

Milestones PROFESSIONAL[®] TUTORIALS

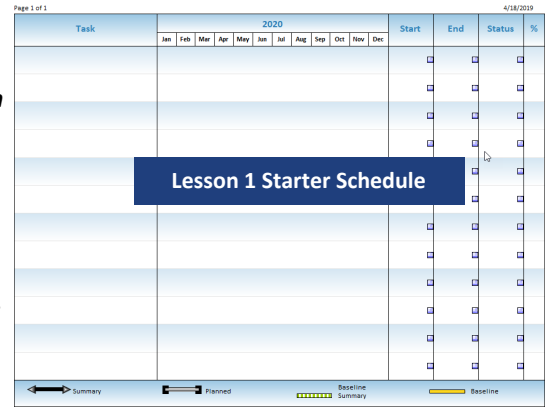
Lesson 1 - Format a Schedule

In this lesson you will learn how to:

- Change the schedule's date range
- Change the schedule's date headings
- Change the schedule's dimensions
- Change the legend and add a new legend entry
- Work with pages and page numbers
- Work with the schedule's current date
- Change the schedule's horizontal gridlines and shading
- Change the schedule's vertical gridlines

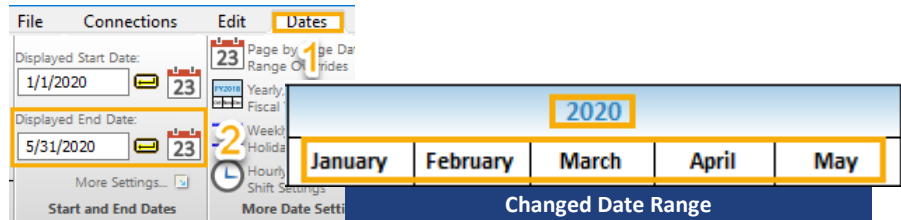
Open the schedule for this Lesson

1. On the toolbar, choose **File**.
2. In the **Files and Templates: Open and Save Options** section select **Open Samples or Lesson**. The **Open a Sample Chart** dialog displays.
3. Under **Select a Folder below to Open** and select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 01 Starter Schedule.mlj**.
5. Save the schedule to an accessible folder on your computer. On the **File** tab, in the **Files and Templates: Open and Save Options** section, choose **Save As....** In the menu that displays choose **Chart**. Name, then save the schedule.



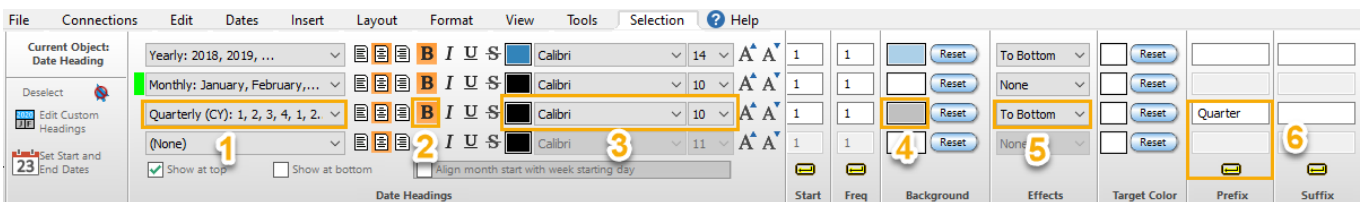
Change the schedule's date range.

1. Choose the **Dates** tab.
2. In the **Start and End Dates** section, use the **Calendar** icon to change the **Displayed End Date** to **5/31/2020**.

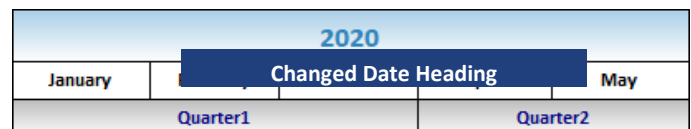


Change the schedule's date headings

At the top of the schedule click on the month date heading. It will highlight in black and white and the toolbar will change to the **Selection** tab with **Current Object: Date Heading**. This contains all date heading options. Follow the numbered steps below to add a third date heading and set its properties.

