Milestones PROFESSIONAL® TUTORIALS

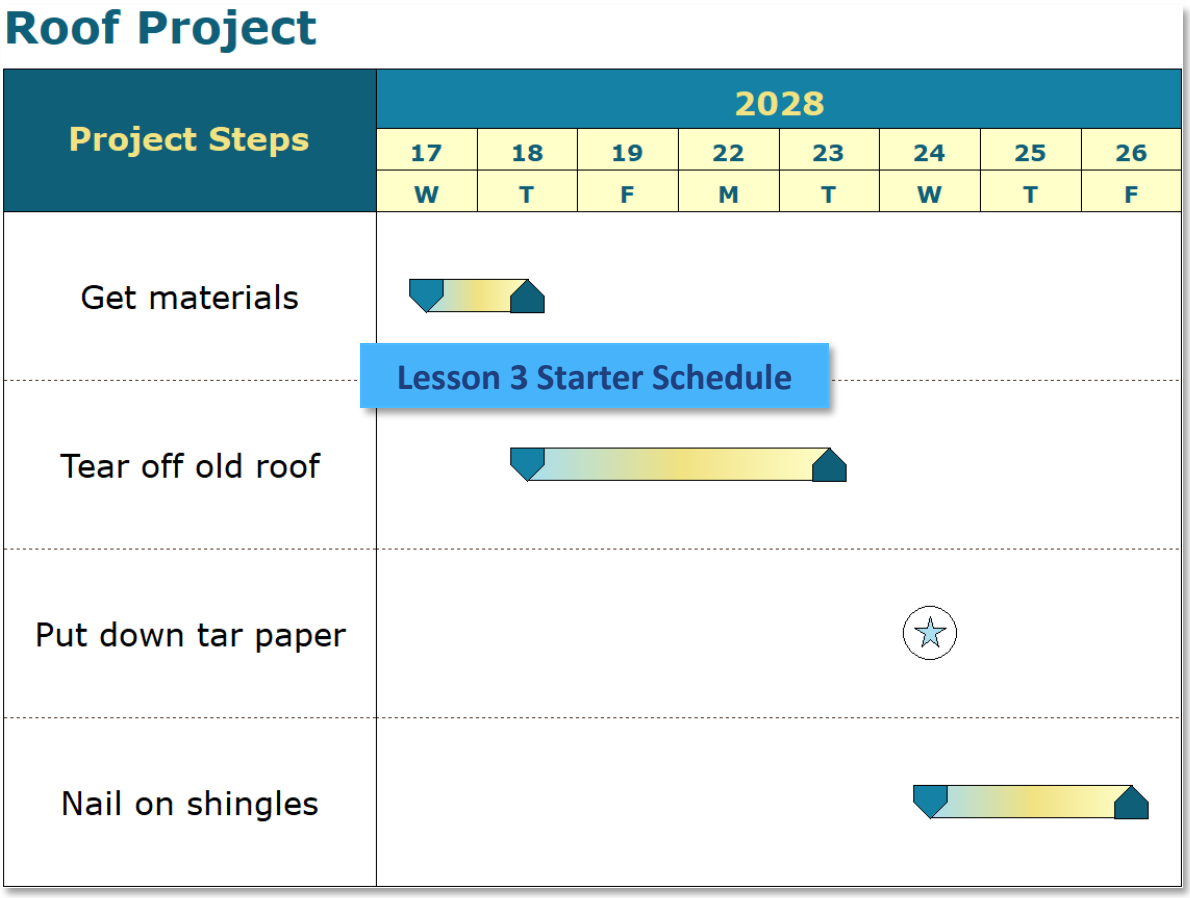
Lesson 3
Work with Text

In this lesson you will learn how to:

- Add and customize freeform text
- Display symbol dates
- Add text to a symbol
- Add symbol text to the middle of a bar
- Add angled symbol text
- Add a symbol note with picture

Open the schedule for this Lesson

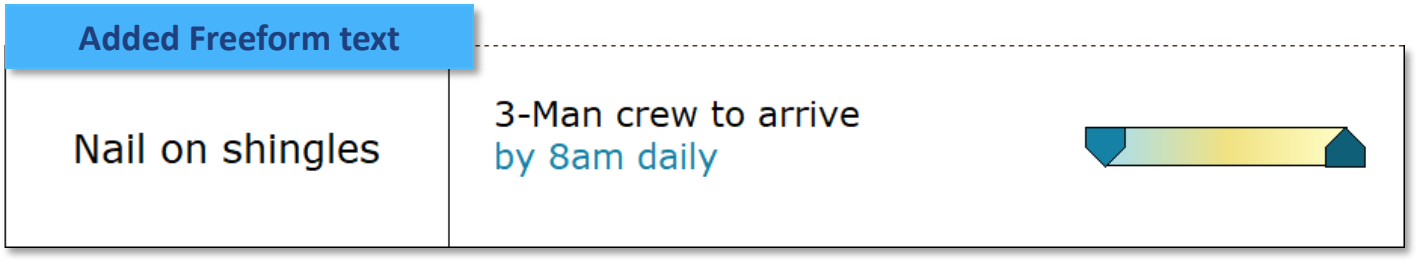
1. Choose the toolbar *File tab*.
2. In the *Files and Templates: Open and Save* section select *Open Samples or Lesson*. The *Open a Sample Chart* dialog displays.
3. Under *Select a Folder below to Open*, select *Lessons*. Pick *Lesson 03 Starter Schedule.mlq*.
4. Save the schedule to an accessible 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.



