Milestones PROFESSIONAL®

TUTORIALS

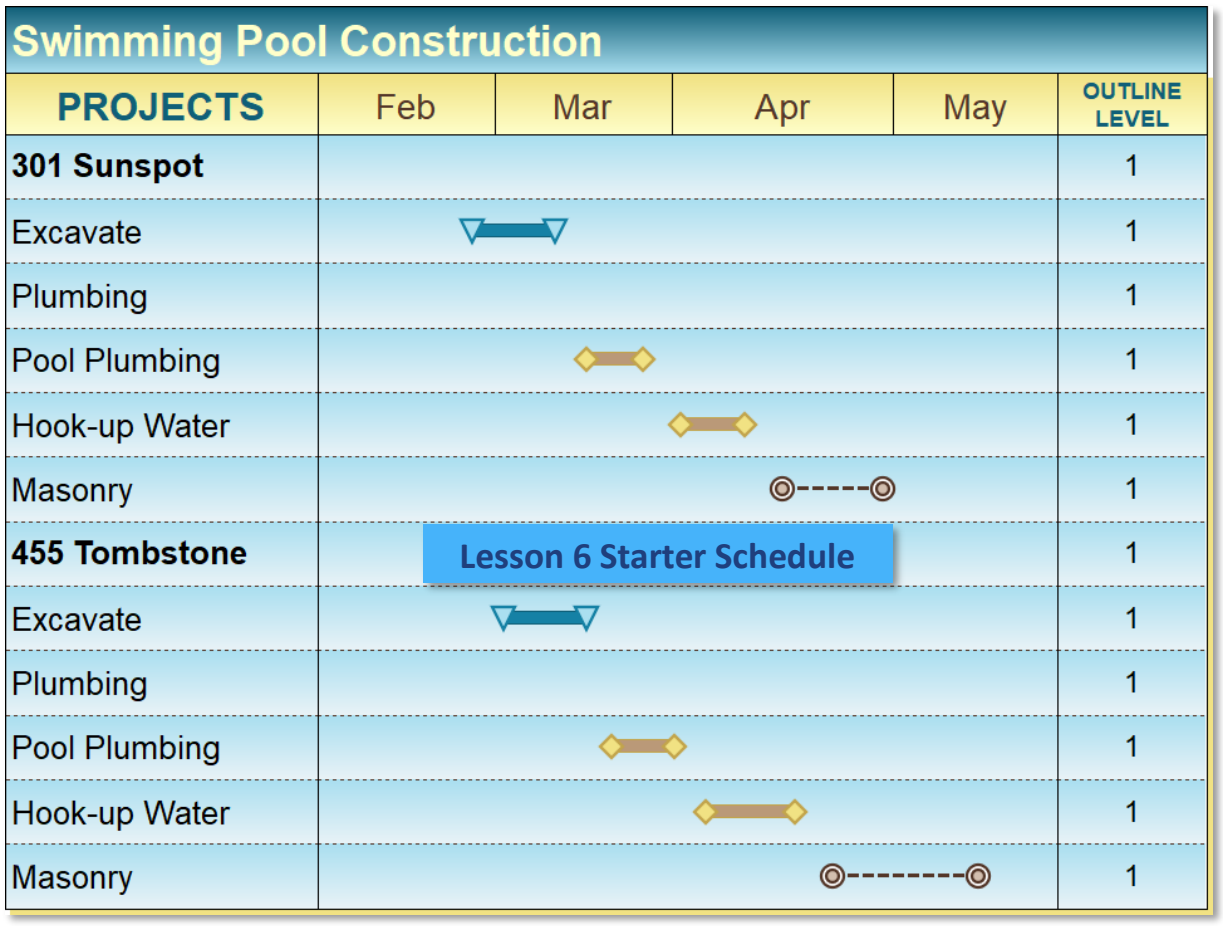
Lesson 6
Outline a schedule

In this lesson you will learn how to:

- Set up indenting for a column
- Outline the steps in the project
- Set summary bar options
- Collapse and expand tasks
- Organize the schedule using WBS numbering

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 06 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*…. and then *Chart*. Name, and then save the schedule.



Set up Indenting for a column

The Indent/Outdent tools icons make it easy to change the outline level of each task.

