

Milestones PROFESSIONAL[®] TUTORIALS

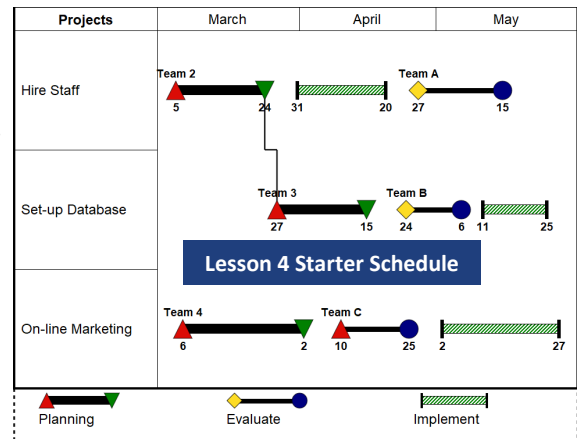
Lesson 4 – Customize the ToolBox

In this lesson you will learn how to:

- Change the Toolbox to Sidebar or Floating
- Change the combo ToolBox size and highlighting.
- Change the appearance of symbols
- Change the appearance of a horizontal bar
- Change the appearance of a vertical link
- Copy a ToolBox to another schedule
- Copy a ToolBox row

Open the schedule for this lesson

1. On the toolbar, choose **File**.
2. In the **Files and Templates: Open and Save Options** section select **Open Samples or Lessons**. The **Open a Sample Chart** dialog displays.
3. Under **Select a Folder below to Open**, select **Lessons**. The Lesson schedules will display in the window to the right.
4. Pick **Lesson 04 Starter Schedule.mlj**.
5. Save the schedule to an accessible folder on your computer. Choose the **File** tab. In the **Files and Templates: Open and Save Options** section, choose **Save As....** In the menu that displays choose **Chart**. Name, then save the schedule.



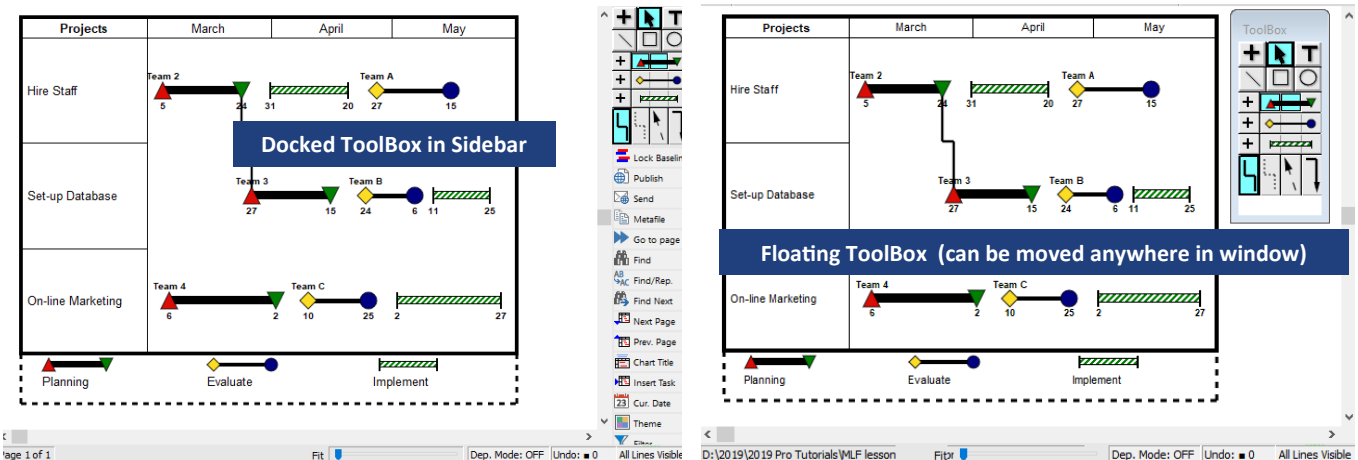
Change the ToolBox to Sidebar or Floating

The sidebar displays the toolbox and shortcut buttons anchored to the left or right side of the Milestones window. The floating ToolBox can be moved around on the Milestones Window. It does not contain shortcuts.

Visible shortcuts in the sidebar depend on the size of the ToolBox (number of rows set), the size of the computer's screen and the maximization of the Milestones window.

To access the sidebar options or select the floating ToolBox, right-click anywhere on the ToolBox, choose **Sidebar Options**.

