

Milestones PROFESSIONAL[®]

Tutorials

Lesson 4 – Customize the toolbox

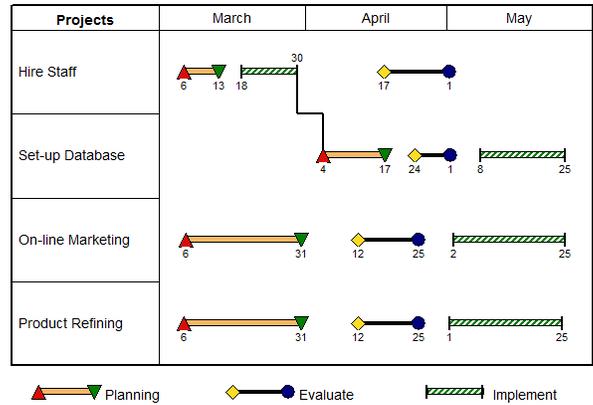
In this lesson you will learn how to:

- 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.
- Change the combo toolbox size and highlighting.
- Copy Toolbox to another schedule
- Copy toolbox row

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 ▼ next to **Open**.
3. Choose **Lesson Chart**.
4. Select **Lesson 4 Starter Schedule.mlg**.
5. Choose **File**. In the **Files and Templates: Open and Save Options** section, click the click the ▼ next to **Save As ...** Then, choose **Chart**. Save the schedule to a folder on your computer, such as the **Documents** folder. You will now be able to work with and save this lesson schedule.

Start-up



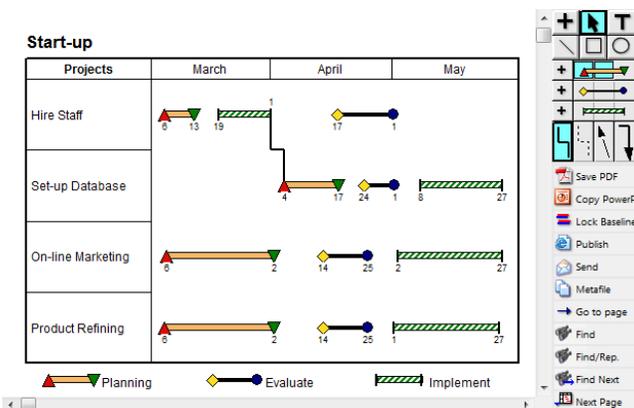
Lesson 4 Starter Schedule

Unlock the toolbox from the sidebar

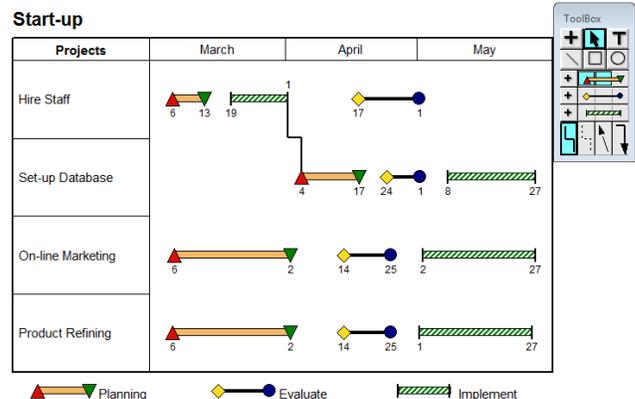
The sidebar is a toolbar anchored to the left or right side of the Milestones window. The sidebar contains the toolbox (which can be free-floating) and a user-defined list of shortcut buttons for a variety of activities, including moving from page to page, creating web pages, filtering, applying a color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

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



Docked Toolbox in Sidebar



Floating Toolbox (can be moved anywhere in window)

Milestones has two toolbox views the Standard (recommended) and Legacy toolbox. To switch to the Legacy toolbox choose **Tools | Program Options | Edit** check on **Use Legacy Toolbox**. To switch back to the Standard toolbox right click the toolbox and choose **Switch to Standard Toolbox**.

