Milestones PROFESSIONAL® TUTORIALS

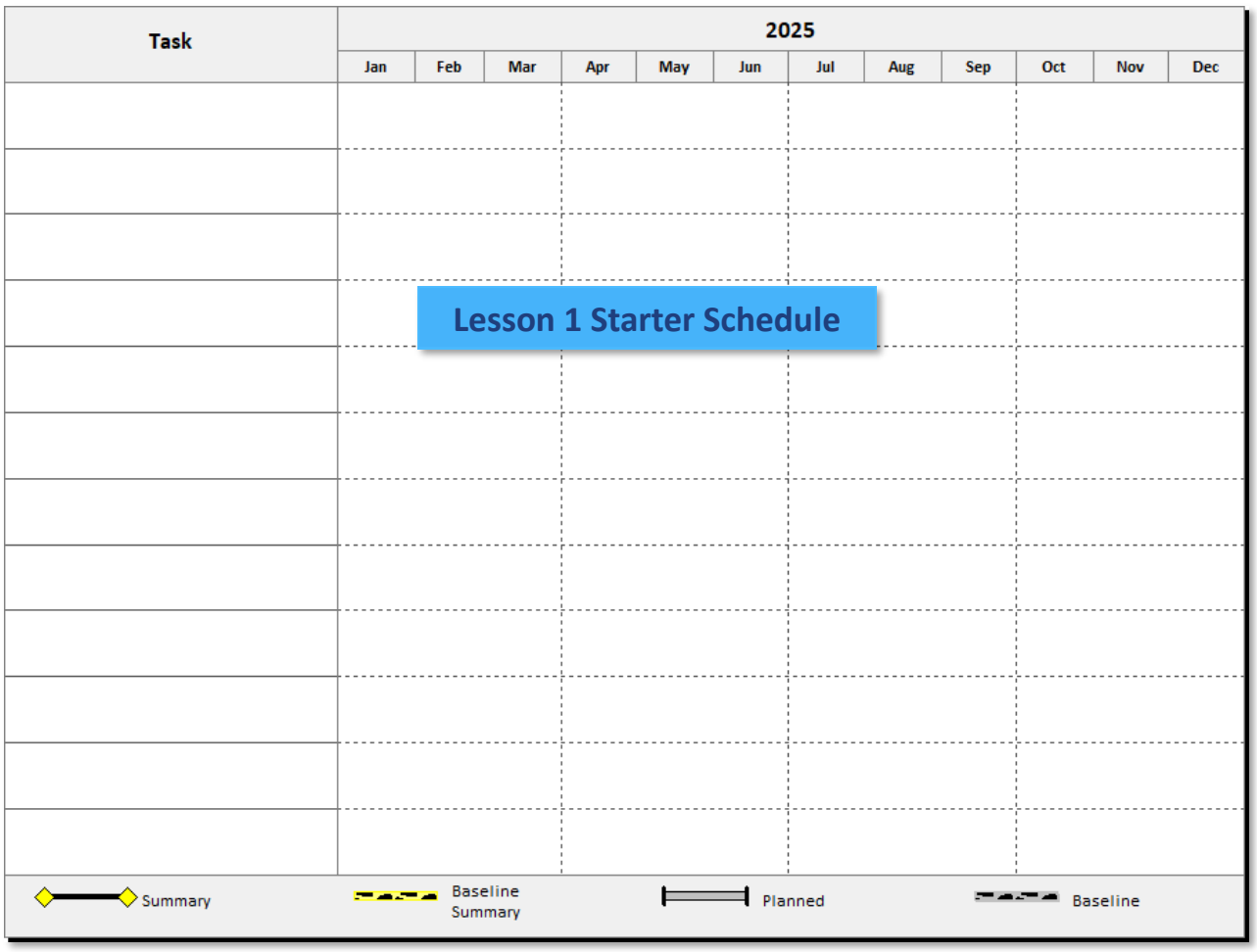
Lesson 1 Format a Schedule

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
- Insert a column
- Move a column
- Work with the schedule's legend
- Work with pages and page numbers
- Work with the schedule's current date
- Change horizontal gridlines and shading
- Change vertical gridlines

Open the schedule for this Lesson

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

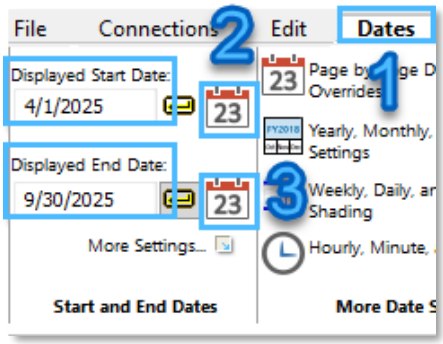


Change the schedule's date range

The current schedule's date is January 1, 2025 through December 31,2025. Change the schedule's start date to *April 1, 2025* and the end date to *September 30, 2025*.

2025											
Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sep	Oct	Nov	Dec

1. Choose the toolbar *Dates tab*.
2. In the *Start and End Dates* section, use the Calendar icon to change the Displayed Start Date to *4/1/2025*.
3. Use the Calendar icon to change the Displayed End Date to *9/30/2025*.



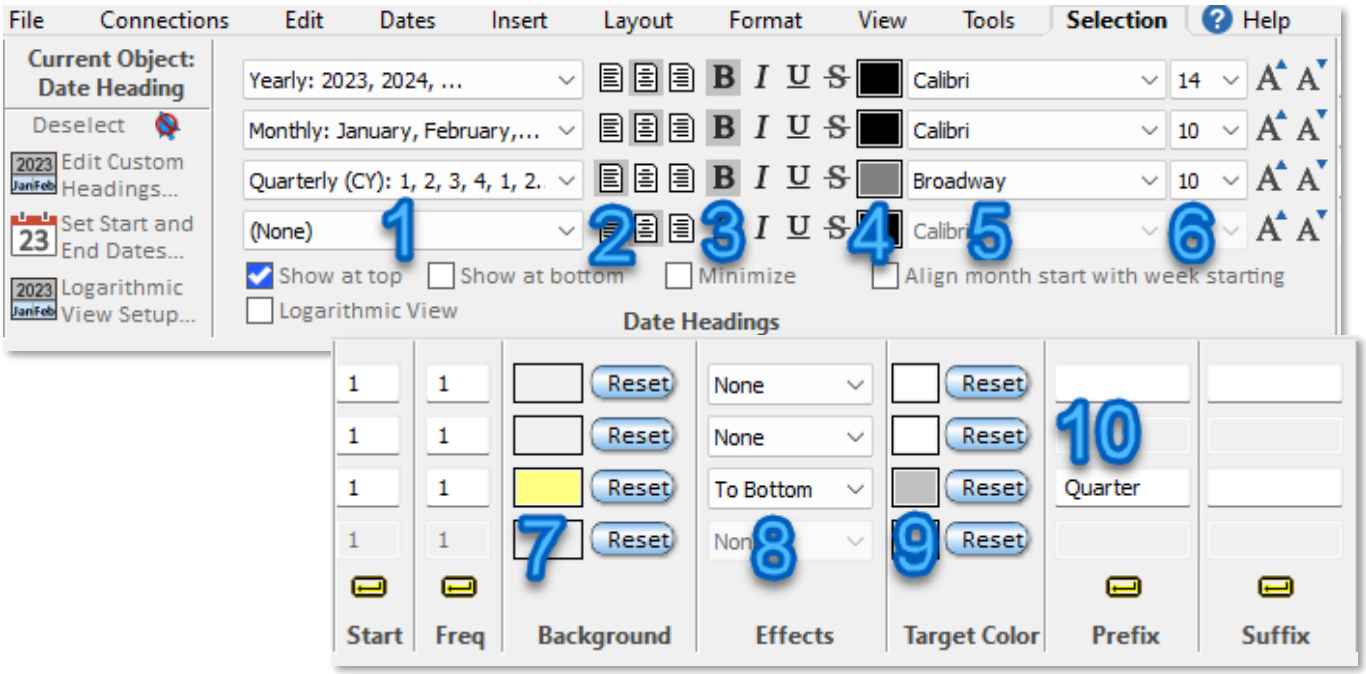
Changed Date Range

2025					
April	May	June	July	August	September

Change the schedule's date headings

Milestones includes many date heading formats (yearly, monthly, weekly…) There is also an easy way to define your own custom headings.

Click on the *2025 date heading*. It will highlight in black. The toolbar changes to the Selection tab with Current Object: Date Heading. This is where the date heading properties can be changed. Follow the numbered steps below to add a third date heading and set its properties.



