Milestones PROFESSIONAL® TUTORIALS

Lesson 17
Work with a Baseline

In this lesson you will learn how to:

- Set up the baseline symbols, bars, and options using the Baseline Setup Wizard
- Insert a baseline
- Insert a baseline start column and a baseline end date column
- Insert a baseline duration column
- Add a baseline to a blank schedule
- Add Symbol Automation Tag columns to show baseline start and end slip dates
- Add slips

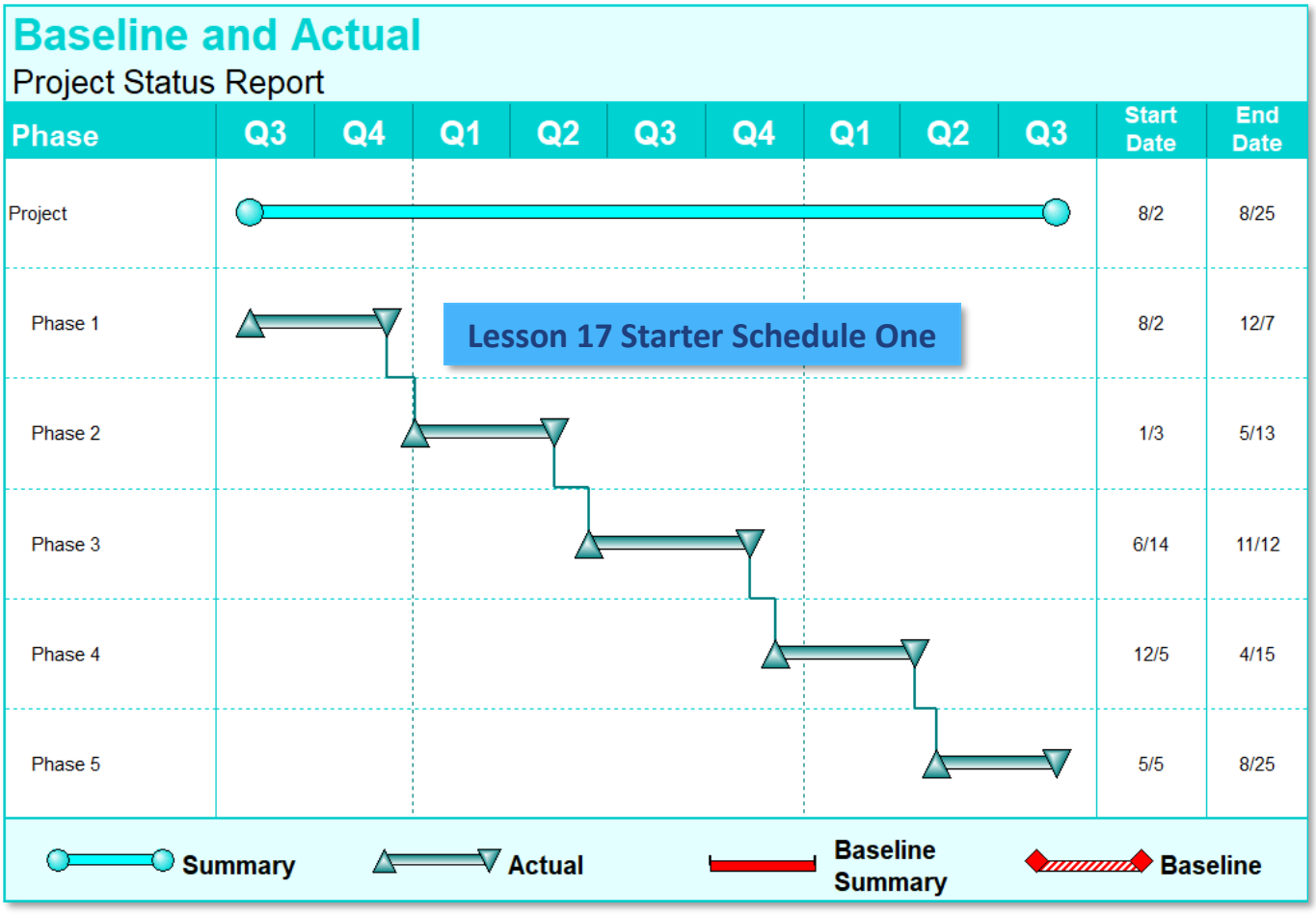
Open the schedule for the first part of this Lesson

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 and select *Lessons*. The Lesson schedules will display in the window to the right. Pick *Lesson 17 Starter Schedule One.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.

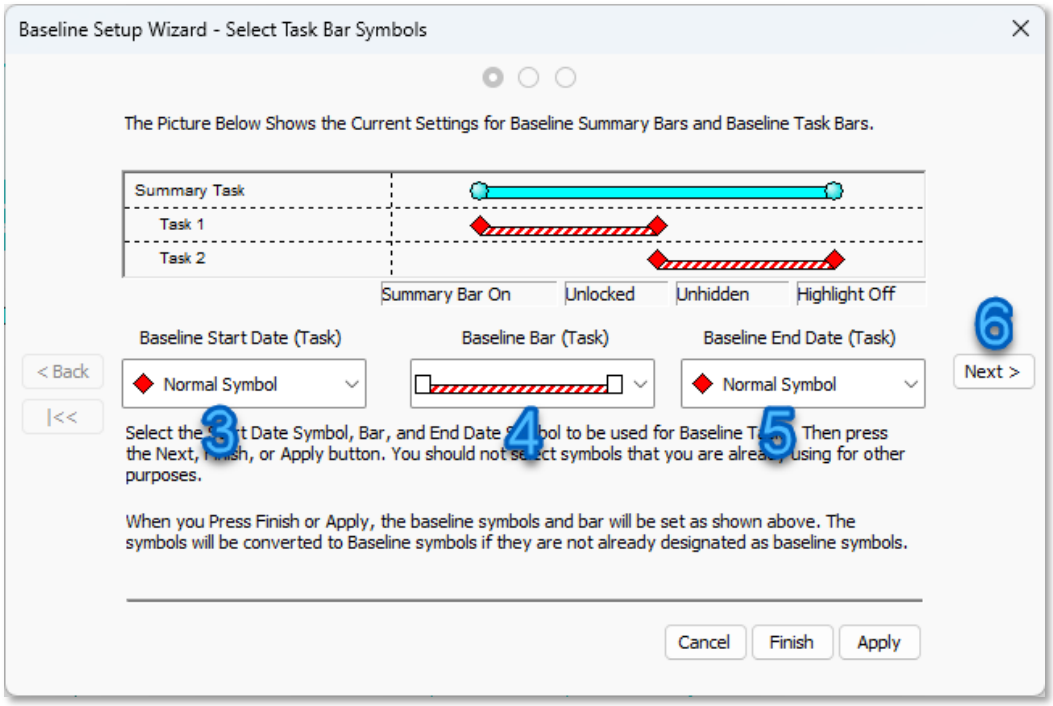


Set up the baseline symbols and horizontal bars using the Baseline Setup Wizard

The Baseline Setup Wizard guides you through setting up the symbology (symbols and bars) to be used for the task baseline display and for the summary bar baseline display.

Set-up Baseline start symbol, Baseline horizontal bar, Baseline end symbol

1. Choose the toolbar *View tab*.
2. In the Baseline section choose *Baseline Setup*. The Baseline Setup Wizard - Select Task Bar Symbols will display.



The selections for the symbols and horizontal bars are reflections of the symbols and bars in the schedule's toolbox.

3. For Baseline Start Date choose the *first red diamond* from the list.
4. For Baseline Horizontal Bar choose the *bar with red diagonal lines* from the list.
5. For Baseline End Date symbol choose the *second red diamond* from the list. This will be the symbol used to show the baseline finish dates.