Add Freeform text

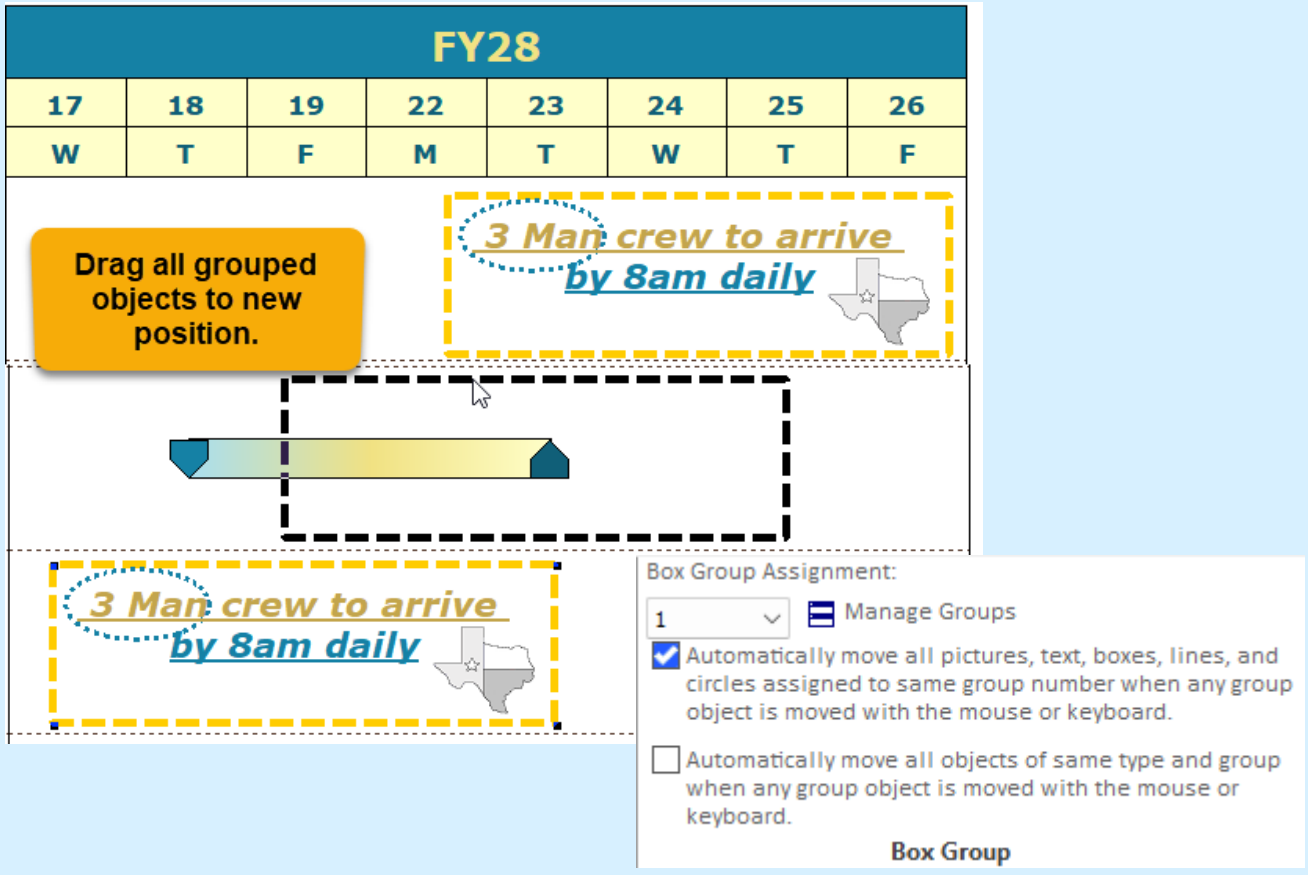
1. Click T (*the toolbox Text tool*).
2. Click in the schedule area, to the right of the Nail on shingles step. The flashing cursor displays.
3. Type *3-Man crew to arrive*.
4. Press *Enter* to split the text onto a new line.
5. Type *by 8am daily.*
6. Next to by 8am daily, type in the following code color code *<rgb:21,129,165>* then click away from the text. This code will change this line of text to the color teal. 3-Man crew to arrive text will not be affected.

To change the default Freeform text style, color, size **Format | Default Text | *Freeform Text***.



