Milestones PROFESSIONAL® TUTORIALS

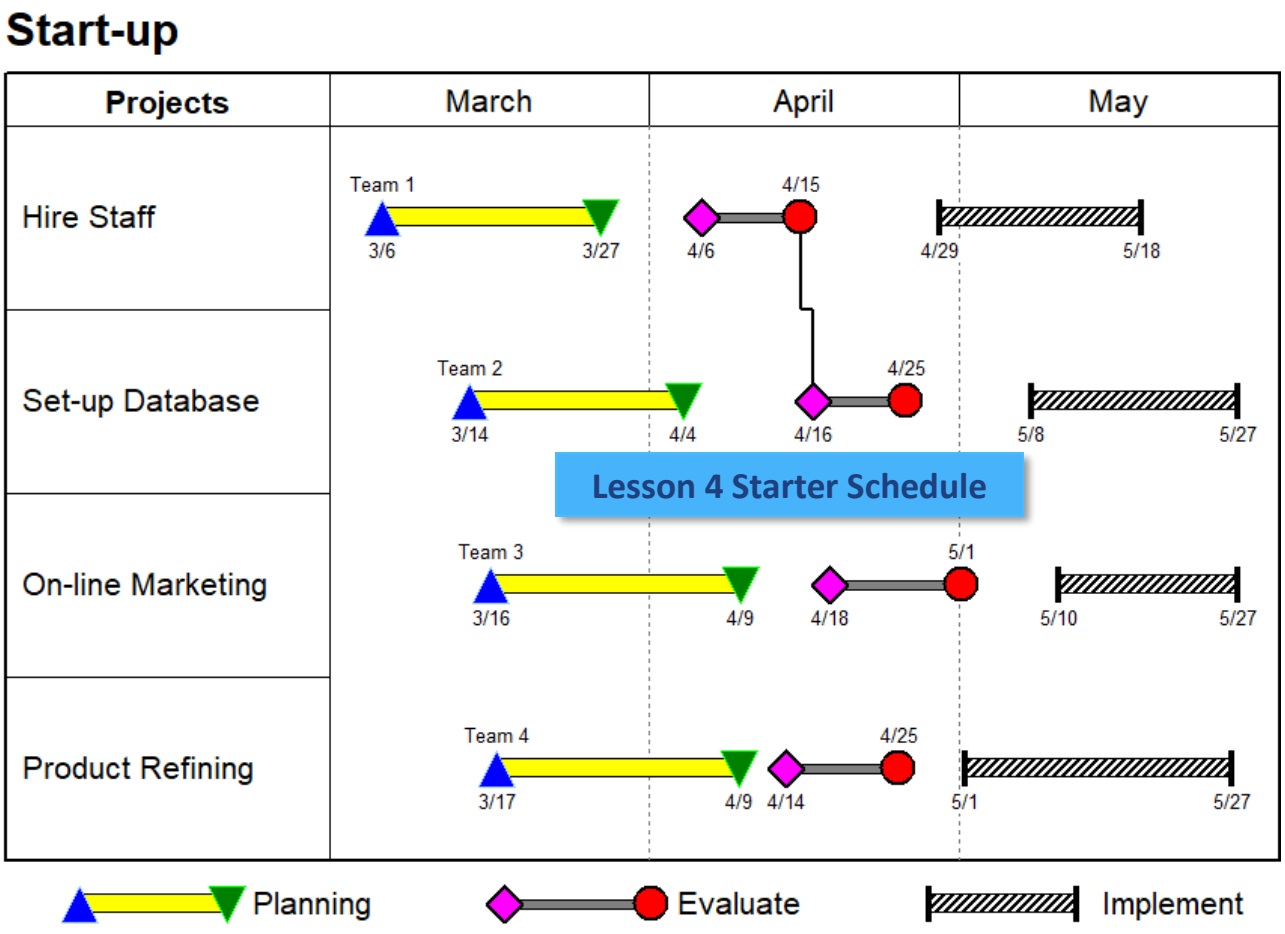
Lesson 4
Customize the ToolBox

In this lesson you will learn how to:

- Change the toolbox to a sidebar or floating toolbox
- Change the toolbox size and highlighting.
- Change the appearance of symbols in the toolbox
- Change the appearance of horizontal bars in the toolbox
- Change the appearance of vertical links in the toolbox
- Copy a toolbox row within the same schedule
- Copy a toolbox to another schedule
- Copy a toolbox row to another schedule

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* and pick *Lesson 04 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*…. In the menu that displays choose *Chart*. Name, and then save the schedule.



