Milestones PROFESSIONAL®

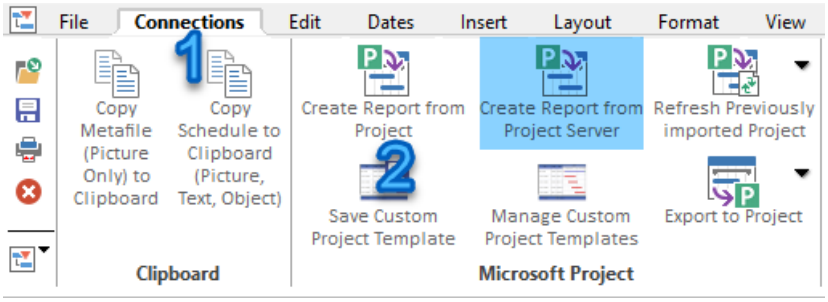
TUTORIALS

Lesson 19 - Microsoft Project to Milestones Wizard - Microsoft Project Not installed

In this lesson you will learn how to:

- Import Microsoft Project MPP files into Milestones Professional using the Microsoft Project to Milestones Wizard
- Refresh the Milestones Professional schedule when the Microsoft Project file has changed

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



Important This lesson is only for importing an MPP file when Microsoft Project is NOT installed on your computer. If you have Microsoft Project, go to Lesson 16.

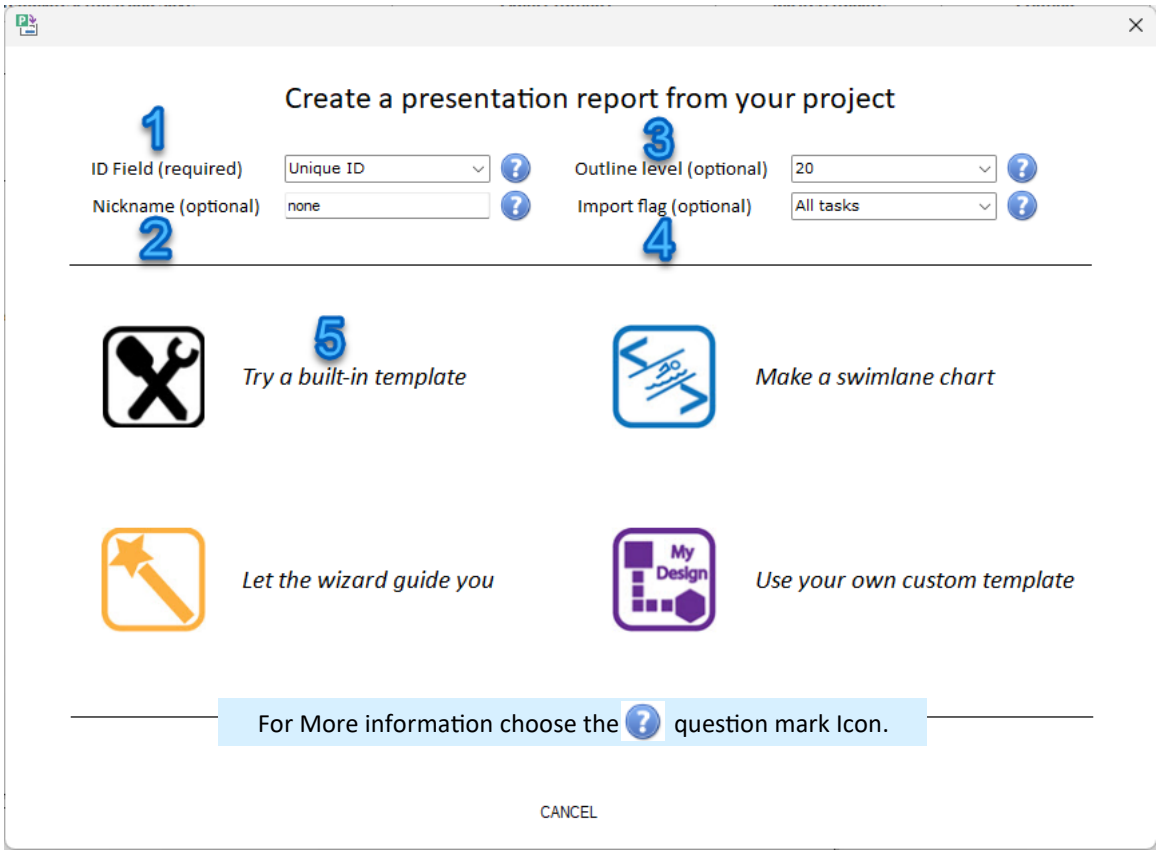
1. In Milestones Professional, choose the *Connections tab*.
2. In the Microsoft Project section choose *Create Report from Project*. The Import a Microsoft Project MPP file dialog box displays.

