Milestones PROFESSIONAL® TUTORIALS

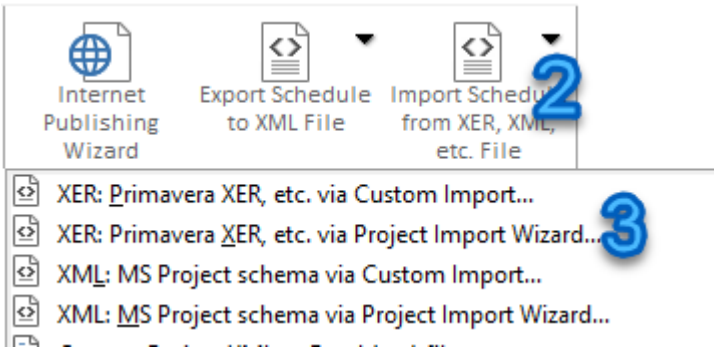
Lesson 18
Import and Refresh from Oracle Primavera

In this lesson you will learn how to:

- **Import Primavera information into Milestones Professional using a XER file.**
- **Customize the imported schedule**
- **Save as a Custom Project Template.**
- **Import Primavera XER Files using the Use Your Own Custom Template Option**
- **Update ("refresh") the Milestones Professional schedule from a changed schedule.**

Import a Primavera XER File.

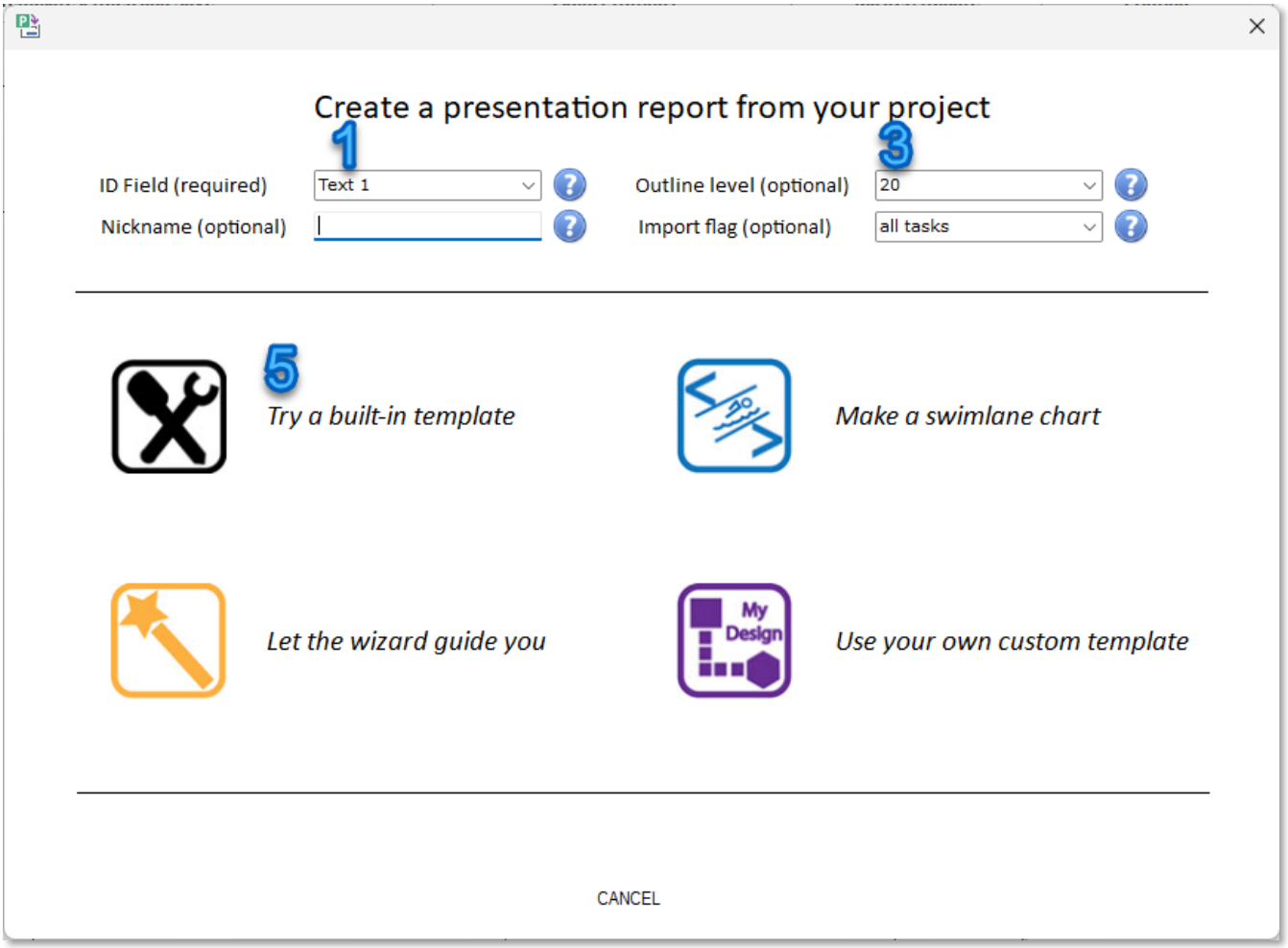
1. In Milestones Professional, choose the *Connections* tab.
2. In the Other section choose *Import Schedule from XER, XML etc. File.*
3. Select *XER:Primavera XER, etc. Project Import Wizard...* The Import Primavera Xer, XML, and Other File Types dialog displays.
4. Select *Browse*
5. In the Select the File to Import dialog, navigate to Program Files\KIDASA\Milestones Professional 2025\Samples\Lessons folder. Select *Primavera Nano.xer.*
6. Choose *Continue*. The Select Project to Import dialog displays.
7. Select the first Project *3869-PROD00914*.



The first window of the Project to Milestones Wizard displays.

Project to Milestones Wizard

The Project to Milestones Wizard has four import options, three of which can be used with an XER file. 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 (A wizard guides you through many choices.) Use your own custom template: (Pick a template you previously created and saved.)



