

Tutorials

Lesson 9 - Make a Schedule from a Spreadsheet

In this lesson you will learn how to:

- Import from the clipboard using Smart Import.
- Copy information from a spreadsheet program into Milestones Professional.
- Map the spreadsheet data to specified areas in Milestones Professional.

Smart import from clipboard

Importing into Milestones Professional template from a spreadsheet is made easier with Smart Import From Clipboard.

1. Set up your spreadsheet to have its column headings match Milestone Professional template's column headings.
2. Choose the **Date** tabs. Choose the calendar icons next to **Displayed Start Date** and **Displayed End Date**. Set the dates to the date range of the spreadsheet tasks.
3. Choose **Select All** in the spreadsheet.
4. Choose **Copy**.
5. Then go back to Milestones Professional and choose: **File | Import Options | Custom | Smart Import from Clipboard**. Milestones Professional Template will then be populated with the spreadsheet information.

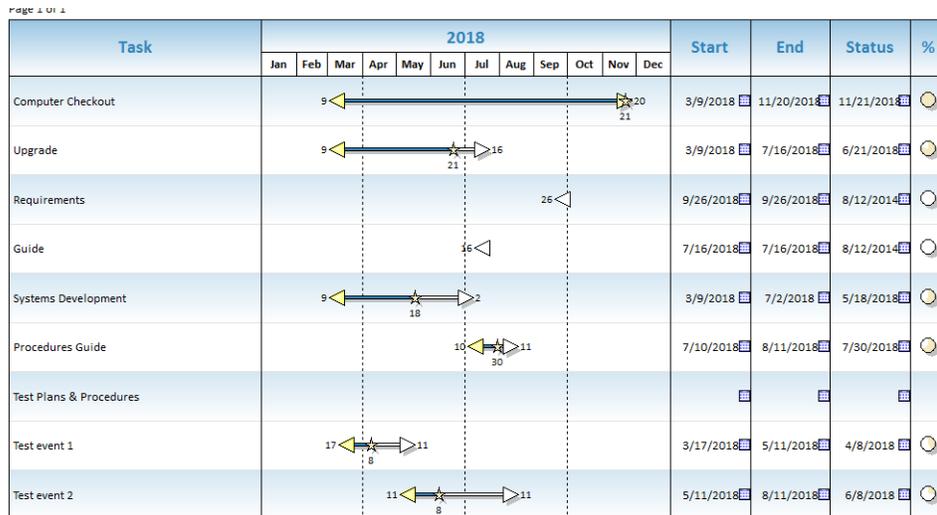
Page 1 of 1

Task	2018												Start	End	Status	%
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec				

Milestones' Template

	A	B	C	D
1 Task		Start	End	%
2 Computer Checkout		3/9/2018	11/20/2018	100
3 Upgrade		3/9/2018	7/16/2018	80
4 Requirements		9/26/2018		100

Spreadsheet information

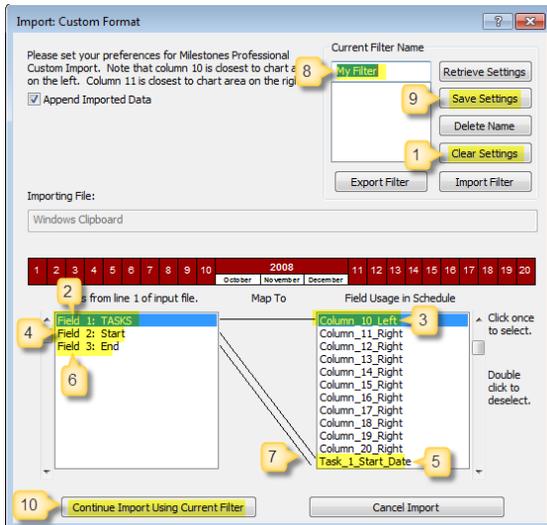


Milestones schedule generated from "Smart Import From Clipboard."

