Milestones PROFESSIONAL® TUTORIALS

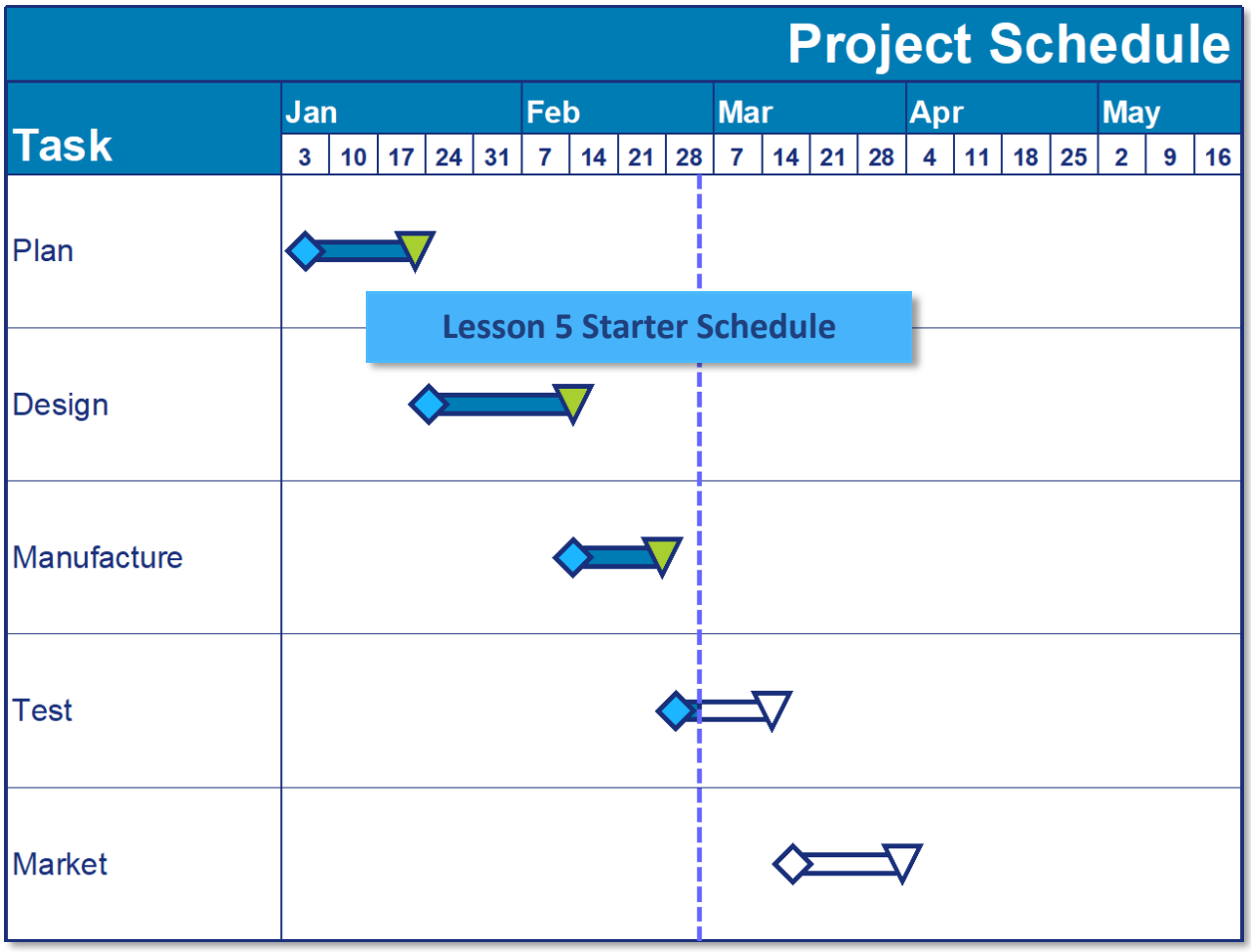
Lesson 5
Work with dependencies

In this lesson you will learn how to:

- Set up dependencies using the Insert menu
- Set up dependencies using the toolbox
- Set up dependencies using the toolbar
- Adjust the entire schedule using *Shift All Dates*
- Adjust the schedule using dependencies

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*.
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.