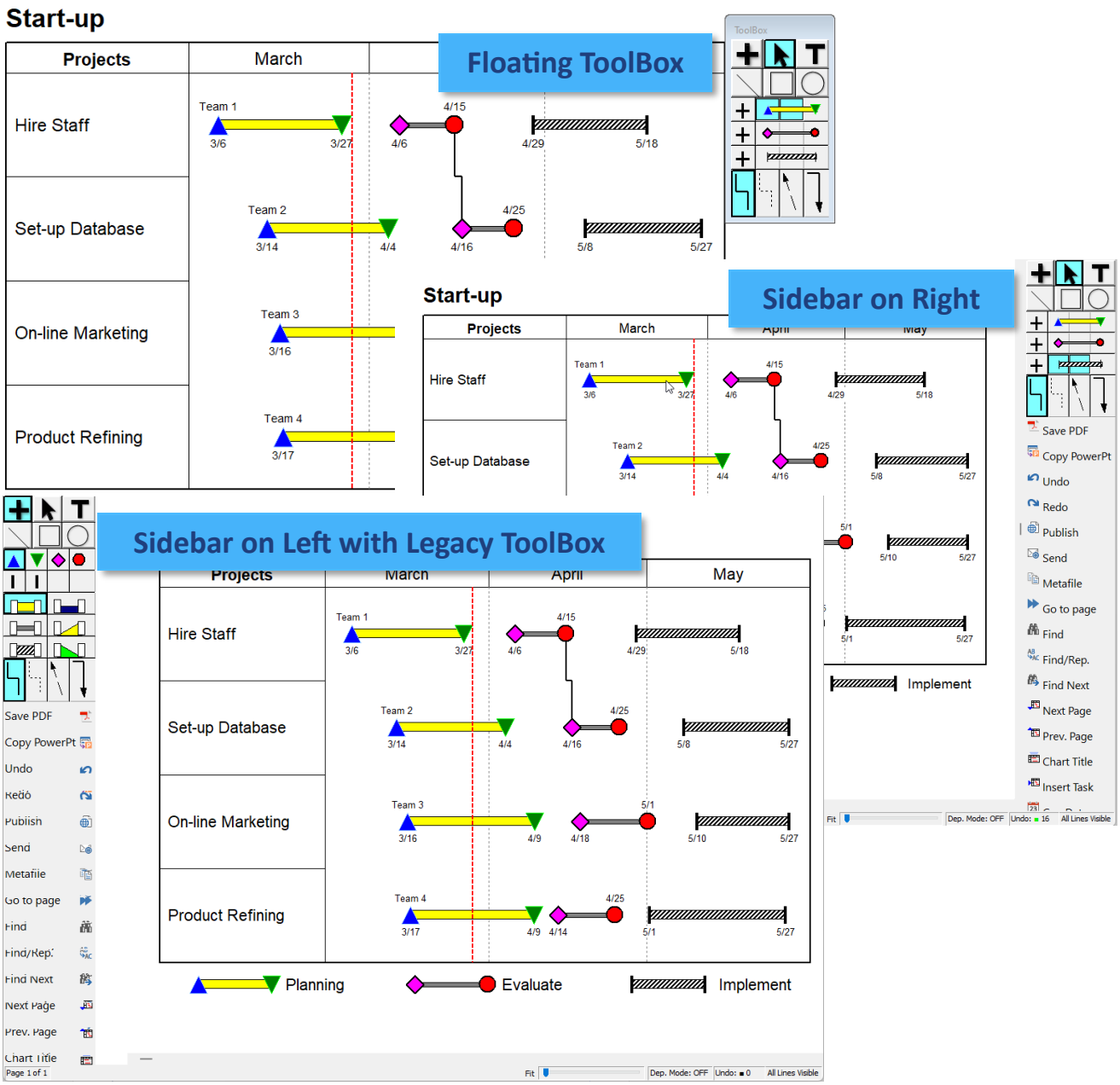
Change the toolbox to sidebar or floating

The sidebar displays the toolbox and shortcut buttons like Undo, Redo, Save PDF etc.. The Sidebar can be anchored to the left or right side of the Milestones window.

The number of visible shortcuts in the sidebar depends on the size of the toolbox (number of rows set), the size of the computer's screen and the maximization of the Milestones window.

The floating toolbox can be moved around on the Milestones Window. It does not contain shortcuts.

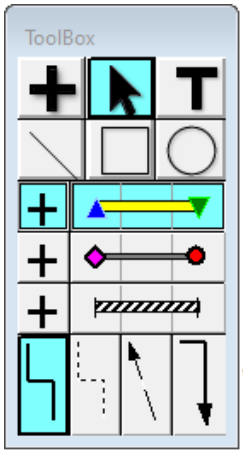
To access the sidebar options or change to the floating toolbox, right-click anywhere *on the toolbox*, and choose *Sidebar Options*. The sidebar can be hidden, or positioned to the left or right of the schedule. Milestones Professional needs to be restarted when the sidebar's location and floating toolbox settings are changed. Changes made in the Sidebar Options dialog box apply to all schedules.



There are 2 toolbox views, the Standard (recommended) and legacy toolbox. To switch between the toolbox views, *right-click the toolbox* to choose *Switch to…*

Change the ToolBox style, size and highlighting

Major components of the **toolbox**:



Tools

Drawing Tools

Symbol-Horizontal Bar-Symbol Combinaitons

Vertical Links

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

Under Toolbox View Settings:

- Symbol, Bar, Symbol Combinations select between *1* and *32* rows of Symbol, Bar, Symbol Combinations to display in the ToolBox.
- *Open File with Arrow Tool Active* is a default setting that helps to prevent unintended changes to a schedule when it is first opened.
- 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 Turn on ☑*Bars: Fill to Status Date* (Dates |Dates Related Settings)
- ☑*Extra Highlighting for Selection (Black Border)* to more easily see which tool, symbol, bar and vertical link is active.
- Milestones also highlights the background of the active tool, symbol, horizontal bar and vertical link with the color aqua, by default. Pick the background color by first selecting *Show Background Color for Current Selection* and then *pick 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.