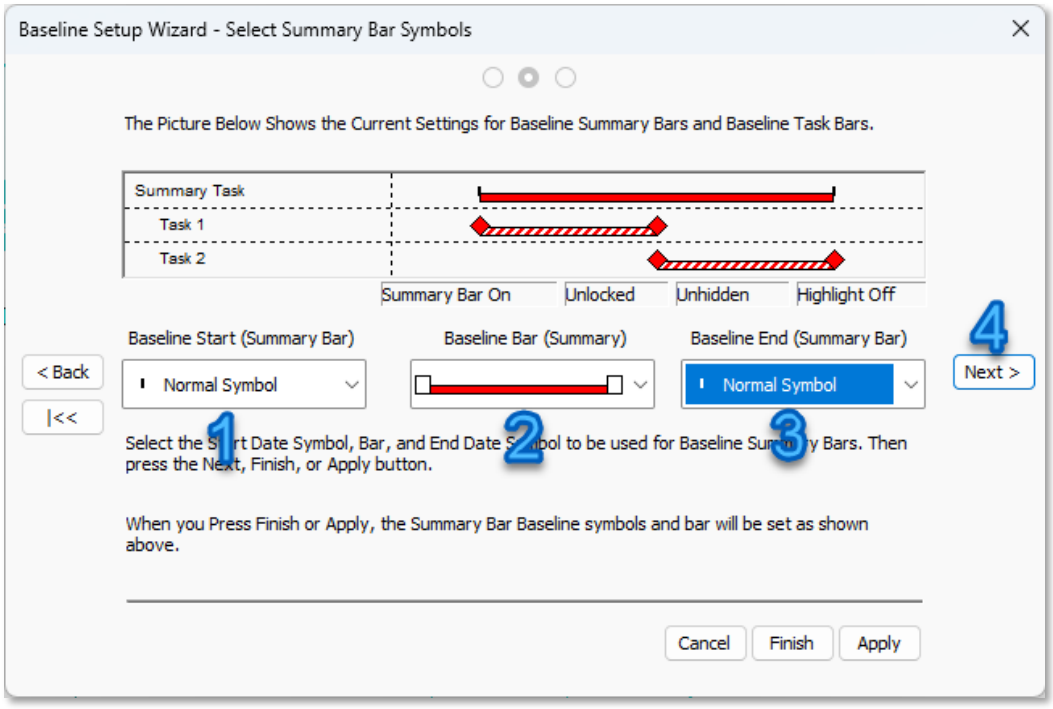
The symbols selected for **Baseline Start Date** and **Baseline End Date** will change to baseline symbols in the toolbox.

6. Select *Next*. The Baseline Setup Wizard - Select Summary Bar Symbols window will display. Leave the schedule open and go to next page of this tutorial.

Set up the baseline using the Baseline Setup Wizard (continued)

Set-up Summary Baseline start symbol, Summary Baseline horizontal bar, Summary Baseline end symbol

In the Baseline Setup Wizard - Select Summary Bar Symbols window select the following:



1. For Summary Baseline Start choose the *first black vertical line symbol* in the list.

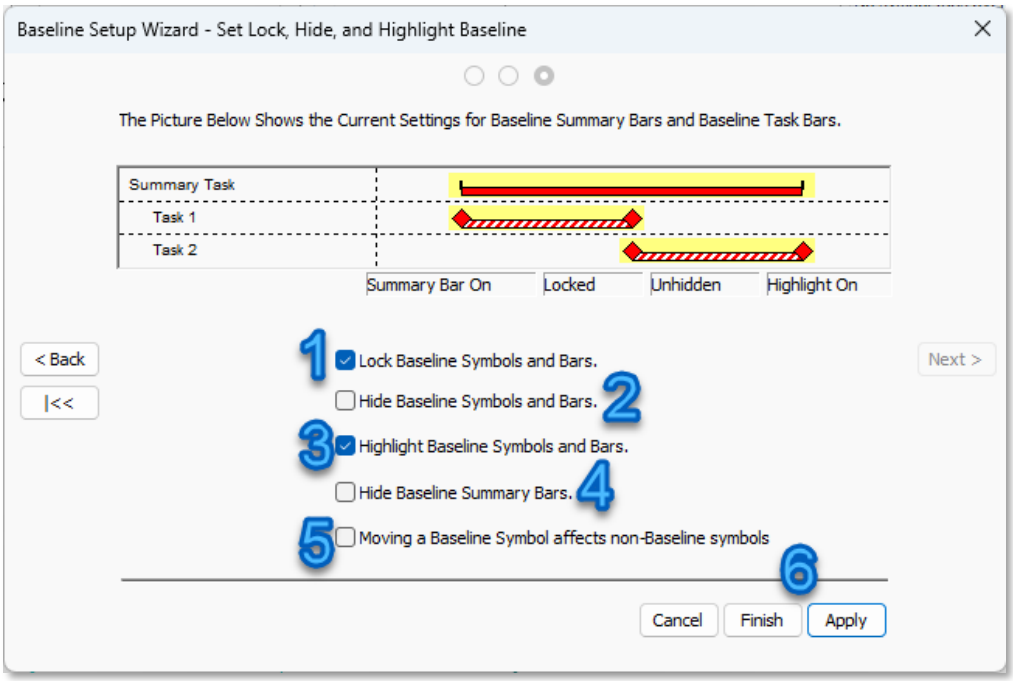
   Selected summary bar symbols will not change in the toolbox to baselines symbols, like the selected baseline start and end symbols. The Summary bar symbols will have the characteristics selected for baseline symbols. However, if the symbols are used anywhere else on the schedule they will not have the baseline characteristics . For the symbols to have baseline characteristics they must be setup as baseline symbols in the toolbox.

2. For Summary Baseline Horizontal Bar choose the *first solid red bar* in the list.
3. For Summary Baseline End choose the *second black vertical line symbol* in the list.
4. Select *Next*. The Baseline Setup Wizard - Select Summary Bar Symbols window will display. Leave open and go to next page of this tutorial.

Set up the baseline using the Baseline Setup Wizard (continued)

Choose Baseline options

In the Baseline Setup Wizard - Set Lock, Hide and Highlight Baseline window select the following:



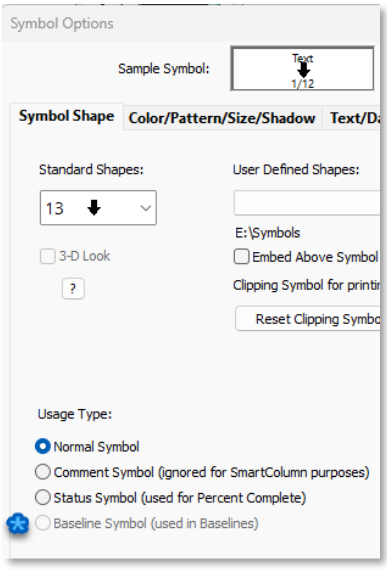
1. ☑*Lock Baseline Symbols and Bars*. This prevents movement of the baseline on the Milestones schedule
2. Uncheck *Hide Baseline Symbols and Bars*. When checked, the baseline is hidden. When unchecked, the baseline is shown.
3. ☑*Highlight Baseline Symbols and Bars*. The baseline will be highlighted in yellow.
4. Uncheck *Hide Baseline Summary bars*. When checked, the baseline summary bars are is hidden. When unchecked, the baseline is shown.
5. Uncheck *Moving a Baseline Symbol affects non-Baseline symbols*. Movement of a baseline symbol can affect all subsequent symbols on a task row or connected symbols. This is not something needed for this lesson.
6. Select *Apply* then *Finish*. You will not see any change to the schedule yet. Proceed to the next page.

More about Baseline Symbols

To Manually set and unset baseline symbols double click any symbol in the toolbox. In the Symbol Shape tab under Usage Type change the symbol to Baseline Symbol or one of the other options Normal Symbol, Comment Symbol or Status Symbol.

Multiple baseline symbols can be set up in the toolbox for use on a schedule.