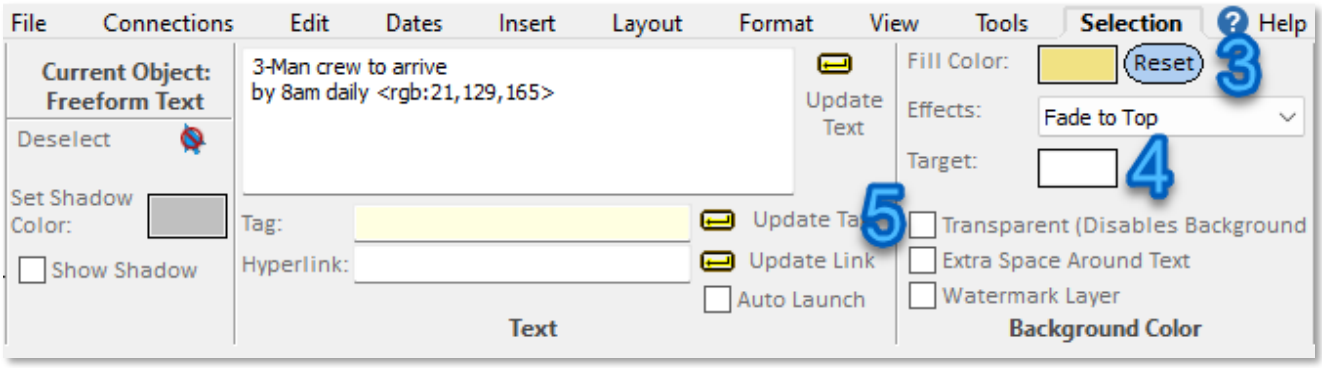
Freeform text will not move with a task row -- it is placed relative to the page.

Freeform text can be grouped and moved with other objects including lines, boxes, circles and pictures. See *Lesson 20*.

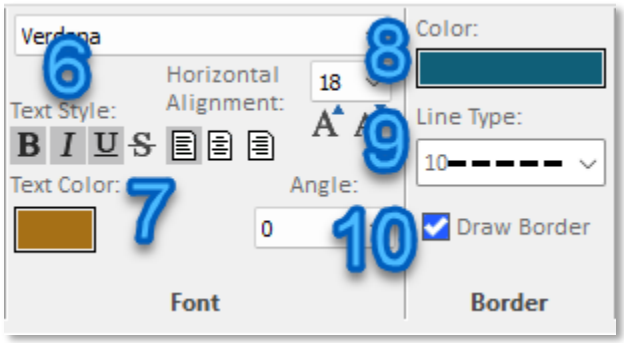


Customize the freeform text

1. Click ↖ (*The toolbox arrow tool.*)
2. Click the freeform text *3-Man crew to arrive by 8am daily.* The toolbar changes to the Selection tab for freeform text and shows the properties for this freeform text block. Follow the numbers to change the properties.



3. For *Fill Color* choose *Light Gold*.
4. For *Effects* choose *Fade to Top*.
5. Uncheck *Transparent (Disables Background Color)*. This has to be unchecked to change the freeform text's background color. When checked, the text box is not filled.
6. For *Text Style* choose the (*B*) *Bold*, (*I*) *Italic* and *(U) Underline* icons.
7. For *Text Color* choose *Medium Brown*. The first line of freeform text (3-Man crew to arrive) color will change. The color coded second line of freeform text (by 8am daily) will not be affected.
10. For *Color* choose *Dark Teal*.
11. For *Line Type* choose *10*.
12. ☑ *Draw Border*. This will cause the border to draw.

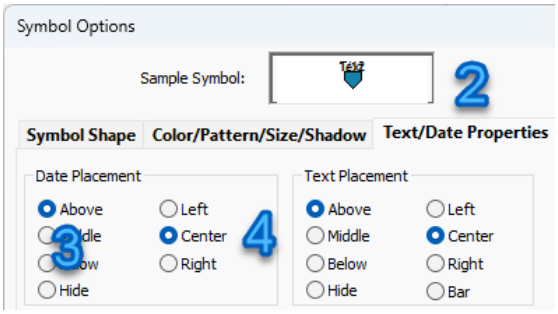




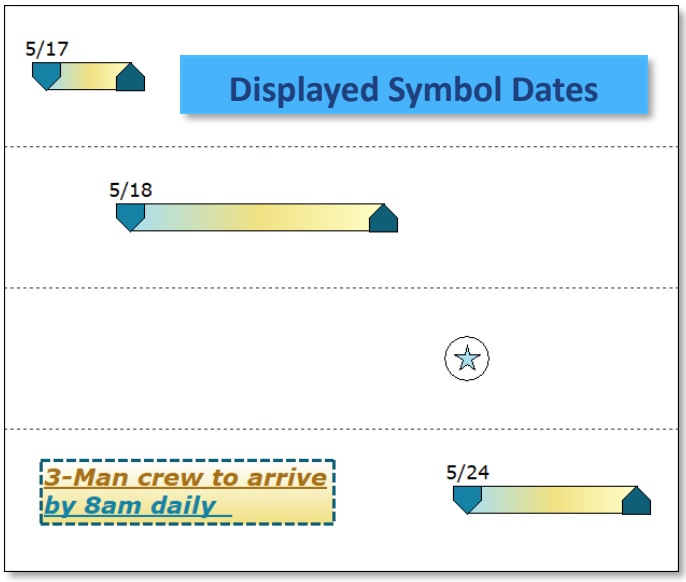
Display symbol's date

Globally

1. In the ToolBox, *double-click the* *symbol*. It is used for the start symbols on the schedule. The Symbol Options dialog box displays.