Under Global Settings:

- It might be useful to adjust the Toolbox Scale, especially for high res monitors. Choose *100%, 150% or 200%* view. Milestones Professional needs to be closed and re-opened for the toolbox size to change.
- ☑*Show Symbol and Bar Numbers* to show how the symbols and bars in the toolbox are numbered. This is useful for using Milestones Professional's automation interface.
- The toolbox can be easily hidden and un-hidden. To hide, right-click the toolbox and choose *Hide ToolBox*. To show the toolbox again, right click anywhere outside the schedule and pick *Toggle ToolBox display*.

Change the appearance of symbols in the ToolBox

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

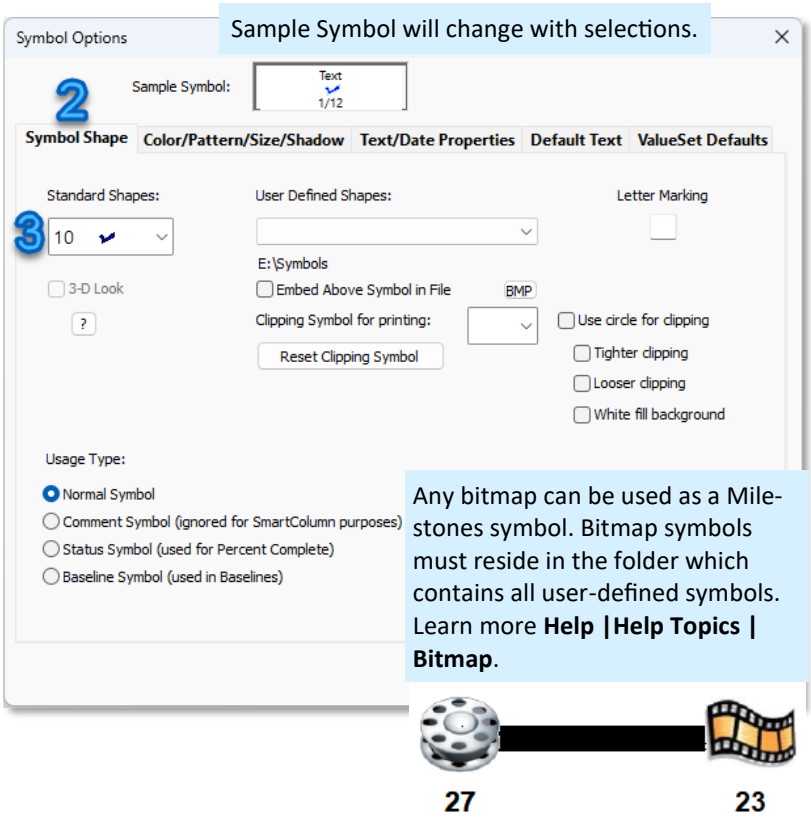
Change the blue triangle's shape

In the schedule there is a blue triangle symbol in the toolbox. It is also in each task row and the schedule's legend. Changing attributes of the blue 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 *blue triangle symbol*. The Symbol Options dialog box displays.
2. Select the *Symbol Shape* tab.
3. Standard Shapes, scroll and select shape *10 check mark*.

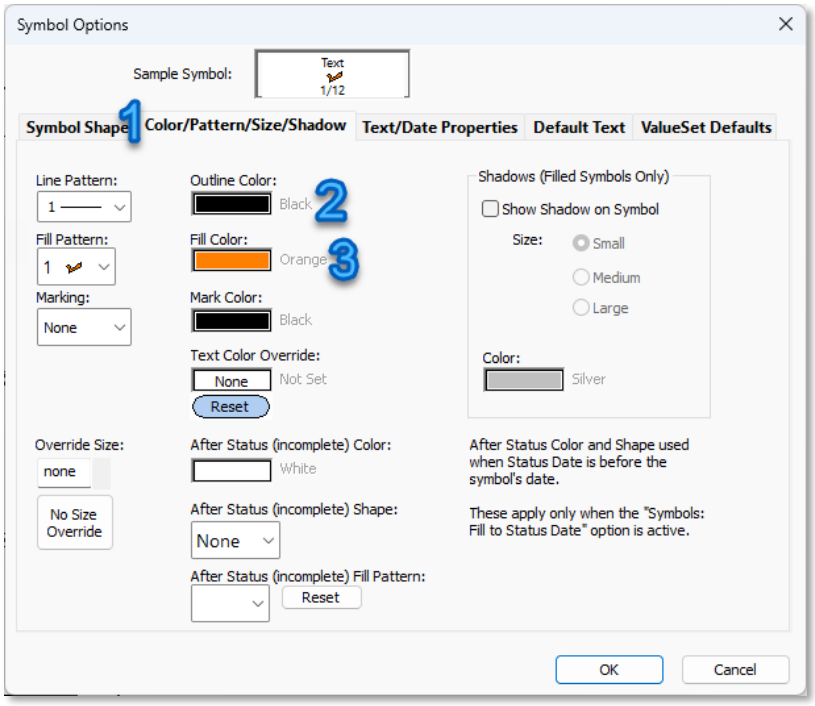
To have horizontal bars or vertical links on a schedule there must always be symbols to place the bar and vertical link between. To have the look of a bar use Standard Shapes: 28 (invisible symbol) at the ends of the horizontal bar.