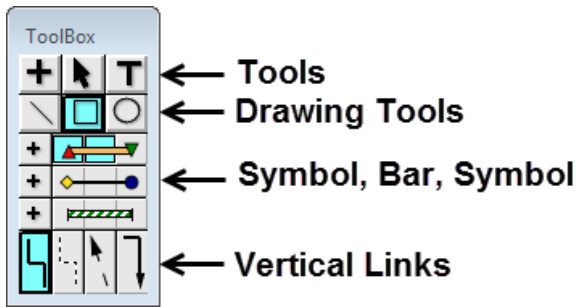
Milestones Professional needs to be restarted when the Sidebar's location and Floating toolbox settings are changed. Changes made in the **Sidebar Options** dialog box apply to all schedules.



There are two ToolBox views, the Standard (recommended) and Legacy ToolBox. To switch to the Legacy ToolBox choose **Tools | Program Options | Edit | Use Legacy ToolBox**. To switch back to the Standard ToolBox right click the ToolBox and choose **Standard ToolBox**.

Change the Standard ToolBox size and highlighting

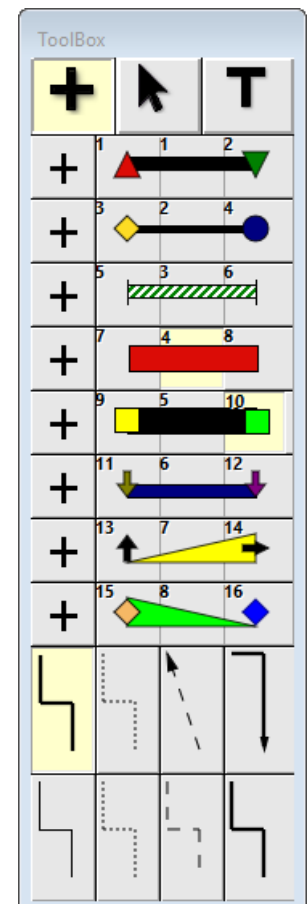
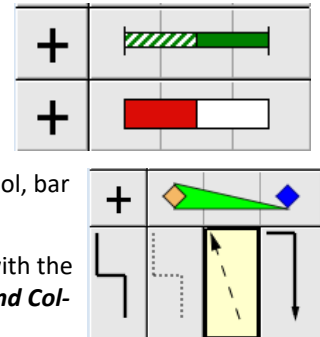
Here is a copy of the ToolBox for this schedule. All of the major components of the ToolBox are indicated:



To see how to change the look of the ToolBox, right-click the ToolBox and choose **ToolBox Properties**. The **Customize ToolBox Size, Type, Highlight** dialog box displays.

Under **ToolBox View Settings**:

- **Open File with Arrow Tool Active** is a default setting that helps to prevent unintended changes to a schedule when it is first opened.
- Under **Rows**, select between **1** and **32** rows of Symbol, Bar Symbol combinations to display in the ToolBox. You will learn how to do this in subsequent pages of this tutorial.
- Horizontal bars in Milestones can show status by coloring the bar in two different colors. By selecting In **Bars, show both before and after status colors** the bars in the ToolBox will show two colors. IMPORTANT the feature **Bars: Fill to Status Date** needs to be checked on. (Go to **Dates | Dates Related Setting | Bars Fill to Status Date.**)
- **Extra Highlighting for Selection (black border)** helps give a better view of which tool, symbol, bar and vertical link is active.
- Milestones also highlights the background of the active tool, symbol, bar and vertical link with the color aqua, by default. You can pick the background color by first selecting show **Background Color for Current Selection** then the **Color**.
- To decrease the size of the ToolBox the Drawing Tools row can be hidden by unchecking **Show Line, Box, and Circle Tools**.
- Next to **Vertical Link Rows** select between **0** and **2** rows to display.
- **Double the ToolBox display size** is helpful for high resolution monitors. When this option is selected Milestones needs to be closed, then opened for the ToolBox change to take affect.
- Right click the ToolBox, select **Show Symbol and Bar Numbers in ToolBox**. This option is helpful for importing and automation.
- Right click the ToolBox to **Hide ToolBox**. To show the ToolBox check on **ToolBox** by going to **View | Optional Items**.



Change the appearance of symbols 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.