2. Click the *Text/Date Properties* tab.
3. Under *Date Placement*, choose *Above* and *Center*.



Adjust symbol date position with the keyboard by clicking on a symbol - Then, hold down *ALT + CTRL. keys* and use the keyboard *arrow keys* to move the symbol date around the symbol.

4. Click O*K*. Each symbol now displays its date.

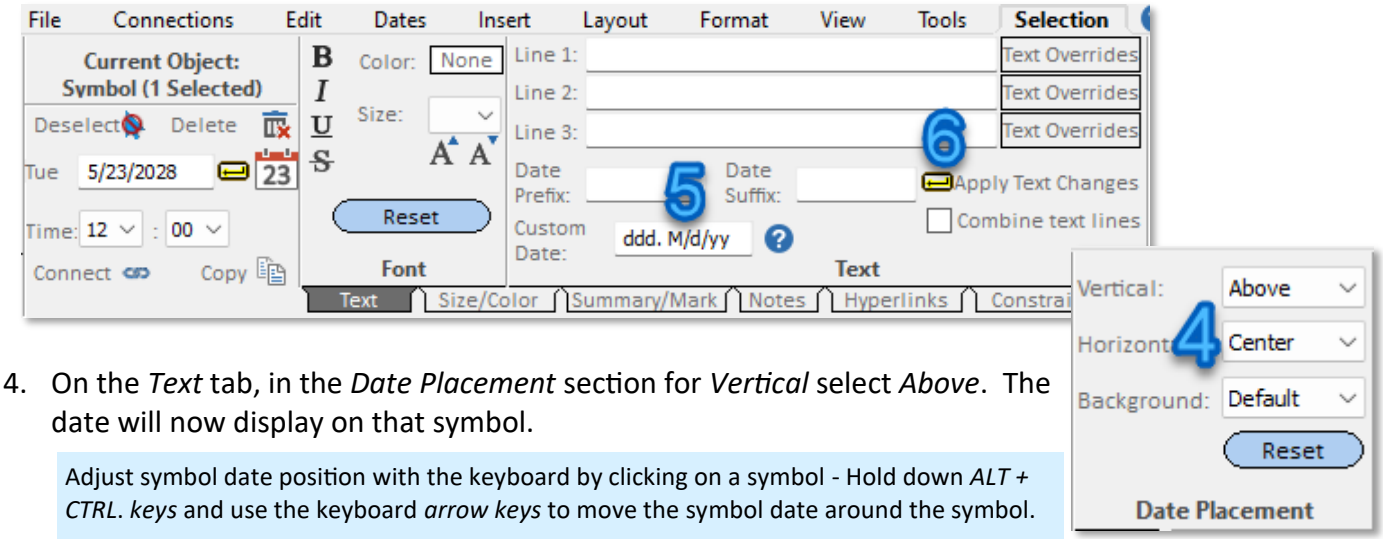
To globally change the symbol date format, choose *Dates | Date Related Settings | Set Symbol Date Format*.
Select the question mark icon to view all available codes for the custom date format.

To globally change a specific toolbox symbol's date format, double-click the symbol in the ToolBox. Go the Text/Date Properties tab. Under *Symbol Date Format Override* enter the symbol date format for *Symbol Date Format Override*.
Select the question mark icon to view all available codes for the custom date format.

Display symbol's date (continued)

Individually

1. Click ↖ (*the toolbox arrow tool.*)
2. On the schedule, in the task row for Tear off old roof click the *end symbol*.
3. The toolbar changes to Selection tab for the selected symbol.



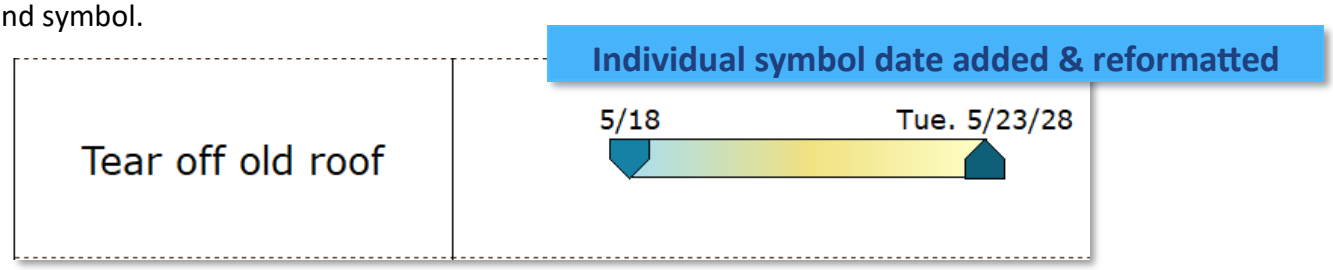
4. On the *Text* tab, in the *Date Placement* section for *Vertical* select *Above*. The date will now display on that symbol.

