



**User Guide**

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## QUICK START GUIDE

### NEED HELP? ASK US!

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

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

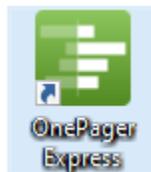
*(Outside the United States? Don't worry! E-mail us your question, and we will give you a toll-free number to call us, if you need to chat.)*

[FAQs](#)

[Video Tutorials](#)

## 1. Installation

- (1) Find the **OnePager Express Vx.y.z 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:



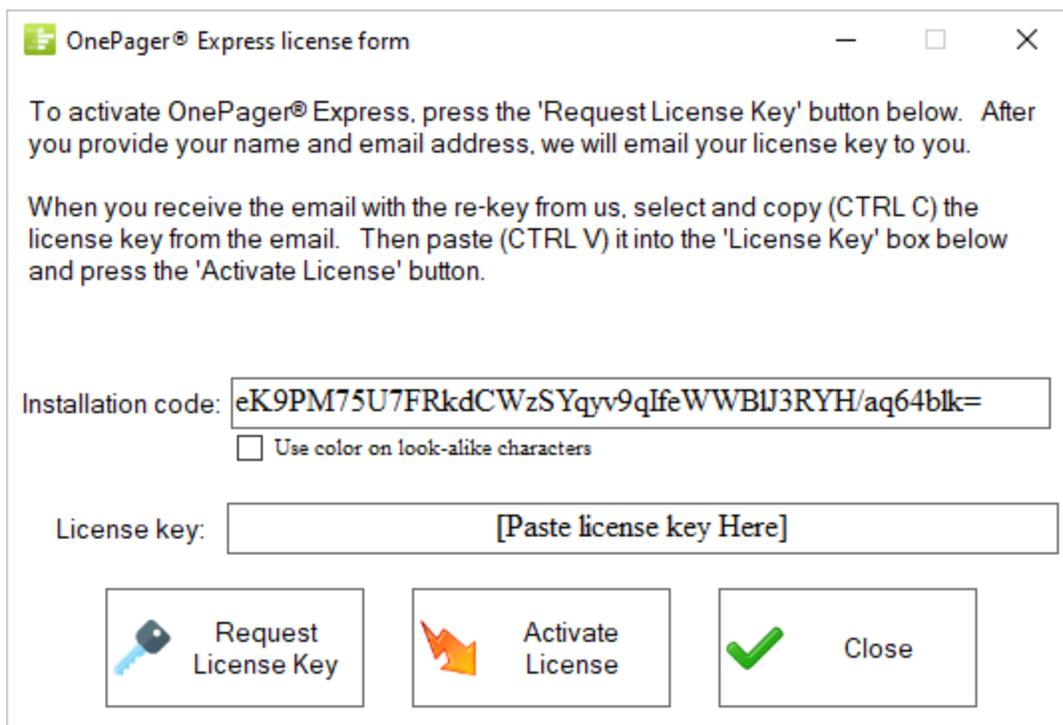
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## 2. Licensing

- (1) Double-click the OnePager icon on your desktop (shown above). When the **OnePager Express Start** screen appears, click the **HELP** button and then click the **Get Standard License** button:



(2) A new window will pop up. Click the **Request License Key** button at the bottom left.



OnePager Express license form

To activate OnePager Express, press the 'Request License Key' button below. After you provide your name and email address, we will email your license key to you.

When you receive the email with the re-key from us, select and copy (CTRL C) the license key from the email. Then paste (CTRL V) it into the 'License Key' box below and press the 'Activate License' button.

Installation code:   Use color on look-alike characters

License key:

(3) You will be taken to our website (the page is <https://www.onepager.com/support/license.php>). Enter your name, company, e-mail address, and Order Number. For **Product** select **OnePager Express**. Your installation code has been filled in for you. Your **Order #** can be found in the e-mail from which you downloaded the **.exe** file. Specify your **Reason for Request** (New or Replacement key), then hit **Request Key**.

(4) Check your e-mail. If all your information matches our records, a license key will be automatically e-mailed to you. Go back to the **OnePager Express License Form** (it should

still be open) and paste the key where it says **[Paste license key Here]**. Then, click **Activate License**. You will get a message telling you that your license is permanently activated on this computer.

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### 3. Preparing your Excel Spreadsheet for your First Chart

Place at least three columns in your Excel spreadsheet:

- a. A **Task Name**,
- b. A **Start Date** (formatted as a date, i.e. 12/15/2018), 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 chart.

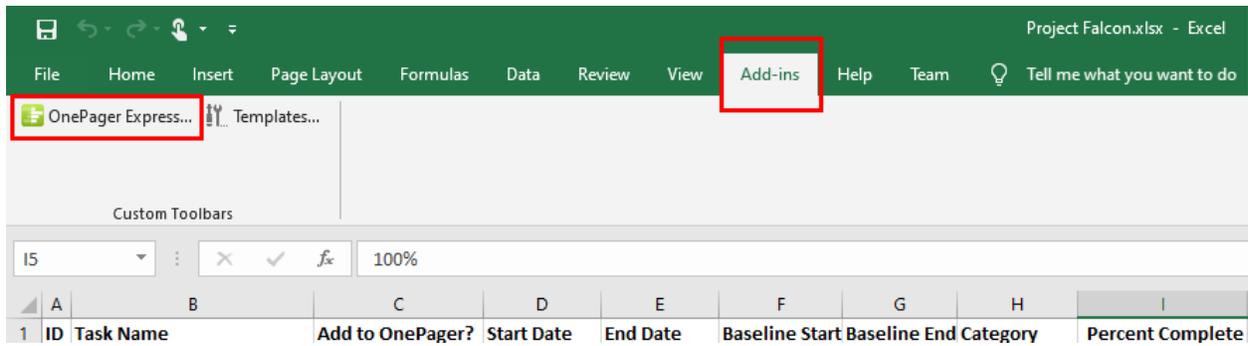
**You don't need to give your Excel columns these exact names** — we'll see how to select columns to display in your OnePager chart in a moment.

**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.

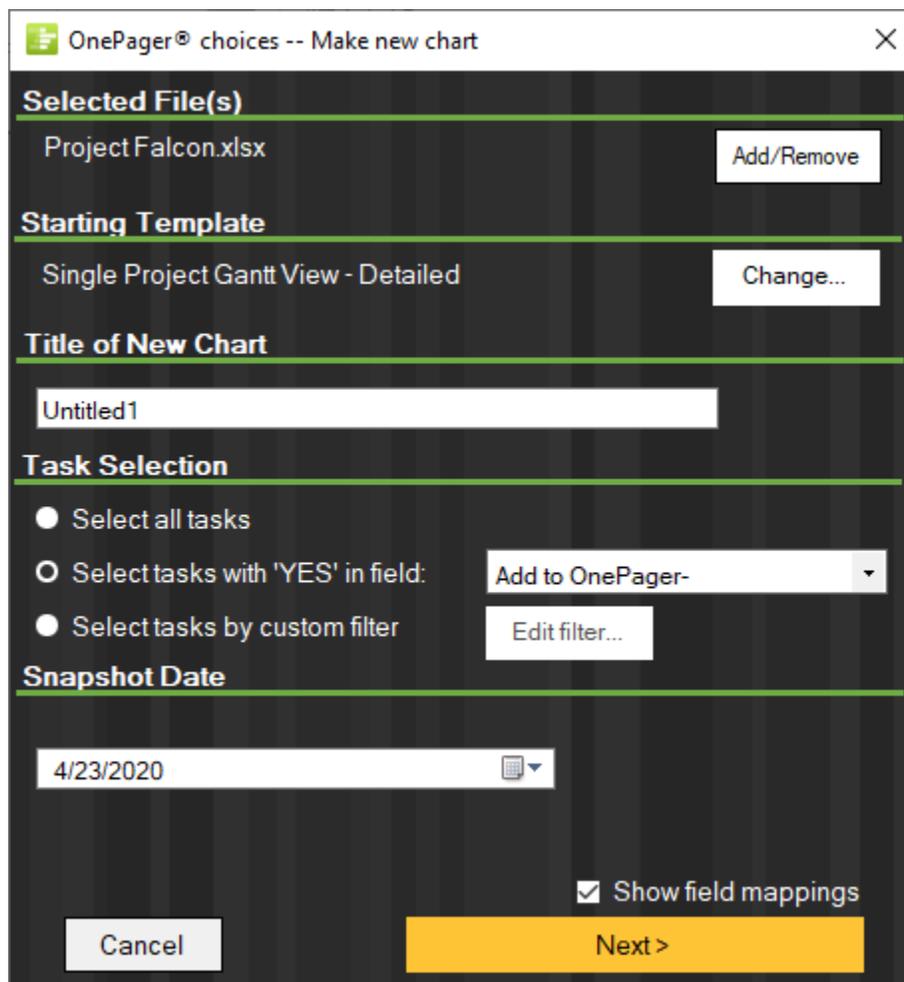
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### 4. Creating your Chart

- (1) Double-click the OnePager icon on your desktop (see above).
- (2) Choose **New** from the Start screen to make a brand-new chart.
- (3) The **OnePager Choices Form** will appear. Select which Microsoft Excel file you would like to use to create your chart by hitting the **Select...** button and browsing for the file.
  - a. Alternatively, just open the Microsoft Excel file you would like to use. Go to the **Add-Ins** tab and click the **OnePager Express** button (see below). Then choose **New**.



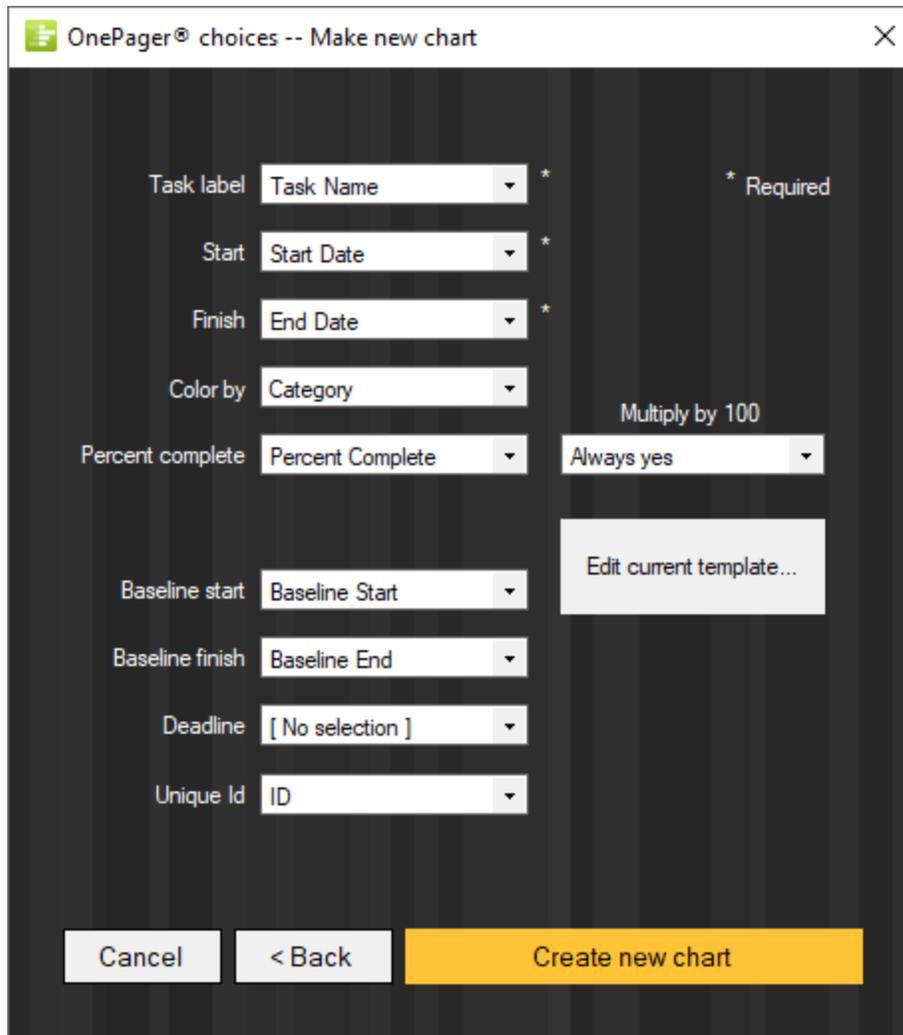
(4) Once a file is selected, type a name for your new chart in the **Title of New Chart** box.



(5) In the **Task selection** group, decide whether you want to **Select all tasks** from your Excel file to display in your OnePager chart, 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 #3 above) is selected in the ID dropdown.



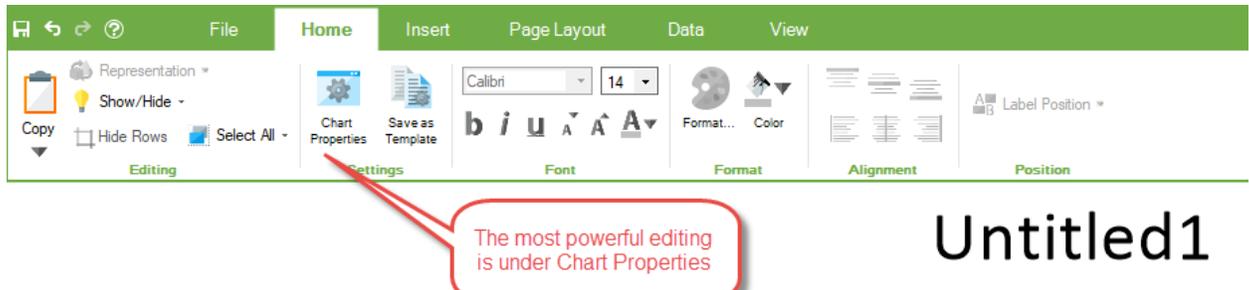
- (8) Finally, hit **Create new chart** at the bottom right. OnePager Express will import your data and display your chart.

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## 5. Editing your Chart

OnePager gives you two main ways to edit your chart:

1. **Manually**, by right-clicking and changing colors, fonts, and other formatting by hand
2. **Automatically**, by changing settings and rules under **Home > Chart Properties** form:



The screenshot shows the software interface with the 'Home' ribbon selected. The 'Chart Properties' button is highlighted with a red callout box containing the text: "The most powerful editing is under Chart Properties".

Category	2012			
	Q3		Q4	
	Sep	Oct	Nov	
Inception	Inception			
	Update Sizings			
	Team Alignment			
	Communication Plan			
	Clarify User Cases			
	Phase Checkpoint - 2			

It's often tempting to change your chart manually, because these PowerPoint-style edits are very intuitive. However, when you edit your chart by hand, you are selling OnePager short, and probably signing yourself up for even more editing in the future.