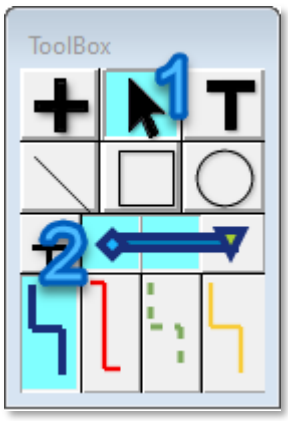


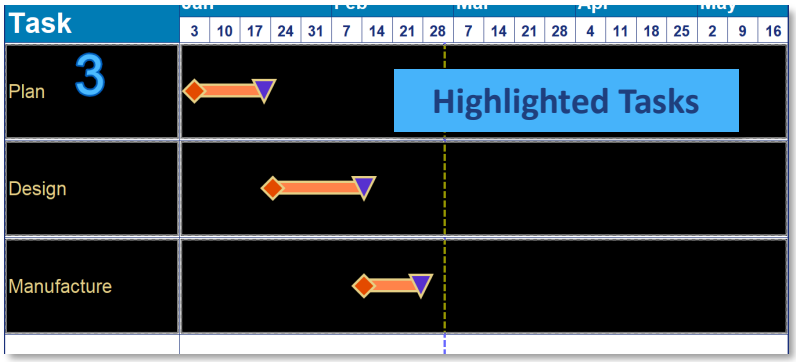
Set up dependencies using the Insert menu

Add a vertical link from Plan to Design and from Design to Manufacture

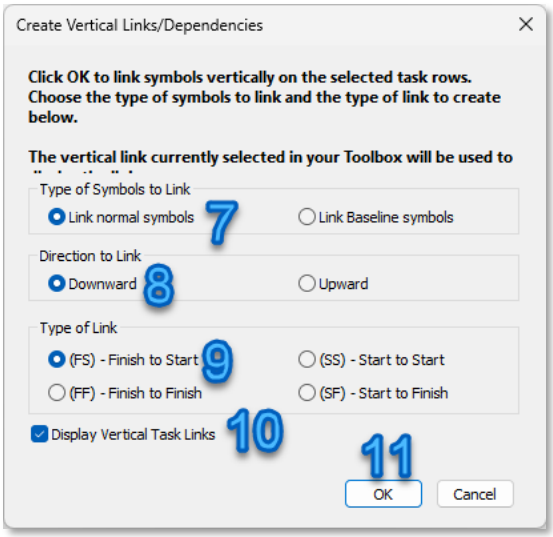
There are three methods to add vertical links.

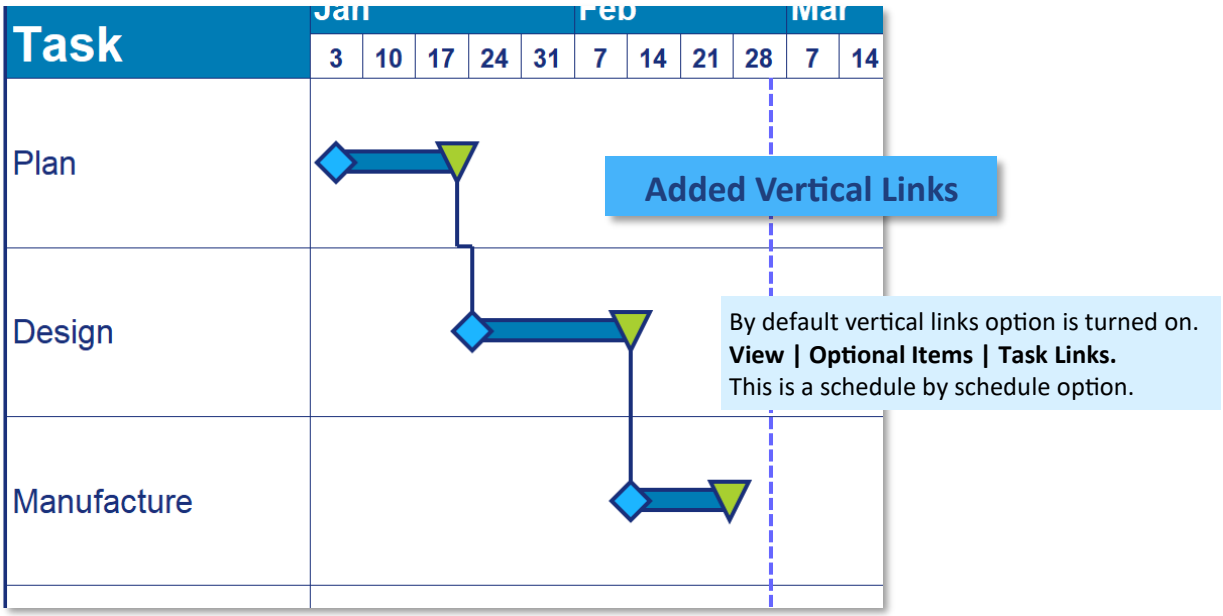
1. Click ↖ (*the toolbox arrow tool)*.
2. Click once on ┗ (*the dark blue vertical link in the toolbox*.)
3. While holding the *Shift* key on the keyboard, click once on the word *Plan*, and then once on the word *Manufacture*. Now, release the *Shift* key. The Plan, Design and Manufacture task rows should be highlighted in black.





