

Tutorials

Lesson 3 – Work with Text

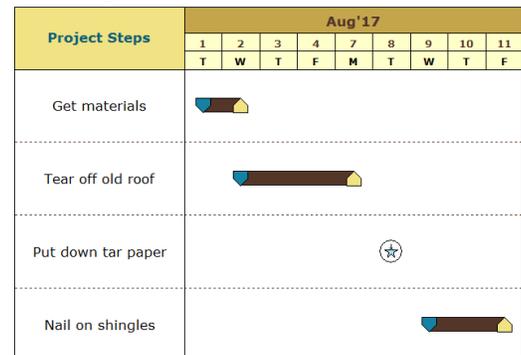
In this lesson you will learn how to:

- Add a border and shadow to the title.
- Add a block of freeform text.
- Customize freeform text.
- Display dates with symbols.
- Annotate a symbol using symbol text.
- Add text in the middle of a bar using symbol text.
- Add angled text.
- Adjust symbol and date text position.
- Add symbol notes.

Open the schedule for this lesson

1. On the toolbar choose the **File** tab.
2. In the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Open**.
3. Choose **Lesson Chart**.
4. Select **Lesson 3 Starter Schedule.mlf**.
5. Save the schedule to an folder on your computer, such as your **Documents** folder. Choose **File** tab, in the **Files and Templates: Open and Save Options** section. Click ▼ (the down arrow) next to **Save As ...** and choose **Chart**. You will now be able to work with and save this schedule.

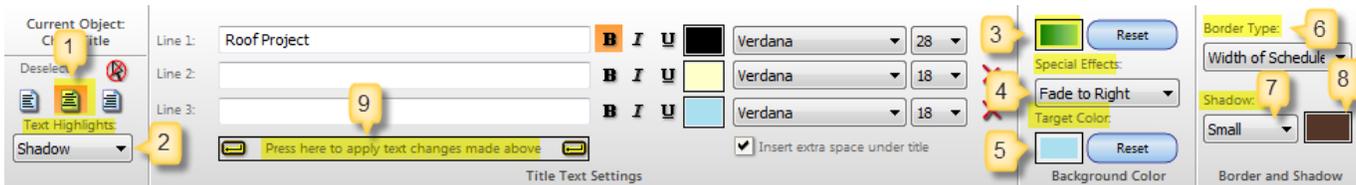
Roof Project



Lesson 3 starter schedule

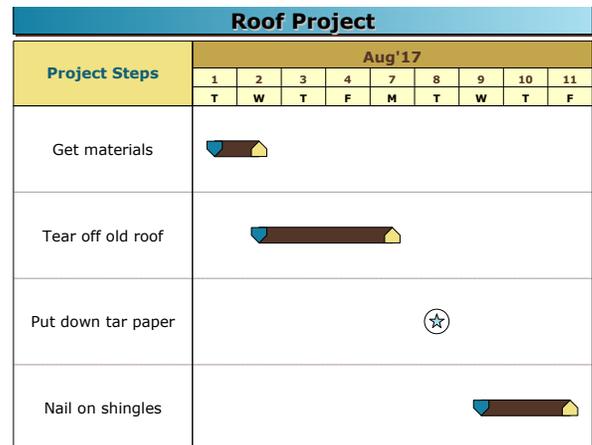
Add a border and shadow to the title

1. Click  in the toolbox.
2. Click the title **Roof Project**. The toolbar will change to the **Selection** tab with **Current Object: Chart Title**. It now displays all the chart title's properties. The image of the toolbar below shows the title properties to change.