Here's why it's better to customize your chart through **Chart Properties** instead of making changes by hand:

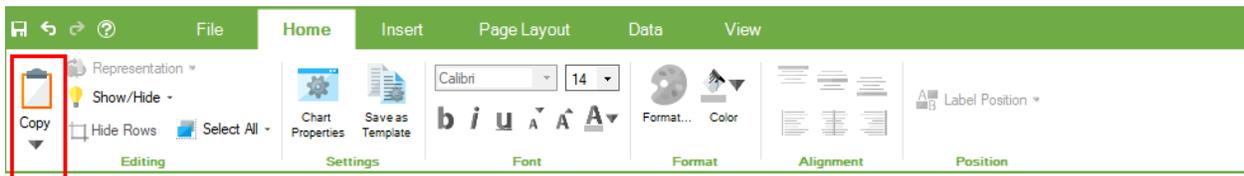
1. **Speed:** Changing settings through Chart Properties lets you change lots of things at once. For example, if you want to change the font for all of your tasks, it's much faster to change your default font once through Chart Properties than it is to select tasks one at a time and change fonts individually.
2. **Repeatability:** When you change settings through Chart Properties, those changes can eventually be made into a template, making it easier to repeat the same formatting in other reports. Manual edits cannot be incorporated into a template—ever. If you're going to invest a lot of time in getting your chart to look the way you want, make sure that you can reuse those settings in the future.

3. **Accuracy:** The more hand-edits you make to a chart, the farther it gets from reality. Letting OnePager dynamically assign colors is always going to be accurate. On the other hand, if you are hand-painting colors in your OnePager chart, you'll have to review each one of those colors for accuracy every time your project changes, which leaves a lot of room for error.

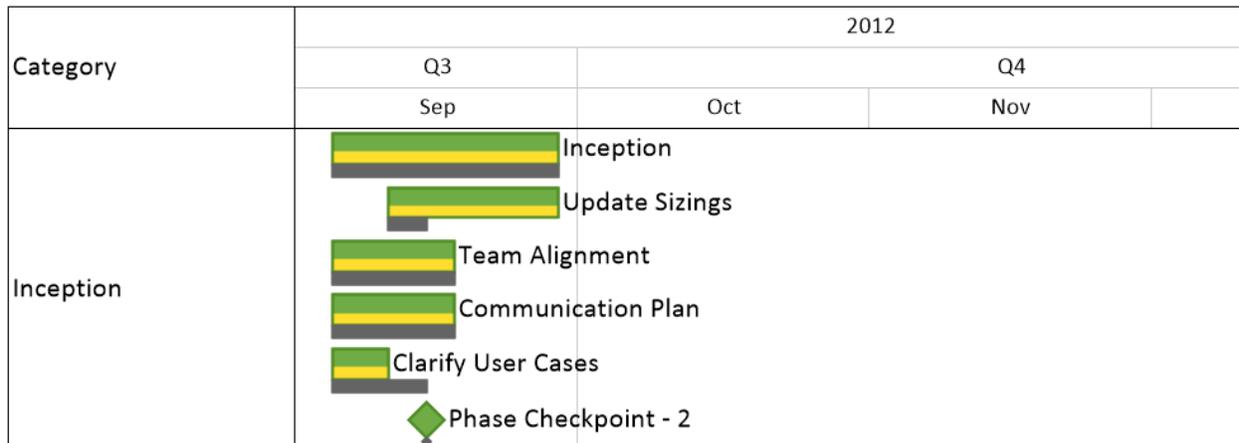
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## 6. Exporting your Chart to PowerPoint

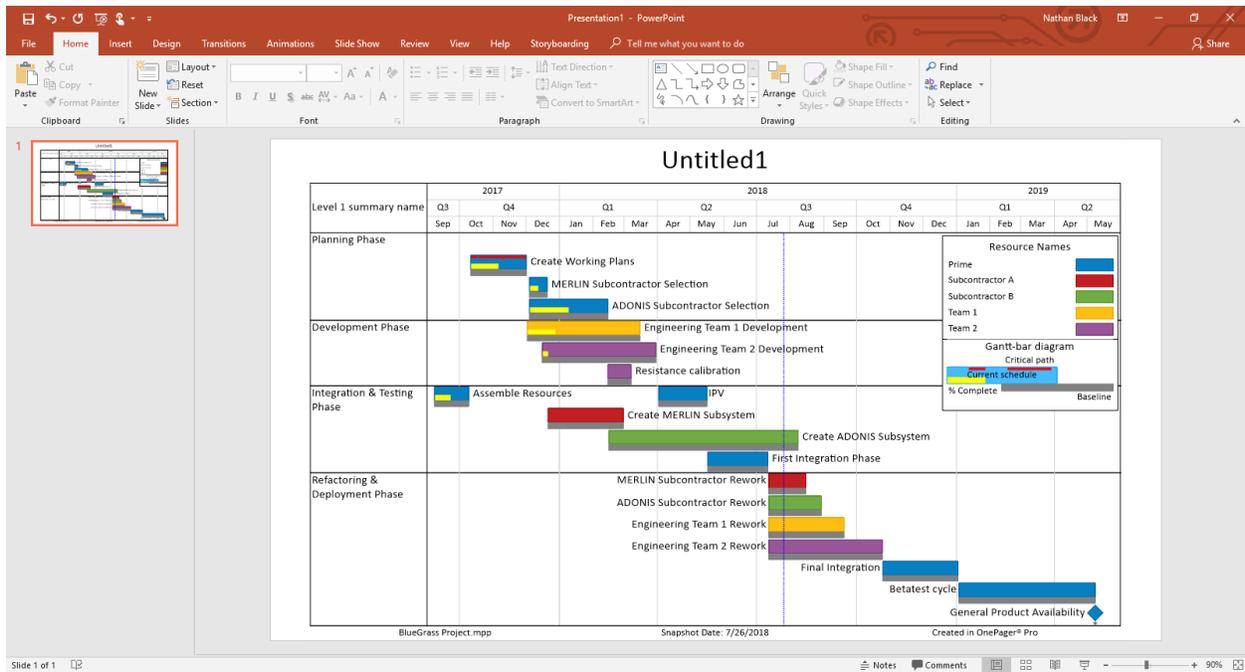
- (1) Click the **Copy** button on the left-hand side of the **Home** tab.



Untitled1



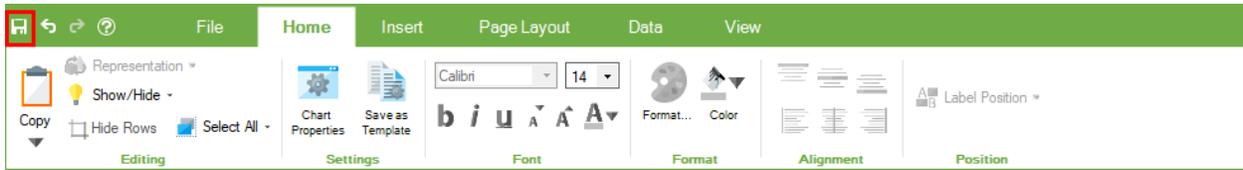
- (2) Open **Microsoft PowerPoint**, make a new slide, and **paste (CTRL-V)** your chart as a resizable graphic into the slide. You're all set!



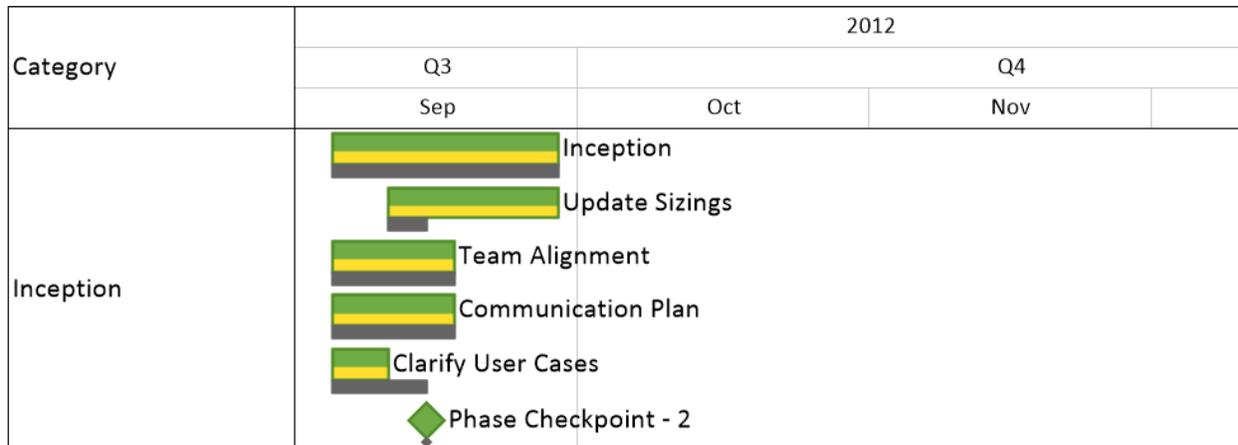
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## 7. Saving and Coming Back to your Chart

To **Save** your chart with all the edits you have made to it, hit the blue disk icon in the upper left-hand corner. You will be prompted to name your file and choose a place to save it on your hard drive, or in a network location for easy sharing.



# Untitled1



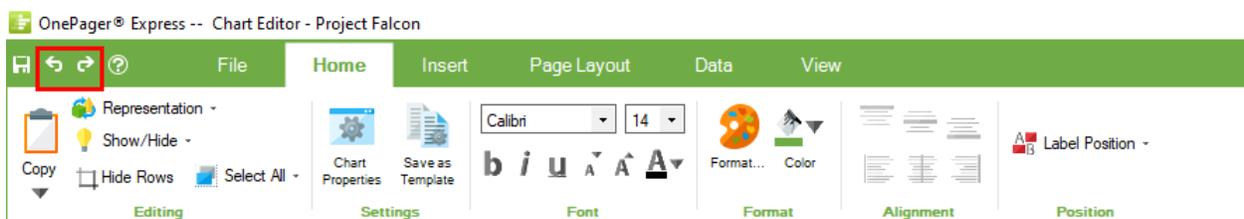
Now, if you want to reopen your chart to edit it later, browse for the file in your file system and double-click on it.

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## FURTHER EDITING YOUR CHART

### 8. Undoing/Redoing Edits

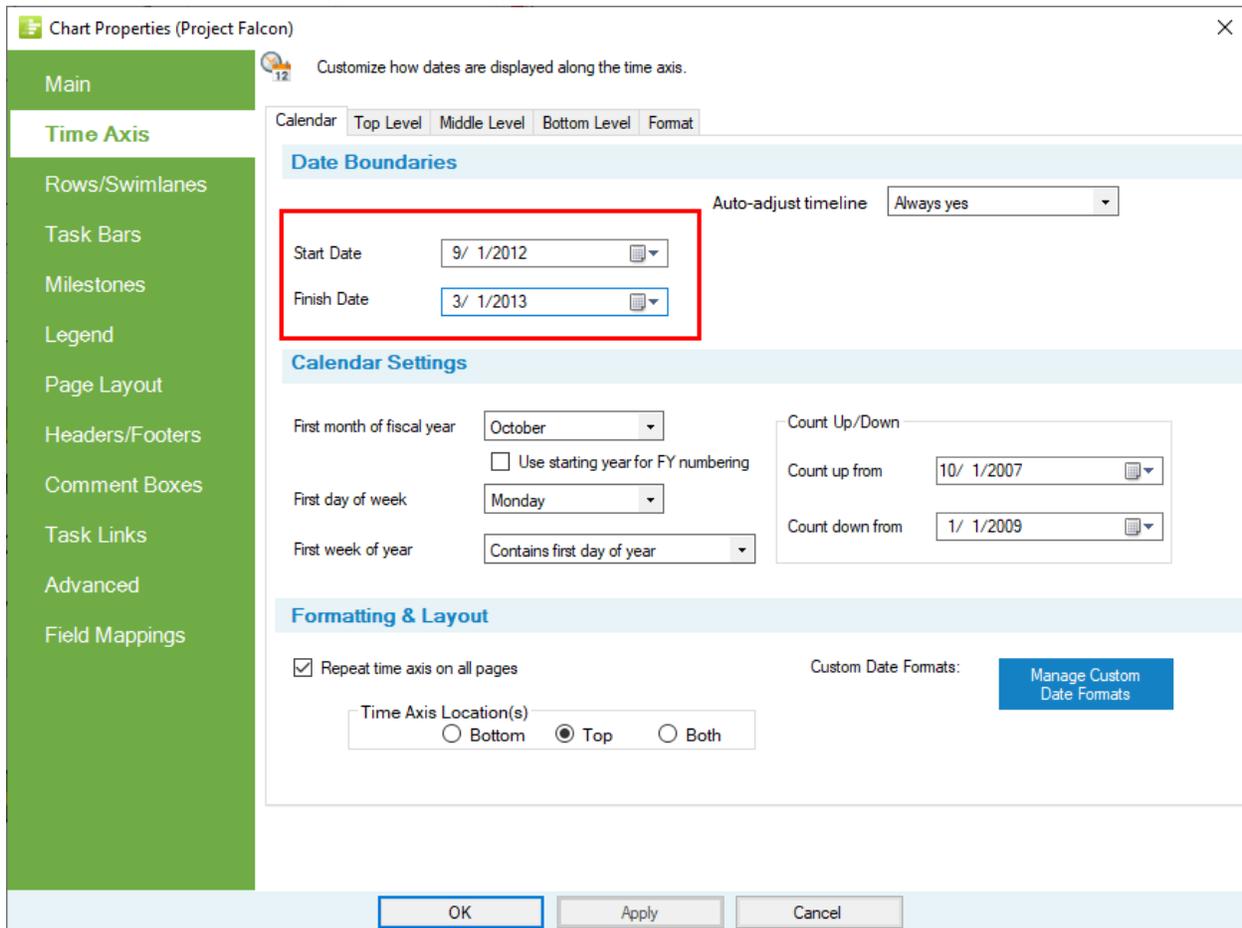
To undo any action you took during your current session of OnePager, click the left-facing blue arrow at the top left of the screen. To redo any previously undone action, click the right-facing blue arrow. Hovering over these arrows with the mouse will tell you the next action you can undo/redo. You can undo up to 100 changes in a single session, so don't be afraid to experiment a little!



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### 9. Changing the Date Range

By default, OnePager sets the date range of your chart to include all of the tasks and milestones that you have imported. If you want to show a longer or shorter date range, click the **Chart Properties** button from the **Home** tab of the ribbon. From the **Time Axis** tab of Chart Properties (**Calendar** sub-tab), simply enter the new desired start/finish date of your chart. Hit **OK** or **Apply** to implement your changes.