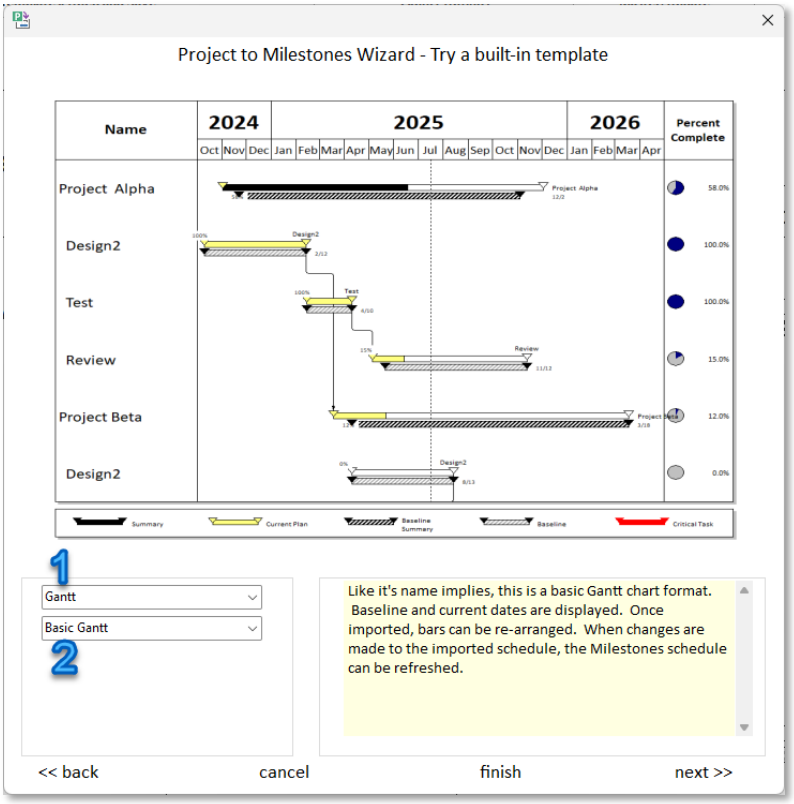
1. For ID Field (required), choose *Text 1*.
2. Nickname is currently not available for XER files.
3. For Outline level (optional), choose *20*.
4. Import Flag is not available for XER files.
5. Choose *Try a built-in template*.
6. The Project to Milestones Wizard - Try a built-in template dialog displays.

Project to Milestones Wizard (continued)

Project to Milestones Wizard - Try a built-in template dialog

Try a Built-in template option has 8 categories to choose from. Each Category has a variety of chart types. As the category and type are selected the wizard displays a picture of the selection.

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



Project to Milestones Wizard - Pick symbology options dialog

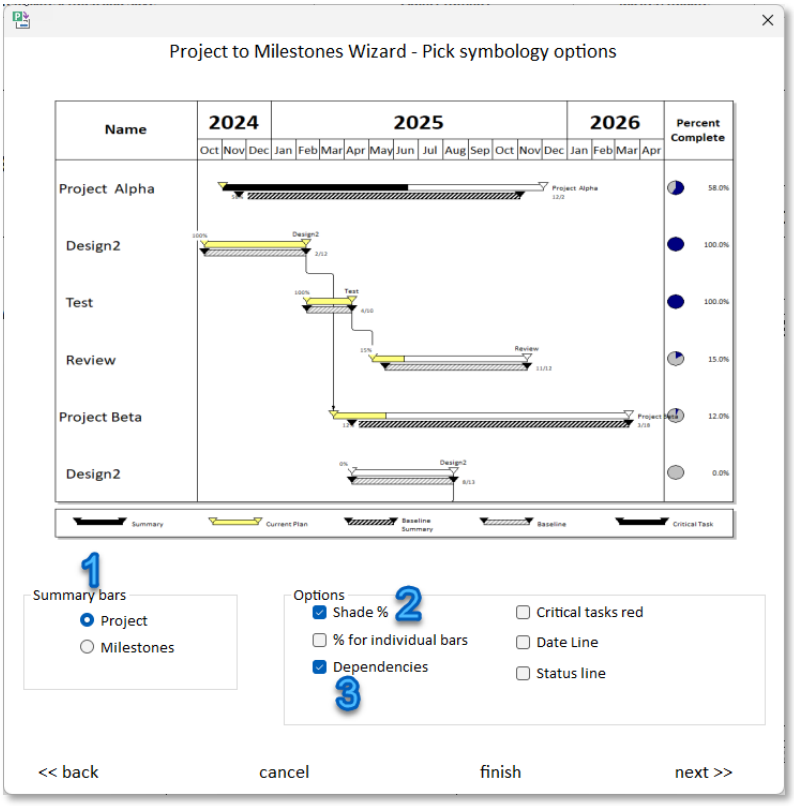
1. For Summary Bars choose *Project*.

   When **Project** is selected, summary information will be drawn from Primavera dates. 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 will color based on the percent complete of the task.

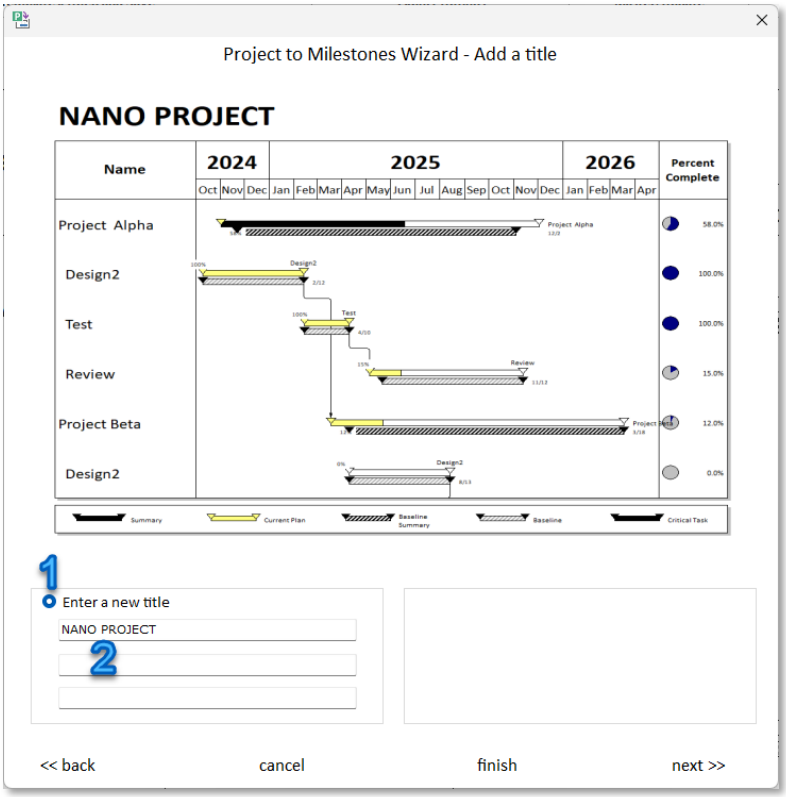
   Set % for individual bars should be selected when multiple tasks are placed on a single Milestones task row.