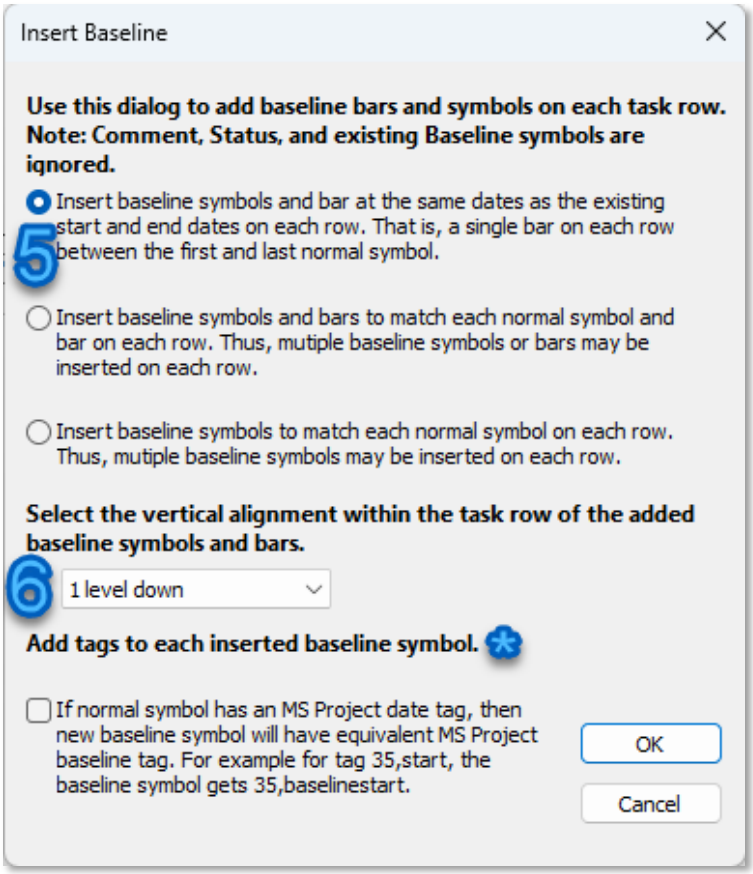
*If the Lock Baseline feature is checked on the Baseline Symbol option in the toolbox will be greyed out. To unlock baseline choose the View tab in the Baseline section uncheck *Lock Baseline*.



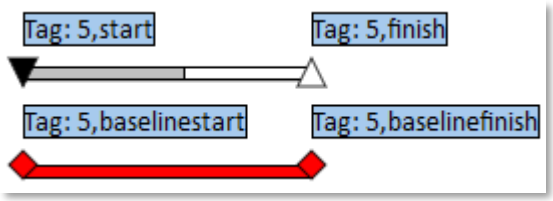
Insert Baseline

Now that Baseline has been set-up using the wizard (Part 1 of this tutorial), it can now be inserted.

1. Chose the toolbar *Insert tab*.
2. In the Baseline, Datagraph, ValueSet section choose *Insert or Remove a Baseline.*
3. Choose *Insert a Baseline*. The Insert Baseline dialog box will appear.



***Add tags to each inserted baseline symbol. Checked on**
If the schedule is imported and tagged from MS Project, Primavera or Excel the baseline symbols added will be tagged as baseline start or finish with the corresponding unique identifier of the symbol it is baselined to.



Three options are available for inserting a baseline:

- Insert baseline symbols and bars at the same dates as the existing start and end dates on each row. That is, a single bar on each row between the first and last normal symbol.



- Insert baseline symbols and bars to match each normal symbol and bar on each row. Thus, multiple baseline symbols or bars may be inserted on each row.

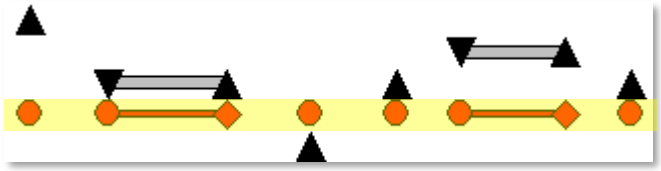


- Insert baseline symbols to match each normal symbol on each row. Thus, multiple baseline symbols may be inserted on each row. (The symbol used will be the symbol chosen in the set-up wizard for the Start Date Symbol.)

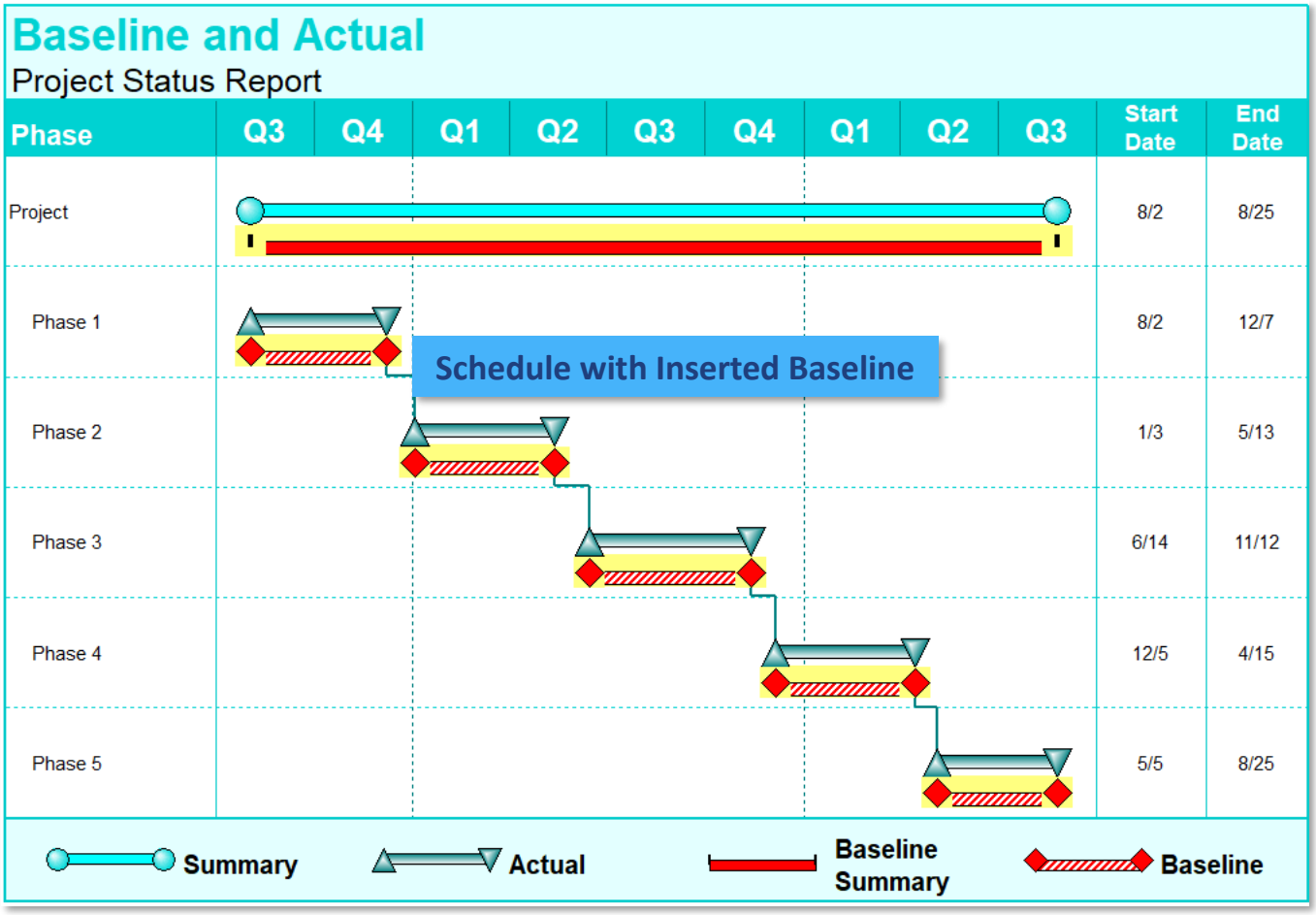


Insert Baseline (continued)

5. For this tutorial, select the first option, *Insert baseline symbols and bars at the same dates as the existing start and end dates on each row.*
6. Choose *1 level down*. There are eleven vertical levels for symbol placement within a task row. The baseline symbols will import onto the selected level.



