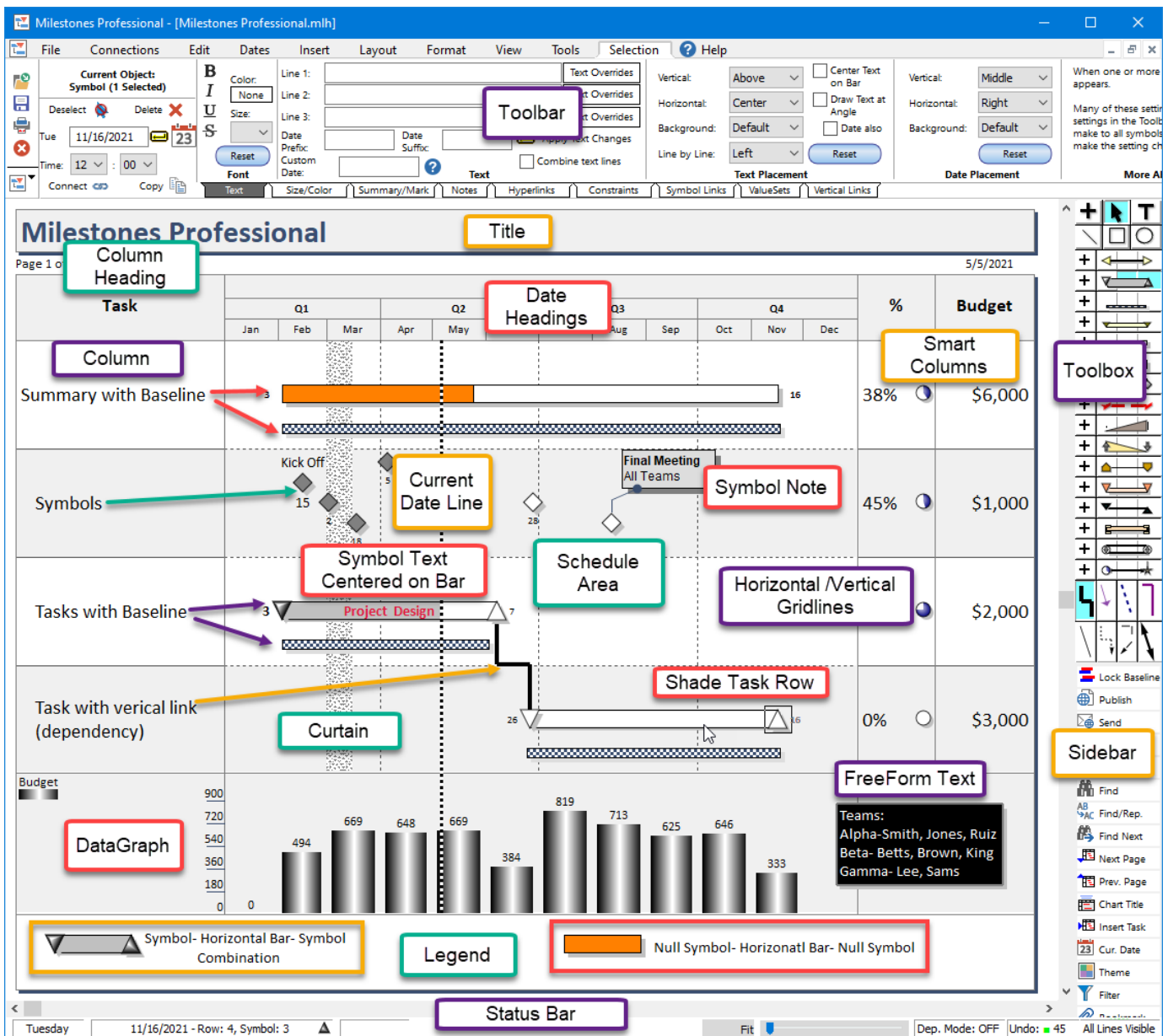


# Getting Started Milestones Professional

## Know the ELEMENTS of Milestones Professional

If you know the names of the elements of the Milestones Professional window then you can access information about these elements using the [Milestones Professional Help](#).



To maneuver around the Milestones Professional window use: the Toolbox's **Arrow** tool to select elements; the **Plus** tool for adding symbols, horizontal bars, vertical links; the **T** tool for adding text .

# Getting Started with Milestones Professional

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Build a Milestones Professional schedule from scratch by following these steps

▼ Set up the TOOLBOX .....	2
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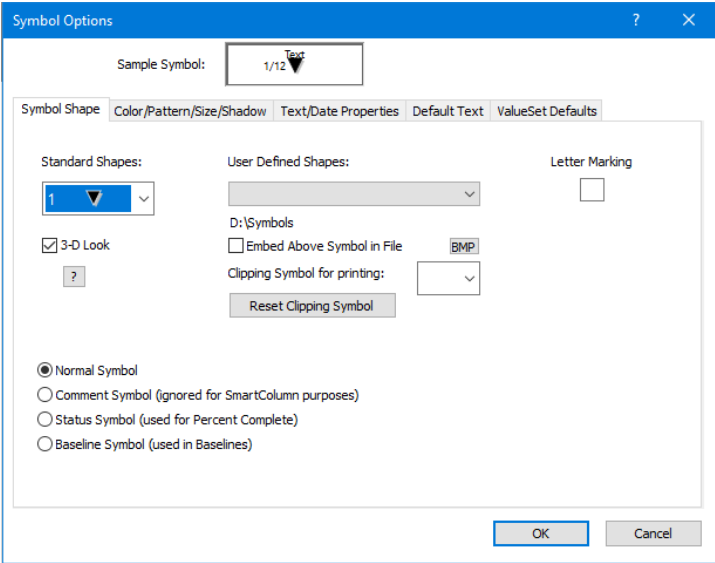


## Set up the **TOOLBOX**

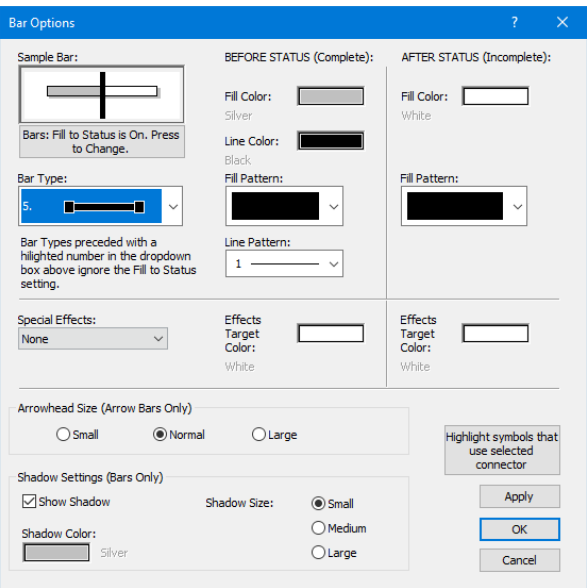
Set up the toolbox to have the style of symbols, symbol-horizontal bar-symbol combinations and/or vertical links to add to your schedule.