OnePager may automatically adjust your date range if the Excel data you import has a task date earlier than your **Start** date, or a task date later than your **Finish** date. To prevent these automatic adjustments, on the same tab of the Chart Properties menu, change the **Auto-adjust timeline** dropdown selection to **Always no**.

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## 10. Changing Default Shapes, Colors, and Labels of Task Bars and Milestones

Whenever possible, we recommend changing the formatting of all task bars and milestones at once, rather than hand-editing them one by one. (On one-by-one editing, see [#19](#) below.)

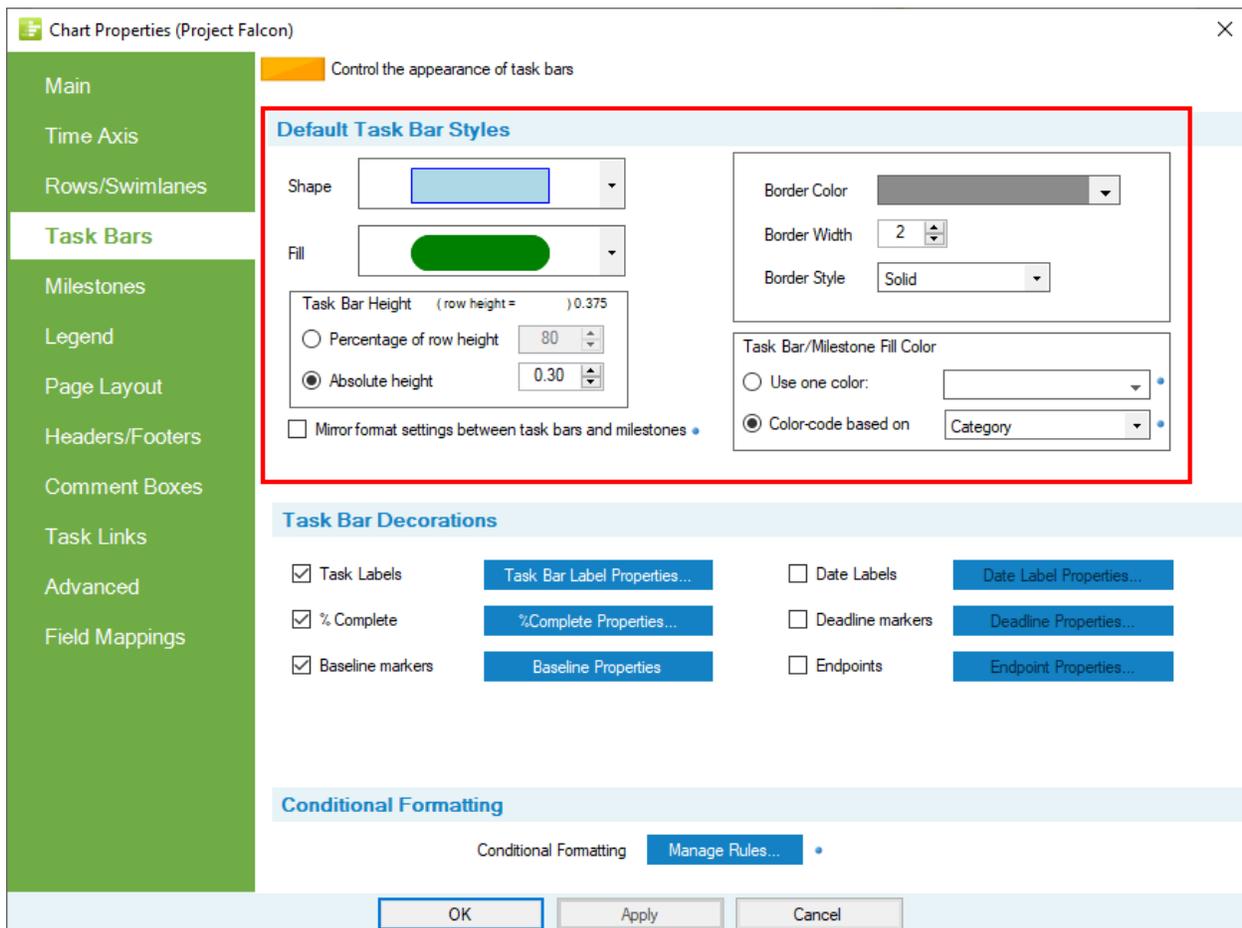
To change the default formatting for all task bars or milestones, click the **Chart Properties** button from the **Home** tab of the ribbon. To modify task bars, go to the **Task Bars** tab of Chart Properties; to modify milestones, go to the **Milestones** tab. From either tab, you can:

- (a) Change default shape and fill pattern.
- (b) Change default shape height.

- (c) Change default shape color. Many users prefer to use the **Color-code based on** dropdown, which allows you to choose a data field from Microsoft Excel that will drive color assignments (i.e., all tasks assigned to Team A get colored red; all tasks assigned to Team B get colored blue).

**NOTE:** Any color-coding rule you set for task bars will also apply to milestones, and vice versa. If you want task bars and milestones to follow separate color-coding rules, see [#23](#) below.

Hit **OK** or **Apply** to implement your changes.

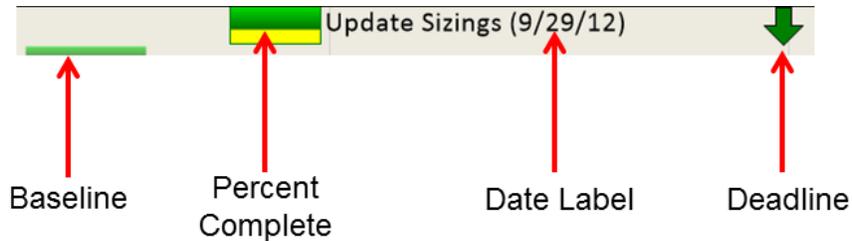


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## 11. Adding Percent Complete, Baseline, and Other Decorations

Click the **Chart Properties** button from the **Home** tab of the ribbon and go to either the **Task Bars** or **Milestones** tab (see screenshot above).

The checkboxes in the **Gantt Bar/Milestone Symbol Decorations** section allow you to turn on decorations representing the percent complete, the baseline start/finish dates, and other decorations such as date labels, deadlines, and endpoints. You can modify the fonts and colors of these decorations using the **Properties** buttons to the right of each checkbox. For example, if you want to show percent complete as a different color, or you want to show your baseline dates as text, you can do this through the properties of each type of decoration. Hit **OK** or **Apply** to implement your changes.



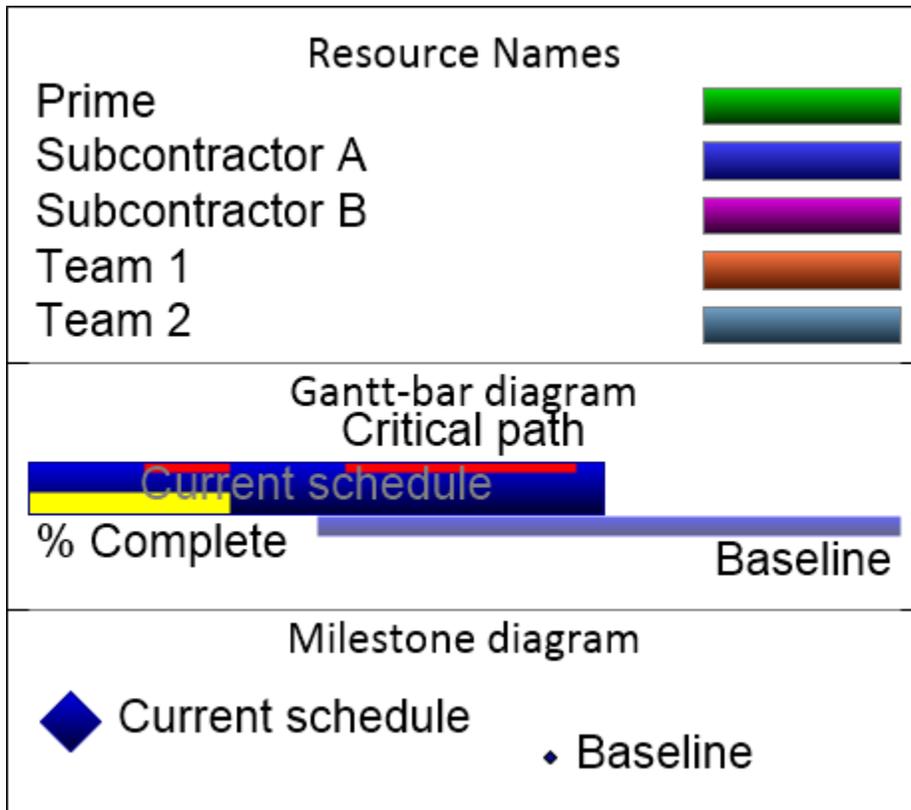
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## 12. Customizing the Legend

You can choose to show the legend anywhere on the page, or not at all. To turn the legend off, go to the **View** tab of the ribbon, find the **Graphic Elements** group, and uncheck the **Legend** checkbox.

To change the legend title, **right-click** on empty space in the legend and choose **Edit legend title...** from the context menu.

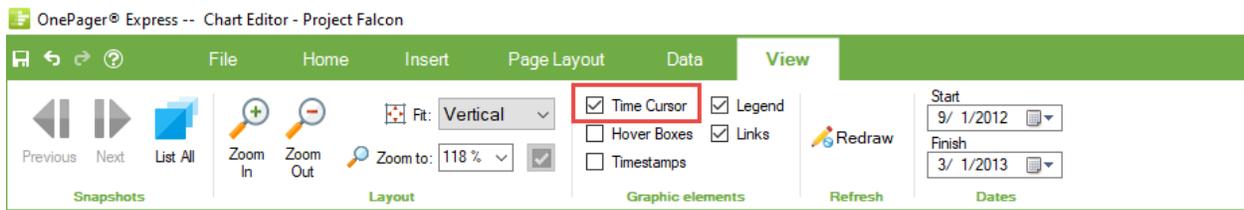
The legend has an optional **Gantt-bar diagram** and **Milestone diagram** that show what the decorations on each task bar and milestone mean (see below). To turn these diagrams on or off, click the **Chart Properties** button from the **Home** tab on the ribbon and go to the **Legend** tab. Check or uncheck **Gantt-bar diagram** and **Milestone diagram** at the bottom of the menu. Hit **OK** or **Apply** to implement your changes.



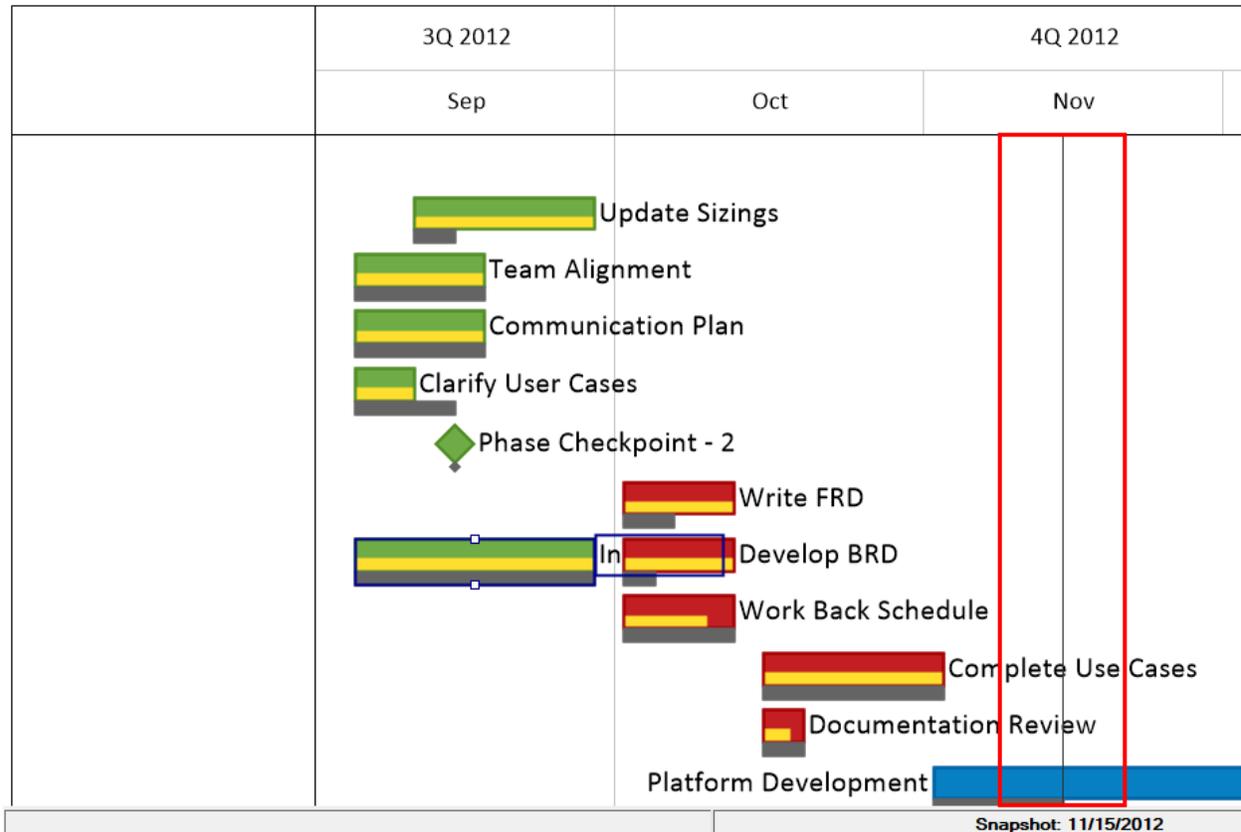
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### 13. Showing/Hiding/Formatting the Time Cursor

The time cursor is the vertical line on your chart that shows the snapshot or “as-of” date. It displays by default. To hide it, from the **View** tab of the ribbon, find the **Graphic Elements** group, and uncheck the **Time Cursor** checkbox.



# Untitled1



To change the format of the time cursor, click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Time Axis** tab. Click the **Time cursor properties...** button at the bottom right of the **Calendar** sub-tab. This dialog box controls the line color, line width, and line dash style of the time cursor.

