

## Tutorials

### Lesson 4 – Customize the toolbox

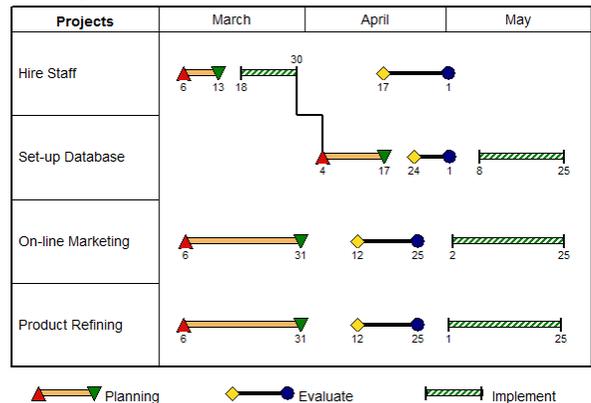
In this lesson you will learn how to:

- Unlock the toolbox from the sidebar.
- Change the appearance of a symbol in the toolbox.
- Change the appearance of a horizontal bar in the toolbox.
- Change the appearance of a vertical link in the toolbox.
- Switch between the combo and standard toolbox.
- Change the combo toolbox size and highlighting.
- Change the standard toolbox size and highlighting.

#### 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 4 Starter Schedule.mif**.
5. Save the lesson schedule to a folder on your computer (such as your **Documents** folder.) On the **File** tab, in the **Files and Templates: Open and Save Options** section, click ▼ (the down arrow) next to **Save As ...** Then, choose **Chart**. You will now be able to work with and save this lesson schedule.

#### Start-up

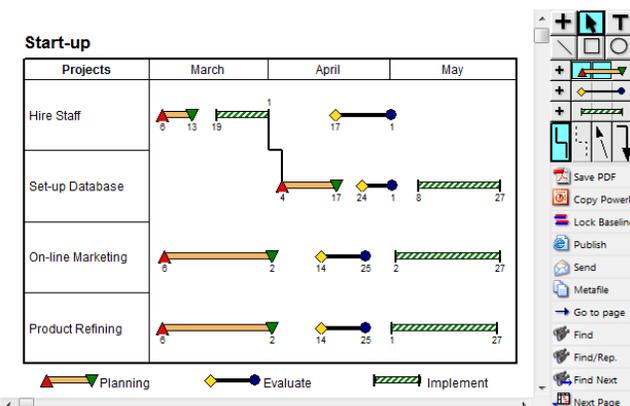


Lesson 4 starter schedule

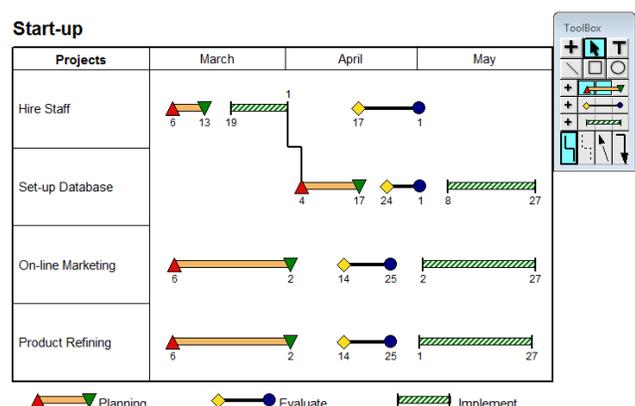
#### Unlock the toolbox from the sidebar

The sidebar is a toolbar anchored to the left or right side of the Milestones window. The sidebar contains the toolbox (which can be free-floating) and a user-defined list of shortcut buttons for a variety of activities, including moving from page to page, creating web pages, filtering, applying a color theme, creating a master schedule, and more.

1. Right-click anywhere on the toolbox and choose **Sidebar Options**.
2. In the **Sidebar Options** dialog box, choose **Do not show Sidebar**.
3. Close and open Milestones Professional. (Necessary for the change just made.)
4. The toolbox is now free standing, as shown below. Be sure to open the **Lesson 4 Starter Schedule** saved in step 5 above.



Docked toolbox in sidebar



Floating toolbox (can be moved anywhere in window)

Changes made in the **Sidebar Options** dialog box apply to all schedules.

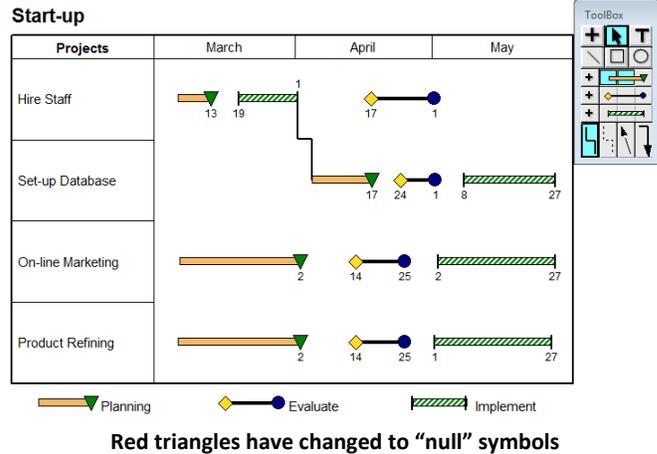
## Change the appearance of a symbol in the combo or standard toolbox

Any symbol in the toolbox can be customized. If a toolbox symbol is changed then if that symbol exists on the schedule, all symbols of that type on the schedule will change accordingly.

