

# Milestones PROFESSIONAL® TUTORIALS

## Lesson 3 – Work with Text

In this lesson you will learn how to:

- Add a block of freeform text
  - Customize freeform text
  - Add dates to symbols and adjust the date's position
  - Add text to a symbol and adjust the text's position
  - Add text in the middle of a bar using symbol text
  - Add angled text
  - Vertically move symbol text
  - Add a symbol note with picture and move it.

## **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 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 03 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.

## **Roof Project**

| Project Steps      | May'21                    |    |   |    |   |    |   |    |
|--------------------|---------------------------|----|---|----|---|----|---|----|
|                    | 19                        | 20 | 21  | 24 | 25  | 26 | 27  | 28 |
|                    | W                         | T  | F   | M  | T   | W  | T   | F  |
| Get materials      | Lesson 3 Starter Schedule |    |   |    |   |    |   |    |
| Tear off old roof  |                           |    |  |    |   |    |   |    |
| Put down tar paper |                           |    |   |    |   |    |  |    |
| Nail on shingles   |                           |    |   |    |  |    |   |    |

## Add a block of freeform text

1. Click the **(T) Text** tool in the toolbox.
  2. Click in the schedule area, to the right of the **Nail on shingles** step. The flashing cursor displays.

Put down tar paper

### Nail on shingles

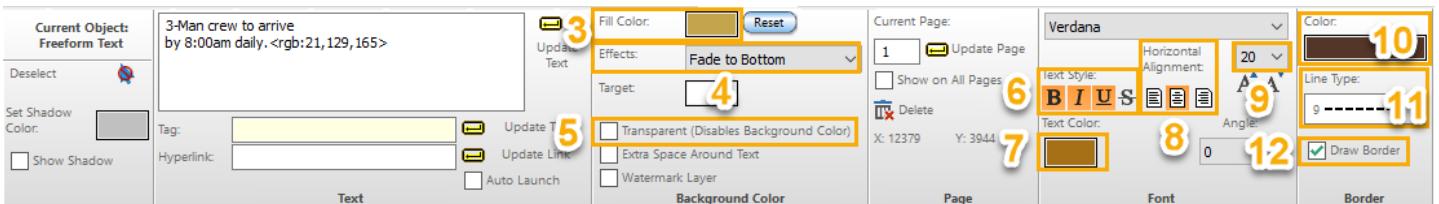
| ← Click Here

3. Type **3-Man crew to arrive.**
  4. Press **Enter** to split the text onto a new line.
  5. Type **by 8am daily.**
  6. Next to **by 8am daily.** Type in the following code color code <rgb:21,129,165> then click away from the text. This code will change this line of text to the color teal. **3-Man crew to arrive** text will not be affected.

## **Roof Project**

## Customize the freeform text block

1. Click the Arrow tool in the toolbox.
2. Click the freeform text **3-Man crew to arrive by 8am daily..**. The toolbar changes to the **Selection tab Current Object: Freeform Text** which contains all the selected freeform text options. Follow the numbers to change the selected freeform text properties.



In the **Background Color** section:

3. For **Fill Color** choose **gold** or your color choice.
4. For **Effects** choose **Fade to Bottom**.
5. Uncheck **Transparent (Disables Background Color)**. When this option is checked on the background of the freeform text will not color (is transparent.)