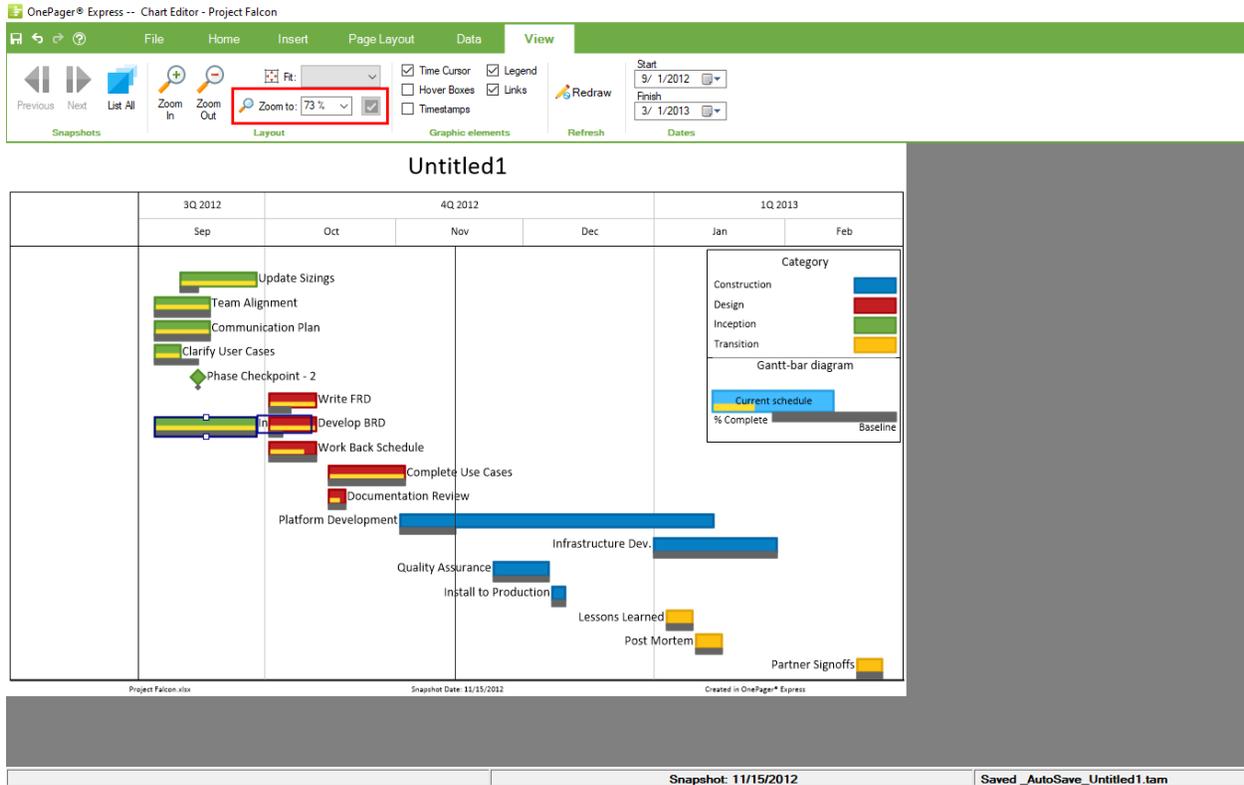
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## 14. Changing Dimensions of your Chart

If your OnePager chart is too wide, narrow, tall, or short when you export or print it, you probably need to change your aspect (width:height) ratio. You can do this in one of two ways:

*Change aspect ratio by dragging*

First, zoom out so that the edges of your chart are surrounded by gray space. To zoom out, go to the **View** tab and change the **Zoom to** setting to a smaller percentage.

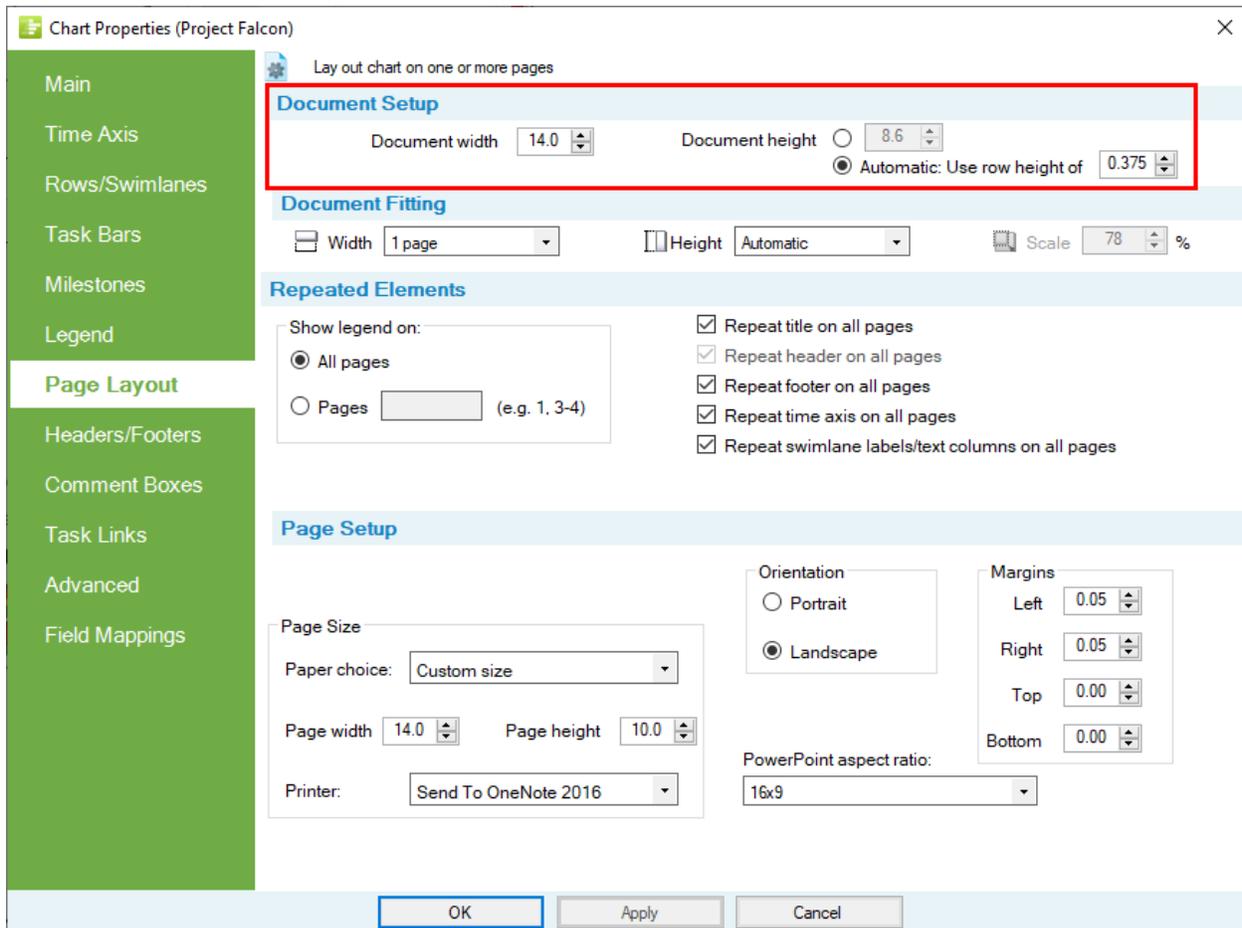


Second, drag the edges of your chart up, down, left, right, or diagonally to resize the chart, just like you would a box or image in PowerPoint.

### *Change aspect ratio in Chart Properties*

First, go to the **Home** tab and click the **Chart Properties** button. From there, click on the **Page Layout** tab.

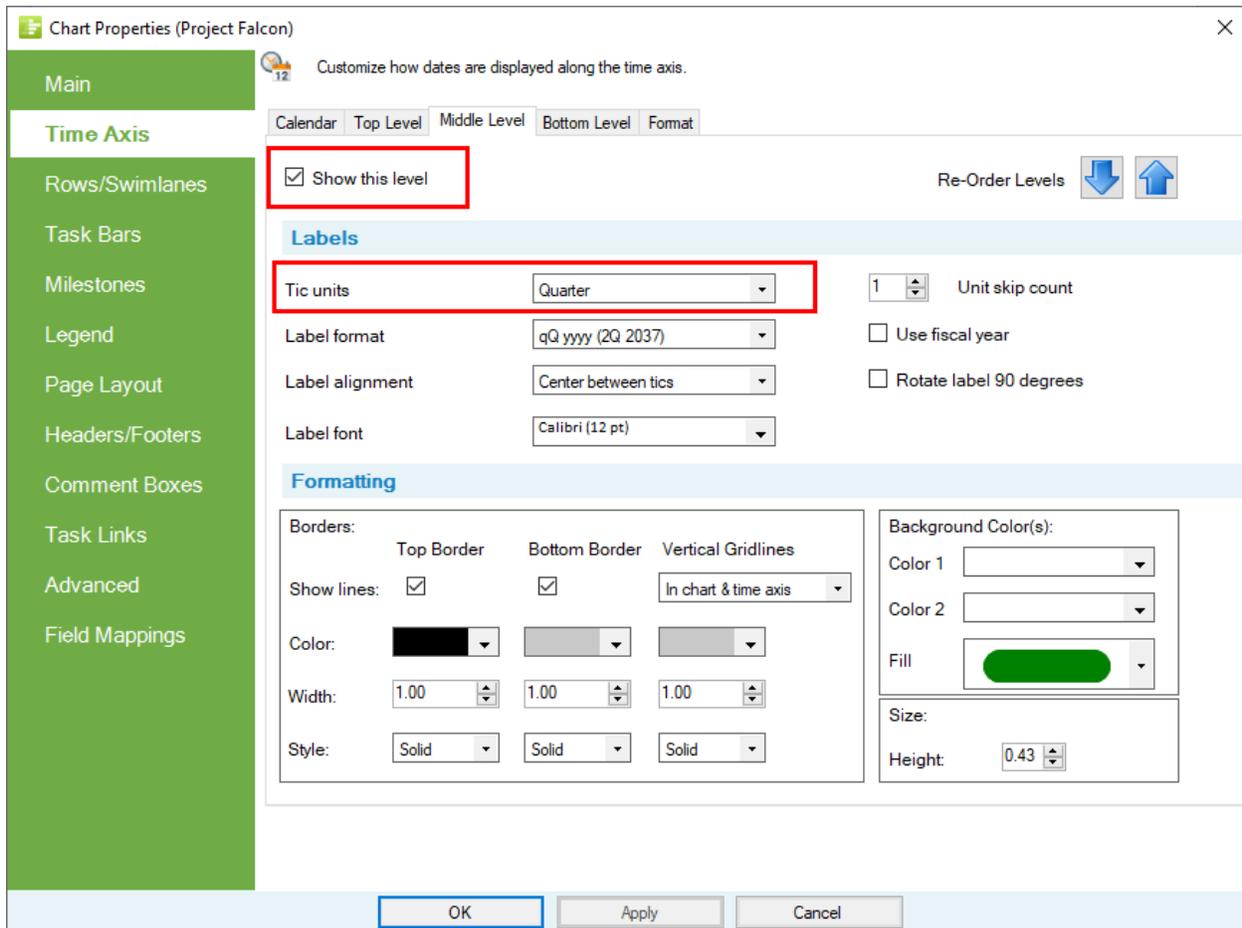
Second, manually adjust the **Document width** and **Document height** settings at the top of the menu. For U.S. customers, these numbers are measured by default in inches; for most other countries, centimeters. When possible, we recommend your width be approximately 5/3 of your height; [read our blog post on why](#). Hit **OK** or **Apply** to implement your changes.



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## 15. Modifying the Time Axis Units

To change the units – years, quarters, months, days, etc. – of the time axis, go to **Home > Chart Properties > Time Axis**, then select the subtab corresponding to the level for which you want to change units (**Top Level**, **Middle Level**, or **Bottom Level**).



Modify the **Tic units** dropdown on each tab to specify which units should be used on that time axis level. To get rid of a time axis level entirely, or to add a level, change the **Show this level** checkbox at the top of each tab. OnePager allows you to have one, two, or three time axis levels. Hit **OK** or **Apply** to implement your changes.

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## 16. Adding/Modifying the Title, Headers, and Footers

You set your **title** when you created the chart, and it will display by default. To modify the text in the title, double-click on it. To change the title font, font size, or font color, click the **Chart Properties** button from the **Home** ribbon and go to the **Headers/Footers** tab. Title font controls are at the top of this menu.

Chart Properties (Project Falcon) [X]

Set properties of the title, headers, and footers

**Title**

Show title    Title Font: Calibri (34 pt)    Title Height: 0.75     Repeat on all pages

**Headers and Footers**

Header/Footer Font: Calibri (19 pt)

Show headers    Header height: 0.25     Repeat on all pages

Left: [ ] [ ]  
 Center: [ ] [ ]  
 Right: [ ] [ ]

Show footers    Footer height: 0.25     Repeat on all pages

Left: Import file name [ Project Falcon.xlsx ]  
 Center: Snapshot date [ Snapshot Date: 11/15/2012 ]  
 Right: Custom 1 [ Created in OnePager® Express ]

OK    Apply    Cancel

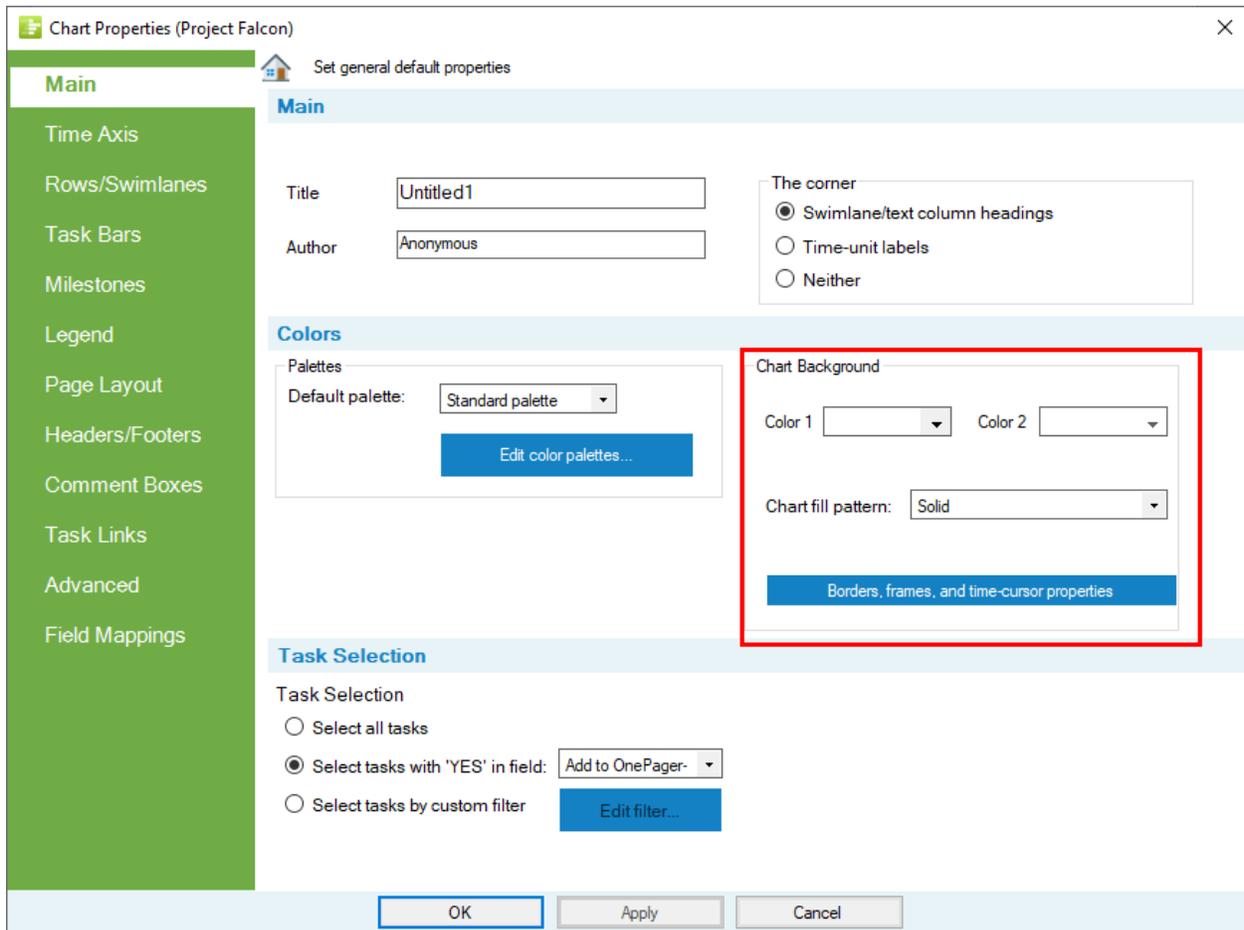
From this same tab, you can control **headers** and **footers** – whether they appear, what text appears in them, and the font/font size/font color of this text.

