

Milestones PROFESSIONAL[®]

Tutorials

Lesson 6 - Outline a schedule

In this lesson you will learn how to:

- Set up indenting for a column.
- Outline the steps in the project.
- Set summary bar options.
- Collapse and expand tasks.
- Organize the schedule using WBS numbering.

Open the schedule for this lesson

1. On the toolbar choose the **File** tab.
2. In the **Files and Templates: Open and Save Options** section, click ▼ (down arrow) next to **Open**.
3. Choose **Lesson Charts**.
4. Select **Lesson 6 Starter Schedule.mlg**.
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 ...** and choose **Chart**. You will now be able to work with and save this lesson schedule.

Swimming Pool Construction					
PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
301 Sunspot					1
Excavate					1
Plumbing					1
Pool Plumbing					1
Hook-up Water					1
Masonry					1
455 Tombstone					1
Excavate					1
Plumbing					1
Pool Plumbing					1
Hook-up Water					1
Masonry					1

Lesson 6 Starter Schedule

Set up Indenting for a column

The  Indent/Outdent tools icons make it easy to change the outline level of each task.

1. Click  (the **Arrow** tool) in the toolbox.
2. Click on the **PROJECTS** column heading. The toolbar will change to the **Selection** tab with **Current Object : Column Heading**.
3. Select **Switch to Column**.  Switch to Column
4. In the **Column Type and Format** section insert **0.2** in the **Indent per Outline Level**. Then click  to apply the change. The column will now be indented when outlined. Right now, there is no noticeable difference on the schedule as it has not yet been outlined.

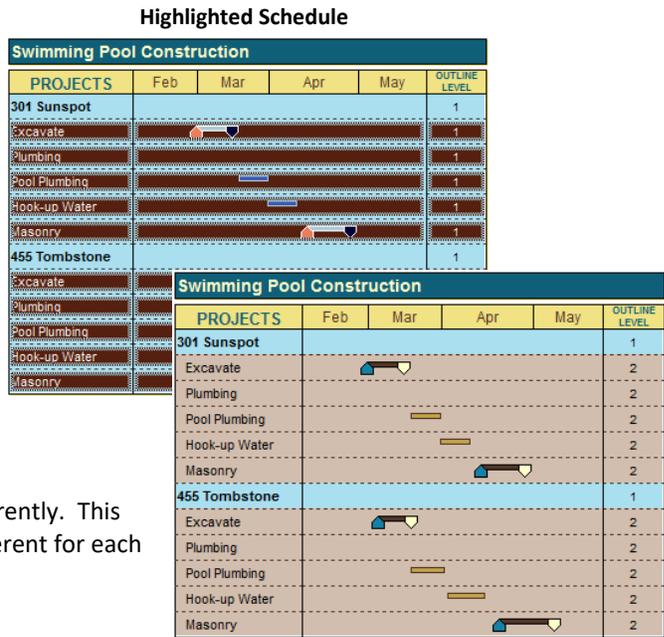
The keyboard **Tab** key can also be used for indenting, if it is set up. Choose the **Tools** tab. In the **Program Options** section choose **Edit**, and then **Use TAB key for Outlining**

Outline the steps in the project

Indent selected tasks from Outline Level 1 to 2.

Indent the project steps under each street address, changing their outline level from 1 to 2.

1. Click  (the **Arrow** tool) in the toolbox.
2. Holding the keyboard **Ctrl** key down, in the **PROJECT** column, click once on each of the project steps that is not an address. When selected, the task row will highlight and the toolbar will change to the **Selection** tab with **Current Object: Task Row**.
3. Click once on the  **indent icon** in the toolbar.
4. These steps are now at level 2.
5. Click within the schedule area to de-select the project steps.
6. Notice that the tasks which are now level 2 are shaded differently. This schedule is set up with outline shading (shading will be different for each outline level.)



Indented Schedule

Indent selected tasks from Outline Level 2 to 3.

1. Click  (the **Arrow** tool) in the toolbox.
2. Holding the **Ctrl** key down, click once on **Pool Plumbing** and once on **Hook-up Water** for each street address. When selected, the task row will highlight and the toolbar will change to the **Selection** tab with **Current Object: Task Row**.
3. Click once on the  **indent icon** on the toolbar.
4. These steps are now at level 3.
5. Click within the schedule area to de-select the project steps.



Indented Schedule

Some schedules (like this one) use outline level shading.

To change task row colors and attributes based on outline level, choose the **Format** tab. In the **Gridlines** section choose **Gridlines Shading, Font Sizes by Outline Level**.

Set summary bar options

Notice that on the level 1 and 2 tasks, no schedule information is drawn. This is because no schedule information was added for these tasks. Next, you will turn on “summary bars” so that Milestones will automatically draw schedule information for higher level tasks (summary tasks).

1. Click the **Layout** tab.
2. In the **Other** section choose **Summary Bar Settings**. The **Summary Bar Settings** dialog box will display.
3. Under **When to Draw**, click the **Always** option.