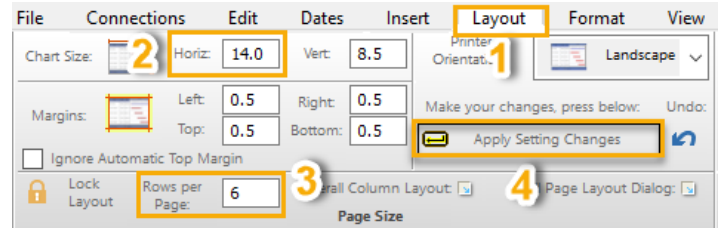


1. In the **Date Headings** section, in the third slot, choose **Quarterly (CY): 1,2,3,4,1,2**.
2. Also in the third slot, select the **(B) Bold** icon.
3. Click the color swatch to change the font color to **Navy** or your color choice. Change the font size to **10**.
4. In the **Background** section, click the color swatch and change to **Silver** or your color choice.
5. In the **Effects** section, choose **To Bottom**. Effects create a gradient from the Background color to the Target Color.
6. In the **Prefix** section, type in **Quarter** and press the **apply** button. The word **Quarter** is added in front of the quarterly number. (Prefix and suffix options are available with most date headings.)



Change the schedule's dimensions

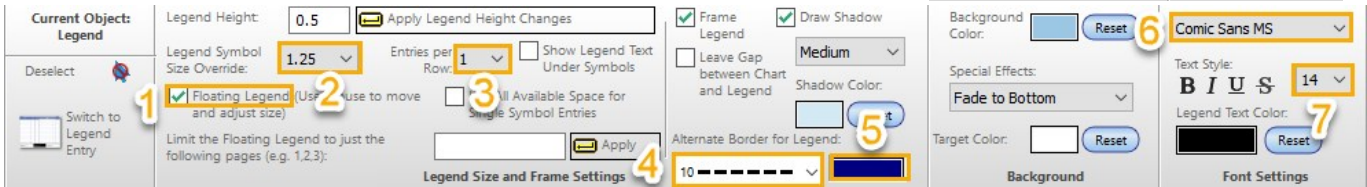
1. Choose the **Layout** tab.
2. In the **Page Size** section, change the **Horiz.** value to **14**.
3. Change the **Rows per Page** to **6**.
4. Press (**Apply Setting Changes**.) The schedule is now wider and has fewer lines.



Change the legend properties and add a new legend entry

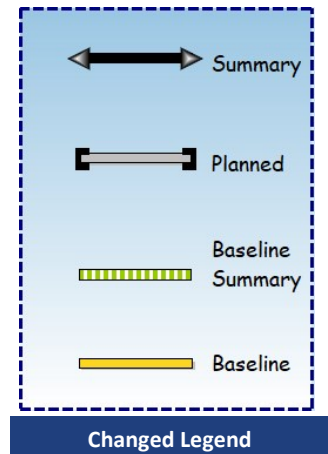
Change legend properties

1. Choose the **Layout** tab.
2. In the **Legend Size** section, click on the **Full Legend Settings**. The toolbar changes to the **Selection** tab **Current Object: Legend** which contains all legend options. Follow the numbers to change the legend properties.



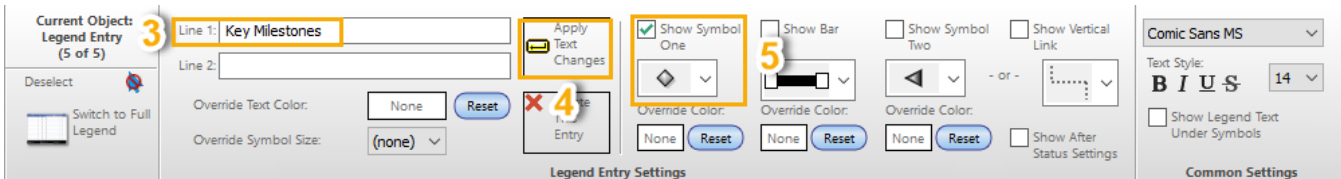
In the **Legend Size and Frame Settings** section:

1. Check on **Floating Legend**.
2. For **Legend Symbol Size Override**, choose **1.25**.
3. Change **Entries per Row** to **1**.
4. Select option **10** for **Alternate Border for Legend**.
5. Choose the color swatch and change to **Navy** or your color choice.
6. In the **Font Settings** section:
6. Change the font style to **Comic Sans MS** or your font style choice.
7. Change the text size to **14**.
8. Click the corners of the legend and drag to adjust its size.
9. Click on the legend and drag the legend to move it to another location on the schedule.

