



**OnePager Express Quick-Start Guide**

Version 6.0

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## NEED HELP? ASK US!

E-Mail Support: [support@onepager.com](mailto:support@onepager.com)

Phone Support (U.S.): +1.303.779.0344, option 2

*(Outside the United States? Don't worry! E-mail us your question, and we will give you a toll-free number to call us, if you need to chat.)*

FAQs: <https://www.onepager.com/support/faq.php>

Video Tutorials:

[https://www.onepager.com/support/video\\_tutorials/video\\_tutorials\\_opx.html](https://www.onepager.com/support/video_tutorials/video_tutorials_opx.html)

## Installation

- (1) Find the **OnePager Express V6.0.n.exe** file you downloaded from our website or e-mail. (Don't have the file or need a new one? E-mail [support@onepager.com](mailto:support@onepager.com).)
- (2) Double-click on the exe file.
- (3) Follow the prompts of the installation wizard. Generally, you should only install OnePager on your own user account (**Just me**). Ask your system administrator if you are unsure.
- (4) Once the installation wizard completes, you will see a OnePager icon on your desktop:



## Preparing your Excel Spreadsheet for your First Project View

Place at least three columns in your Excel spreadsheet:

- a. A **Task Name**,
- b. A **Start Date** (formatted as a date, i.e. 12/15/2017), and
- c. A **Finish Date** (also formatted as a date)

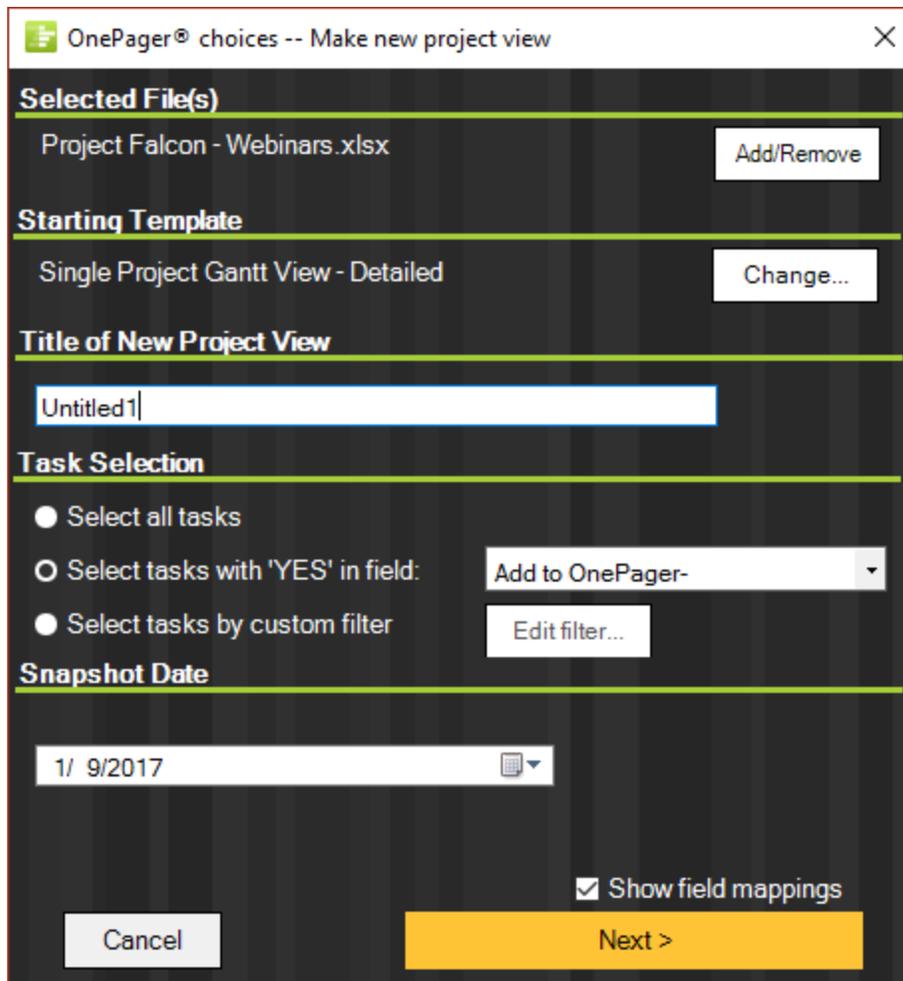
Other columns, such as **Add to OnePager**, **Resource**, **Category**, **Baseline Start Date**, **Baseline Finish Date**, etc. are optional, and may help you better organize your project view.