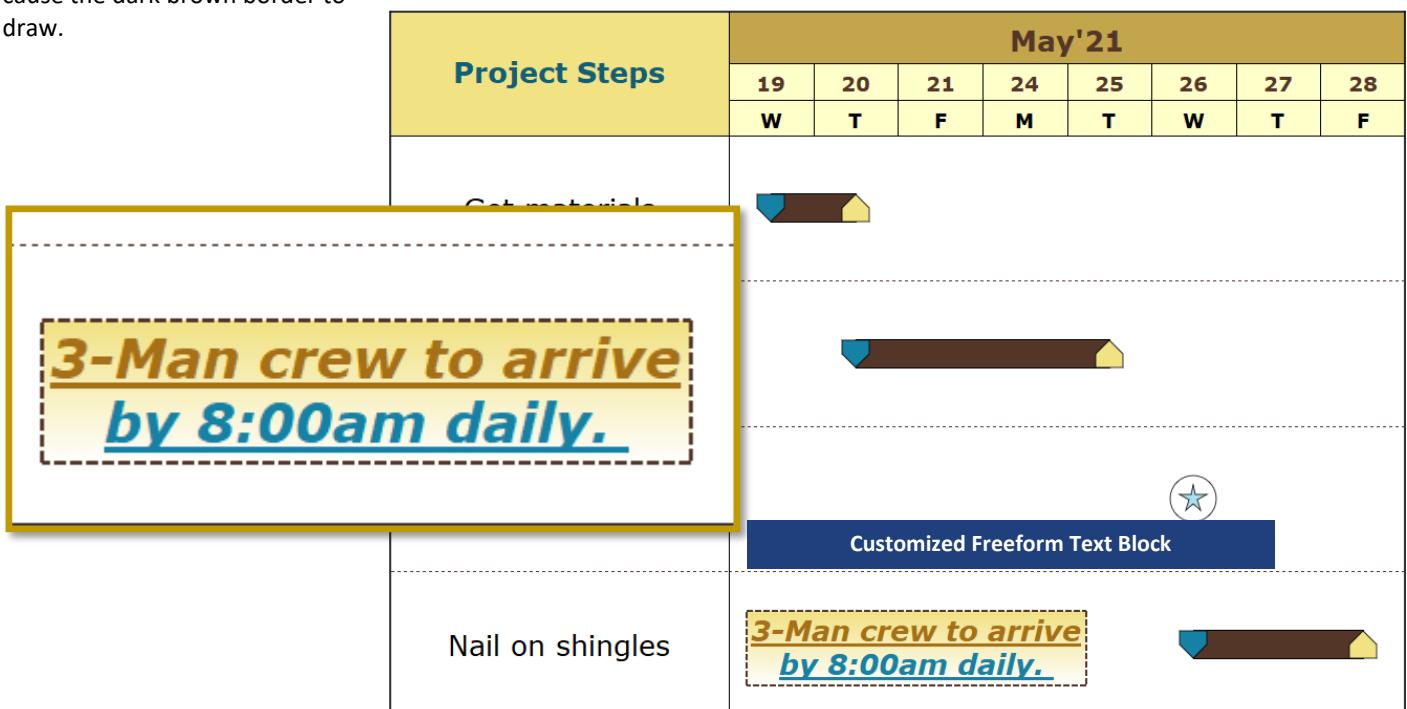
In the **Font** section:

6. For **Text Style** choose the **(B) Bold**, **(I) Italic** and **(U) Underline** icons.
7. For **Text Color** choose **medium brown** or your color choice. The first line of freeform text **3-Man crew to arrive** color will change. The second line of freeform text **(by 8am daily.)** that has been color coded will not be affected.
8. For **Horizontal Alignment** choose the **middle** icon.
9. Change the font size to **20**.

In the **Border** section:

10. For **Color** choose **dark brown** or your color choice.
11. For **Line Type** choose **9**.
12. Check on **Draw Border**. This will cause the dark brown border to draw.

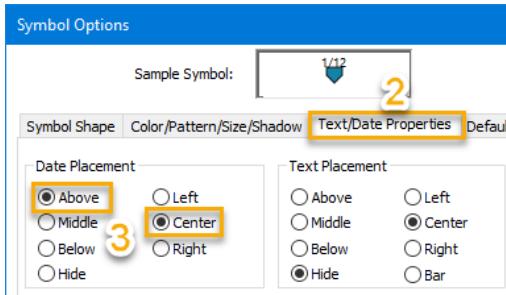
## Roof Project



## Display dates with symbols

### Globally

- In the toolbox, double-click the  symbol, that is used for the start symbols on your schedule. The **Symbol Options** dialog box displays.



- Click the **Text/Date Properties** tab.
- Under **Date Placement**, choose **Above** and **Center**.
- Click **OK**. Above each symbol its date is displayed.