> Adjust symbol date position with the keyboard by clicking on a symbol - Hold down *ALT + CTRL. keys* and use the keyboard *arrow keys* to move the symbol date around the symbol.

5. To change just this symbol's date format, In the Text section for Custom Date, type in the following code: *ddd. M/d/yy*.

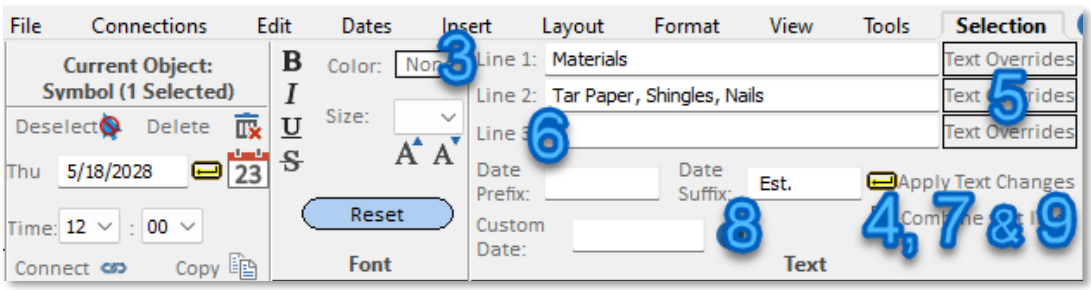
> Select the ? question mark icon to view all available codes for the custom date format.

6. Press the *Apply Text Changes button*. The custom formatted date Tue. 5/23/28 will display above the end symbol.



Add text to a symbol

1. Click ↖ (*the toolbox arrow tool*.)
2. Click the *end symbol* for the *Get materials* step. The toolbar changes to the Selection tab and shows all the properties for the end symbol.

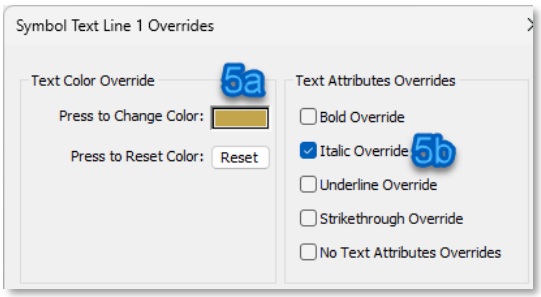


Use Symbol Text when text needs to "stick" to a task or symbol when the schedule updates.

Symbol date is considered symbol text thus it will have the same look.

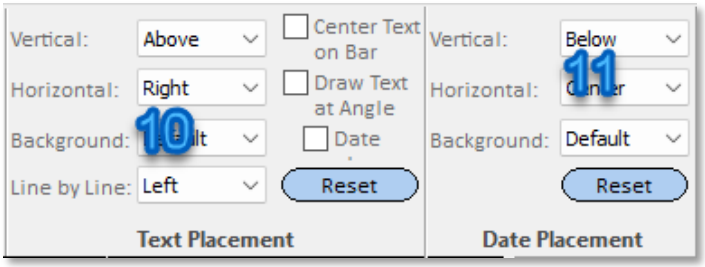
3. In the Text section for Line 1 type in *Materials*.
4. Press the *Apply Text Changes* button.
5. In the *Text* section, click *Text Overrides* for Line 1. The Symbol Text Line 1 Overrides dialog box displays.
   a. Under *Text Color Override* click the *Press to Change Color* rectangle to open the color palette. Choose *light brown*.
   b. Under Text Attributes Overrides ☑*Italic Override.*
   c. Click *OK*.
6. In the *Text* section for Line 2 type in *Tar Paper, Shingles, Nails*.
7. Press the *Apply Text Changes* button.
8. In the Text section, for Date Suffix, type a *space* then *Est.*
9. Press the *Apply Text Changes* button.
10. In the *Text Placement* section, for *Horizontal* choose *Right*.
11. In the *Date Placement* section, for *Vertical* choose *Below*.

To change the default symbol text style, color, size and attributes choose **Format | Default Text | *Symbol Text***.

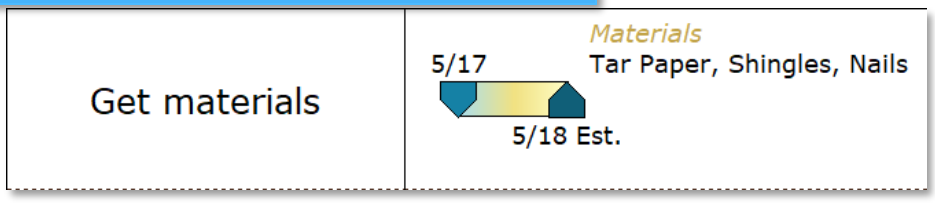


Symbol text overrides to customize a line of text.