### Change the red triangle to a null (blank) symbol

1. Notice that each task row contains a red triangle symbol, and that the same symbol is in the toolbox. Additionally, the red triangle displays in the legend below the schedule.
2. In the toolbox, double-click on the red triangle symbol. The **Symbol Options** dialog box displays.
3. Under **Standard Shapes**, scroll and select the **28th** symbol (the null symbol).
4. Click the **Text and Date Properties** tab.
5. Under **Date Placement**, choose **Hide**.
6. Click **OK**.

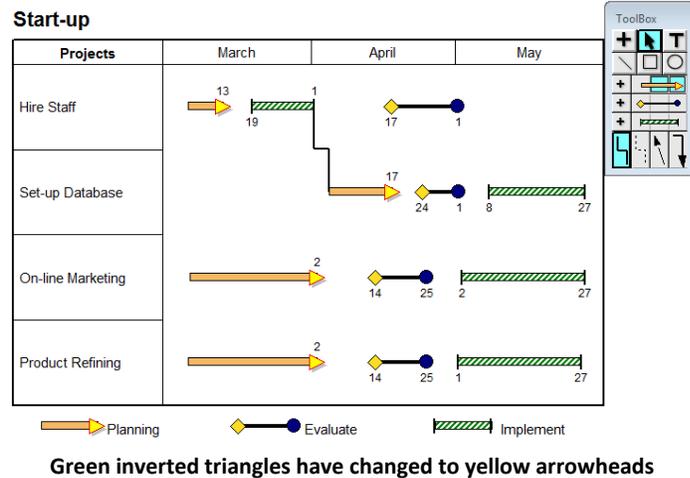
All red triangle symbols on the schedule have been changed to null (blank) symbols with no dates. The red triangle in the legend changed as well.



### Change the green inverted triangle to a yellow arrowhead

1. In the toolbox, double-click on the green upside down triangle symbol. The **Symbol Options** dialog box displays.
2. Under **Standard Shapes**, scroll and select the **43rd** symbol (arrowhead).
3. Click the **Color/Pattern/Size/Shadow** tab.
4. Under **Outline Color** click the color rectangle to open the color palette. Choose **red**.
5. Under **Fill Color** click the color rectangle to open the color palette. Choose **yellow**.
6. Under **Shadows (Filled Symbols Only)**  **Show Shadow on Symbol**.
7. Under **Shadows (Filled Symbols Only)** choose **Medium** for the **Size**.
8. For shadow **Color** click the color rectangle to open the color palette and then choose **silver**.
9. Click the **Text and Date Properties** tab.
10. Under **Date Placement**, choose **Above** then **Center**.
11. Click **OK**.
12. If a message about symbol placement displays, then select **Yes**.

All green upside down triangle symbols on the schedule have been changed to yellow arrowhead symbols with dates above the symbol. The green upside down triangle in the legend has also changed (to a yellow arrowhead).

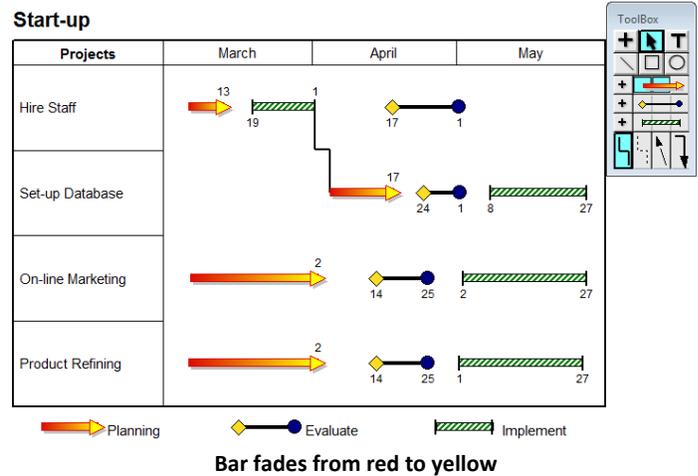


## Change a horizontal bar in the toolbox

As with symbols, when a bar in the toolbox is changed, and that bar already exists on the schedule, all bars of that type which are on the schedule change as well.

1. In the toolbox, double-click on the gold bar that is between the null symbol and the yellow arrowhead. The **Bar Options** box displays.
2. Keep the same **Bar Type**.
3. Under **Fill Color** click the color rectangle to open the color palette. Choose **red**.
4. Under **Line Color** click the color rectangle to open the color palette. Choose **red**.
5. Next to **Effects Target Color**: click the color rectangle to open the color palette. Choose **yellow** (the **Fill Color** fades into the **Target Color**).
6. For **Special Effects** choose ▼ (the down arrow) and choose **Fade to Right** (a Special Effect must be chosen for the Target Color to display.)
7. In the **Shadow Settings (Bars Only)** section  **Show Shadow**.
8. For **Shadow Size**, choose **Medium**.
9. Under **Shadow Color** click the color rectangle to open the color palette. Choose **Silver**.
10. Click **OK**.