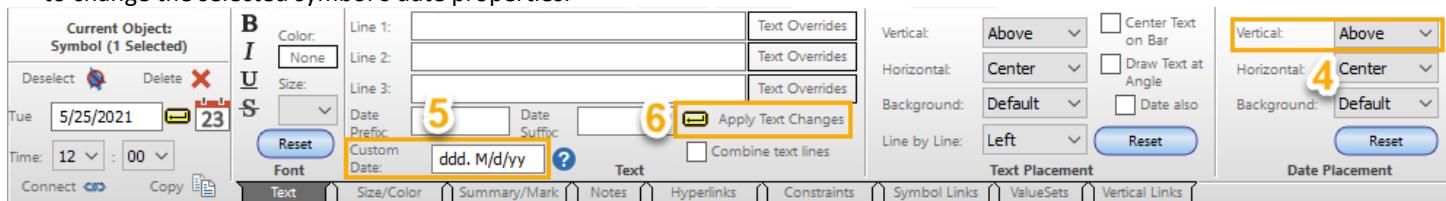
## Roof Project

| Project Steps      | May '21                          |    |    |    |      |    |    |    |
|--------------------|----------------------------------|----|----|----|------|----|----|----|
|                    | 19                               | 20 | 21 | 24 | 25   | 26 | 27 | 28 |
| Get materials      | 5/19                             |    |    |    |      |    |    |    |
| Tear off old roof  | 5/20                             |    |    |    |      |    |    |    |
| Put down tar paper |                                  |    |    |    |      |    |    |    |
| Nail on shingles   | <b>Date Displayed on Symbols</b> |    |    |    | 5/26 |    |    |    |

To change the symbol date format, choose **Dates | Date Related Settings | Set Symbol Date Format**. Choose from a list of predefined formats or create a custom format.

### Individually

- Click the  Arrow tool in the toolbox
- On the schedule, in the task row for **Tear off old roof** click  (the **end symbol**.)
- The toolbar changes to the **Selection** tab **Current Object: Symbol (1 Selected)** which contains all that symbol's options. Follow the numbers to change the selected symbol's date properties.



- On the **Text** tab in the **Date Placement** section for **Vertical** select **Above**. The date will now display on that symbol. (In the same format as the start symbol's date.)
- Change just this symbol's date format. In the **Text** section for **Custom Date**, type in the following code: **ddd. M/d/yy**.

Select the  question mark icon to view all available codes for the custom date format.

- Press the  **Apply Text Changes** button. The date **Tue. 5/25/21** will display above the end symbol.

## Roof Project

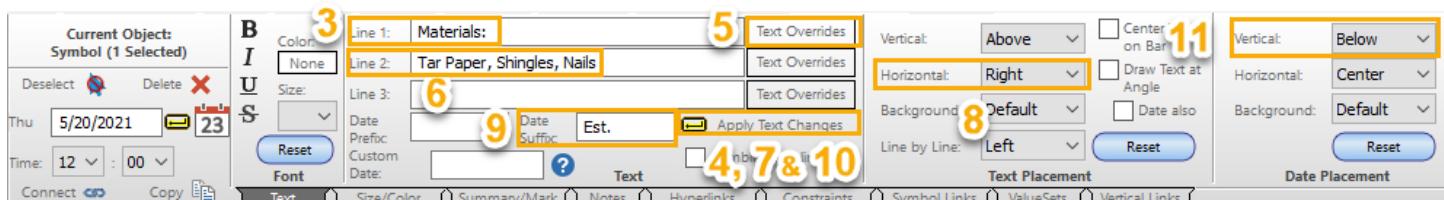
| Project Steps     | May '21 |    |    |    |    |    |    |    |
|-------------------|---------|----|----|----|----|----|----|----|
|                   | 19      | 20 | 21 | 24 | 25 | 26 | 27 | 28 |
| Get materials     | 5/19    |    |    |    |    |    |    |    |
| Tear off old roof | 5/20    |    |    |    |    |    |    |    |
| Tear off old roof |         |    |    |    |    |    |    |    |
| Nail on shingles  |         |    |    |    |    |    |    |    |

### Adjust symbol date position with the keyboard

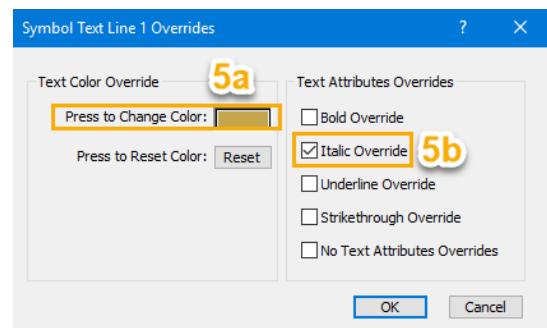
- Click the  Arrow tool in the toolbox.
- On the schedule, click once on the symbol with the symbol date to be moved.
- Hold down **ALT + CTRL**.
- Click the **arrow keys on the keyboard** to move the symbol date around the symbol. The symbol date will move as you click the arrow keys.

## Annotate a symbol with symbol text

1. Click the **Arrow** tool in the toolbox
  2. Click (the **end symbol** for the **Get materials** step). The toolbar changes to the **Selection tab Current Object: Symbol** which contains all that symbol's options. Follow the numbers to add and customize this symbol's text.