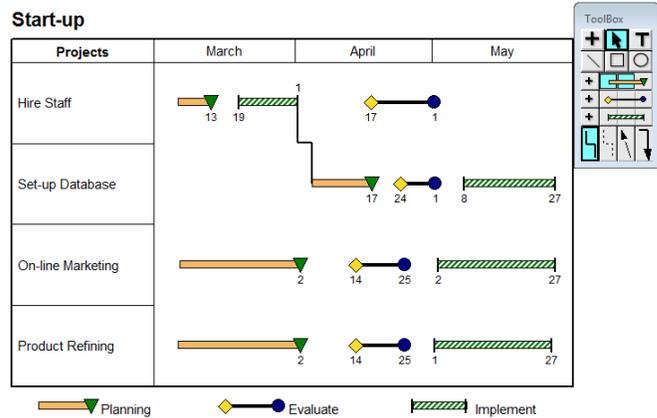
Change the appearance of a symbol in the toolbox

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

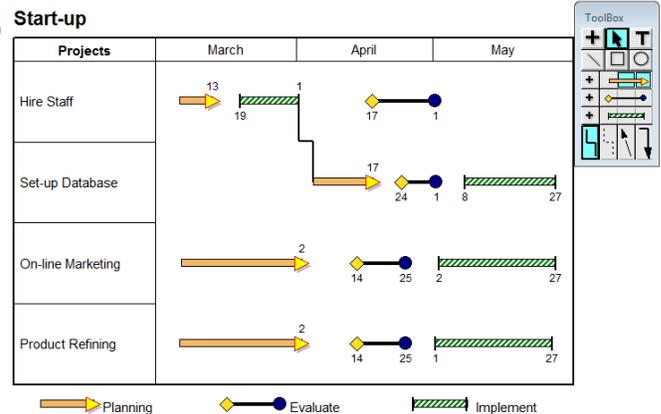
That was easy! The red triangle symbols on the schedule have changed to null (blank) symbols with no dates. The red triangle in the legend changed as well.



Red Triangles have Changed to “Null” Symbols

Change the green inverted triangle to a yellow arrowhead

1. In the toolbox, double-click on the **▼ (green down triangle)**. The **Symbol Options** dialog box displays.
2. Under **Standard Shapes**, select **▶ (symbol # 43)**.
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)** check on **Show Shadow on Symbol**.
7. Under **Shadows (Filled Symbols Only)** for **Size** choose **Medium**.
8. For shadow **Color** click the color rectangle to open the color palette and then choose **silver**.
9. Click the **Text/Date Properties** tab.
10. Under **Date Placement**, choose **Above** then **Center**.
11. Click **OK**.



Green Triangles have Changed to Yellow Arrowheads

When making global changes to a symbol in the toolbox if any instance of that symbol on the schedule has individual overrides the **Select Items to change** dialog box displays. Uncheck the items to keep the individual overrides. Checked items will revert back to the toolbox default.

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.

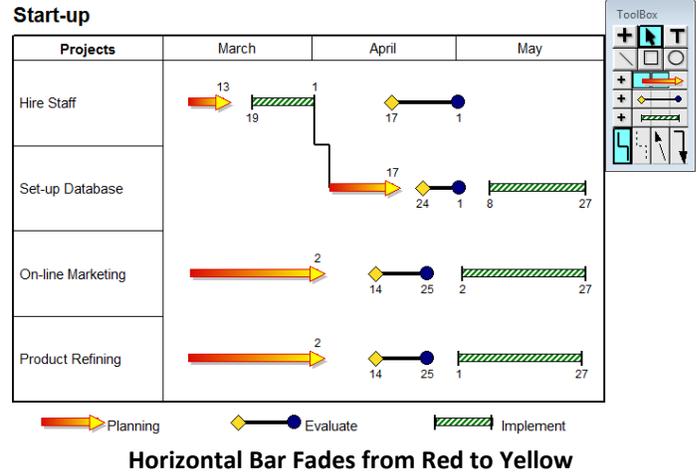
When in the **Symbol Options** dialog note the other changes that can be made to the symbol by selecting the following tabs.

- **Symbol Shape:** Choose from over 100 different Standard Shapes. Change the symbol type Normal, Comment, Status Symbol or Baseline Symbol. Add a User Defined Shape or bitmap as a symbol. Mark the symbol with a letter.
- **Color/Pattern /Size /Shadow:** Choose Line Patterns, Fill Patterns or Markings. Choose Outline, Fill, Mark , and After Status color. Choose a different After Status Shape. Specify symbol’s Text Color. Add a Shadow pick its Color.
- **Text /Date Properties:** Define position of symbol text and date. Give the text a background, color, border and shadow. Position the symbol Marking Letter. Choose symbols task row vertical position. Format a custom date for the symbol.
- **Default Text** tab: Add text that will display each time the symbol is added to the schedule.
- **ValueSet Default** tab: Assign to a Symbol ValueSet a value that will be added to the ValueSet each time the symbol is added to the schedule.

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 **Before Status 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** (before status), click the color rectangle to open the color palette. Choose **yellow**
6. For **Special Effects**, from the list choose **Fade to Right**.
7. In the **Shadow Settings (Bars Only)** section, check on **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.