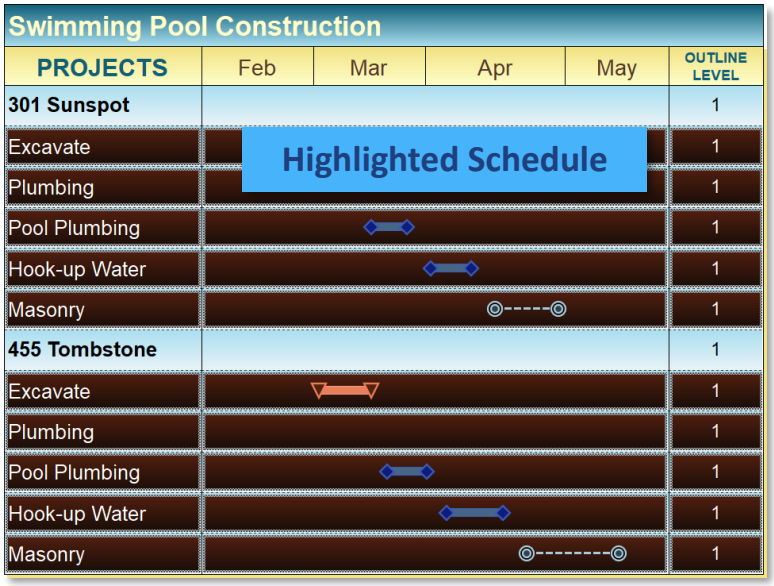
1. Click ↖(*the toolbox arrow tool*.)
2. Click on the word *PROJECTS.* The toolbar will change to the Selection tab with properties for the column heading.
3. Select Switch to Column *Switch to Column*.
4. In the Column Type and Format section, under Indent per Outline Level type in *0.2*.
5. Then click *(the apply button*). The column will now be indented when outlined. Right now, there is no difference on the schedule. You will outline the task rows in the next section of this tutorial. The task row indented to level 2 will indent .2. The next task row indented to level 3 will indent .2 plus .2 more and so on.

To have the keyboard **Tab** key used for indenting choose *Tools | Program Options | Edit |Use TAB key for Outlining*.

Outline the steps in the project

Indent selected tasks from Outline Level 1 to 2.

Indent the project steps under each street address, changing their outline level from 1 to 2.