Numbers 1-9 above refer to these numbered instructions:

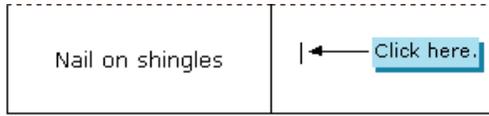
1. For title text justification, choose the center icon.
2. Under **Text Highlights** choose **Shadow**.
3. In the **Background Color** section click the top rectangle to open the color palette. Choose **teal** (or another color of your choice).
4. In the **Background Color** section, for **Special Effects** choose **Fade to Right**.
5. In the **Background Color** section, for **Target Color** click the rectangle to open the color palette. Choose light blue (or another color of your choice).
6. In the **Border and Shadow** section, **Border Type** choose **Width of Schedule**.
7. In the **Border and Shadow** section, **Shadow** choose **Small**.
8. In the **Border and Shadow** section, **Shadow** click the rectangle to open the color palette. Choose brown (or another color of your choice).
9. To have the changes applied to your schedule in the **Title Text Settings** section choose the  **Press here to apply text change made above** button.



Enhanced title

Add a block of freeform text

1. Click  in the toolbox.
2. Click in the schedule area, to the right of the **Nail on shingles** step.



Click Here

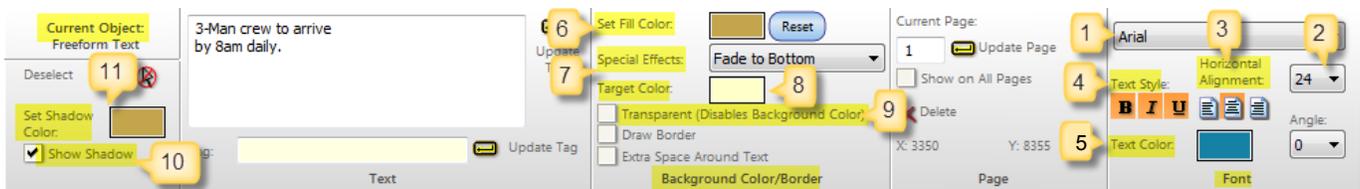
3. Type "**3-Man crew to arrive**".
4. Press **Enter** to split the text onto a new line.
5. Type "**by 8am daily**".

Roof Project											
Project Steps	Aug '17										
	1	2	3	4	7	8	9	10	11		
	T	W	T	F	M	T	W	T	F		
Get materials											
Tear off old roof											
Put down tar paper											
Nail on shingles	3-Man crew to arrive by 8am daily. 										

Freeform text

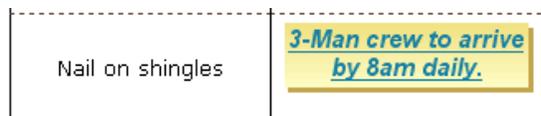
Customize freeform text

1. Click  in the toolbox.
2. Click the freeform text **3-Man crew to arrive by 8am daily**. The toolbar will change to the **Selection** tab with **Current Object: Freeform Text** and display the freeform text properties.



Numbers 1-11 above refer to these numbered instructions:

1. In the **Font** section change the font to **Arial**.
2. Change the Size to **24**.
3. For **Horizontal Alignment**, choose the center icon.
4. For **Text Style** click the **Bold, Italic and Underline** icons.
5. Click the **Text Color** rectangle to open the color palette. Choose teal.
6. In the **Background Color/Border** section click on the **Set Fill Color** rectangle to open the color palette. Choose **gold**.
7. Change the **Special Effects** to **Fade to Bottom**.
8. Click on the **Target Color** rectangle to open the color palette. Choose **light yellow**.
9. **Transparent (Disables Background Color)**.
10. **Show Shadow**.
11. Click on the **Set Shadow Color** rectangle to open the color palette. Choose **gold**.



Enhanced freeform text

- Freeform text placement can be adjusted by using the arrow tool in the toolbox.
- Change freeform text properties easily. First click the arrow tool in the toolbox. Click once on the text. The toolbar containing all of the freeform text properties will be shown.

Display dates with symbols

1. In the toolbox, double-click the  symbol that is used for the start symbols on your schedule. The **Symbol Options** dialog box displays.
2. Click the **Text and Date Properties** tab.
3. Under **Date Placement**, choose **Above** and **Center**.
4. Click **OK**. Each start symbol now has a date displayed above it.