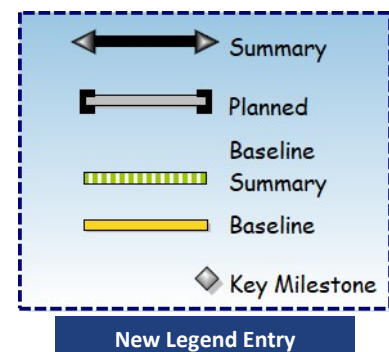


Add a new Legend Entry

1. Click the **Insert** tab.
2. In the **Picture, Legend** section choose **New Legend Entry**. The toolbar changes to the **Selection** tab **Current Object Legend Entry** which contains all options for that legend entry. Follow the numbers to add a legend entry.



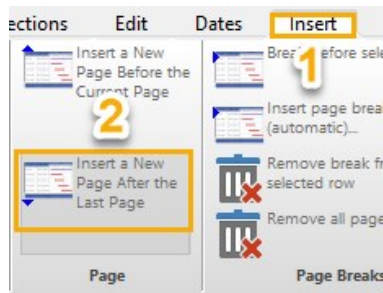
3. For **Line1**, enter **Key Milestone**.
4. Press **Apply Text Changes**.
5. Check on **Show Symbol One**. Then, select the drop down and choose the first diamond symbol in the list.
6. Click the corners of the legend and drag to adjust its size.



Work with pages and page numbers

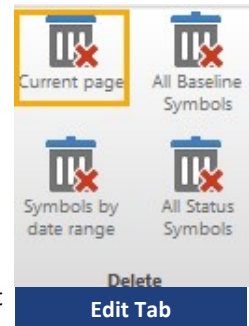
Insert a page

1. Choose the **Insert** tab.
2. In the **Page** section choose to **Insert a New Page after the Last Page**. The schedule now has two pages.



Delete the page which was just added

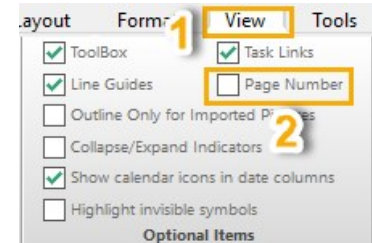
1. Look at the top left corner of the schedule. It will say **Page 1 of 2** or **Page 2 of 2**.
2. If it says Page 1 of 2, use the keyboard's Page Down(PgDn) key to move to page 2.
3. Once on page 2, choose the **Edit** tab.
4. In the **Delete** section choose the **X** for **Current page**. The schedule now has just one page again.



Remove page numbers

The page number displays in the top left corner above the schedule.

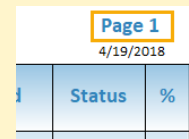
1. Choose the **View** tab.
2. In the **Optional Items** section, uncheck **Page Number** to remove page numbers.



Add page numbers

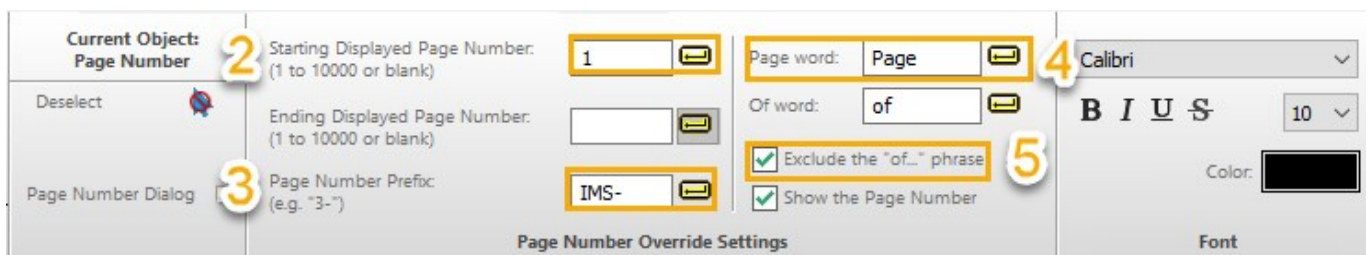
1. Choose the **View** tab.
2. In the **Optional Items** section, check on **Page Number** to make page numbers visible again.