Symbols by default are **Normal**. This is the usage type that should be used most often. **Comment Symbols** are ignored in calculations and Refresh. **Status Symbols** are used to show status and percent complete. **Baseline Symbols** have there own set of parameters. For more on each symbol option choose *Help | Help Topics*.



Change the symbol's color

1. Click the *Color/Pattern/Size/Shadow* tab.
2. Change Outline Color to *Black*.
3. Change Fill Color to *Orange*.

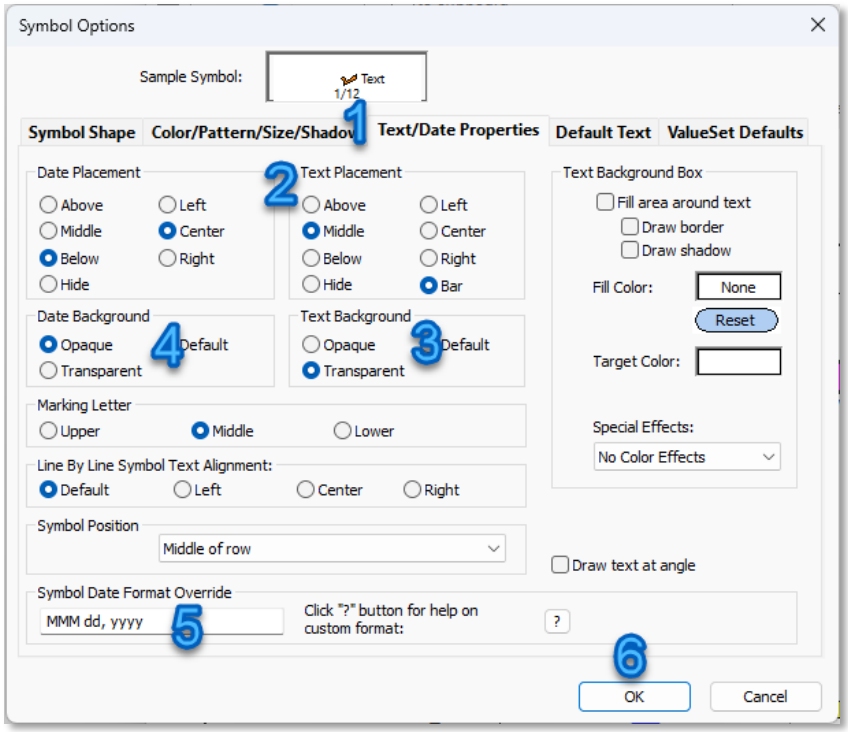


Change the appearance of symbols in the ToolBox (continued)

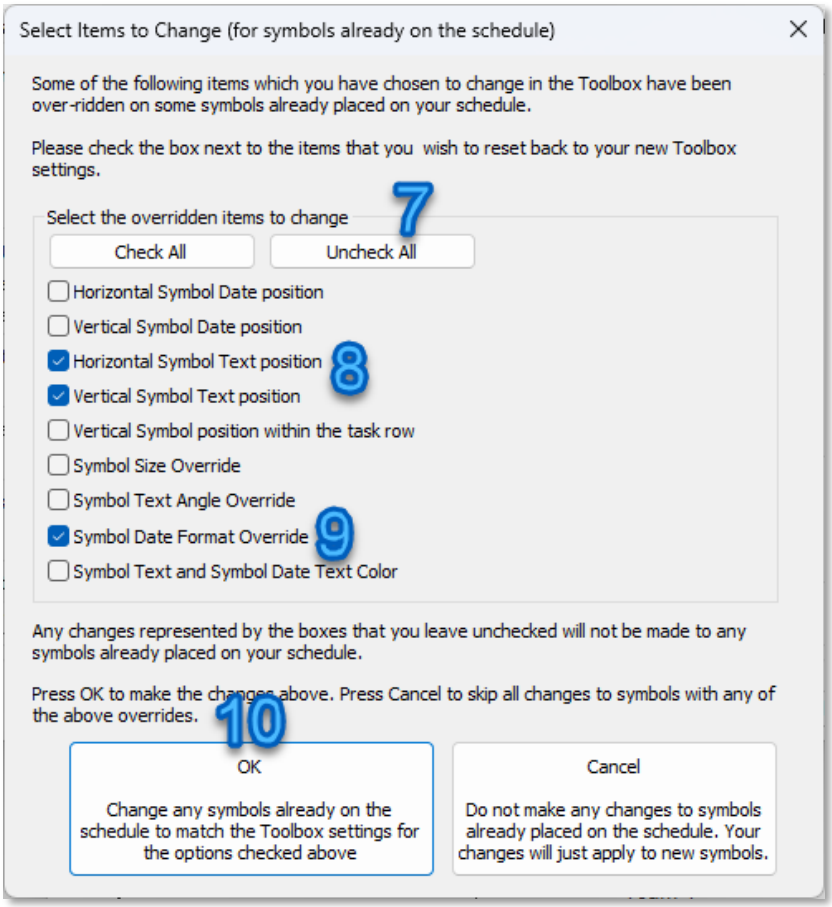
Change the Text Background and Placement and Date Placement

1. Click the Text/Date Properties tab.
2. Under Text Placement, choose *Middle* and *Bar*.
3. Under Text Background, choose *Transparent*.
4. Under Date Background, choose *Opaque*.
5. Under symbol Date Format Override enter *MMM dd, yyyy*.