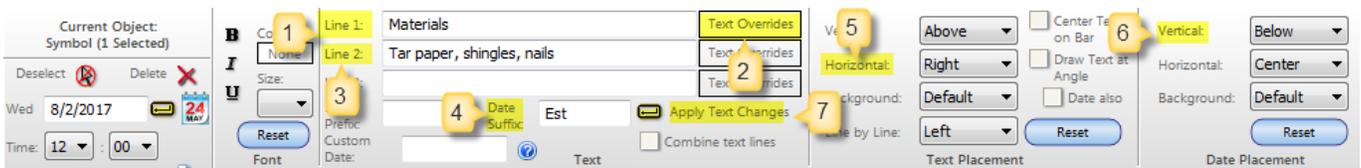
To change the format of the dates shown: choose the **Dates** tab. In the **Date Related Settings** section, click Set **Symbol Date Format**. Choose from a list of predefined formats (or create a custom format.)

Roof Project										
Project Steps	Aug '17									
	1	2	3	4	7	8	9	10	11	
	T	W	T	F	M	T	W	T	F	
Get materials	8/1									
Tear off old roof		8/2								
Put down tar paper										
Nail on shingles										8/9 

Dates displayed with symbols

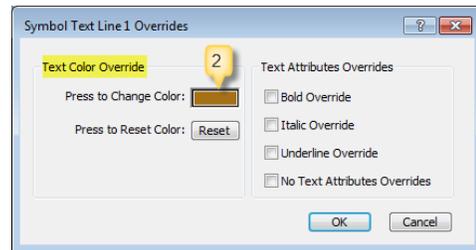
Annotate a symbol with symbol text

1. Click  in the toolbox.
2. Click the end symbol for the **Get materials** step. The toolbar will change to display all of the symbol's properties. The image of the toolbar below shows the symbol properties to change.



Numbers 1-7 above refer to these numbered instructions:

1. In the **Text** section for **Line 1** type in **Materials**.
2. In the **Text** section click **Text Overrides** for **Line 1**. The **Symbol Text Line 1 Overrides** dialog box will come up. Under **Text Color Override** click the **Press to Change Color** rectangle to open the color palette. Choose light brown. Click **OK**.
3. In the **Text** section for **Line 2** type in **Tar paper, shingles, nails**.
4. In the **Text** section for **Suffix**, type in **Est**.
5. In the **Text Placement** section for **Horizontal** choose **Right**.
6. In the **Date Placement** section for **Vertical** choose **Above**.
7. Press  the **Apply Text Changes** button.



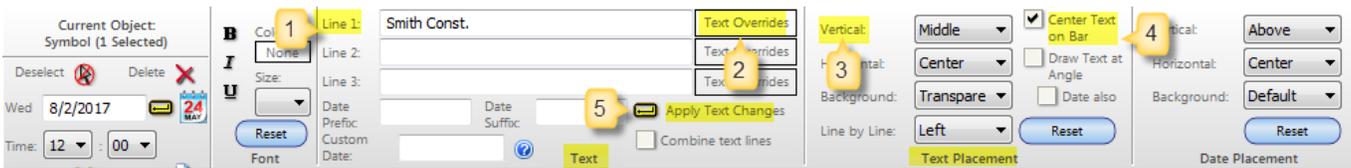
Just the month and day are displayed for symbol dates in this example. If you would like something different, choose the **Dates** tab. In the **Date Related Settings** section, click **Set Symbol Date Format** and choose from a list of predefined formats or create a custom format.

Roof Project										
Project Steps	Aug '17									
	1	2	3	4	7	8	9	10	11	
	T	W	T	F	M	T	W	T	F	
Get materials	8/1									
Tear off old roof		8/2								
Put down tar paper										
Nail on shingles										8/9 

Text added to a symbol

Add text in the middle of a bar using symbol text

1. Click  in the toolbox.
2. Click the start symbol for **Tear off old roof**. The toolbar will change to display all the symbol properties. The image of the toolbar below shows the symbol properties to change.



