

Milestones PROFESSIONAL[®] TUTORIALS

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

In this lesson you will learn how to:

- Enter project steps
- Add a symbol (milestone) and/or symbol, horizontal bar, symbol combination using the toolbox
- Add a column
- 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 select **Open Samples or Lessons**. The **Open a Sample Chart** dialog displays.
3. Under **Select a Folder below to Open**, select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 02 Starter Schedule.mlj**.
5. Save the schedule to an accessible folder on your computer. Choose 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.

Project Steps	Start	End	September									
			1	2	3	4	5	6	7	8	9	10
			T	W	T	F	S	S	M	T	W	T
Lesson 2 Starter Schedule												

Enter the project steps

1. Click the **(T) Text** tool 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.
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**.

Project Steps	Start	End


← Click Here

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 **Edit | Delete | Current Page**.

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

Add a symbol (milestone) and/or symbol, horizontal bar, symbol combination using the toolbox

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

- Click once on the (+) **Small Plus** to the left of the first symbol, bar, symbol combination in the toolbox. The entire row will highlight. 
- 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. The date **Tuesday 9/1/20** will display next to the cursor. Click (and hold) the left mouse button.

For date to show, tooltips must be on **Tools | Program Options | Help**.

- Drag the mouse 2 days to the right until the cursor or the status bar (bottom left of the Milestones window) shows **Thursday 9/3/20**.



- Release the mouse button. The task has been added and the Start and End column cells are populated.

Steps	Start	End	1	2	3
			T	W	T
Get materials					

Cursor with Date Display

Steps	Start	End	1	2	3
			T	W	T
Get materials	9/1/20	9/3/20	9/1		9/3

Added Task Bar


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

- Using the mouse, move the cursor into the schedule area directly to the right of **Tear off old roof**.
- When the date displayed next to the cursor or in the status bar displays **Thursday 9/3/20**:
 - Click (and hold) with the left mouse button.
 - Drag the mouse to the right until the cursor or the status bar shows **Monday 9/7/20**.
 - Release the mouse button. The task has been added and the Start and End column cells are populated.

Steps	Start	End	1	2	3	4	5	6	7
			T	W	T	F	S	S	M
Get materials	9/1/20	9/3/20	9/1		9/3				
Tear off old roof	9/3/20	9/7/20			9/3				9/7

Added Task Bar

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

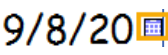
- In the toolbox select the (+) **Plus** tool and the green diamond. 
- Using the mouse, move the cursor into the schedule area to the right of **Put down tar paper**.
- Click and drag the mouse to the right until the cursor shows **Monday 9/7/20**. Release the mouse button. A single milestone is added and the Start and End column cells are populated.

Steps	Start	End	1	2	3	4	5	6	7	8
			T	W	T	F	S	S	M	T
Get materials	9/1/20	9/3/20	9/1		9/3					
Tear off old roof	9/3/20	9/7/20			9/3				9/7	
Put down tar paper	9/7/20	9/7/20							9/7	

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:

- Select the (T) **Text** tool in the toolbox.
- Move the cursor to the **Start** column cell for **Nail on shingles**. Type in **9/8/20** or use the calendar icon to select **9/8/20**. A green diamond Milestones will be added. 
- Move the cursor to the **End** column cell for **Nail on shingles**. Type in **9/10/20** or use the calendar icon to select **9/10/20**. A striped horizontal bar with a red diamond will be added.

Steps	Start	End	1	2	3	4	5	6	7	8	9	10
			T	W	T	F	S	S	M	T	W	T
Get materials	9/1/20	9/3/20	9/1		9/3							
Tear off old roof	9/3/20	9/7/20			9/3				9/7			
Put down tar paper	9/7/20	9/7/20							9/7			
Nail on shingles	9/8/20	9/10/20							9/8			9/10

Added Using the (T) Tool or Calendar

To turn on (or off) calendar icons: **View | Optional Items | Show calendar icons in date columns**.

Symbols and bars added using the Start and Finish columns can be chosen by selecting the **Column Heading**. Next select **Switch to Column**. In the **Date SmartColumn Display Settings** section choose the drop downs for **Normal Start Symbol, Bar, and Normal End Symbol**. The symbols and bars that can be selected are from the toolbox.