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



6. Choose *OK*. Because symbols are currently on the schedule the Select Items to Change dialog will display. This dialog allows the selection of symbol characteristics to changes for symbols already on the schedule.
7. Select *Uncheck All*.
8. In step 2 the text's vertical and horizontal placement are being changed. To have those change take effect for symbols on the schedule ☑ *Horizontal Symbol Text position* and ☑ *Vertical Symbol Text position*.
9. In step 5 the Symbol Date Format was recoded to have that change take effect on the schedule ☑ *Symbol Date Format Override.*
10. Choose *OK*. See the results on the next page.



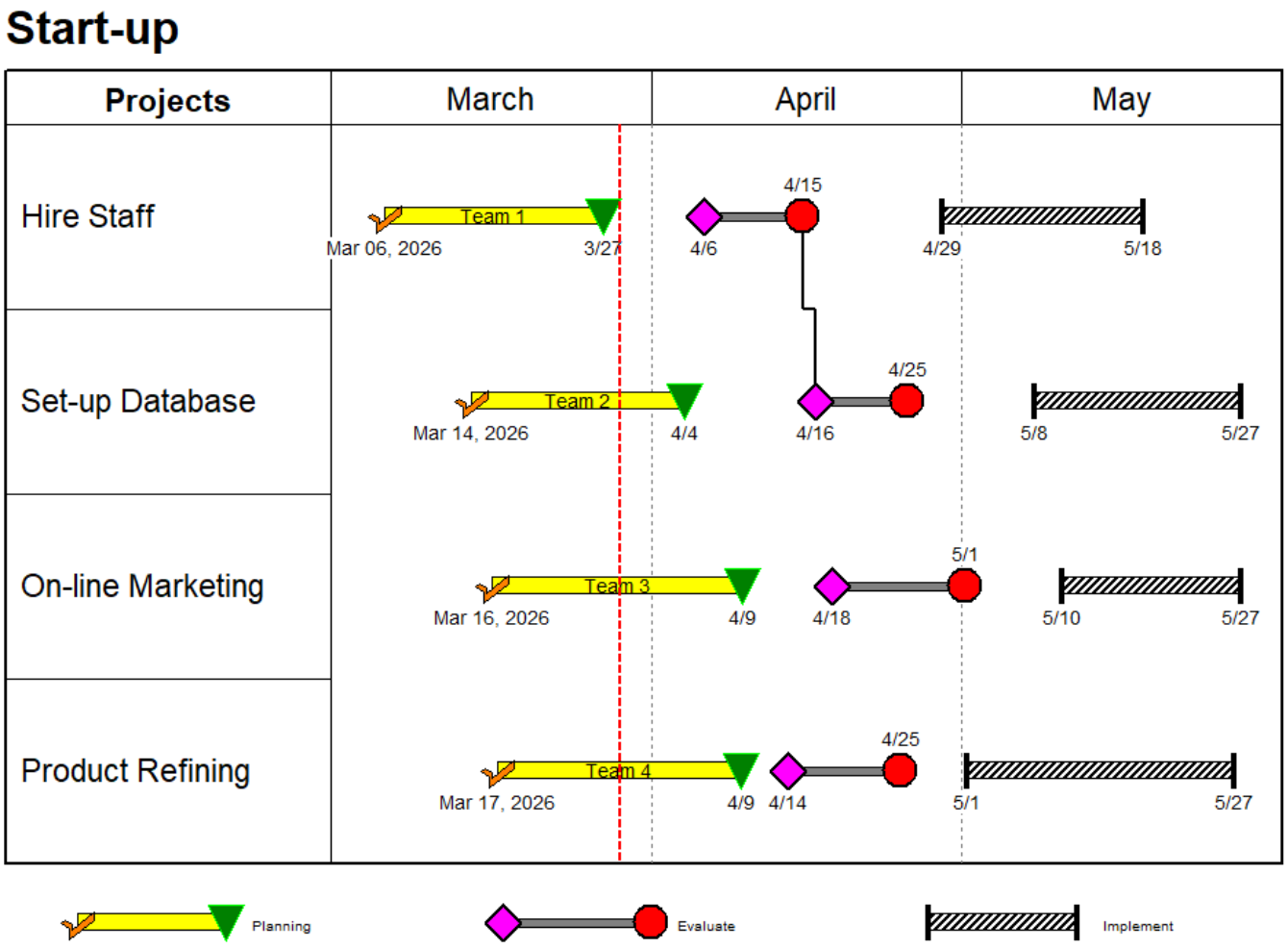
When in the Symbol Options dialog note the other tabs containing the following options.