Double click any symbol, horizontal bar or vertical link in the toolbox to open its Options dialog to changes its characteristics .

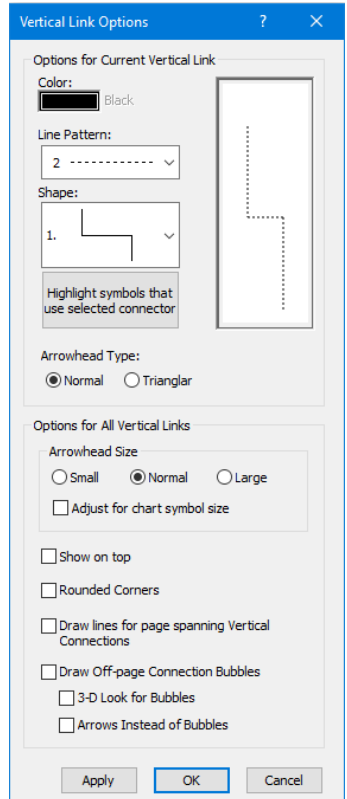
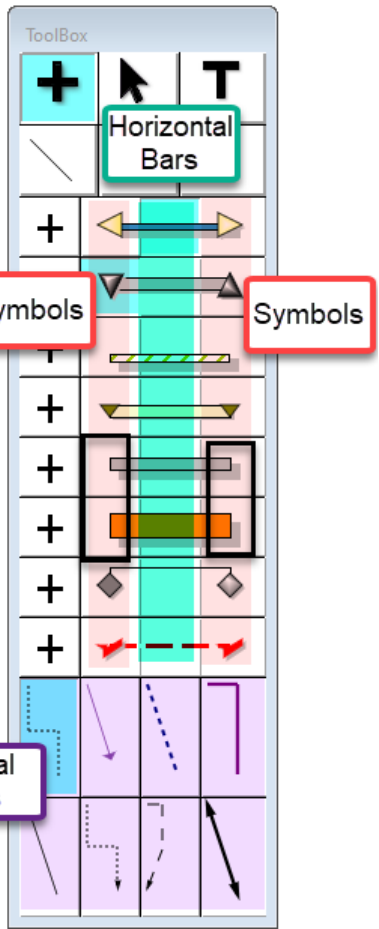
**Double click a symbol** to get the **Symbol Options** dialog box. Select a tab to change the characteristics of a symbol: Shape, Type, Before Status Color, After Status Color, After Status Symbol, Shadow, Size, Text Placement, Date Placement , Date Format, Vertical Position on a Task Row, Text Background Color, Default Text, ValueSet Value.



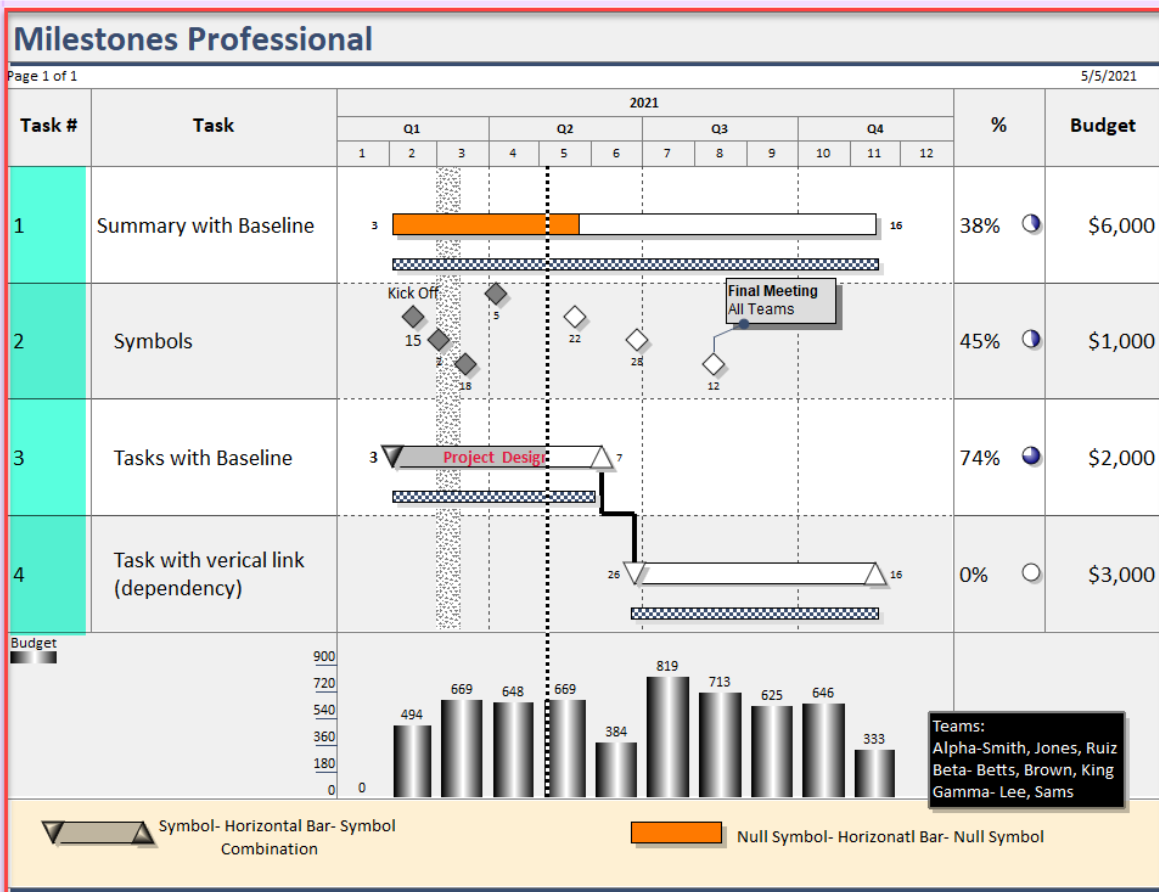
**Double click a horizontal bar** to get the **Bar Options** dialog box to change the characteristics of a horizontal Bar: Shape, Line Pattern, Before Status Color and Fill Pattern, After Status Color and Fill Pattern, Line Pattern, Arrowhead size of Arrow Bars, Shadow.



**Double click a vertical link** to get the **Vertical Link Options** dialog box to change the characteristics of a vertical link: Shape, Line Pattern, Color, Arrowhead Type and Size, Show on Top , Rounded Corners, Off Page Connections Options.



