

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.

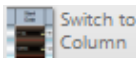

Open the schedule for this lesson

1. On the toolbar, choose **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 06 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.

Swimming Pool Construction					
PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
301 Sunspot					1
Excavate	◀▶				1
Plumbing					1
Pool Plumbing		▶◀			1
Hook-up Water	Lesson 6 Starter Schedule				1
Masonry			○-----○		1
455 Tombstone					1
Excavate	▶◀				1
Plumbing					1
Pool Plumbing		▶◀			1
Hook-up Water			▶◀		1
Masonry			○-----○		1

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, under **Indent per Outline Level** type in **0.2**.
5. Then click the  **apply** button. The column will now be indented when outlined. Right now, there is no difference on the schedule. You will outline the task rows in the next section of this tutorial. The task row indented to level 2 will indent .2. The next task row indented to level 3 will indent .2 plus .2 more and so on.

To have the keyboard **Tab** key used for indenting choose **Tools | Program Options | Edit | 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. These steps are now at outline level 2.
4. Click within the schedule area to de-select the project steps. Notice that the tasks which are now outline level 2 are shaded differently. This schedule is set up with outline shading (shading will be different for each outline level.)

Swimming Pool Construction					
PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
301 Sunspot					1
Excavate					2
Plumbing					2
Pool Plumbing		Indented Schedule			2
Hook-up Water					2
Masonry					2
455 Tombstone					1
Excavate					2
Plumbing					2
Pool Plumbing					2
Hook-up Water					2
Masonry					2

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

Some schedules (like this one) use outline level shading. To change task row colors and attributes based on outline level, choose **Format | Gridlines | Gridlines Shading, Font Sizes by Outline Level**.

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. These steps are now at outline level 3.

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

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

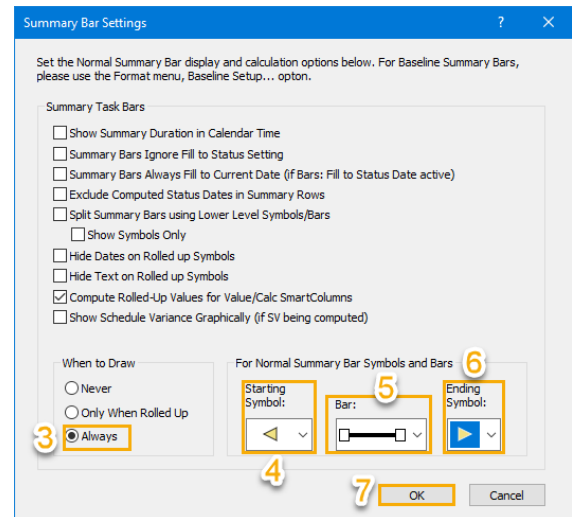
4. Click within the schedule area to de-select the project steps. Notice that the tasks which are now outline level 3 are shaded differently. This schedule is set up with outline shading (shading will be different for each outline level.)

Notice that on the level 1 and 2 tasks, no schedule information was added for these tasks. Now that the task are indented Milestones Professional's Summary Bar Setting options can be set to draw the summary information. In the next section of the tutorial you will turn on Summary Bar Setting options.

Set summary bar options

Draw a single summary bar for all lower level symbols.

1. Choose 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**, select the **Always** option.
4. Under **For Normal Summary Bar Symbols and Bars** for the **Starting Symbol**: select the down arrow and choose the third symbol (**gold triangle pointing left**.)
5. Under **For Normal Summary Bar Symbols and Bars**, for the **Bar**: select the down arrow and choose the second bar (**thin black bar**.)
6. Under **For Normal Summary Bar Symbols and Bars**, for the **Ending Symbol**: select the down arrow and choose the fourth symbol (**gold triangle pointing right**.)
7. Click **OK**.



Now, on the top level summary bars a start symbol has been added at the first start date of the lower level tasks, connected with a horizontal bar, to a finish symbol placed at the last date of the lower level tasks.



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

Have lower level symbols and bars rollup to the summary level

In the **Summary Bar Settings** dialog box, check on **Split Summary Bars using Lower Level Symbols/Bars**.

Split Summary Bars using Lower Level Symbols/Bars
 Show Symbols Only

301 Sunspot		↔	↔	⊙-----⊙	1
Excavate		↔			2
Plumbing		↔	↔		2
Pool Plumbing			↔		3
Hook-up Water				↔	3

Have only lower level symbols rollup to the summary level.

In the **Summary Bar Settings** dialog box, choose check on **Split Summary Bars using Lower Level Symbols/Bars** and check on **Show Symbols Only**.

Split Summary Bars using Lower Level Symbols/Bars
 Show Symbols Only

301 Sunspot		▽	▽	◇	◇	◇	◇	⊙	⊙	1
Excavate		↔								2
Plumbing			◇	◇	◇	◇				2
Pool Plumbing				↔						3
Hook-up Water						↔				3

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.

301 Sunspot	Collapsed		1
455 Tombstone	Expanded		1
Excavate			2
Plumbing			2
Masonry			2

In **Tools | Program Options | General** change the look (size, color, and/or shape) of the **Collapse/Expand Indicators**.

301 Sunspot	Collapsed
455 Tombstone	Expanded
Excavate	
Plumbing	

301 Sunspot	Collapsed
455 Tombstone	Expanded
Excavate	
Plumbing	

301 Sunspot	Collapsed
455 Tombstone	Expanded
Excavate	
Plumbing	

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.

Swimming Pool Construct	
PROJECTS	Feb
301 Sunspot	
Excavate	
Plumbing	

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**. Once collapsed the options will change to **Expand Selected Task Row**

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

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

Expand all project steps at once

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

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. Select the (↶) **Arrow** tool in the toolbox.
2. Click on the word **PROJECTS**. The column heading will highlight.
3. Select the **Insert** tab.
4. In the **Rows, Columns** section, choose **New Column**.
5. From the menu, choose **WBS Number**.
The **Starting WBS Number** dialog box displays.
6. In the **Starting WBS Number** dialog box, for the **Starting WBS Number** enter **1**.
7. 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 V		←—→			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

The **Starting WBS Number** dialog allows customized WBS for each outline level (up to 20 levels). The WBS can be displayed as numbers or letters (lower or upper case.)

Starting WBS Number ? X

Key the starting WBS number to be used on this chart. The default display is numeric for all 20 levels. If you wish some or all of the levels to be displayed using letters, then set the appropriate options in the Alphabetic Display section below:

Starting WBS Number: Enter as numeric only.

Suppress display of First Level WBS Number

Alphabetic Display

Level:	1	2	3	4	5	6	7	8	9	10
Use Letters:	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Case:	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Level:	11	12	13	14	15	16	17	18	19	20
Use Letters:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Upper Case:	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Swimm
WBS
A
A.a
A.b
A.b.1
A.b.2
A.c
B
B.a
B.b
B.b.1
B.b.2
B.c