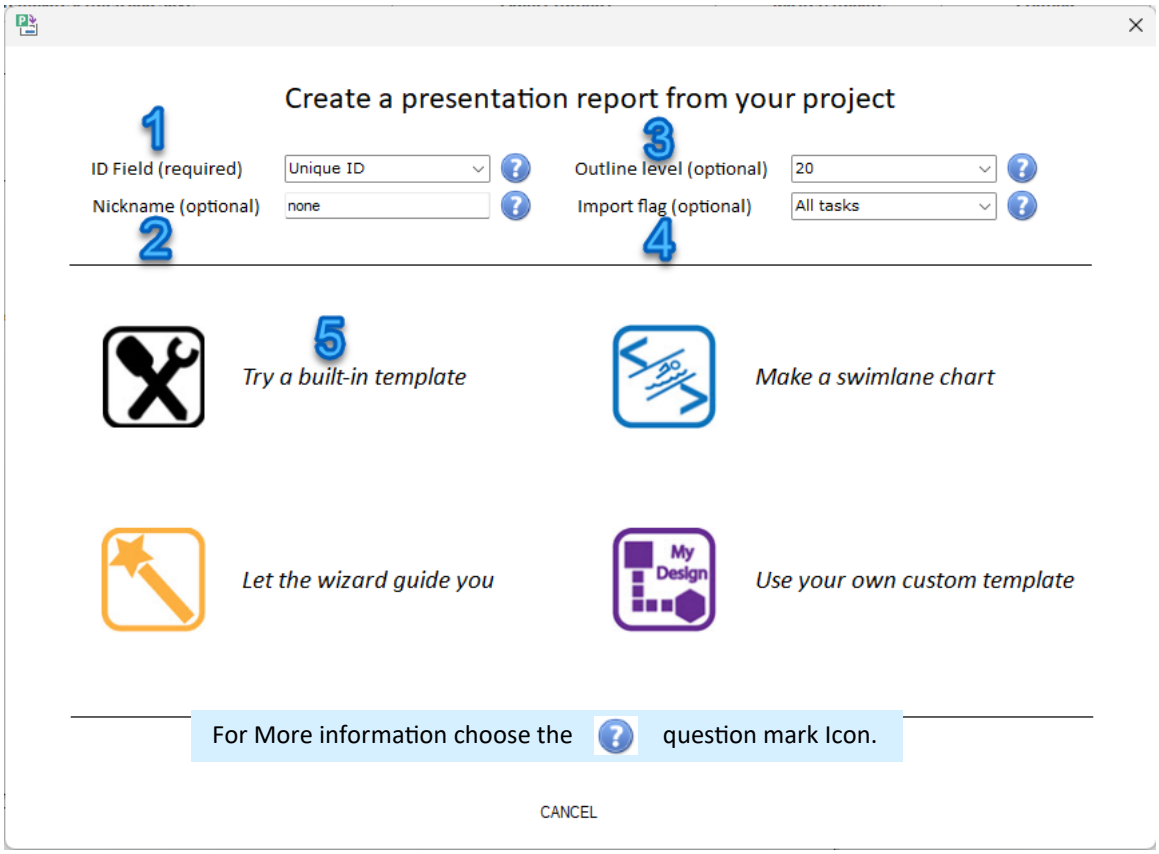
1. In Milestones Professional, choose the toolbar *Connections tab*.
2. In the Microsoft Project section choose *Create Report from Project*.

   If using Project Server or Project Online select ***Create Report from Project Server*** option. Project Server or Project Online needs to be active.

3. Navigate to Program Files\KIDASA\Milestones Professional 2025\Samples\Lessons folder. Select *MS Project File.mpp*. Choose *Open.* The Microsoft Project to Milestones Wizard will display.

Microsoft Project to Milestones Wizard

The Microsoft Project to Milestones Wizard has four import options. Try a built-in template: Select from predesigned templates that import specific date fields and column information from Microsoft Project into a Milestones schedule. Let the wizard guide you: Step by step selection of how you want your Microsoft Project information imported into a Milestones schedule. Make a swimlane chart: Import tasks into a swimlane by coding fields in Microsoft Project. Use your own custom template: Starting with a schedule imported using the wizard, modify it to your liking, then save it as a Custom Project Template.



1. For ID Field (required) , choose *Uniqueid*.

   Once a schedule is built it can be refreshed. In order for Milestones to connect to tasks in Microsoft Project it needs symbols and cells to be tagged with unique identifiers. Best practice is to use the Microsoft Project Unique ID field for the unique identifier.

2. Leave Nickname (optional) blank.

   Nickname (optional) - If you are going to combine 2 or more Milestones imported schedules that were generated from different Microsoft Project files use the nickname field. Give a nickname to each Microsoft Project file, enter it in the nickname field. During import it will be applied to each symbol and cell along with the Unique ID.

3. For Outline level (optional) choose *20*.

   Outline level brings information from that level and below.