   If using Project Server or Project Online select ***Create Report from Project Server*** option.

3. Choose the browse button and navigate to the *Program Files\KIDASA\Milestones Professional 2025 \Samples\Lesson folder*. Select *MS Project File.mpp*.
4. Choose *Continue*.
5. 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: Only works if Microsoft Project is installed on your computer. Use your own custom template: Starting with a schedule imported using the wizard then modified to your liking then saved to use the next time you import.



1. For ID Field (required), choose *Uniqueid*.
2. For Nickname (optional), leave blank.

   Once a schedule is built it can be refreshed. In order for Milestones to have the connection to the 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.
3. For Outline level (optional), choose 20.

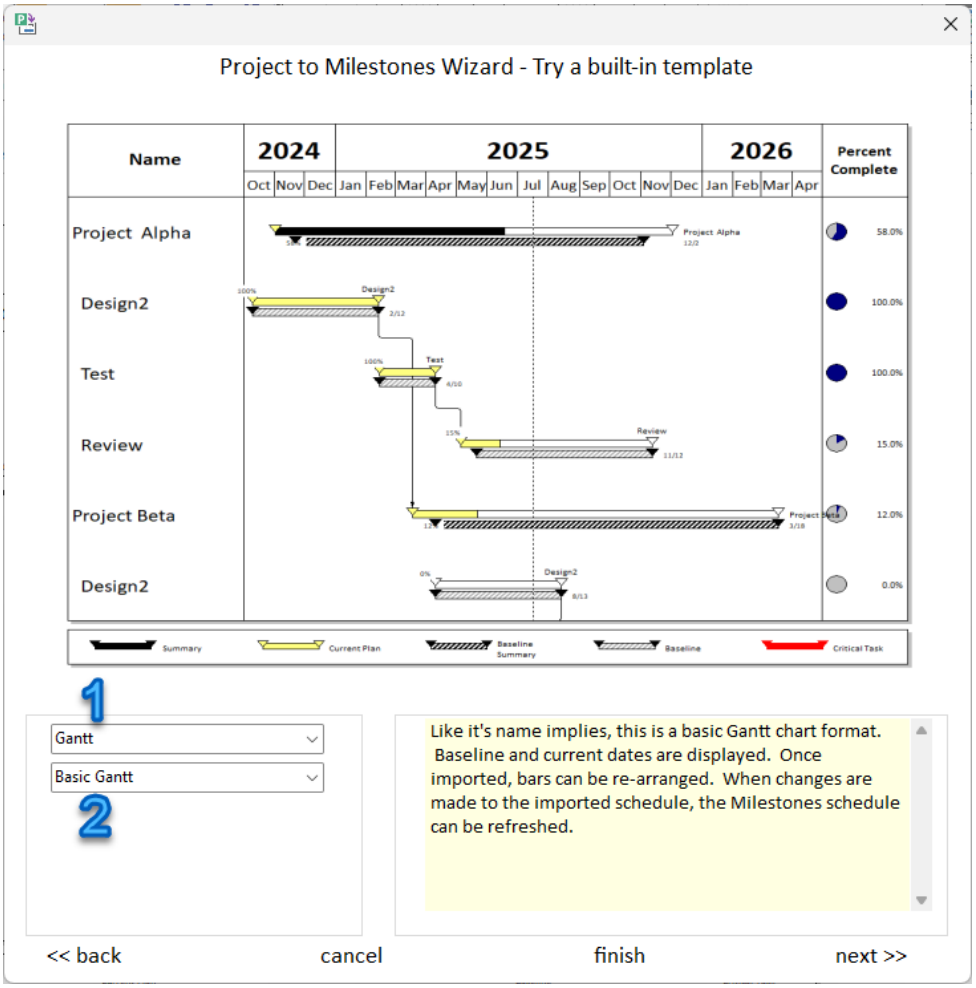
   Outline level brings information a from that level and below.
4. Import Flag (optional), choose *All Tasks*.