**You don't need to give your Excel columns these exact names** — we'll see how to select columns to display in your OnePager project view in a moment.

**IMPORTANT:** For maximum flexibility, one column in your spreadsheet should have unique values. The easiest way to ensure this is to insert an **ID** column and number the first task 1, the second task 2, and so forth.

## Creating Your Project View

- (1) Double-click the OnePager icon on your desktop (see above).
- (2) Choose **New** from the Start screen to make a brand-new project view.
- (3) The **OnePager Choices Form** will appear. Select which Microsoft Excel file you would like to use to create your project view by hitting the **Select...** button and browsing for the file.
- (4) Once a file is selected, the OnePager Choices Form will expand. Type a name for your new project view in the **Title of New Project View** box.



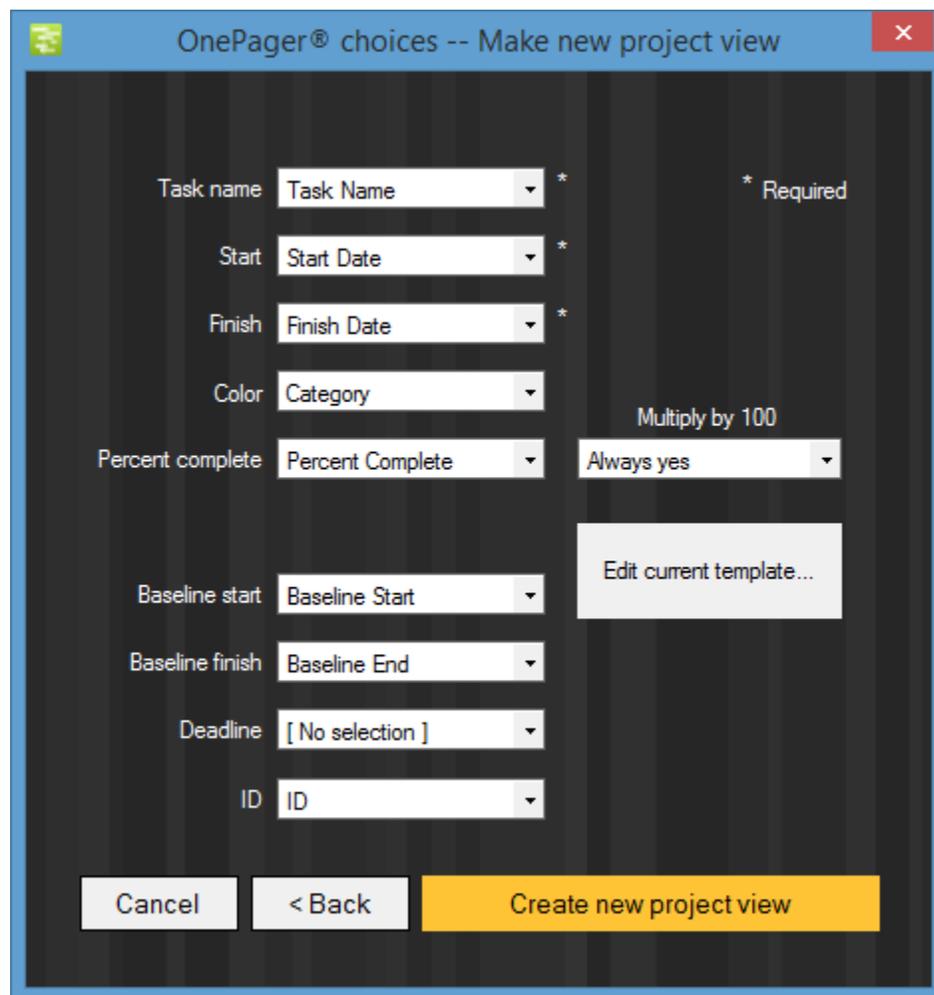
The screenshot shows a window titled "OnePager® choices -- Make new project view". The form is divided into several sections:

- Selected File(s)**: A text box contains "Project Falcon - Webinars.xlsx" with an "Add/Remove" button to its right.
- Starting Template**: A text box contains "Single Project Gantt View - Detailed" with a "Change..." button to its right.
- Title of New Project View**: A text box contains "Untitled1".
- Task Selection**: Three radio button options are listed:
  - Select all tasks
  - Select tasks with 'YES' in field: This option is selected. To its right is a dropdown menu showing "Add to OnePager-".
  - Select tasks by custom filter: To its right is an "Edit filter..." button.
- Snapshot Date**: A date picker shows "1/ 9/2017".
- At the bottom right, there is a checked checkbox for "Show field mappings".
- At the bottom, there are two buttons: a grey "Cancel" button and a yellow "Next >" button.

- (5) In the **Task selection** group, decide whether you want to **Select all tasks** from your Excel spreadsheet to display in your OnePager project view, or only some tasks. Here, we've chosen to display only those tasks with the value of **YES** in the column **Add to OnePager**. (This is a column from our Excel spreadsheet – **to select a different**

**column here, just use the dropdown menu.**) You may also use the **custom filter** feature to set a conditional import rule, i.e. only display tasks that are less than 100% complete.

- (6) Choose a **Snapshot date**, the as-of date of your project plan. Today's date is probably a good start.
- (7) Hit **Next**, and a second screen will appear, asking you to verify which columns from Excel correspond to the data elements that OnePager Express is expecting. For example, what column should OnePager use for your **Task name**? Your **Start** and **Finish** dates? Do you want a column that determines **Color**? You can make all these choices by using the dropdown menus. Ensure the unique ID column you created earlier (see section above) is selected in the ID dropdown.



The screenshot shows a dialog box titled "OnePager® choices -- Make new project view". It contains several dropdown menus for mapping Excel columns to project view fields:

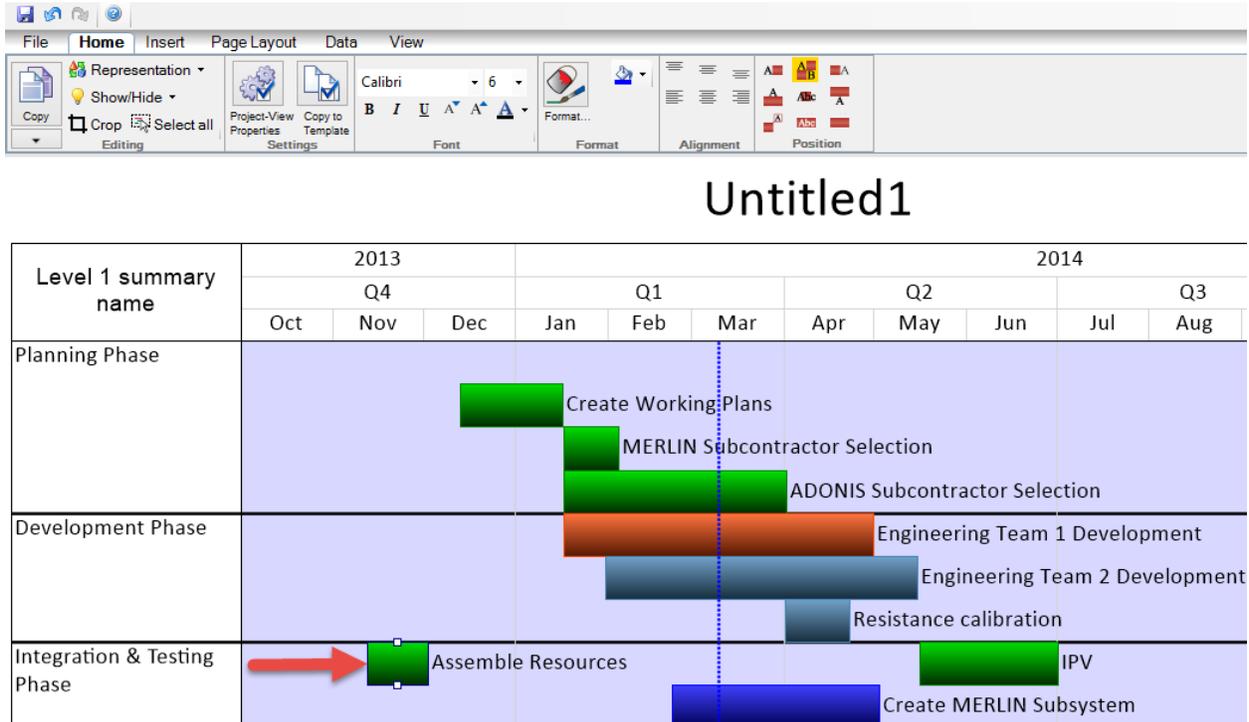
- Task name: Task Name \*
- Start: Start Date \*
- Finish: Finish Date \*
- Color: Category
- Percent complete: Percent Complete (with a "Multiply by 100" dropdown set to "Always yes")
- Baseline start: Baseline Start
- Baseline finish: Baseline End
- Deadline: [ No selection ]
- ID: ID

At the bottom, there are three buttons: "Cancel", "< Back", and "Create new project view".

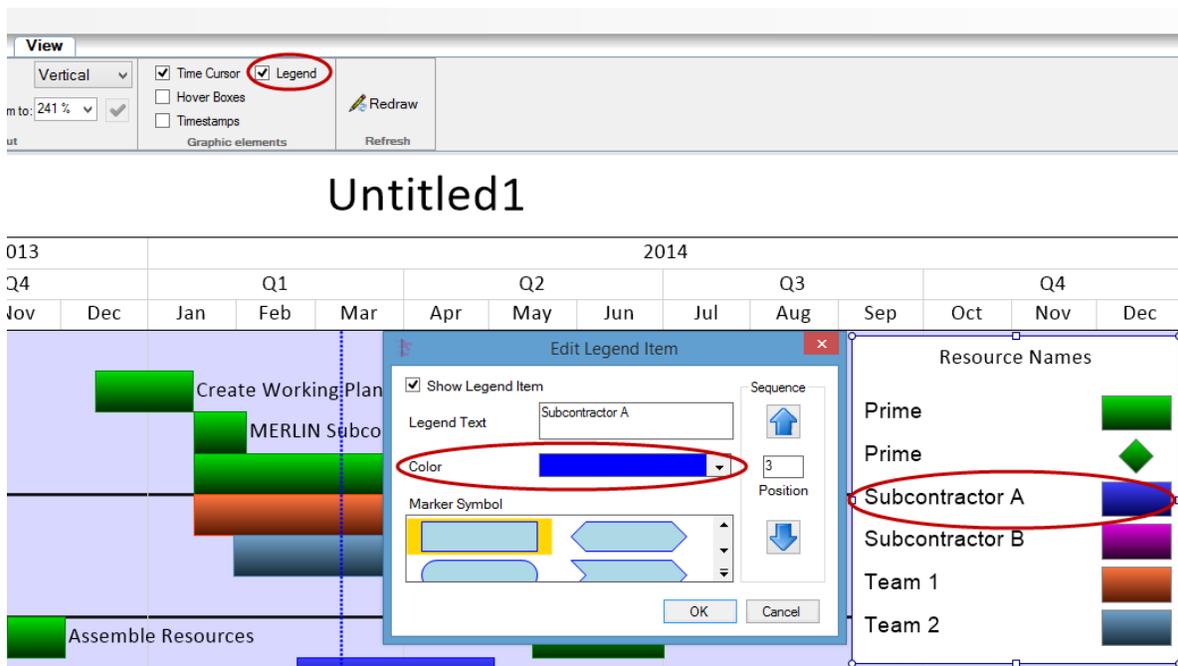
- (8) Finally, hit **Create new project view** at the bottom right. OnePager Express will import your data and display your project view.