4. Import Flag (optional) choose *all tasks*.

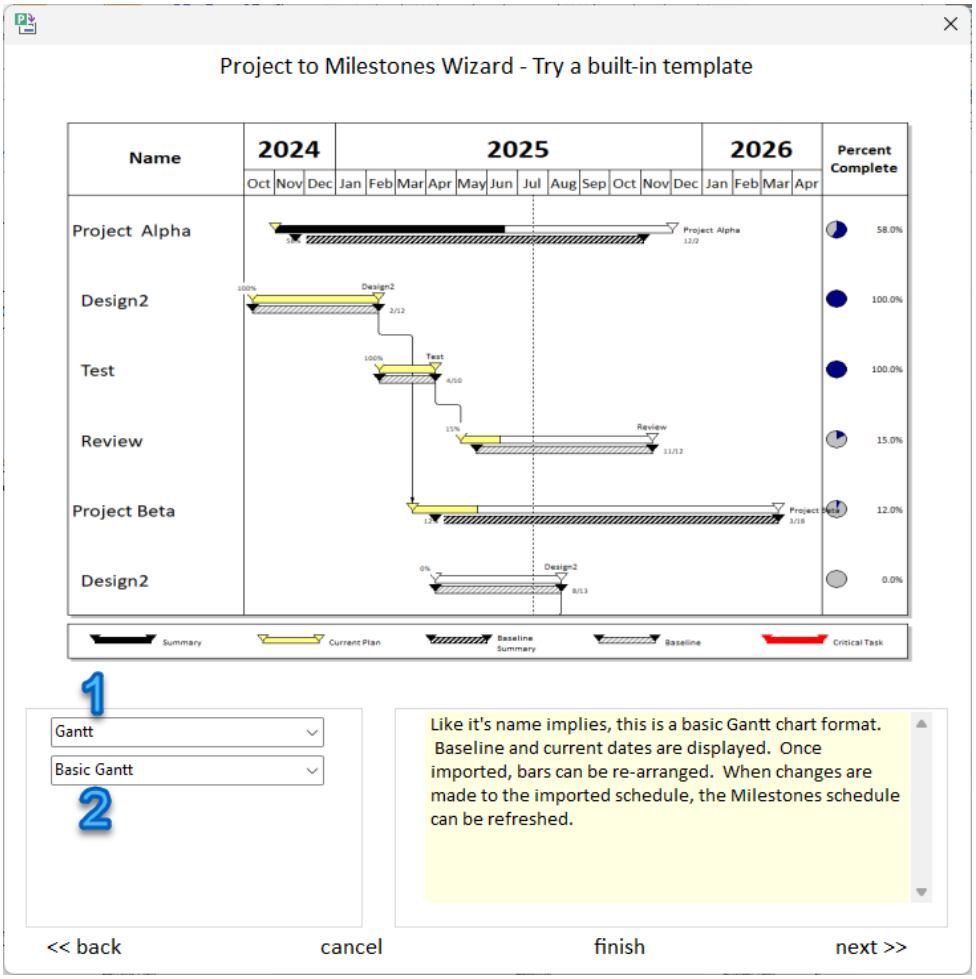
   There are several options to limit the Microsoft Project information. 1) In Microsoft Project, filter the schedule save it prior to importing. 2) In the wizard pick an **Outline Level** or 3) In the wizard select a Microsoft Project **Flag** field that you previously set up in the Microsoft Project file.

5. Pick *Try a built-in template*. The Project to Milestones Wizard - Pick a built-in template dialog displays.

Microsoft Project to Milestones Wizard (continued)

Try a built-in template dialog

The Built in template option has 8 categories: Top Templates, Gantt, Stoplight, Milestone, Summary, Earned Value, Status and Dashboard, from which to choose. Each Category has a variety of chart types. As the category and type are selected the wizard displays a picture of the selection.