7. Choose *OK*. The schedule now has a baseline and the baseline is highlighted.

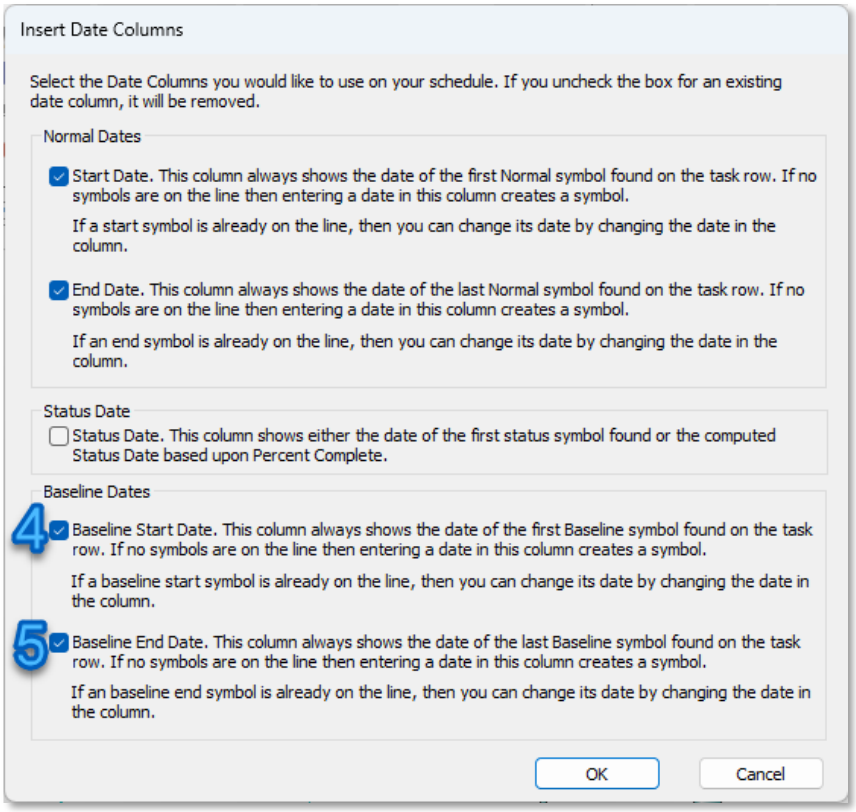


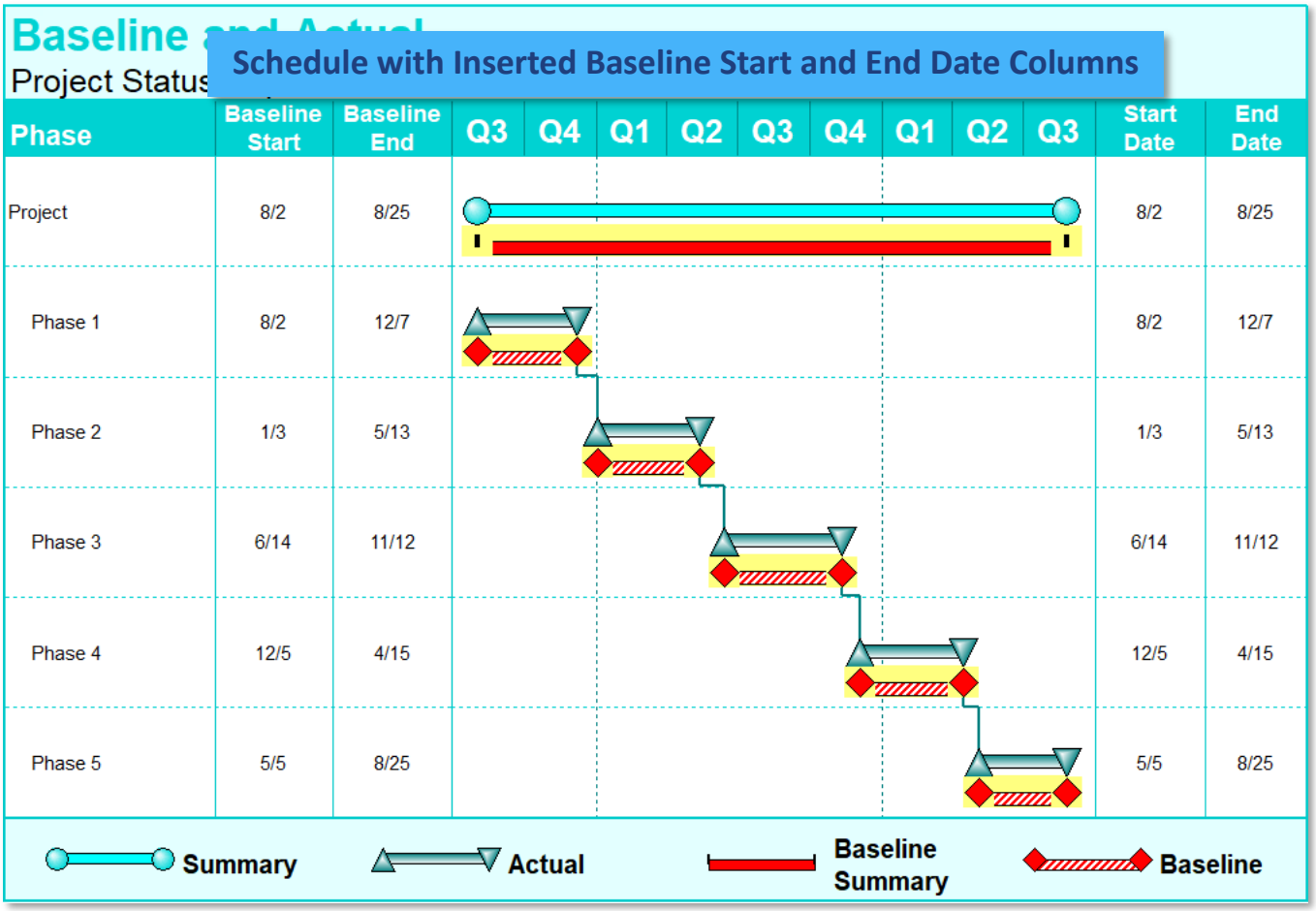
To Re-Baseline a Schedule

1. Chose the toolbar *Edit tab*.
2. In the **Delete** section choose *All Baseline symbols*. The baseline will be deleted from your schedule.
3. Reset the actual start and end date of the schedule. Then follow the direction under **Part 2: Insert baseline** to have baseline draw based on the reset actual start and end dates.

Insert a Baseline Start Date Column and a Baseline End Date column

1. Chose the toolbar *Insert tab*.
2. In the **Rows, Columns** section choose *New Column*.
3. In the drop down dialog choose *Dates*. The Insert Date Columns dialog box appears.
4. ☑ *Baseline Start Date*.
5. ☑ *Baseline End Date*.
6. Click *OK*. Schedule will have the new columns and they will be populated with the baseline start and end dates.