4. Click the toolbar *Insert tab*.
6. In the Vertical Links section, select *Vertical Links between selected task rows*. The Create Vertical Links/ Dependencies dialog displays.
7. For Type of Symbols to Link choose *Link normal symbols*.
8. For Direction to Link choose *Downward*.
9. For Type of Link choose *(FS) - Finish to Start* (connects the end symbols on one task row to the start symbols on the next task row).
10. ☑ *Display Vertical Task Links*.
11. Select *OK*. Then click away from the schedule to de-select task rows. Vertical links will be added.



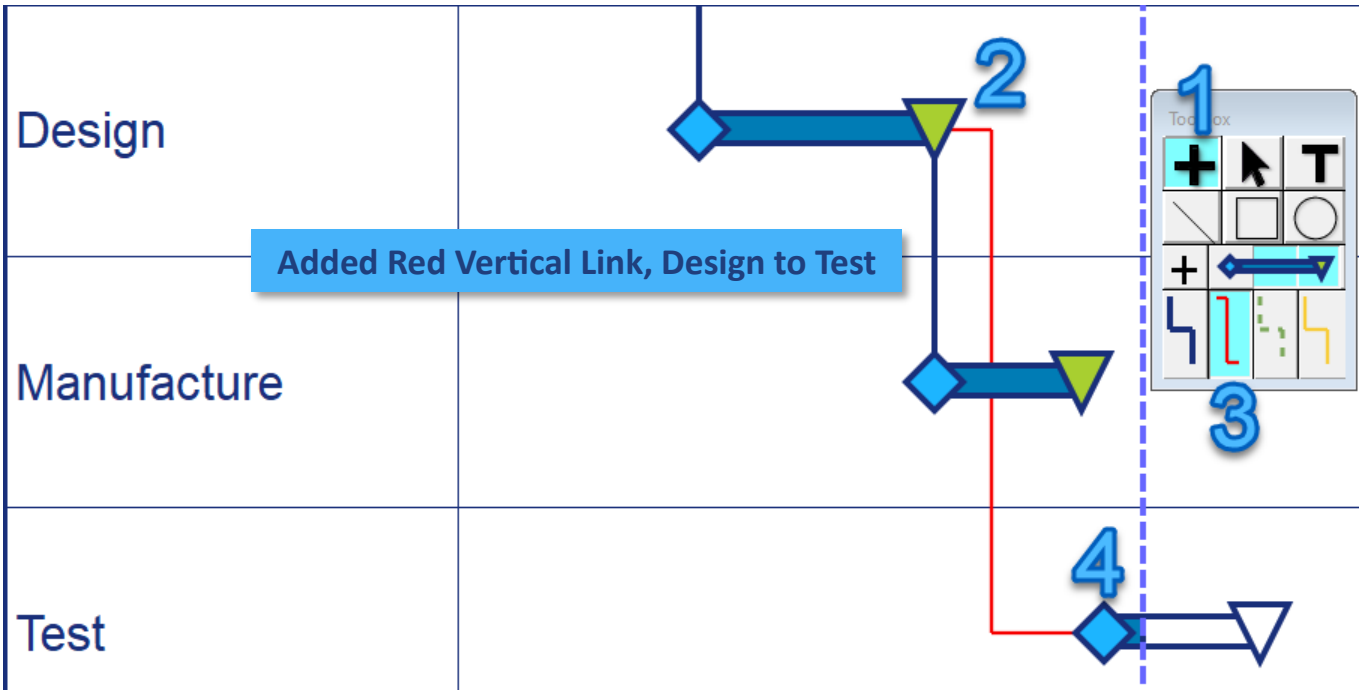


Set up dependencies using the toolbox

Add a vertical link From Design to Test

1. Click + (*the toolbox plus tool*.)
2. In the schedule, click once on the *end symbol of Design* (green inverted triangle). It will highlight with a box around it.
3. Click *(the toolbox red vertical link*.)
4. In the schedule, click once on the *start symbol of Test (blue diamond).* The vertical link will be added.