Adjust symbol text position with the keyboard by clicking on a symbol - Hold down *ALT key* and use the keyboard *arrow keys* to move the symbol text around the symbol.



Added & Customized Symbol Text



To change the default symbol text style, color, size and attributes choose *Format | Default Text | Symbol Text*.

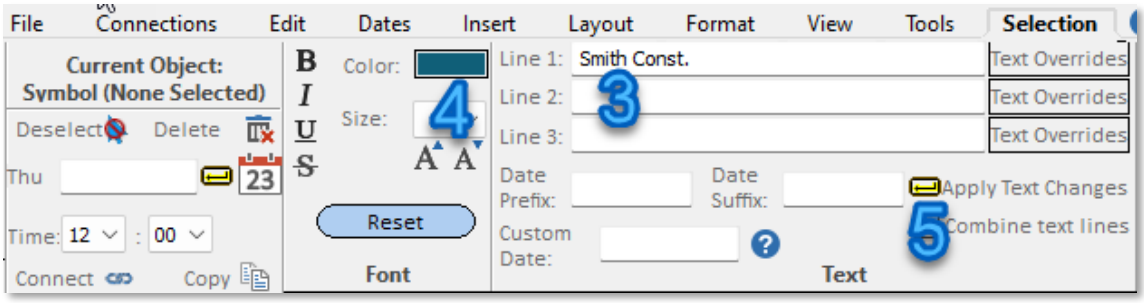
By selecting a symbol or group of symbols (use the shift key) on the schedule they may have their own symbol attributes.

Symbol text color override can be set for a symbol in the **ToolBox**, **Symbol Options** dialog choose the *Color/Pattern/Size/Shadow tab*.

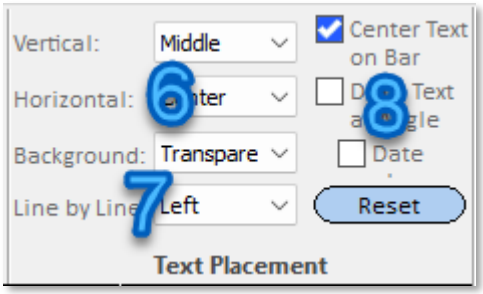
Add symbol text to the middle of the bar

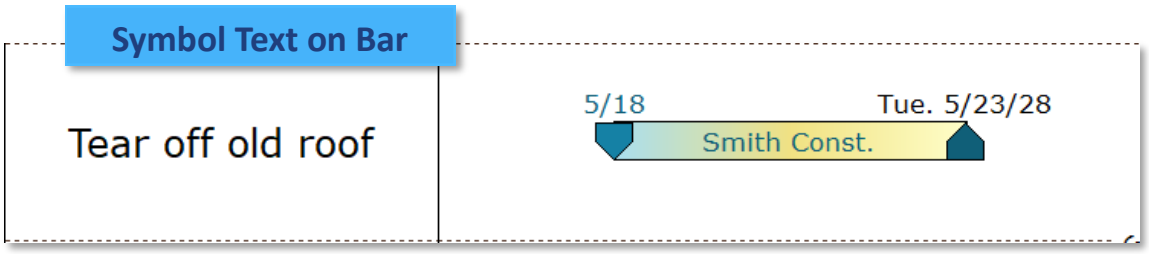
1. Click ↖ (*the toolbox Arrow tool*.)
2. Click the *start symbol for Tear off old roof*. The toolbar changes to the Selection tab and shows all the properties for the selected symbol.

Always use the left-most symbol to enter text for a bar.



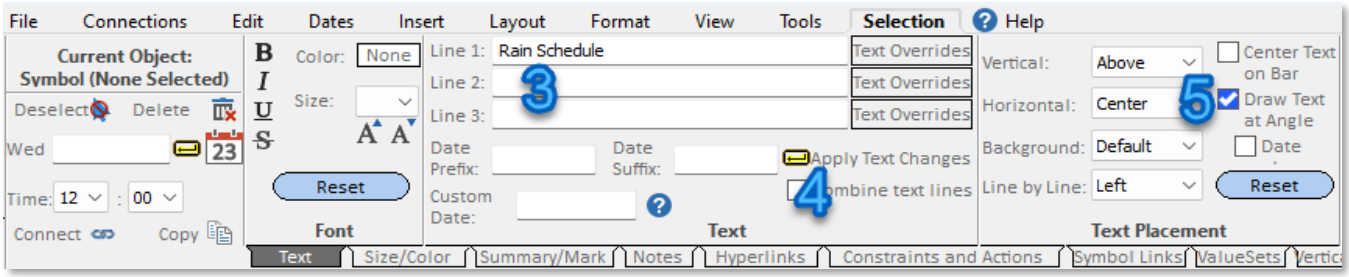
3. In the *Text* section for *Line* 1 type in *Smith Const.*
4. In the *Font* section, for *Color* choose *Teal*. This will also change the color for this symbol's date.
5. Press the *Apply Text Changes button*.
6. In the *Text Placement* section, for *Vertical* choose *Middle*.
7. In the *Text Placement* section, for *Background* choose *Transparent.*
8. In the *Text Placement* section, ☑*Center Text on* Bar.