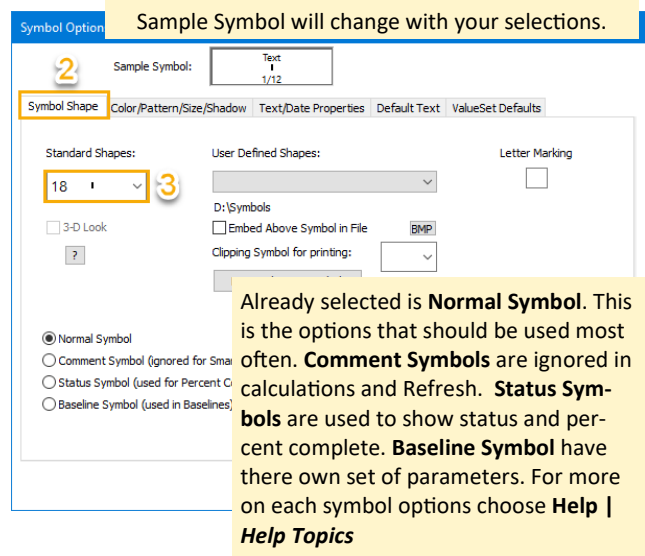
Change the red triangle's shape

Notice a red triangle symbol is in the ToolBox, each task row contains a red triangle symbol and the red triangle symbol is in the schedule's legend. Changing attributes of the red triangle in the ToolBox will affect all instances of that symbol on the schedule and in the legend.

1. In the ToolBox, double-click on the **red triangle symbol**. The **Symbol Options** dialog box displays.
2. Select the **Symbol Shape** tab.
3. **Standard Shapes**, scroll and select **18**, small vertical dash.

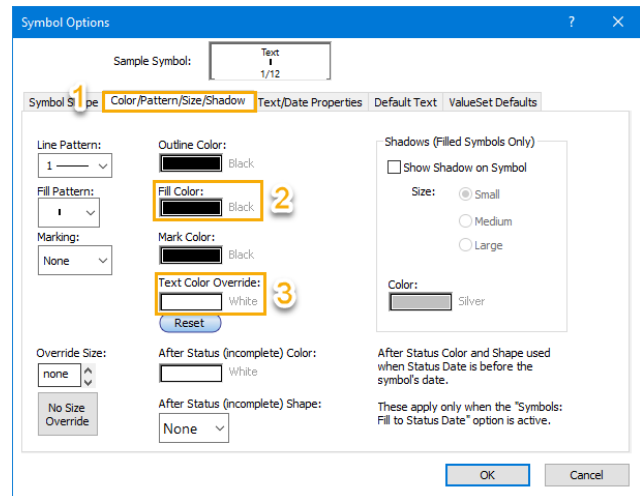
In order to have horizontal bars or vertical links on a schedule there must always be symbols to place the bar and vertical link between. To have the look of just a bar you can use the above chosen symbol or use Standard Shapes: 28 (invisible symbol) at either end of the horizontal bar.

4. Stay in the dialog box.



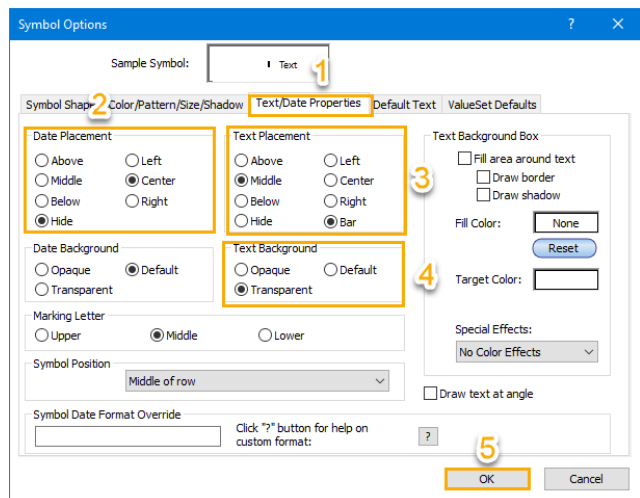
Change the symbol's color and text for this symbol's color

1. Click the **Color/Pattern/Size/Shadow** tab.
2. Change **Fill Color** to **Black**.
3. Change **Text Color Override** to **White**.
4. Stay in the dialog box.