- Default Text tab: Add text that will display each time the symbol is added to the schedule.
- ValueSet Default tab: Used for DataGraph. Assign to a Symbol ValueSet a value that will be added to the ValueSet each time the symbol is added to the schedule.

Change the appearance of symbols in the ToolBox (continued)

Result

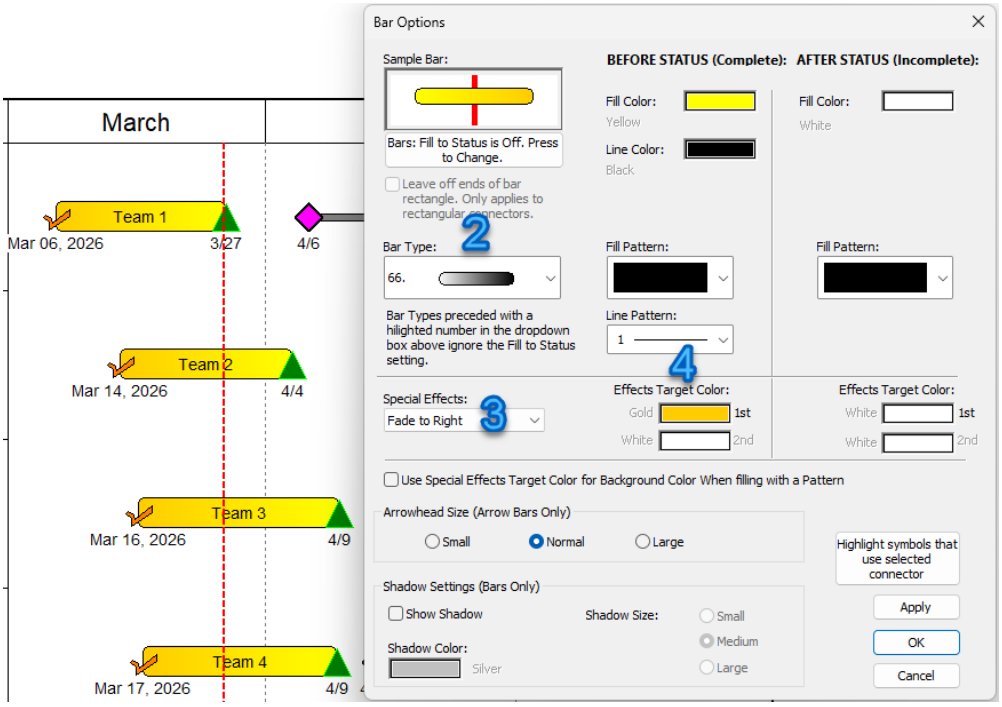
- All the blue triangles on schedule changed to an orange check mark outlined in black.
- The text associated with the blue triangle now the orange checkmark is now centered on the horizontal bar.
- The date associated with the blue triangle now the orange checkmark has been changed to the new format.



Change the appearance of horizontal bars in the ToolBox

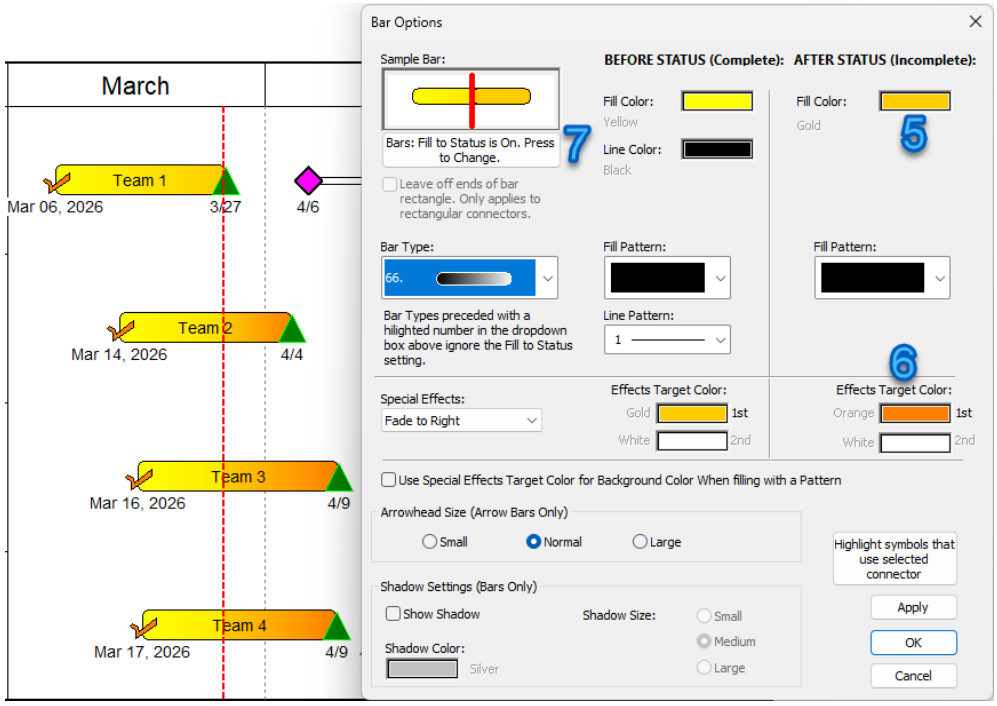
As with symbols, when a bar in the ToolBox is changed, and that bar already exists on the schedule, all bars of that type which are on the schedule change as well.