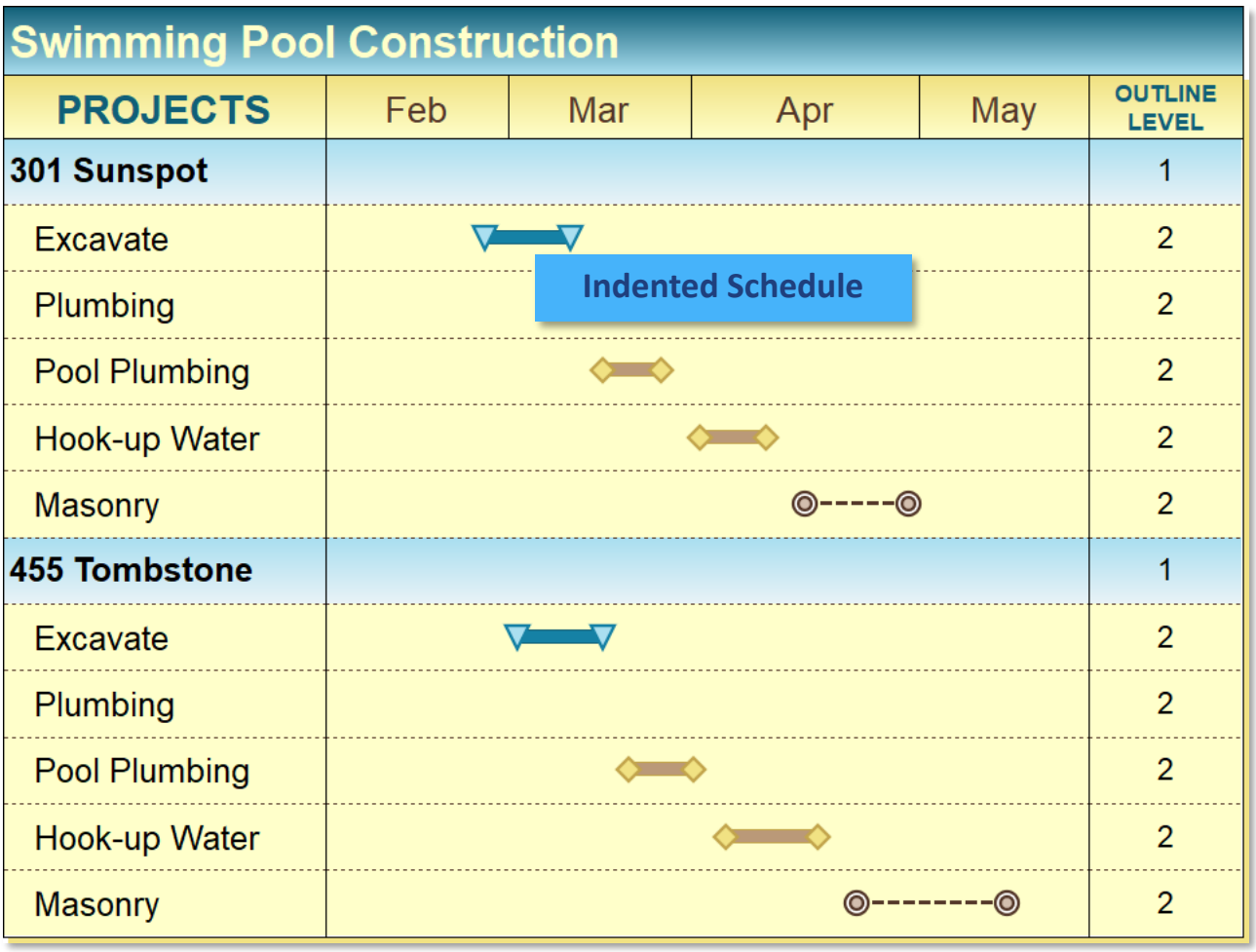


1. Click ↖ (*the toolbox arrow tool*.)
2. Holding the keyboard *Ctrl* key down, in the PROJECT column, *click once on each of the project steps that are not an address.* When selected, the task rows will highlight and the toolbar will change to the Selection tab with properties for the task row.
3. Click once on (*the toolbar indent icon*.) The selected steps are now at outline level 2.
4. Click anywhere within the schedule area to de-select the project steps. Notice that the tasks which are now outlined at level 2 have been indented by .2 and are shaded differently. This schedule is set up with outline level shading.

To change task row colors and attributes based on outline level, choose *Format | Gridlines | Gridlines Shading, Font Sizes by Outline Level*.

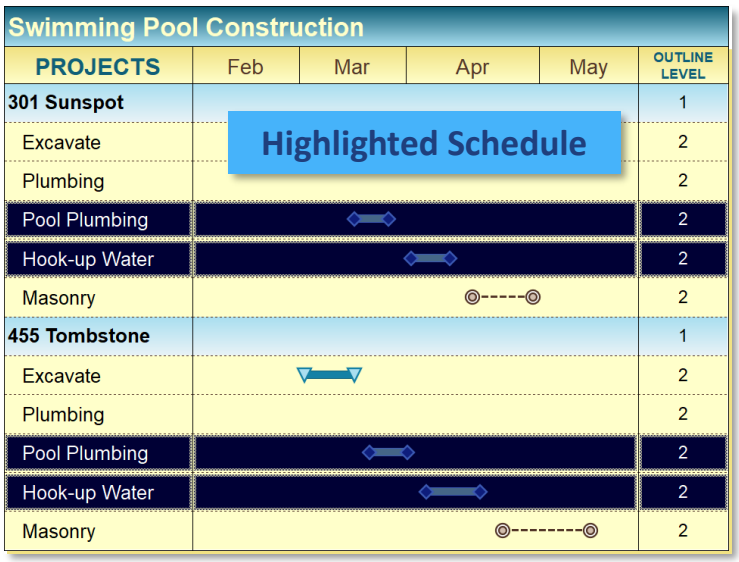
Outline the steps in the project (continued)

Result



Indent selected tasks from Outline Level 2 to 3.

