

Tutorials

Lesson 8 - Symbol HyperLinks and Symbol Links

In this lesson you will learn how to:

- Hyperlink a symbol to another schedule.
- Activate a schedule that has been linked.
- Remove a symbol's hyperlink.
- Hyperlink a symbol to a web page.
- Activate a linked URL.
- Hyperlink a file or URL to a task row.
- Remove a task row's Hyperlink.
- Add a symbol link between schedules.

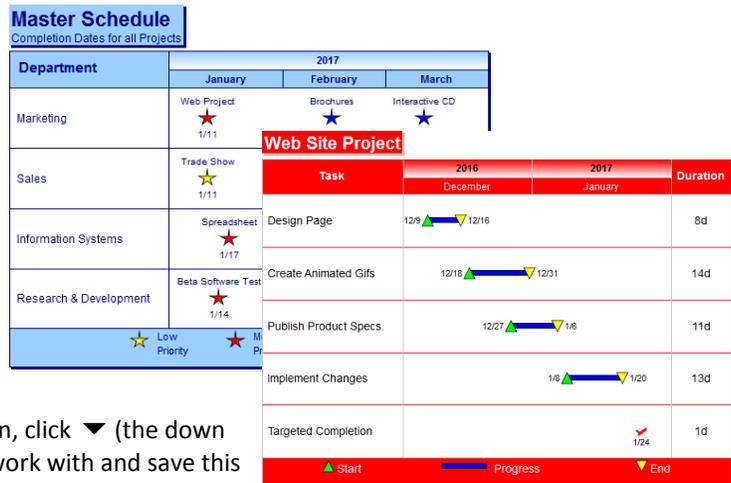
If you manage multiple schedules, you will find Milestones Professional's Hyperlinks feature very valuable. A Hyperlink is a link from any symbol or task row on the schedule to any other schedule, document, or web page. Dozens of Hyperlinks can be added to any symbol or task row.

In addition to Hyperlinks, Milestones supports "symbol links." With symbol links a symbol's date on one schedule can be based on a symbol's date on another schedule. (Symbol links can also be used to link symbols within a single schedule.)

Open the schedule for this lesson

This lesson will show you how to maintain a "hub" schedule that links to most aspects of a project's world.

1. On the toolbar choose the **File** tab.
2. In the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Open**.
3. Choose **Lesson Chart**.
4. Select **Lesson 8 Starter Schedule.mlf**.
5. Save the schedule to an accessible folder on your hard drive, such as your **Documents** folder. Choose **File**, in the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Save As ...** choose **Chart**. You can now work with and save this lesson schedule.
6. Follow the instructions above to open and save **Lesson 8 Web Site Project.mlf**. Do not close this file as you will need it later in the tutorial for symbol linking.
7. You will work back and forth between this schedule and the **Lesson 8 Starter Schedule**. Use the **View** tab to move back and forth between schedules.



Lesson 8 starter schedules

Hyperlink a symbol to another schedule

1. Choose the **View** tab. In the Windows Controls section, choose the ▼ next to Switch Windows and choose the **Lesson 8 Starter Schedule** to make it the active schedule.
2. Click  in the toolbox.
3. Click the **Web Project** symbol in the **Marketing** task row. The toolbar will change to the **Selection** tab with **Current Object: Symbol**. Choose the **Hyperlinks** tab.
4. In the **Hyperlink Display** section **Highlight Symbols With Hyperlinks**.
5. Click the **Add File** button. The **Select the Document File to Link** dialog box displays.
6. Locate your saved **Lesson 8 Web Site Project.mlf** and select it.
7. Notice that the symbol for **Web Project** has changed. It now has the **Hyperlink** notation.

Web Project



Hyperlink notation

Activate a schedule which has been Hyperlinked to a symbol

1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. Right-click on the **Web Project** symbol with the Hyperlink notation. This brings up the right-click menu.
3. In the menu find **Hyperlink: (with the file name)** and click on it. This opens the **Lesson 8 Web Site Project.mlf** schedule.

Remove a symbol's Hyperlink

1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. In the **Marketing** task row click the **Web Project** symbol. The toolbar will change to the **Selection** tab with **Current Object: Symbol**. Choose the **Hyperlinks** tab.
3. Click  (the **Break Link** button) to remove the link. Now the **Web Project** symbol does not have the **Hyperlink** notation any longer.

Hyperlink a symbol to a web page

It's just as easy to hyperlink a symbol to a web site on the Internet or your company's internal Intranet.

1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. Click  in the toolbox.
3. In the **Marketing** task row click the **Web Project** symbol. The toolbar will change to the **Selection** tab with **Current Object: Symbol**. Choose the **Hyperlinks** tab.
4. Click **Add URL** button. This brings up the **Add Internet or Intranet URL** dialog box.
5. In the blank space provided, type in **http://www.kidasa.com**
6. Click **OK** to exit the **Add Internet or Intranet URL** dialog box.



Add Internet or Intranet URL Hyperlink

Activate a Hyperlinked URL

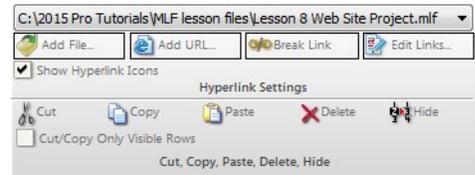
Now, visit KIDASA's web site by activating the Hyperlink which was just set up.

1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. **Right-click** the **Web Project** symbol. This brings up the right click menu.
3. Click **Hyperlink: http://www.kidasa.com**.

If an Internet browser is installed on your computer, it will be started take you to KIDASA Software's home page.