3. ☑*Show Dependencies* - Dependent symbols (successors) will be linked with vertical links.
4. Choose *next*. The Project to Milestones Wizard - Title dialog displays.



Project to Milestones Wizard - Add a Title dialog

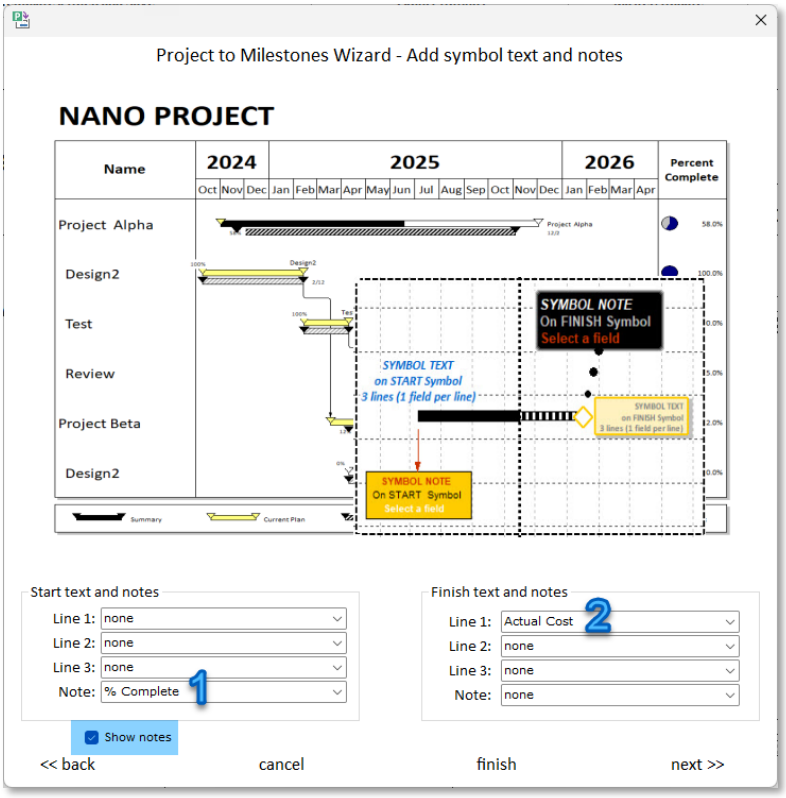
1. Select *Enter a new title*.
2. In the first blank section (this will be line 1 of the schedule's title), type in *Nano Project* .
3. Choose *next*.
4. The Project to Milestones Wizard - Add symbol text and notes dialog displays.



The Project to Milestones Wizard - Add symbol text and notes dialog

1. Under Start text and notes next to Note: choose *%complete* from the drop down list. The % complete value for the task in the Primavera file the value will populate as a symbol note on the start symbol.
   All other choices should say *none*.
2. Under Finish text and notes next to Line 1: choose *Actual Cost* from the drop down list. If a Cost is associated with a task in the Primavera file the value 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.
   All other choices should say *none*.

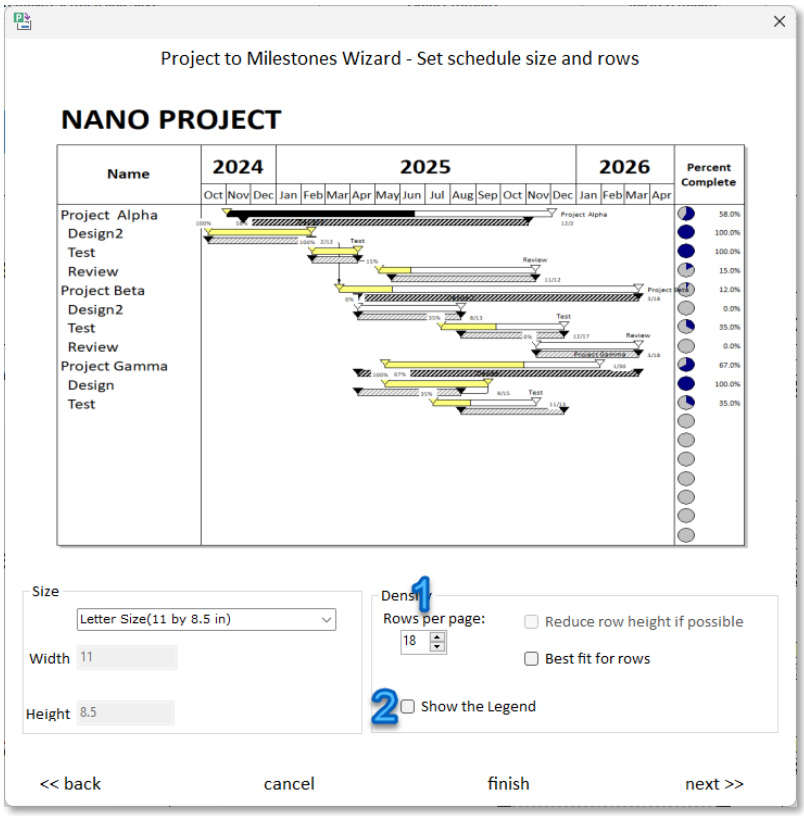
> Symbol notes can be hidden or shown. ☑*Show notes on schedule* to have the note display near the start symbol. (Once the schedule is imported, the note can be dragged anywhere on the schedule and is still attached to its symbol.)