Add angled symbol text

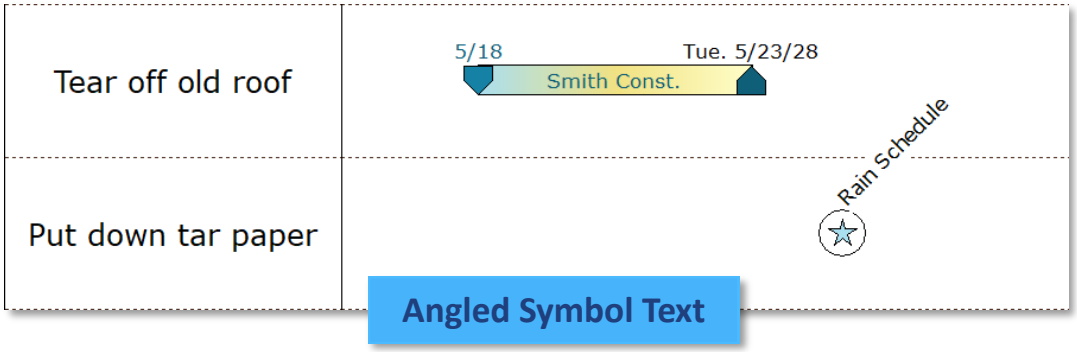
1. Click ↖ (*the toolbox arrow tool*.)
2. Click the ☆ (*the star symbol for the Put down tar paper step*.) The toolbar changes to the Selection tab and shows all the properties for the selected symbol.



3. In the *Text* section for Line 1, type in *Rain Schedule*.
4. Press the *Apply Text Changes* button.
5. In the *Text Placement* section, ☑ *Draw Text at Angle*.

Angled text will only show the first line of text as a single line of text regardless of how many lines of text are entered.

The default angle is set to 45 degrees. To change the angle select *Tools | Program Options | Edit | Angle for Angled Symbol Text* .



Add a symbol note with picture

Add a picture to the schedule and give it a tag for use in a symbol note

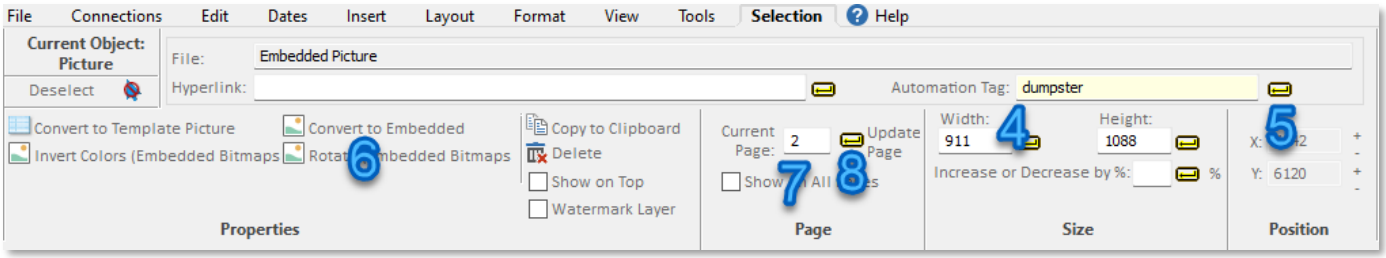
1. On the *Insert* tab, in the *Picture, Legend* section, choose *Picture from File*. Navigate to the Program Files\KIDASA\Milestones Professional 2025\Samples\Lessons and choose *dumpster.jpeg*

Before an image can be shown in a symbol note, it has to be added to the schedule.

2. When the (picture cursor) appears, click *anywhere on the schedule* to add the picture. Drag a corner of the picture to make it larger.

The size of the image on the schedule determines the size that will be shown in the symbol note.

3. With the ↖ (*toolbox Arrow tool*) click the picture just added to the schedule. The toolbar changes to the Selection tab with all of the picture's properties.



4. In the Automation Tag, type in *dumpster* to name the picture.

Images need to be named to display in a note.

5. Press the *Apply* button.
6. Choose *Convert to Embedded*.

If sharing the schedule with other users of Milestones Professional the picture needs to be embedded in the schedule.

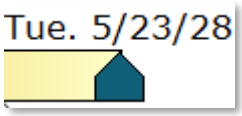
7. In the *Page* section, for Current Page enter *2*.
8. Press the *Update Page* button. The picture will be moved to page 2 and now is ready to be used in a note.