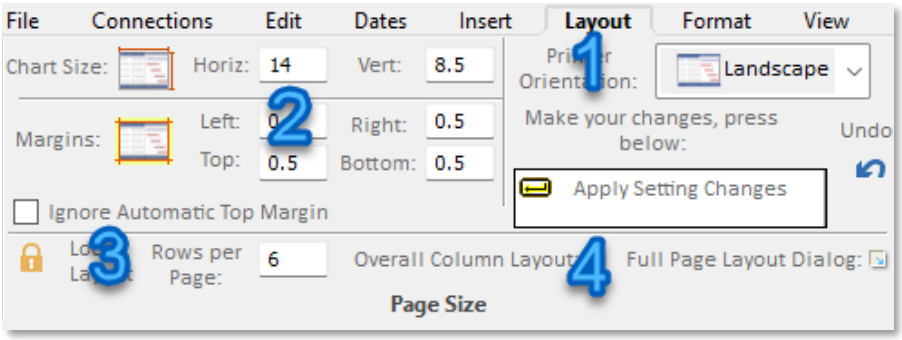
1. In the Date Headings section, in the third slot, choose *Quarterly (CY): 1,2,3,4,1,2,*.
2. Select *Left* justification.
3. Select the *(B) Bold* icon.
4. Click the color swatch to change the font color to *dark grey.*
5. Change the font to *Broadway*.
6. Change the font size to *10*.
7. In the Background section, *click the color swatch* and change the color to *Light Yellow.*
8. In the Effects section, choose *To Bottom.* Effects create a gradient from the Background color to the Target Color.
9. In the Target Color section, click the color swatch and change it to *Silver*.
10. In the Prefix section, type in *Quarter* and a space. Then press *the apply button* . The word *Quarter* is added in front of the quarterly number.

Changed Date Heading

2025					
April	May	June	July	August	September
Quarter 2			Quarter 3		

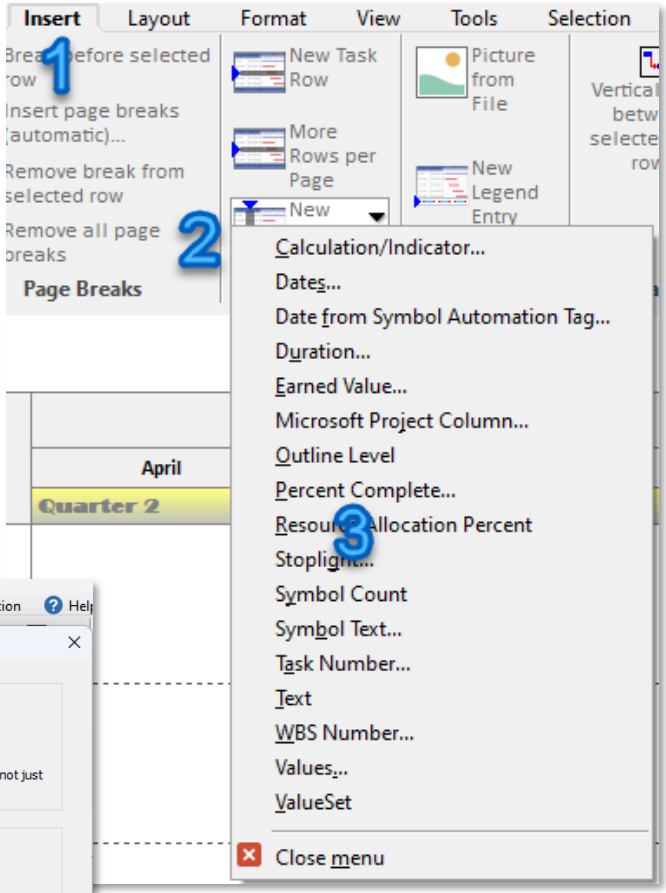
Change the schedule's dimensions

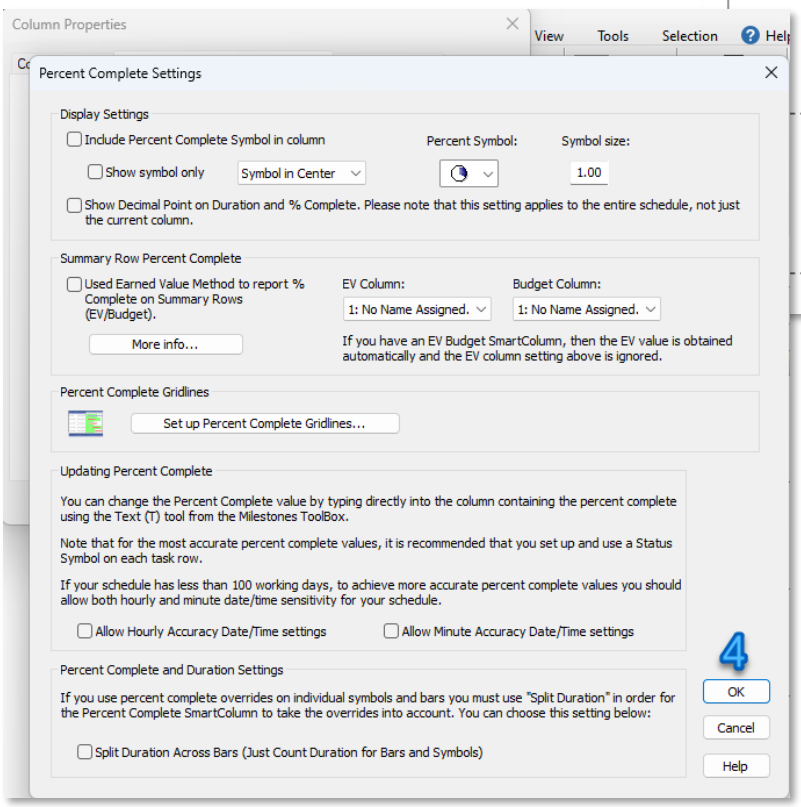
1. Choose the toolbar *Layout* tab.
2. In the Page Size section, change the Horiz. value to *14*.
3. Change the Rows per Page to *6*.
4. Press *Apply Setting Changes*. The schedule is now wider and has fewer lines.



Insert a column

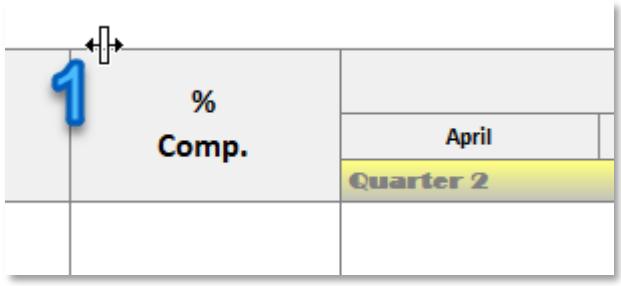
1. Choose the toolbar *Insert tab*.
2. In the Rows, Columns section, pick *New Column*.
3. In the drop down, select *Percent Complete*. (2 dialog boxes display containing customizable features for the Percent Complete column. SmartColumns display settings dialogs upon insertion.)
4. Make no changes in either dialog. Press *OK* to exit both dialog boxes. The Percent Complete column will insert between the Task Column and Schedule Area.