3. Choose *next*.
4. The Project to Milestones Wizard - Set schedule size and rows dialog displays.

The Project to Milestones Wizard - Set schedule size and rows dialog

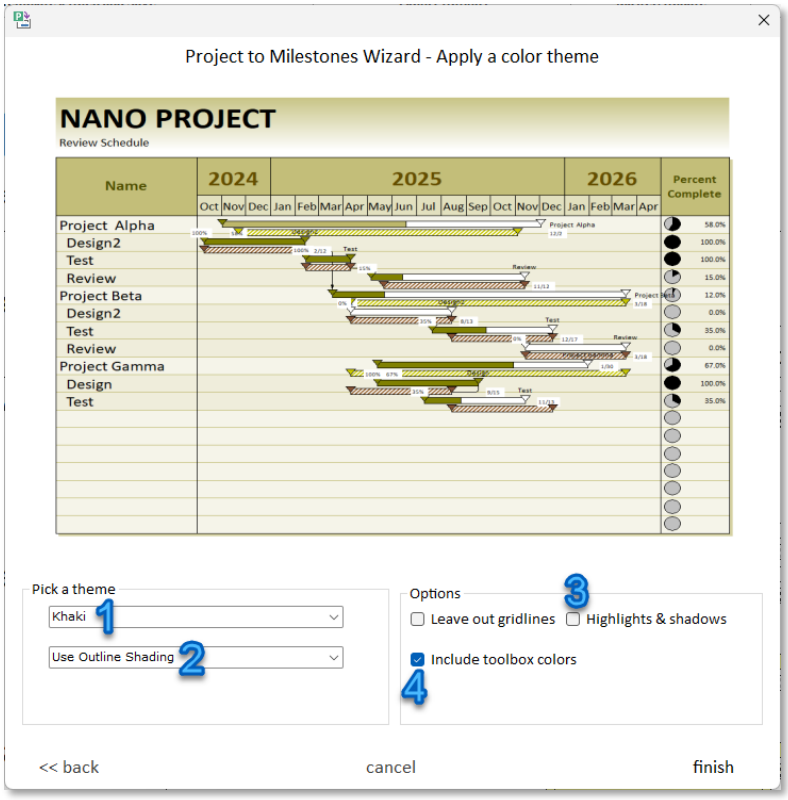
1. For Rows per page choose *18*.
2. Uncheck *Show the Legend*.
3. Choose *next*.
4. The Project to Milestones Wizard - Apply a color theme dialog displays.



The Project to Milestones Wizard - Apply a color theme dialog

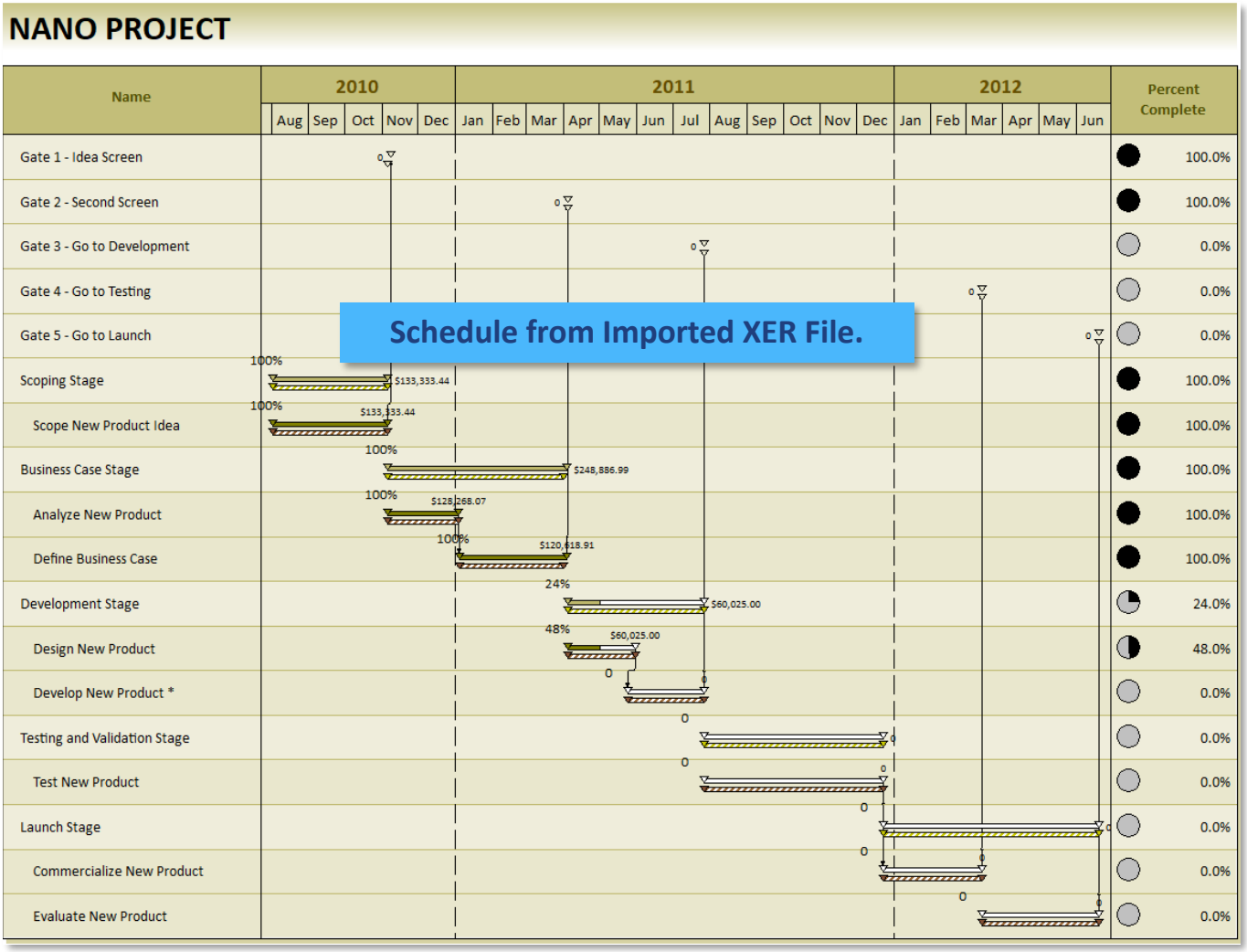
1. Under Apply a color theme choose the theme *Khaki*.
2. Choose *Use Outline Shading*.
3. Uncheck *Highlights & shadows*.
4. ☑*Include toolbox colors*.
5. Choose *finish*.

Milestones will now generate the schedule found on the following page.