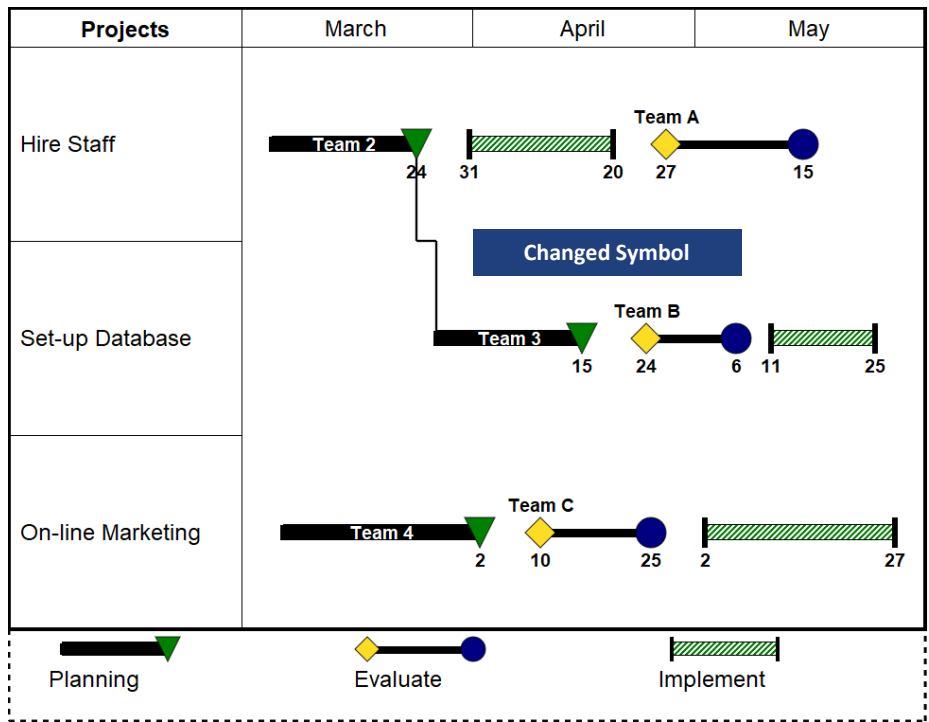


Change the Text Background and Placement and Date Placement

1. Click the **Text/Date Properties** tab.
2. Under **Date Placement**, choose **Hide**.
3. Under **Text Placement**, choose **Middle** and **Bar**.
4. Under **Text Background**, choose **Transparent**.
5. Choose **OK**.
6. Because symbols are currently on the schedule the **Select Items to Change** dialog will display. Leave all items checked as there are no current individual overrides for any of the red triangles on the schedule and you want all the changes to be applied to each red triangle on the schedule. (Uncheck the items to keep individual overrides.) Choose **OK**. See the results on the next page.

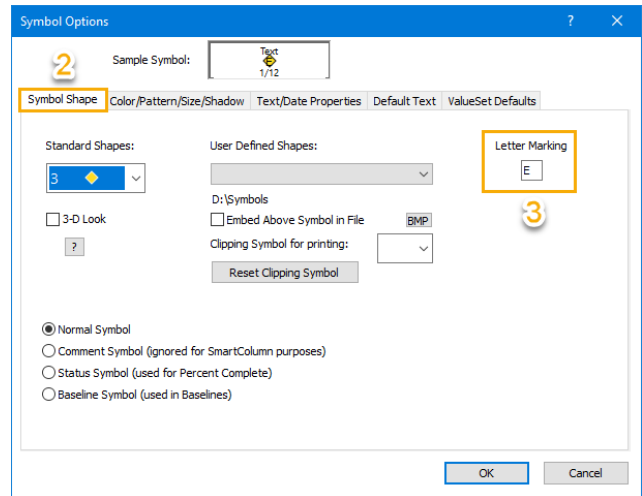


- All red triangles on the schedule and in the legend have changed to a black vertical bar.
- The date is no longer showing on the black vertical bar.
- The black vertical bar's text is now centered on the bar.
- Now, only the black vertical bar's text is white.



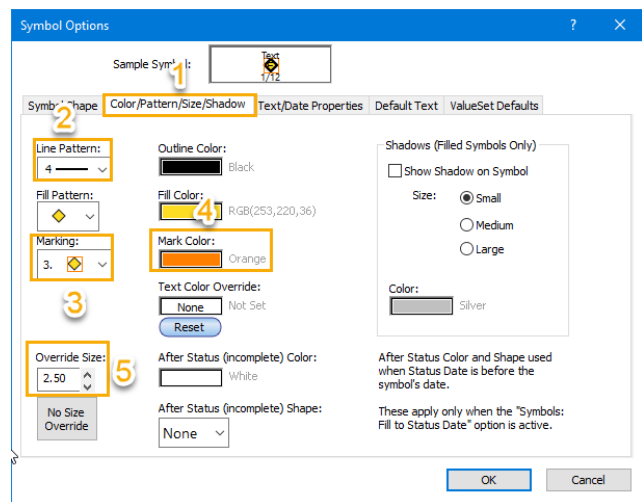
Add a letter marking to the yellow diamond

1. In the ToolBox, double-click on the **yellow diamond symbol**. The **Symbol Options** dialog box displays.
2. Select the **Symbol Shape** tab.
3. For **Letter Marking** enter an **uppercase E**.
4. Stay in the dialog box.



Change the line pattern, marking, marking color and size of the yellow diamond

1. Click the **Color/Pattern/Size/Shadow** tab.
2. Change **Line Pattern** to **4**.
3. Change **Marking** to **3**.
4. Change **Mark Color** to **Orange**.
5. Change **Override Size** to **2.5**.
6. Stay in the dialog box.