3. In the **Text** section for **Line 1** type in **Materials**:
  4. Press the  **Apply Text Changes** button.
  5. In the **Text** section click **Text Overrides** for **Line 1**. The **Symbol Text Line 1 Overrides** dialog box will come up.
    - a. Under **Text Color Override** click the **Press to Change Color** rectangle to open the color palette. Choose **light brown** or your color choice
    - b. Under **Text Attributes Overrides** check on ***Italic Override***.
    - c. Click **OK**.



To change the default symbol text style, color, size and attributes choose **Format | Default Text | Symbol Text**. By selecting a symbol or group of symbols they may have their own symbol text size, color and attributes. Symbol date is considered symbol text thus it will have the same look. Symbol text color override can be set in the toolbox, **Symbol Options** dialog choose the **Color/Pattern/Size/Shadow** tab.

# Roof Project

- In the **Text** section for **Line 2** type in **Tar Paper, Shingles, Nails.**
  - Press the  **Apply Text Changes** button.
  - In the **Text Placement** section, for **Horizontal** choose **Right**.
  - In the **Text** section, for **Date Suffix**, type in **Est..**
  - Press the  **Apply Text Changes** button.  
You will not see any change until the next step.
  - In the **Date Placement** section, for **Vertical** choose **Below**.

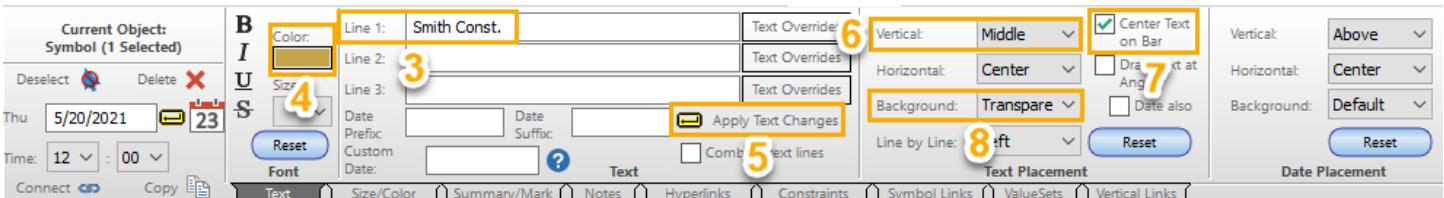
| Horizontal<br>button.<br>, type in<br>s button.<br>the next | Project Steps     | May'21 |  |    |          |                                  |    |    |    |
|---|-------------------|--------|--|----|----------|----------------------------------|----|----|----|
|   |                   | 19     | 20   | 21 | 24       | 25                               | 26 | 27 | 28 |
|   |                   | W      | T  | F  | M        | T                                | W  | T  | F  |
|   | Get materials     | 5/19   | <i>Materials:</i><br>Tar Paper, Shingles, Nails  |    | 5/20Est. | Added and Customized Symbol Text |    |    |    |
|   | Tear off old roof | 5/20   | Tue. 5/25/21                                     |    |          |                                  |    |    |    |
|   | Get materials     | 5/19   | <i>Materials:</i><br>Tar Paper, Shingles, Nails  |    | 5/20Est. |                                  |    |    |    |
|   | Nail on shingles  | 5/26   | <i>3-Man crew to arrive<br/>by 8:00am daily.</i> |    |          |                                  |    |    |    |

## Adjust symbol text position with the keyboard

1. Click the **(↖) Arrow** tool in the toolbox..
  2. On the schedule, click once on the symbol with the text to be moved.
  3. Hold down the **ALT key**.
  4. Click the **arrow keys on the keyboard** to move the text around the symbol. The text will move as you click the arrow keys.

## Add text in the middle of a horizontal bar using symbol text

1. Click the Arrow tool in the toolbox.
2. Click the start symbol for Tear off old roof. The toolbar changes to the Selection tab Current Object: Symbol which contains all that symbol's options. Follow the numbers to add symbol text to the horizontal bar.



3. In the **Text** section for **Line 1** type in **Smith Const.**
4. In the **Font** section, for **Color** choose **Gold** or your color choice. This will also change the symbol's date color.
5. Press the **Apply Text Changes** button.
6. In the **Text Placement** section, for **Vertical** choose **Middle**.
7. In the **Text Placement** section, for **Background** choose **Transparent**.
8. In the **Text Placement** section, check on **Center Text on Bar**.

Use Symbol Text when text needs to "stick" to a task or symbol when the schedule updates.