Swimming Pool Construction					
PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
301 Sunspot	←————→				1
Excavate	←	→			2
Plumbing		←	→		2
Pool Plumbing			←	→	3
Hook-up Water				←	3
Masonry				←	2
455 Tombstone	←————→				1
Excavate	←	→			2
Plumbing		←	→		2
Pool Plumbing			←	→	3
Hook-up Water				←	3
Masonry				←	2

Schedule with Summary Bars

Collapse and expand tasks

Turn on the Collapse/Expand Indicators

1. Click **View** tab.
2. In the **Optional Items** section check on **Collapse/Expand Indicators**.

Indicators will be displayed beside every summary task in the left column closest to the schedule area. These indicators can be used to collapse or expand tasks. The indicator is filled when lower level tasks are “rolled up” and hollow when lower level tasks are expanded.

Swimming Pool Construction			
PROJECTS	Feb	Mar	
301 Sunspot	←————→		▼
Excavate	←	→	
Plumbing		←	→
Pool Plumbing			←

Collapse/Expand Indicators

In **Tools | Program Options | General** change the look of the Collapse/Expand Indicators.

Collapse “301 Sunspot” using the Collapse/Expand Indicator

1. Click (the **Arrow** tool) in the toolbox.
2. Click the **Collapse/Expand Indicator to the right of 301 Sunspot**.

Collapse "Plumbing" under “455 Tombstone” using the right-click menu

1. Right-click once on the word **Plumbing**. A menu will display.
2. Choose **Collapse Selected Task Row**.

Expand all project steps at once

1. Click the **View** tab.
2. In the **Other** section choose **Show all Task Rows**.

Expand individual project steps

1. Right-click the task to be expanded
2. Choose **Expand Selected Task Row**.

	Show All Task Rows
	Collapse All Tasks to Selected Level
	Expand Selected Task Row
	Hide Task(s)

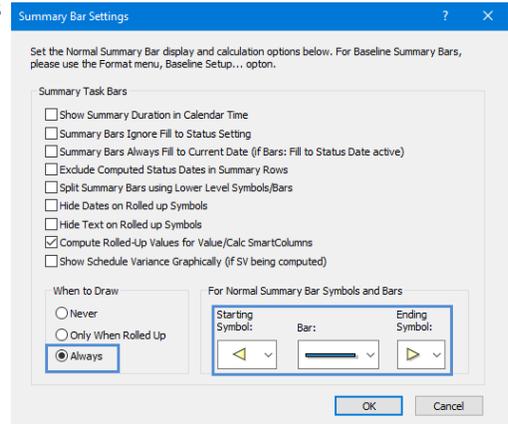
Right Click Menu

Right-click a task row for easy access to collapse and expand options.

Swimming Pool Construction					
PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
301 Sunspot	←————→				1
455 Tombstone	←————→				1
Excavate	←	→			2
Plumbing		←	→		2
Pool Plumbing			←	→	3
Hook-up Water				←	3
Masonry				←	2
455 Tombstone	←————→				1
Excavate	←	→			2
Plumbing		←	→		2
Pool Plumbing			←	→	3
Hook-up Water				←	3
Masonry				←	2

Collapsed and Expanded Schedules

Clicking within the schedule area de-selects any project steps which remain highlighted.



Summary Bar Setting Dialog Box

4. Under **For Normal Summary Bar Symbols and Bars**, scroll to choose the **Starting Symbol**, **Bar** and **Ending Symbol** as show above.
5. Click **OK**. Now the bars and symbols set up in step 4 have been added to the **summary rows** on the schedule.

Organizing a schedule using WBS numbering

A WBS (Work Breakdown Structure) SmartColumn displays the outline level as 1, 1.1, 1.1.1,... instead of the Outline Level SmartColumn levels of 1, 2, 3,... A WBS number combines the task number and outline level into one number. Task 1 would have WBS number "1", Sub-task 1 of Task 1 would have WBS number "1.1", Sub-task 2 of Task 1 would have "1.2", and so on. Other options for WBS numbering are also available but for this lesson you will stick with the default.

1. Click  (the **Arrow** tool) in the toolbox.
2. Move the cursor to the column heading **PROJECTS** and just below the word **PROJECTS**.
3. When the cursor changes to  column selection icon click once to highlight the column.
4. Click the **Insert** tab.
5. In the **Rows, Columns** section choose **New Column**.
6. From the menu choose **WBS Number**. The **Starting WBS Number** dialog box displays.
7. In the **Starting WBS Number** dialog box, for the **Starting WBS Number** enter **1**.
8. Click **OK** and **OK**.

Swimming Pool Construction						
WBS	PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
1	301 Sunspot					1
1.1	Excavate					2
1.2	Plumbing					2
1.2.1	Pool Plumbing					3
1.2.2	Hook-up Water					3
1.3	Masonry					2
2	455 Tombstone					1
2.1	Excavate					2
2.2	Plumbing					2
2.2.1	Pool Plumbing					3
2.2.2	Hook-up Water					3
2.3	Masonry					2

Schedule with WBS Column