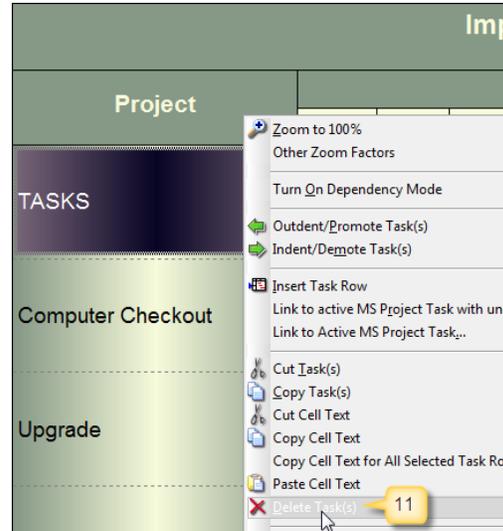
- To have percent complete be accurate, hourly minute detail must be turned on in Milestones. Choose the **Dates** tab. In the **Start and End Dates** section, choose **More Settings**. Click **Hourly /Minute**. both **Allow Hourly** and **Minute** detail.
- To have the task bars fill with color based on the percent complete, *fill to status* must be turned on. Choose the **Dates** tab. In the **Date Related Settings** section both **Symbols & Bars: Fill to Status Date**
- The 32nd symbol in the toolbox becomes the status symbol. Double click this symbol in the toolbox to change its properties.

Import the data from the clipboard into your Milestones Professional schedule (continued)

The numbers in the graphic below correspond to the next steps in this tutorial:



If filters need to be exchanged between colleagues use the **Export Filter /Import Filter** options.



1. Click the **Clear Settings** button. This will erase any previous filter settings (Map lines between fields).
2. Under **Fields from line 1 of input file**, click once on **Field 1: TASKS**.
“TASKS” is in the first cell in the first column of the spreadsheet. Field 1 includes all of the first column data, as represented by “TASKS”.
3. Under **Field Usage in Schedule**, click once on **Column_10_Left**.
This maps all information from the “TASKS” column in the spreadsheet to column 10 of the Milestones schedule. Column 10 is the column named “Project” in the Milestones file opened for this lesson. See page 9-4 of this tutorial for information regarding mapping to columns.
4. Under **Fields from line 1 of input file**, click once on **Field 2: Start**.
“Start” is in the first cell in the second column of the spreadsheet. Field 2 includes all of the second column data, as represented by “Start”.
5. Under **Field Usage in Schedule**, scroll and click once on **Task_1_Start_Date**.
This maps the dates in the “Start” column of the spreadsheet to import start date symbols in the schedule area
6. Under **Fields from line 1 of input file**, click once on **Field 3: End**.
“End” is in the first cell in the third column of the spreadsheet. Field 3 includes all of the third column data, as represented by “End”.
7. Under **Field Usage in Schedule**, scroll and click once on **Task_1_End_Date**.
This maps the dates in the “End” column of the spreadsheet to import end date symbols with a connecting horizontal bar to the start date in the schedule area.
8. Under **Current Filter Name**, type **My Filter**.
9. Click the **Save Settings** button.
10. Click the **Continue Import Using Current Filter** button. The schedule now contains the imported tasks and dates from the spreadsheet.
11. The first row of the spreadsheet is imported into the first task row of the Milestones schedule. In this example (the first row was a title row and not needed in the schedule) you will see “TASKS”. Right click the word “TASKS” and choose **Delete Task**.

Import Lesson Example Spreadsheet													
Project	2018												
	Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec	
Computer Checkout			3/9	—————									11/20
Upgrade			3/9	—————				7/16					
Requirements									9/26				
Guide							7/16						
Systems Development			3/9	—————			7/2						
Procedures Guide							7/10	—————		8/11			
Test event 1			3/17	—————		5/11							

Schedule with imported data from a spreadsheet

Fields in the Map and how they translate into the Milestones Schedule

Column Custom Fields

When mapped into the following Milestones fields, information from a spreadsheet will display in a Milestones text column. Milestones Text columns just display text and do not populate the schedule or calculate values.

Column_1_Left	Column_11_Right
Column_2_Left	Column_12_Right
Column_3_Left	Column_13_Right
Column_4_Left	Column_14_Right
Column_5_Left	Column_15_Right
Column_6_Left	Column_16_Right
Column_7_Left	Column_17_Right
Column_8_Left	Column_18_Right
Column_9_Left	Column_19_Right
Column_10_Left	Column_20_Right

Milestones custom fields

Milestones allows 20 columns of information on a single schedule. (10 columns on either side of the schedule area.)