**Roof Project**

| May '21       |   |    |    |    |    |    |    |
|---------------|---|----|----|----|----|----|----|
| Project Steps | 19                                      | 20 | 21 | 24 | 25 | 26 | 27 |
| Get materials | W                                       | T  | F  | M  | T  | W  | T  |
| 5/19          | Materials<br>Tar Paper, Shingles, Nails |    |    |    |    |    |    |
| 5/20          | Tue. 5/25/21 Const.                     |    |    |    |    |    |    |
| 5/25          |   |    |    |    |    |    |    |

**Text in the Middle of a Horizontal Bar**

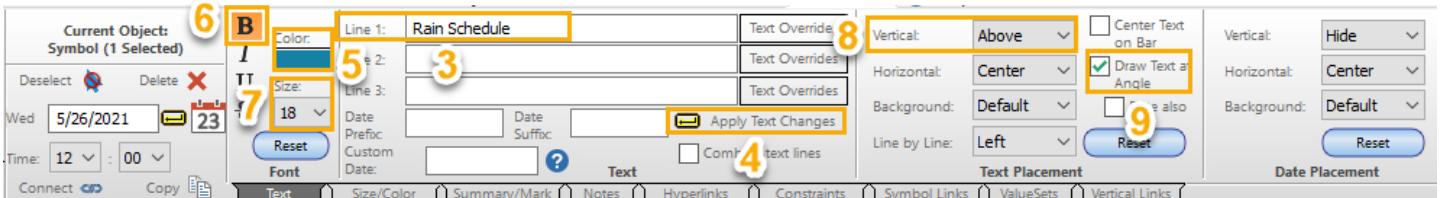
5/20      Tue. 5/25/21

Smith Const.

Always use the left-most symbol to enter text for a bar.

## Draw symbol text at an angle

1. Click the Arrow tool in the toolbox.
2. Click the star symbol for Put down tar. The toolbar changes to the Selection tab Current Object: Symbol which contains all that symbol's options. Follow the numbers to add angled symbol text.



3. In the **Text** section for **Line 1**, type in **RAIN SCHEDULE**.
4. Press the **Apply Text Changes** button.
5. In the **Font** section for **Color**, choose **teal** or your color choice.
6. In the **Font** section, select the **(B) Bold** icon.
7. In the **Font** section, for **Size** select **18**.
8. In the **Text Placement** section, for **Vertical** choose **Above**.
9. Check on **Draw Text at Angle**.

Angled text will only show the first line of text as a single line of text regardless of how many lines of text are entered.

The default angle is set to 45 degrees. To change the angle select Tools | Program Options | Edit | Angle for Angled Symbol Text .

**Roof Project**

| May '21       |   |    |    |    |    |    |    |
|---------------|---|----|----|----|----|----|----|
| Project Steps | 19                                      | 20 | 21 | 24 | 25 | 26 | 27 |
| Get materials | W                                       | T  | F  | M  | T  | W  | T  |
| 5/19          | Materials<br>Tar Paper, Shingles, Nails |    |    |    |    |    |    |
| 5/20Est.      |   |    |    |    |    |    |    |
| 5/25          | Tue. 5/25/21 Const.                     |    |    |    |    |    |    |
| 5/26          |   |    |    |    |    |    |    |

**Angled Text**

25/21

Rain Schedule

Put down

Nail on

## Vertically move symbol text

1. Click the **(↖) Arrow** tool in the toolbox.

2. On the schedule in the task row for **Nail on shingles** click the  **end symbol**.

3. The toolbar changes to the **Selection** tab **Current Object: Symbol** which contains all that symbol's options. Follow the numbers to change the selected symbol's date properties.

4. In the **Text** section, for **Line 1** type in ***Complete***. **Line 2** type in ***upon inspection***.

5. Press the  ***Apply Text Changes*** button.

6. Choose the ***Tools*** tab.

7. In the **Customize** section choose **Symbol Text Move**.

8. Under **Symbol From Toolbox** choose ***the fourth symbol in the list, the plus symbol*** (best to use a symbol that is not being used on the schedule). In the toolbox the symbol will change to shape #28, an invisible symbol.

9. Under Vertical Link From Toolbox, choose the ***second vertical link in the list, the dotted line with arrow***.

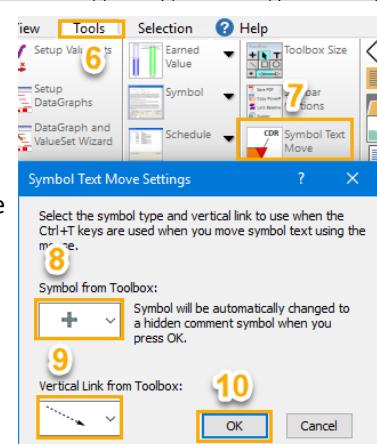
10. Choose **OK**.