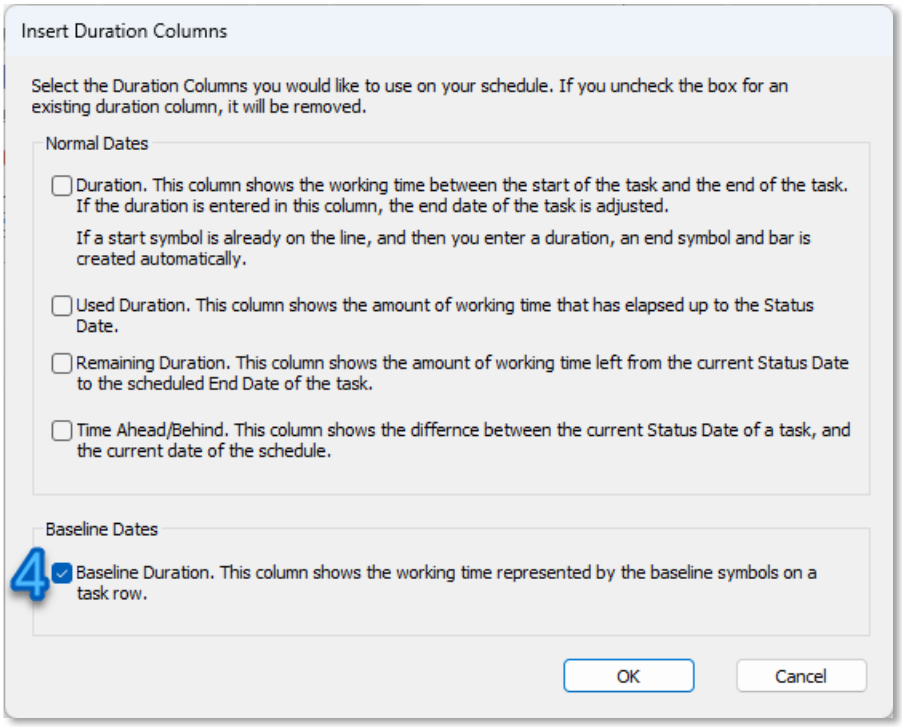


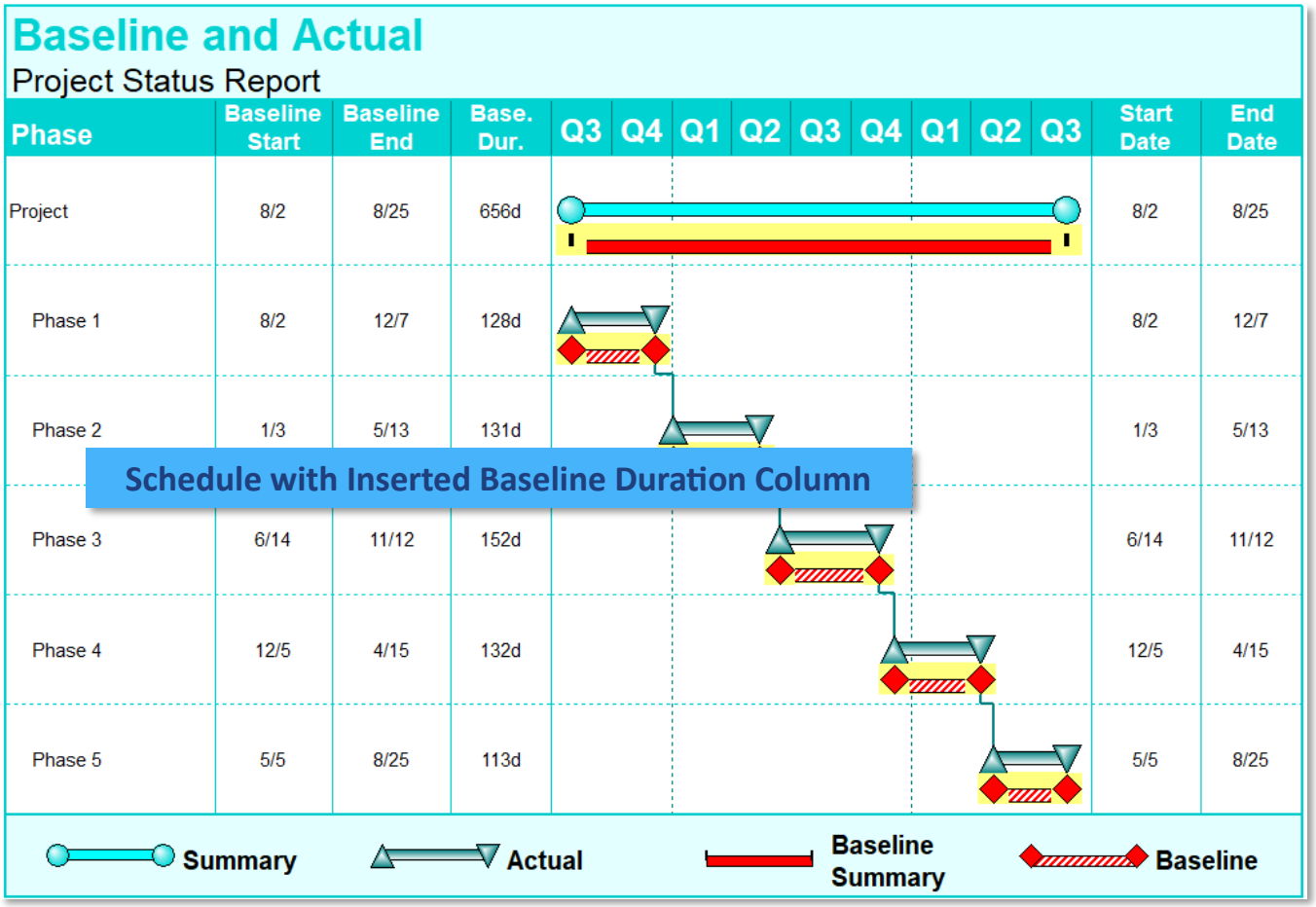


Insert a Baseline Duration column

1. Chose the toolbar *Insert tab*.
2. In the **Rows, Columns** section choose *New Column*.
3. In the drop down dialog choose *Duration*. The **Insert Duration Columns** dialog box appears.
4. ☑ *Baseline Duration*.
5. Click *OK*. The schedule now has a Baseline Duration column that is populated with duration value for each task.

To change Duration settings choose the *Layout* tab. In the Other section choose *Duration Settings*.





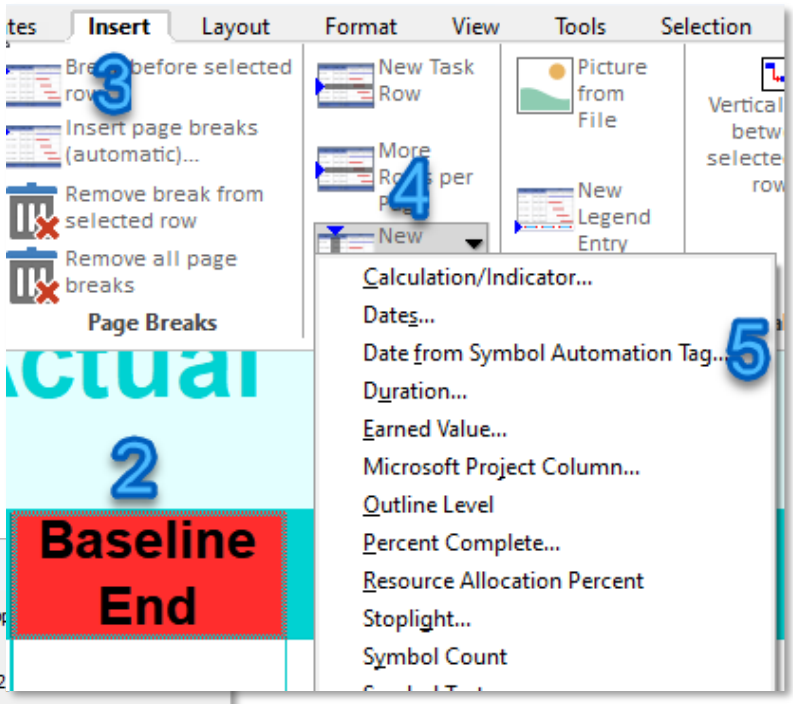
Insert Symbol Automation Tag columns to show baseline slip dates

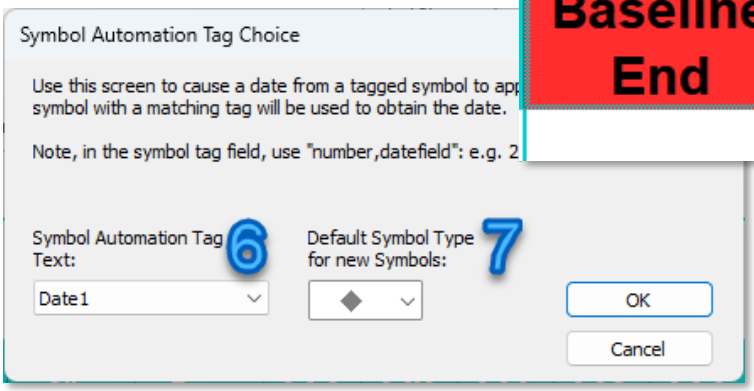
When the baseline start and end dates cannot be met a slip occurs. To show that slip date in a column you can code the column and a symbol to have its date populate a column.