Columns 1-10 are on the left side of the schedule.

Columns 11-20 on the right side of the schedule.

Column numbering goes from left to right, therefore column number 1 is the 10th column away from the left side of the schedule area. Column 10 is next to the schedule area on the left side. On the right side, column 11 is the column next to the schedule area and column 20 is the tenth column away from the schedule area. *See picture.*

Left Side of Schedule Area										Right Side of Schedule Area																					
Import Lesson Example Spreadsheet																															
1	2	3	4	5	6	7	8	9	10	2018																					
										J	F	M	A	M	J	J	A	S	O	N	D	11	12	13	14	15	16	17	18	19	20
										Schedule Area																					

Milestones column layout

Task start and end date custom fields

When mapped into the following Milestones fields, date information from a spreadsheet will display symbols connected with a bar or just a symbol in a Milestones schedule.

Task_1_Start Date	Task_9_Start Date	Task_15_Start Date
Task_1_End Date	Task_9_End Date	Task_15_End Date
Task_2_Start Date	Task_10_Start Date	Task_16_Start Date
Task_2_End Date	Task_10_End Date	Task_16_End Date
Task_3_Start Date	Task_11_Start Date	Task_17_Start Date
Task_3_End Date	Task_11_End Date	Task_17_End Date
Task_4_Start Date	Task_12_Start Date	Task_18_Start Date
Task_4_End Date	Task_12_End Date	Task_18_End Date
	Task_13_Start Date	Task_19_Start Date
	Task_13_End Date	Task_19_End Date
	Task_14_Start Date	Task_20_Start Date
	Task_14_End Date	Task_20_End Date

Milestones Custom Fields

When dates from columns in a spreadsheet are mapped into a combination of Task_#_Start Date and Task_#_End Date fields (the # must be the same), a start symbol, a bar and an end symbol are added to the schedule. See picture.

Date information in a spreadsheet must be formatted as month/day/year.

Date information generates two symbols with a bar

When a date column from a spreadsheet is mapped to either the Task_#_Start Date or the Task_#_End field a single milestone will be added to the schedule. See picture.

Date information in a spreadsheet must be formatted as month/day/year.

Date information generates a symbol

When Milestones Professional imports from Excel it uses the symbols in the toolbox in a specific order. This order is left to right, top to bottom. If you skip a date field in the mapping, Milestones skips a symbol in the toolbox.

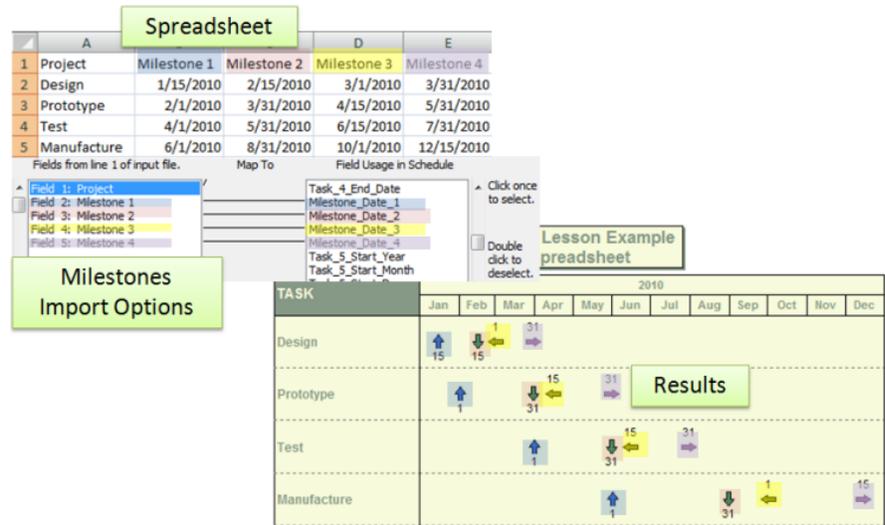
Task Milestone Date Custom Fields

When mapped into the following Milestones Custom Fields, date information from a spreadsheet will display individual symbols in a Milestones schedule.

Milestone_Date_1
 Milestone_Date_2
 Milestone_Date_3
 Milestone_Date_4

Milestones Custom Fields

Date information in a spreadsheet must be formatted as month/day/year.