   In Microsoft Project, only the task flagged yes in the flag field will import.
5. Choose *Try a built-in template*.
6. The Project to Milestones Wizard - Try 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.

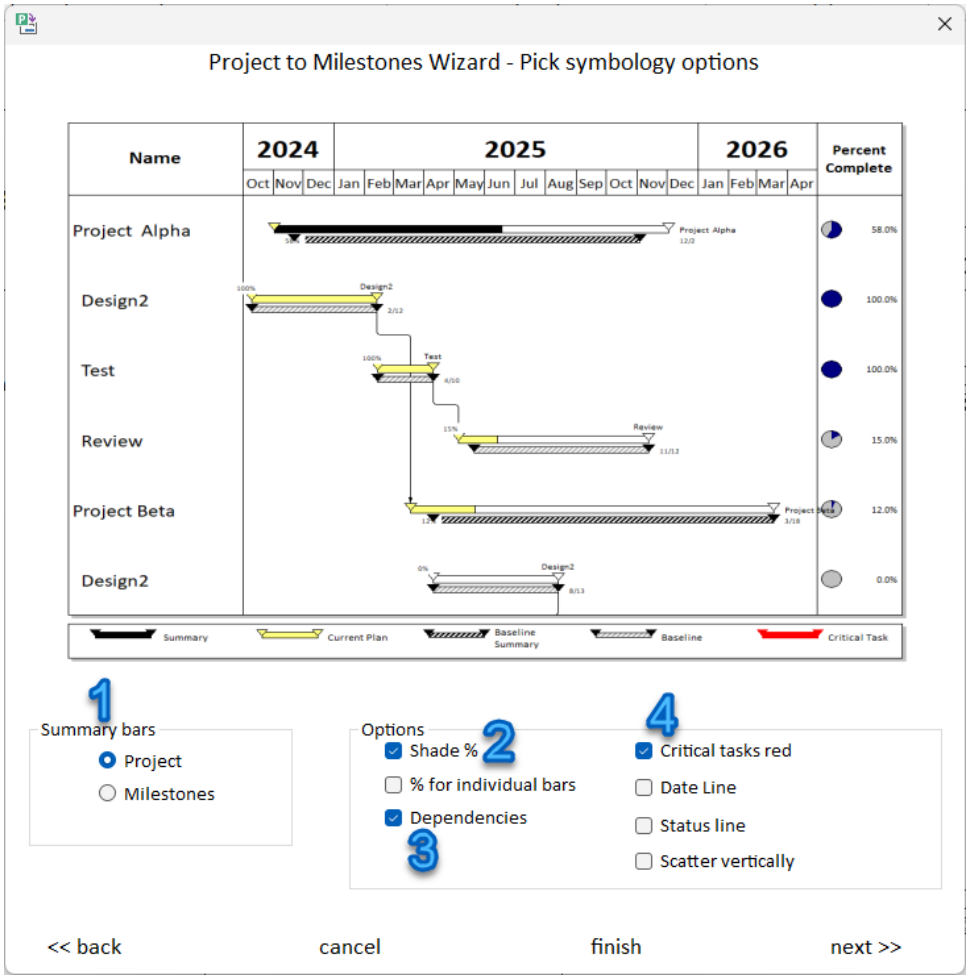


Make the following selections:

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.