Project to Milestones Wizard (continued)

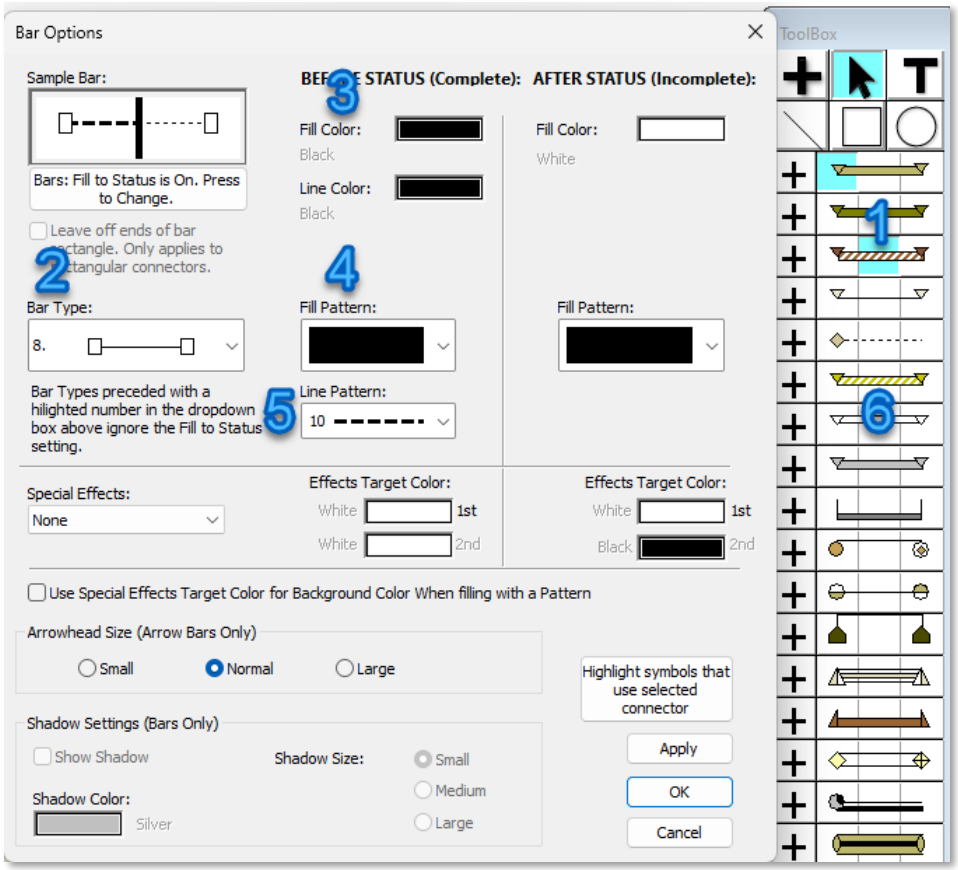
Imported Schedule



Customize the imported schedule

Change the Baseline Bars Style

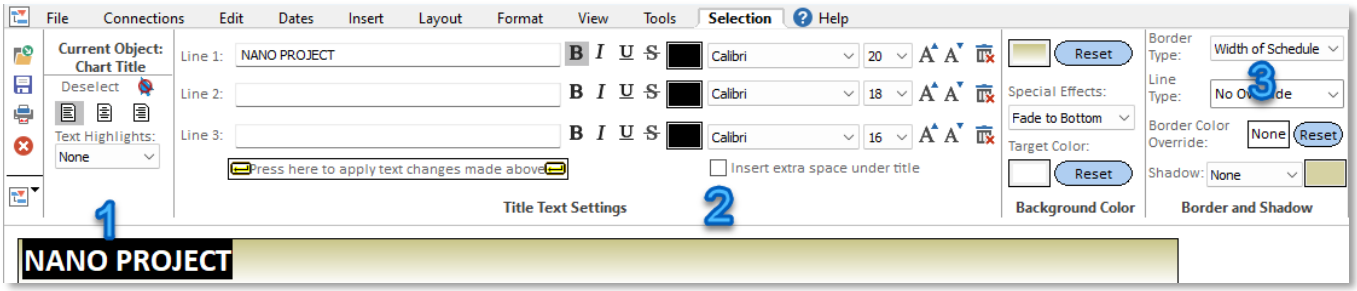
1. Double click the third horizontal bar (striped) in the toolbox. The Bar options dialog displays.
2. Change the Bar Type: to *#8*.
3. Change the Fill Color to *black*.
4. Change the Fill Pattern to *Solid* (scroll to top for solid option).
5. Change the Line Pattern to *#10*.
6. Choose *OK*. All bars on the schedule using the third horizontal bar in the toolbox are now a dotted line.
7. Double click the sixth horizontal bar (striped) in the toolbox. The Bar options dialog displays. Follow the above instructions to change this bar.



Change the Symbol Size

1. Choose the *Format* tab.
2. In the Frame, Highlights section select *Symbol Size*.
3. In the drop down that displays select *1.0*.