**Horizontal bars and vertical links always originate out of a symbol. When an actual symbol shape is not visible null symbol style #28 or #33 is being used.**



File   Connections   Edit   Dates   Insert   **Layout**   Format   View   Tools   Selection

Chart Size: Horiz: 11.0   Vert: 8.5   Printer Orientation: Landscape

Margins: Left: 0.5   Right: 0.1   Top: 0.8   Bottom: 0.5   Make your changes, press below: Undo:

☒ Ignore Automatic Top Margin   Apply Setting Changes   Apply Legend Changes

Lock Layout   Rows per Page: 4   Overall Column Layout:   Full Page Layout Dialog:

Page Size   Legend Size

Choose the **Layout** tab: set the **Printer Orientation** selecting to have your schedule **Landscape** or **Portrait**; change the **Chart Size**; change the **Margins**, Check on **Ignore Automatic Top Margin** to remove default space at the top of the schedule; change the **Rows Per Page** (increase the rows per page if you want some rows bigger than others); **Enter Legend Height** (an entry of 0 will delete the legend).

Select **Overall Column Layout** to activate the toolbar for all columns. To: **Add** - enter a value (Choose the **Insert** tab to insert specific column types), **Remove** - select the red X under the columns value, **Resize** - change the current value, **Hide** - select the blue box with column number, it will change to gray keeping the column value (size) however hiding the column.

Edit   Dates   Insert   **Layout**   Format   View   Tools   Selection   ? Help

1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.76	2.21	0.83	1.05	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X	X

Columns on Left Side of Schedule Area      Click Here to apply any changed column widths      Columns on Right Side of Schedule Area

## Set your schedule's DATE RANGE

The date range is the time span which is displayed in the schedule area. The date range can be as small as one minute (in which case the start and end dates are the same), or it can span several years, decades, or centuries.

Task

2019

Jan Feb Mar Apr May Jun Jul Aug Sep Oct Nov Dec

File Connections Edit **Dates** Insert

Displayed Start Date: 1/1/2019 23

Displayed End Date: 12/31/2019 23

More Settings...

**Start and End Dates**

Page by Page Date Range Overrides

Yearly, Monthly, and Fiscal Year Settings

Weekly, Daily, and Holiday Shading

Hourly, Minute, and Shift Settings

**More Date Settings**

Choose the **Dates** tab - In the **Start and End Dates** section - Change the **Displayed Start Date** and **Displayed End Date**. Manually enter the date, then select the apply button or use the calendar icons to select the dates.

Review the options in the **More Date Settings** section to have Date Overrides on Pages, Set Fiscal Year Settings, Show and Shade Holidays and Weekends, Allow Hourly, Minute, Work Shift Display.

## Set your schedule's DATE HEADINGS

Up to 4 date headings can be shown on a schedule. Headings can be placed above and/or below the schedule area. Date headings can be attached to a task row. For each level, choose one of the 30+ built in headings or create a custom heading. It's even possible to set up logarithmic headings to enlarge one or more time period.

Dates

Yearly: 2018, 2019, ...

Quarterly (CY): Q1, Q2, Q3,...

Monthly: January, February,...

(None)

Date Headings Full Dialog: [X]

Date Headings

Choose the **Dates** tab - In the **Date Headings** section - Choose **Date Headings Full Dialog** OR **click on any date heading** to activate the **Selection** tab containing date headings options: Font Type, Style, Color, Size; Start # (some headings); Frequency; Background Color/Effects; Add Prefix and /or Suffix (some headings); Show Headings on Top and/or Bottom of the schedule.

Choose **Edit Custom Headings** to create your own headings.

File Connections Edit Dates Insert Layout Format View Tools **Selection** ? Help

Current Object: Date Heading

Deselect

Edit Custom Headings

Set Start and End Dates

Yearly: 2018, 2019, ...

Quarterly (CY): Q1, Q2, Q3,...

Monthly: January, February,...

(None)

☒ Show at top ☐ Show at bottom ☐ Align month start with week starting day

Date Headings

Start Freq Background Effects Target Color Prefix Suffix

View

Zoom: Fit in Window

Page View: Normal

Chart Type: Gantt - Normal View

Viewing Options

Gantt - Normal View

Gantt - Roll-Up to Single Bar

Gantt - Roll-Up to Multiple Bars

Gantt - Calendar View

Gantt - Duration View

Gantt - Percent Complete

Gantt - Logarithmic: View

Gantt - Logarithmic: Setup

2021

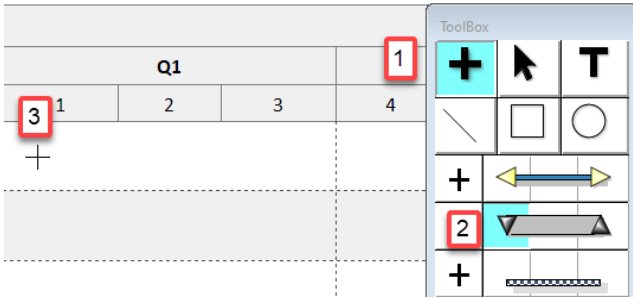
Q1 Q2 Q3 Q4

2 3 4 5 6 7 8 9 10 11 12

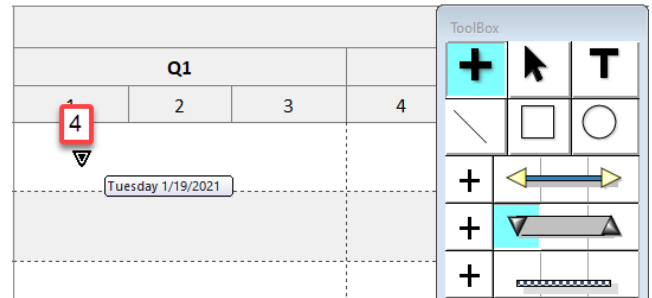
Logarithmic Headings Choose the **View** tab - In the **Viewing Options** section - Choose the down arrow under **Chart Type** - Choose **Gantt- Logarithmic SetUp**.

After set up is complete choose **Gantt- Logarithmic View** . You can switch back and forth between views.

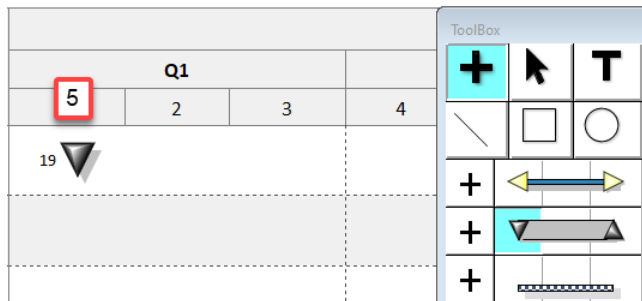
## Add a SYMBOL to your schedule



1. Click the **Big Plus** tool.
2. In the toolbox click the **Symbol** to be added.
3. Move the cursor to the schedule area.