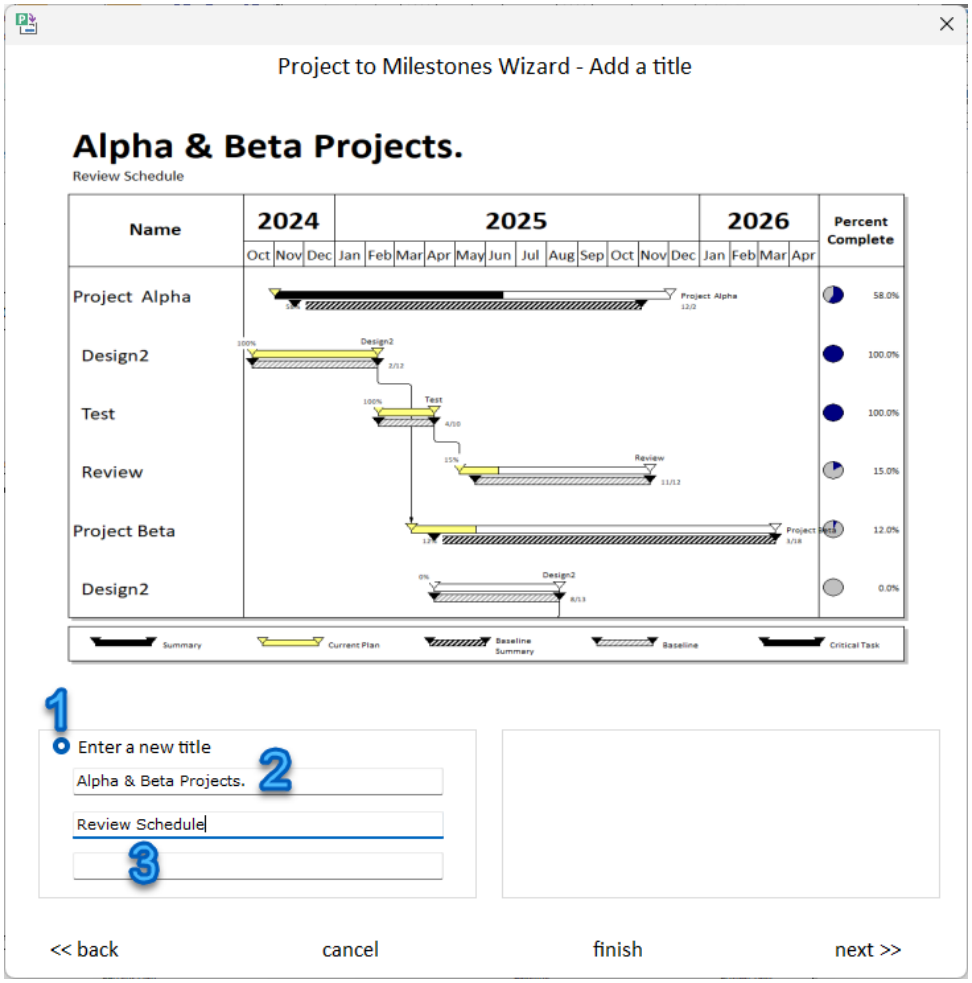
3. ☑ *Dependencies* - Dependent symbols (successors) will be linked with vertical links.

   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*.
6. The Project to Milestones Wizard - Add a title dialog displays.

Microsoft Project to Milestones Wizard (continued)

