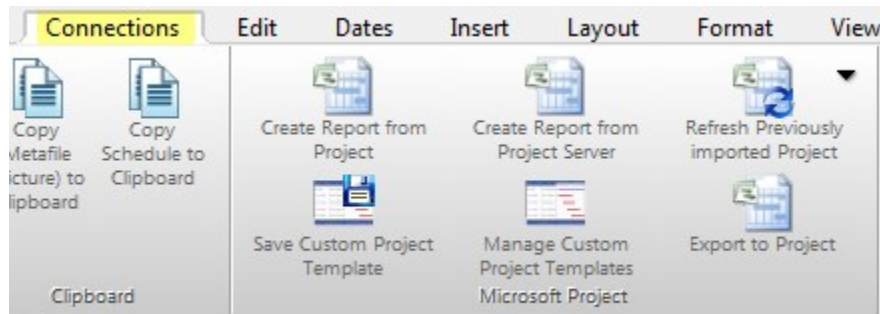# Create Presentation Reports for Microsoft Project

Transform your Microsoft Project schedules into presentation reports with Milestones Professional.

KIDASA Software's Milestones Professional offers a direct interface to Microsoft Project, making it easy to generate presentation report formats beyond the standard formats offered by Microsoft Project. In the following pages, you'll learn how to:

Create
Use the Project to Milestones Wizard to create presentation reports for Microsoft Project, choosing from more than 70 built-in presentation formats.

Customize
Is one of the 70+ formats almost perfect? Customize it, make it perfect and add it to your Milestones Project Wizard as a custom project template.

Build it Your Way Way
Do you have a unique presentation format? Design and build it "from scratch"; tag milestone symbols, and columns to let Milestones know what information you want to bring in from Microsoft Project.

Stay Up-to-Date
Keep all of your presentation schedules up-to-date with the latest dates and information from Microsoft Project with Milestones refresh.

Create presentation reports for Microsoft Project.

The **Connections** tab on Milestones Professional's toolbar offers easy access to all Microsoft Project options.

Choose **Create Report from Project** or **Create Report from Project Server** to start the Project to Milestones Wizard.
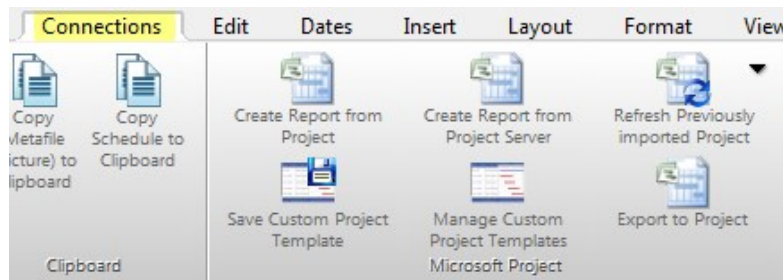
Connections Tab

The Project to Milestones Wizard offers a visual representation of the schedule as it is created, allowing you to see the effects of the formatting choices you make in a dynamically updated screen.

Start with one of the built-in formats or use your own custom chart to begin. Follow the prompts and watch as your Microsoft Project information is brought into a professional-looking Milestones schedule.


Project to Milestones Wizard
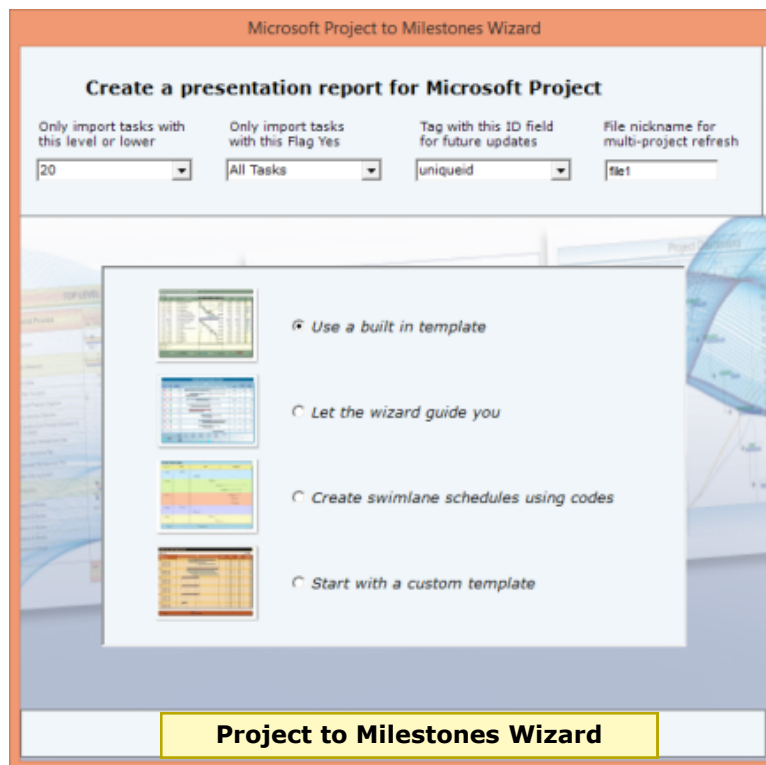
## *Built-in templates* over 70 templates in these categories:

- *Gantt* contains layouts suited to a basic Gantt schedule, including start and finish dates.

- *Stoplight* formats offer several commonly used presentation red, yellow, green stoplight charts for easy management viewing of key indicators.

- *Milestone* charts show tasks with zero duration or finish dates only.

- S*ummary* charts are condensed presentation formats.

- Choose one of the *earned value* formats and show an earned value graph along with your project schedule.

- *Resource* charts show work variance, resources and other data by task, often with a graph below the schedule.

- *Status* formats display current, remaining, or slipping tasks.

- *Dashboard* charts offer several unique formats with the popular "dashboard" appearance and content.

- *Special* offers three formats which did not fall into one of the previous categories: Work remaining versus money remaining, percent complete bar graph, and finish variance.
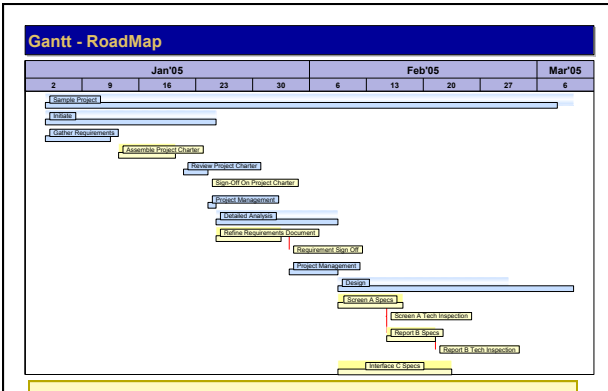
Milestones PROFESSIONAL®
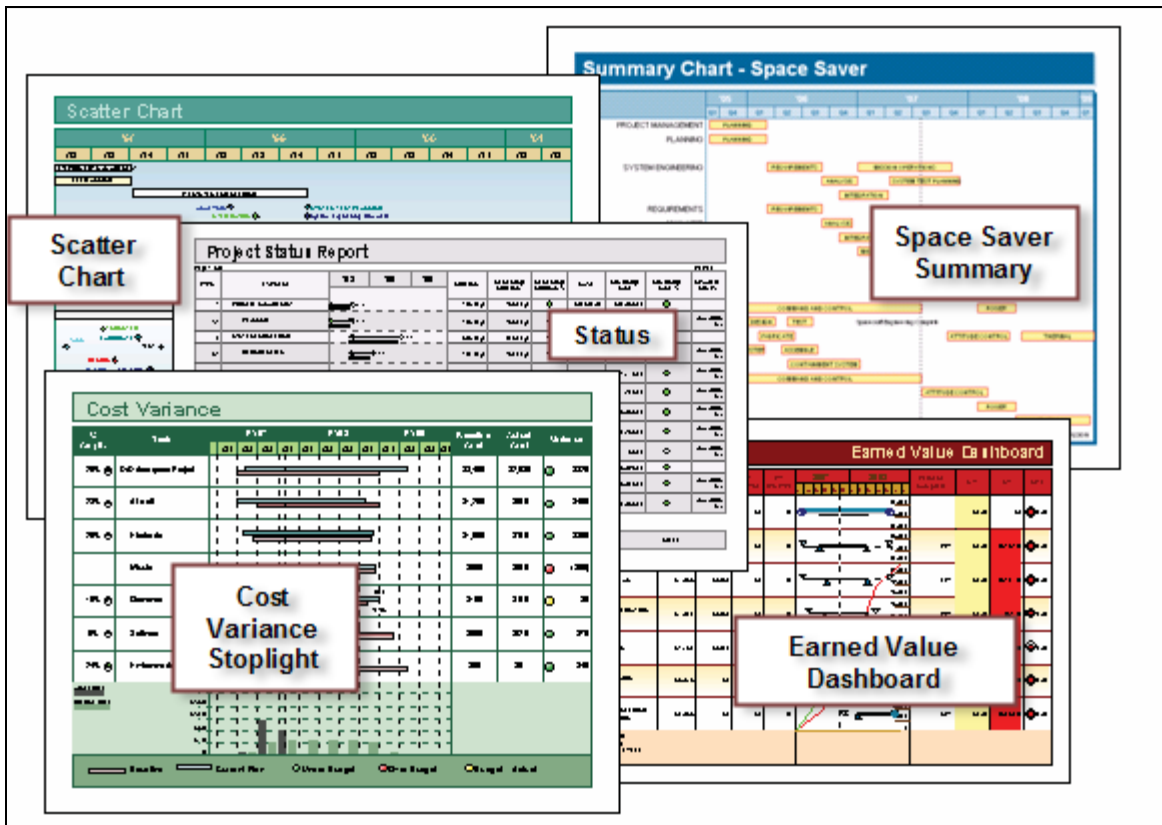
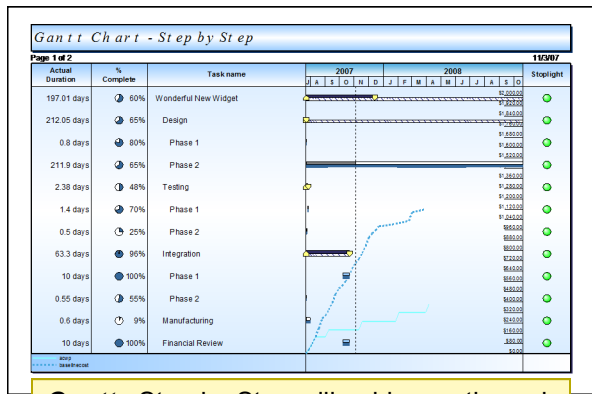# CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT
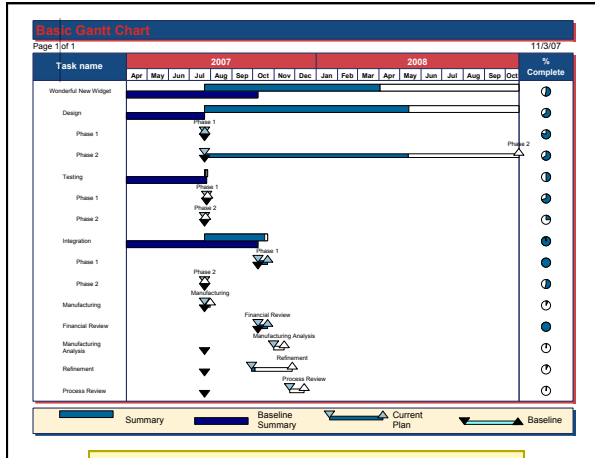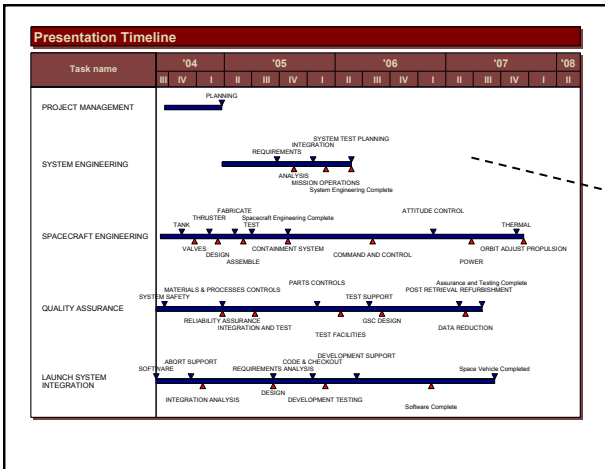

Gantt -Basic Gantt Chart
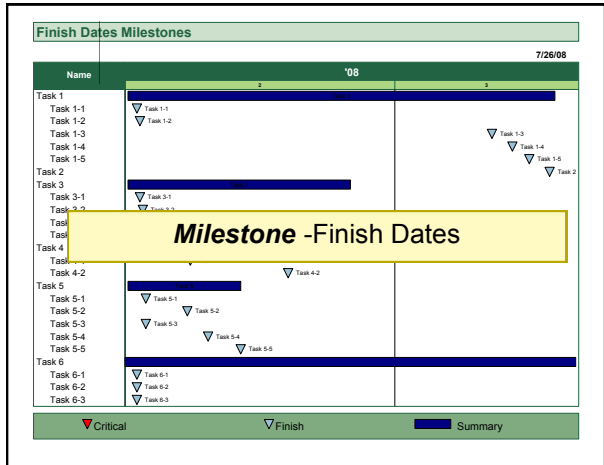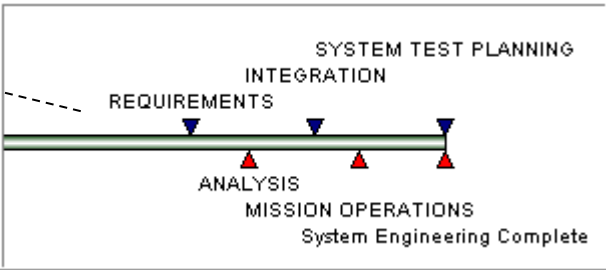