4. Left **Click and** hold the mouse button, **Drag** to the symbol's date.

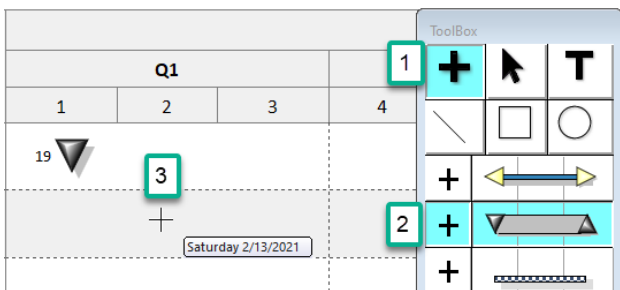


5. Let go of the mouse.

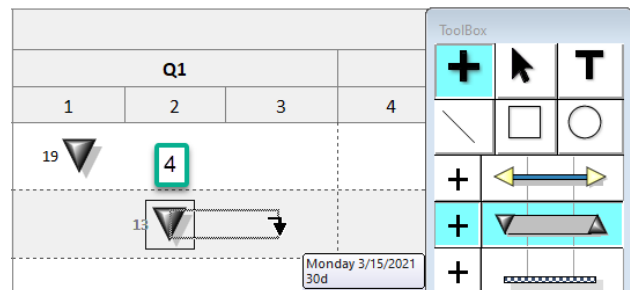
Symbols and/or symbol-horizontal bar-symbol combinations can be added to a schedule using Start Date, End Date, Baseline Start Date and Baseline End Date columns.

Select the SmartColumn Heading to set up the symbols and horizontal bars to be used. [Click Here](#) for more information.

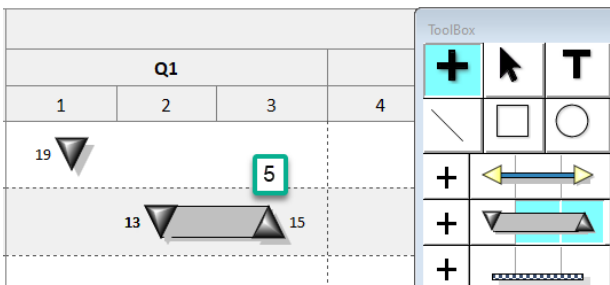
## Add a SYMBOL-HORIZONTAL BAR-SYMBOL combination to your schedule



1. Click the **Big Plus** tool.
2. Click the **Small Plus** next to the symbol-horizontal bar-symbol combination to be added.
3. Move the cursor to the schedule area.



4. Left **Click** (the first symbols will display) **and** hold the mouse button, **Drag** to the second symbol's date.



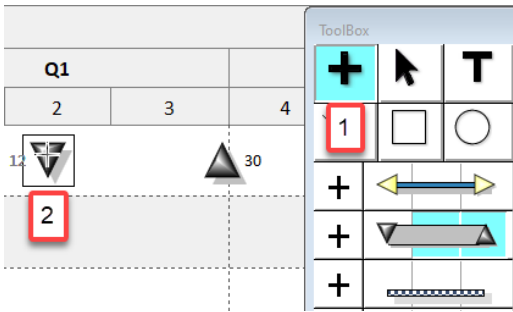
5. Let go of the mouse.

For a symbol bar-horizontal-bar symbol combination to look like just a bar on the schedule. Set up a combination in the toolbox with symbol style # 28 or #33 (**null symbols**) on the left and right of the horizontal bar of your choice.

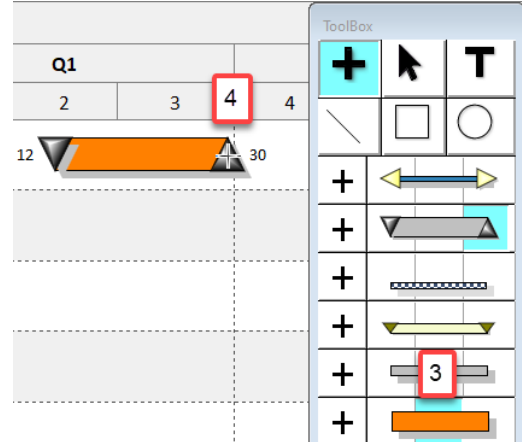


## Add a HORIZONTAL BAR between two existing Symbols on your schedule

Horizontal Bars are connections (dependencies) between symbols on the same task row.

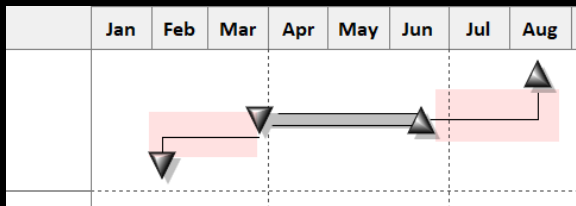


1. Click the **Big Plus** tool.
2. On the schedule click the **Start Symbol** for the horizontal connection.

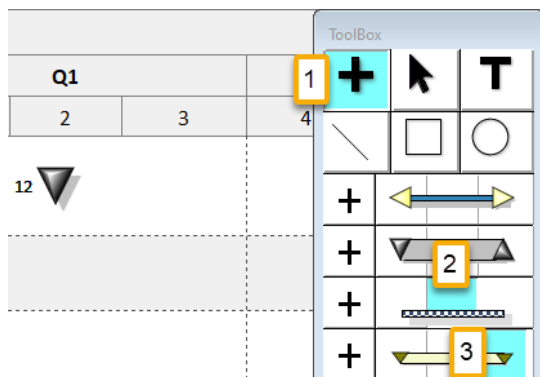


3. In the toolbox click the **Horizontal Bar** to be used.
4. On the schedule click the **Symbol to Complete** the horizontal connection.

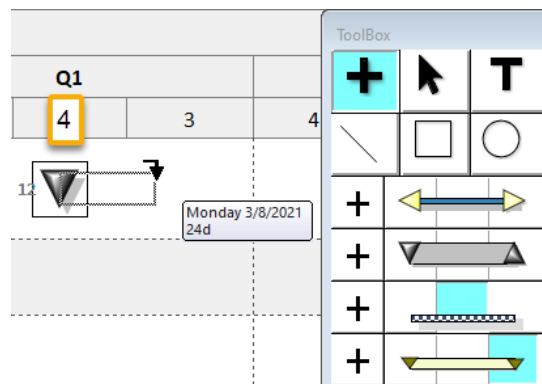
Because symbols can be at different levels on a single task row there are several **Horizontal Bar types (43, 44, 45, 46)** in the toolbox that allow a vertical connection look within a task row.