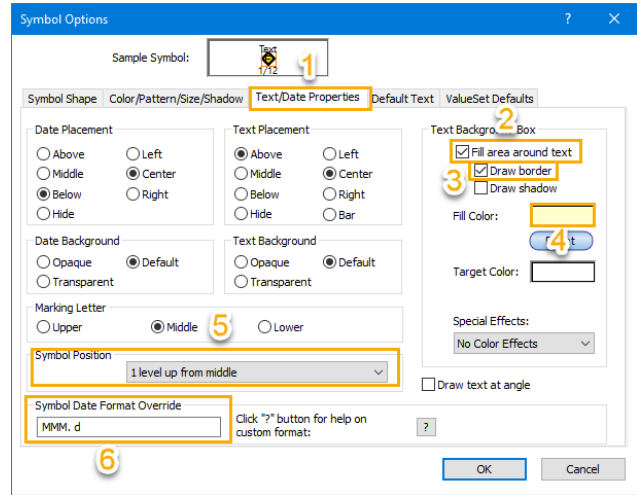


Change date format, text format and vertical position of the yellow diamond.

1. Click the **Text/Date Properties** tab.
2. Under **Text Background Box** check on **Fill area around text**.
3. Under **Text Background Box** check on **Draw Border**.
4. Under **Text Background Box** for **Fill Color** choose **Light Yellow**.
5. Change **Symbol Position** to **1 level up from middle**.
6. For **Symbol Date Format Override** type in **MMM. d**.

To see how to set other custom date formats choose the **? Question Mark** icon.

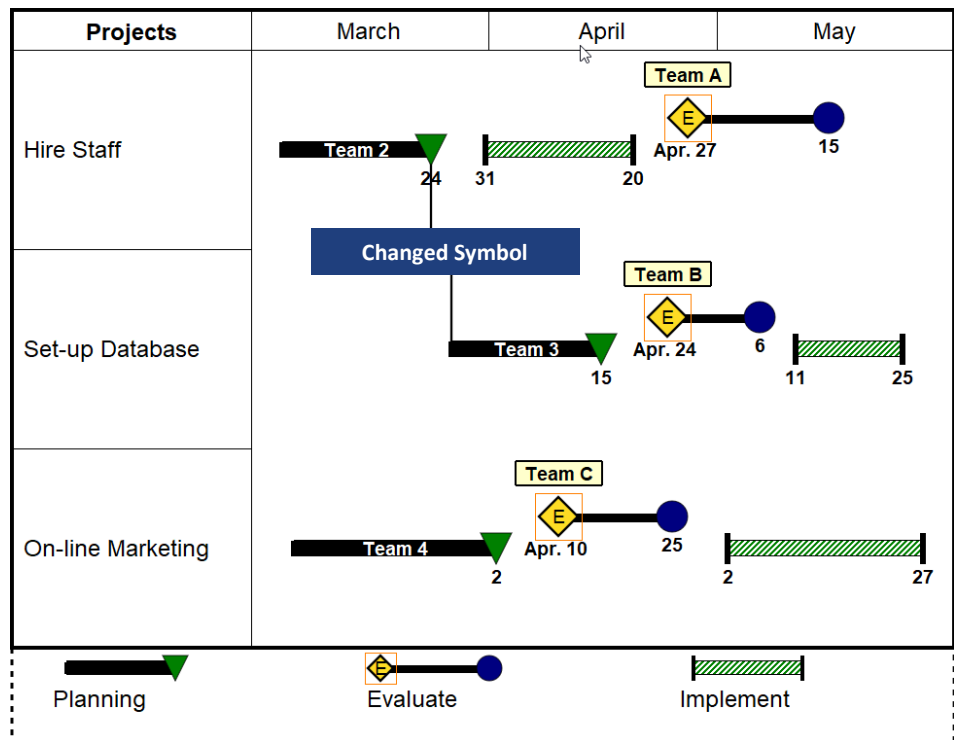
7. Choose **OK**.
8. Double click on **the blue circle symbol** in the ToolBox. Follow steps **1** and **5** above to change its Symbol Position.



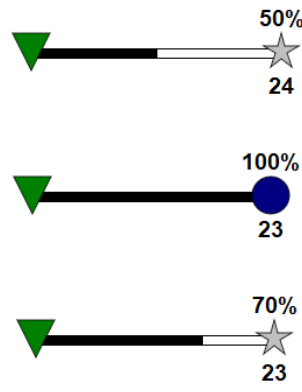
Here is the resulting schedule.

The yellow diamonds now have :

- An E in their center.
- They are marked with an orange box around them.
- Their text has been highlighted with a frame and color.
- Their date has a different format based on the code entered.