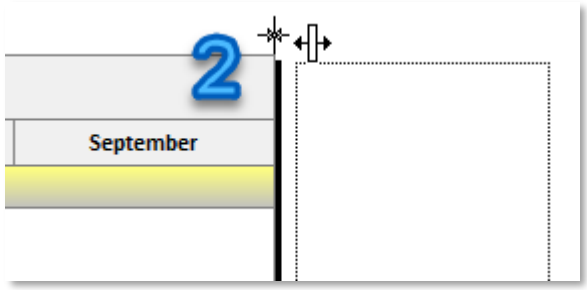


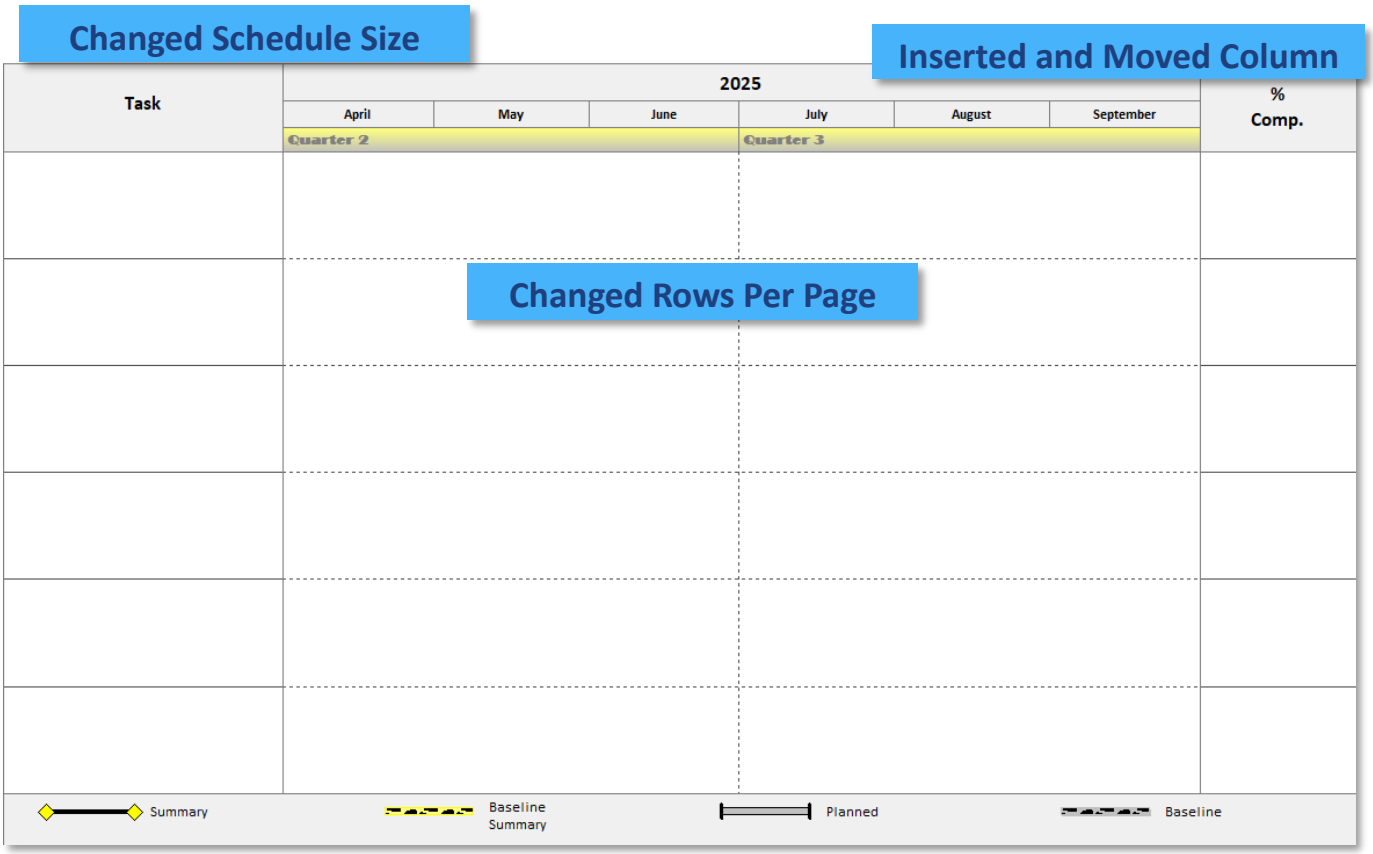


Move a column

1. Using ↖ (*the toolbox Arrow tool*), move the cursor to the left corner of the column, to be moved, until the cursor changes to the column move icon.
2. Click the left mouse button. Hold and drag the column to the other side of the schedule until the insertion icon displays. Let go of the mouse.



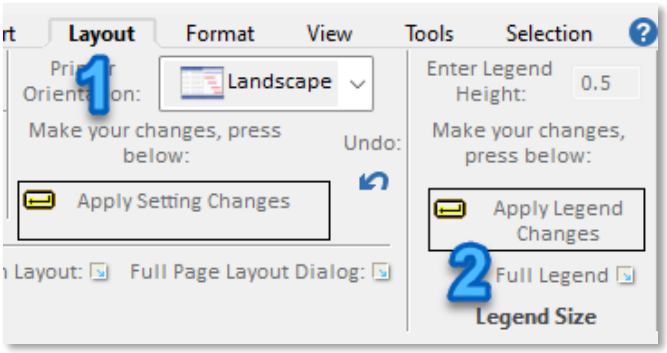




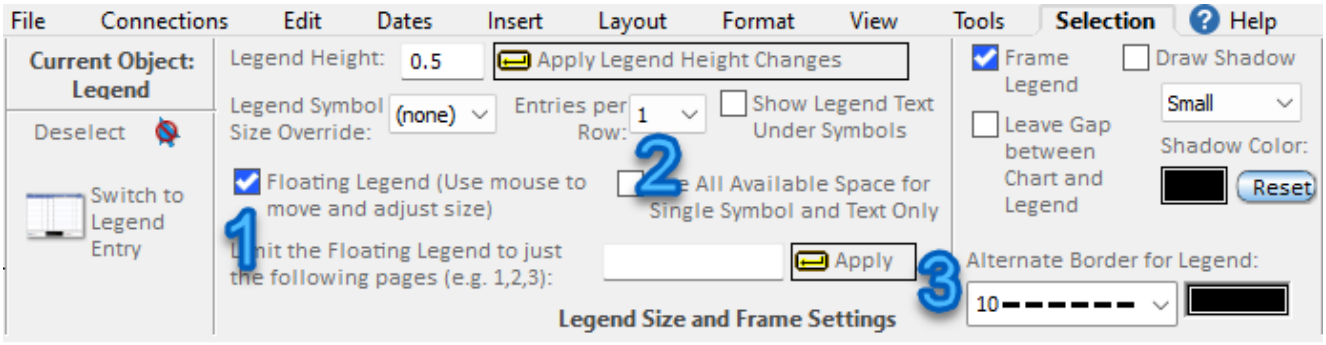
Work with the schedule's legend

Change legend properties

1. Choose the toolbar *Layout tab*.
2. In the Legend Size section, click *Full Legend*. The Toolbar changes to the Selection tab with all the legend properties.



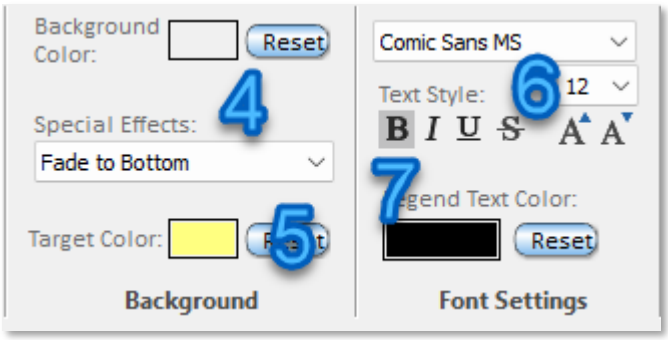
In the **Legend Size and Frame Settings** section:



1. ☑ *Floating Legend*.
2. Change Entries per Row to *1*.
3. Select option *10* for Alternate Border for Legend.

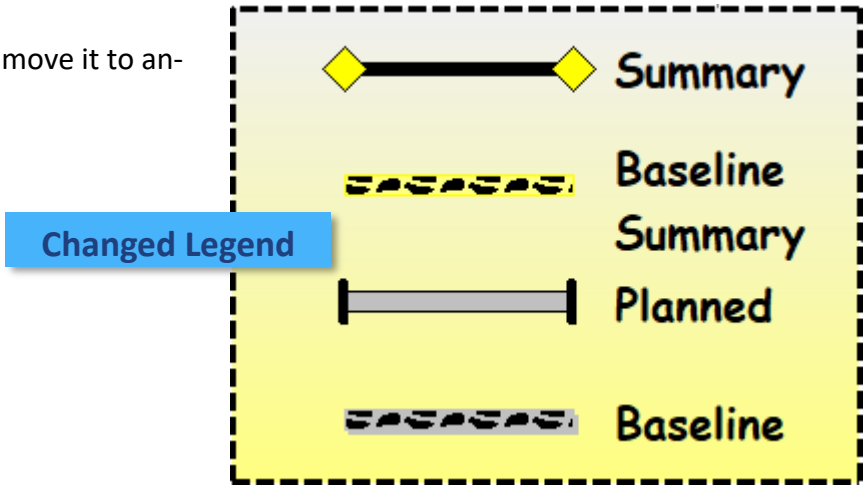
In the Background and Font Settings sections:

4. For Special Effects: select *Fade to Bottom*.
5. For Target Color: select *Light Yellow.*
6. Change the font style to *Comic Sans MS* or *Arial*.
7. For Text Style: select *(B) Bold* icon.



To Resize and Move the legend:

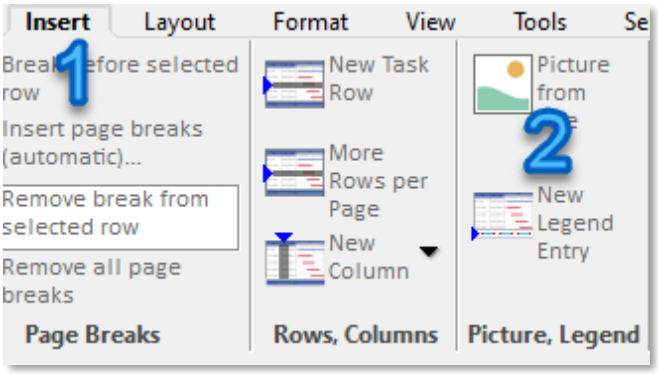
5. Click and Drag the corners of the legend to adjust its size.
6. Click and Drag on the legend to move it to another location on the schedule.