11. On the schedule, click and hold on the symbol with the **Complete upon inspection** text.

12. Hold down **Ctrl + T**.

13. Drag to move the text to the task row above. The text is no longer attached to the end symbol on **Nail on shingles**. It is now attached to a blank symbol on the task row above.

14. Reposition the text ***Completion upon inspection*** by repositioning the symbol it is attached to now. Click on the text in the schedule and the symbol will be selected. The toolbar changes to the **Selection tab Current Object: Symbol** which contains all of that symbol's options. Follow the numbers to change the selected symbol's date properties.



- Current Object: Symbol (1 Selected)

Key a size from .10 to 5.00:

15x

Reset Symbol size to chart default

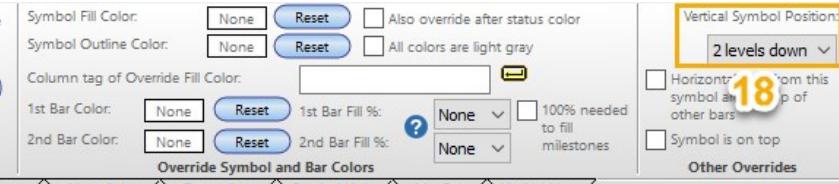
5/27/2021 23:16

16

Ignore size override for text and date placement

17

Symbol Size Override

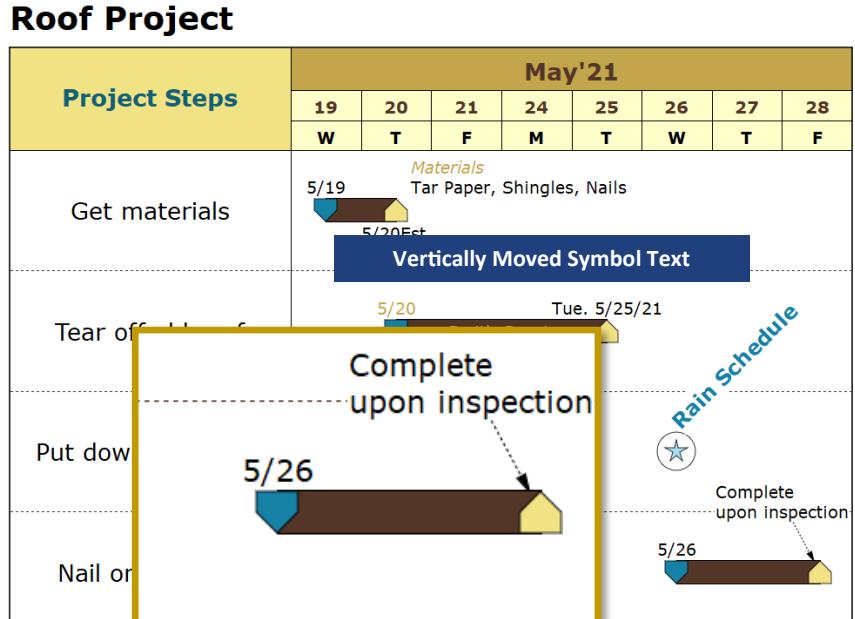


15. Use the calendar icon to change the symbol's date to **5/27/2021**.

16. Change the **Time** to **24:00**. Now the text will be inside the schedule's border.

- 17 Choose the **Size/Color** tab.

18. In the **Other Overrides** section, under **Vertical Symbols Position** choose **2 levels down**. Now the text will be just above the symbol.



## Symbol Note with Picture

### Add a picture to the schedule and give it a tag for use in a symbol note

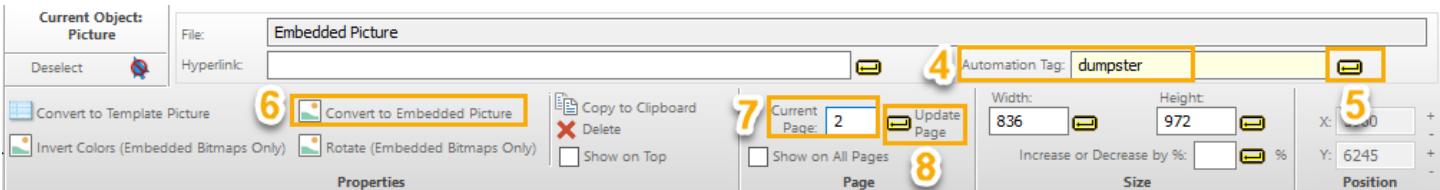
1. On the **Insert** tab, in the **Picture, Legend** section, choose **Picture from File**. Navigate to the **Program Files\KIDASA\Milestones Professional 2021\Samples\Lessons** and choose **dumpster.jpeg**

Before an image can be shown in a symbol note, it has to be added to the file.