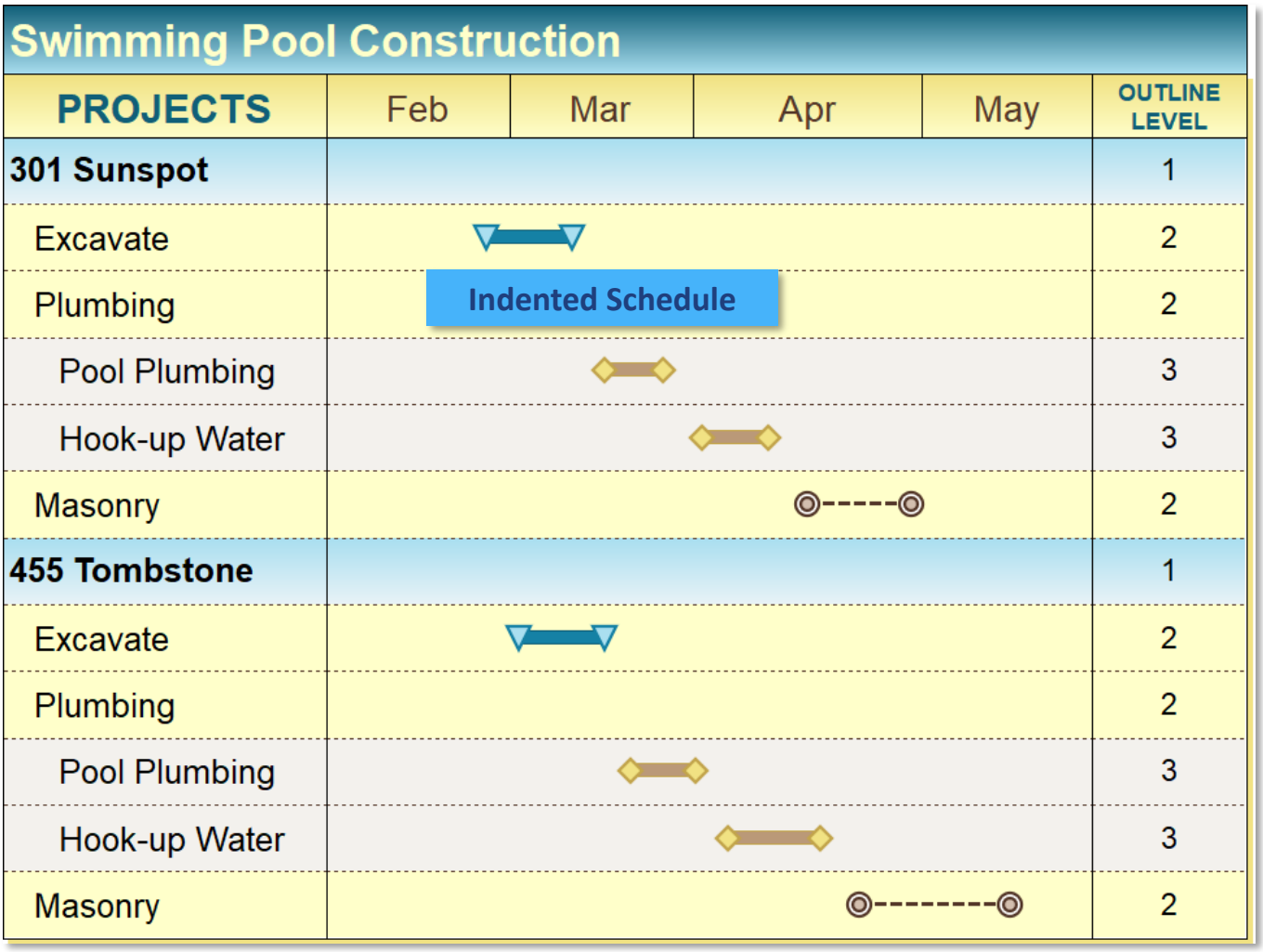
1. Click ↖ (*the toolbox arrow tool.*)
2. Holding the *Ctrl* key down, click once on *Pool Plumbing* and once on *Hook-up Water* for each street address. When selected, the task rows will highlight and the toolbar will change to the **Selection** tab with properties for the selected task rows.
3. Click once on ➡ (*the toolbar indent tool.)* These steps are now at outline level 3.
4. Click anywhere *within the schedule area* to de-select the project steps. Notice that the tasks which are now outline level 3 are indented by .4 and shaded differently. This schedule is set up with a different color shading for each outline level.