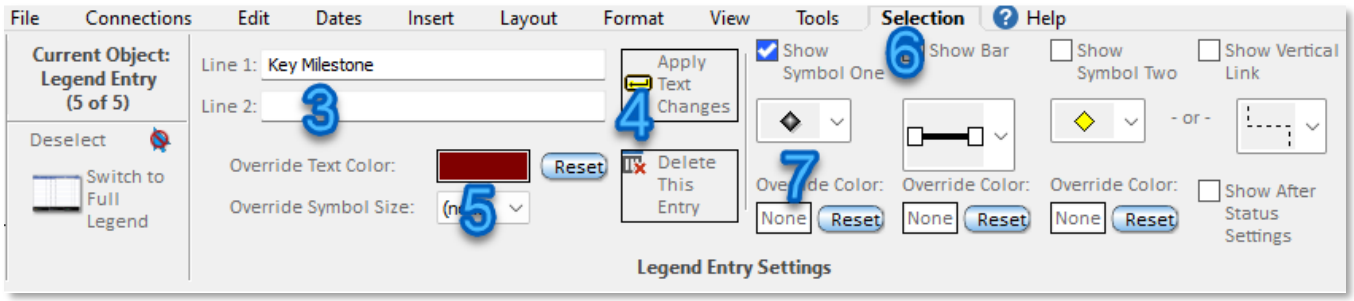
Work with the schedule's legend (continued)

Add a new Legend Entry

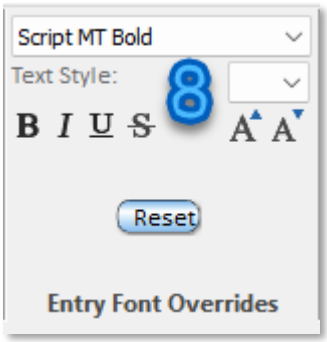
1. Click the toolbar *Insert tab*.
2. In the Picture, Legend section choose *New Legend Entry*. The Toolbar changes to the Selection tab with all options for that legend entry.



In the **Legend Entry Settings** section:

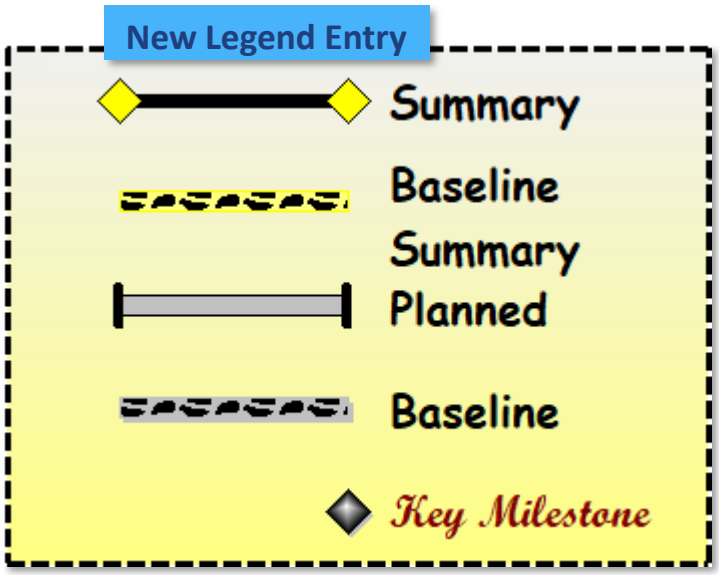


3. For Line1, enter *Key Milestone*.
4. Press *Apply Text Changes*.
5. For Override Text Color: select *Maroon*.
6. ☑ *Show Symbol One*.
7. Then, select the drop down and choose the *Black Diamond symbol* in the list.



In the Entry Font Overrides section:

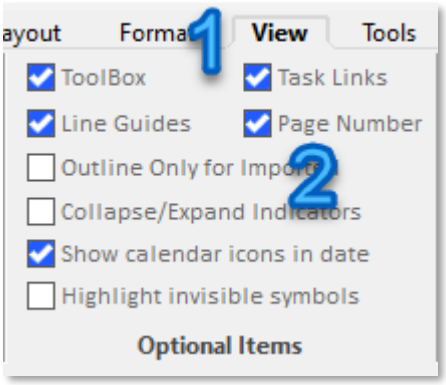
8. Select *Script MT Bold*.
9. Click and Drag the corners of the legend to adjust its size.

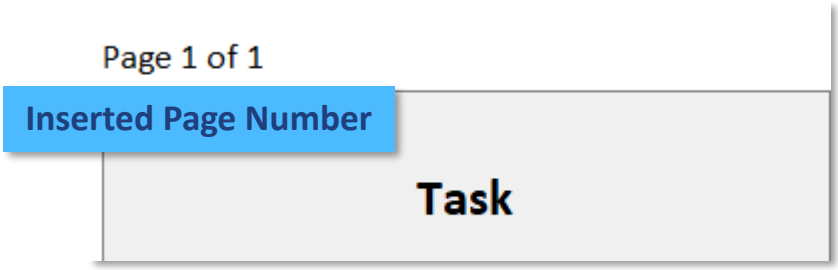


Work with pages and page numbers

Add page numbers

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

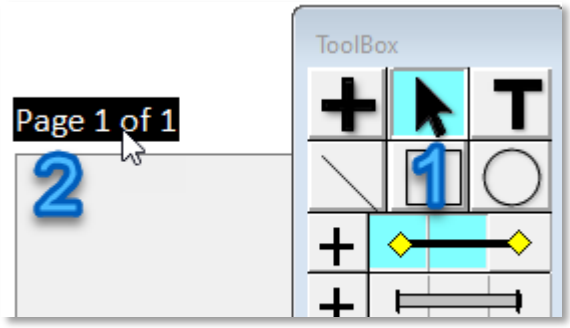




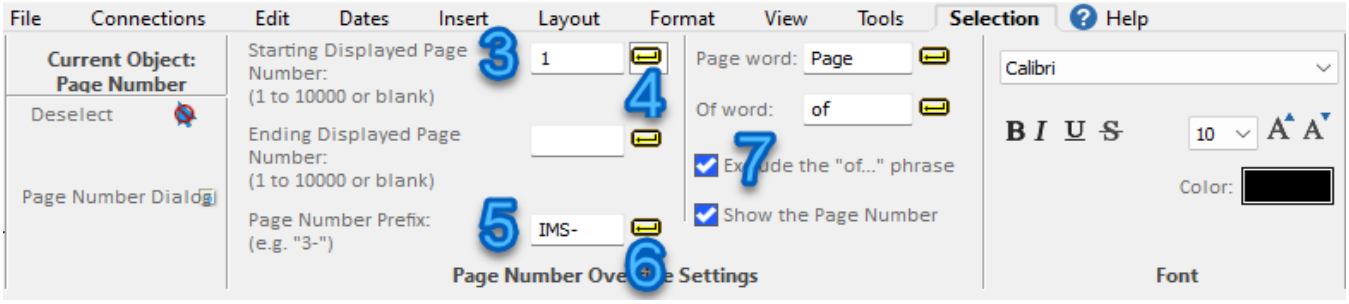
In a future lesson you will learn about **freeform text**. With freeform text, it's possible to put the page number anywhere on the schedule using **substitutable text,** like **&curpage.** In the **ToolBox**, select the (T) **Text** tool. On any part of the schedule's page, type: ***Page &curpage.***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

Change the page number properties

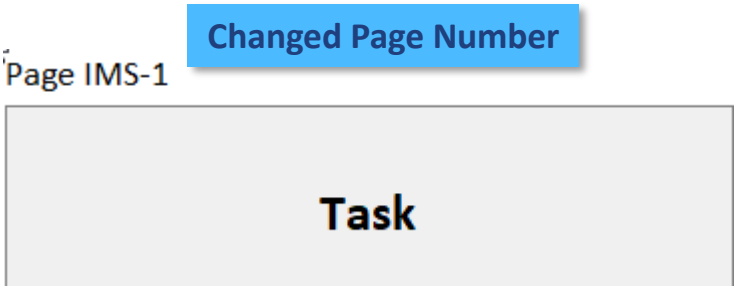
1. Select ↖ (*the toolbox Arrow tool*.)
2. Click on the page number. The **Toolbar** changes to the **Selection** tab with all the properties for the default page number.



In the *Page Number Override Settings* section



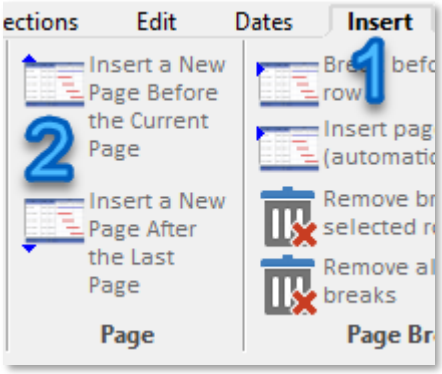
3. For *Starting Displayed Page Number* type in *1*.
4. Press ⏎ to apply the change.
5. For *Page Number Prefix* type in *IMS-*.
6. Press ⏎ to apply the change.
7. ☑ *Exclude the "of_" phrase*.