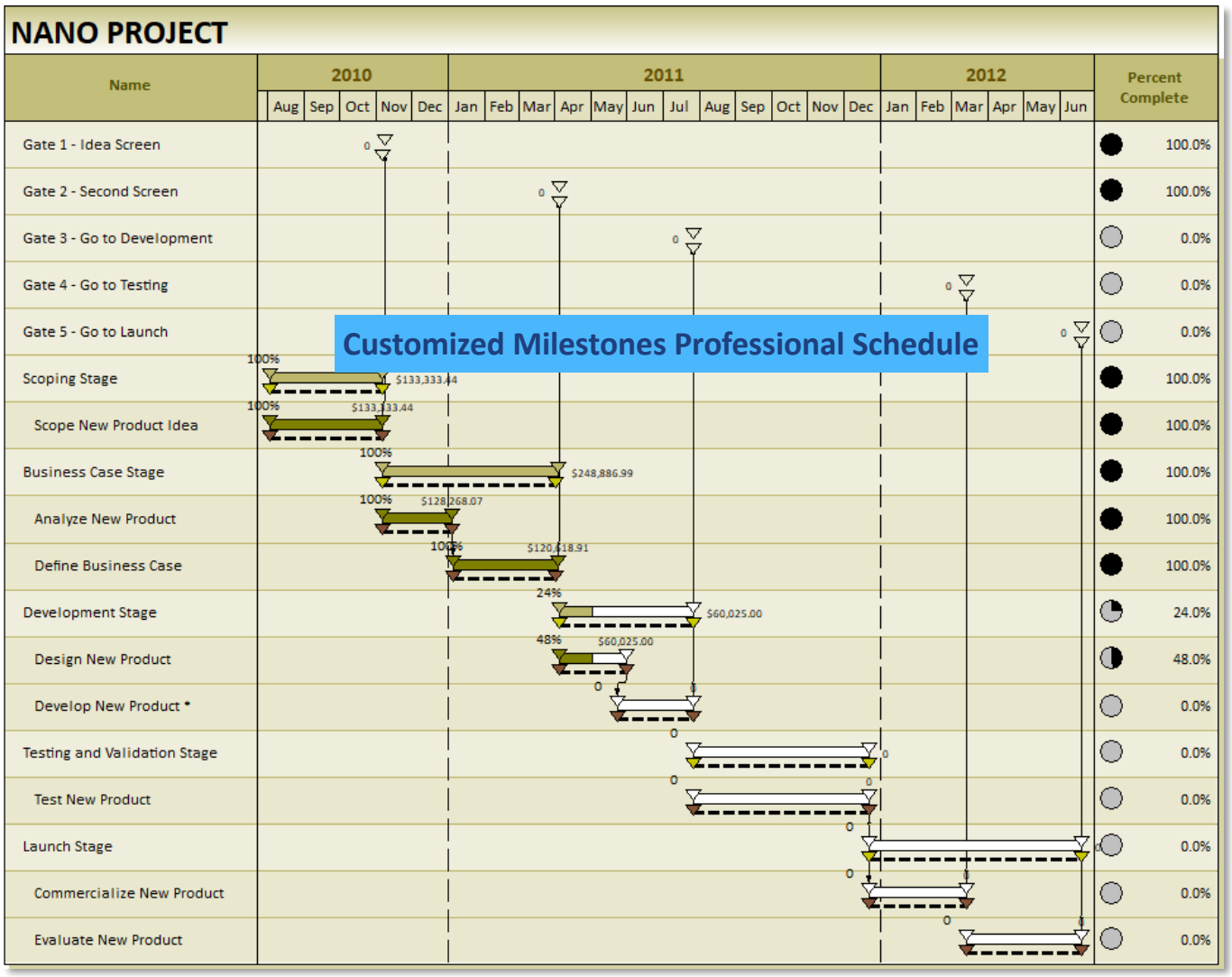
Change the Title



1. Click the title. The toolbar at the top of the Milestones window is now active for the title.
2. Uncheck *Insert extra space under title*.
3. In the Border and Shadow section next to Border Type: choose *Width of Schedule*.
4. Continue to next page to see the result of the changes.

Customize the imported schedule (continued)

Result



Save as a Custom Project Template

Now that you have your schedule looking exactly how you want, it can be saved as a **Custom Project Template**. Saving the schedule as **Custom Project Template** adds the schedule into the **Project to Milestones Wizard.** Once saved, next time you use the **Project to Milestones Wizard** it will be available in the **Use your own custom template** option for import of another Microsoft Project file.

1. Choose the *Connections* tab.
2. In the **Microsoft Project** section choose *Save Custom Project Template***.**
3. The **Microsoft Project Custom Import Template Description** dialog box displays. Enter a description for your template like *"My template with start, end, baseline start end bars."*
4. Choose *OK*.
5. The **Save Chart File** dialog box displays.

   Important:
   Save all Custom Project Templates to a folder that you will not delete or move. This should not be the same folder where you save your working Milestones Professional files.

   If an initial import file has more than one page and you want to use it as a Custom Project Template, delete all but one page of the schedule before saving it as a Custom Project Template.

   If you save a Custom Project Template and no longer want to see it in the wizard Use the ***Manage Custom Project Templates*** option found on the **Connections** tab in the **Microsoft Project** section.

6. Give your template a name like: *CustomTemplateProjectNano*.
7. Choose *Save***.**
8. Close the schedule.

Import Primavera XER Files using the Use Your Own Custom Template Option

Now you will import the **Nano XER** into the **Custom Project Template, *CustomTemplateProjectNano***, you just created.

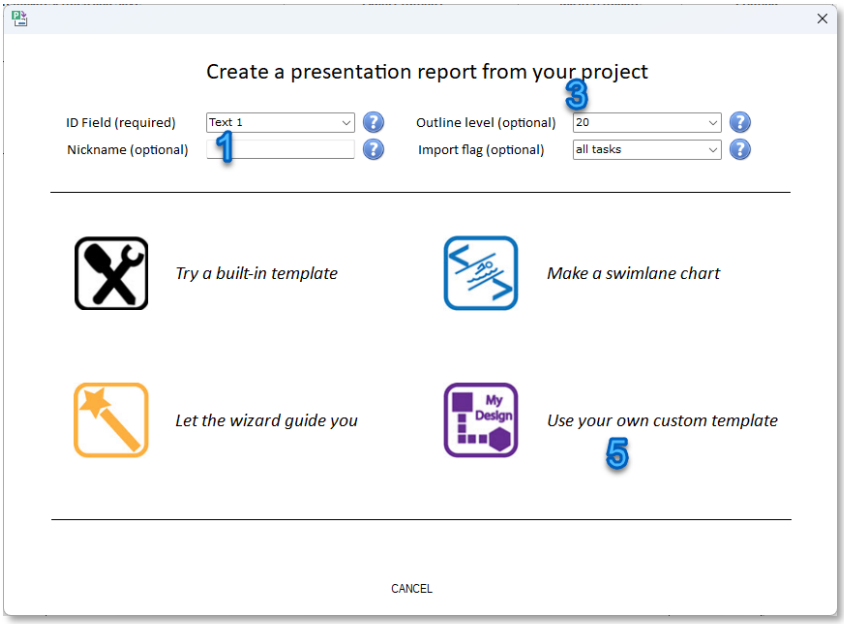
1. In Milestones Professional, choose the *Connections* tab.
2. In the **Other** section choose *Import Schedule from XER, XML etc. File*.
3. Select *XER:Primavera XER, etc. Project Import Wizard***...** The **Import Primavera Xer, XML, and Other File Types** dialog displays.
4. To select the file to import, navigate to **Program Files\KIDASA\Milestones Professional 2025 \Samples\Lessons folder**. Select *Primavera Nano.xer***.**
5. The **Select Project to Import** dialog displays.
6. Select the first Project *3869-PROD00914*.

The first window of the **Project to Milestones Wizard** displays.

Import Primavera XER Files using the Use Your Own Custom Template (continued)

Project to Milestones Wizard

1. For **ID Field (required)** , choose *Text 1*.
2. **Nickname** is not available for XER files.
3. For **Outline level (optional)** choose *20*.
4. **Import Flag (optional)** is not available for XER files.
5. Choose *Use your own custom template*.
6. The **Project to Milestones Wizard - Custom template options** dialog displays.



