Milestones PROFESSIONAL®

TUTORIALS

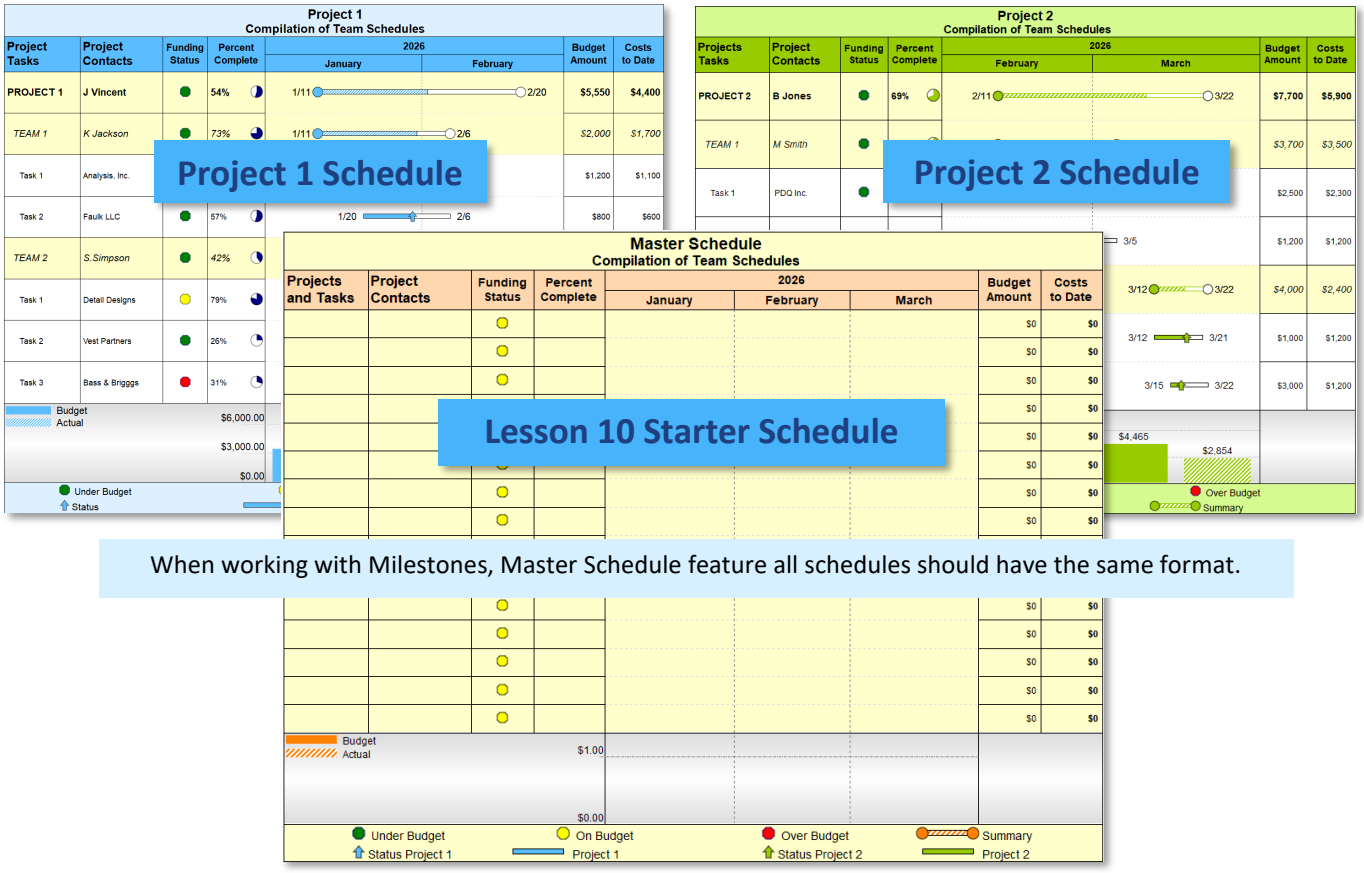
Lesson 10
Master Schedules

In this lesson you will learn how to:

- Create a master schedule from three sub-schedules.
- Make changes to a sub-schedules, then update the master schedule.