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 pages and page numbers (continued)

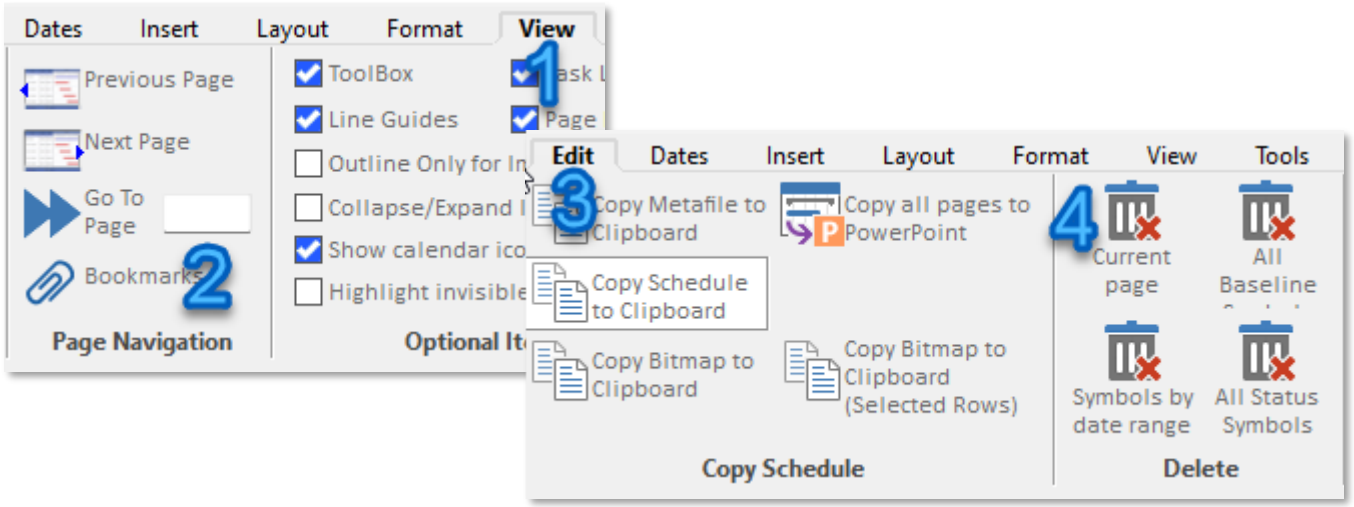
Insert a page



1. Choose the toolbar *Insert tab*.
2. In the *Page* section choose to *Insert a New Page before the Last Page* or *Insert a New Page after the Last Page*.

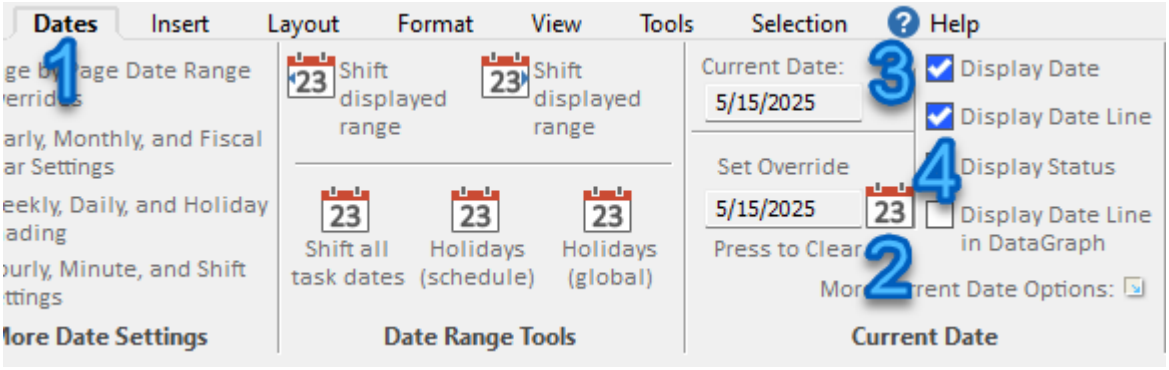
If adding a page you must enter text or symbol on that page before you save the file or the page not be retained.

Delete a page



1. Move to the page to be deleted using the Keyboard PgUp or PgDn keys or go to the *View* tab.
2. In the ***Page Navigation*** section for *Go To Page,* enter the page number to be deleted.
3. Once on the page to be deleted, choose the *Edit* tab.
4. In the **Delete** section choose *Current page*.

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 toolbar *Dates tab*.
2. In the *Current Date* section click the *calendar icon for Set Override*. Set the date to *May 15, 2025*.

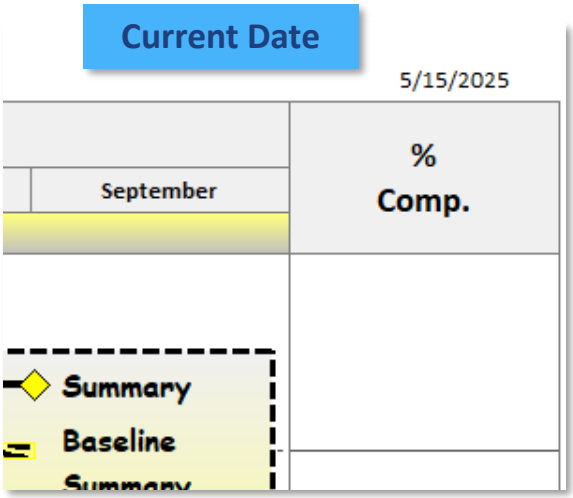
The override can be removed by clicking *Press to Clear*.

Show the current date

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

In a future lesson you will learn about **freeform text**. With freeform text, it's possible to put the current date anywhere on the schedule using substitutable text, like &date. In the ToolBox, select the (T) Text tool. On any part of the schedule type: *&date*.

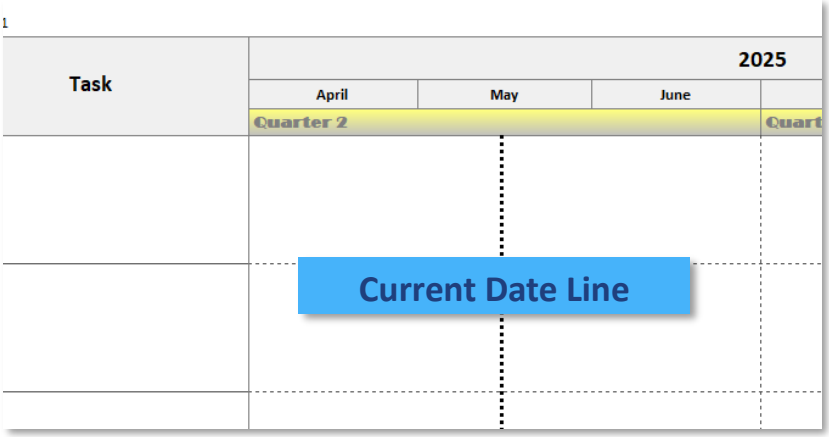
Learn more about Substitutable Text under the Help tab Help Topics.



Show the current date line

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

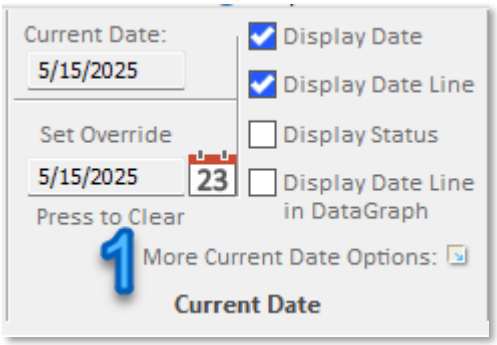
On the schedule, right-click the current date to hide the date or date line and change their properties.



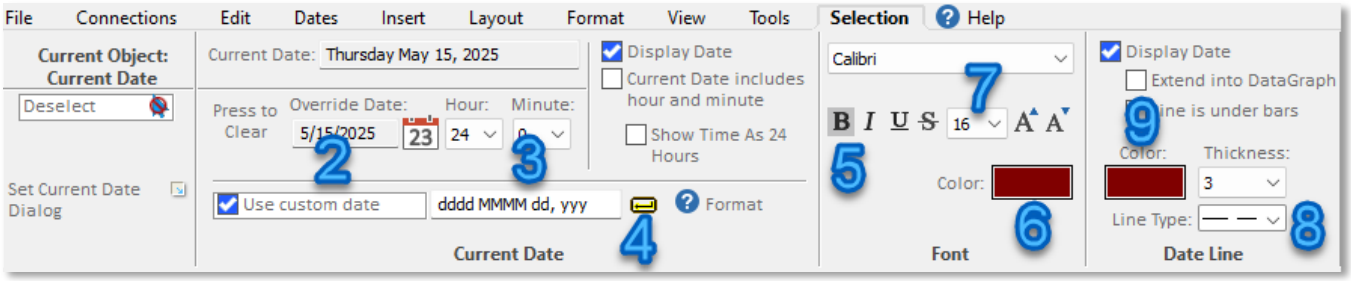
Work with the schedule's current date (continued)

Change the current date properties

1. In the *Current Date* section, click *More Current Date Options*. The *Toolbar* changes to the *Selection* tab which has all the properties for the current date. Follow the numbers to make changes.