Hit **OK** or **Apply** to implement your changes.

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## 17. Changing Background Colors and Striping the Background

Click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Main** tab. The **Chart Background** section at the top right of this menu allows you to choose 1-2 colors for the background of your Gantt chart. There are also 7 different fill patterns available, including options for alternating colors between adjacent rows or swimlanes. Hit **OK** or **Apply** to implement your changes.



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## POINT AND CLICK FORMATTING

### 18. Warning About Point and Click Formatting

Whenever possible, we recommend formatting your Gantt chart from the **Chart Properties** form. Changes made in Chart Properties apply to **all** tasks/milestones, and are much easier to standardize into templates later. By contrast, changes made using point-and-click formatting will generally only apply to the task bars and milestones you select. While convenient in some cases, this point-and-click formatting is never saved to the Chart Properties (because it is not applied globally). Therefore, if you ever decide to make a template from your chart (see [#40](#) below), the changes you made using point-and-click formatting will not be passed to your template, and you will have to redo those changes when you use that template to make a new chart. By contrast, any changes you make through Chart Properties can be saved to a template for future use with different project plans, because these settings are not tied to specific tasks and milestones.

For example: If you want all task bars that are 0-50% complete to be colored red, the most efficient approach is to open Chart Properties and set a conditional formatting rule (see [#23](#) below). You can also individually select the task bars you want colored red and color them, but this is less efficient, because those color changes are never saved to the Chart Properties and are only applied to the specific tasks you selected by hand.

We recommend you use point-and-click formatting to make changes that you intend to apply to only one task bar or milestone, or to only a small group of elements that cannot be identified in the Chart Properties form. Rest assured that all point-and-click changes are saved with your Chart, even though they are not saved to the global Chart Properties.

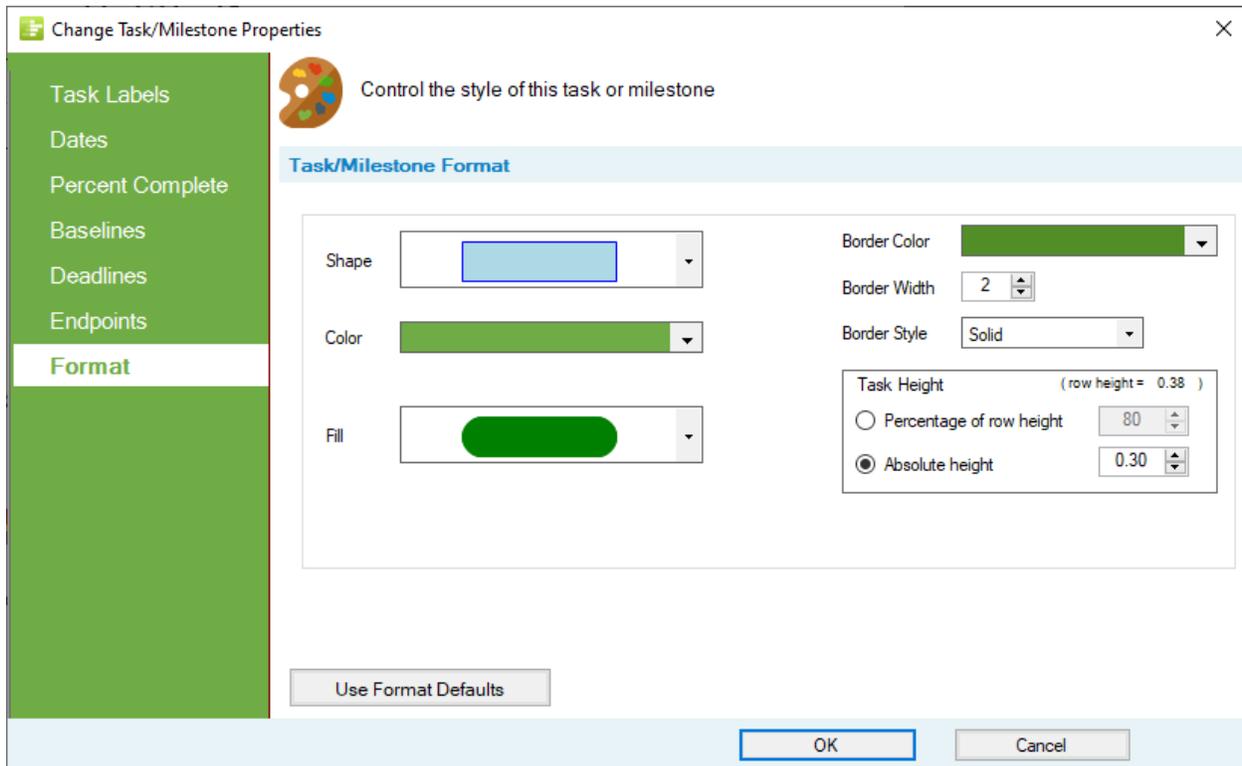
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### 19. Modifying the Appearance of an Individual Task Bar/Milestone

Please first read the **Warning** in [#18](#) above. If you are sure you want to reformat a task bar/milestone outside of Chart Properties, continue reading.

**Right-click** on the task bar/milestone you want to modify and go to the **Format...** menu. From this menu, you can change its shape or color, change its height, modify the font and position of its label, and much more. To add or remove date labels, go to the **Dates** tab. To add or remove decorations such as percent complete or baselines, go to the **Percent Complete** or **Baselines** tab, as appropriate. Click **OK** to implement your changes.

You can also modify the position of a task label by **left-clicking** on a task bar/milestone and then using the **Label Position** dropdown on the right-hand side of the **Home** tab of the ribbon.



To reformat multiple task bars/milestones at once (but not **all** task bars/milestones – see [#10](#) above for a better way to do that), hold down the **CTRL** key while **left-clicking** on them. Then **right-click** and follow the instructions above.

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## 20. Changing the Location of an Individual Task Bar/Milestone

You can move task bars/milestones up or down in your Gantt chart – **not side to side**, as this would change the start/finish dates of your task bars/milestones and break the fidelity of your chart to the data in Microsoft Excel. Moving up or down can be accomplished either with the mouse or the keyboard. Note that the task bar/milestone will always “snap” to the row that contains it.

To move using the mouse, **left-click** the task bar/milestone you want to move and **drag** it up or down.

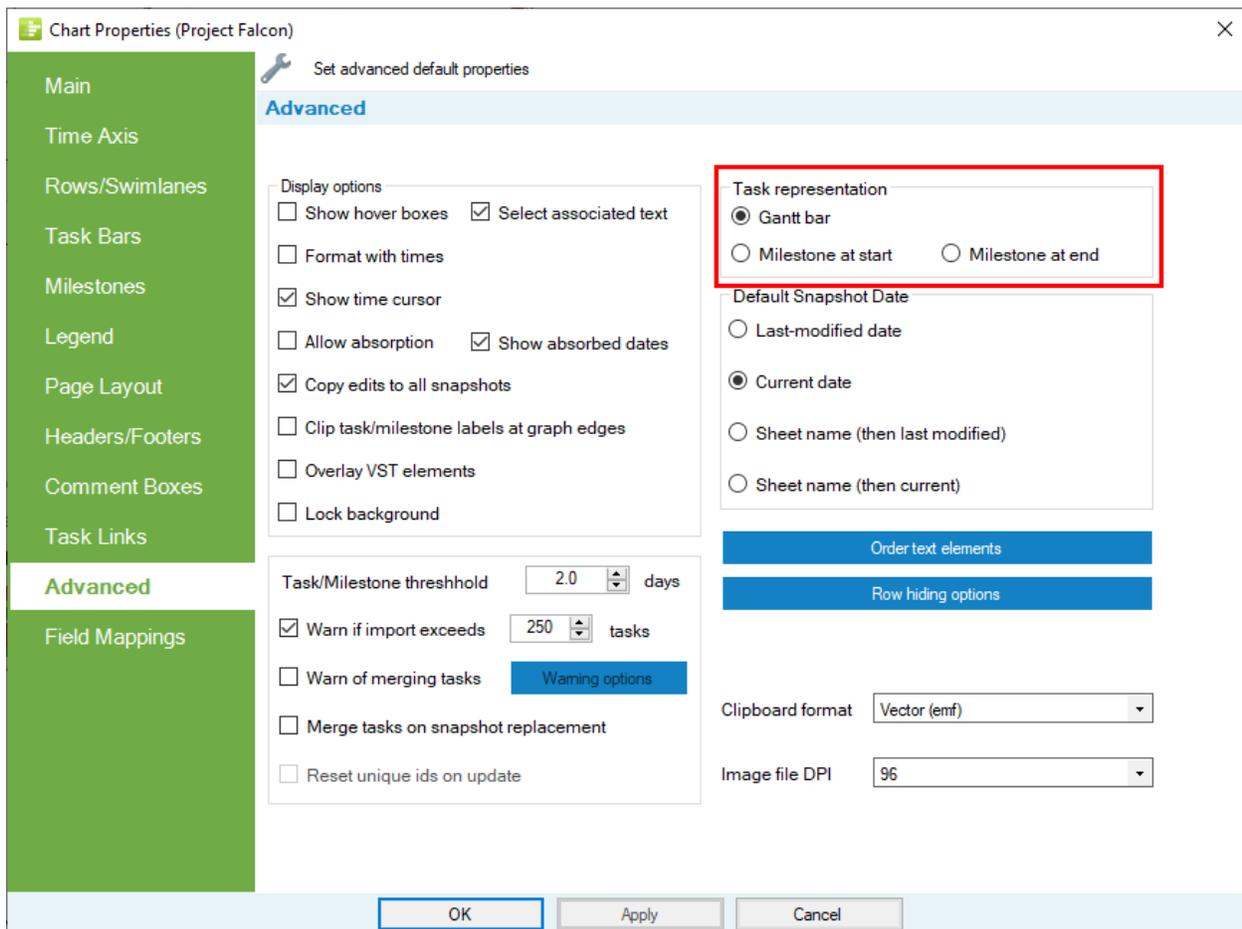
To move using the keyboard, **left-click** the task bar/milestone you want to move and use the **up** or **down arrow keys** to move the shape up or down.

To move multiple task bars/milestones at once, hold down the **CTRL** key while **left-clicking** on them. Then follow the instructions above.

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## 21. Displaying Task Bars as Milestones

If you want to display **all** task bars as milestone symbols, click the **Chart Properties** button from the **Home** ribbon and go to the **Advanced** tab. Change **Task representation** on the right-hand side of this menu from **Gantt bar** to either **Milestone at start** or **Milestone at end**. Hit **OK** or **Apply** to implement your changes.



To change an **individual** task bar to a milestone symbol (see the **warning** on this practice in [#18](#) above), **right-click** on the task bar and choose **Task Representation** from the context menu. Change the selected option to either **As milestone at start** or **As milestone at finish**.

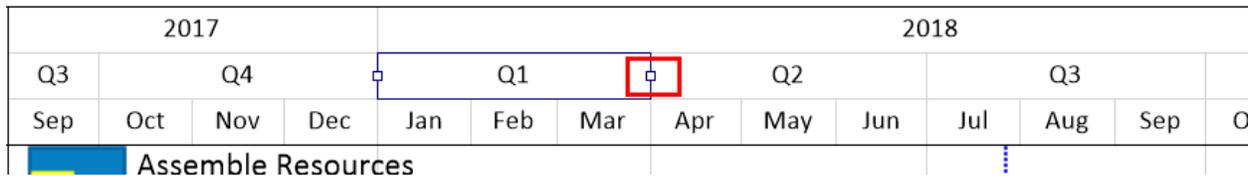
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## 22. Stretching or Hiding Time Axis Cells

OnePager allows you to expand, contract, or even hide cells on your time axis. This is useful for calling out a particular period of time — if many important events happen in the fourth quarter of 2020, you might want to make that quarter display more prominently than the rest of your chart. Conversely, you might want to hide other periods of time that are unimportant.