2. When the cursor appears, click on the schedule to add the picture. Drag a corner of the picture to make it larger.

The size of the image on the schedule determines the size that will be shown in the symbol note. Drag the corner of the picture to resize the picture to the size you would like in the note.

3. With the Arrow tool in the toolbox click the picture which is now on the schedule. The toolbar changes to the **Selection** tab **Current Object: Picture** which contains all the selected picture's options. Follow the numbers to change the picture's properties.



4. In the **Automation Tag**, type in **dumpster** to name the picture.

Images need to be named to display in a note.

5. Press the Apply button.

6. Choose **Convert to Embedded Picture**.

If sharing the schedule with other users of Milestones Professional the picture needs to be embedded in the schedule.

7. In the **Page** section, for **Current Page** enter **2**.

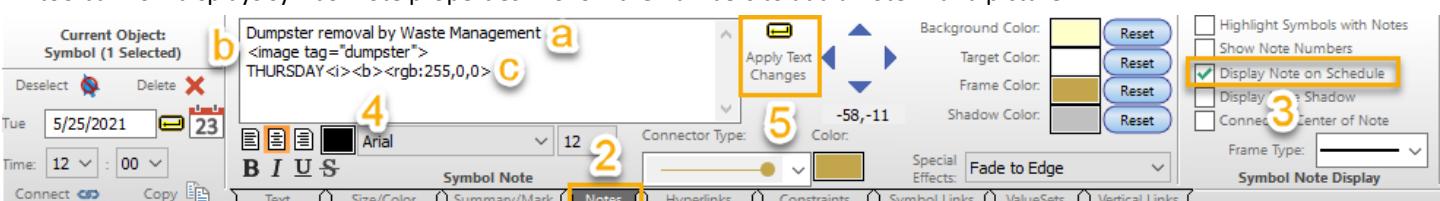
8. Press the Update Page button. The picture will be moved to page 2 and now is ready to be used in a note.

Moving a picture to a page does not add a page to the file. It stores the picture on that page. The **Manage Pictures** option on the **Tools** menu makes it easy to find, move from page to page or delete a picture.

### Add a note with a picture to a symbol

1. Click the Arrow tool in the toolbar. Click the end symbol for Tear off old roof.

2. The toolbar changes to the **Selection** tab **Current Object: Symbol**. At the bottom of the toolbar choose the **Notes** tab. The toolbar now displays symbol note properties. Follow the numbers to add a note with a picture.



3. In the **Symbol Note Display** section, check on **Display Note on Schedule**.

4. In the note text box type in:

a. **Dumpster removal by Waste Management.**

b. Press the keyboard **Enter** and type in the following markup code to have the picture show in the notes on the schedule. **<image tag="dumpster">** (The dumpster in the tag refers to the picture which was "tagged" dumpster in an earlier step.)

c. Press **Enter**. Then type in the following: **Thursday**

**<i><b><rgb:255,0,0>**

(Anything inside <> is a "markup code" used to change the characteristics of that line of text **<i>** for Italic, **<b>** for bold, and **<rgb:255,0,0>** for red.)

5. Press the Apply Text Changes button.

Use hard line breaks to control the line breaks in the displayed note, as text is not word wrapped. A line is limited to no more than 150 characters

5/20

Tue. 5/25/21

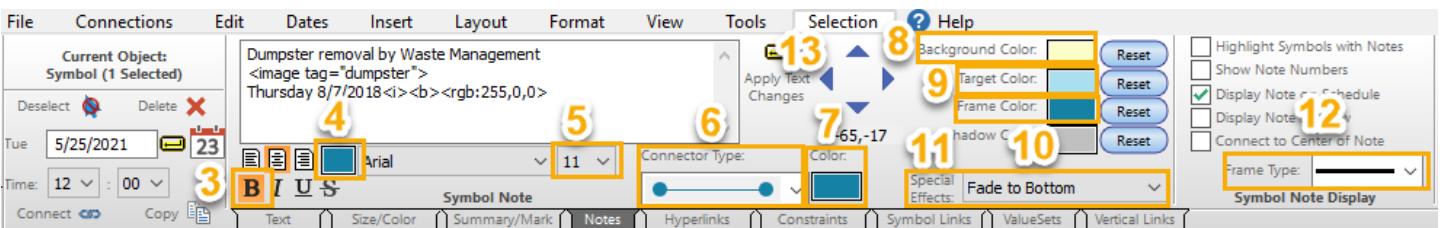
### Symbol Note with Picture



To set symbol note default properties for text and look choose **Format | Default Text | Symbol Notes**.