Before the next section *TURN OFF: LOCK BASELINE* choose the *View* tab in the Baseline section uncheck *Lock Baseline*.

Insert a Date from Symbol Automation Tag column and code it to have the start slip date

1. Click (↖) *(the toolbox Arrow tool)*
2. Select the *Baseline End column heading*. It will highlight. This will direct the inserted column to go to the left of the Base. Dur. column.
3. Choose the toolbar *Insert tab*.
4. In the Rows, Column section, choose *New Column*.
5. From the drop down menu, pick *Date from Symbol Automation Tag*. The Symbol Automation Tag Choice dialog displays.



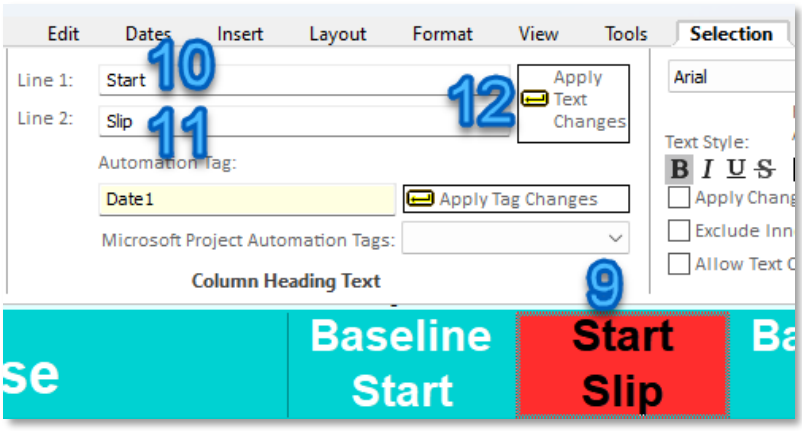


6. Under Symbol Automation Tag Text choose *Date1*.
7. Under Default Symbol Type for new Symbols choose the *gray diamond*.
8. Choose *OK* then *OK* again. A column called Date1 will be added.

The gray diamond is setup as a baseline symbol.

To increase the column's width, select the toolbox (↖) **Arrow** tool. Place the cursor on the right border , to get the ⇹ move column cursor. Click and drag the border to the right.

9. To change the Date 1 heading, select the *Date 1 column heading.* The toolbar changes to Current Object Column Heading.
10. In Line 1, back space through *Date1* then type in *Start*.
11. For Line 2 type in *Slip*.
12. Press the *Apply Text Changes* button.

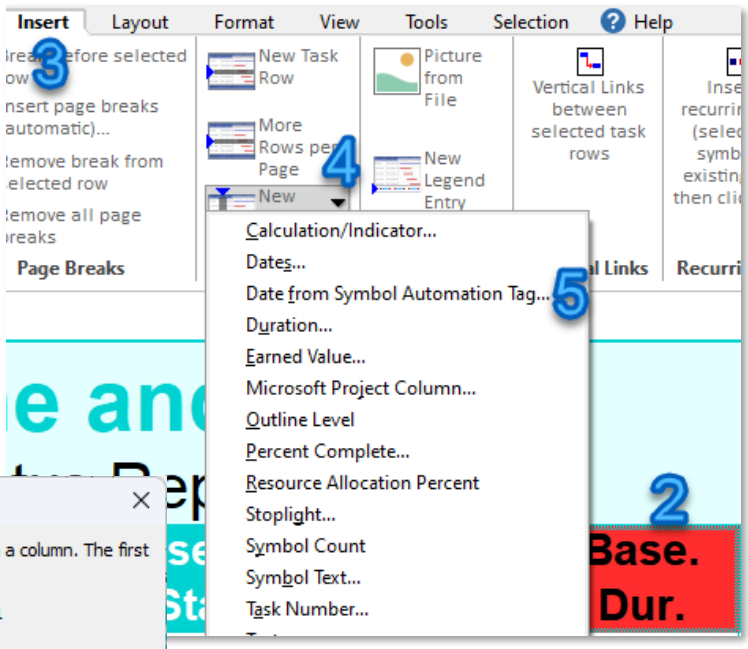


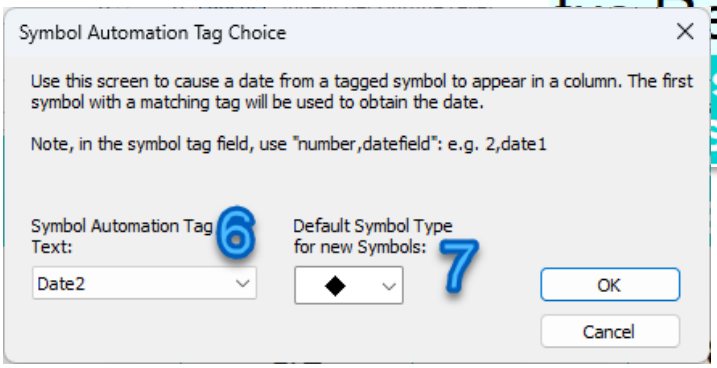
Insert Symbol Automation Tag columns to show baseline slip dates (continued)

When the baseline start and end dates cannot be met a slip occurs. To show that slip date in a column you can code the column and a symbol to have its date populate a column.

Insert a Date from Symbol Automation Tag column and code it to have the end slip date

1. Click (↖) *the toolbox Arrow tool*.
2. Select the *Base. Dur. column heading.* It will highlight. This will direct the inserted column to go to the left of the Baseline End column.
3. Choose the toolbar *Insert tab*.
4. In the Rows, Column section choose *New Column*.
5. From the drop down menu select *Date from Symbol Automation Tag*. The Symbol Automation Tag Choice dialog displays.





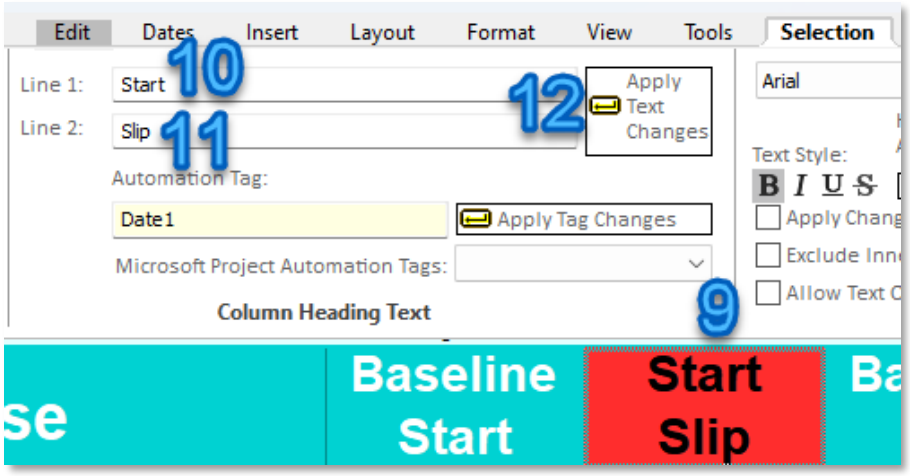
6. Under Symbol Automation Tag Text choose *Date2*.
7. Under Default Symbol Type for new Symbols choose the *black diamond*.

The black diamond is setup as a baseline symbol.