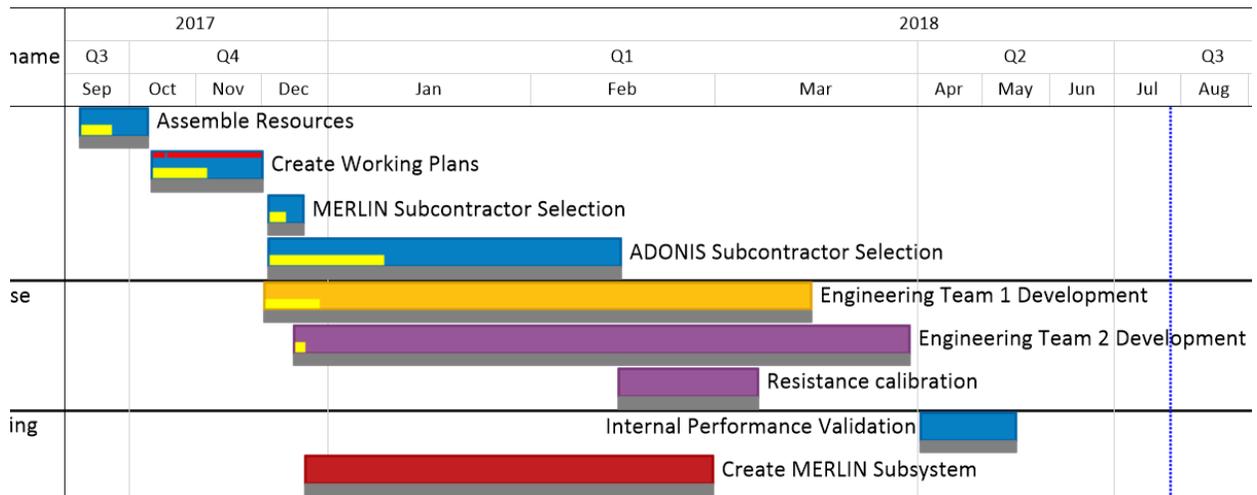
To change the width of a time axis cell, simply **left-click** on it and **drag** the left/right boundaries:

## Bluegrass Project



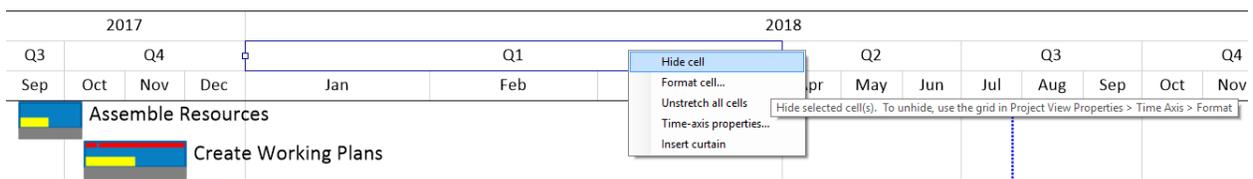
In this example, we've made the tasks and milestones in the first quarter of 2018 appear wider than the others:

## Bluegrass Project



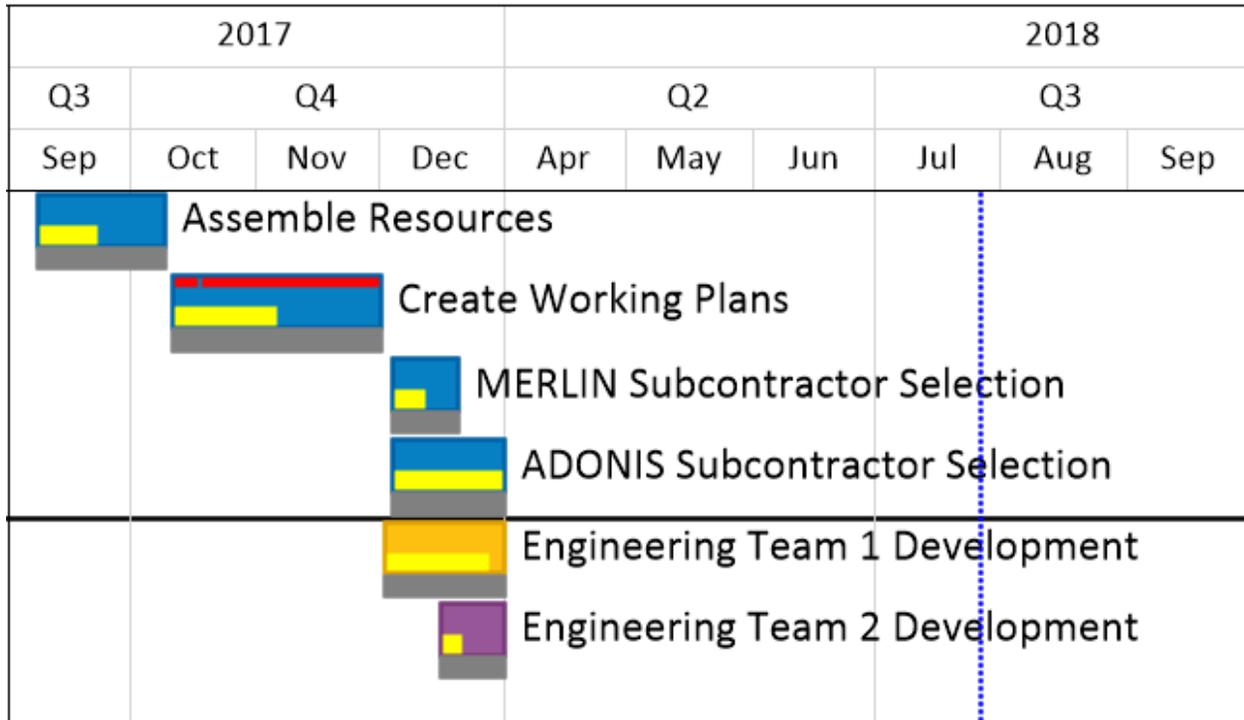
Or, we can just hide this quarter, by **right-clicking** on it and choosing **Hide cell...**

## Bluegrass Project



This omits the first quarter of 2018 from the chart.

# Bluegrass Project



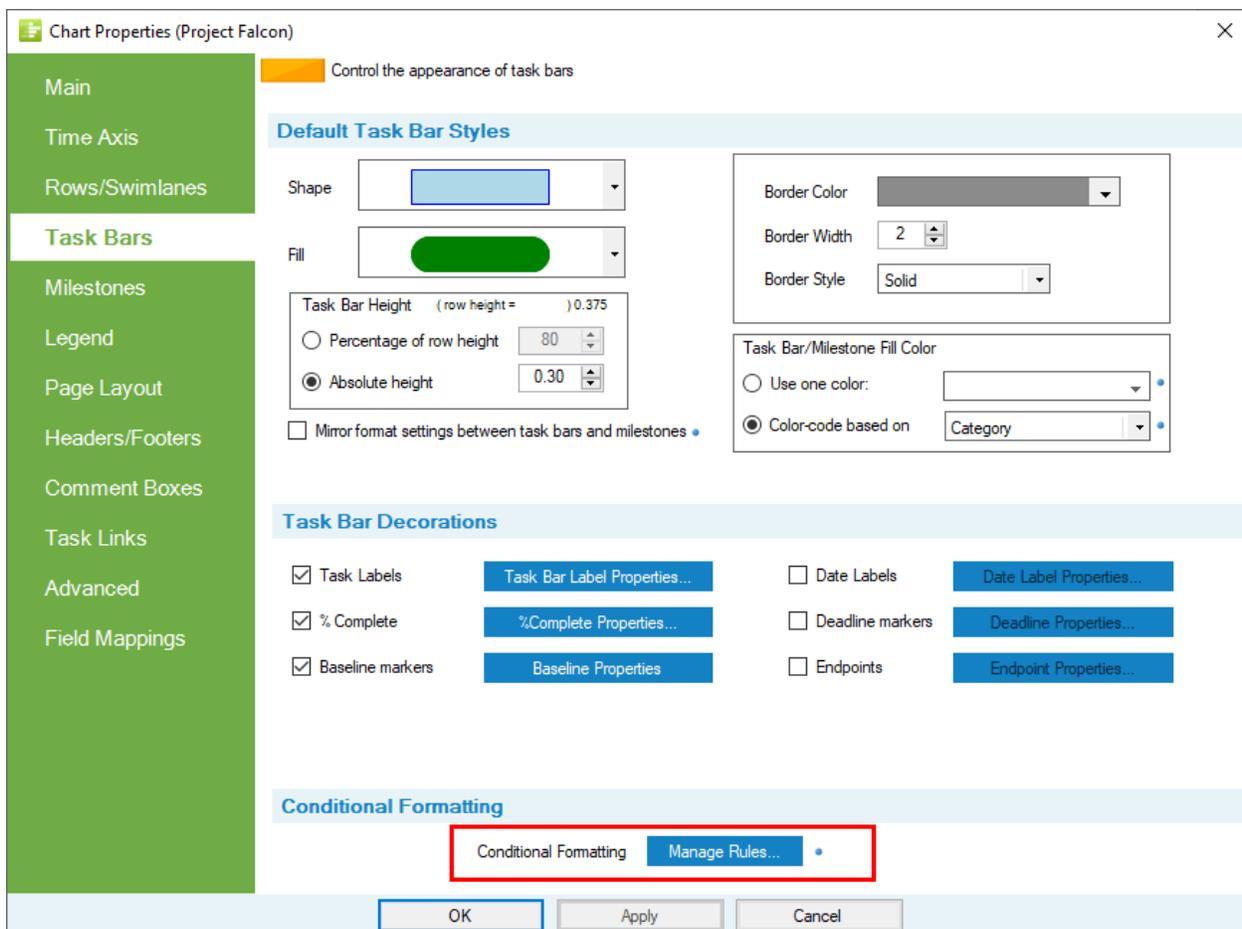
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## CONDITIONAL FORMATTING

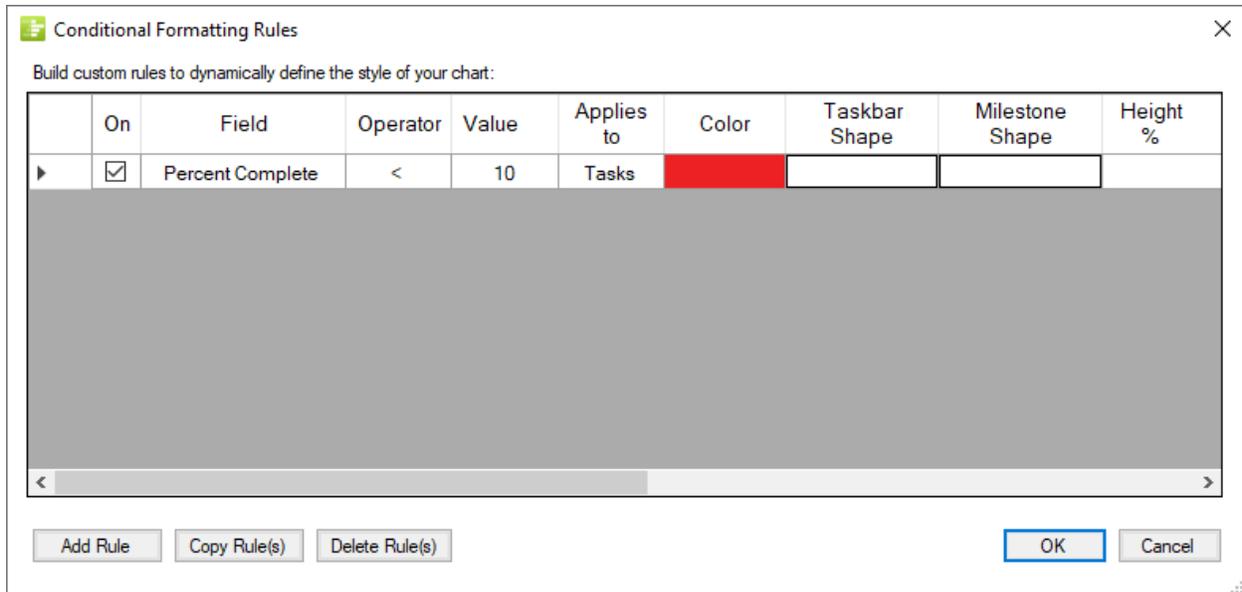
### 23. Setting up Conditional Formatting

OnePager allows you to automatically change the color, shape, and other formatting of task bars and milestones based on the data in your project plan. For example, you could specify that every task less than 10% complete be colored red, that tasks assigned to Bob are shown with a chevron shape, or that task names containing the word “Summary” result in taller task bars than other tasks. This is called **conditional formatting**, and basically it works the same way as it does in Microsoft Excel.

To set a conditional formatting rule, go to either the **Task Bars** or **Milestones** tab of the **Chart Properties** menu. In the Conditional Formatting section at the bottom, click **Manage Rules...** Conditional formatting rules are shared between tasks and milestones, so you can manage them all in one place.



From the dialog box that pops up, you can add a rule by clicking on the **Add Rule** button. In this example, we'll set one of the rules we suggested above – that every task less than 10% complete be colored red:



To apply this rule, we need to hit **OK** twice – once to close the Conditional Formatting Rules form, and once to close the Chart Properties form.

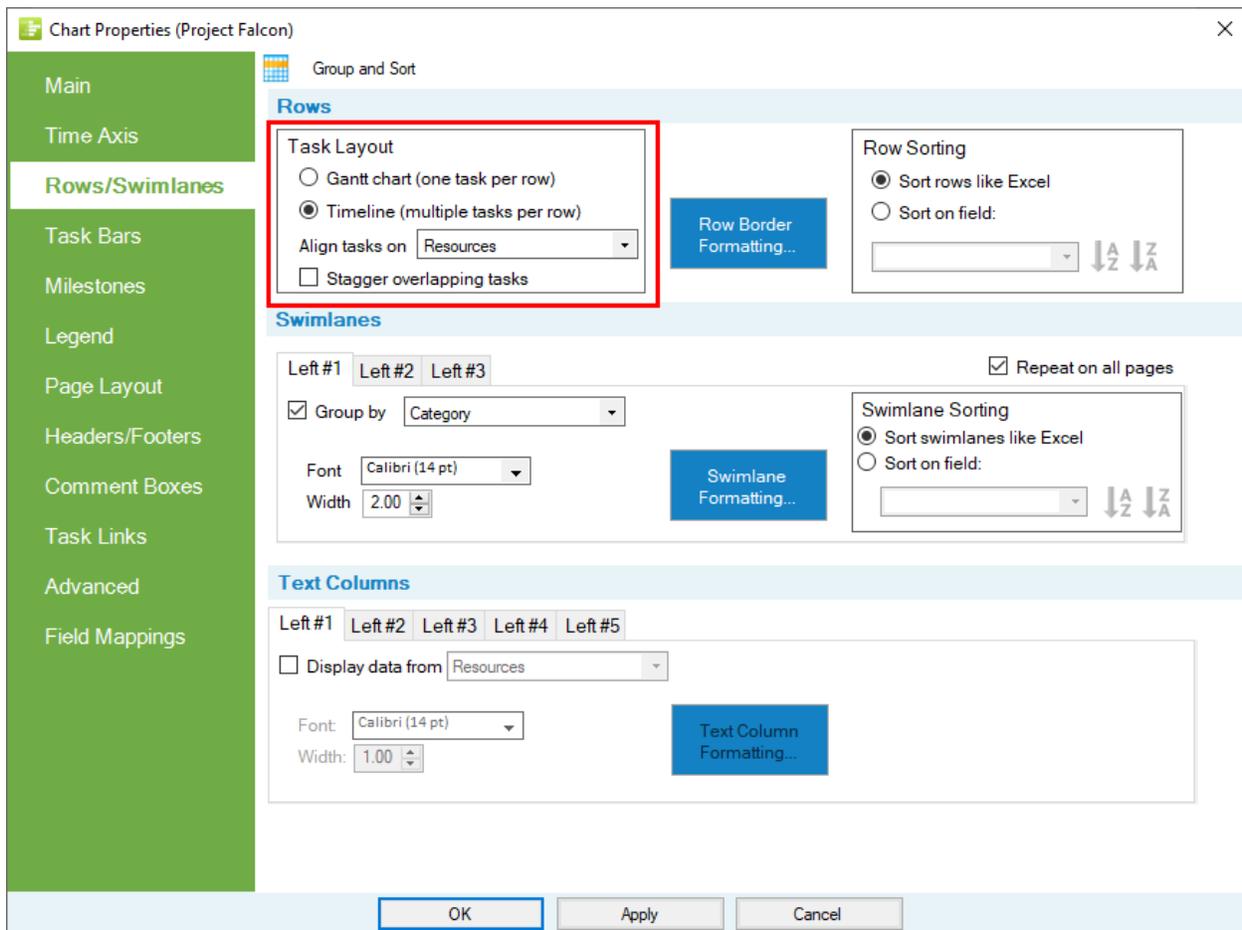
The conditional formatting rule we've set will now be applied to our chart, and will be reevaluated every time we update the chart with a new snapshot. So if a task changes from 5% complete in one snapshot to 15% complete in another snapshot, its color will change in the second snapshot from red to whatever color it would otherwise be assigned. Cool, right?