Milestone -Finish Dates

Gantt -Roadmap shows current plan plus baseline along with the task name.

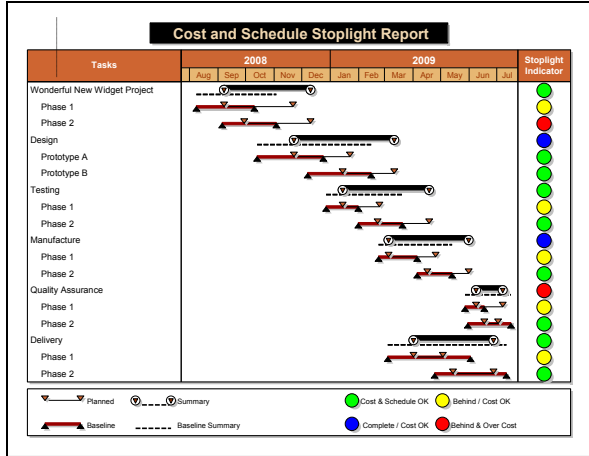*Gantt* - Step by Step will guide you through building your own format by adding columns, stoplights and graphs.

Summary - Presentation Timeline

Milestones
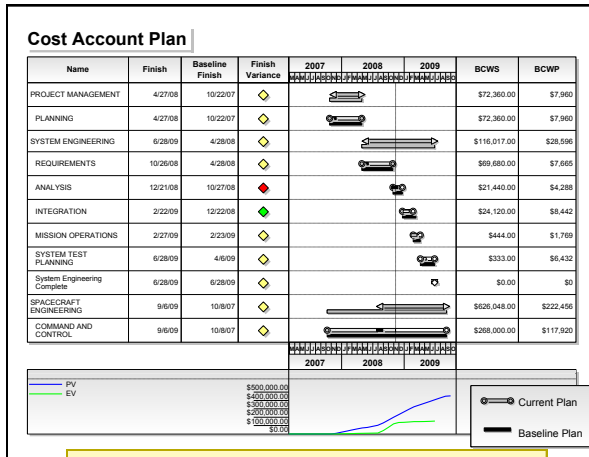**PROFESSIONAL**®

CREATE PRESENTATION REPORTS FOR MICROSOFT PROJECT
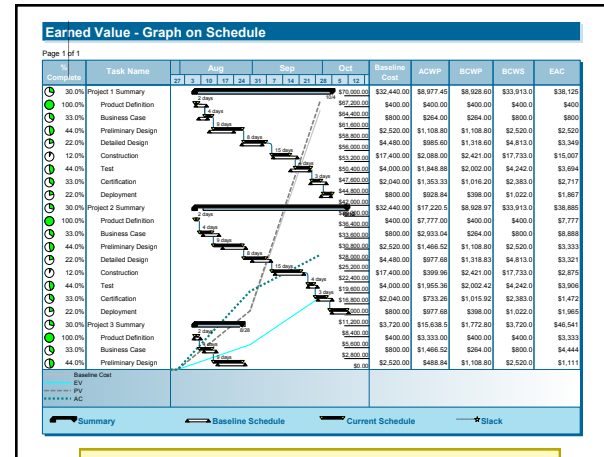