## Add a HORIZONTAL BAR AND SYMBOL to a Symbol on your schedule



1. Click the **Big Plus** tool.
2. Click the **Horizontal Bar** to be added.
3. Click the **Symbol** to be added.



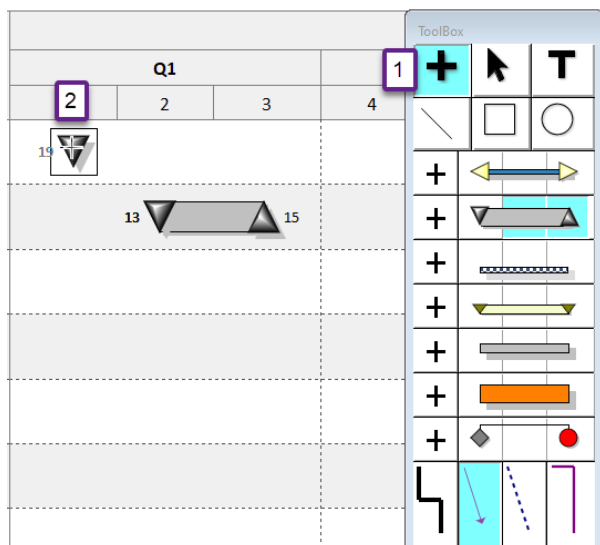
4. On the schedule, left **Click** the **Symbol** that the horizontal bar and symbol will be added to. Continue to hold the mouse button, **and Drag** to the symbol's date.



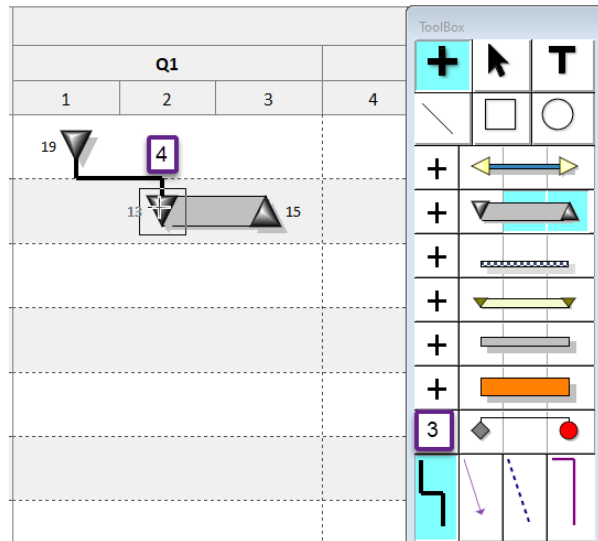
5. The **Result**.

## Add a VERTICAL LINK to your schedule

Vertical links are connections (dependencies) between symbols on different task rows.



1. Click the **Big Plus** tool.
2. On the schedule click the **Start Symbol** for the vertical connection.

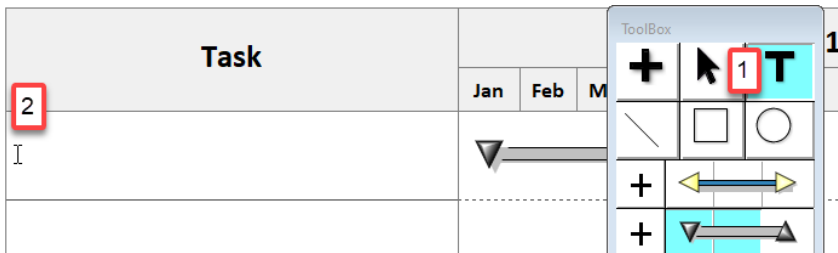


3. In the toolbox click the **Vertical Link** to be used.
4. On the schedule click the **Symbol to Complete** the vertical connection.

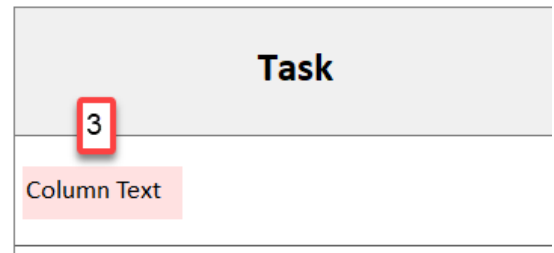
Vertical links can also be added to a schedule using the toolbar and the Insert tab. [Click Here](#) for more information.



## Add COLUMN TEXT to your schedule



1. Click the **Text** tool.
2. On the schedule **Click** in a **Columns Cell** the cursor will flash.

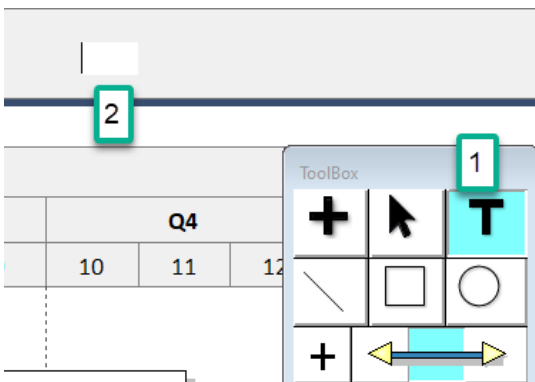


3. Begin **Typing**.

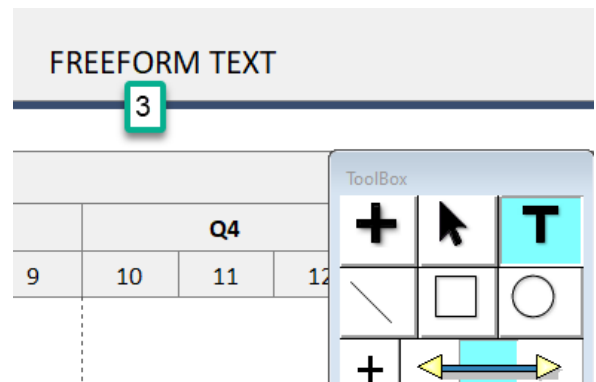
Column text characteristics can be globally set on the **Format** tab in the **Default Text** section or individually by selecting the column. The toolbar is now active for the column, make change to the characteristic of column text in the toolbar.

## Add FREEFORM TEXT to your schedule, then Format it

FreeForm text can be added anywhere on the schedule. It is static thus it will not move when the schedule is adjusted.

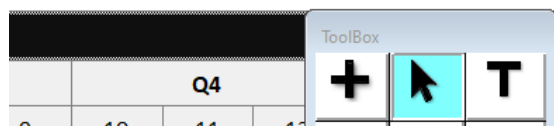


1. Click the **Text** tool.
2. **Click anywhere** on the schedule, the cursor will flash.



3. Begin **Typing**.

### FREEFORM TEXT



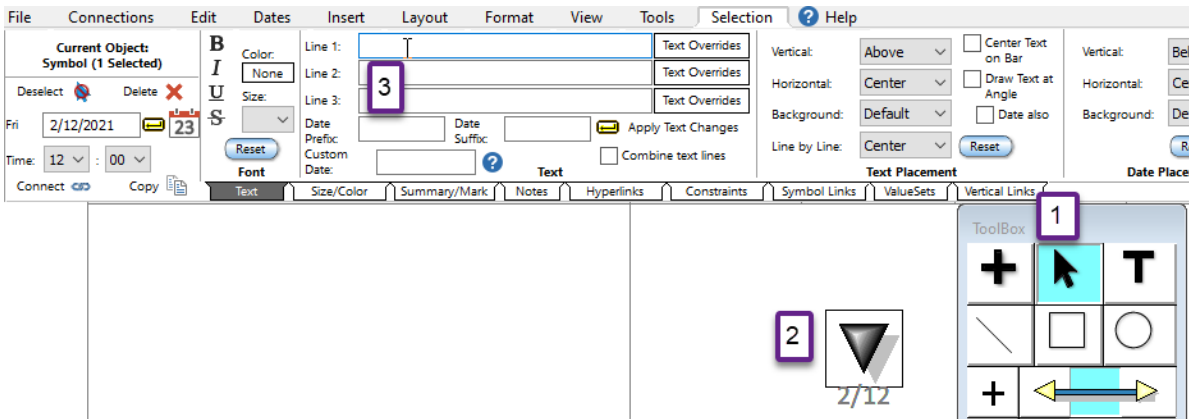
1. Click the **Text** tool.
2. **Click** the freeform text block. The toolbar is now active for the freeform text, make change to the characteristic of freeform text in the toolbar.