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## GROUPING, SORTING, AND COLLECTING

### 24. Collecting Task Bars/Milestones into Rows

By default, OnePager puts each task bar or milestone into its own horizontal row. This is called **Gantt chart** mode. If you want to collect multiple task bars/milestones into the same row, click the **Chart Properties** button on the **Home** ribbon and go to the **Rows/Swimlanes** tab. Select **Timeline (multiple tasks per row)** and then select the field that will drive task collection. For instance, in the screenshot below, if you choose to **Align tasks on Resources**, then each unique value of Resource will get its own row, with multiple tasks/milestones therein.



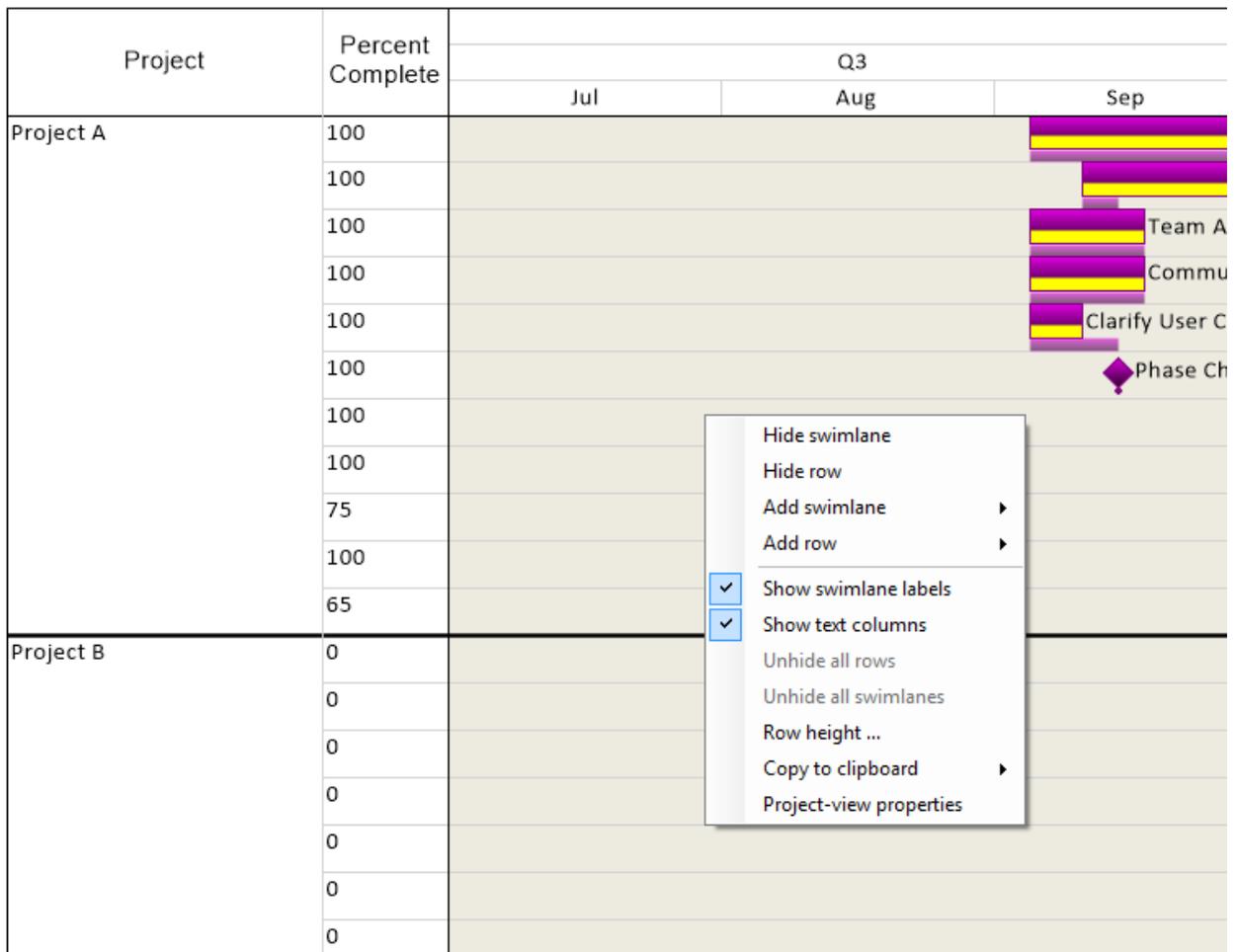
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### 25. Grouping Rows into Swimlanes

A **swimlane** is a collection of rows. OnePager allows you to define up to three levels of swimlanes, though for basic purposes one is generally sufficient. In the example screenshot below, tasks are grouped into swimlanes by Category, and rows are labelled by Resources.

Most users set swimlanes in their reports to Phase, Subproject, Department, Status, or other easily identifiable groupings.

To group your tasks into swimlanes, click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in [#24](#) above). Turn on the checkbox for **Group by...** and select a Microsoft Excel field from the dropdown list. By default, you will modify the “Left #1” swimlane grouping; the “Left #2” and “Left #3” tabs are for additional swimlanes if you need them. Hit **OK** or **Apply** to implement your changes.



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## 26. Adding Multiple Text Columns to Label Rows

OnePager allows you to display up to eight columns of text to the left of your Gantt chart: three swimlane labels, and up to five **Text Columns** meant to correspond to the row. In the example chart below, all eight columns have been turned on, with the three swimlane labels on the far

left in gray. This maximizes your ability to display helpful text information alongside your graphics.



Untitled1

Category	Resources	Percent Complete	Start Date	End Date	Baseline Start	Baseline End	ID	3Q 2012		
								Sep	Oct	
Inception	Engineering Team	100	9/11/12	9/29/12	9/11/12	9/15/12	3		Update Sizings	
	Management Team	100	9/5/12	9/18/12	9/5/12	9/18/12	4		Team Alignment	
	Sales Team	100	9/5/12	9/29/12	9/5/12	9/29/12	2			
			9/5/12	9/18/12	9/5/12	9/18/12	5		Communication Plan	
			9/5/12	9/11/12	9/5/12	9/15/12	6		Clarify User Cases	
			9/15/12	9/15/12	9/15/12	9/15/12	7		Phase Checkpoint - 2	
	Design	Engineering Team	100	10/2/12	10/13/12	10/2/12	10/7/12	9		Write FRD
10/2/12				10/13/12	10/2/12	10/5/12	10		Inception	
		75		10/2/12	10/13/12	10/2/12	10/13/12	11		Develop BRD
Sales Team		65	10/2/12	10/13/12	10/2/12	10/13/12	11		Work Back Sc	
			10/16/12	10/20/12	10/16/12	10/20/12	13		Docume	
Construction	Engineering Team	0	11/2/12	1/15/13	11/2/12	11/15/12	17		Platform Developme	
			1/1/13	1/30/13	1/1/13	1/30/13	18			
			11/24/12	12/7/12	11/24/12	12/7/12	19			
			12/8/12	12/11/12	12/8/12	12/11/12	20			
Transition	Project Management Team	0	1/4/13	1/10/13	1/4/13	1/10/13	24			
	Sales Team	0	1/11/13	1/17/13	1/11/13	1/17/13	25			
			2/18/13	2/24/13	2/18/13	2/24/13	26			

Project Falcon.xlsx

Snapshot Date: 11/15/2012

To enable Text Columns, click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in [#24](#) above). In the **Text Columns** section, check **Display data from** and select a column from your source file.

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## 27. Changing Swimlane Labels or Text Columns

**Double-click** on any text column or swimlane label (i.e. "Inception") to change it, then hit **OK** to implement your changes. Changes to these labels will not impact your underlying Microsoft Excel data, but we will save them in the chart so your labels stay intact for future updates. Because these changes are made outside of Chart Properties, they will not be saved to any templates you create from this chart (see [#18](#) above for more detail).

If you want to completely show/hide text column or swimlane labels, right-click on empty space in the Gantt chart and select **Show text columns** or **Show swimlane labels** from the context menu (see screenshot in [#24](#) above).

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## 28. Changing Row/Swimlane Borders

Click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in [#24](#) above). The **Row Border Formatting...** button, or the **Swimlane Formatting...** button (**Swimlane Borders** group) allows you to either completely hide row/swimlane borders or change their color, weight, and dash type. Hit **OK** or **Apply** to implement your changes.

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## 29. Moving Rows/Swimlanes

Just like task bars/milestones, rows/swimlanes can be clicked and dragged up and down with the mouse. **Be sure to click on one of the text columns to move a row, or the swimlane label to move a swimlane**; otherwise, you may move the wrong thing. This means text columns must be turned on in order to move a row; see [#26](#) above on how to show text columns.

**Warning:** Because row/swimlane movements of this kind are made outside of Chart Properties, they will not be saved to any templates you create from this chart (see [#18](#) above). You may want to apply a global ordering rule to your rows/swimlanes instead. To do this, click the **Chart Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in [#24](#)). From the **Row Sorting** or **Swimlane Sorting** groups, you can either order rows/swimlanes as they are ordered in Microsoft Excel, or you can order them according to the Microsoft Excel field of your choosing. Hit **OK** or **Apply** to implement your changes, which **will** be applied to any templates you make from this chart in the future.

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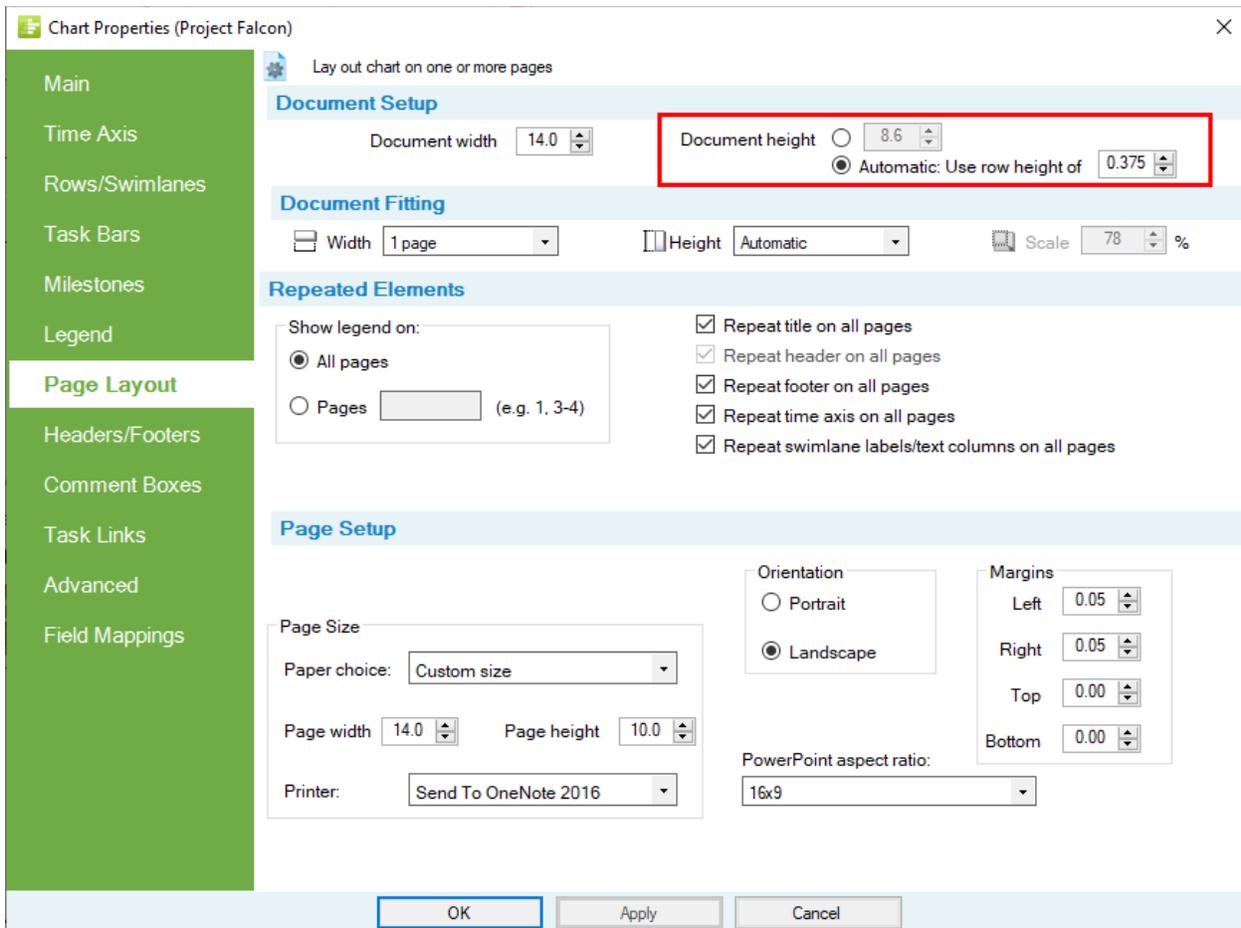
## 30. Changing Row/Swimlane Heights

Rows and swimlanes can be made taller or shorter by selecting a row or swimlane and dragging its handlebars up or down. **Be sure to click on a text column to resize a row, or the swimlane label to resize a swimlane**; otherwise, you may resize the wrong thing. This means text columns must be turned on in order to resize a row; see [#26](#) above on how to show text columns.

To resize multiple rows/swimlanes at once, hold down the **CTRL** key while clicking on them, then follow the instructions above.