Hyperlink a file or URL to a task row

1. The **Lesson 8 Starter Schedule** should still be the active schedule. (If not, use **Switch Windows** on the **View** tab.)
2. Click  in the toolbox.
3. Click the **Marketing** task row. The entire row will highlight. The toolbar will change to the **Selection** tab with **Current Object: Task Row**.
4. In the **Hyperlink Settings** section, **Show Hyperlink Icons**.
5. In the **Hyperlink Settings** section, choose **Add File** to see the **Select the Document File to Link** dialog box.
6. Locate where you saved **Lesson 8 Web Site Project.mlf** and select it.
7. Choose **Add URL**. This brings up the **Add Internet or Intranet URL** dialog box.
8. Type in **http://www.kidasa.com** and press **OK**. The URL will show up in the **Hyperlinks** list.
9.  (The **Hyperlink** icon) is now displayed in the task row.



Add Hyperlink to a task row

Activate a schedule or URL that has been Hyperlinked to a task row

1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. Click  in the toolbox.
3. Click  (the **Hyperlink** icon) in the task row to view the **Select Hyperlink to Launch** dialog box.
4. Choose **Lesson 8 Web Site Project**. Click **OK**. This launches the **Lesson 8 Web Site Project** schedule.

Remove a Hyperlink from a task row

1. Choose the view tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. Click  in the toolbox.
3. Click the **Marketing** task row. The toolbar will change to the **Selection** tab with **Current Object: Task Row**. In the **Hyperlink Settings** section choose the **Hyperlink** to remove.
4. Click  (the **Break Link** button) twice to remove the 2 links which were added.
5. When all links are removed  (the **Hyperlink** icon) will no longer appear in the task row.

Hyperlinks can even be used over a network, making coordinating schedules with other project managers in an organization easier than ever. If their schedule files are accessible to you via your company's network, you can link their schedules to a symbol or task row on any of your schedules and bring up the latest update with just a click of the mouse. (When setting up the link, just locate the network file you want to link.)

Add a symbol link between schedules

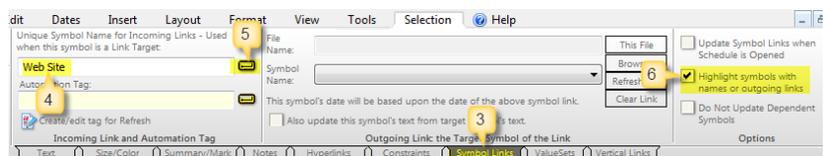
Name the Target Symbol

The date of this target symbol will drive the date of any symbol whose outgoing link points to this target symbol.

1. Use **View | Switch Windows** to make **Lesson 8 Web Site Project** the active schedule.
2. Click on the red checkmark dated **1/24** in the task row **Targeted Completion**.
3. The toolbar will change to the **Selection** tab with **Current Object: Symbol**. Choose the small **Symbol Links** tab.
4. In the top blank (white) space in the **Incoming Links and Automation Tag** section, type in **Web Site**.
5. Press  (the apply button).
6. Choose **Highlight symbols with names or outgoing links**: This attaches an icon to all symbols involved in symbol linking.
7. Save **Lesson 8 Web Site Project**. (Important!)



Target name symbol link icon



Name The Target Symbol

Establish the link

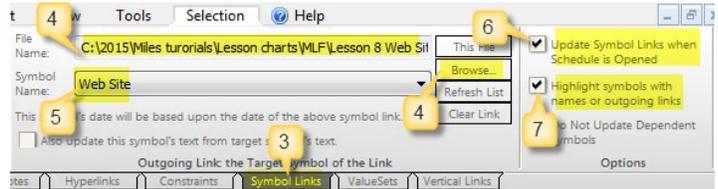
1. Use the **View** tab to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. In the **Marketing** task row click the **Web Project** symbol.
3. The toolbar will change to the **Selection** tab with **Current Object: Symbol**. Choose the **Symbol Links** tab.
4. In the **Outgoing Link: the Target Symbol of the Link** section, choose the **Browse** button. Browse to where you saved the **Lesson 8 Web Site Project.mlf** and select it. The file path will now appear in the **File Name** box.
5. In the **Symbol Name** box click the scroll arrow and choose **Web Site**. (Choose **Refresh** if no names appear.)
6. Choose **Update Symbol Links when Schedule is Opened**. Now, when a schedule with outgoing links is opened, those links are automatically updated with the latest target symbol dates.
7. **Highlight symbols with names or outgoing links:** This attaches an icon to all symbols involved in symbol linking.

Web Project



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Outgoing symbol link icon



Outgoing link

Update the link

1. Use **View | Switch Windows** to select **Lesson 8 Starter Schedule** to make it the active schedule.
2. Choose the **File** tab.
3. In the **Master/Update** section choose **Update Master Schedule, Linked Symbols**.
4. Choose **Linked Symbols**.
5. The **Symbol Links Update Results** dialog box appears.
6. Press **Ok** to close the box. The symbol is now updated to the target symbol's date.

In the **Symbol Links Update Results** dialog box all successfully updated symbols will have an **Updated Successfully** notation next to the target name.

Master Schedule

Completion Dates for all Projects

Department	2017		
	January	February	March
Marketing	Web Project ★ 1/24	Brochures ★ 2/14	Interactive CD ★ 3/11
Sales	Trade Show ★ 1/11	Client Presentation ★ 2/10	Training ★ 3/7
Information Systems	Spreadsheet ★ 1/17	Upgrades ★ 2/12	Software Purchases ★ 3/13
Research & Development	Beta Software Test ★ 1/14	Bug Fixes ★ 2/8	Beta Survey ★ 3/10
★ Low Priority ★ Medium Priority ★ Critical Priority			

Schedule with updated symbol