1. In the ToolBox, double-click on the *yellow horizontal bar*. The Bar Options box displays.
2. Change the Bar Type to *66* (wide rounded end bar.)
3. For Special Effects select *Fade to Right*.
4. For Effects Target Color choose *Gold*.

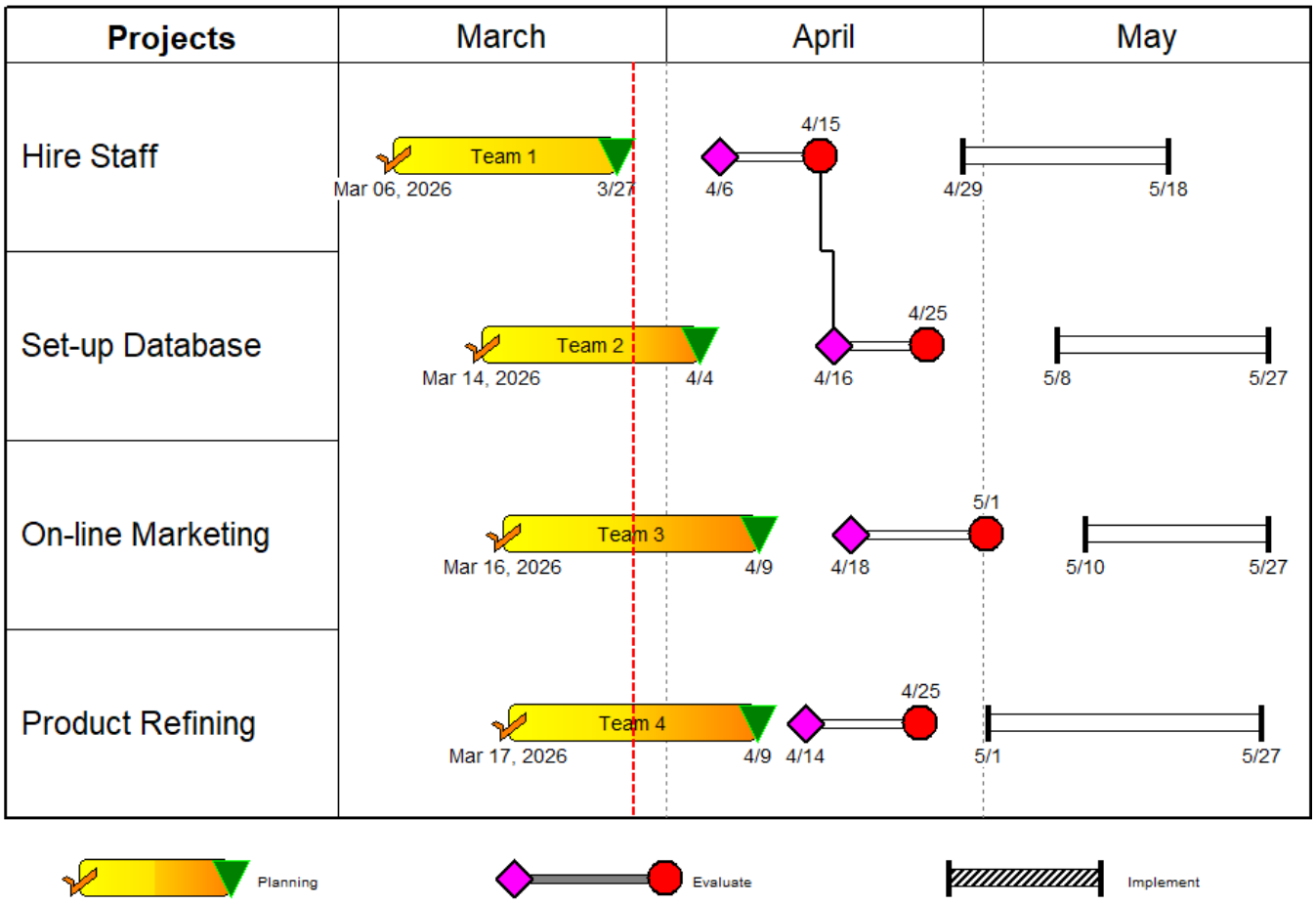


Horizontal bars can have an after status color. Under **Sample Bar:** select *Bars: Fill to Status is On. Press to Change*. The Sample Bar reflects the selection. Horizontal bars type's numbers highlighted yellow ignore fill to status.

5. Under AFTER STATUS *Fill Color:* choose *Gold*.
6. For Effects Target Color choose *Orange*.
7. Under Sample Bar's picture click *Bars: Fill to Status is off. Press to change.* Now, Fill to Status is on.