Moving a picture to a page does not add a page to the file. It stores the picture on that page. *Tools | Manage Pictures* makes it easy to find, move from page to page or delete a picture.

9. Continue to next page to place the picture in a note

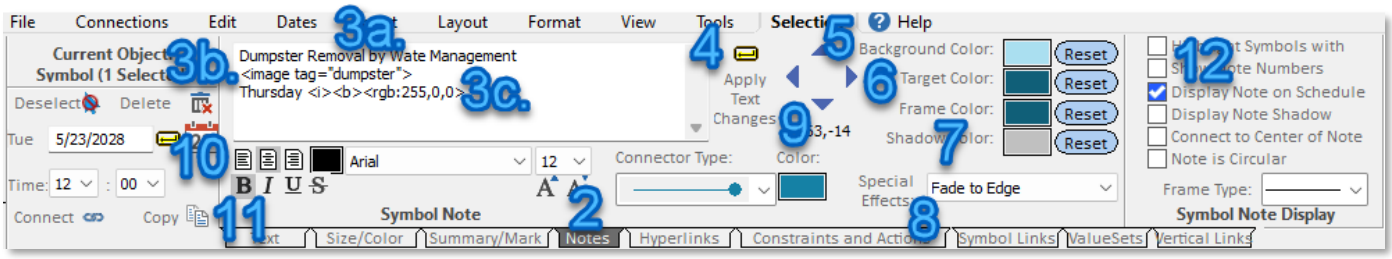
Add a symbol note with picture (continued)

Add a note with a picture to a symbol



1. Click ↖ (*the toolbox arrow tool*.) Click *the end symbol* for Tear off old roof.

2. The toolbar changes to the Selection tab for the symbol. At the bottom of the toolbar choose the *Notes* tab. The toolbar now shows the selected symbol's note properties.



3. In the note text box type in

   a. *Dumpster removal by Waste Management.*

   b. Press the keyboard *Enter* and type in the following markup code to have the picture show in the notes on the schedule. *<image tag="dumpster"> (The dumpster in the tag refers to the picture which was "tagged" dumpster in an earlier step.)*

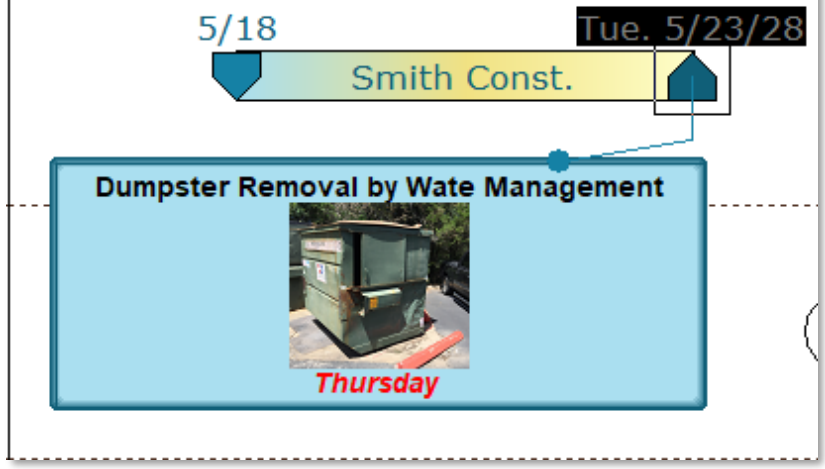
   c. Press *Enter*. Then type in the following: *Thursday <i><b><rgb:255,0,0>* (Anything inside <> is a "markup code" used to change the characteristics of that line of text <i> for Italic, <b> for bold, and <rgb:255,0,0> for red.)

To set symbol note default properties for text and look choose **Format | Default Text |*Symbol Notes*.**

Use hard line breaks to control the line breaks in the displayed note, as text is not word wrapped. A line is limited to no more than 150 characters.

4. Press the *Apply Text Changes* button.
5. For Background Color: pick *Light Blue*.
6. For Target Color: pick *Teal.*
7. For Frame Color: pick *Teal*.
8. For Special Effects: pick *Fade to Edge*.
9. For Connector type Color: pick *Teal.*
10. Pick the icon to *center the text.*
11. Select *B* to bold text.
12. In the Symbol Note Display section, ☑ *Display Note on Schedule*.

Symbol Note With Picture



To move a symbol note use ↖ (*the toolbox arrow tool*.) Click and drag the symbol note.
OR
Select *the symbol which has the note*. The toolbar is now active for the note. Use the *toolbar directional arrows* to move the symbol note.



Add a symbol note with picture (continued)

Result

Roof Project

Project Steps	FY28							
	17	18	19	22	23	24	25	26
	W	T	F	M	T	W	T	F
Get materials			*Materials:* Tar Paper, Shingles, Nails 5/18Est.					
Tear off old roof			5/18 Smith Const.			Tue. 5/23/28		
Put down tar paper			Dumpster removal by Waste Management.  Thursday			Rain Schedule		
Nail on shingles			3 Man crew to arrive by 8am daily				5/24	