To change task row colors and attributes based on outline level, choose *Format | Gridlines | Gridlines Shading, Font Sizes by Outline Level.*

Outline the steps in the project (continued)

Result

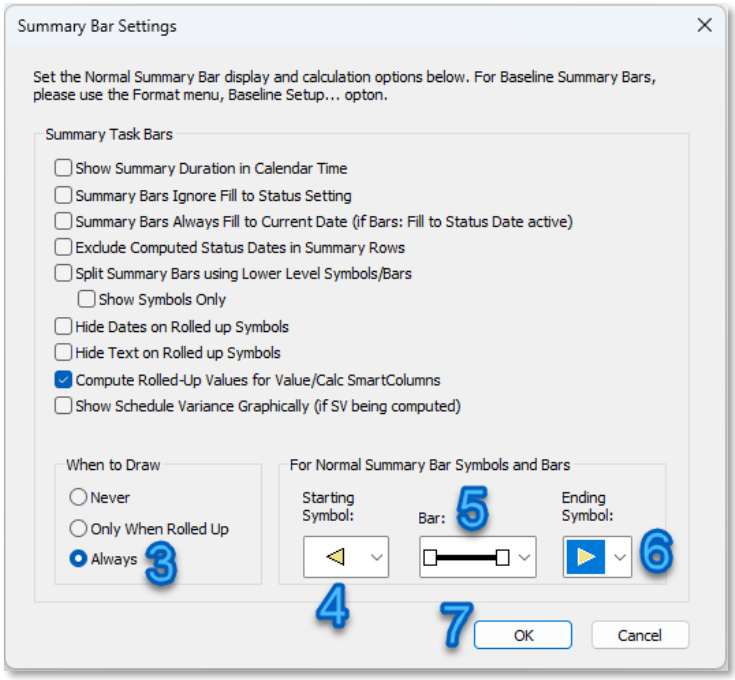


Notice that on the level 1 and 2 tasks, no schedule information was added for these tasks. Now that the task are indented, Milestones Professional's Summary Bar Setting options can be set to draw the summary information. In the next section of the tutorial you will turn on Summary Bar Setting options.

Set summary bar options

Draw a single summary bar for all lower level symbols.

1. Choose the toolbar *Layout tab*.
2. In the Other section, choose *Summary Bar Settings*. The Summary Bar Settings dialog box will display.
3. Under When to Draw, select *Always*.
4. Under For Normal Summary Bar Symbols and Bars, for the Starting Symbol select the down arrow and choose the third symbol (*gold triangle pointing left*.)