Numbers 1-5 above refer to these numbered instructions:

1. In the **Text** section for **Line 1** type in **Smith Const.**
2. In the **Text** section click **Text Overrides** for **Line 1**. The **Symbol Text Line 1 Overrides** dialog box will come up. Under **Text Color Override** click the **Press to Change Color** rectangle to open the color palette. Choose **light gold**. Click **OK**.
3. In the **Text Placement** section for **Vertical** choose **Middle**.
4. In the Text Placement section **Center Text on Bar**.
5. Press  (the **Apply Text Changes** button.)

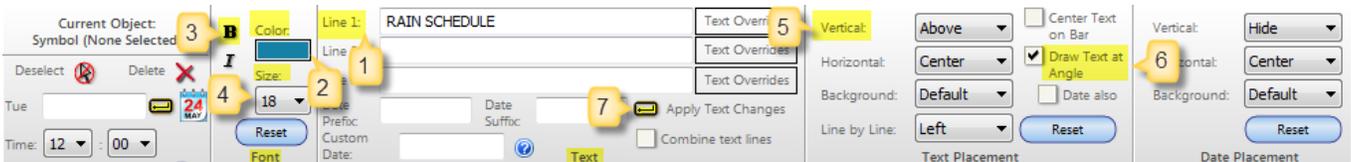
Always use the left-most symbol to enter text for a bar.

Roof Project	
Project Steps	Aug '17
	1 2 3 4 7 8 9 10 11
	T W T F M T W T F
Get materials	8/1 Materials Tar paper, shingles, nails 8/2Est
Tear off old roof	8/2 Smith Const.
Put down tar paper	(star icon)
Nail on shingles	3-Man crew to arrive by 8am daily. 8/9

Text in the middle of a bar

Draw symbol text at an angle

1. Click  in the toolbox.
2. Click the milestone for **Put down tar paper**. The toolbar will change to the **Selection** tab and display all the symbol properties. The image of the toolbar below shows the symbol properties to change. Numbers 1-7 are described below. .



Numbers 1-7 above refer to these numbered instructions:

1. In the **Text** section for Line 1 type in **RAIN SCHEDULE**.
2. In the **Font** section select the **Color** rectangle to open the color palette. Choose **teal**.
3. In the **Font** section choose **B** to bold the text.
4. In the **Font** section choose  (the down arrow) to select **Size 18**.
5. In the **Text Placement** section for **Vertical** choose **Above**.
6. In the **Text Placement** section **Draw Text at Angle**.
7. Press  (the **Apply Text Changes** button.)

Roof Project	
Project Steps	Aug '17
	1 2 3 4 7 8 9 10 11
	T W T F M T W T F
Get materials	8/1 Materials Tar paper, shingles, nails 8/2Est
Tear off old roof	8/2 Smith Const.
Put down tar paper	(star icon)
Nail on shingles	3-Man crew to arrive by 8am daily. 8/9

Angled text

- Angled text will only show 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 click the **Tools** tab in the **Program Options** section choose **Edit**. Under **Angle for Angled Symbol Text** click  (the down arrow) and choose the degree.

For future reference: tips for adjusting the position of symbol text

Vertically move symbol text

1. Select the symbol and the vertical line type to be used for vertical symbol text move. Choose the **Tools** tab. In the **Customize** section choose **Symbol Text Move**.
2. Using the scroll arrows choose a **Symbol** from the list that you are not currently using on your schedule. The symbol will then become an invisible symbol in the toolbox.
3. Using the scroll arrows choose a **Vertical link**.
4. Click  in the toolbox.
5. On the schedule, click once on the symbol with the text.
6. Hold down **Ctrl + T**.
7. Click and drag to move the invisible symbol and its text to another task row.

Adjust symbol text position with the keyboard:

1. Click  in the toolbox.
2. On the schedule, click once on the symbol with the text to be moved.
3. Hold down the **ALT key**.
4. Click the arrow keys on the keyboard to move the text around the symbol. The text will move as you click the arrow keys.

Adjust symbol date position with the keyboard:

1. Click  in the toolbox.
2. On the schedule, click once on the symbol with the symbol date to be moved.
3. Hold down **ALT + CTRL**.
4. Click the arrow keys on the keyboard to move the symbol date around the symbol. The symbol date will move as you click the arrow keys.