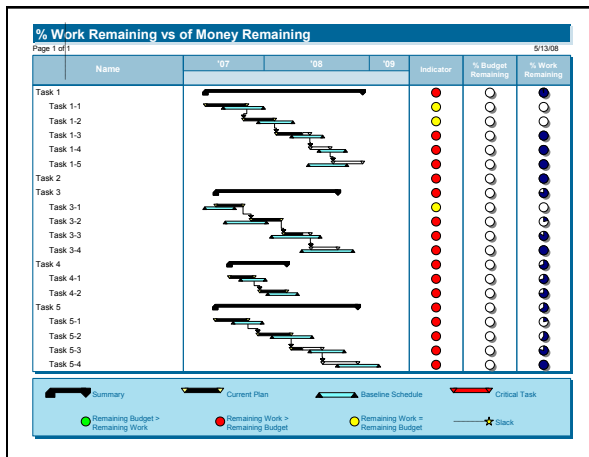**Stoplight**—Cost and Schedule Report
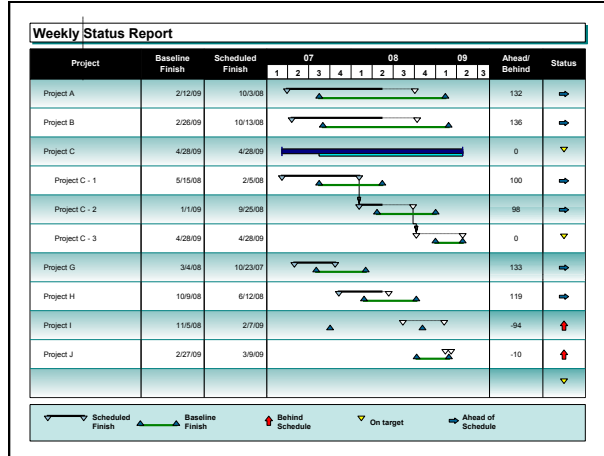
Status—Weekly Status Report
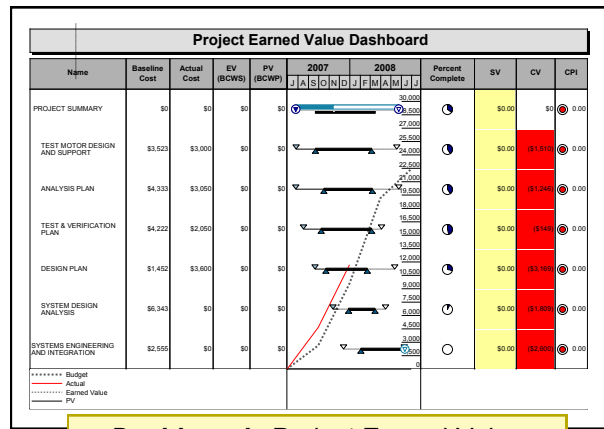

Status - Cost Account Plan

Earned Value - Graph on Schedule

Special - % Work Remaining vs % Money Remaining

Dashboard - Project Earned Value Dashboard

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Customize project presentations with custom project templates.

Can't find a chart format in the Project to Milestones wizard that is exactly what you need? Import one of your Microsoft Project Schedules, customize the presentation Milestones chart and save it as a **Milestones custom project template.**

1   Find a presentation format that closely meets your requirements.

Custom Project Template Examples

2   Customize it so that it's just right for your needs.

3   Save your customized chart as a custom project template.

4   From then on, when you create your presentation charts, choose the custom presentation chart you created.
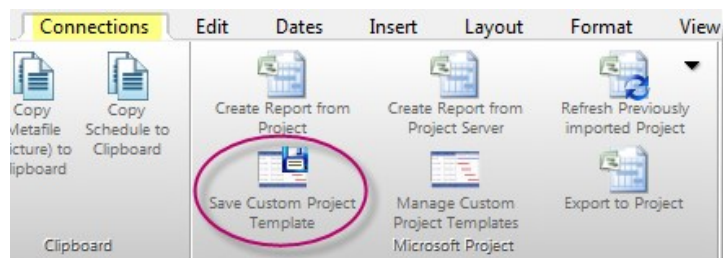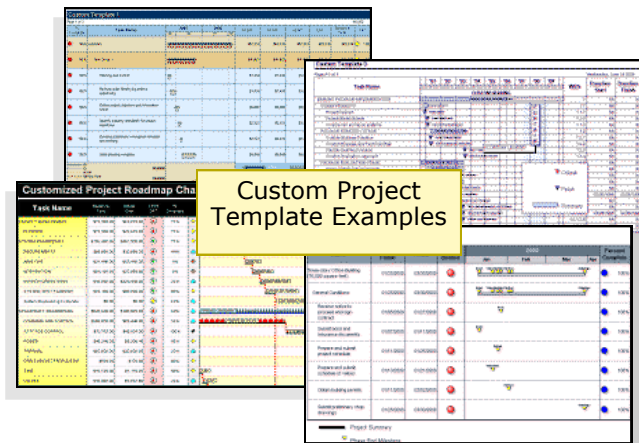
For more information about Milestones Professional 2015 and Microsoft Project
choose **Help Topics** on the **Help** tab and
view the **Work with Microsoft Project** book in the Table of Contents.