Add a title dialog

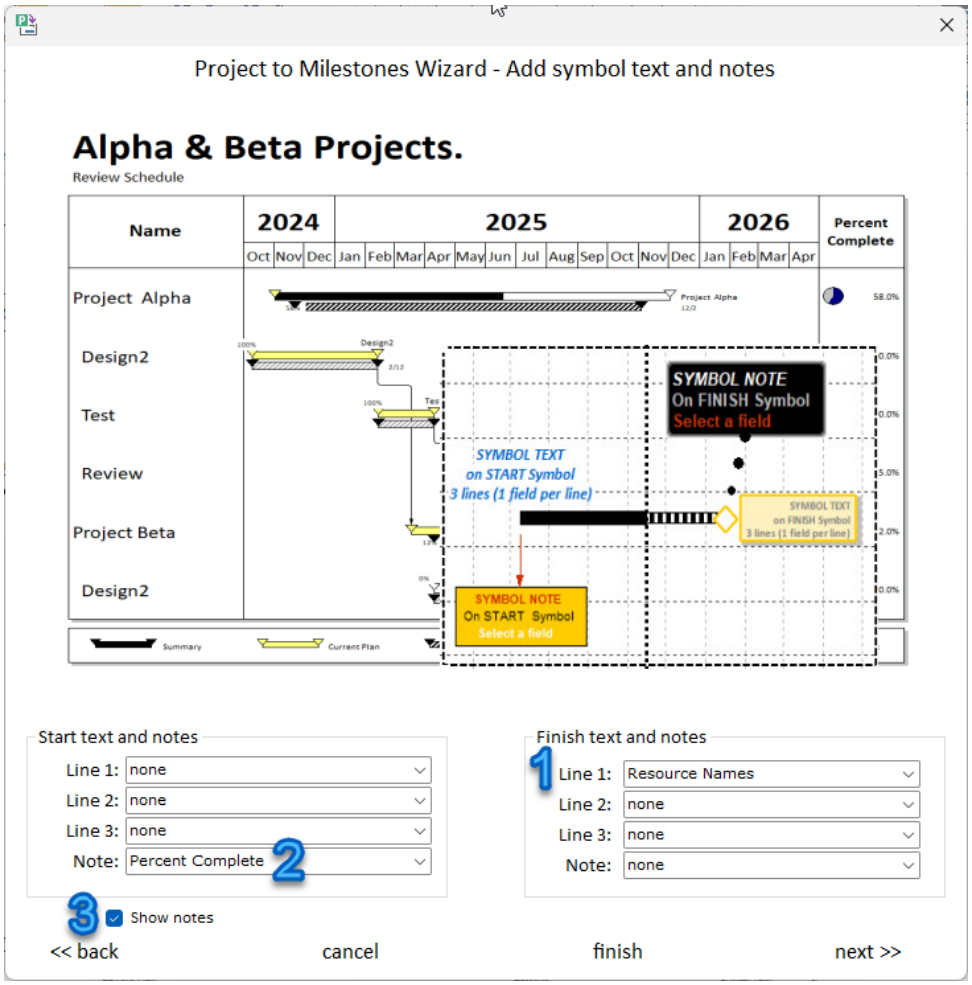


Make the following selections:

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

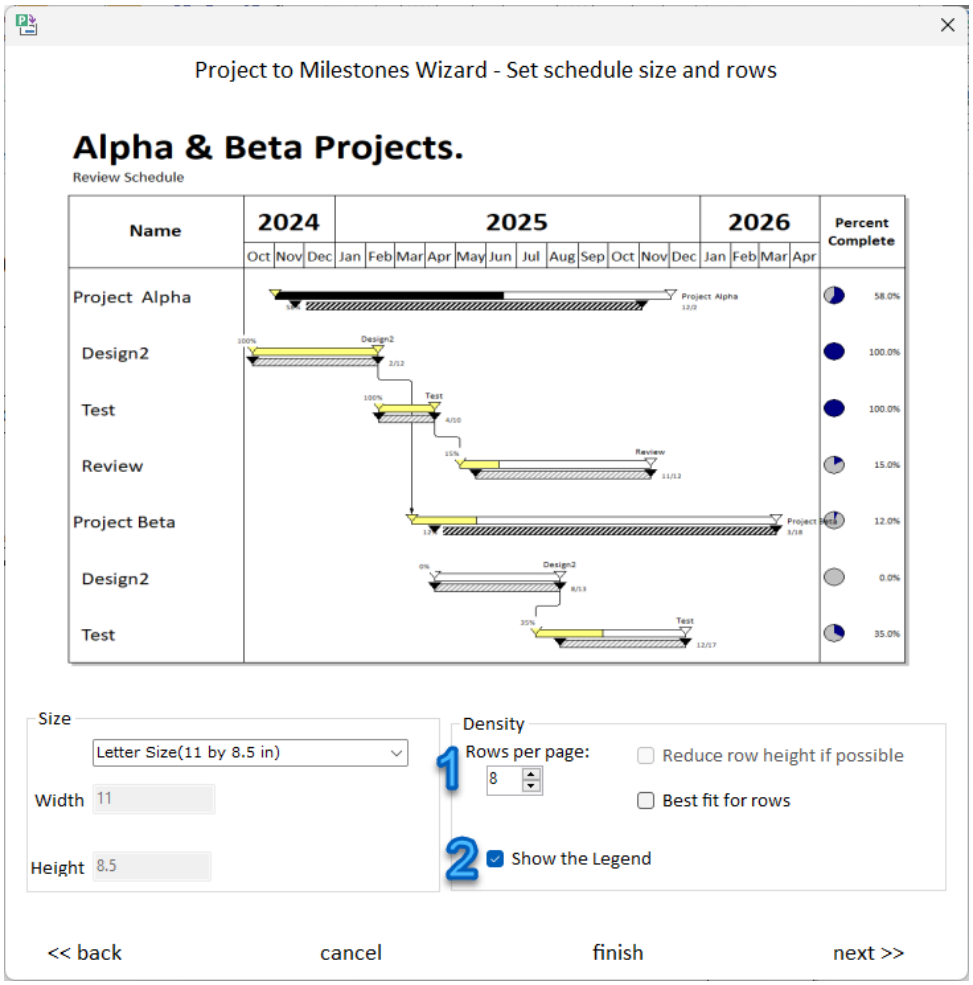


Make the following selections:

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)