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.
4. Check on **Duration**.
5. Click **OK**. 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 | More Date Settings | Hourly, Minute, and Shift Settings**.

Project Steps	Start	End	Dur.	September											
				1	2	3	4	5	6	7	8	9	10		
				T	W	T	F	S	S	M	T	W	T		
Get materials	9/1/20	9/3/20	3d	9/1	9/3										
Tear off old roof	9/3/20	9/7/20	5d			9/3						9/7			
Put down tar paper	9/7/20	9/7/20	1d									9/7			
Nail on shingles	9/8/20	9/10/20	3d									9/8	9/10		

Inserted Duration Column

Move a column

1. Click the (↔) **Arrow** tool 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 shows moving a column from the left side of the schedule to the right side.

Project Steps	Start	End	Dur.	September											
				1	2	3	4	5	6	7	8	9	10		
				T	W	T	F	S	S	M	T	W	T		
Get materials	9/1/20	9/3/20	3d	9/1	9/3										

Move Column

Project Steps	Start	End	Dur.	September											
				1	2	3	4	5	6	7	8	9	10		
				T	W	T	F	S	S	M	T	W	T		
Get materials	9/1/20	9/3/20	3d	9/1	9/3										

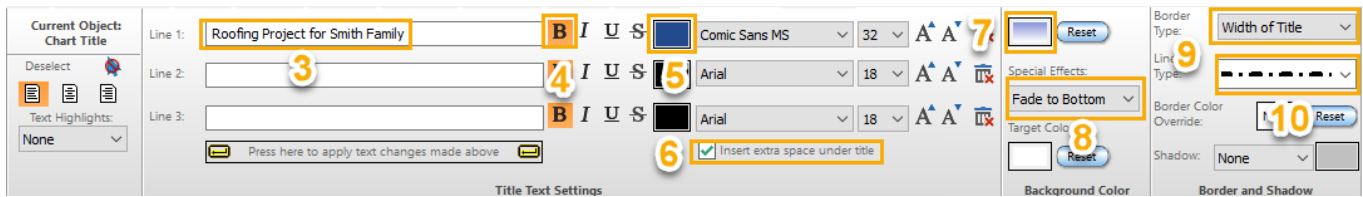
Insert Column

Project Steps	Start	End	Dur.	September											
				1	2	3	4	5	6	7	8	9	10		
				T	W	T	F	S	S	M	T	W	T		
Get materials	9/1/20	9/3/20	3d	9/1	9/3										
Tear off old roof	9/3/20	9/7/20	5d			9/3						9/7			
Put down tar paper	9/7/20	9/7/20	1d									9/7			
Nail on shingles	9/8/20	9/10/20	3d									9/8	9/10		

Moved Duration Column

Add a schedule title

1. Click the (↖) **Arrow** tool in the toolbox.
2. Click above the schedule. The toolbar changes to the **Selection** tab **Current Object: Chart Title** which contains all Chart Title options. Follow the numbers to add and change the Chart Title properties.



In the **Title Text Settings** section:

3. In **Line 1**: type in **Roofing Project for Smith Family**. Select the **Press here to apply text changes made above** .
4. Select the **(B) Bold** icon.
5. Select the color button. Choose **More Colors**, then select **Custom Colors' dark blue** or your color choice.
6. Check on **Insert extra space under title**.

In the **Background Color** section:

7. Choose the top color button. Choose **More Colors**, then select **Custom Colors' lighter blue** or your color choice.
8. **Special Effects** choose **Fade to Bottom**.

In the **Border Shadow** section:

9. **Border Type** choose **Width of Title**.
10. **Line Type** choose the **second dash and dotted** option or your Line Type choice.

Roofing Project for Smith Family

Project Steps	Start	End	September										Dur.
			1	2	3	4	5	6	7	8	9	10	
			T	W	T	F	S	S	M	T	W	T	
Get materials	9/1/20	9/3/20											3d
Lesson 2 Completed Schedule													
Tear off old roof	9/3/20	9/7/20											5d
Put down tar paper	9/7/20	9/7/20											1d
Nail on shingles	9/8/20	9/10/20											3d