In a future lesson you will learn about **freeform text**. With freeform text, it's possible to put the page number anywhere on the schedule using **substitutable text**, like **&curpage**. In the toolbox, select the (T) **Text** tool. On any empty part of the schedule's page, type: **Page &curpage**. Learn more about **Substitutable Text** under the **Help** tab **Help Topics**.



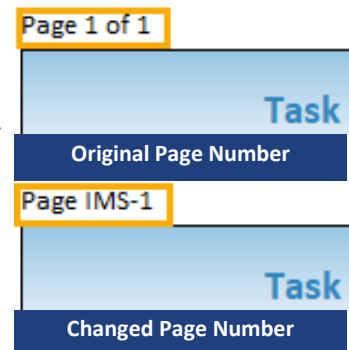
Change the page number properties

1. In the toolbox, select the (↶) **Arrow** tool to click on the page number. The toolbar changes to the **Selection** tab **Current Object: Page Number** which contains all option for the page number. Follow the numbers to change the page number properties.



In the **Page Number Override Settings** section

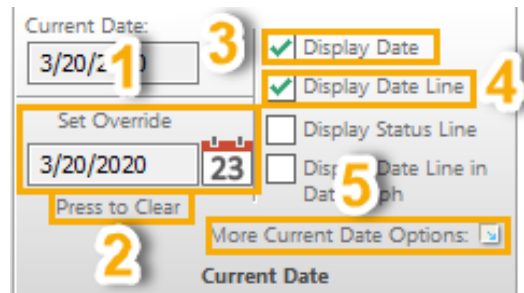
2. For **Starting Displayed Page Number** type in **1**. Press to apply the change.
3. For **Page Number Prefix** type in **IMS-**. Press to apply the change.
4. For **Page word**, **Page** by default is already typed in, if not type in **Page**. Press to apply the change.
5. Check on **Exclude the "of_" phrase**.



Quickly hide page numbers and change page number properties by right-clicking the page number on the schedule and making a selection from the menu.

Work with the schedule's current date

By default Milestones uses the current date from your computer. The **Dates** tab is used to change date options.



Override the current date

1. Click the **Dates** tab. In the **Current Date** section click the calendar icon for **Set Override**. Set the date to **March 20, 2020**.
2. The override can be removed by clicking **Press to Clear**.

Show the current date

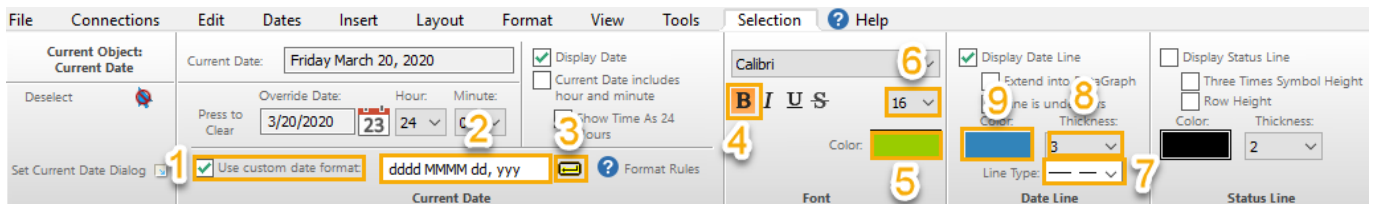
3. In the **Current Date** section, check on **Display Date** to show the current date in the top right of the schedule.

Show the current date line

4. In the **Current Date** section, check on **Display Date Line** to add the current date line.

Change current date properties

5. In the **Current Date** section, select **More Current Date Options**. The toolbar will change to the **Selection** tab **Current Object: Current Date** which contains all current date options. Follow the numbers to change the current date properties.



In the **Current Date** section:

1. Check on **Use custom date format**.
2. Enter the following:
dddd MMMM dd, yyy

Select the **Format Rules** icon to view codes to change the date format.

3. Press **Apply** to apply the changes.

In the **Font** section:

4. Select the **(B) Bold** icon
5. Set **Color** to **Green** or your color choice.
6. Set the font size to **16**.

In the **Date Line** section:

7. For **Line Type**, choose the drop down, then select the first long dash option in the list.
8. For **Thickness**, choose the drop down, then select **3** in the list.
9. For **Color** choose **Blue** or your color choice.