Select the **Color/Pattern/Size/Shadow** tab, in the **Symbol Options** dialog so symbols can have an after status color and /or an after status symbol. **Symbol: Fill to Status** needs to be checked on for these options to display. **Dates | Date Related Settings | Symbol: Fill to Status**



Any bitmap can be used as a Milestones symbol. Bitmap symbols must reside in the folder which contains all user-defined symbols. To add a bitmap symbol select the **Symbol Shape** tab, in the **Symbol Options** dialog. Learn more [Help | Help Topics | Bitmap](#).



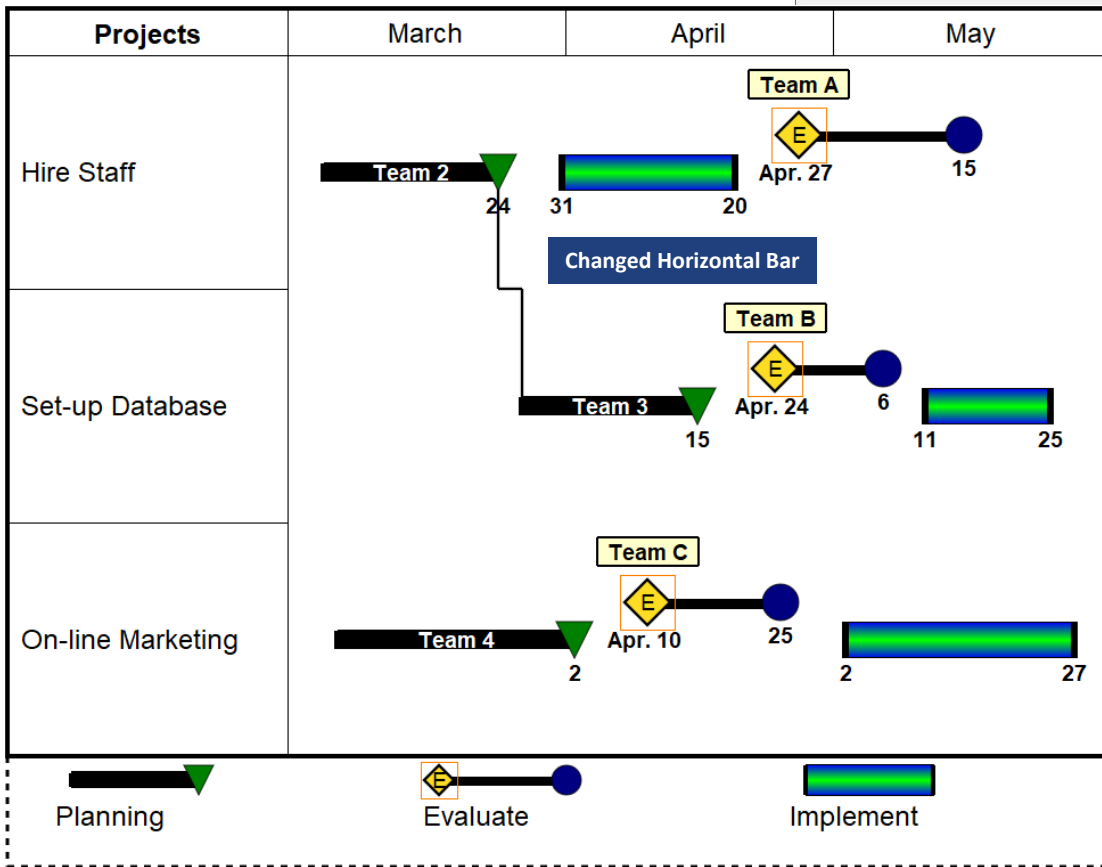
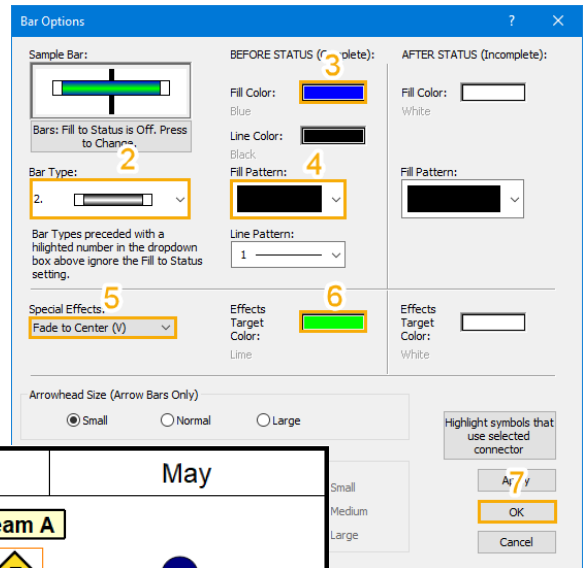
When in the **Symbol Options** dialog note the other tabs containing the following options.