The Project to Milestones Wizard - Custom template options dialog

1. Click the *down arrow* to select the saved custom template (*CustomTemplateProjectNano.mlq*.)Note that the Wizard displays a picture of the ***CustomTemplateProjectNano.mlq***.
2. Choose *Project summary bars*.
3. ☑*Reset date range*.

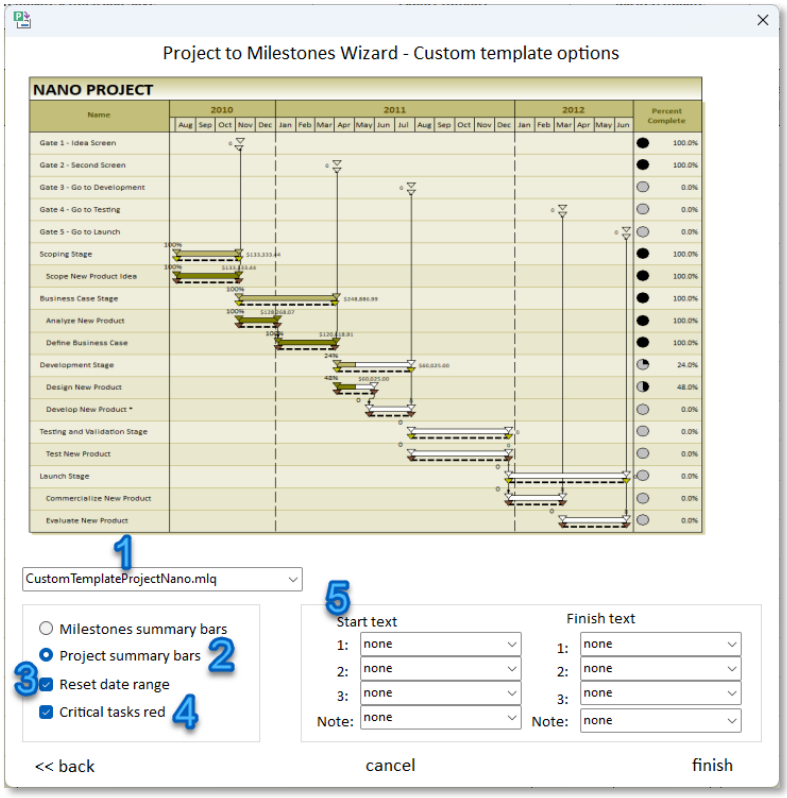
   The template has a set date range. If this option is not selected, symbols if out of the templates date range will import but will not show until the date range is updated in Milestones.

4. ☑*Color Critical Tasks Red*.

   Select this option to have all Primavera tasks marked as critical color red in the generated Milestone file.

5. Select *none* for all text options.

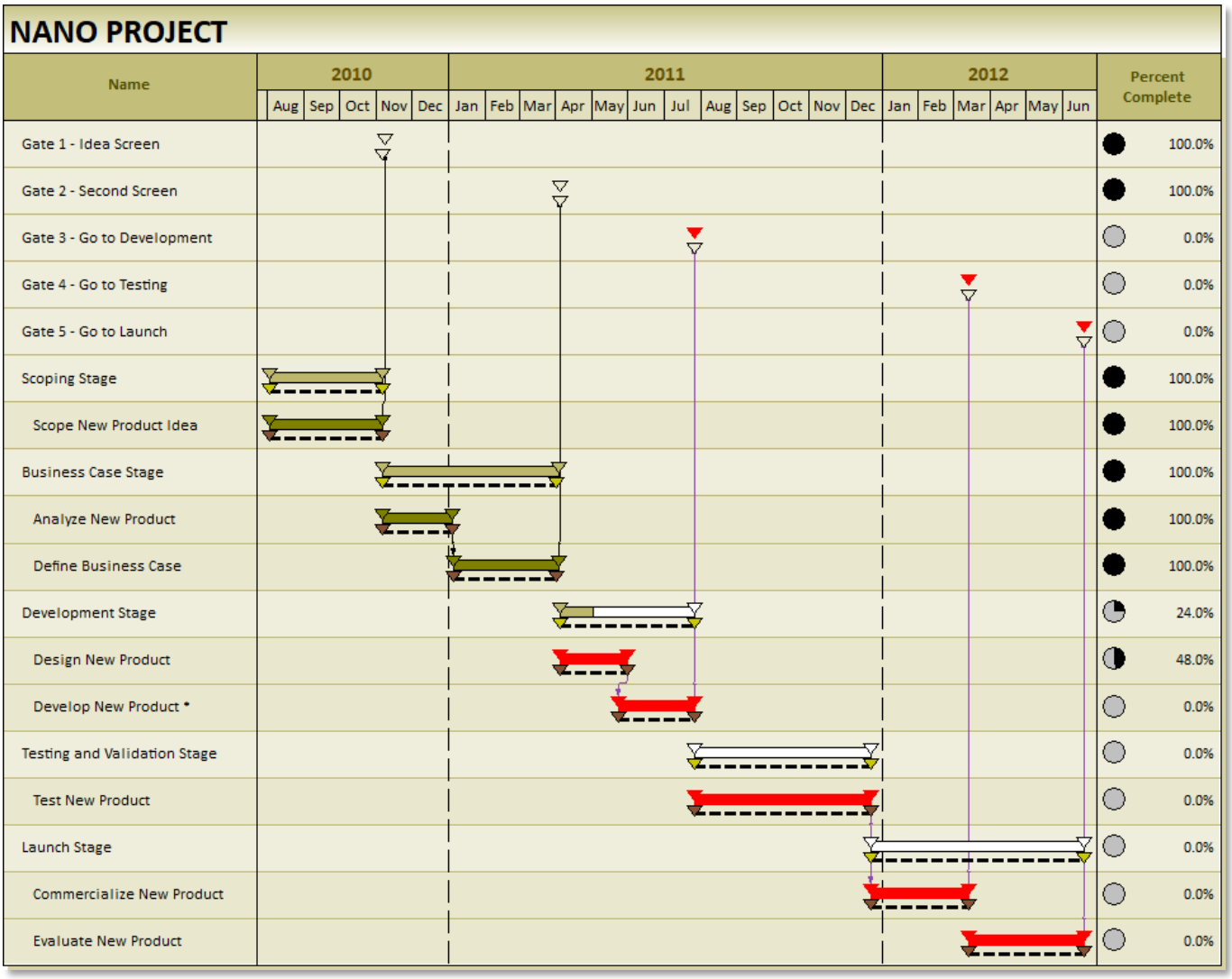
   Even if your template has symbol and note text from the initial import, you still must select the symbol or note text in this dialog to have text display or not display on the generated schedule.