Date information generates a symbol (milestone)

Task Date and Time Custom Fields

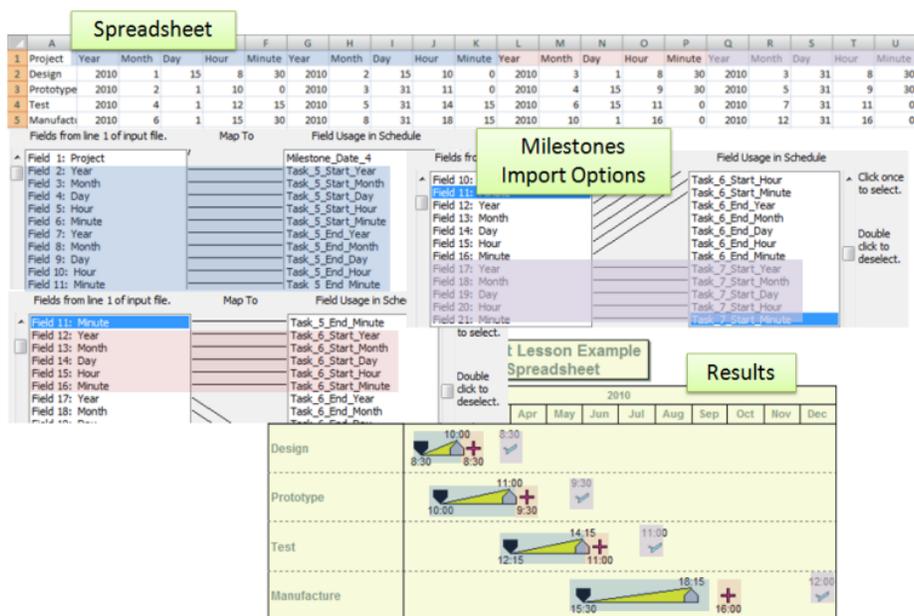
When mapped into the following Milestones Custom Fields, date and time information from a spreadsheet will display symbols connected with a bar or just a symbol in a Milestones schedule. These symbols will be placed on the schedule at the date and time as specified in the spreadsheet columns.

- | | | | |
|---------------------|---------------------|---------------------|---------------------|
| Task_5_Start_Year | Task_6_Start_Year | Task_7_Start_Year | Task_8_Start_Year |
| Task_5_Start_Month | Task_6_Start_Month | Task_7_Start_Month | Task_8_Start_Month |
| Task_5_Start_Day | Task_6_Start_Day | Task_7_Start_Day | Task_8_Start_Day |
| Task_5_Start_Hour | Task_6_Start_Hour | Task_7_Start_Hour | Task_8_Start_Hour |
| Task_5_Start_Minute | Task_6_Start_Minute | Task_7_Start_Minute | Task_8_Start_Minute |
| Task_5_End_Year | Task_6_End_Year | Task_7_End_Year | Task_8_End_Year |
| Task_5_End_Month | Task_6_End_Month | Task_7_End_Month | Task_8_End_Month |
| Task_5_End_Day | Task_6_End_Day | Task_7_End_Day | Task_8_End_Day |
| Task_5_End_Hour | Task_6_End_Hour | Task_7_End_Hour | Task_8_End_Hour |
| Task_5_End_Minute | Task_6_End_Minute | Task_7_End_Minute | Task_8_End_Minute |

Milestones custom fields

When date and time information from columns in a spreadsheet are mapped to a combination of **Task_#_Start, Year, Month, Day, Hour, Minute** and **Task_#_End, Year, Month, Day, Hour, Minute** (the # must be the same) a start symbol, a bar and an end symbol are added to the schedule. See picture.

If only mapped to either the **Task_#_Start, Year, Month, Day, Hour, Minute** or the **Task_#_End, Year, Month, Day, Hour, Minute** fields a single milestone will be added to the schedule. See picture.



Detailed date information generates a symbol, bar, symbol or just a symbol

Outline Level WBS Custom Field

When mapped into the following Milestones Custom Fields, Outline Level and WBS information from a spreadsheet will display outline levels & WBS levels in the Milestones schedule.