8. Choose *OK* then *OK* again.

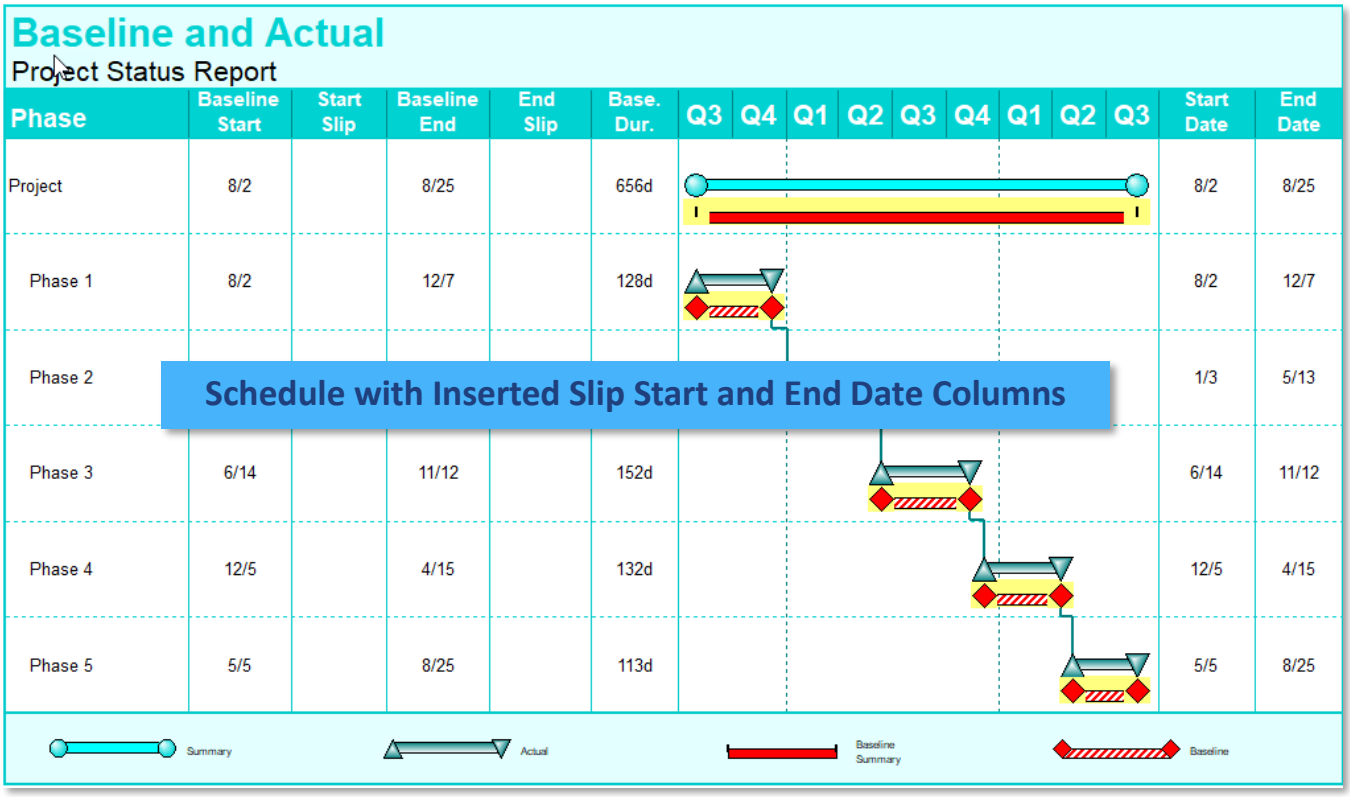
To increase the column's width, select the toolbox (↖) **Arrow** tool. Place the cursor on the right border , to get the ⇹ move column cursor. Click and drag the border to the right.

9. To change the Date 2 heading, select the *Date 2 column heading.* The toolbar changes to Current Object Column Heading.
10. In Line 1, *back space through Date2* and then type in *End*.
11. For Line 2 type in *Slip*.
12. Press the *Apply Text Changes button.*



Insert Symbol Automation Tag columns to show baseline slip dates (continued)

Result:

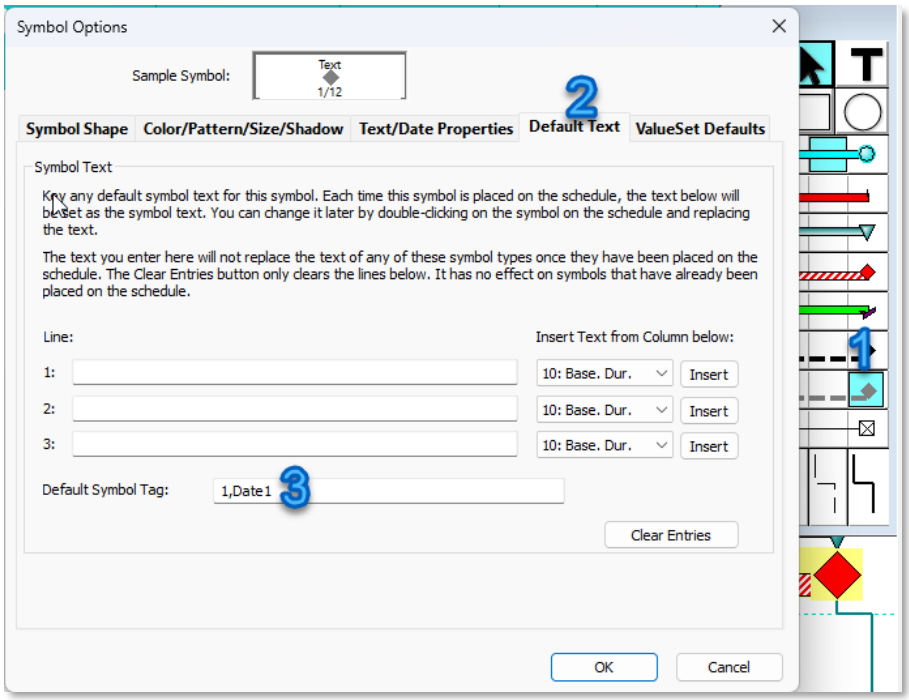


Code the slip symbols in the toolbox to populate Slip columns

Code the start slip symbol in the toolbox to populate Start Slip column

By coding the start slip symbol in the toolbox each time the symbol is added to the schedule its date will populate in the Start Slip column.

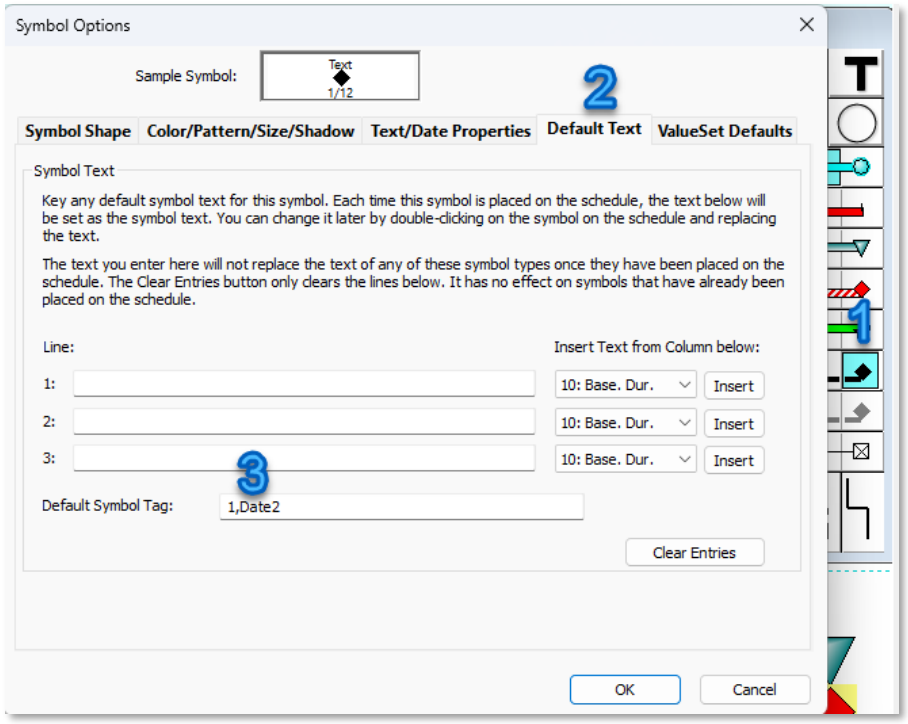
1. **In the toolbox, Double click the *gray diamond.* The Symbol Options dialog displays.**
2. **Select the *Default Text* tab.**
3. **For the Default Symbol Tag type in *1,Date1*.**
4. **Choose *OK*. Nothing will change on the schedule until you add the start slip symbol to the schedule later in the tutorial.**



