

Tutorials

Lesson 2- Add Tasks, Dates, and a Title to the Schedule

In this lesson you will learn how to:

- Enter project steps.
- Add symbols (milestones) and horizontal bars using the toolbox.
- Add and move a column.
- Add a schedule title.

Open and save the schedule for this lesson

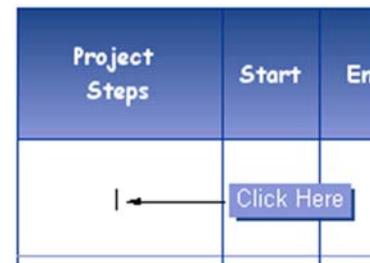
1. On the toolbar, choose **File**.
2. In the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Open**.
3. Choose **Lesson Chart**.
4. Select **Lesson 2 Starter Schedule.mlf**.
5. Choose **File**, in the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Save As ...** Choose **Chart**. Save the schedule to a folder on your computer, such as the **Documents** folder. You will now be able to work with and save this lesson schedule.

Project Steps	Start	End	August																			
			1	2	3	4	5	6	7	8	9	10	11									
			W	T	F	S	S	M	T	W	T	F	S									

Lesson 2 starter schedule

Enter the project steps

1. Click **T** in the toolbox.
2. In the first space below the column heading, **“Project Steps”**, click once.
3. Type in: **Get materials**. Press the down arrow on the keyboard. This moves the cursor to the next task row. (You can also click with your mouse within the cell of the next task row.)
4. Type in: **Tear off old roof**. Press the down arrow on the keyboard to move down to the next row.



Click here

Project Steps	Start	End	August																			
			1	2	3	4	5	6	7	8	9	10	11									
			W	T	F	S	S	M	T	W	T	F	S									
Get materials																						
Tear off old roof																						
Put down tar paper																						
Nail on shingles																						

Entered tasks

5. Type in: **Put down tar paper**. Press the down arrow on the keyboard to move down to the next row.
6. Type in: **Nail on shingles**.

Note: Pressing the down arrow while in the last row on a page may take you to a new (blank) page. If this happens, use the Page Up keyboard key to move back to Page 1 or delete the unwanted page by clicking on **Edit** tab. **Then**, in the **Delete** section choose **Current Page**.

Add symbols (milestones) and horizontal bars using the toolbox

Add a symbol, bar, symbol to the "Get materials" step

1. Click *once* on the **small plus** to the left of the first symbol, bar, symbol combination in the toolbox. The entire row will highlight as shown in the image labeled **Small Plus**:
2. Using the mouse, move the cursor into the schedule area to the right of **Get materials**, as shown in the **Cursor with date display** image:
3. Move the mouse to **Wednesday 8/1/18**. The date will show next to the cursor as the mouse moves. Then:



Small Plus

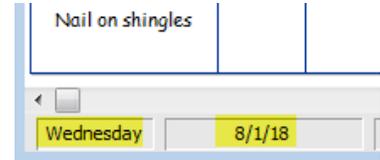
Project Steps	Start	End	August							
			1	2	3	4	5	6	7	
			W	T	F	S	S	M		
Get materials										

Cursor with date display

- A. Click (and hold) the left mouse button.
- B. Drag the mouse two days to the right until the cursor shows or the status bar shows **Friday 8/3/18**.
- C. Release the mouse button.

Project Steps	Start	End	August		
			1	2	3
			W	T	F
Get materials	8/1/18	8/3/18			

Added task bar



Status bar

Add two symbols with a bar to the "Tear off old roof" step

1. Using the mouse move the cursor into the schedule area directly to the right of **Tear off old roof**.
2. When the date displayed next to the cursor or in the status bar displays **Thursday 8/2/18**:
 - A. Click (and hold) with the left mouse button.
 - B. Drag the mouse to the right until the cursor shows or the status bar shows **Tuesday 8/7/18**.
 - C. Release the mouse button.

Project Steps	Start	End	August							
			1	2	3	4	5	6	7	
			W	T	F	S	S	M	T	
Get materials	8/1/18	8/3/18								
Tear off old roof	8/2/18	8/7/18								

Added task bar

Add a single milestone to the "Put down tar paper" step

1. Using the mouse move the cursor into the schedule area to the right of **Put down tar paper**.
2. Drag the mouse to the right until the cursor shows **8/8/18**. Click once to add a single milestone.

Project Steps	Start	End	August							
			1	2	3	4	5	6	7	8
			W	T	F	S	S	M	T	W
Get materials	8/1/18	8/3/18								
Tear off old roof	8/2/18	8/7/18								
Put down tar paper	8/8/18	8/8/18								

Added symbol (milestone)

Add two symbols with a bar to the "Nail on shingles" step

A different option for adding two symbols with a bar:

1. Select **T** in the toolbox.
2. Move the cursor to the **Start** column cell for **Nail on shingles**. Type in **8/9/18**.
3. Move the cursor to the **End** column cell for **Nail on shingles**. Type in **8/11/18**.