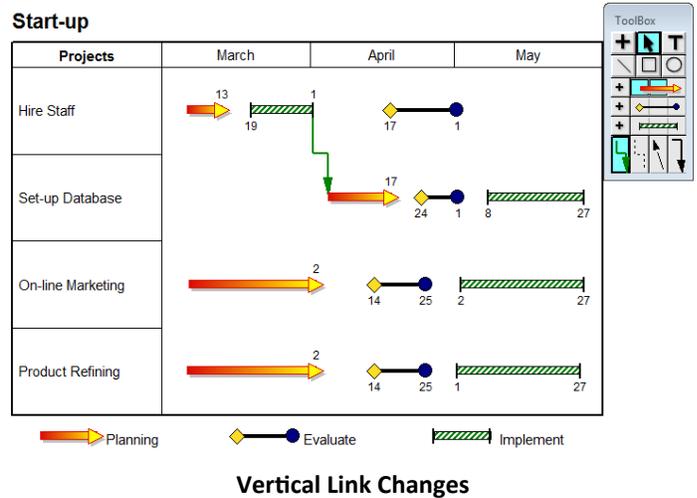
Horizontal bars can also have after status color when the Bars Fill to Status feature is turned on. Under Sample Bar: select **Bars**: text box to turn on or off **Bars Fill to Status** . The Sample Bar reflects the selection. Horizontal bars with a yellow highlighted number ignore fill to status. Horizontal bars with arrowheads can have the arrow heads as Small, Normal or Large.

Change a vertical link in the toolbox

This schedule has just one vertical link. Vertical links 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. For **Shape** choose link #9.
4. In the **Arrowhead Size** section choose **Large**.
5. Click **OK**.

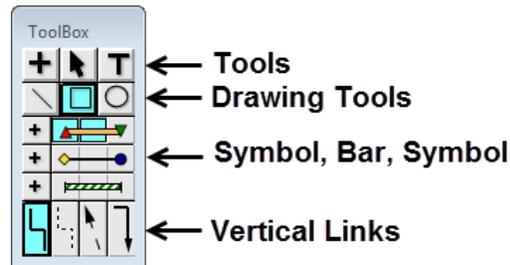
Vertical links that expand multiple pages can be drawn in on those pages by selecting **Draw lines for page spanning Vertical Connections**. Helpful connection bubbles containing the symbol number along with a connection direction arrow or just connection direction arrows can be turned on for vertical links that expand pages.



Change the combo toolbox size and highlighting

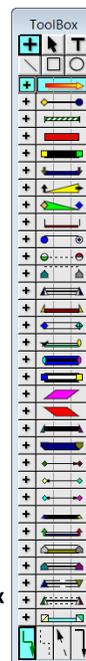
Here is a copy of the toolbox for this schedule. All of the major components of the toolbox are indicated:

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.



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**.
4. Click **OK**.

Expanded combo toolbox



For Future reference: Copy a toolbox to paste into another schedule

When two schedules are open in the same "instance" of Milestones, the user can copy one schedule's toolbox and then paste it in another schedule. Thus, the new toolbox replaces the old toolbox. All existing symbols on the schedule are replaced by the symbols in the new toolbox.

1. Open both schedules in the same instance of Milestones (a single Milestones window with two files open).
2. Right-click anywhere on the toolbox
3. Choose **Copy Toolbox**.
4. Choose **View | Window Controls | Switch Window** menu and select the other schedule.
5. Right-click that schedule's toolbox and choose **Paste Toolbox**.

- Each time an independent Milestones window is opened, it is called an "instance." Users can have multiple instances of Milestones open at a time. Tell how many instances of Milestones are currently open by clicking the Milestones icon on the Windows Taskbar.
- To copy and paste between two schedules, the operation must take place within the same instance of Milestones. When two schedules are open in the same instance of Milestones, it's possible to copy and paste the toolbox from one schedule to the other.

For Future reference: Copy a toolbox row within the same schedule:

1. Click the small plus next to the row to be copied. This will select the row.
2. Right-click the selected row and choose **Copy Selected Row**.
3. Click the small plus next to the row to be changed.
4. Right-click the selected row and choose **Paste Copied Row over Selected**.

For Future reference: Copy a toolbox row from one schedule to another:

1. Open both schedules in the same instance of Milestones (a single Milestones window with two files open).
2. Click the small plus next to the row to be copied. This will select the row.
3. Right-click the selected row and choose **Copy Selected Row**.
4. Choose **View | Window Controls | Switch Window** menu and select the other schedule.
5. Click the small plus next to the row to be changed.
6. Right-click the selected row and choose **Paste Copied Row over Selected**.