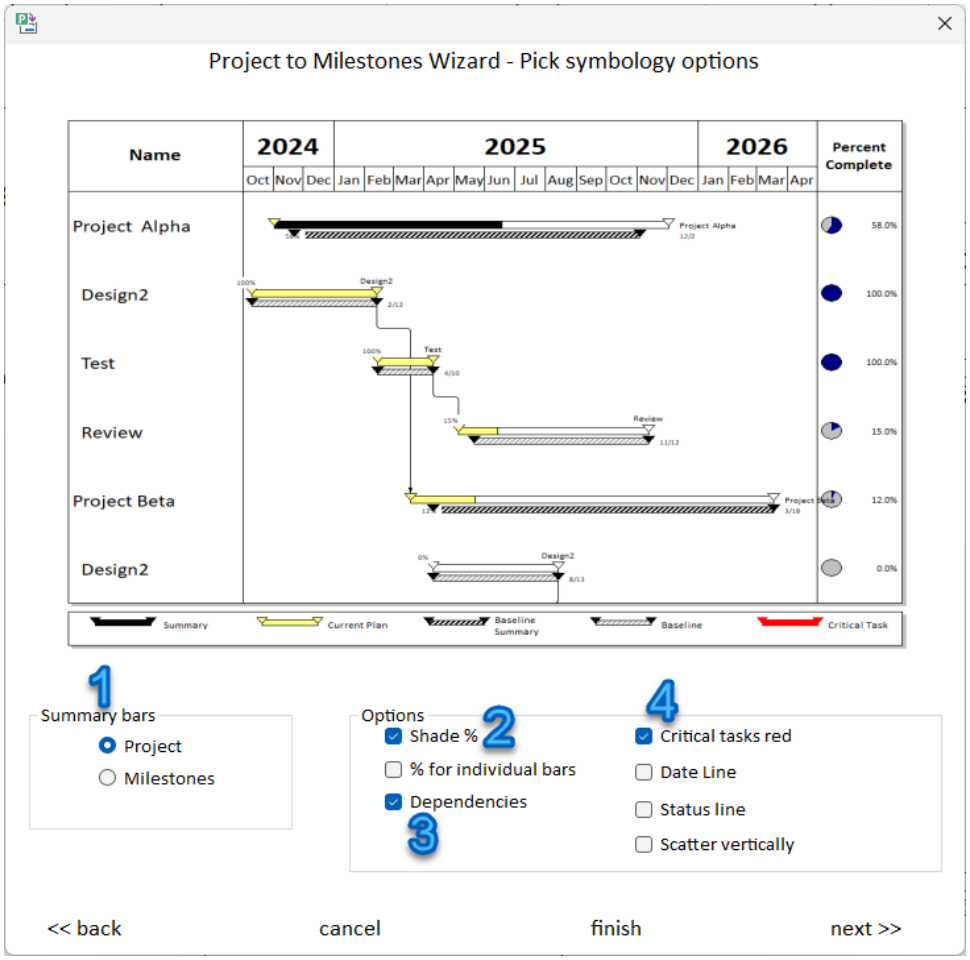


Make the following selections:

1. Choose *Gantt*.
2. Choose *Basic Gantt*.
3. Choose *Next*. The Project to Milestones Wizard - Pick symbology options dialog displays.

Microsoft Project to Milestones Wizard (continued)

Pick symbology options dialog



Make the following selections:

1. For Summary Bars choose *Project*.

   Summary information will be drawn from Microsoft Project information. If **Milestones** is selected the summary bars displayed are reflections of the lower level tasks and can only be changed by moving the lower level tasks.

2. ☑*Shade % complete* - Symbols and horizontal bars color based on the percent complete of the task.

   Set % for individual bars should be selected when multiple tasks are placed on a single Milestones task row.

3. ☑*Dependencies* - Dependent symbols (successors) will be linked with vertical links.

   Select this option to have all Microsoft Project tasks marked as critical color red in the generated Milestone schedule.

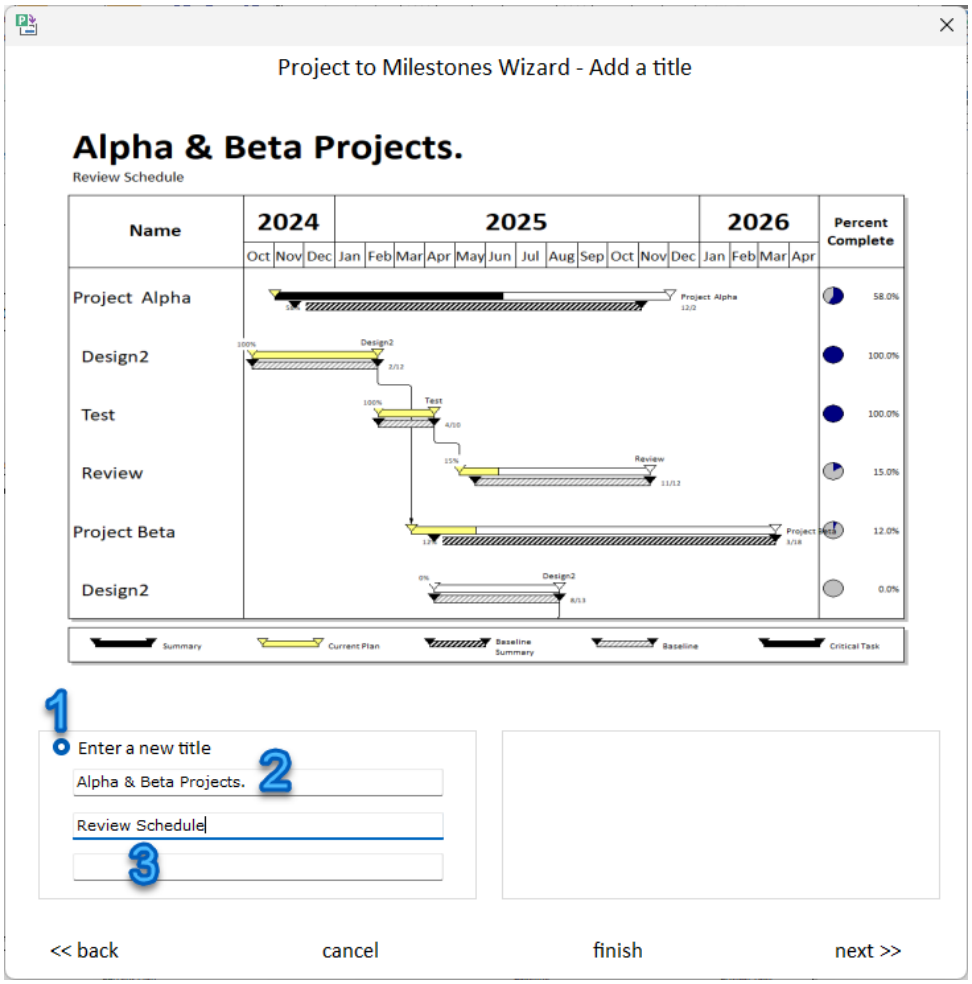
4. ☑*Critical tasks red.*

5. Choose *Next*.

The Project to Milestones Wizard - Add a title dialog displays

Microsoft Project to Milestones Wizard (continued)