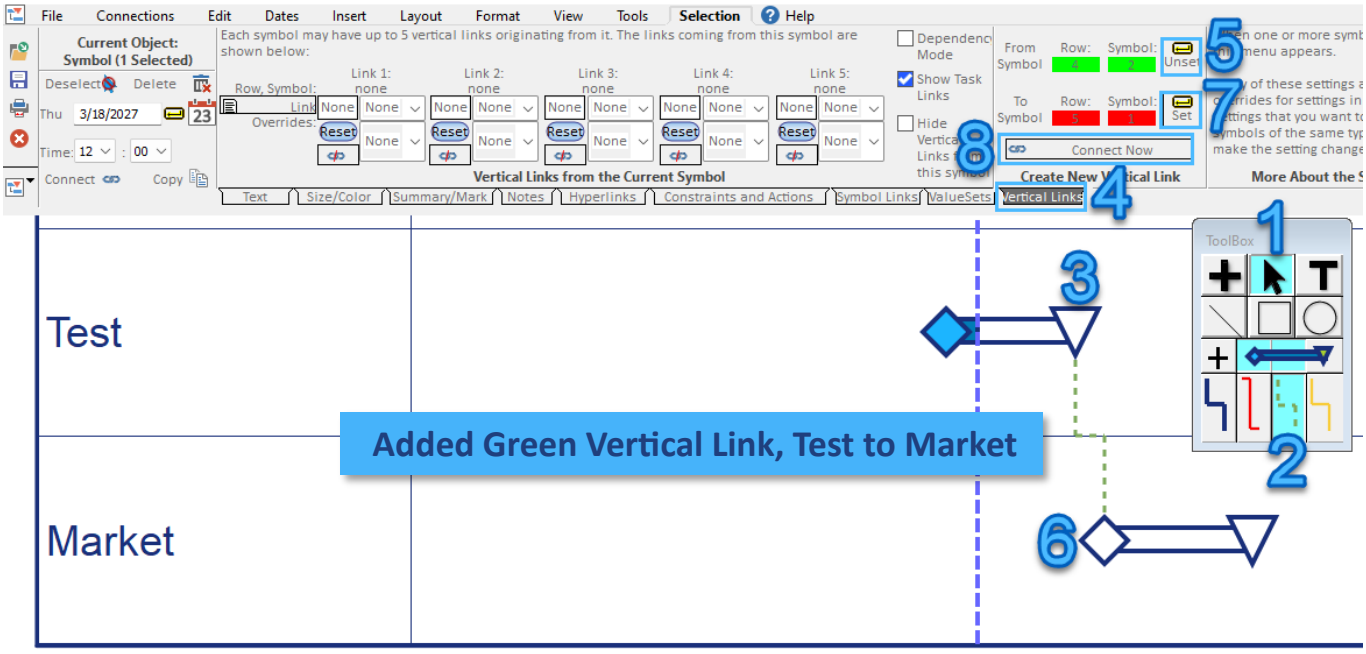




Set up dependencies using the toolbar

Add a vertical link From Test to Market

The third method for adding vertical links is using the toolbar. This is the most effective option to insert a vertical link across multiple pages of a schedule.