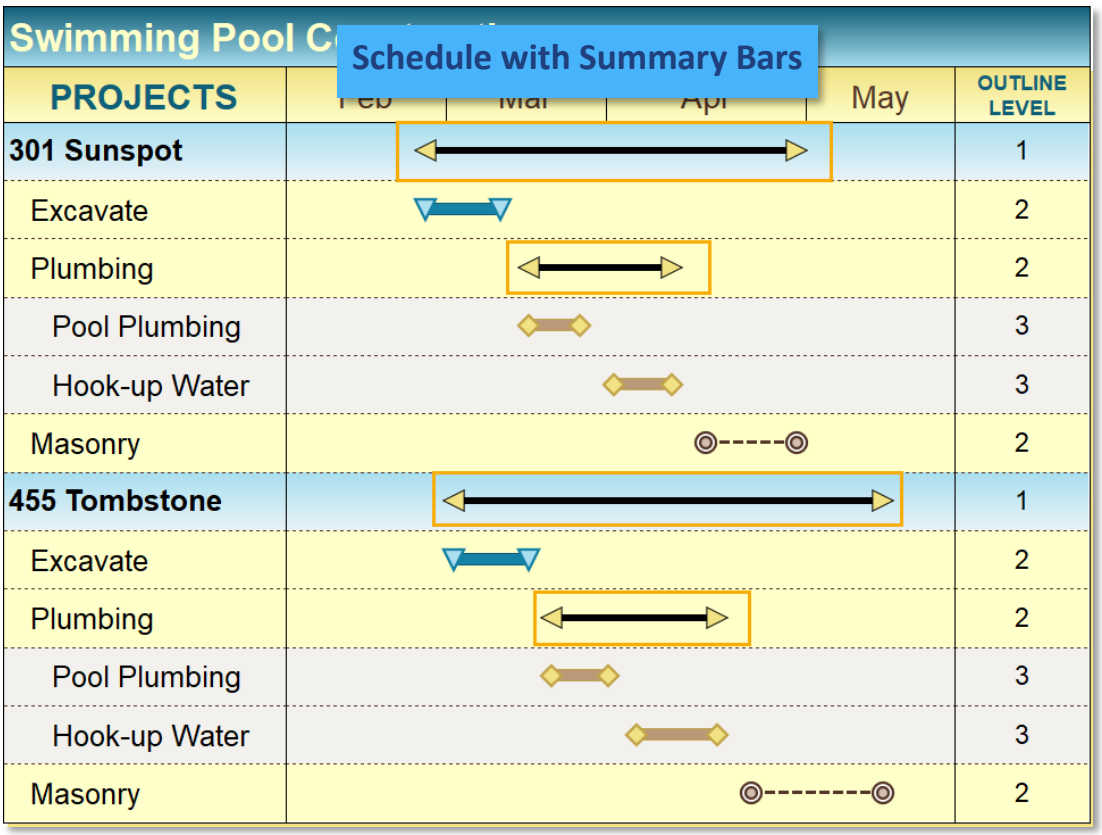


> Symbols and horizontal bars available in the summary drop down are from the toolbox.

5. Under For Normal Summary Bar Symbols and Bars, for the Bar select the down arrow and choose the second bar (*thin black bar*.)
6. Under For Normal Summary Bar Symbols and Bars, for the Ending Symbol select the down arrow and choose the fourth symbol (*gold triangle pointing right*.)
7. Click *OK*.

Result

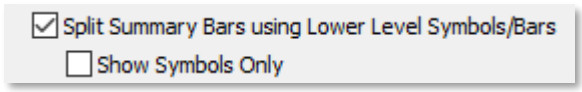
Summary bars are drawn on the top level task rows. The start symbol is drawn at the earliest date of the lower level tasks. The end symbol is drawn at the latest date of the lover level task.



Set summary bar options (continued)

Set lower level symbols and bars to rollup to the summary level

In the Summary Bar Settings dialog box, ☑ *Split Summary Bars using Lower Level Symbols/Bars*.



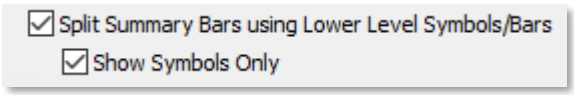


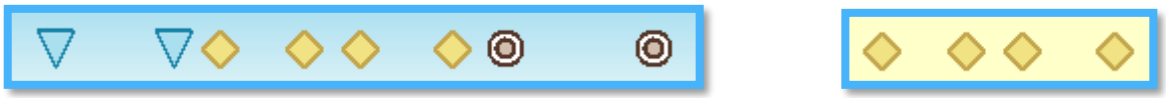
Summary with Lower Level Symbols and Bars

301 Sunspot		1
Excavate		2
Plumbing		2
Pool Plumbing		3
Hook-up Water		3
Masonry		2

Have only lower level symbols rollup to the summary level.

In the Summary Bar Settings dialog box, ☑ *Split Summary Bars using Lower Level Symbols/Bars* and ☑ *Show Symbols Only*.