Outline_Level
WBS_Number
Milestones
Custom Fields

Outline Level example:

Map the outline level field from a spreadsheet to the Outline Level field in Milestones.

- Notice the Project column information in the Milestones schedule is indented based on the outline level. This indentation was set up in the Milestones schedule before importing. Using the **arrow** tool click on the column heading. The toolbar changes to the **Selection** tab with **Current Object: Column Heading**. Choose **Switch to Column**. Type in a value under **Indent per Outline Level**. Press the **apply** button. (Every column needs an indentation value if you want the column to be indented based on the outline level.)
- You can map the Outline Level to a column or you can set up an Outline Level SmartColumn in Milestones before importing and have Milestones populate the column. The Lev. Column (an outline level SmartColumn) in the Milestones schedule was set up in Milestones prior to importing.
- To have summary bars generate in a Milestones schedule choose the **Layout** tab. In the **Other** section choose **Summary Bar Settings**. Under **When to Draw** choose **Always**.

Spreadsheet

Outline Level	task	Start	End
1	Project		
2	Computer Checkout	3/9/2010	11/20/2010
2	Upgrade	3/9/2010	7/16/2010
2	Requirements	9/26/2010	
2	Guide	7/16/2010	
2	Systems Development	3/9/2010	7/2/2010
2	Procedures Guide	9/10/2010	
2	Test Plans & Procedures	3/17/2010	8/11/2010
3	Test event 1	3/17/2010	5/11/2010

Milestones Import Options

Fields from line 1 of input file. Map To Field Usage in S

Field 1: Outline Level Outline_Level
Field 2: task WBS_Number
Field 3: Start Task_9_Start_Date
Field 4: End Task_9_End_Date

Smart Import from Clipboard Lesson Example

Lev	Project	Start Date	End Date	2010
1	Project	3/9/10	11/20/10	
2	Computer Checkout	3/9/10	11/20/10	
2	Upgrade	3/9/10	7/16/10	
2	Requirements	9/26/10		
2	Guide	7/16/10		
2	Systems Development	3/9/10	7/2/10	
2	Procedures Guide	9/10/10		
2	Test Plans & Procedures	3/17/10	8/11/10	
3	Test event 1	3/17/10	5/11/10	
3	Test event 2	3/17/10	5/11/10	

Results

Outline Level Results

WBS Example:

WBS numbering works the same as the outlining import. Map the WBS field from the spreadsheet to the WBS field in Milestones. The column to be indented based on WBS must be set up with indentation in the Milestones file before importing. You can map the WBS numbering to a column or you can set up a WBS SmartColumn in Milestones before importing and have Milestones populate the column. In Milestones you have the option to select your WBS formatting.

Spreadsheet

WBS	task	Start	End
1	Project		
1.1	Computer Checkout	3/9/2010	11/20/2010
1.2	Upgrade	3/9/2010	7/16/2010
1.3	Requirements	9/26/2010	
1.4	Guide	7/16/2010	
1.5	Systems Development	3/9/2010	7/2/2010
1.6	Procedures Guide	9/10/2010	
1.7	Test Plans & Procedures	3/17/2010	8/11/2010
1.7.1	Test event 1	3/17/2010	5/11/2010
1.7.2	Test event 2	5/11/2010	8/11/2010

Milestones Import Options

Fields from line 1 of input file. Map To Field Usage in S

Field 1: WBS Outline_Level
Field 2: task WBS_Number
Field 3: Start Task_9_Start_Date
Field 4: End Task_10_Start_Date
Field 5: Task_10_Start_Date

Smart Import from Clipboard Lesson Example

WBS	Project	Start Date	End Date	2010
1	Project	3/9/10	11/20/10	
1.1	Computer Checkout	3/9/10	11/20/10	
1.2	Upgrade	3/9/10	7/16/10	
1.3	Requirements	9/26/10		
1.4	Guide	7/16/10		
1.5	Systems Development	3/9/10	7/2/10	
1.6	Procedures Guide	9/10/10		
1.7	Test Plans & Procedures	3/17/10	8/11/10	
1.7.1	Test event 1	3/17/10	5/11/10	
1.7.2	Test event 2	5/11/10	8/11/10	

Results

WBS Results

WBS Options

Starting WBS Number

Key the starting WBS number to be used on this chart. The default display is numeric for all 20 levels. If you wish some or all of the levels to be displayed using letters, then set the appropriate options in the Alphabetic Display section below:

Starting WBS Number:
Enter as numeric only.