Open the schedule for this Lesson

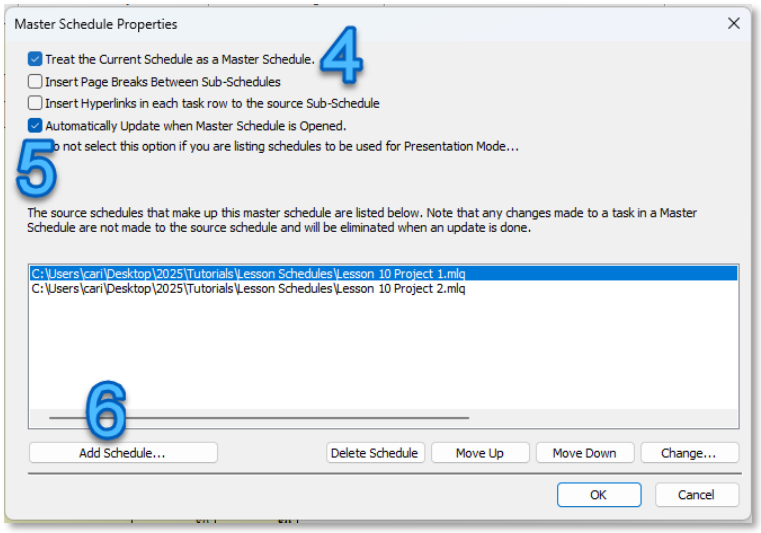
1. Choose the toolbar *File tab*.
2. In the Files and Templates: Open and Save section select *Open Samples or Lesson*. The Open a Sample Chart dialog displays.
3. Under Select a Folder below to Open select *Lessons*. Pick *Lesson 10 Starter Schedule.mlq*.
4. Save the schedule to an accessible folder 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, then save the schedule.
5. Repeat the above instructions and open *Lesson 10 Project 1.mlq* and *Lesson 10 Project 2.mlq*.
6. Leave all three schedules open.
7. To go back and forth between schedules, choose the toolbar *View tab*. In the Window Controls section, choose *Switch Windows*.



When working with Milestones, Master Schedule feature all schedules should have the same format.

Create a Master Schedule

1. Use the *View* tab to select *Lesson 10 Starter Schedule.mlq to* make it the active schedule.
2. Choose the toolbar *File tab*.
3. In the Master/Update section choose *Master Schedule…*, the Master Schedule Properties dialog box displays.
4. ☑ *Treat the Current Schedule as a Master Schedule*.
5. ☑ *Automatically Update when Master Schedule is Opened*.
6. Click the *Add Schedule* button. The Sub-Schedule dialog displays.
7. Locate where you saved *Lesson 10 Project 1.mlq* and select it.
8. Click the *Open* button. Lesson 10 Project 1.mlq path shows in the Master Schedule Properties dialog.