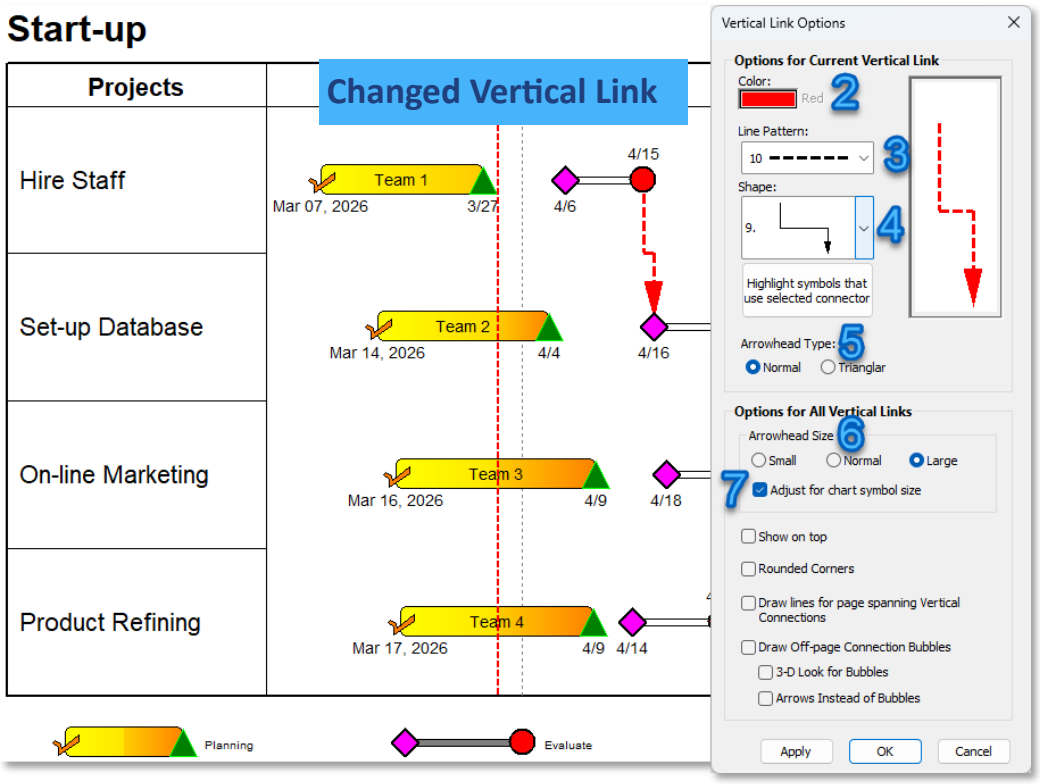
Result

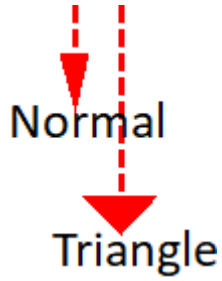

Start-up
Projects
March
April
May
Hire Staff
Team 1
Mar 06, 2026
3/27
4/15
4/6
4/29
5/18
Set-up Database
Team 2
Mar 14, 2026
4/4
4/25
4/16
5/8
5/27
On-line Marketing
Team 3
Mar 16, 2026
4/9
5/1
4/18
5/10
5/27
Product Refining
Team 4
Mar 17, 2026
4/9
4/25
4/14
5/1
5/27
Planning
Evaluate
Implement

Change the appearance of vertical links in the ToolBox

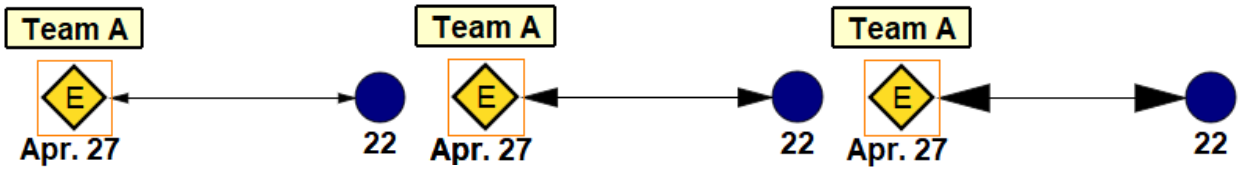
This schedule has just one vertical link. Vertical Links are customized similarly to the symbols and the horizontal bars:

1. Double-click the *first vertical link, in the ToolBox*. The 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*.





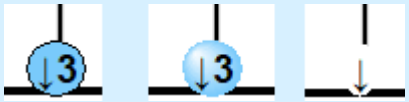
Horizontal bars with arrowheads can have the arrow heads as *Small*, *Normal* or *Large*.



6. For Arrowhead Size choose *Large*. This is a global setting for all vertical links.
7. Next, ☑*Adjust for chart symbol size*. This is a global setting for all vertical links.

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. Just ☑*Draw lines for page spanning Vertical Connections.*



- Vertical links can have helpful connection bubbles. ☑*Draw Off-page Connection Bubbles.*
- Bubbles can be plain or 3-D (☑*3-D Look for Bubbles*). 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. ☑*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. Choose File|*Open* to browse to the files to share a ToolBox or ToolBox row.

Switch between schedules in the same instance by using View | Window Controls | *Switch Window*.

ToolBox rows can be reordered. Select the small plus next to the row to be moved. Right click the ToolBox, select *Move Selected Row*.

Copy an entire ToolBox to 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* and select the other schedule.
5. Right-click that schedule's ToolBox and choose *Paste ToolBox.*

Copy a ToolBox row to another schedule

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*.