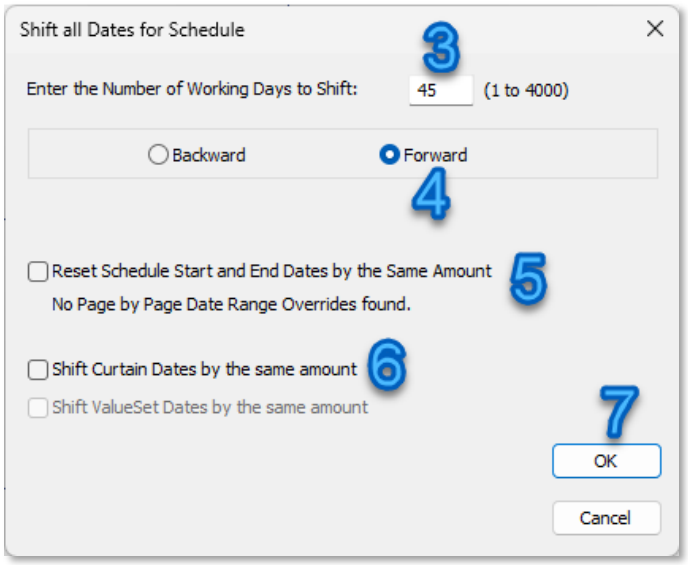


1. Click ↖ (*the toolbox arrow tool*.)
2. Select the *green dashed vertical link* in the toolbox.
3. On the schedule, click the *end symbol of Test (white upside down triangle.)* The toolbar changes to show properties for symbol. This is considered the From Symbol of the vertical link.
4. At the bottom of the toolbar choose the *Vertical Links* tab.
5. In the Create New Vertical Link section of the toolbar, select the *Unset/Set* button next to the From Symbol location. (Milestones notes the row the symbol is on and the symbol's order number on the row.) When the Unset/Set button is set to the symbol's coordinates it will highlight in green.
6. On your schedule, select the *start symbol of Market (the white diamond)*. This is considered the To Symbol of the vertical link. The toolbar is now active for the diamond symbol and should still be on the Vertical links tab.
7. In the Create New Vertical Link section of the toolbar, click the *Unset/Set* button next to the To Symbol location (Milestones notes the row the symbol is on and the symbol's order number on the row.) When the Unset/Set button is set to the symbol's coordinates it will highlight in green.
8. To complete the connection select Connect Now the *Connect Now* button. The vertical link will be added.

Adjust the entire schedule using *Shift all task dates*

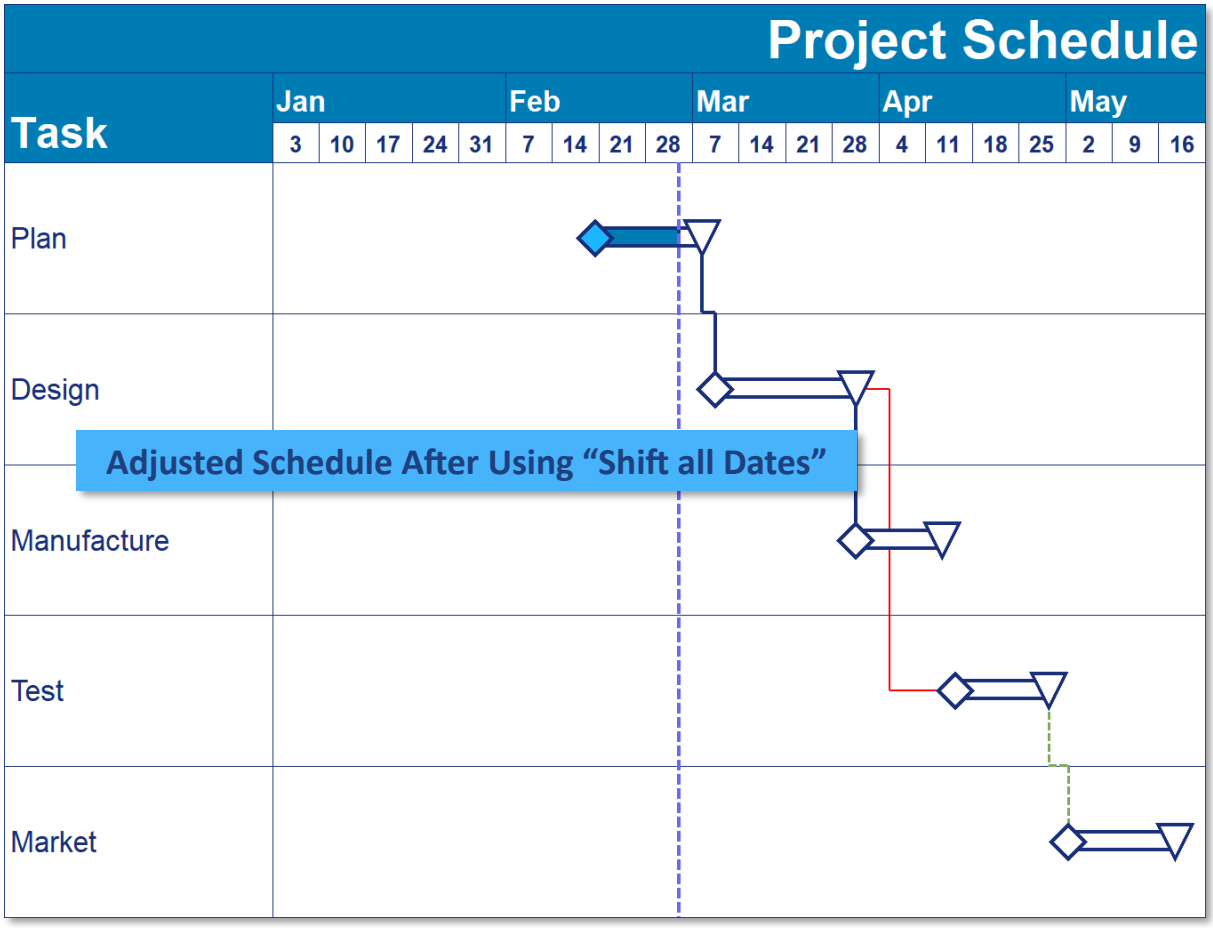
Suppose an entire project schedule needs to be moved forward because it cannot start at the scheduled time. One option is to use the *Shift all task dates* option.