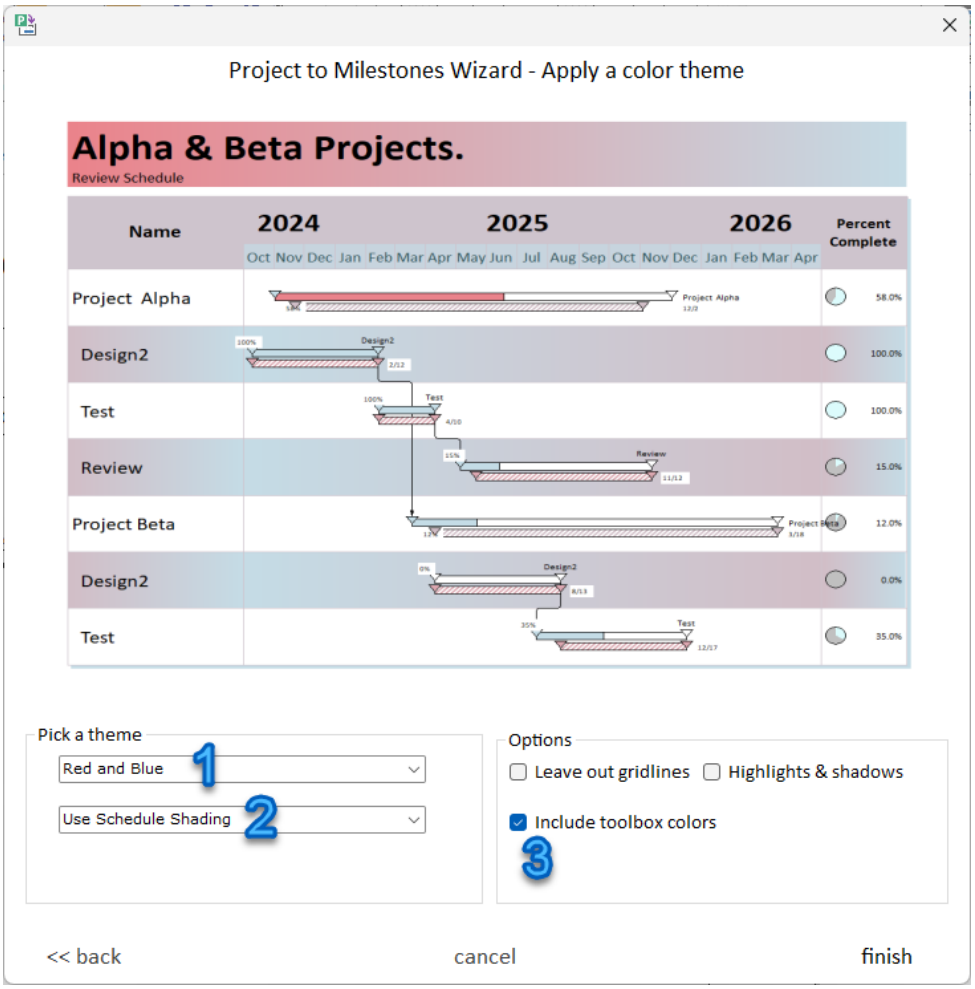
Set schedule size and rows dialog



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

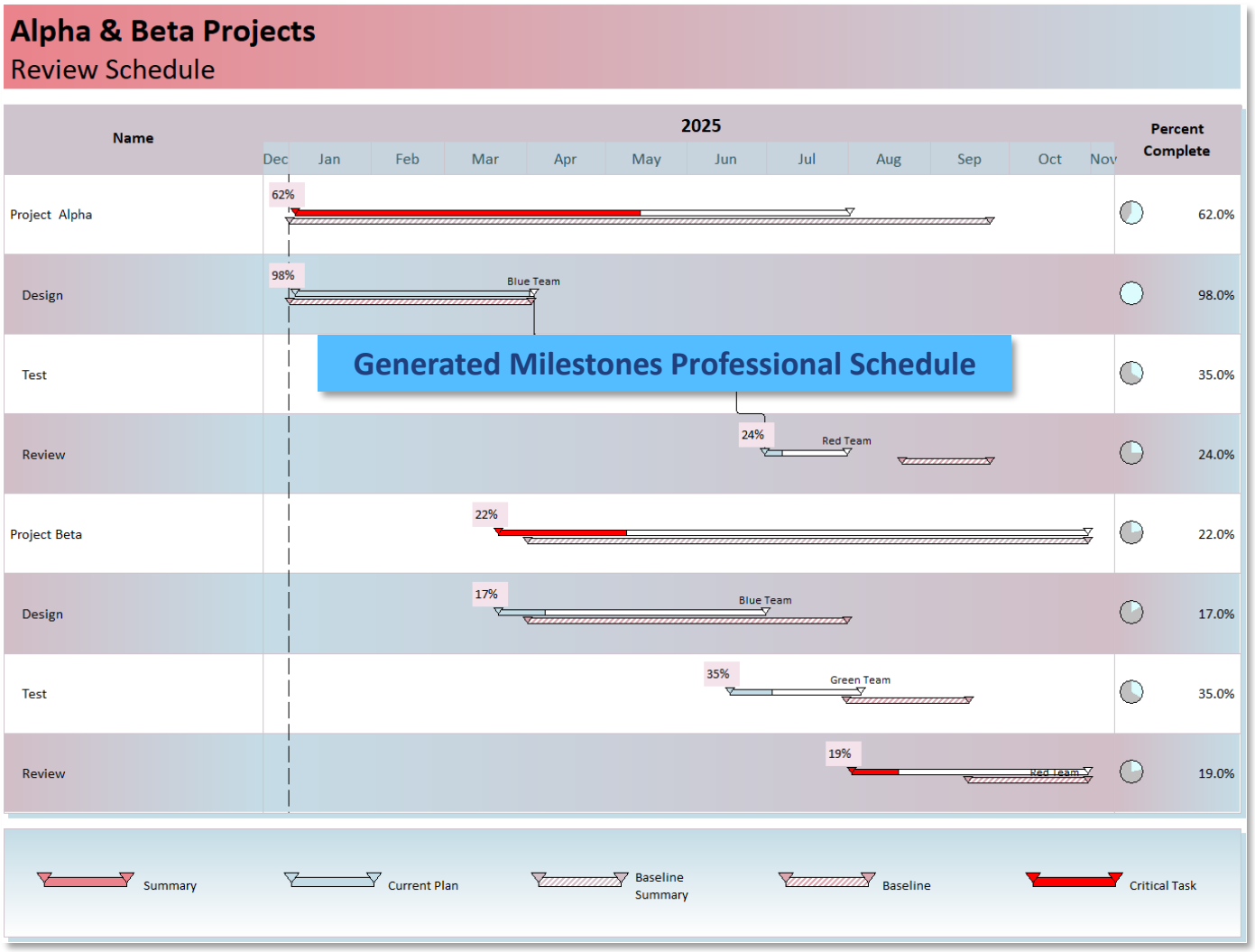


1. Under Apply a color theme choose *Red and Blue*.
2. Choose Use ScheduleShading.
3. ☑ *Include toolbox colors*.
4. Choose *Finish*.