- **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.

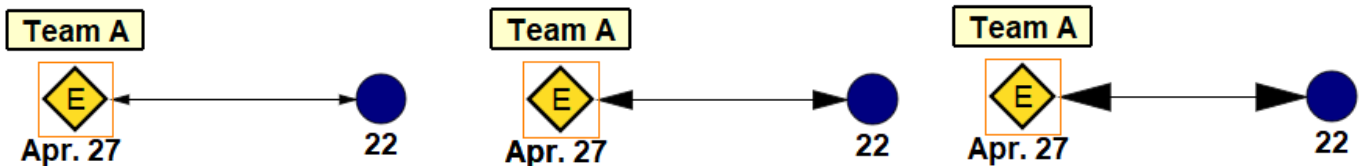
Change a horizontal bar in the ToolBox

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.

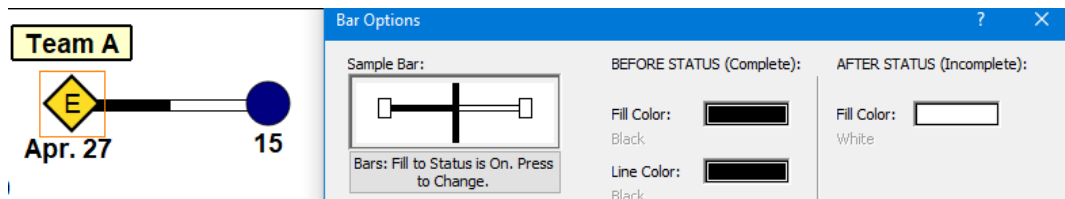
1. In the ToolBox, double-click on the green stiped horizontal bar. The **Bar Options** box displays.
2. Change **Bar Type** to **2**, wide bar.
3. Change **Fill Color** to **Blue**.
4. For **Fill Pattern**, scroll to the top most pattern **Solid**, select it.
5. For **Special Effects** scroll and choose **Fade to Center (V)**.
6. For **Effects Target Color** choose **Lime**.
7. Click **OK**.



Horizontal bars with arrowheads can have the arrow heads as **Small**, **Normal** or **Large**.



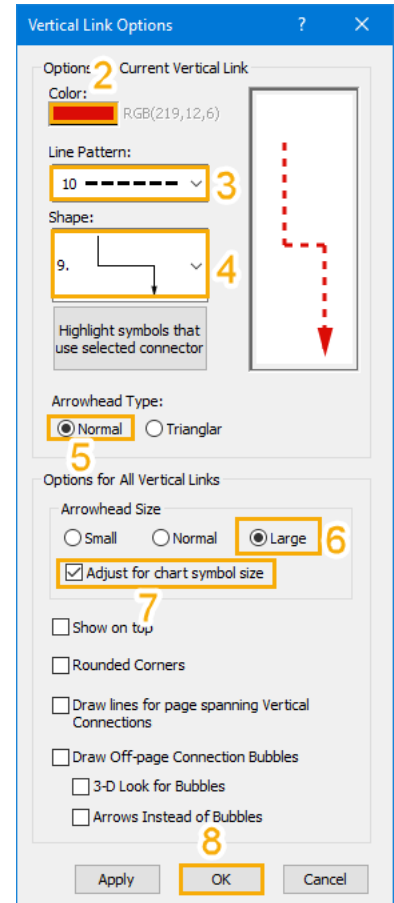
Horizontal bars can have an after status color. Under **Sample Bar:** select **Bars: Fill to Status is On. Press to Change**. The Sample Bar reflects the selection. Horizontal bars type's numbers highlighted yellow ignore fill to status.



Change a vertical link in the ToolBox

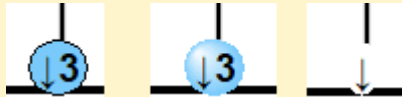
This schedule has just one vertical link. These are customized similarly to the symbols and the horizontal bars:

1. Double-click the **first vertical link**, in the ToolBox. This **Vertical Link Options** dialog box displays.
2. Change **Color** to **Red**.
3. Change **Line Pattern** to **10**, dashed line.
4. Change **Shape** to **9**, right jog with arrow head.
5. For **Arrowhead Type** choose **Normal**.
6. For **Arrowhead Size** choose **Large**. Global setting for all vertical links.
7. Check on **Adjust for chart symbol size**. Global setting for all vertical links.
8. Click **OK**.