Globally set freeform text characteristics on the **Format** tab in the **Default Text** section.

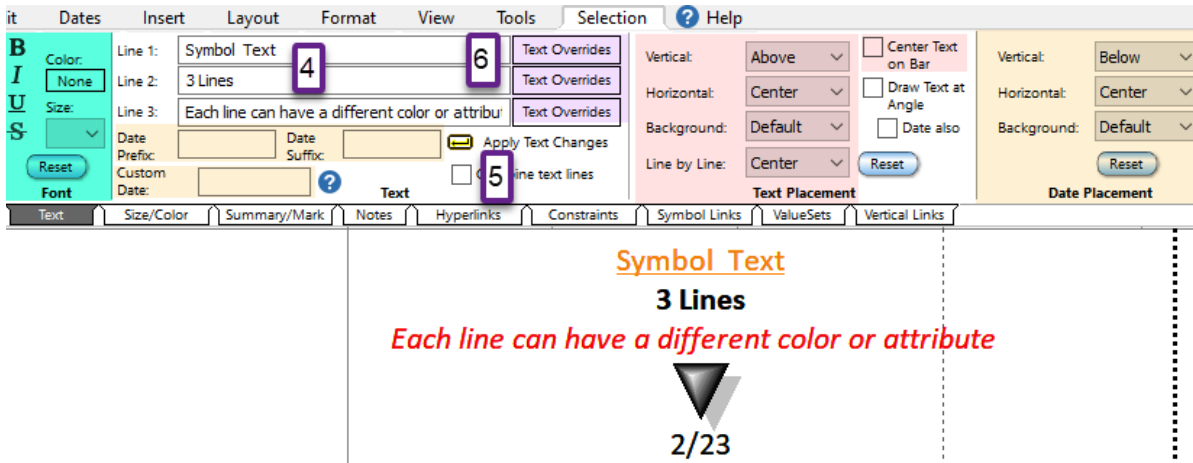
Add the schedule date, computer time and/or date, file name, page number anywhere on the schedule using Substitutable FreeForm text . [Click Here](#) for more information.

## Add SYMBOL TEXT to your schedule

Each symbol can have up to three lines of text.



1. Click the **Arrow** tool.
2. Click the **Symbol** to have text. The toolbar is now active for that symbol.
3. Move the cursor to the **Text** section next to **Line 1**: click.



4. Start **Typing**.
5. Important, select the **Apply Text Changes** button to have the text display on the symbol.
6. Choose the **Text Override** button for a line to change that line's text color and/or attributes.

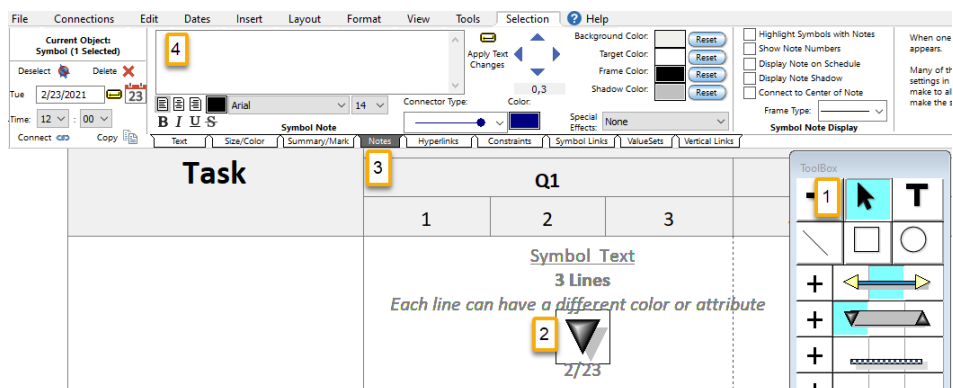
In the active toolbar for the symbol, change the Symbol Text's **Color**, **Attributes** and/or **Size** for the selected symbol. These changes also effect the symbol date. Note, these options are overridden by the **Text Overrides** options.

Also change the **Text Placement** around the selected symbol. If the symbol is the start of the symbol-horizontal bar-symbol combination and text is to be centered on the bar check on **Center Text on Bar**.

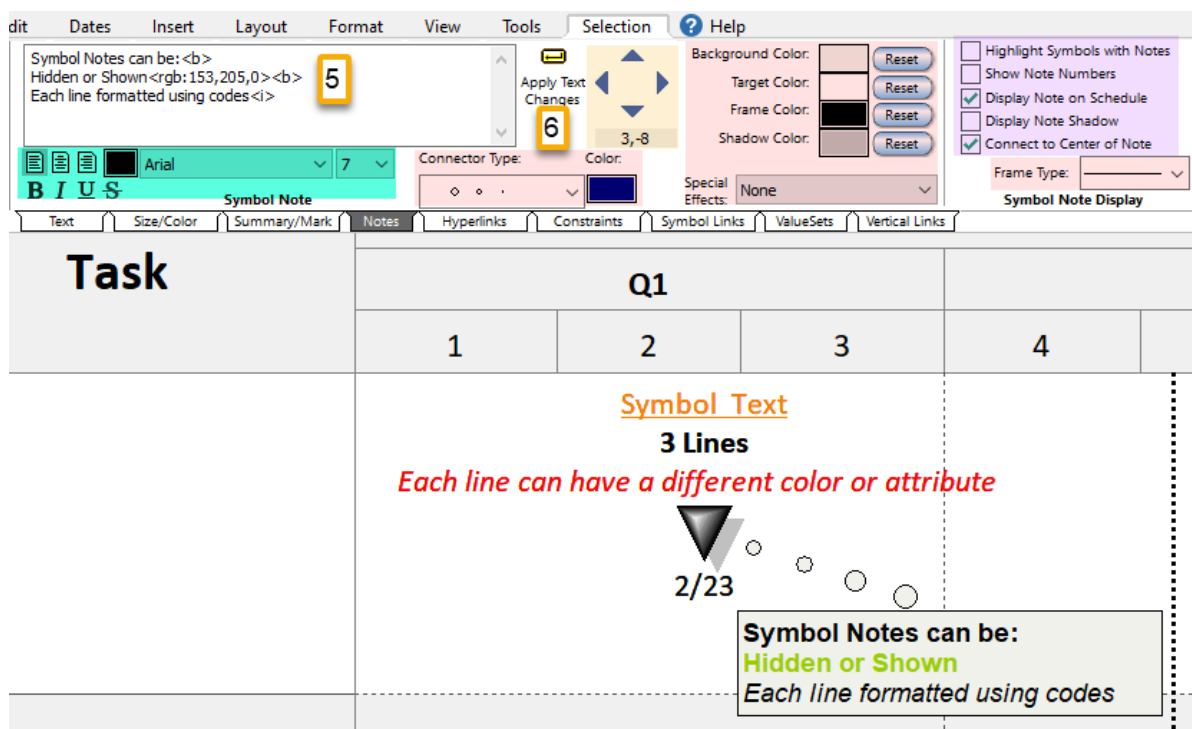
Also change the **Date Placement** around the selected symbol. Add a **Date Prefix** and/or **Suffix**. Set a **Custom Date** format.