Add a title dialog



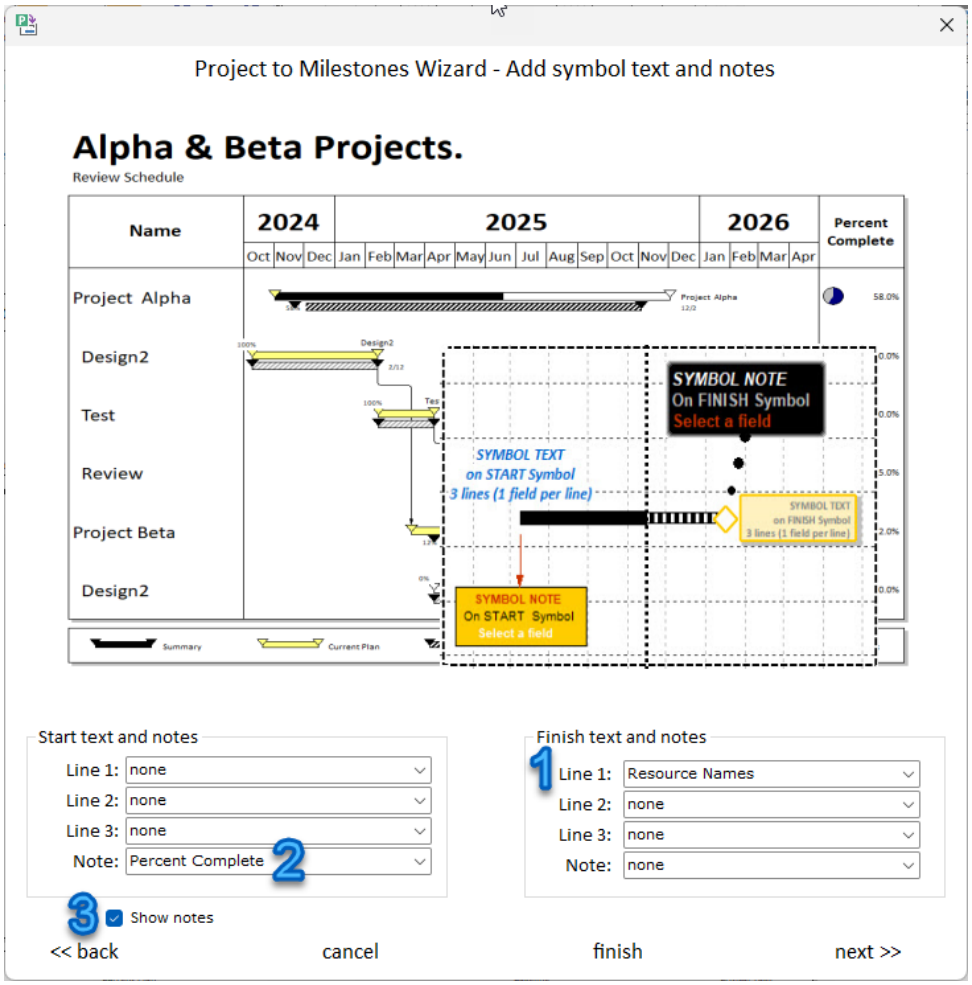
Make the following selections:

1. Select *Enter a new title*.
2. In the first blank section (this will be line 1 of the schedule's title), type in *Alpha & Beta Projects*.
3. In the second blank section, (this will be line 2 of the schedule's title), type in *Review Schedule*.
4. Choose *Next*.
5. The Project to Milestones Wizard - Add symbol text and notes dialog displays.

Microsoft Project to Milestones Wizard (continued)

Add symbol text and notes dialog

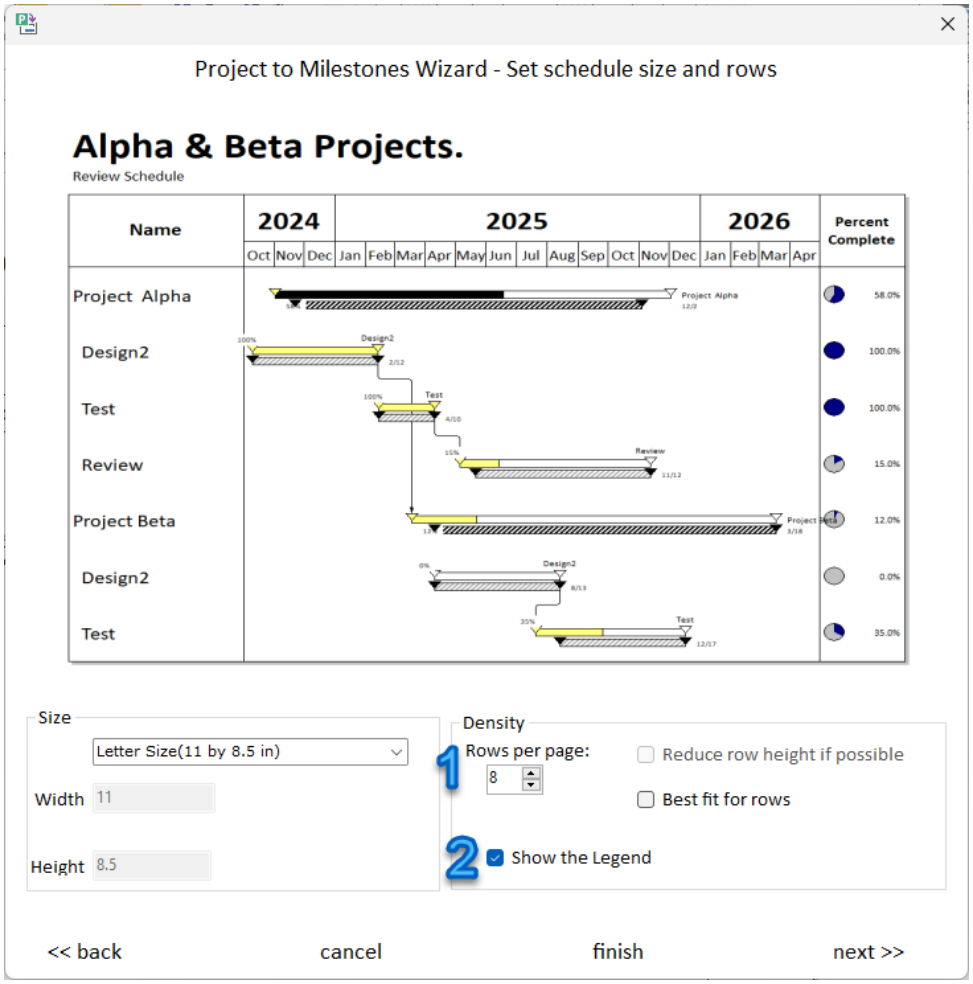
Make the following selections:



1. Under Finish symbol text - Line 1: choose *Resource Names* from the drop down list. The task's resource names will populate as symbol text for the finish symbol. The placement of the text to the symbol is based on the symbol's settings in the Milestones schedule's toolbox.
2. Under Start symbol note choose *Percent Complete* from the drop down list . The % complete for the Microsoft Project task will populate as a symbol note for the start symbol.
3. ☑ *Show notes on schedule*, to have the note display near the start symbol. Once the schedule is imported, the note can be dragged anywhere on the schedule and is still attached to its symbol.
4. Choose *Next*. The Project to Milestones Wizard - Layout options dialog displays.

Microsoft Project to Milestones Wizard (continued)

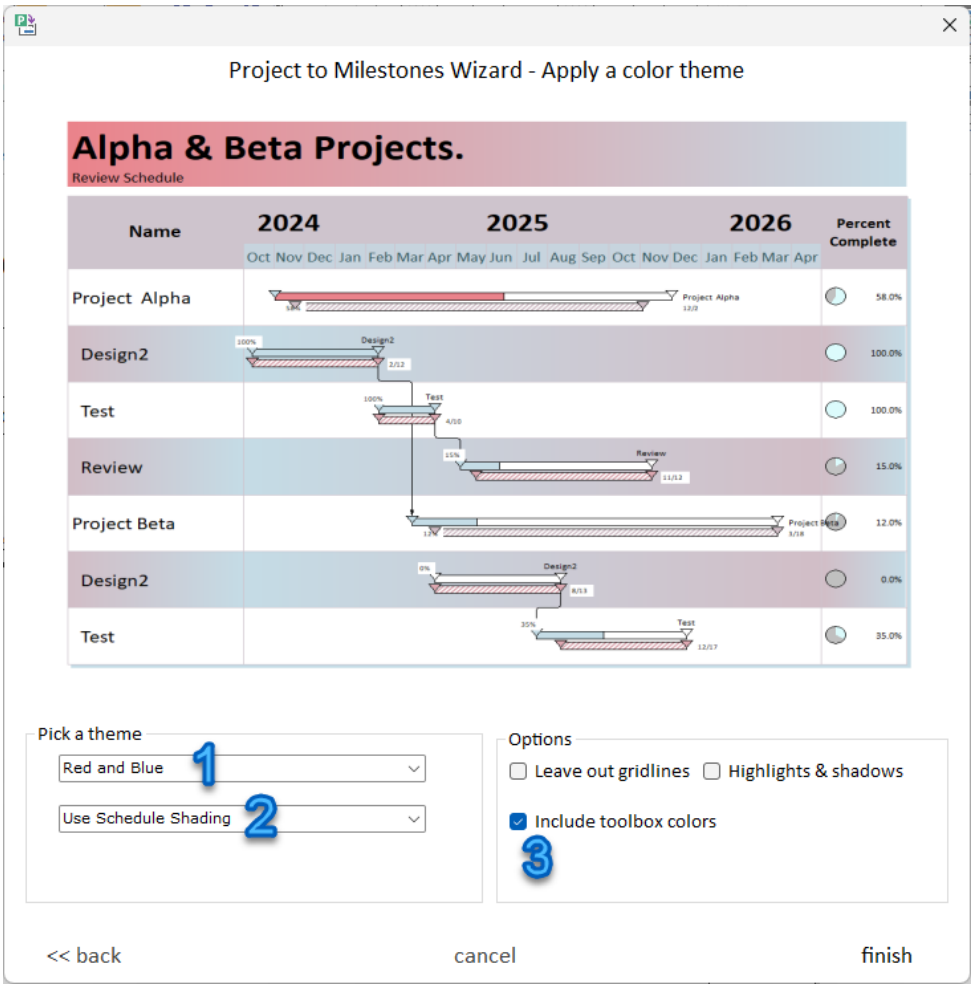
Set schedule size and rows dialog



1. For Rows per page choose *8*.
2. ☑ *Show the Legend*.
3. Choose *Next*. The Project to Milestones Wizard - Apply a color theme dialog displays.