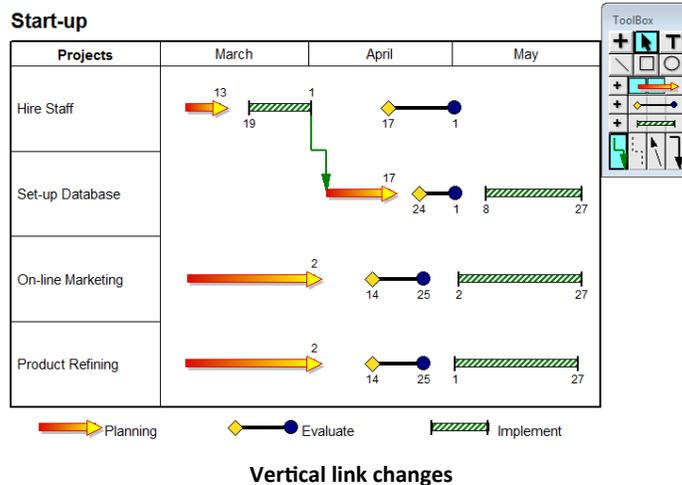
Now, the bar fades from red (fill color) to yellow (target color) moving from left to right. Notice the legend entry also reflects the bar changes.



## Change a vertical link in the toolbox

This schedule has just one vertical link. These are customized similarly to the symbols and the horizontal bars:

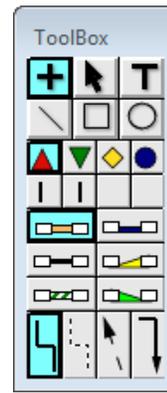
1. Double-click the first vertical link in the toolbox. This **Vertical Link Options** dialog box displays.
2. Under **Color** click the color rectangle to open the color palette. Choose **green**.
3. Under **Shape** click ▼ (the down arrow) and choose link 9.
4. In the **Arrowhead Size** section choose **Large**.
5. Click **OK**.



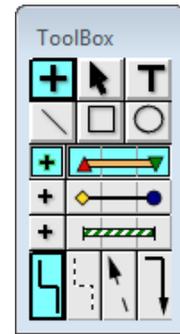
## Switch between the combo toolbox and the standard toolbox

The Combo Toolbox is being used for this lesson. To switch to the Standard Toolbox do the following:

1. Right click the **Toolbox**.
2. Choose **Switch to Standard Toolbox**.
3. The Standard Toolbox replaces the Combo Toolbox. Notice that the symbols and bars are the same; they are just separated into different sections.
4. Right click the **Toolbox**.
5. Choose **Switch to Combo Toolbox**. (Now, the combo toolbox is back.)



Standard Toolbox

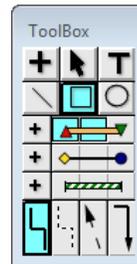


Combo Toolbox

## Change the combo toolbox size and highlighting

Here is a copy of the toolbox for this schedule. All of the major components of the toolbox are indicated:

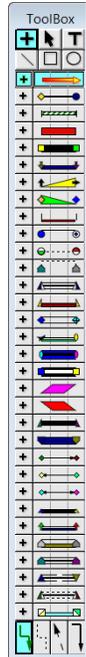
This toolbox has 3 sets of symbol, bar, symbol combinations, and 4 vertical links. You are going to change the number of symbols and bars in the toolbox then turn off the extra highlighting to the selected tools and symbols.



Combo Toolbox

1. This time, right-click the toolbox and choose **Toolbox Properties**. The **Customize Toolbox Size, Type, Highlight** dialog box displays.
2. Under **Combo Toolbox View Settings**, choose **32** for the number of **Rows** to display.
3. Under **Common Settings**, click off **Extra Highlighting for Selection** so that it is no longer .
4. Click **OK**.

Expanded combo toolbox



## Change the standard toolbox size and highlighting

Right-click the toolbox and choose **Switch to Standard Toolbox**. Here is a copy of the Standard Toolbox for this schedule. All of the major components of the toolbox are indicated:

The toolbox has 2 rows of symbols, 3 rows of horizontal bars and 1 row of vertical links. You are going to change the number of symbols, horizontal bars and vertical links.

1. Right-click the toolbox and choose **Toolbox Properties**. The **Customize Toolbox Size, Type, Highlight** dialog box displays.
2. Under **Standard Toolbox View Settings** choose **Symbols: 16**.
3. Under **Standard Toolbox View Settings** choose **Horizontal Bars: 16**.
4. Under **Common Settings**,  **Extra Highlighting for Selection**.
5. Under **Common Settings**, set the **Vertical Link Rows** to **2**.
6. Click **OK**.



Standard Toolbox

Expanded standard toolbox