Wednesday Mar. 18, 2020

2020			Start	End	Status	%
March	April	May				
Quarter2						
Current Date and Current Date Line Display						

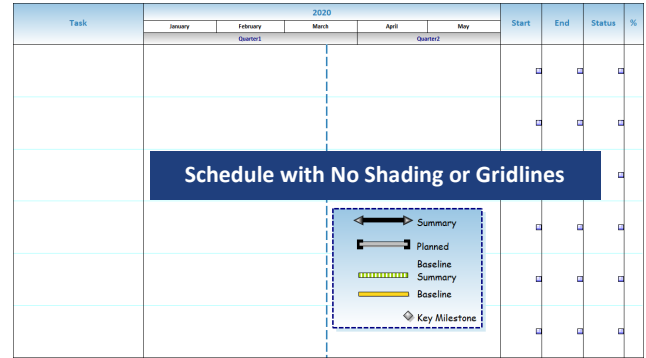
More about Current date:

- To change the Current Date and Date Line properties click the current date text on the schedule. The toolbar will present the current date and current date line properties.
- On the schedule, right-click the current date to hide the date or date line and change their properties.

Change the schedule's horizontal gridlines and shading

Change the gridlines and shading

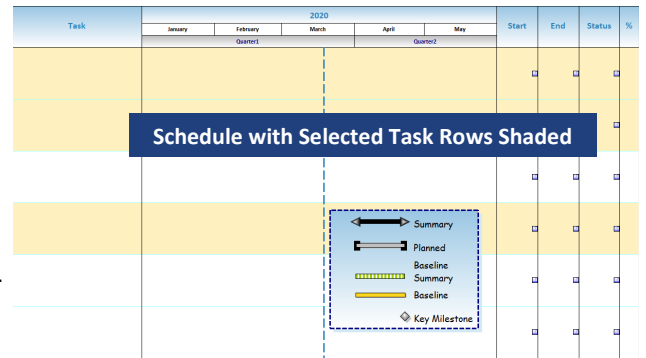
1. Select the **Format** tab.
2. In the **Gridlines** section click **Horizontal Gridlines and Shading**.
3. At the bottom of the dialog box, check on **Apply New Selections to all Three Sections**. When checked, selections made will apply to all three sections **Left Columns, Graph/Schedule Area** and **Right Columns**.
4. To turn off gridlines choose the **Gridlines** tab.
5. In the **Left Columns** section, uncheck **Show Gridlines**. **Graph/Schedule Area** and **Right Columns** will also uncheck.
6. To turn off shading choose the **Shading** tab.
7. In the **Left Columns** section, uncheck **Shade the Task Row**. **Graph/Schedule Area** and **Right Columns** will also uncheck.
8. Click **OK**. The shading and grid lines have been removed.



Light blue Line Guides are visible. To turn off go to the **View** tab in the **Optional Items** section uncheck **Line Guides**.

Change individual gridlines and shading

1. Select the (↵) **Arrow** tool in the toolbox. Hold the **Ctrl** key. Under the heading **Task**, click once on the first, second and fourth task rows to select them. The tool bar changes to the **Selection** tab with **Current Object: Task Row**.
2. In the **Task Row Settings** section, choose the down arrow next to **More Task Row Options**.
3. In the drop down menu choose **Gridlines/Shade**. The **Horizontal Grid and Shading Properties** dialog box displays.
4. Choose the **Shading** tab.
5. Under **Left Columns** section check on **Shade the Task Rows**. **Graph/Schedule Area** and **Right Columns** will also check on.
6. Under **Left Columns** section change **Shade Color** to **light yellow** or your color choice. **Graph/Schedule Area** and **Right Columns** will also show selected color.
7. Under **Left Columns** section change **Special Effects** to **None**. **Graph/Schedule Area** and **Right Columns** will also change.
8. Choose **OK**.



If a schedule is outlined, formatting can be set for each outline level. Choose **Format**. In the **Gridlines** section, click on **Gridlines, Shading, Font Sizes by Outline Level...** Formatting options include gridlines, shading, text attributes, and summary bar symbol settings.

Change the schedule's vertical gridlines

1. Choose the **Format** tab.
2. In the **Gridlines** section choose the **Vertical Gridlines...** The **Vertical Grid Options** dialog box will display.
3. On the **Yearly to Weekly** tab check on **Monthly**.
4. For **Monthly Line Type** select number **21**.
5. For **Monthly Line Color** select **silver** or your color choice.
6. Click **OK**.