Microsoft Project to Milestones Wizard (continued)

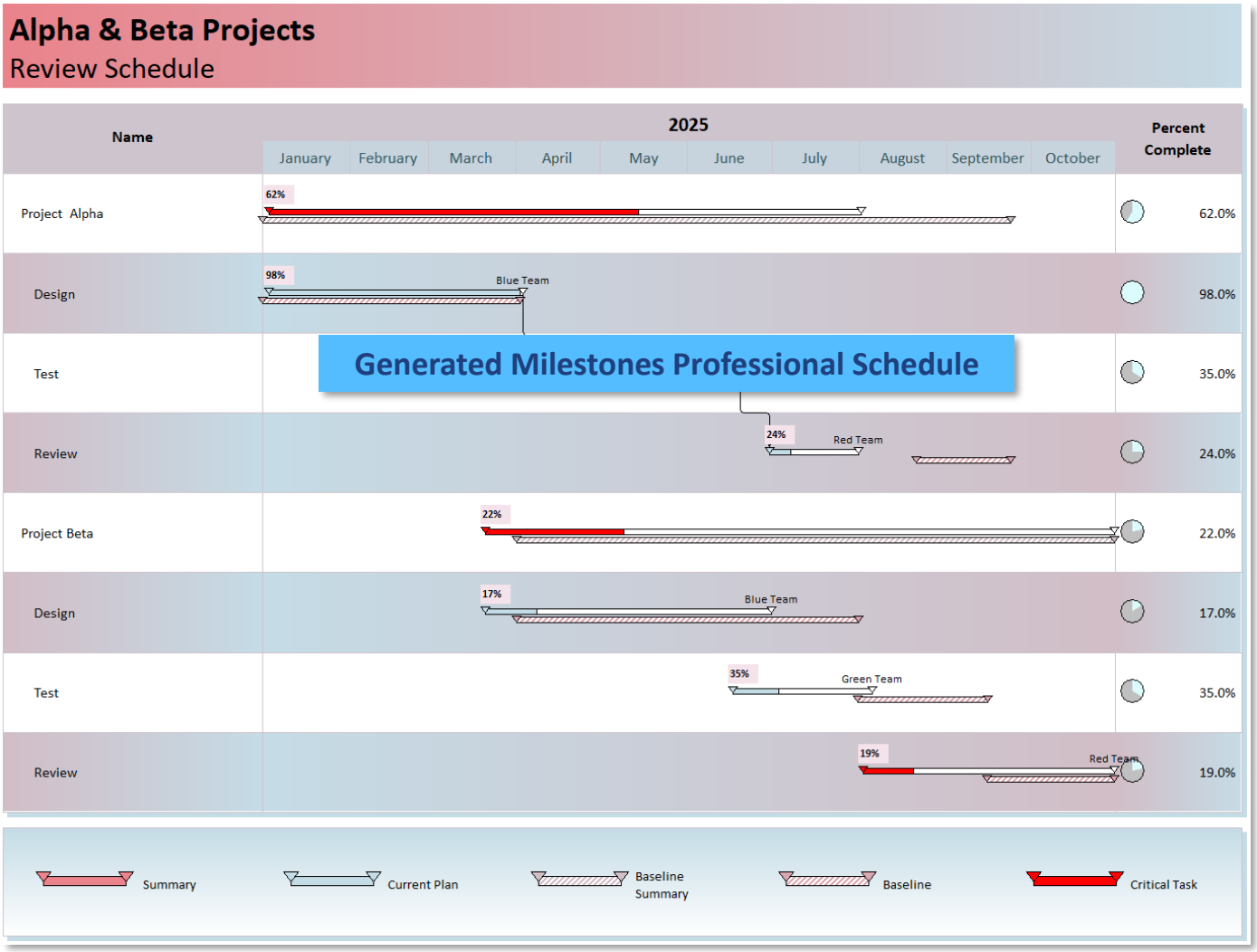
Apply a color theme dialog



1. Under Apply a color theme choose *Red and Blue*.
2. Choose *Use ScheduleShading*.
3. ☑ *Include toolbox colors*.
4. Choose *Finish*. Milestones will now generate the schedule found on the following page.
5. Save file as *Alpha & Beta Projects*. Do not close the file.

Microsoft Project to Milestones Wizard (continued)

Result



Refresh the Milestones Professional schedule when the Microsoft Project file has changed

The changed Microsoft Project file

The following changes were made to the MS Project File.mpp and renamed MS Project File Changed.mpp

Unique ID	Task Name	Duration	Start	Finish	Baseline Start	Baseline Finish	% Complete
1	**Project Alpha**	**151 days**	**Fri 01/03/25**	**Fri 08/01/25**	**Wed 01/01/25**	**Tue 09/23/25**	**62%**
2	Design	65 days	Fri 01/03/25	Thu 04/03/25	Wed 01/01/25	Wed 04/02/25	98%
3	Test	55 days	Fri 04/04/25	Thu 06/19/25	Wed 04/02/25	Mon 07/21/25	35%
4	Review	24 days	Mon 06/30/25	Thu 07/31/25	Thu 08/21/25	Tue 09/23/25	24%
5	**Project Beta**	**160 days**	**Fri 03/21/25**	**Thu 10/30/25**	**Tue 04/01/25**	**Thu 10/30/25**	**22%**
6	Design	54 days	Fri 03/21/25	Mon 06/30/25	Tue 04/01/25	Thu 07/31/25	17%
7	Test	36 days	Tue 06/17/25	Tue 08/05/25	Thu 07/31/25	Mon 09/15/25	35%
8	Review	65 days	Sat 08/02/25	Thu 10/30/25	Mon 09/15/25	Thu 10/30/25	19%