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Stay Up To Date as Project Dates Change with "Refresh"

Refresh

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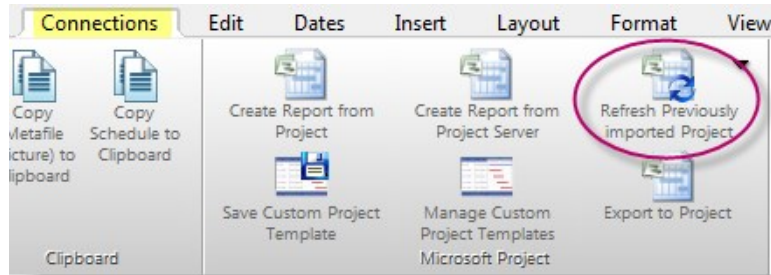
Tags

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 (or other *unique identifier specified) 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.

Unique Identifiers
* Unique ID
* Text 1-30
* Project Server GUID
* WBS
* Enterprise Text 1-40
* Enterprise Project Text 1-40

The picture to the right is an example of a symbol's tags. In this example, the symbol will be matched to the start date of the Microsoft Project task with unique id 5. Percent complete is shown in the first line of symbol text.

To see the symbol tags in a schedule click the symbol on the schedule. The toolbar changes to **Current Object Symbol.** Then select the **Symbol Links** tab.

During the refresh process, tagged items in Milestones are matched to their counterparts in the selected Microsoft Project file. Tagged symbols are updated using the latest information from Project.
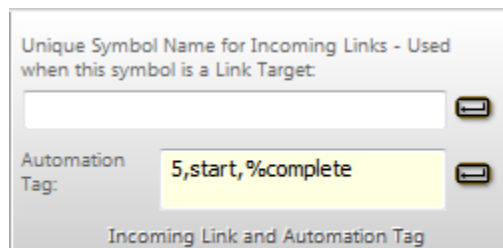
For more information about Milestones Professional 2015 and Microsoft Project
choose **Help Topics** on the **Help** tab and
view the **Work with Microsoft Project** book in the Table of Contents.

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Refresh Example

Initial Import

	% Complete	Resource Initials	Task Name	Start	Finish	Unique ID
1	67%	JJ,DE,SB	Task 1	Fri 8/15/08	Mon 8/18/08	1
2	60%	CW,DE,JJ	Task 2	Mon 8/18/08	Wed 8/20/08	2
3	44%	DD,EE	Task 3	Thu 8/21/08	Wed 8/27/08	3
4	50%	AW	Task 1	Tue 8/26/08	Wed 8/27/08	4
5	25%	WF,DD	Task 2	Wed 8/27/08	Thu 8/28/08	5
6	25%	CD,EL,CW	Task 3	Thu 8/28/08	Thu 9/4/08	6

Microsoft Project File

Original Presentation Schedule

The Milestones presentation chart to the right was created from the Microsoft Project file above.

Milestones Presentation Chart

Refresh Process

	% Complete	Resource Initials	Task Name	Start	
1	100%	JJ	Task A	Fri 8/15/08	Wed 8/20/08	1
2	100%	CW	Task B	Thu 8/21/08	Fri 8/22/08	2
3	41%	DD	Task C	Mon 8/25/08	Mon 9/1/08	3
4	26%	AW	Task D	Tue 8/26/08		4
5	50%	WF,DD	Task E	Wed 9/3/08		5
6	100%	CD,EL,CW	Task F	Thu 9/11/08		6

Microsoft Project File Revised

Milestones Presentation Chart

When the Microsoft Project Schedule changes, choose **Refresh Previously Imported** Project on the Connections tab. Dates, and % complete are updated, along with other task name, and resource initials (shown as symbol text) in the Milestones presentation chart.

For more information about Milestones Professional 2015 and Microsoft Project choose **Help Topics** on the **Help** tab and view the **Work with Microsoft Project** book in the Table of Contents.

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Build it your way "Free Form" Presentation Schedules
Link it to Microsoft Project schedules and keep it updated

Do you have a unique presentation format? Do you have one or more Microsoft Project schedules which you need to present at once?

It's possible to design a presentation chart "free-form" and link it to your Microsoft Project schedule(s) for future updates.

Schedules like the one below, sometimes called visual roadmaps can be built freeform. The process involves adding dates (symbols) to the presentation Milestones schedule, and then "tagging" symbols with the Microsoft Project Unique ID (or other identifier field) followed by the name of the date field and the name of the field to be used for symbol text. Once built and tagged, you can use Milestones re-fresh to keep your schedule up-to-date whenever your Microsoft Project schedule changes.