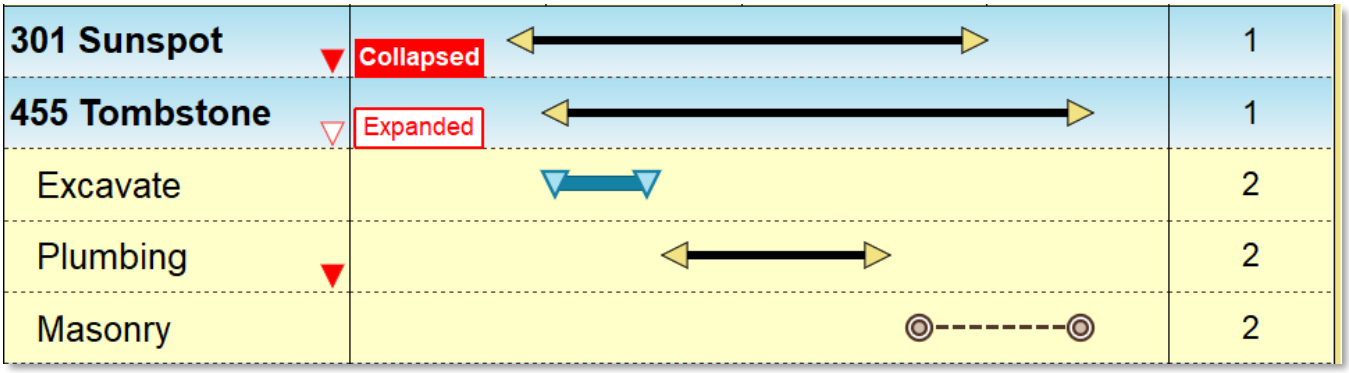
Summary with Only Lower Level Symbols

301 Sunspot		1
Excavate		2
Plumbing		2
Pool Plumbing		3
Hook-up Water		3
Masonry		2

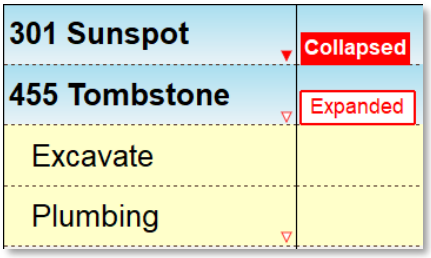
Collapse and expand tasks

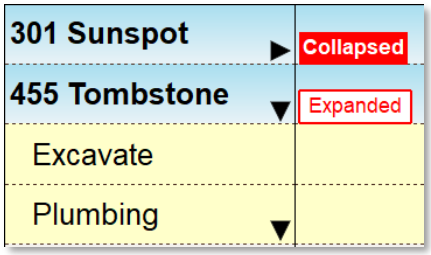
Turn on the Collapse/Expand Indicators

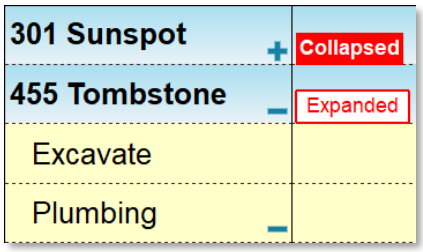
1. Choose the toolbar *View tab*.
2. In the **Optional Items** section ☑ *Collapse/Expand Indicators*. Indicators will be displayed beside every summary task in the left column closest to the schedule area.



In **Tools |Program Options |General** change the look (size, color, and/or shape) of the **Collapse/Expand Indicators**.



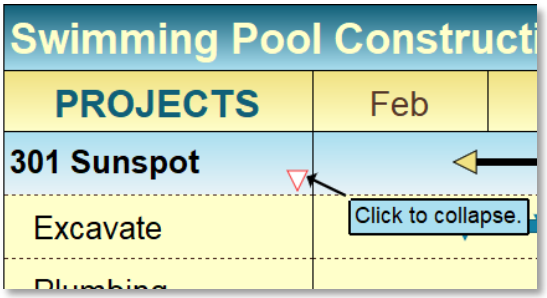




Collapse and expand tasks (continued)

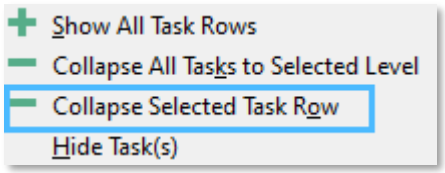
Collapse “301 Sunspot” using the Collapse/Expand Indicator

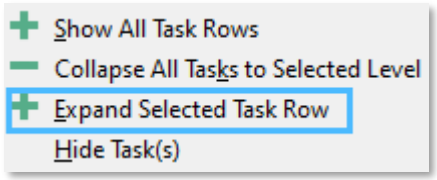
1. Click ↖ (*the toolbox arrow tool*.)
2. Click the *Collapse/Expand* Indicator to the right of 301 Sunspot.