Unique ID	Task Name	Duration	Start	Finish	Baseline Start	Baseline Finish	% Complete
1	**Project Alpha**	**151 days**	**Fri 01/03/25**	**Fri 08/01/25**	**Wed 01/01/25**	**Tue 09/23/25**	**62%**
2	Design	65 days	Fri 01/03/25	Thu 04/03/25	Wed 01/01/25	Wed 04/02/25	98%
3	Test	55 days	Fri 04/04/25	Thu 06/19/25	Wed 04/02/25	Mon 07/21/25	35%
4	Review	24 days	Mon 06/30/25	Thu 07/31/25	Thu 08/21/25	Tue 09/23/25	24%
5	**Project Beta**	**160 days**	**Fri 03/21/25**	**Thu 10/30/25**	**Tue 04/01/25**	**Thu 10/30/25**	**17%**
6	Design	76 days	Fri 03/21/25	Wed 07/30/25	Tue 04/01/25	Thu 07/31/25	12%
7	Test	57 days	Tue 06/17/25	Wed 09/03/25	Thu 07/31/25	Mon 09/15/25	22%
8	Review	65 days	Sat 08/02/25	Thu 10/30/25	Mon 09/15/25	Thu 10/30/25	19%

Project Beta tasks:

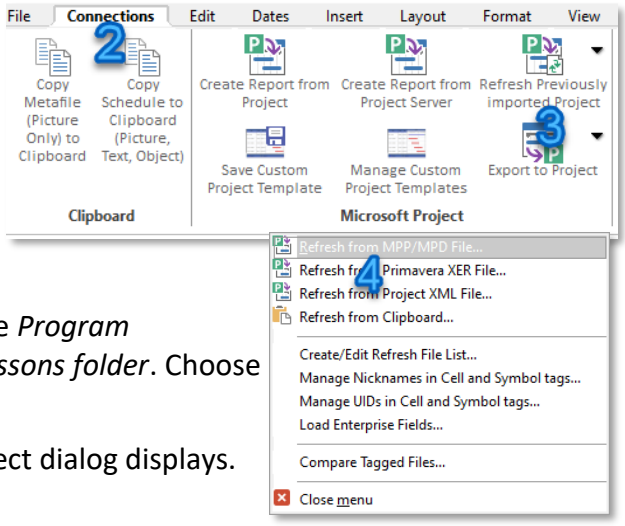
1. Design *Finish Date* changed from 6/30/25 to *7/30/25*. Because of this change the following other items changed
    - Design *% Complete* changed from 17% to *12%*.
2. Test *Finish Date* changed from 8/05/25 to *9/03/25*. Because of this change the following other items changed
    - Design *% Complete* changed from 35% to *22%*.

Because of the above changes the following items in Project Beta summary changed

Project Beta *% Complete* changed from 22% to *17%*.

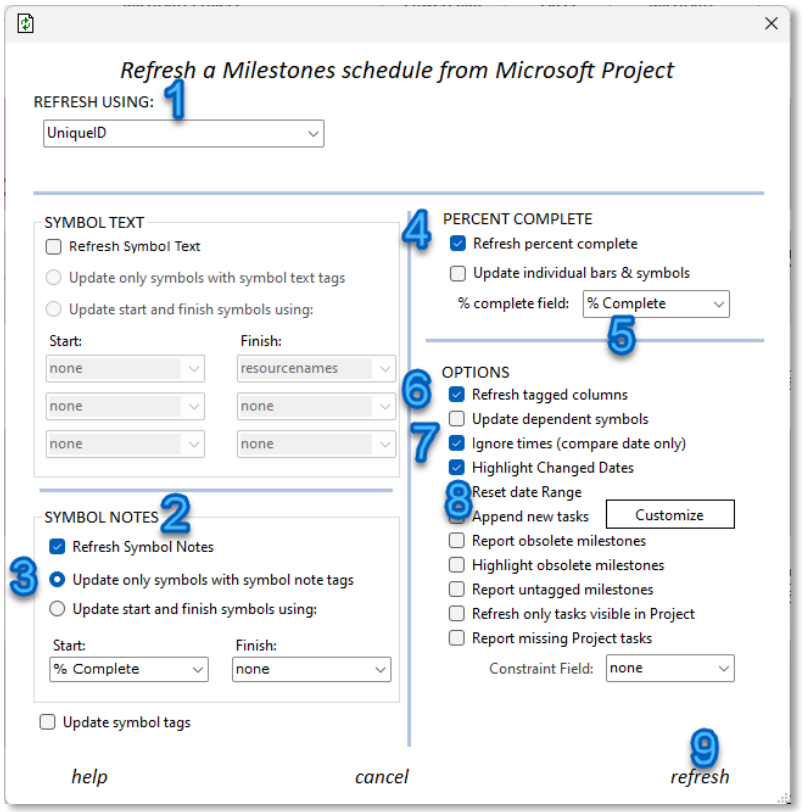
Refresh the Milestones Professional schedule when the Microsoft Project file has changed (continued)

1. Go back to the Milestones Professional *Alpha & Beta Projects.mlq* schedule. It should still be opened. If not open it.
2. Choose the toolbar *Connections tab*.
3. In the Microsoft Project section choose *Refresh Previously imported Project*.
4. From the drop down choose *Refresh from MPP/MPD File*… The Select the Schedule to Open dialog box displays.
5. Select *MS Project File Changed.mpp* by navigating to the *Program Files\KIDASA\Milestones Professional 2025\Samples\Lessons folder*. Choose *Open*.
6. The Refresh a Milestones schedule from Microsoft Project dialog displays.