A symbol is "tagged" with the unique identifier, Microsoft Project date field and optional text and note fields.

Manually tagging a milestone chart is easy using the right click menu option **Link to active MS Project Task**. Once the **Link to active MS Project Task** feature has been used, Milestones will retain the previous settings chosen (the date field and the ID for tag) and allow you to link symbols similarly. The option below **Link to active MS Project Task** retains the last link options chosen.

For more information about Milestones Professional 2015 and Microsoft Project
choose **Help Topics** on the **Help** tab and
view the **Work with Microsoft Project** book in the Table of Contents.

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Update from multiple Microsoft Project schedules
Use simple file nicknames

If you have a list of Microsoft Project schedules which refresh a single Milestones Professional **2015** schedule, here's a great way to keep them up to date:

- In Milestones Professional 2015, add Microsoft Project schedules to a "refresh list". Assign each Project schedule a "nickname."

- Build the Milestones Professional schedule using the nicknames for symbols on the schedule.

- When the Milestones Professional schedule is refreshed, the refresh list is used to update the schedule.

Note that in version 2012, updating from multiple files requires the use of a Microsoft Project Text field instead of the nickname. Also, in 2012, instead of using the refresh list (added in 2015), you would use the Milestones Professional schedule's *master schedule list* instead.

Notes:

- Schedules can be maintained by multiple individuals and brought together by someone who would only need "read-only" access to create the presentation chart.

- Control over numbering scheme assures guaranteed unique numbering.