1. Click the toolbar *Dates tab*.
2. In the Date Range Tools section choose *Shift all tasks dates*. The Shift all Dates for Schedule dialog displays.
3. For Number of Working Days to Shift, enter *45*.
4. Select *Forward*.
5. Uncheck *Reset Schedule Start and End Dates by the Same Amount*.
6. Uncheck *Shift Curtain Dates by the same amount*.
7. Click *OK*. The schedule shifted ahead 45 **days.**



Shift all task dates can be used for selected symbols and selected task rows.
In the Shift all Dates for Schedule dialog the option allowing just the selected tasks or symbols to shift must be ☑.

Note: No dependent symbols shift when using this option.



Adjust the schedule using dependencies

Turn on Dependency Mode

Dependency mode is a global setting which controls whether or not dependent symbols will move when a parent symbol moves.

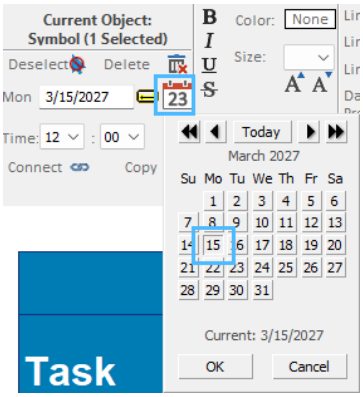
1. Click the toolbar *Dates tab*.
2. In the Date Related Settings section ☑ *Dependency Mode*. Now dependent symbols will move when a parent symbol moves.

Dependency Mode can also be turned on/of f n the status bar at the bottom right of the Milestones' window.

Adjust the schedule

The schedule shows the Plan stage to be completed the week of March 7th the actual day March 8th. However, the Plan stage will finish one week late, the week of March 14th, the actual day March 15th.

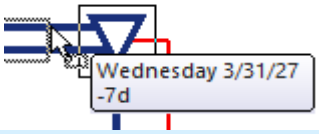
1. Click the ↖ (*the toolbox arrow tool*.)
2. Click on the *end date symbol for Plan*. The toolbar changes to the Selection tab Current Object: Symbol.
3. In the first section of the Toolbar click the *Calendar* icon next to the symbol's date. A calendar displays.
4. Click *March 15th* on the calendar. The shift all dependent symbols dialog displays, select *Yes*. Now, all of the dependent tasks have shifted forward by the same amount of time.



Change the length of "Design"

Since the Plan stage has slipped we'll cut 1 week from the Design step.

1. Click the ↖ (*the toolbox arrow tool*.)
2. Click and drag the end *date symbol of Design* to the left. Release the mouse when the symbol is on *March 31th*. All of the dependent tasks have shifted Backwards by the same amount of time.



The date will display next to the cursor as the symbol is moved or view the status bar at the bottom left of the Milestone's window to see the date as the symbol moves.