> 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.



In the **Current Date** section:

2. ☑ *Use custom date format*.
3. Enter the following:
   dddd MMMM dd, yyy
4. Press ⏎ to apply the changes.

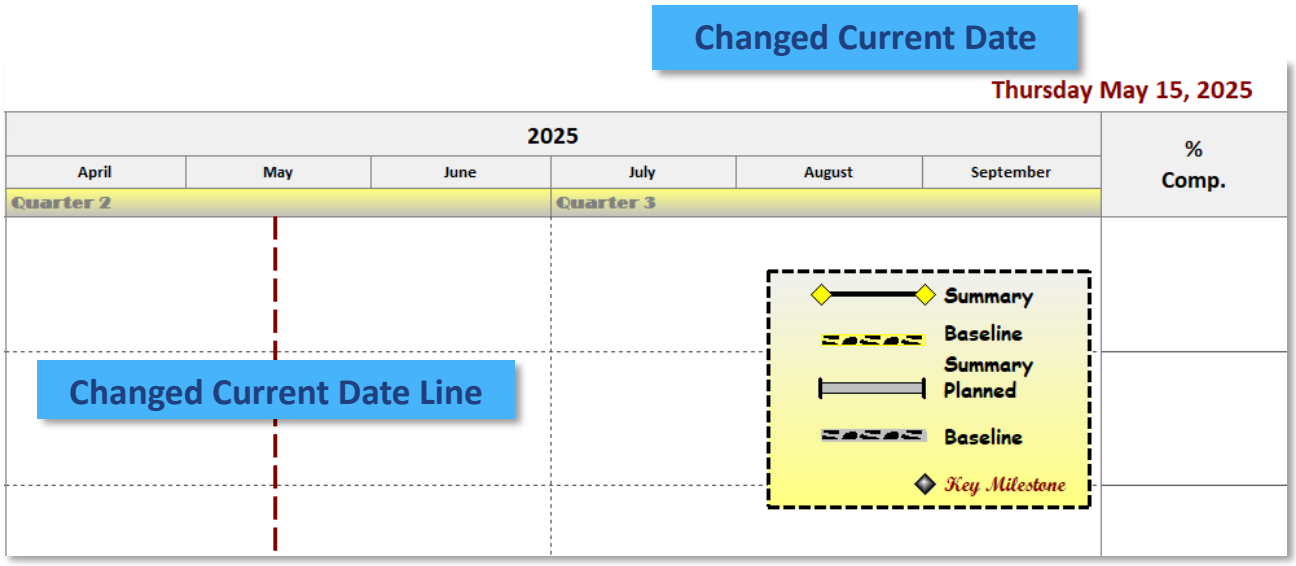
> Select Format to see other coding for custom date formatting.

In the **Font** section:

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

In the **Date Line** section:

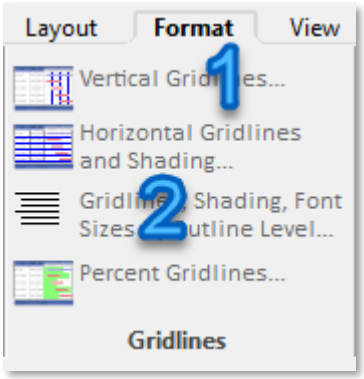
8. For *Line Type*, in the list of line types, pick the *first long dash option* in the list.
9. For *Color* choose *Maroon*.

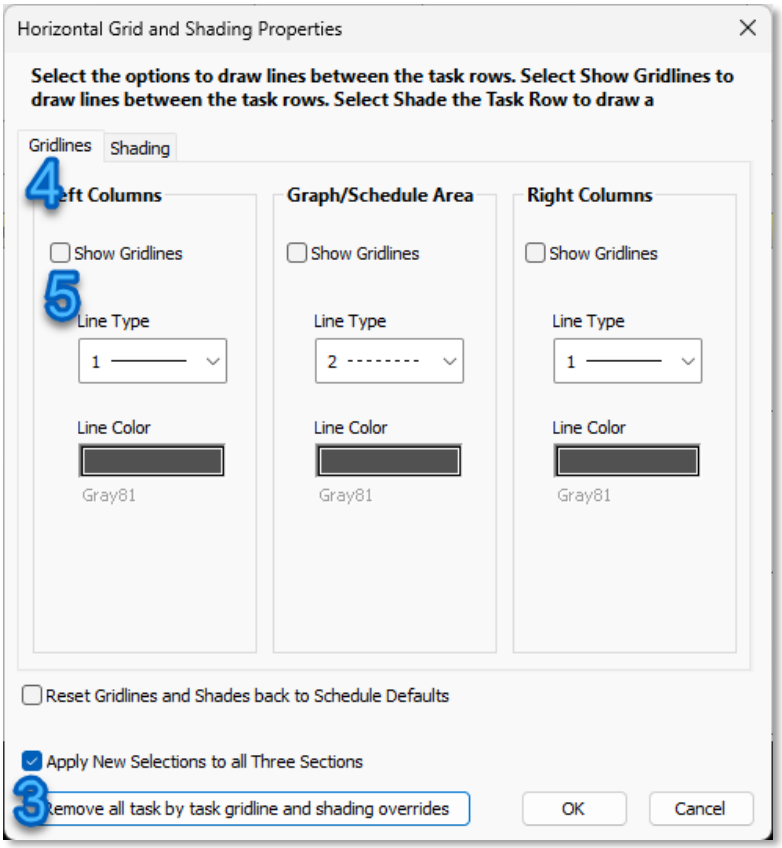


Change the horizontal gridlines and shading

Change the gridlines

1. Select the toolbar *Format tab*.
2. In the *Gridlines* section click *Horizontal Gridlines and Shading.* The Horizontal Grid and Shading Properties dialog displays.