## Editing your Project View

You can move task bars or milestones up or down by clicking and dragging them — just like in PowerPoint — or by clicking on them and using the up and down arrows on your keyboard.



To change the colors of task bars or milestones, the fastest way is to use the **Legend**. Toggle your Legend on in the **View** tab (click the checkbox in the **Graphic Elements** group). Then, **double-click** on the name of a legend item to bring up the **Edit Legend Item** dialog box. Change the color to anything you want, and every task bar/milestone associated with that legend item will automatically recolor itself.



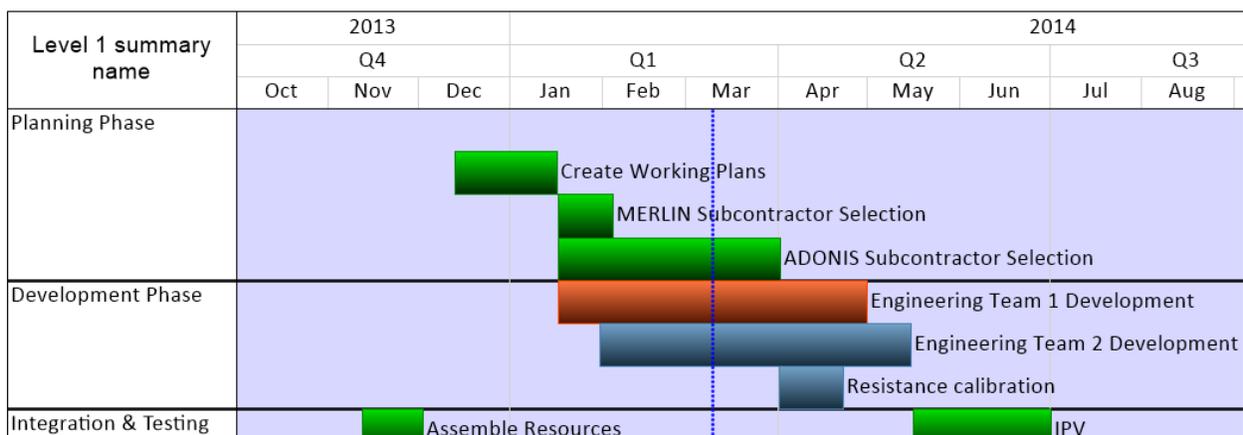
## Untitled1

### Exporting your Project View to PowerPoint

- (1) Click the **Copy** button on the left-hand side of the **Home** tab.



## Untitled1



- (2) Open **Microsoft PowerPoint**, make a new slide, and **paste (CTRL-V)** your project view as a resizable graphic into the slide. You're all set!



Now, if you want to reopen your project view to edit it later, browse for the file in your file system and double-click on it.

## **Further Assistance**

We are eager to help you use OnePager Express to its full potential. Please e-mail us with any questions at [support@onepager.com](mailto:support@onepager.com), or call us at +1.303.779.0344 (option 2). (Non-U.S. customers, please e-mail first and we will provide you with a toll-free phone number for your country if needed.) You may also find our FAQ (<https://www.onepager.com/support/faq.php>) and video tutorial ([https://www.onepager.com/support/video\\_tutorials/video\\_tutorials\\_opx.html](https://www.onepager.com/support/video_tutorials/video_tutorials_opx.html)) pages answer your question.