Collapse "Plumbing" under “455 Tombstone” using the right-click menu

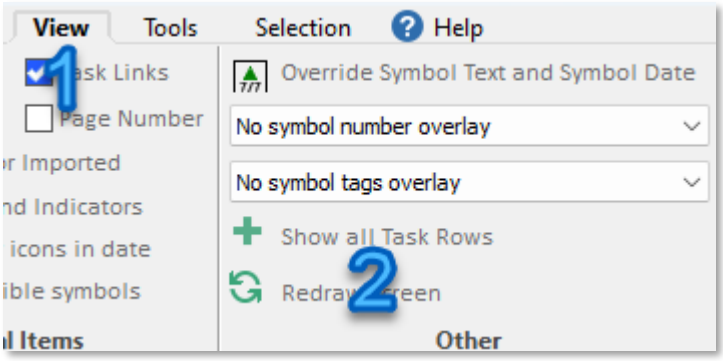
1. Right-click once on the word *Plumbing*. A menu will display.
2. Choose *Collapse Selected Task Row*.





Expand all project steps at once

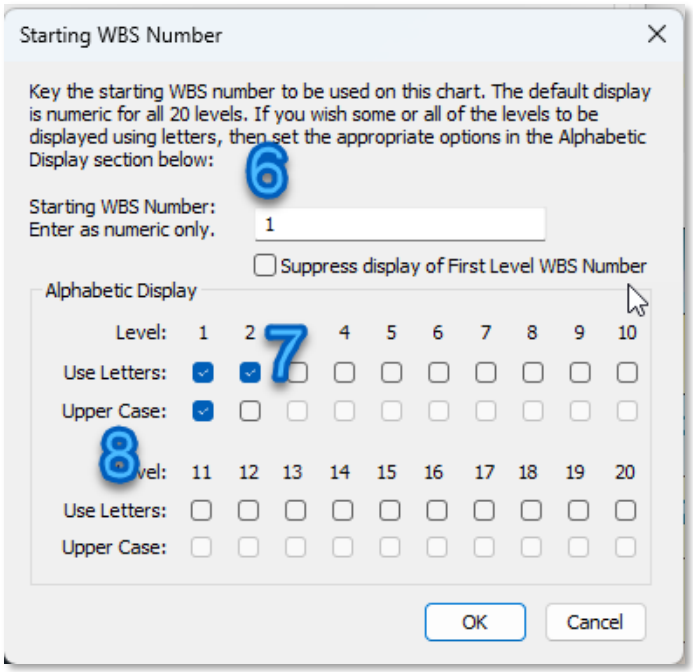
1. Choose the toolbar *View tab*.
2. In the **Other** section choose *Show all Task Rows*.



Organizing a schedule using WBS numbering

A WBS (Work Breakdown Structure) SmartColumn displays the outline level as 1, 1.1, 1.1.1,... instead of the Outline Level SmartColumn levels of 1, 2, 3,... A WBS number combines the task number and outline level into one number. Task 1 would have WBS number "1", Sub-task 1 of Task 1 would have WBS number "1.1", Sub-task 2 of Task 1 would have "1.2", and so on. Other options for WBS numbering are also available but for this lesson you will stick with the default.

1. Select ↖ (*the toolbox arrow tool*.)
2. Click on the word *PROJECTS.* The column heading will highlight.
3. Choose the toolbar *Insert tab*.
4. In the Rows, Columns section, choose *New Column*.
5. From the menu, choose *WBS Number*. The Starting WBS Number dialog box displays.
6. In the Starting WBS Number dialog box, for the Starting WBS Number enter *1*.
7. In the Starting WBS Number dialog box, under Alphabetic Display next to Use Letters: ☑ *Levels 1 and 2.*
8. In the Starting WBS Number dialog box, under Alphabetic Display next to Upper Case: ☑ *Level 1*.
9. Click *OK* and *OK*.



Schedule with WBS Column

Swimming Pool Construction						
WBS	PROJECTS	Feb	Mar	Apr	May	OUTLINE LEVEL
A	**301 Sunspot**					1
A.a	Excavate					2
A.b						2
A.b.1	Pool Plumbing					3
A.b.2	Hook-up Water					3
A.c	Masonry					2
B	**455 Tombstone**					1
B.a	Excavate					2
B.b	Plumbing					2
B.b.1	Pool Plumbing					3
B.b.2	Hook-up Water					3
B.c	Masonry					2