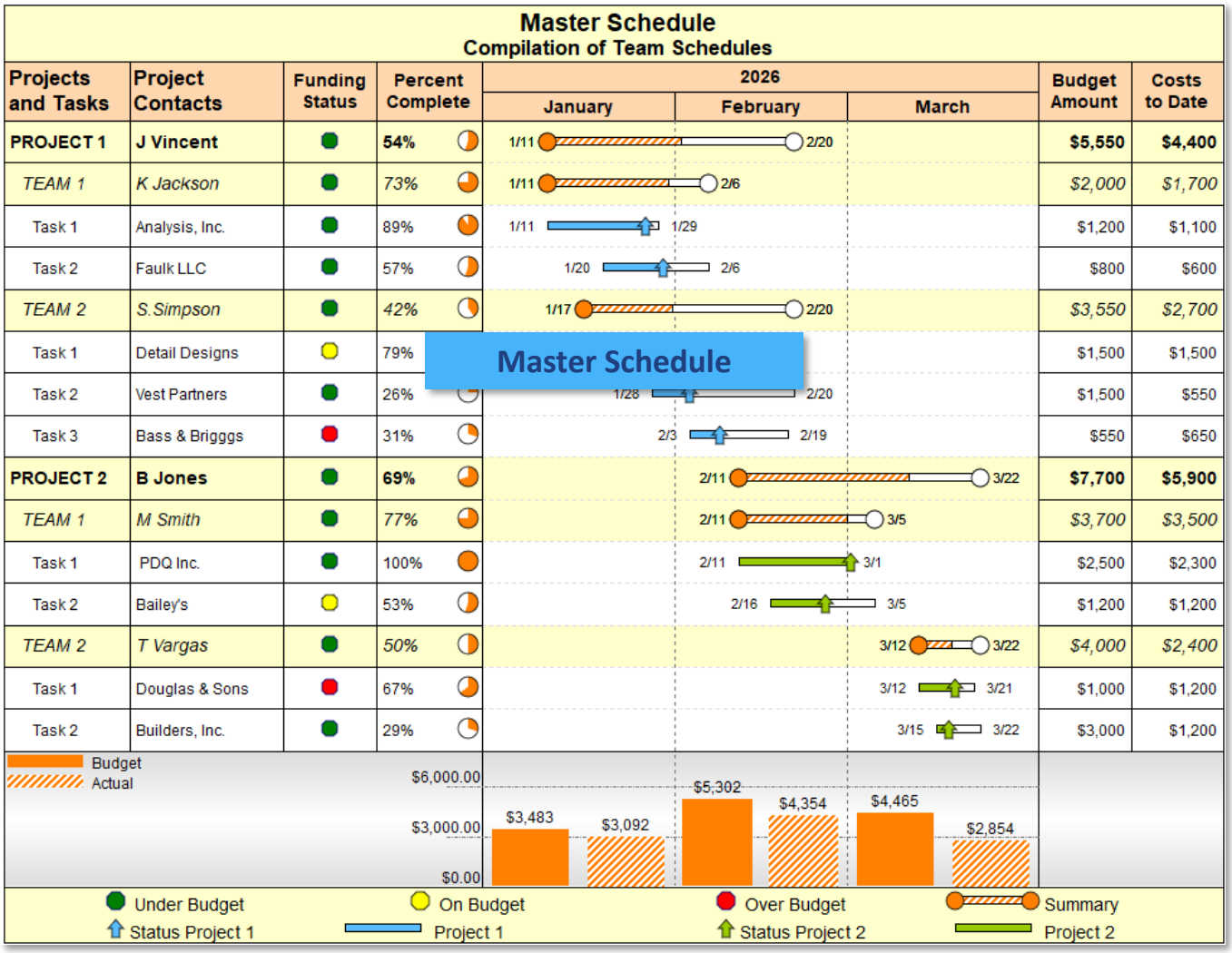


9. Click the *Add Schedule* button. The Sub-Schedule dialog will display
10. Locate where you saved *Lesson 10 Project 2.mlq* and select it.
11. Click *Open* button. Lesson 10 Project 2.mlq path shows in the Master Schedule Properties dialog.
12. Choose *OK* to return to the schedule. Nothing appears in the master schedule until you update it.
13. Choose the *File* tab.
14. In the Master/Update section choose *Update Master Schedule, Linked Symbols* and then choose *Master Schedule*.
15. The Master Schedule Update Results dialog box displays, showing which schedules were [Updated Successfully] or [Update Failed]. Choose *OK* to see the Master Schedule containing the information from Project 1 and Project 2 schedules.