## Format and move the symbol note just added

1. Click the Arrow tool in the toolbox. Click the end symbol for Tear off old roof.
2. The toolbar changes to the **Selection** tab **Current Object: Symbol**. At the bottom of the toolbar choose the **Notes** tab. The toolbar now displays symbol note properties. Follow the numbers to change the selected symbol note's properties.



3. Choose **B** for bold.

Only **Dumpster removal by Waste Management** text will be affected by this selection.

4. Select the color rectangle to open the color palette. Choose **Teal** or your color choice.

Only **Dumpster removal by Waste Management** text will be affected by this selection.

5. Choose **11** for font size.

6. For **Connector Type** choose the third option from top.

The connector draws a link between the notes box and the symbol.

7. For **Color** choose **Teal** or your color choice.

## Roof Project

8. For **Background Color** choose **Yellow** or your color choice.

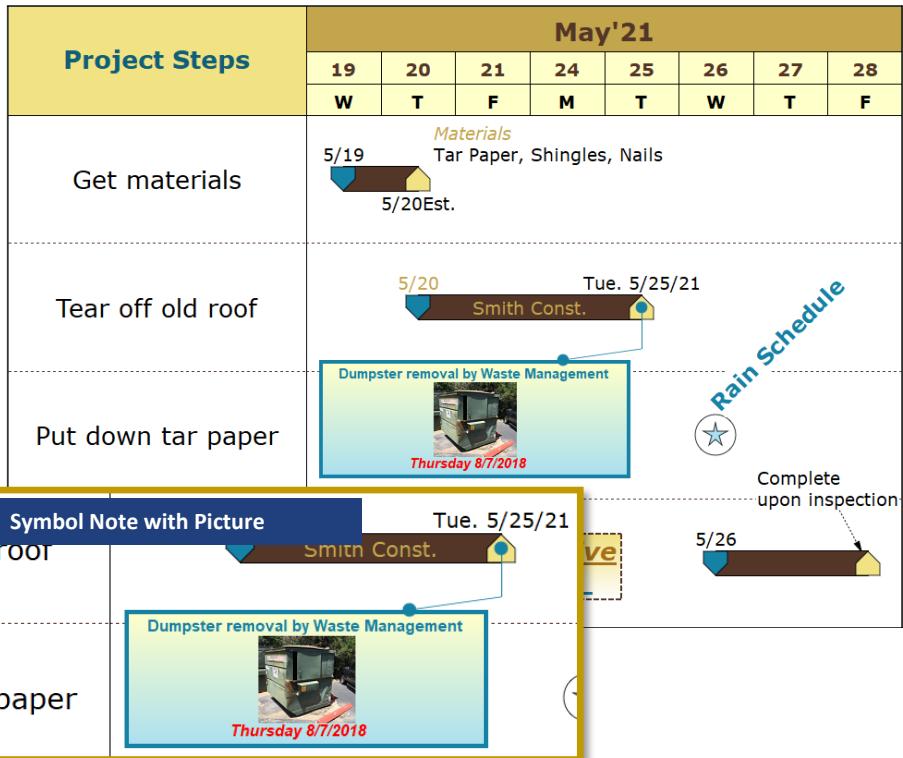
9. For **Target Color** choose **Aqua** or your color choice.

10. For **Frame Color** choose **Teal** or your color choice.

11. For **Special Effects** choose **Fade to Bottom**.

12. For **Frame Type** choose a bold line.

13. Use the direction controls to move the symbol note. (Or using the mouse, click on the note and drag it to the space next to **Put down tar paper**.)



Default symbol note formatting can be set by selecting the **Format | Default Text | Symbol Notes**.

Use Note Text (or symbol text) on dense schedules when text needs to "stick" to a task or symbol when the schedule updates.

To have text stick to a task without displaying a symbol, consider using a **comment symbol**. A comment symbol can be a blank symbol or a very small symbol on a task row. The comment symbol is ignored when computing start date, end date and duration so it can be placed anywhere on the schedule. To create a comment symbol, just double-click any unused symbol in the toolbox and choose **Comment Symbol** under the **Symbol Shape** tab.