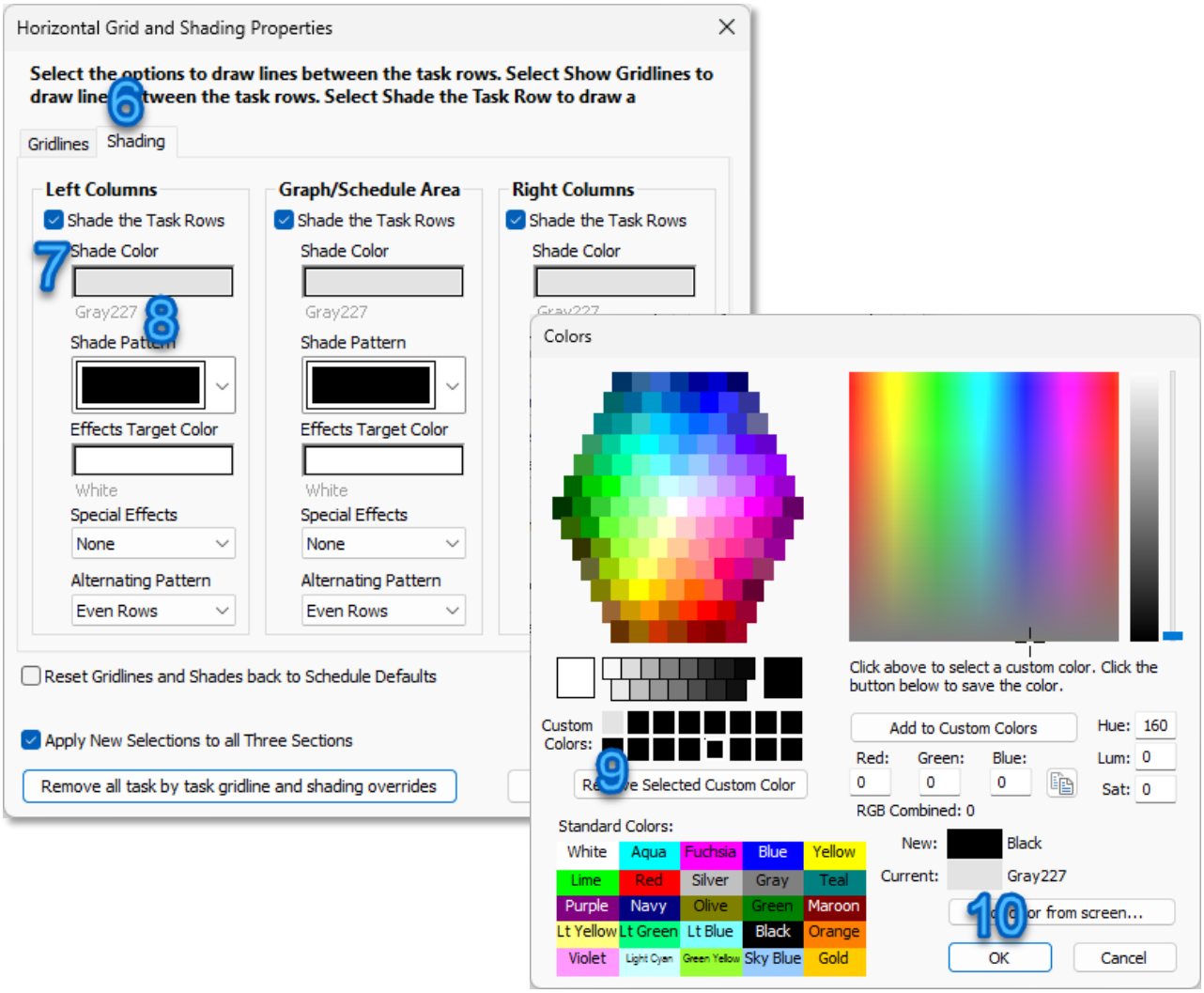


3. At the bottom of the dialog box, ☑ *Apply New Selections to all Three Sections*. When checked, selections made will apply to all three sections (Left Columns, Graph/Schedule Area and Right Columns.)
4. To turn off gridlines choose the *Gridlines* tab.
5. In the *Left Columns* section, uncheck *Show Gridlines*. (Graph/Schedule Area and Right Columns will also uncheck.)

Keep the dialog box open and continue to the next page to turn on shading.

Change the horizontal gridlines and shading (continued)

Change the Shading

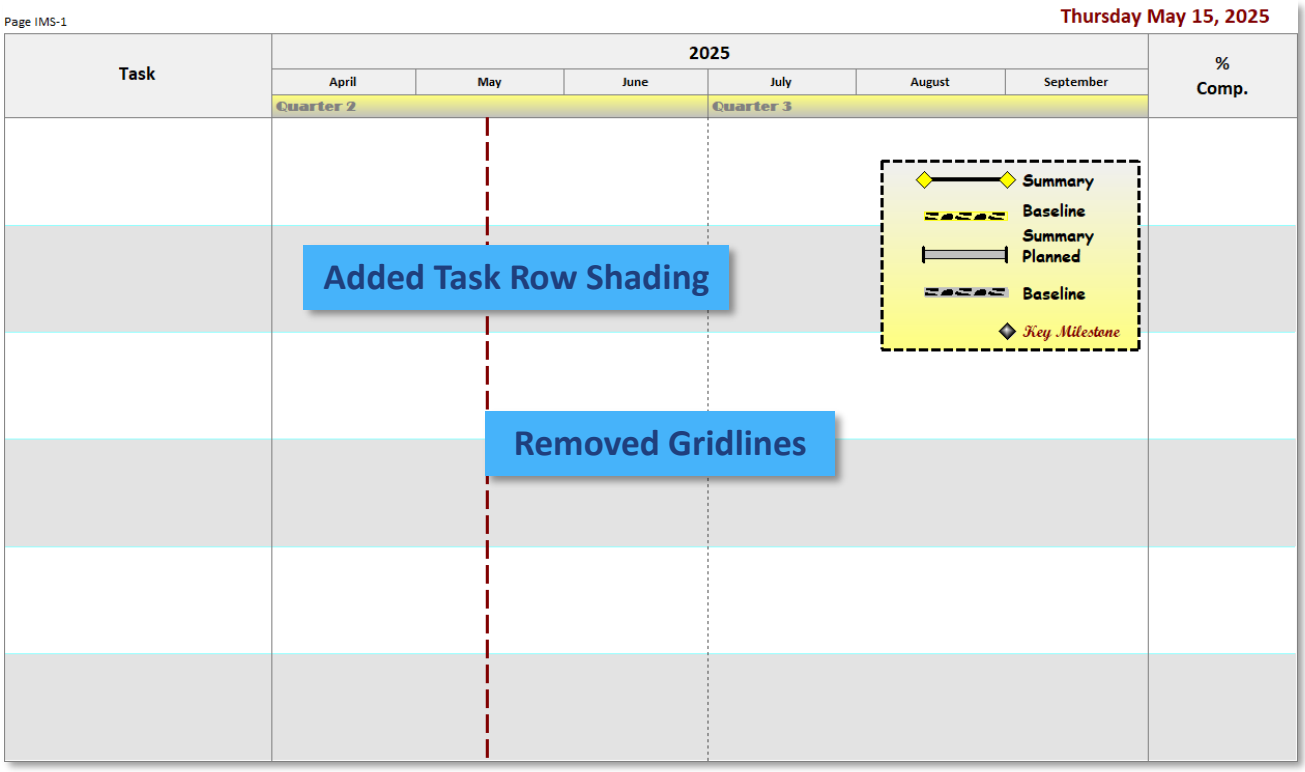


6. To turn on Shading choose the *Shading* tab.
7. In the Left Columns section, ☑*Shade the Task Row*. (Graph/Schedule Area and Right Columns will also check on.)
8. Click the *Shade Color* box. The Color dialog will display.
9. Under Left Columns select the *light gray color box in the Custom Color section.* (Graph/Schedule Area and Right Columns will also change.)
10. Choose *OK*.

Continue to the next page to see results.

Change the horizontal gridlines and shading (continued)

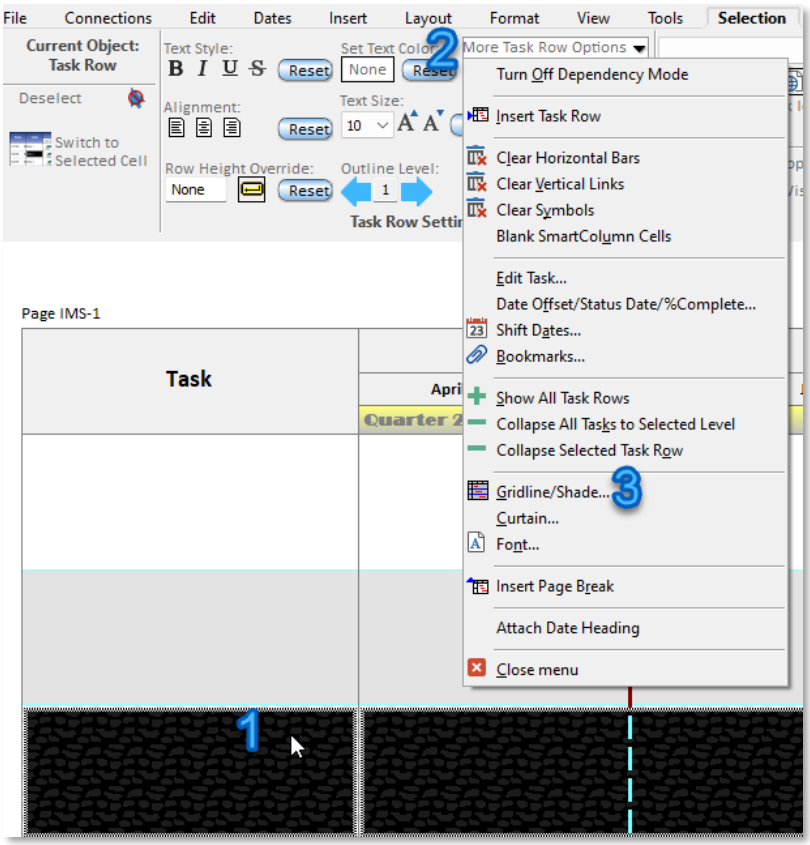
Result



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

Change the horizontal gridlines and shading (continued)

Change individual task row's gridline and shading



1. Select ↖ (*the toolbox Arrow tool.*) Under the heading Task, click once on the *third* task row to select it. The Toolbar at the top of the Milestones window changes to the Selection tab with Current Object: Task Row.

Select multiple task rows by holding down either ***Ctrl*** (non-contiguous task rows.) or ***Shift*** (contiguous task rows.)

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 ☑ *Shade the Task Rows*.