Create a Master Schedule

Result

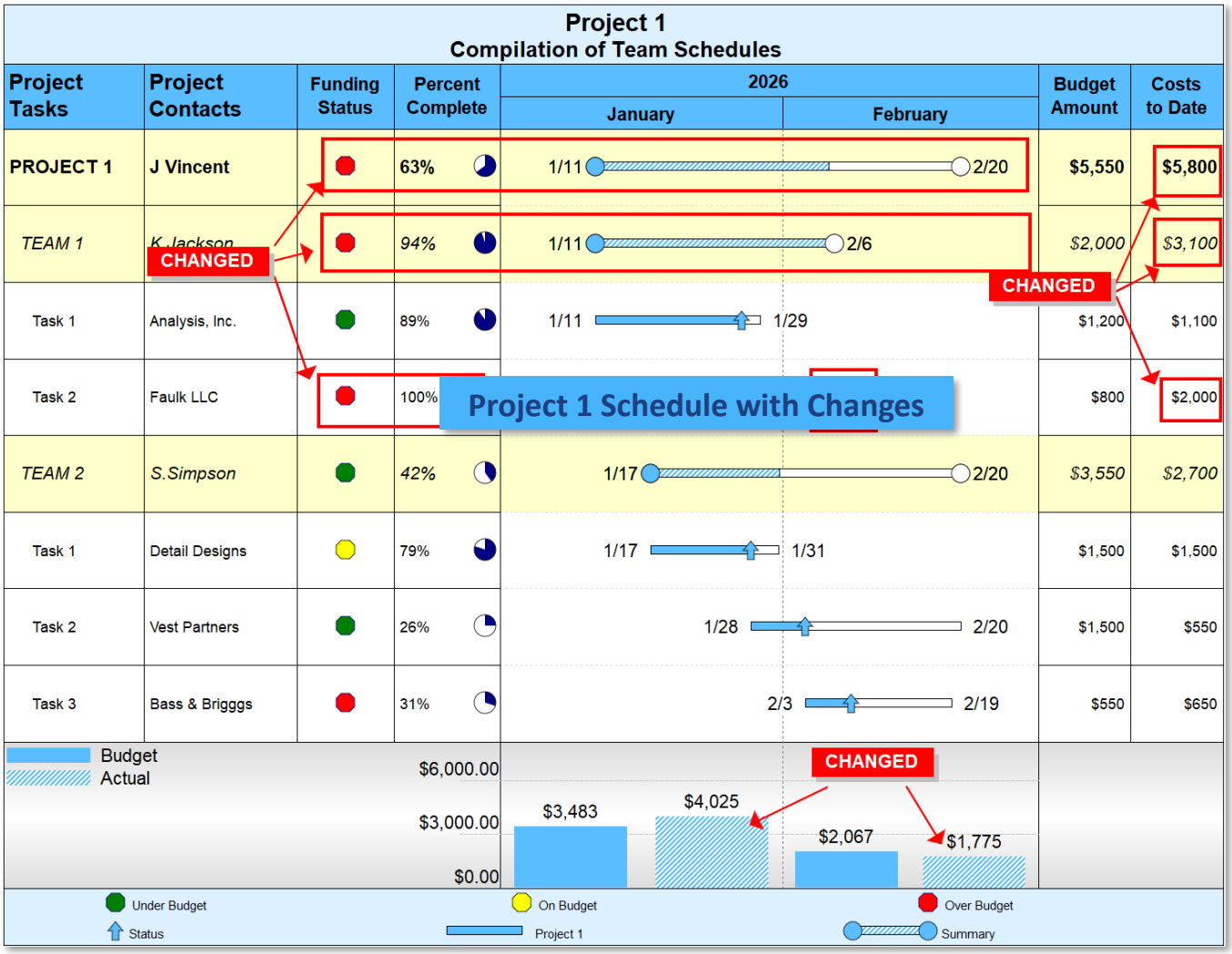
1. Save the schedule. Keep the schedule opened.



Make changes to a sub-schedule then Update the Master Schedule

Change the Project 1 sub-schedule

1. Use *View | Widow Controls | Switch Windows* to select *Lesson 10 Project 1.mlq* to make it the active schedule..
2. Click ↖ (*the toolbar Arrow tool*.)
3. Go to Team 1 - Task 2 task row, and click-and-drag the *blue arrow status symbol* to the date *2/6*. Notice the Percent Complete has changed to 100%. As well as the Summary percent's for Team 1 and PROJECT 1.
4. Click T (*the toolbar Text tool*.)
5. In the Cost to Date column, on the Team 1, Task 2 cell, click on *$600* and change it to *2000*. Click out of the schedule. Notice the Funding Status symbols and Costs to Date values have changed for the tasks Team 1-Task2, Team 1, and PROJECT 1. Also the DataGraphs for Actual have changed.
6. *Save the schedule*.