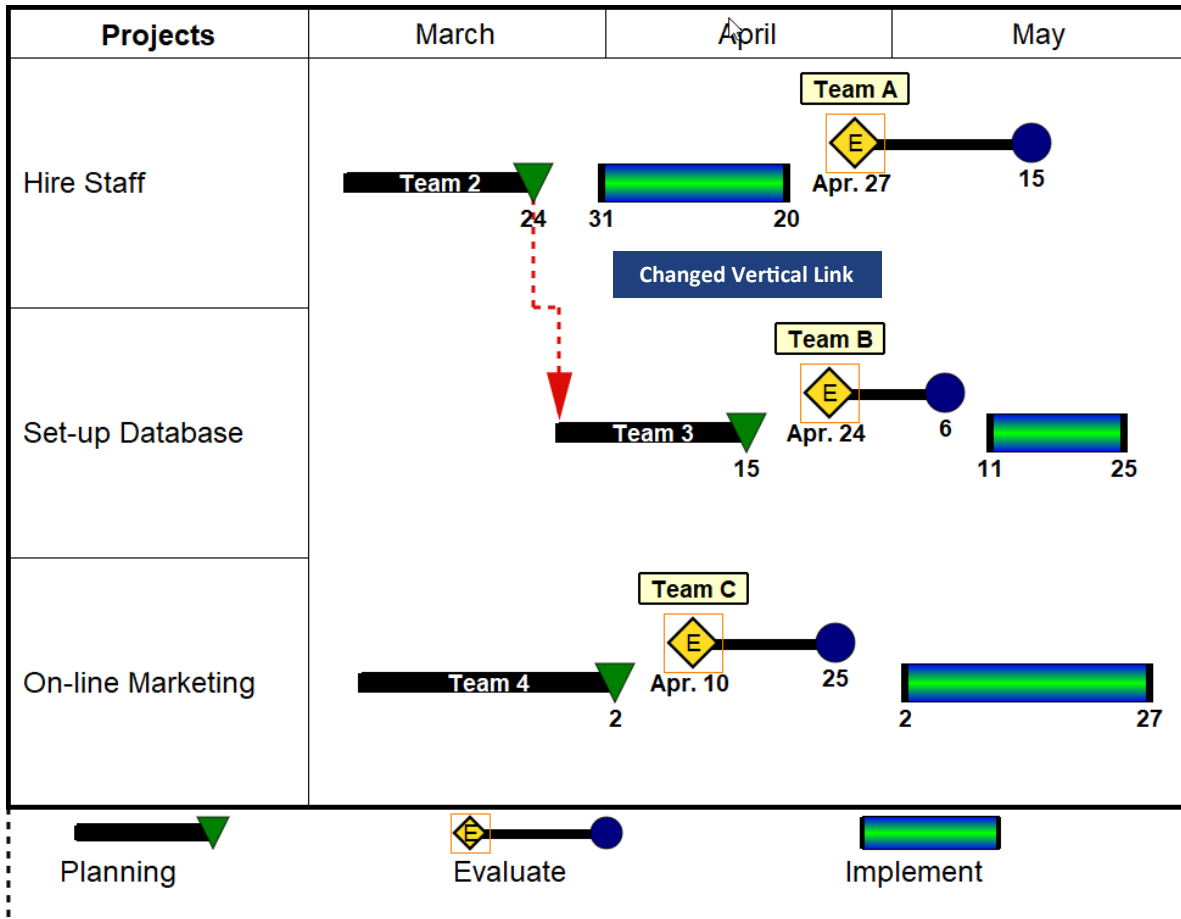


More Vertical links options. These are global setting for all vertical links.

- Vertical links can be **Shown on top** over symbols and horizontal bars.
- Vertical links can have **Rounded Corners**.
- Vertical links can span multiple pages and can be drawn across those pages by selecting **Draw lines for page spanning Vertical Connections**.
- Vertical links can have helpful connection bubbles, select **Draw Off-page Connection Bubbles**.



- Bubbles can be plain or 3-D (select **3-D Look for Bubbles**), are drawn at the bottom and top of a page, and contain the connections task row number along the connections direction represented by an arrow.
- Instead of a bubble the Vertical links can just have a connection direction arrow, select **Arrow Instead of Bubbles**.



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**.
-

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 viewing 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 and a ToolBox row from one schedule to the other. Choose **File | Open** to brows to the files to share a ToolBox or ToolBox row.

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 the other schedule. Thus, the new ToolBox replaces the old ToolBox. All existing symbols, horizontal bar and vertical links 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**.
-

Copy a ToolBox row from one schedule to another:

When two schedules are open in the same "instance" of Milestones, the user can copy one schedule's ToolBox row and then paste it in the other schedule. If symbols, and horizontal bar from the original row are on the schedule they will be replaced by the new rows symbols and horizontal bar.

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**.