> For more information about Milestones Professional 2015 and Microsoft Project
> choose **Help Topics** on the **Help** tab and
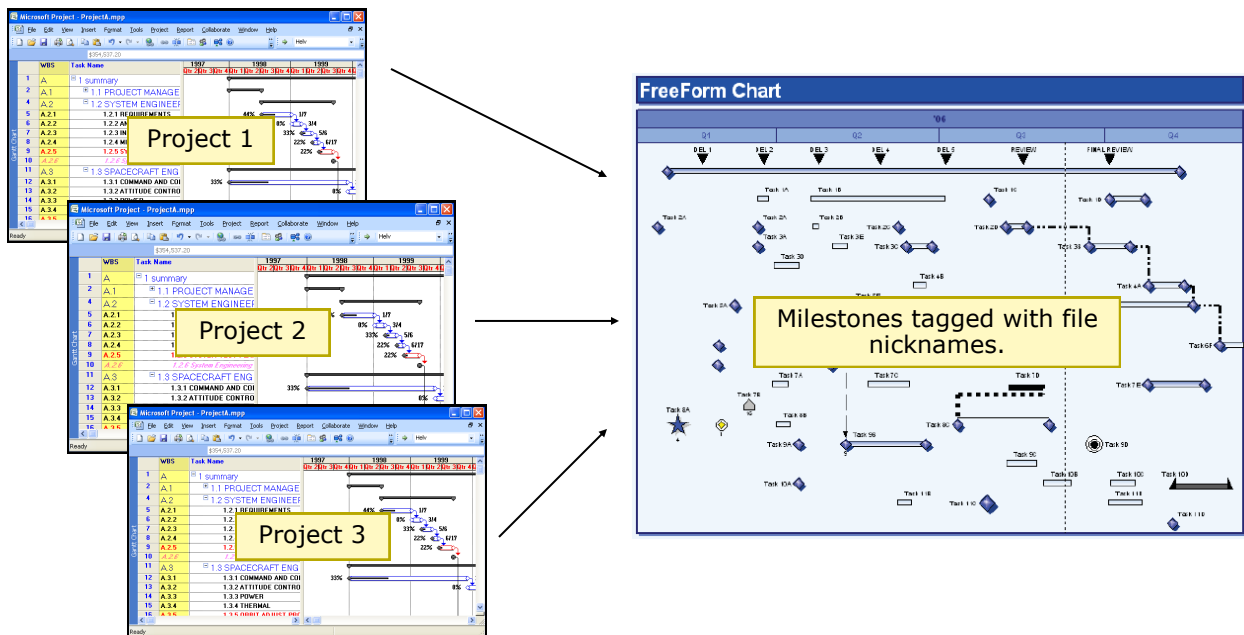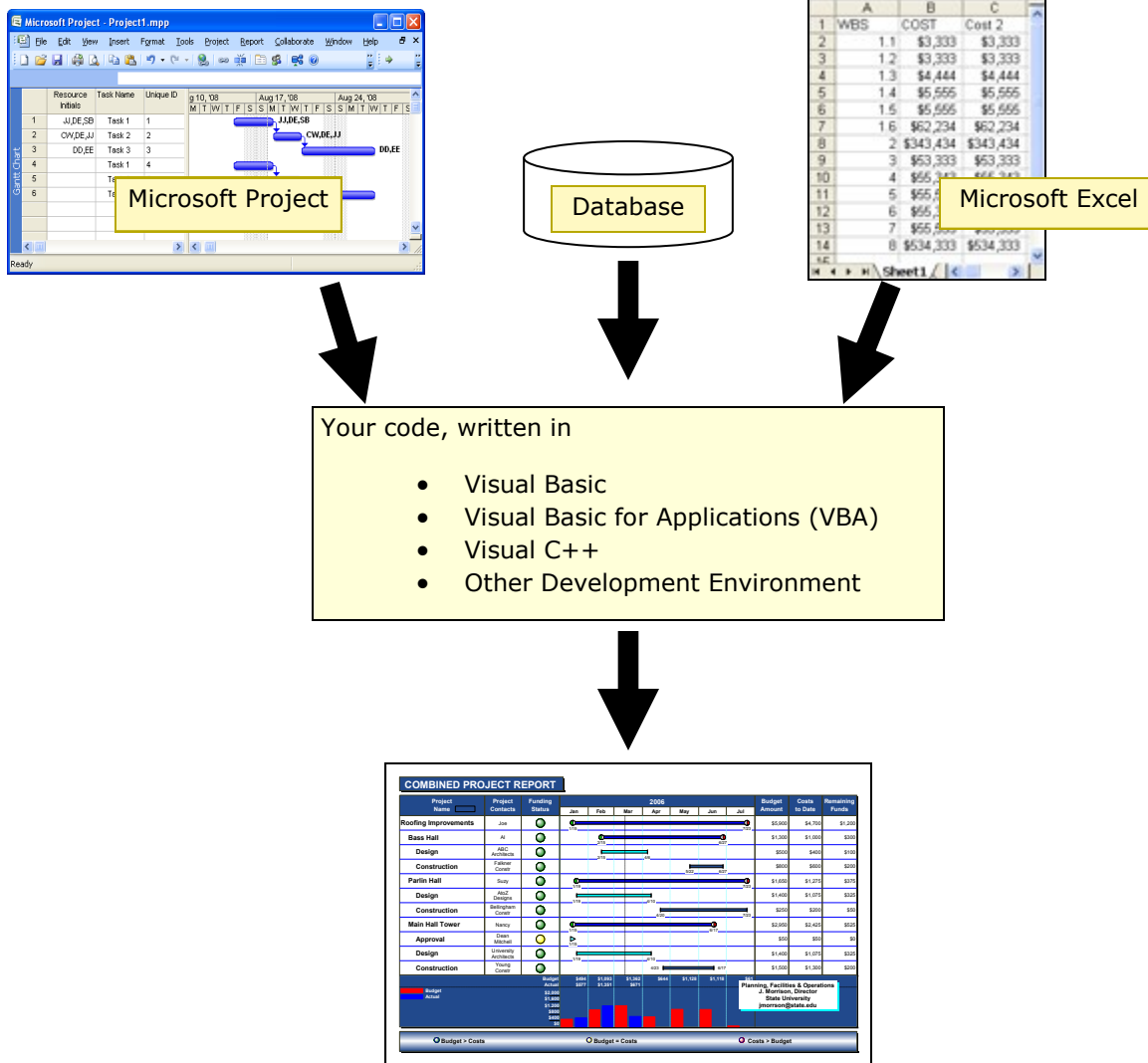> view the **Work with Microsoft Project** book in the Table of Contents.

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Build Applications With Milestones Professional
Milestones Professional's Automation Interface

Using OLE Automation, a program that you develop in Visual Basic can be used to automate schedule production using data from any source to which you have access.

It's possible, for example, to combine information from Microsoft Project with information from your company's financial system and produce a presentation Milestones report which includes information from these sources. Complete information is available on KIDASA Software's website.
Visit: www.kidasa.com/information/programming.

Microsoft Project

Database

Microsoft Excel

Your code, written in

- Visual Basic
- Visual Basic for Applications (VBA)
- Visual C++
- Other Development Environment

LICENSING: Site and server licenses for Milestones Professional are available. Developers require only a single license for Milestones Professional.

Complete information is available on KIDASA Software's website.
Visit www.kidasa.com/information/programming.

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