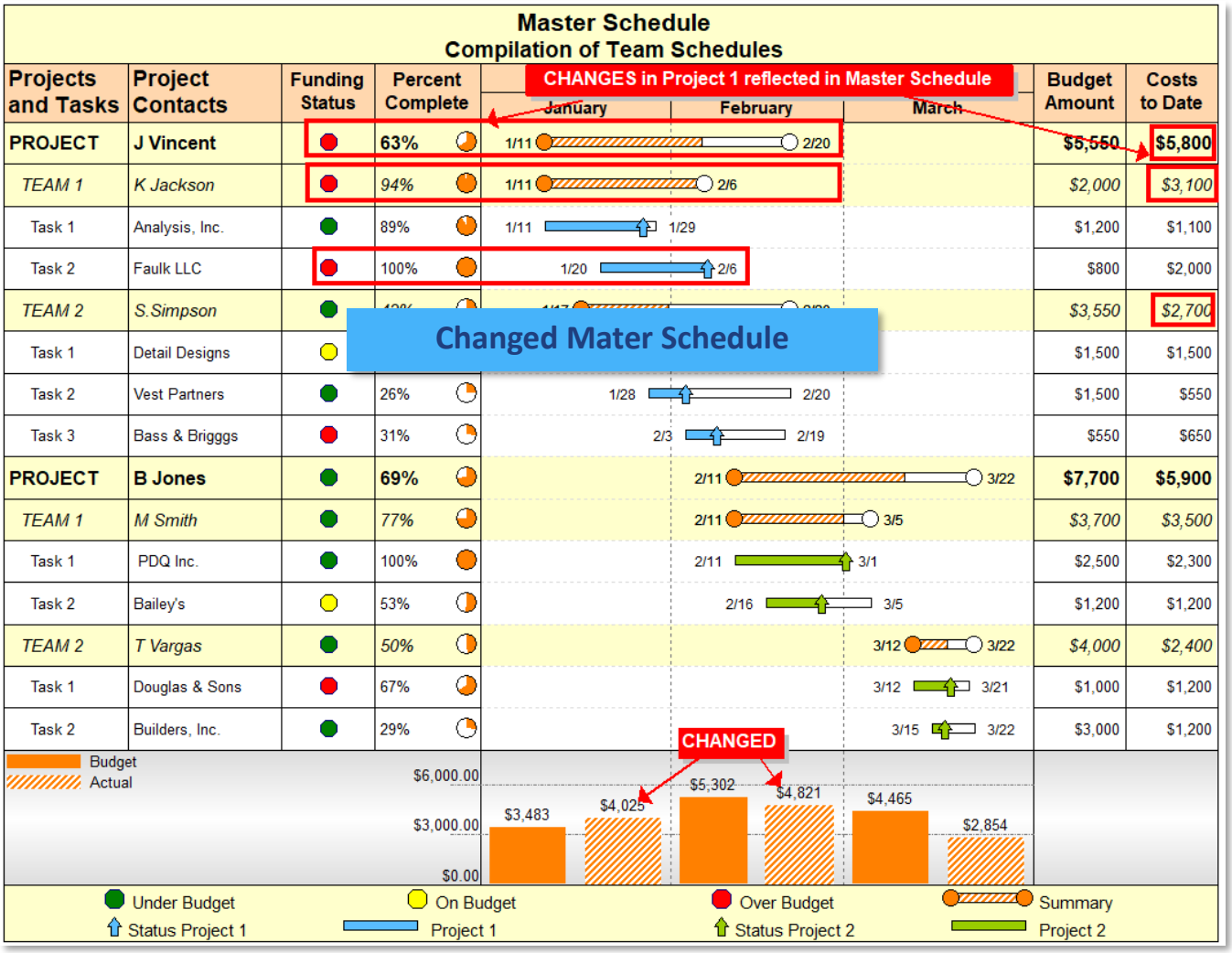
Make changes to a sub-schedule then Update the Master Schedule (continued)

Update Lesson 10 Starter Schedule which is the Master Schedule

Now that the **Lesson 10 Project 1.mlq** schedule has changed, the **Lesson 10 Starter Schedule.mlq** which is now a Master Schedule needs to be updated.

7. Use the toolbar *View tab* to select *Lesson 10 Starter Schedule .mlq* to make it the active schedule.
8. Choose the toolbar *File tab*.
9. In the Master/Updates section choose *Update Master Schedule, Linked Symbols*.
10. Choose *Master Schedule*.
11. The Master Schedule Update Results dialog box displays showing which schedules were [Updated Successfully] or [Update Failed]. Choose *OK* to see the new schedule.

Notice that the changes made in the **Lesson 10 Project 1.mlq** schedule appear in the **Lesson 10 Starter Schedule.mlq.** Funding Status symbols and Costs to Date values have changed for the tasks **Team 1-Task2**, **Team 1**, and **PROJECT 1**. Also the DataGraph results for **Actual** in the months of January and February have changed.



- You only need to set up the master schedule once.
- Changes in the master schedule do not appear in the sub-schedules.
- When the underlying schedules are changed (and saved) and the master schedule is updated, the master schedule will reflect the most recent saved changes.
- Schedules on other computers on your network can be referenced by a master schedule.
- Because master and sub-schedules need to have the same format, it's best to use a template when initially creating all sub-schedules and the master schedule.