Code the end slip symbol in the toolbox to populate End Slip column

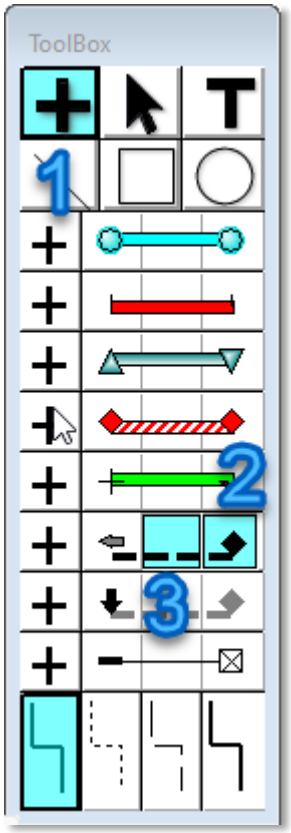
By coding the end slip symbol in the toolbox each time the symbol is added to the schedule its date will populate in the End Slip column.

1. In the toolbox, Double click *the black diamond.* The Symbol Options dialog displays.
2. Select the *Default Text* tab.
3. For the Default Symbol Tag type in *1,Date2*.
4. Choose *OK*. Nothing will change on the schedule until you add the end slip symbol to the schedule later in the tutorial.

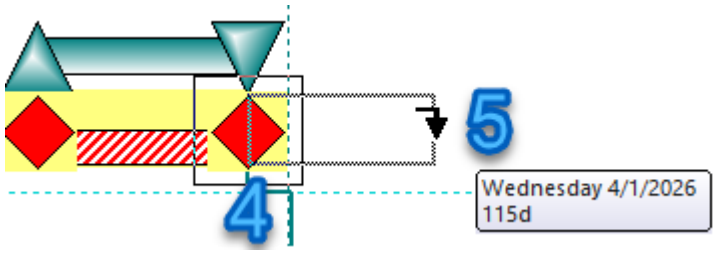


Add slips

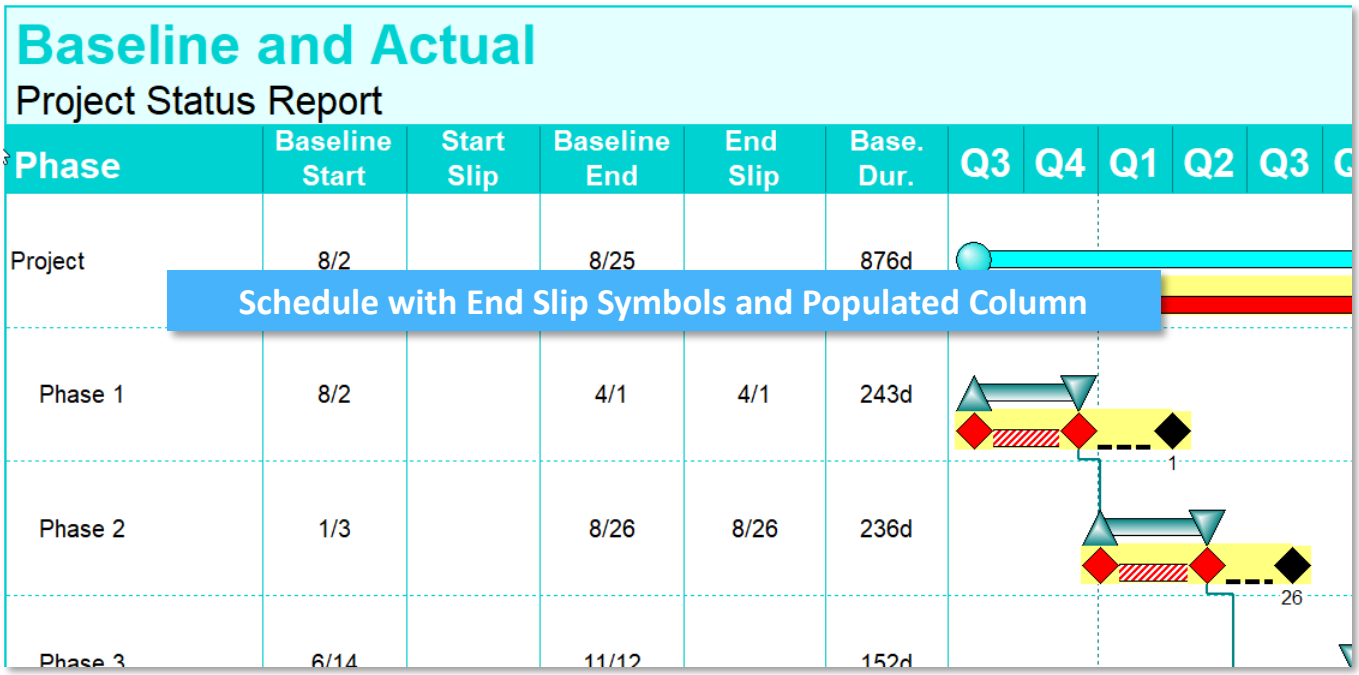
Add end slip symbols



1. Click + (*the toolbox Plus tool)*.
2. In the toolbox, click the *black diamond*. It will highlight.
3. In the toolbox, click the *black dotted horizontal bar* (next to the black diamond). It will highlight.

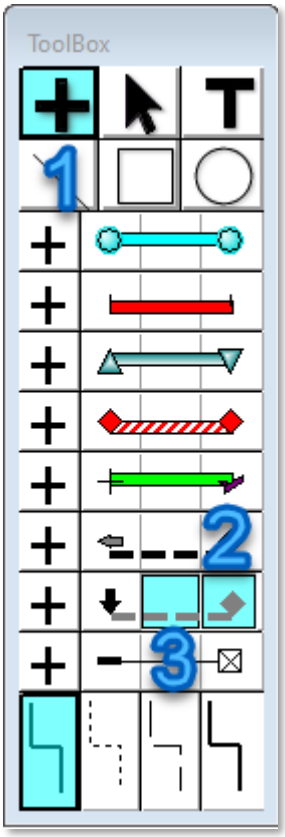


4. Move the cursor to the schedule area and click on the *red diamond end symbol of Phase 1*.
5. Continue to hold the mouse button and drag horizontally to the right. Let go of the mouse button on *4/1/2026*. The slip is added and the end slip column for the task Phase 1 is populated with the slip date.
6. Move the cursor to the schedule area and click on the *red diamond end symbol of Phase 2*.
7. Continue to hold the mouse button and drag horizontally to the right. Let go of the mouse button on *8/26/2026*. The slip is added and the end slip column for the task Phase 2 is populated with the slip date.



Add slips

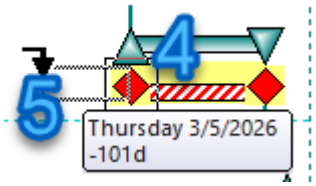
Add a start slip symbol



1.Click + (*the toolbox Plus tool*.)

2.In the toolbox, click the *gray diamond*. It will highlight.

3.In the toolbox, click the *gray dotted horizontal bar* (next to the black diamond). It will highlight.



4. Move the cursor to the schedule area and click on the *red diamond start symbol of Phase 3*.

5. Continue to hold the mouse button and drag horizontally to the left. Let go of the mouse button on *3/5/2026*. The slip is added and the start slip column for the task Phase 3 is populated with the slip date.