Calendar icon

Project Steps	Start	End	August										
			1	2	3	4	5	6	7	8	9	10	11
			W	T	F	S	S	M	T	W	T	F	S
Get materials	8/1/18	8/3/18											
Tear off old roof	8/2/18	8/7/18											
Put down tar paper	8/8/18	8/8/18											
Nail on shingles	8/9/18	8/11/18											

Add two symbols with a bar using the T tool.

Calendar icons can be used in the date columns to enter dates in the column's cells. To turn on calendar icons: **View | Optional Items | Show calendar icons in date columns.**

Add and move a column

Add a column

A duration SmartColumn automatically calculates and displays the duration of each task.

1. Choose the **Insert** tab.
2. In the **Rows, Columns** section choose **New Column**.
3. From the menu, choose **Duration**. The **Insert Duration Columns** dialog box displays. **Duration**, and then click **OK**.
4. The duration column will now be in your schedule.

Duration can be affected by the options **Allow Hourly Detail**, and **Allow Minute Detail**. To change these options choose the **Dates** tab. In the **Start and End Dates** section choose **More Settings**. On the drop down menu choose **Hourly/Minute**.

Project Steps	Start	End	Dur.	August																	
				1	2	3	4	5	6	7	8	9	10	11							
				W	T	F	S	S	M	T	W	T	F	S							
Get materials	8/1/18	8/3/18	3d																		
Tear off old roof	8/2/18	8/7/18	6d																		
Put down tar paper	8/8/18	8/8/18	1d																		
Nail on shingles	8/9/18	8/11/18	3d																		

Schedule with duration column

Move a column to a different location on the schedule

1. Click  in the toolbox.
2. Move the cursor to the top border of the column to be moved (the line just above **Dur.** in our example). The cursor should change to the **move column** cursor.
3. Click and hold the left mouse button and drag the column to the right side of the schedule until you see the **insertion marker** indicating where the column will be inserted.
4. Release the mouse to drop the column at the insertion point.



Move column cursor



Insertion marker

The examples below show moving a column from the left side of the schedule to the right side.

Project Steps	Start	End	Dur.	August																	
				1	2	3	4	5	6	7	8	9	10	11							
				W	T	F	S	S	M	T	W	T	F	S							
Get materials	8/1/18	8/3/18	3d																		
Tear off old roof	8/2/18	8/7/18	6d																		
Put down tar paper	8/8/18	8/8/18	1d																		
Nail on shingles	8/9/18	8/11/18	3d																		

Move column

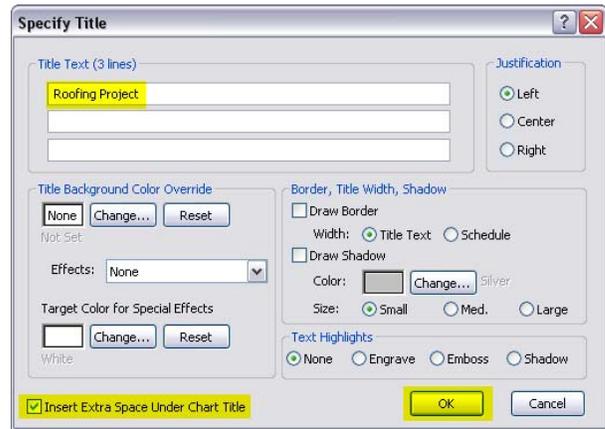
Project Steps	Start	End	Dur.	August											Dur.								
				1	2	3	4	5	6	7	8	9	10	11									
				W	T	F	S	S	M	T	W	T	F	S									
Get materials	8/1/18	8/3/18	3d																			3d	
Tear off old roof	8/2/18	8/7/18	6d																				6d
Put down tar paper	8/8/18	8/8/18	1d																				1d
Nail on shingles	8/9/18	8/11/18	3d																				3d

Insert column

Inserted duration column

Add a schedule title

1. Choose the **Insert** tab.
2. In the **Title** section click on **Insert/Edit Chart Title**. The **Specify Title** dialog box will display.
3. Type **Roofing Project** in the first blank space as shown.
4. **Insert Extra Space Under Chart Title**. Click **OK**.



Specify Title dialog box

Roofing Project

Project Steps	Start	End	August											Dur.	
			1	2	3	4	5	6	7	8	9	10	11		
			W	T	F	S	S	M	T	W	T	F	S		
Get materials	8/1/18	8/3/18	◆ 8/1 — 8/3 ◆												3d
Tear off old roof	8/2/18	8/7/18	◆ 8/2 — 8/7 ◆												6d
Put down tar paper	8/8/18	8/8/18							◆ 8/8 ◆						1d
Nail on shingles	8/9/18	8/11/18							◆ 8/9 — 8/11 ◆						3d

Lesson 2 completed schedule