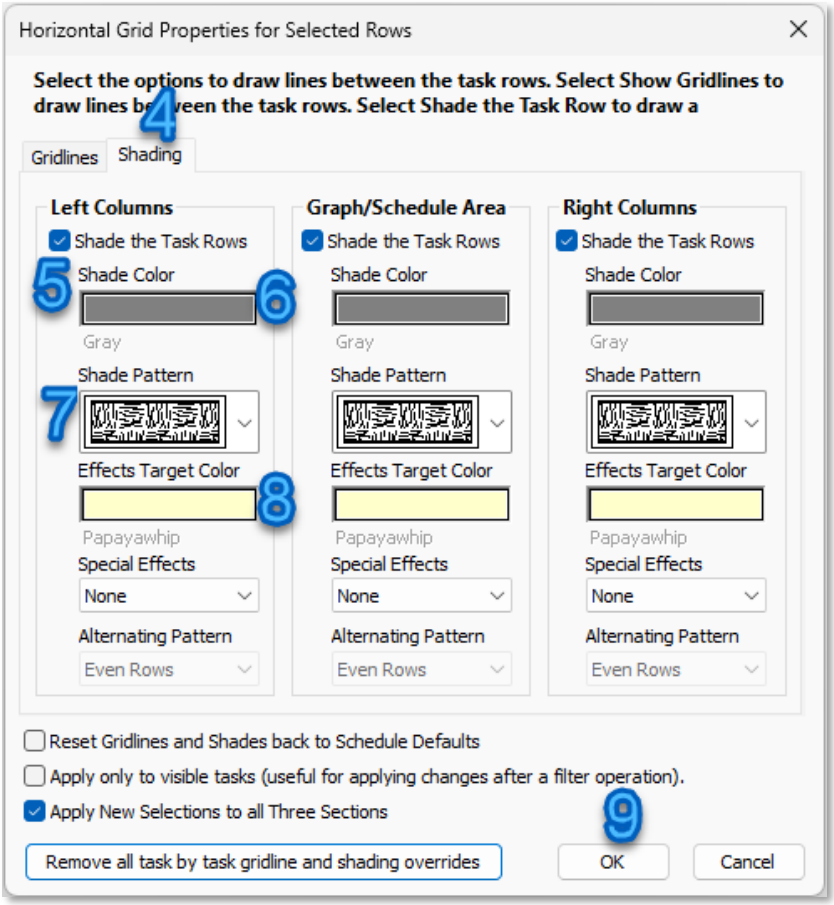
6. Under Left Columns section select *Shade Color* and set the color to *Dark Gray*.

7. Under Left Columns, for Shade Pattern select the *23rd pattern* (see #7)

8. Under Left Columns section select Shade Color and pick *light yellow*.

9. Choose *OK*.

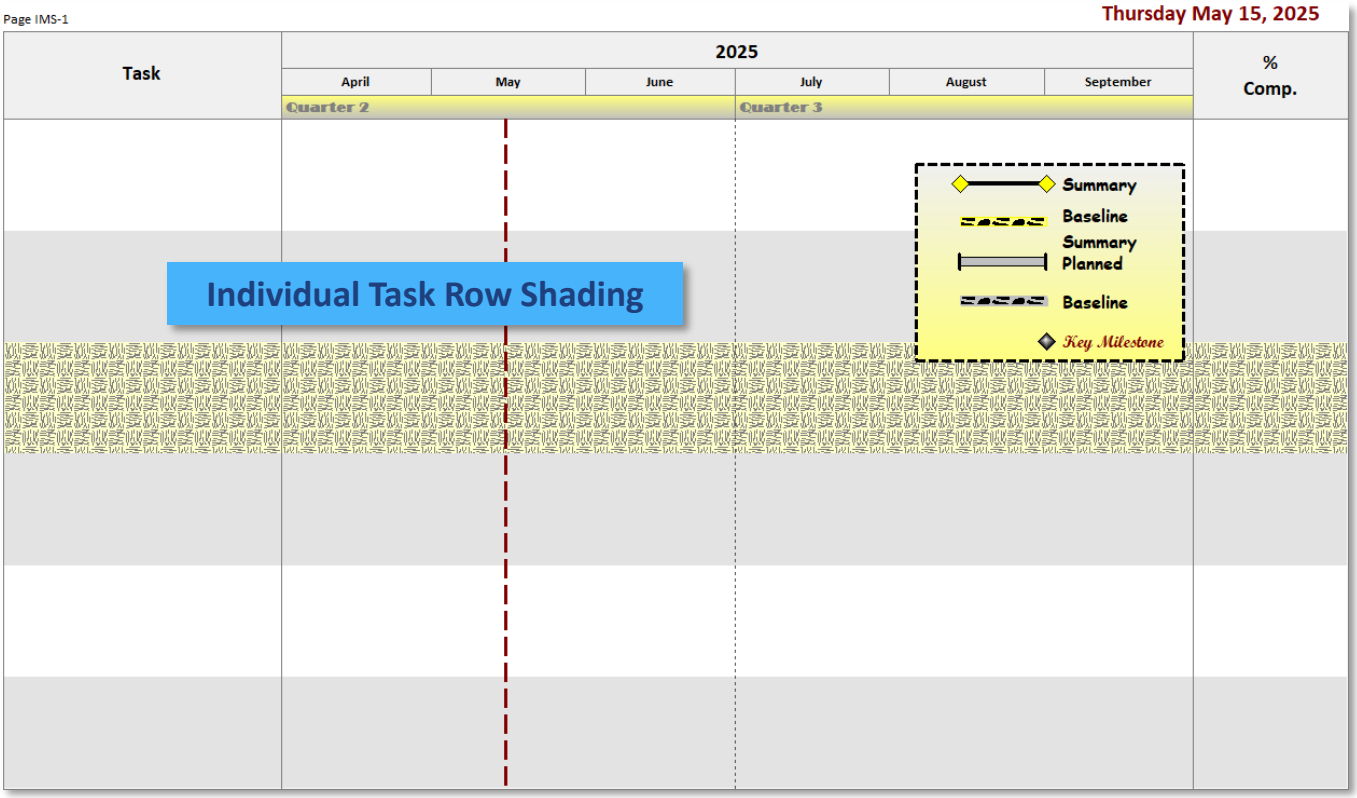
Continue to the next page to see results.



Select the **Gridlines** tab.to changes individual gridlines.

Change the horizontal gridlines and shading (continued)

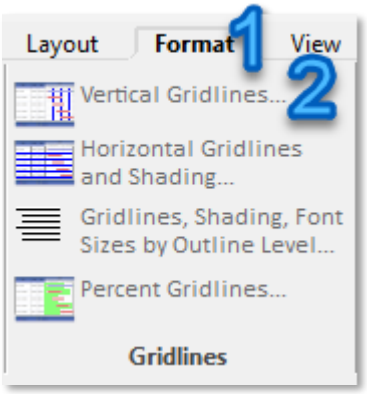
Result

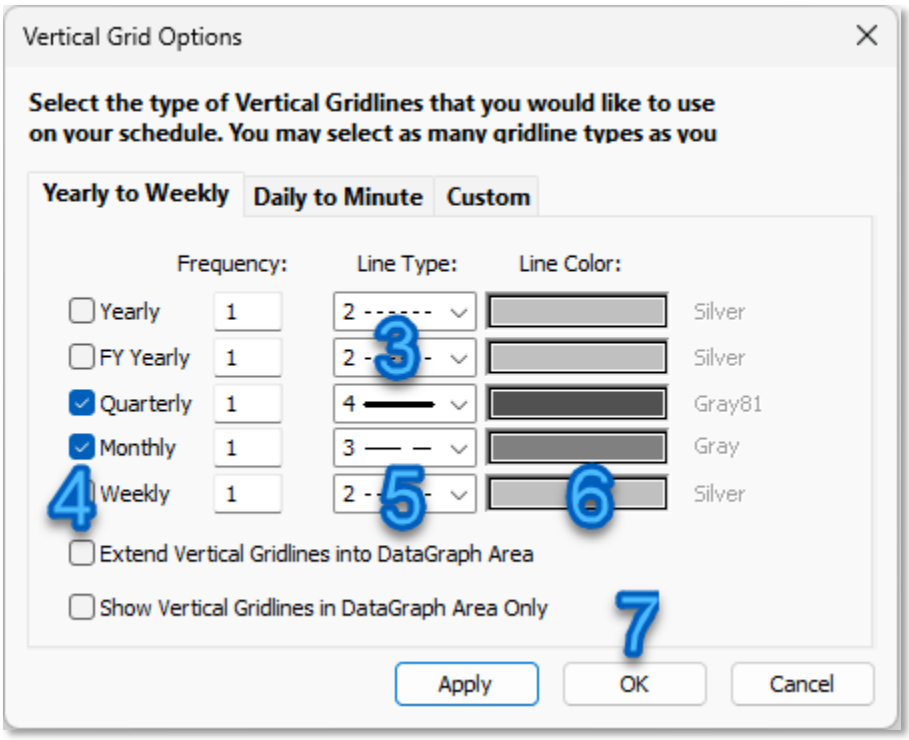


If a schedule is outlined, formatting can be set for each outline level. Choose Format. In the Gridlines section, click on Gridlines, Shading, Font Sizes by Outline Level…. Formatting options include gridlines, shading, text attributes, and summary bar symbol settings.

Change vertical gridlines

1. Choose the toolbar *Format tab*.
2. In the **Gridlines** section click *Vertical Gridlines…*. The **Vertical Grid Options** dialog box will display.





On the Yearly to Weekly tab:

3. For Quarterly Line Type select number *4.*
4. ☑ *Monthly*.
5. For Monthly Line Type pick *the third one*.
6. For Monthly Line Color pick *Gray*
7. Click *OK*.

Curtains can also be used to create vertical lines within the schedule.