6. Choose *Finish*. The generated file (view on next page) will look like the saved Custom Project Template, ***CustomTemplateProjectNano.mlq***, with the exception of the new options selected; critical task colored red.
7. Save this file to a different location than were you saved the Custom Project Template. Choose *Save As*. Choose *Chart*. Call the schedule *Project Nano*. You will use this schedule later in the tutorial, so keep it opened.

Import Primavera XER Files using the Use Your Own Custom Template (continued)

Result



Update ("Refresh") the Milestones Professional schedule from a changed XER file

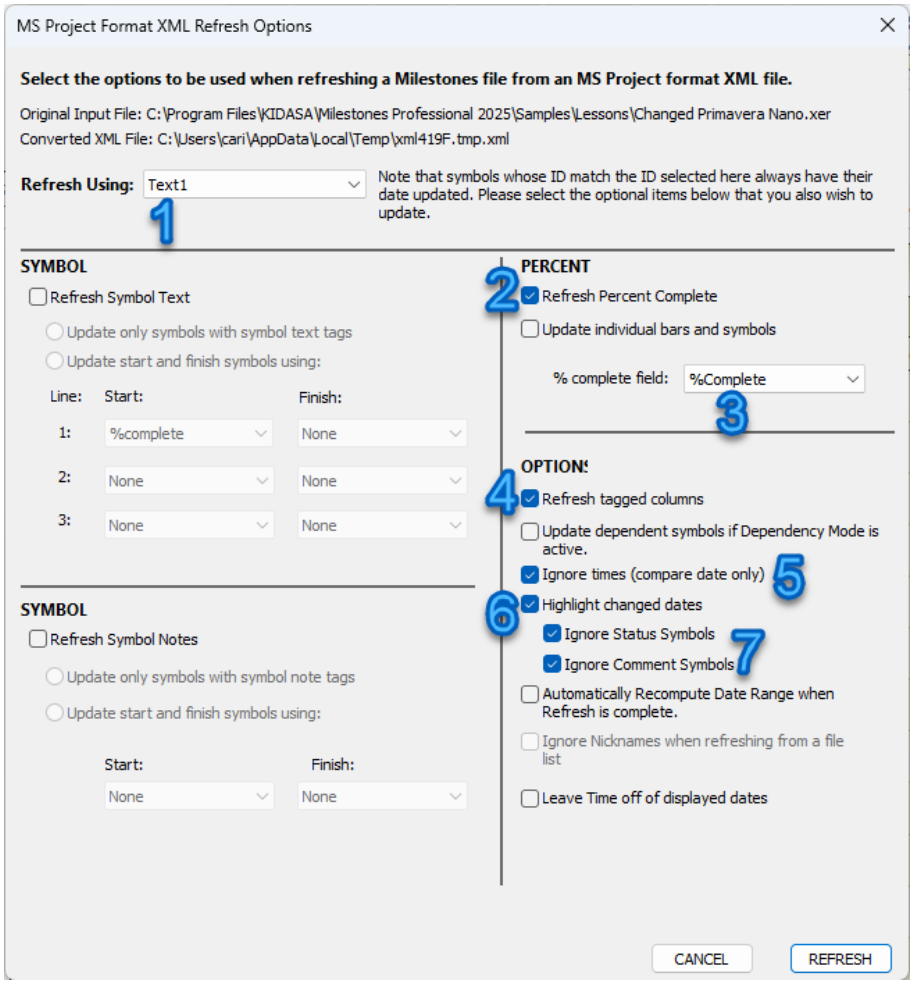
The **Changed Primavera Nano.xer** that will be used in this section was generated after the following change was made to the initially imported ***Primavera Nano.xer***

Development Stage sub task ***Design New Product*** finish date changed from **5/31/2011** to ***6/30/2011***. Due to this change the following item also changed.

1. Go back to Milestones Professional. The ***Project Nano.mlq*** schedule should still be opened. If not open it.
2. Choose the *Connections* tab.
3. In the **Microsoft Project** section choose *Refresh Previously imported Project*.
4. From the drop down choose *Refresh from Primavera XER File…*
5. The **Select the file to refresh** dialog box displays. Select *Changed Primavera Nano.xer* by navigating to the ***Program Files\KIDASA\Milestones Professional 2021\Samples\Lessons folder***. Choose *Open*.
6. Select the first Project *3869-PROD00914*.
7. The **MS Project format XML Refresh Options** dialog displays.

The MS Project format XML Refresh Options dialog

1. **For Refresh Using** choose *Text1*.
2. **Under Percent Complete**: ☑*Refresh percent complete*.
3. **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.
4. Under **Options,** ☑*Refresh tagged columns*. This updates the columns with the new information.
5. Under **Options,** ☑*Ignore times*. Only the date of a task will be considered when the file is updated.
6. Under **Options,** ☑*Highlight Changed Dates*. To have any Baseline and Normal symbols that update highlight in orange.
7. ☑*Ignore Status Symbols* and *Ignore Comment Symbols*



8. Choose *Refresh*. See the generated schedule on the next page.

Update ("Refresh") the Milestones Professional schedule from a changed XER file (continued)

The MS Project format XML Refresh Options dialog

1. **Refresh Using** choose *Text1*
2. Under **Symbol Text** ☑*Refresh Symbol Text*.
3. Under **Symbol Text** choose: *Update only symbols with symbol text tags*. This is necessary as some percent complete values in the primavera XER file changed, so the percent complete values as symbol text on the Milestones schedule need to be updated.
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. ☑*Ignore Status Symbols* and *Ignore Comment Symbols*.
10. Choose *Refresh*. The schedule will be generated

See the next page to view the updated Milestones schedule. It reflects the change made to the finish date which impacted percent complete, the percent complete column, and the percent complete value as symbol text.

Update ("Refresh") the Milestones Professional schedule from a changed XER file (continued)

Result

As selected in the Refresh dialog box, highlighted in orange is the finish date that changed in the Primavera file.

To turn off orange highlighting choose the *Connections* tab in the ***Other*** section uncheck *Refresh Highlighting*. Highlighting does not save when the file is saved.

Note: The Percent Complete column value has changed