Suppress display of First Level WBS Number

Alphabetic Display

Level: 1 2 3 4 5 6 7 8 9 10

Use Letters:

Upper Case:

Level: 11 12 13 14 15 16 17 18 19 20

Use Letters:

Upper Case:

OK Cancel

Successors Custom Field

When mapped into the following Milestones field, Successor information from a spreadsheet will display vertical links between tasks in the Milestones' schedule.

Successors

Milestones Custom Field

How to format successor information in the spreadsheet.

1. Click on the cell with in the successor column where the link is to start.
2. Next enter the task row number to where the link is going. **Note:** The first task row in spreadsheet is counted as 0.
3. Finally, enter the direction of the link. Choose from one of the following options: SF (Start to Finish) SS (Start to Start) FS (Finish to Start) FF (Finish to Finish).

Spreadsheet

Outline	Task	Start	End	Successors
1	Project			
2	Computer Checkout	3/9/2010	11/20/2010	
3	Upgrade	3/9/2010	7/16/2010	4fs
4	Requirements	9/26/2010		
5	Guide	7/16/2010		7ss
6	Systems Development	3/9/2010	7/2/2010	
7	Procedures Guide	9/10/2010		
8	Test Plans & Procedures	3/17/2010	8/11/2010	
9	Test event 1	3/17/2010	5/11/2010	
10	Test event 2	5/11/2010	8/11/2010	

Milestones Import Options

Results

Successors Results

Percent Complete Custom Field

When mapped into the following Milestones field, Percent Complete information from a spreadsheet will display the percent complete of a task by establishing a status symbol then filling the symbols and bars for a task with color.

Percent_Complete

Milestones Custom Field

- To have percent complete be accurate, hourly minute detail must be turned on in Milestones. Choose the **Dates** tab. In the **Start and End Dates** section, choose **More Settings**. Click **Hourly/Minute**. both **Allow Hourly** and **Minute** detail.
- To have the task bars fill with color based on the percent complete, you must have fill to status turned on. Choose the **Dates** tab. In the **Date Related Settings** section both **Symbols & Bars: Fill to Status Date**
- The 32nd symbol in the toolbox becomes the status symbol. Double click this symbol in the toolbox to change its properties.

Import Lesson Example Spreadsheet

Lev.	Project	Start Date	End Date	2010	% Comp.
1	Project	3/9/10	11/20/10	J F M A M J J A S O N D	72%
2	Computer Checkout	3/9/10	11/20/10		100%
3	Upgrade	3/9/10	7/16/10		100%
4	Requirements	9/26/10	11/20/10		75%
5	Guide	7/16/10	9/26/10		75%
6	Systems Development	3/9/10	7/2/10		50%
7	Procedures Guide	9/10/10	11/20/10		50%
8	Test Plans & Procedures	3/17/10	8/11/10		25%
9	Test event 1	3/17/10	5/11/10		25%
10	Test event 2	5/11/10	8/11/10		25%

Percent Complete Results

Duration Custom Field

When mapped into the following Milestones fields, Duration information from a spreadsheet will display a symbol, bar, symbol in the Milestones schedule.

Duration and Negative_Duration

- A positive duration value in the spreadsheet is used to generate a symbol, bar, symbol when the task's start date is available in the spreadsheet and imported.
- A negative duration value in the spreadsheet is used to generate a symbol, bar, symbol when the task's end date is available in the spreadsheet and imported.
- The Negative_Duration import field in the Milestones custom import is used only when a negative number can not be used.

Spreadsheet

Outline	Task	Start	End	Duration
1	Project			60
2	Computer Checkout	3/9/2010		60
3	Upgrade	3/9/2010		60
4	Requirements		11/20/2010	-30
5	Guide		9/26/2010	-30
6	Systems Development	3/9/2010		30
7	Procedures Guide	9/10/2010		60
8	Test Plans & Procedures			30
9	Test event 1		5/11/2010	-30
10	Test event 2		8/11/2010	-30

Milestones Import Options

Results

Duration Results