Globally set symbol text characteristics on the **Format** tab in the **Default Text** section.

## Add SYMBOL NOTES to your schedule



1. Click the **Arrow** tool.
2. Click the **Symbol** to have a note. The toolbar is now active for that symbol.
3. At the bottom of the toolbar select the **Notes** tab.
4. Move the cursor to the **white block**.



5. Start **Typing**.
6. Important, select the **Apply Text Changes** button to have the text display on the symbol.

In the active toolbar for the symbol, change the Note's **Color**, **Attributes** and/or **Size** for the selected symbol.

Also change the Note's **Background coloring**, **effects**, **frame** and **connector type**.

Use the **Directional Arrows** to move the note anywhere on the schedule. Also, the toolbox arrow tool can be used to move the Note.

**Highlight** and/or **Number** symbol with a note. **Show** or **Hide** the note.

Globally set symbol note characteristics on the **Format** tab in the **Default Text** section.

Each line of a note can appear different by using codes. [Click Here](#) for more information.

## Add HORIZONTAL GRIDLINES AND SHADING to your schedule

Horizontal Gridlines and Shading can be set globally or individually (for a single task row or multiple task rows).

Milestones Professional

Page 1 of 1

Task	Q1			Q2			2021
	1	2	3	4	5	6	7

Milestones Professional

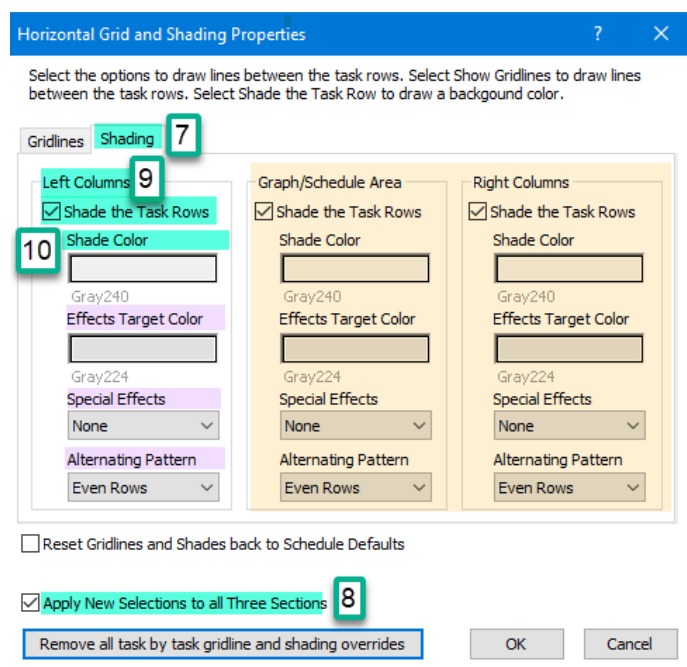
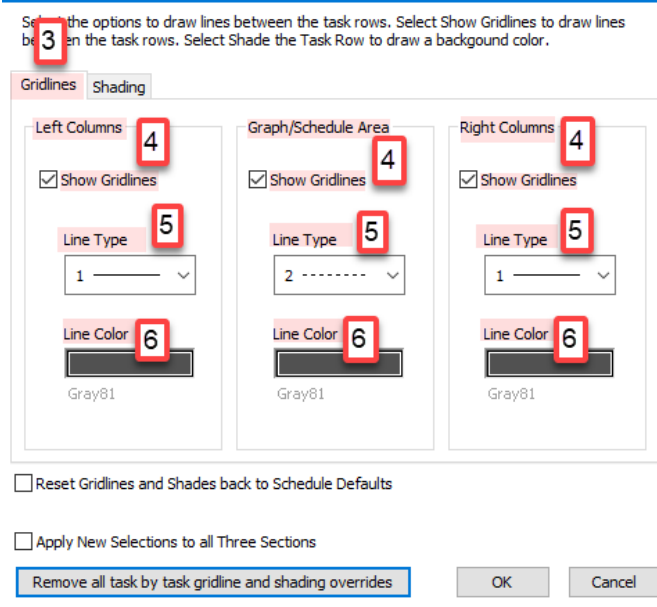
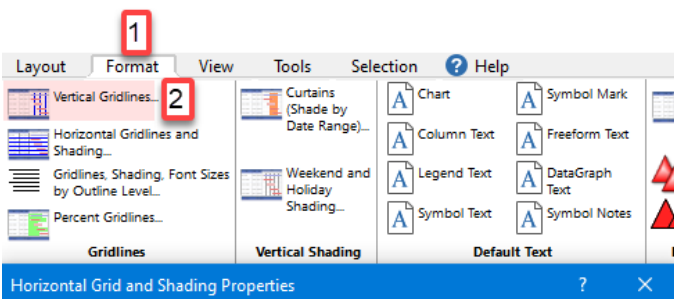
Page 1 of 1