Refresh the Milestones Professional schedule when the Microsoft Project file has changed (continued)

Choose Refresh Options



1. For *REFRESH USING* : select *UniqueID*.
2. Under *SYMBOL NOTES* ☑ *Refresh Symbol Notes*.
3. Under *SYMBOL NOTES* ☑*Update only symbols with symbol note tags*.
4. Under *PERCENT COMPLETE* ☑ *Refresh percent complete*.
5. Under *PERCENT COMPLETE* for the % complete field choose *% Complete.* This is necessary to have the fill to status of the symbols and horizontal bars update.
6. Under *OPTIONS* ☑ *Refresh tagged columns*. To have the information in the Percent Complete column update based on the changes in the Microsoft Project file.
7. Under *OPTIONS* ☑ *Ignore times*. Only the date of a task will be considered when the file is updated.
8. Under *OPTIONS* ☑ *Highlight Changed Dates*. To have any Baseline and Normal symbols that update highlight in orange.
9. Choose *refresh*. The schedule will be generated.

See the next page to view the Refreshed Milestones Professional schedule.

Refresh the Milestones Professional schedule when the Microsoft Project file has changed (continued)

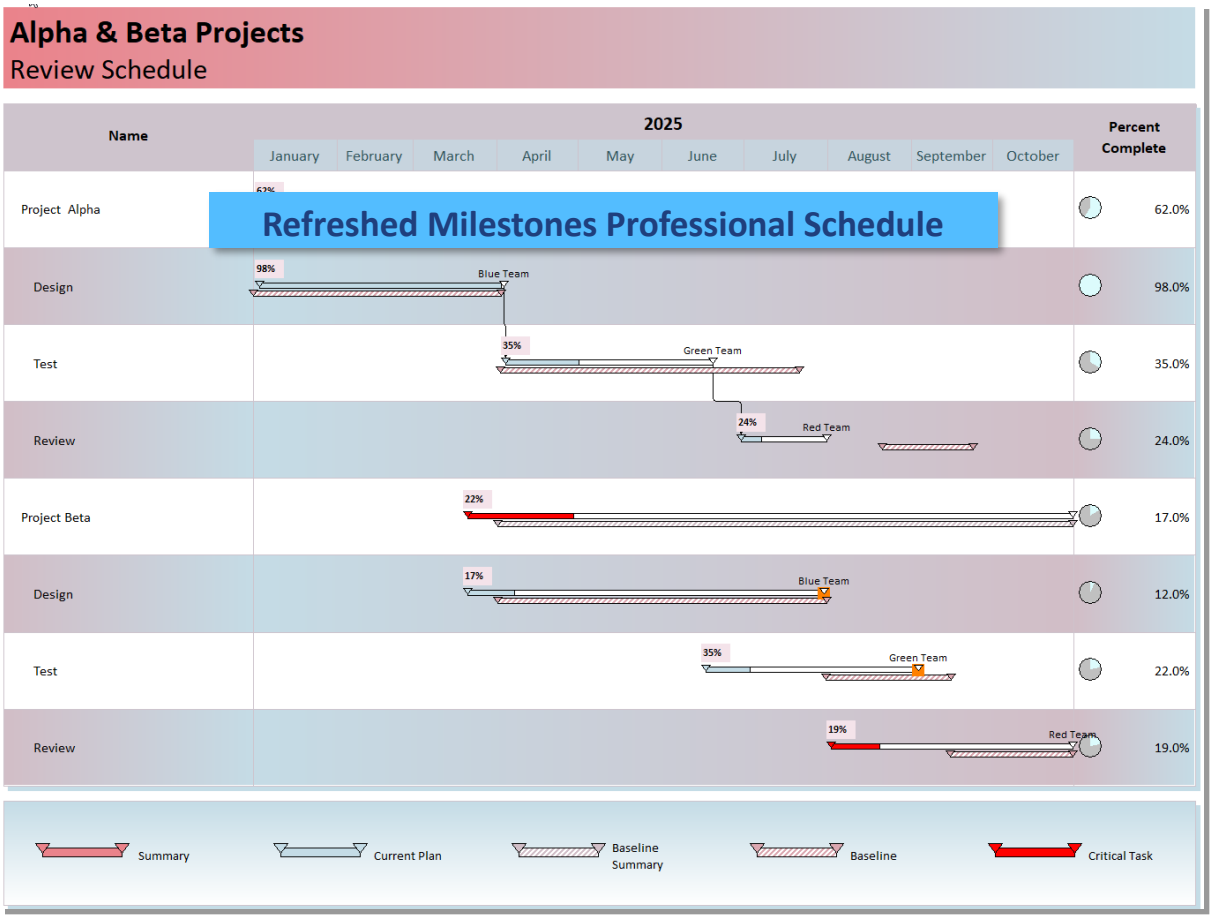
Result

Changed symbols are highlighted in orange.

Because the finish dates were changed some column and symbol text percent complete also changed.

To turn off or change the color of the orange highlighting choose the *Connections* tab in the *Other* section uncheck *Refresh Highlighting* or change *Color.*

Highlighting does not save when the file is saved.



Refresh also generates a report showing the changes.

The report can be printed.