Symbol Notes

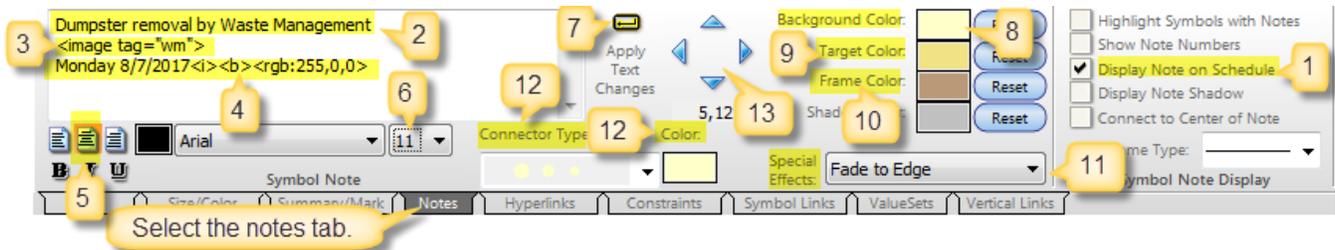
Next, you will add a symbol note with formatted text and a picture.

Add a picture to the schedule and give it a tag of "wm"

1. On the **Insert** tab, in the **Picture, Legend** section, choose **Picture from File** and add any picture you might have on your computer. When  (the picture cursor appears), click somewhere on the schedule to add the picture.
2. With (the arrow tool), click the picture which is now on the schedule.
3. For **Automation Tag**, enter **wm** and press  (the Apply Settings button.)

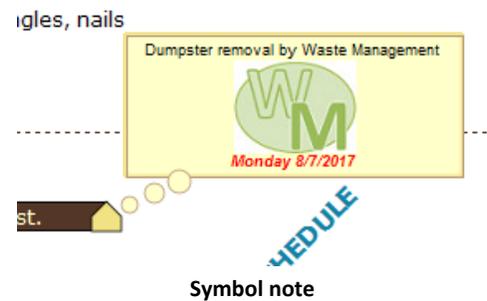
Add symbol notes to a symbol

1. Click  in the toolbox.
2. Click  On the **Selection** tab, choose the small **Notes** tab. The toolbar now displays symbol note properties.



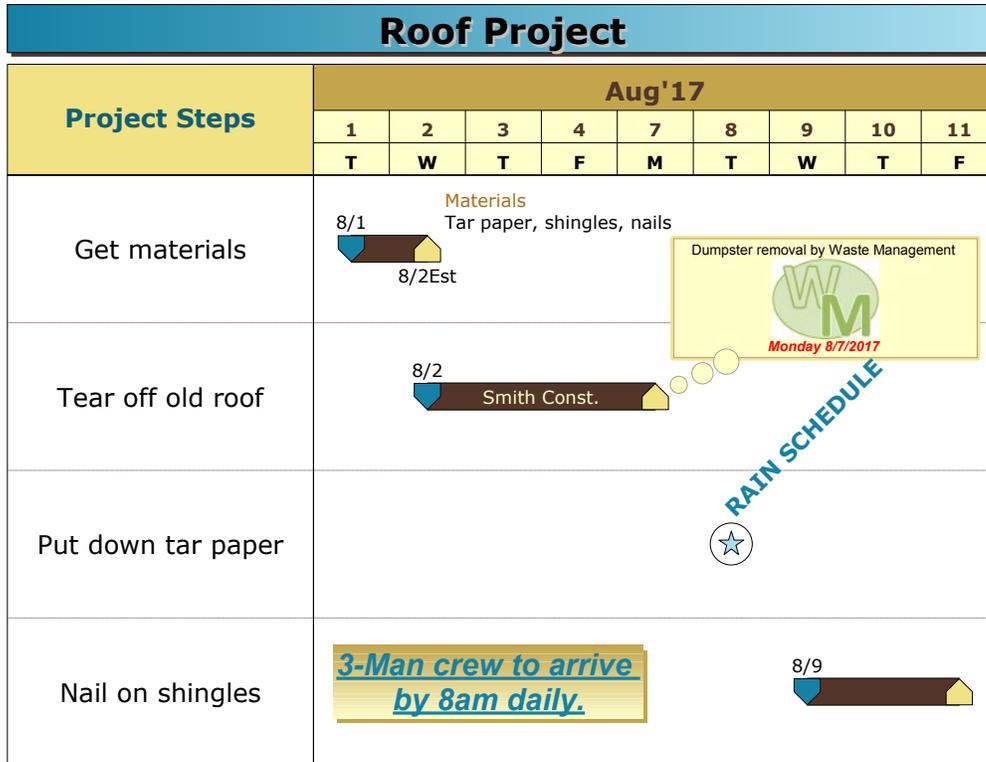
Numbers 1-12 above refer to these numbered instructions:

1. **Display Note on Schedule.**
2. In the note text box type in **Dumpster removal by Waste Management**
3. Press **Enter** on the keyboard and type in the following markup code to have the picture show in the notes on the schedule. **<image tag="wm">** (The *wm* in the tag refers to the picture which was "tagged" with *wm* in an earlier step.)
4. Press Enter and type in **Friday 8/9/2013**. Then type in the following: **Friday 8/9/2013**. **<i><rgb:255,0,0>** (Anything inside <> is a "markup code" <i> for Italic, for bold, and <rgb:255,0,0> for red. (See the image above with #3 which illustrates all that should be entered)
5. Choose to **center all the text**.
6. Set the font size to **11**.
7. Press  (the **Apply Text Changes** button.)
8. Select a **Background Color** by clicking on the colored box and selecting from the color palette.
9. Select a **Target Color** by clicking on the colored box and selecting from the color palette.
10. Select a **Frame Color** by clicking on the colored box and selecting from the color palette.
11. Choose the special effect **Fade to Edge**.
12. Choose a **Connector Type** and **Color**. The connector draws a link between the notes box and the symbol.
13. Use the direction controls to move the symbol note (or click and drag with the mouse.)



- Images need to be in the Milestones file to appear in a note. The image needs to be placed somewhere on the schedule and "tagged". (If the picture is not displayed on the schedule then place and tag the image on a unused page.) The **Manage Pictures** option on the **Tools** menu makes it easy to find and move pictures from page to page. Moving a picture to a page does not add a page to the file.
- The image command needs to be on a line by itself, as anything else on the line is ignored.
- The image is displayed using its existing size on the schedule. Simply drag the corner of the picture and the picture will resize as well as the picture in the note.
- You must 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

The schedule should look similar to this one (with a different graphic of your choice):



Symbol note, text and picture

More About Milestones Professional and Text.

- **Symbol Text or Symbol Notes** are the best way to annotate large schedules, especially if the text needs to "stick" to a task or symbol.
- **Default Symbol Text** is applied to symbols by double clicking a symbol in the toolbox and choosing the **Symbol Options** dialog box, **Default Text** tab. Each time the symbol is added to the schedule, the default text will also be added. Text attached to any symbol already on the schedule will not be affected by changes to the Default Text. That is, changes to the Default Text only affect symbols that are subsequently added not those already on the schedule.
- **Freeform Text** is most useful for blocks of text that are independent of any task or symbol. Freeform text will not move with a task row -- it is placed relative to the page. Ideal uses for freeform text are headers and footers.
- To have text stick to a task without displaying a symbol, consider using a **comment symbol**. A comment symbol can be a blank symbol or a very small symbol on a task row. The comment symbol is ignored when computing start date, end date and duration so it can be placed anywhere on the schedule. To create a comment symbol, just double-click any unused symbol in the toolbox and choose **Comment Symbol** under the **Symbol Shape** tab.
- To change the **Default Symbol Text** style and size first choose the **Format** tab. In the **Default Text** section, click **Symbol Text** and make changes.