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

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%

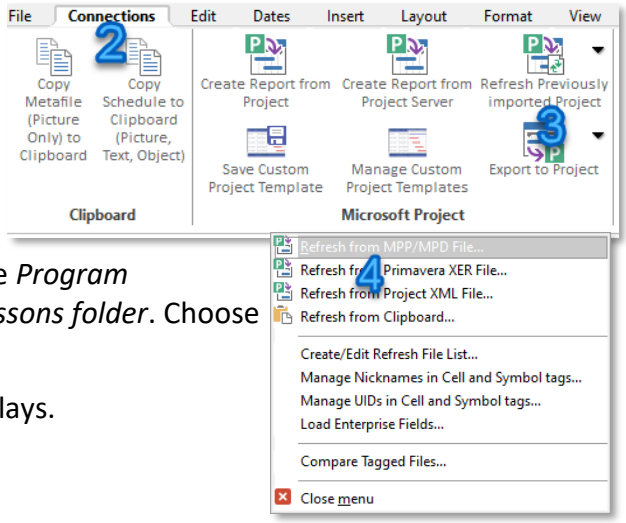
Project Beta tasks:

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%*.

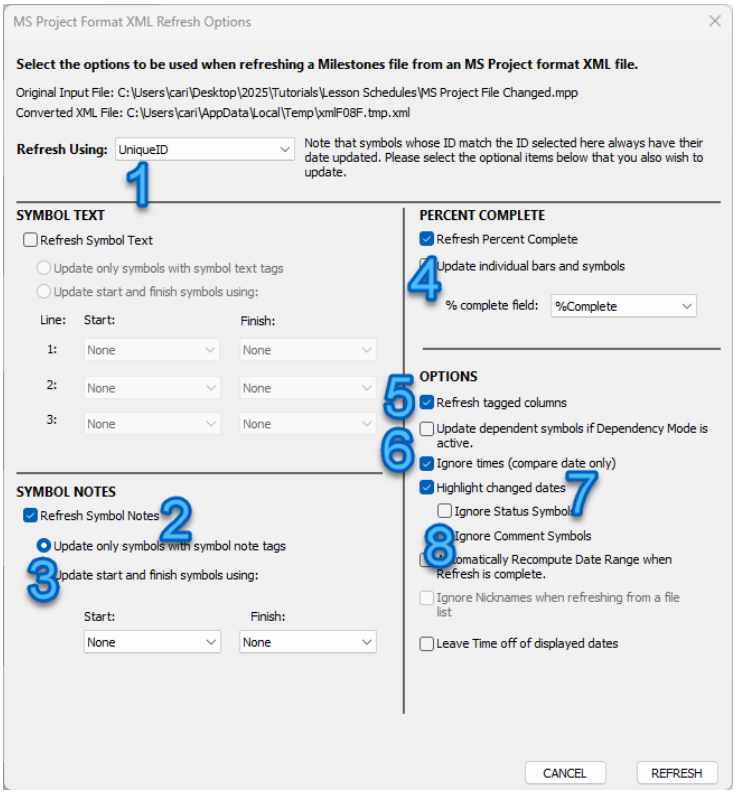
Refresh the Milestones Professional schedule when the Microsoft Project file has changed (continued)

1. Go back to Milestones Professional, *Alpha & Beta Projects.mlp* schedule. It 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 MPP/MPD File*… The Select the file to refresh 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 MS Project format XML Refresh Options dialog displays.



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

The MS Project format XML Refresh Options



1. For Refresh Using : select *UniqueID*. Under Percent Complete: ☑*Refresh percent complete*.

   You should always select the unique identifier used in the original import.

2. Under SYMBOL ☑ *Refresh Symbol Notes,*
3. Under SYMBOL ☑ *Update only symbols with symbol notes tags*.
4. Under PERCENT ☑ *Refresh Percent Complete* and for the % complete field: choose *% Complete.* This is necessary to have the fill to status of the symbols and horizontal bars update.
5. Under OPTIONS ☑ *Refresh tagged columns*. To have the information in the Percent Complete column update based on the changes in the Microsoft Project file.
6. Under OPTIONS ☑ *Ignore times*. Only the date of a task will be considered when the file is updated.
7. Under OPTIONS ☑ *Highlight Changed Dates*. To have any Baseline and Normal symbols that update highlight in orange.
8. Under OPTIONS uncheck *Ignore Status Symbols.*
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)

As selected in the Refresh dialog box, highlighted in orange are the finish dates that were changed in the Microsoft Project file. Because the finish dates were changed the percent complete also changed thus forcing the status symbols to move and they are also highlighted in orange.
Note: The percent values as symbol text updated and some Percent Complete column values have changed.

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

Highlighting does not save when the file is saved.