Task	Q1			Q2			2021
	1	2	3	4	5	6	7

Milestones Professional

Page 1 of 1

Task	Q1			Q2			2021
	1	2	3	4	5	6	7



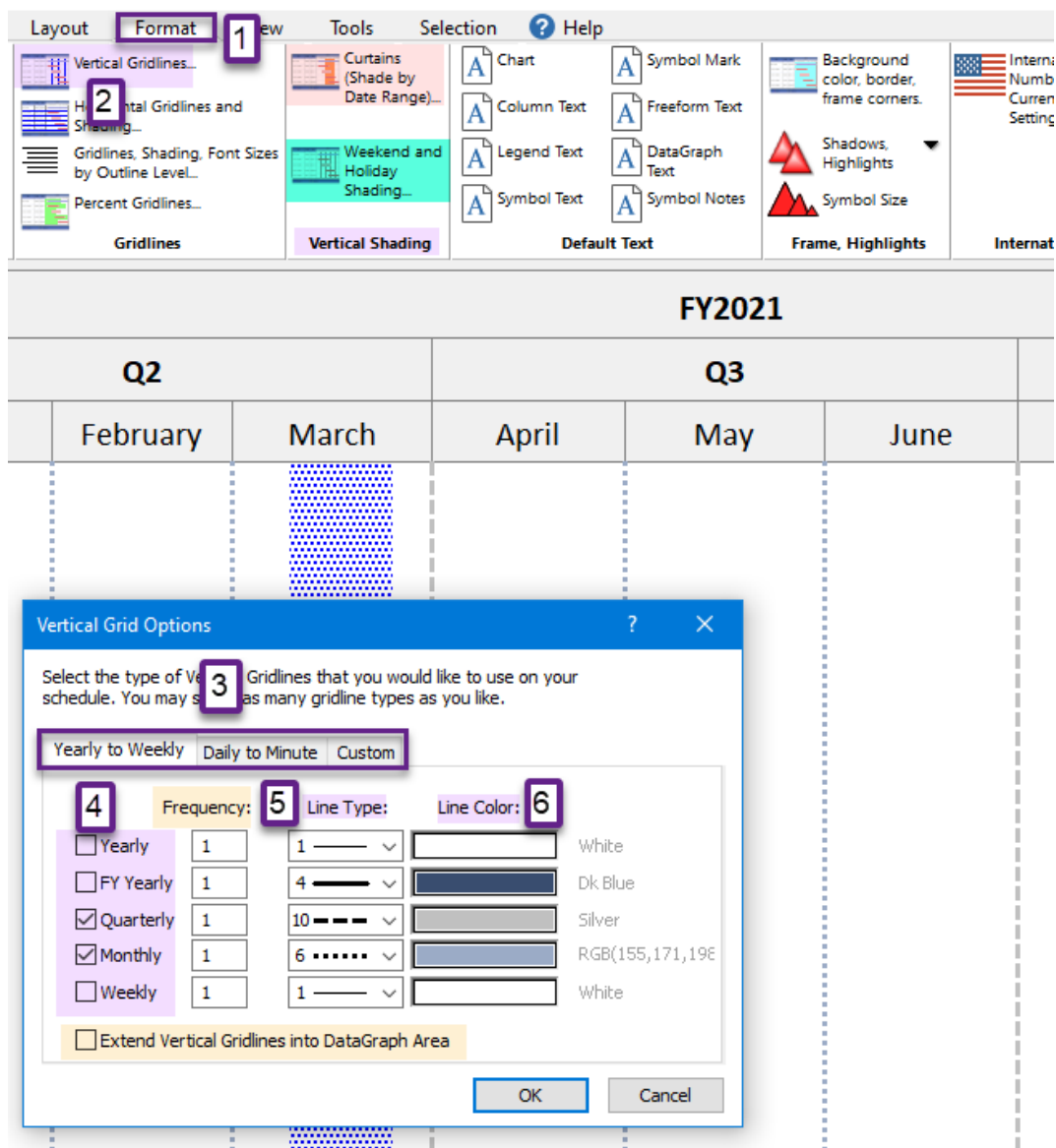
1. To globally set Horizontal Gridlines and Shading choose the **Format** tab.
2. In the Gridlines section choose **Horizontal Gridlines and Shading**.
3. Choose the **Gridlines** tab.
4. Check on **Show Gridlines** for the schedule's **Left Columns**, **Graph Schedule Area** and/or **Right Columns**.
5. Select the **Line Type** for each section.
6. Select the **Line Color** for each section.

7. Select the **Shading** tab.
8. Because each section of the schedule is to have the same shading options check on **Apply New Selection to all Three Sections**.
9. Under **Left Columns** check on **Shade the Task Rows**.
10. Select a **Shade Color**
11. Optionally choose **Effects Target Color** and **Special Effects** and/or **Alternating Pattern**.

Note: Once the **Left Columns** options are selected the **Graph/Schedule Area** and **Right Columns** will also have the same selections.

To individually set a single task row's or multiple task rows' Horizontal Gridlines and Shading, [Click Here](#) for more information.

## Add VERTICAL GRIDLINES to your schedule



1. Select the **Format** tab.
2. Select **Vertical Gridlines**.
3. Select **Yearly to Weekly**, **Daily to Minute** or **Custom** tab.
4. Check on the time increment for the vertical gridlines to display.
5. Select the **Line Type**.
6. Select the **Line Color**.
7. Optionally ,select **Frequency** or **Extend Vertical Gridline into DataGraph Area**.

The blue vertical shading in the picture above, is a curtain. Saturday and Sundays can also be shaded. Find these options on the **Format** tab in the **Vertical Shading** section, choose **Curtains (Shade by Date Range)** and/or **Weekend and Holiday Shading**.

Curtains can also be displayed on task row(s).  
[Click Here](#) for more information.

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## Quick ADDS to your schedule

**Schedule Title:** *Insert* tab → *Title* section select → *Inset/Edit Chart Title*

**Current Date:** *Dates* tab → *Current Date* section → check on *Display Date* (will display in upper right corner of schedule). Once the date is on the schedule, select it to activate the toolbar to changes the dates characteristics.

To place the Date anywhere on the schedule, choose the T (Text) Tool in the toolbox and type &date.

**Current Date Line:** *Dates* tab → *Current Date* section → check on *Display Date Line*

**Different Date Range on a Page:** *Dates* tab → *More Date Settings* section → choose *Page by Page Date Range Overrides* → enter a *Starting Date* and *Ending Date* next to *Current Page Override*

**Page:** *Insert* tab → *Page* section → select *Insert a New Page Before the Current Page* or *Insert a New Page After the Last Page*

**Page Number:** *View* tab → *Optional Item* section → check on *Page Number* (will display in upper left corner of schedule). Once the Page Number is on the schedule, select it to activate the toolbar to changes the Page Numbers characteristics.

To place the page number anywhere on the schedule, choose the T (Text) Tool in the toolbox and type &curpage .

**Picture:** *Insert* tab → *Picture,Legend* section → select *Picture from File*

**Legend Entry:** *Insert* tab → *Picture,Legend* section → select *Legend Entry*

**Task Row:** In the column area, select the task row below the task row to be inserted → select the *Insert* tab → in the *Row,Columns* section → select *New Task Row*

**Password:** *File* tab → *Files and Templated Open and Save Options* section → select *Password*

**Page Break:** *Insert* tab → *Page Breaks* section

**Bookmark:** *View* tab → *Page Navigation* section → select *Bookmark*

**Baseline:** *Insert* tab → *Baseline, Datagraph, ValueSet* section → select *Insert or Remove a Baseline*

To set up the symbols and horizontal bar to be used for Baseline choose the *Layout* tab in the *Other* section choose *Baseline Settings*.