If you would prefer to make **all** rows taller or shorter, click on the **Chart Properties** button from the **Home** ribbon and go to the **Page Layout** tab. For **Document height** choose **Automatic: Use row height of** \_\_\_\_, and modify the default row height (inches for U.S. customers, centimeters elsewhere) as needed. Click **OK** or **Apply** to implement your changes.



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### 31. Adding Blank Rows/Swimlanes

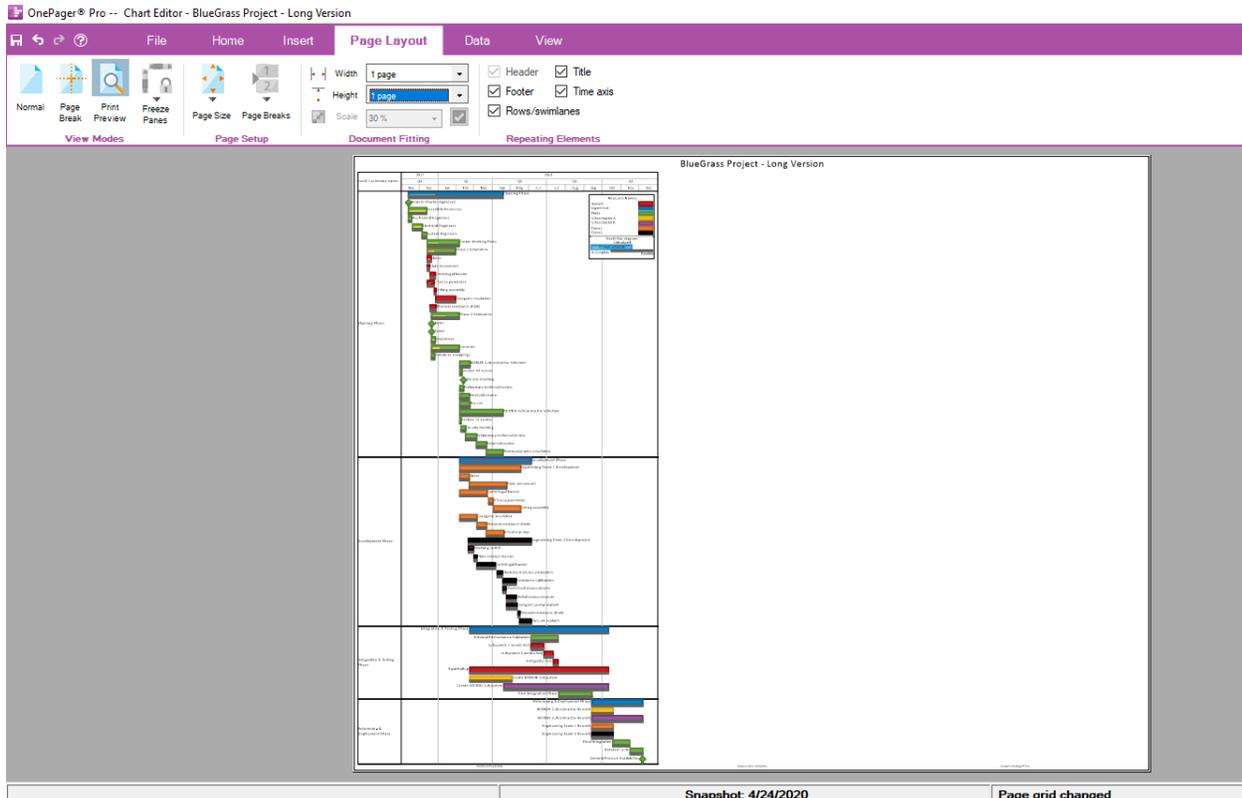
To add a blank row or swimlane to your chart, **right-click** on empty space in your Gantt chart and choose **Add row** or **Add swimlane** (for screenshot, see [#24](#) above). You will be asked whether to add the new row/swimlane **Above** or **Below** the current one.

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## PAGINATION

### 32. Adding/Removing Automatic Page Breaks

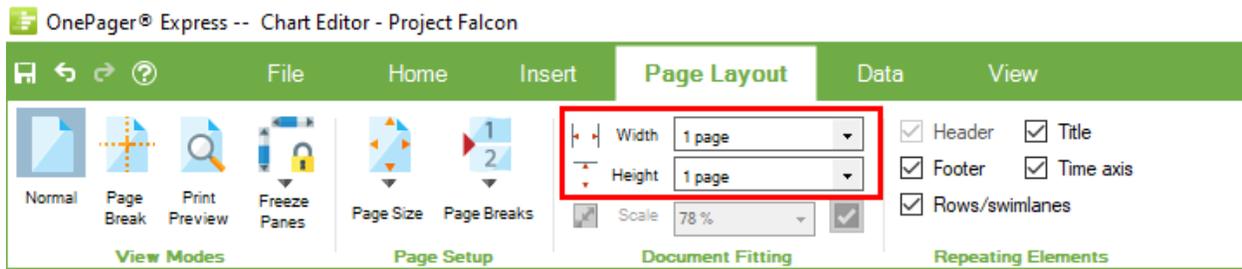
When importing a lot of tasks and milestones, users sometimes see that these long charts are compressed down to a single page and appear very tall and skinny when printed:



The reason this chart appears so narrow is because it is being fit by the printer to a single page. The longer a chart is, the skinnier it has to get in order to scale itself down to a single piece of paper.

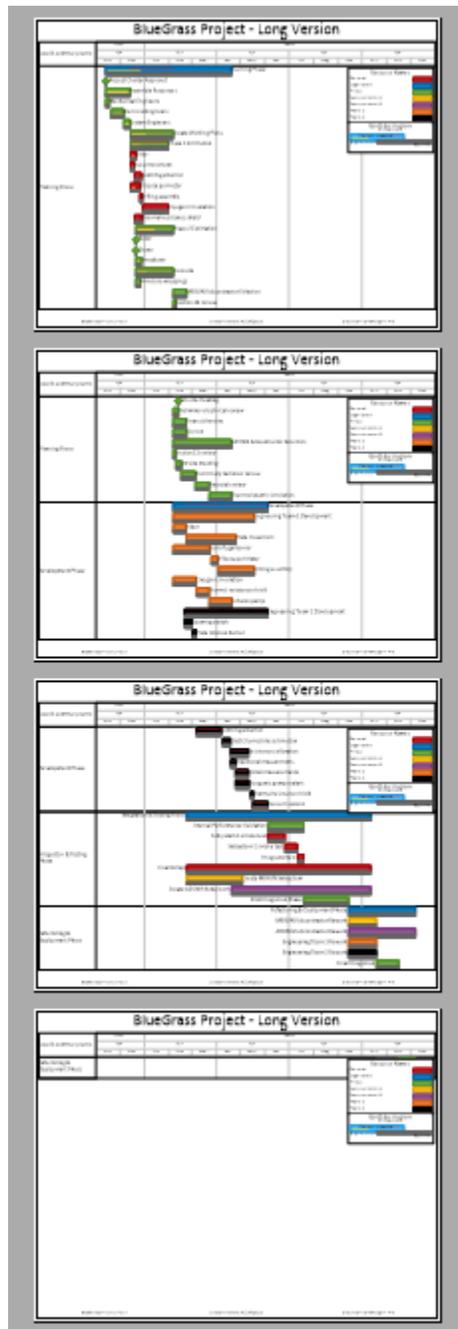
If your chart is too long to fit on a single page without looking like this, the best solution is to allow the chart to print on multiple pages. OnePager has a setting that automatically inserts page breaks and does a "best fit" across multiple pages for longer charts. Here's how:

- (a) Click on the **Page Layout** tab on the ribbon and locate the **Width** and **Height** controls in the **Document Fitting** panel:



By default, your document is set to print 1 page wide by 1 page tall, which is why if you look at the **Scale**, you will see a very small number like 30%. This means that the document has been reduced to 30% of its original size to fit vertically on a single page.

- (b) When you have lots of tasks, it's best to allow OnePager to automatically fit the document to as many pages as necessary. Change the **Height** setting from **1 page** to **Automatic**.
- (c) Now, click on **Print Preview** (also on the **Page Layout** tab, third button from the left) and you will see that the chart now spans multiple pages at nearly full size, making it much easier to read.



From here, you can print all pages at once, or copy them to PowerPoint as individual slides (on the **Home** tab, click the down-pointing arrow underneath **Copy** to select individual pages).

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### 33. Adding/Removing Manual Page Breaks

OnePager also allows you to add manual page breaks to a chart. From the **Page Layout** tab on the ribbon, click the **Page Breaks** button and choose **Insert vertical page break** – to insert a **horizontal line** that divides the chart vertically – or **Insert horizontal page break**, to insert a **vertical line** that divides the chart horizontally. Drag the page break to the desired position and **left-click** the mouse to set it. To remove manually inserted page breaks, return to the **Page Breaks** dropdown and choose **Remove all inserted page breaks**.

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### 34. Freezing Panes

Just like in Microsoft Excel, OnePager allows you to freeze either the top, bottom, or left side of your chart, so those elements are still visible as you scroll down or to the right. To freeze the top time axis, go to the **Page Layout** tab on the ribbon, select the **Freeze Panes** dropdown, and choose **Freeze top time axis**. (If you have a bottom time axis, you can freeze it in the same way.) To freeze row and swimlane labels, go to the same dropdown and choose **Freeze row and swimlane labels**. Now you can scroll without losing track of where you are!

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## SHARING

### 35. Copying your Chart to PowerPoint

Go to the **Home** tab and click the **Copy** button. You can then paste your Gantt chart as a resizable graphic into PowerPoint or virtually any other application.

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### 36. Printing your Chart

Go to **File** on the ribbon and choose the **Print** tab. You will see a print preview (similar to Microsoft Word). Hitting the **Print** button will bring up the Windows Print screen, where you can select a printer and a page range and print your document.

Hitting the **Settings** button will bring up the **Page Layout** tab of the **Chart Properties** menu. If your chart is only one page wide and one page tall, and you want it that way, you may want to make some small changes to these settings before printing; read more [here](#).

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### 37. Exporting your Chart to an Image File or PDF

Go to **File** on the ribbon and choose the **Export** tab. Under **Send to Image File(s)**, choose an image format; we recommend **PNG**. (If your chart is more than one page wide or tall, you should also decide which pages to export, and adjust the settings under **Page Range** accordingly.) Then, click the button to the left of Send to Image File(s) – indicated in the screenshot below – and Windows Explorer will open, prompting you to save your image file in the location of your choosing.

You can also accomplish this by going to **File > Save As** and choosing the **PNG** file type rather than the **TAM** file type from the **Save as type:** dropdown.

To create a PDF document of your chart, simply click **Send to PDF**, again specifying the page or pages you wish to export.

- ←
- New...
- Open...
- Save
- Save As...
- Update...
- Close
- Options
- Help
- About
- License
- Export**
- Print
- Exit

## Export to Another Format



### Send to PowerPoint

Put your chart into a new PowerPoint presentation



### Send to PDF

Put your chart into a new PDF file



### Send to Microsoft Outlook

Put your chart into a new Outlook e-mail message



### Send to Image File(s) of Type:

PNG ▾

**Page Range**

Entire Document

All Pages

Current Page

Pages:

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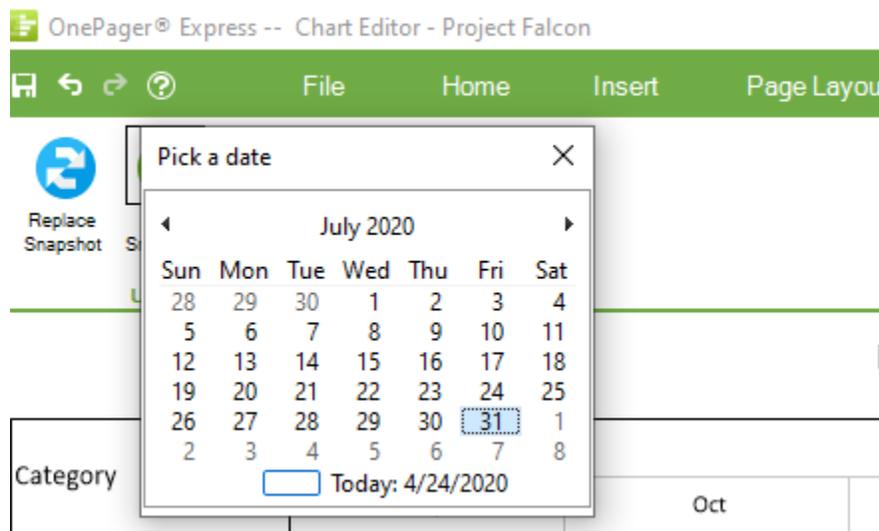
## UPDATING

### 38. Adding a Snapshot

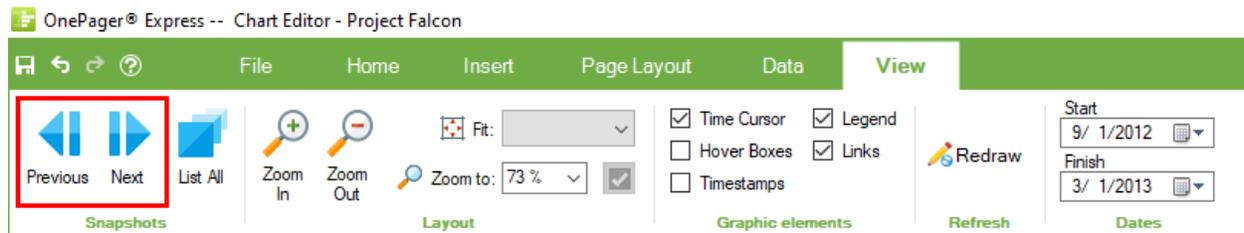
When your project plan changes – start/finish dates move, percent complete values increase – OnePager allows you to add a new **snapshot** to your chart reflecting those updates. Each snapshot is associated with a date, so an individual chart might have one snapshot for October 1, 2020; another snapshot for November 1, 2020; and so forth. Over time, one chart will accumulate a series of snapshots, giving you a periodic audit trail of how your project has changed.

To add a new snapshot to your Gantt chart:

- (a) Make the necessary changes in your Microsoft Excel file.
- (b) Open your OnePager chart, if it is not open already, by double-clicking on the file.
- (c) From the **Data** tab, choose **Add Snapshot**.
- (d) Choose a date for your new snapshot. Finally, click **OK** to create the new snapshot.



Your chart will display with its new snapshot – but you haven’t lost the previous snapshots you made. From the **View** tab of the ribbon, if you hit the **Previous** or **Next** arrows, you can browse through the snapshots you have stored. Or you can click **List All** to see every snapshot, and select the one you want to see. You can also change snapshot dates or even delete snapshots from this List All form.



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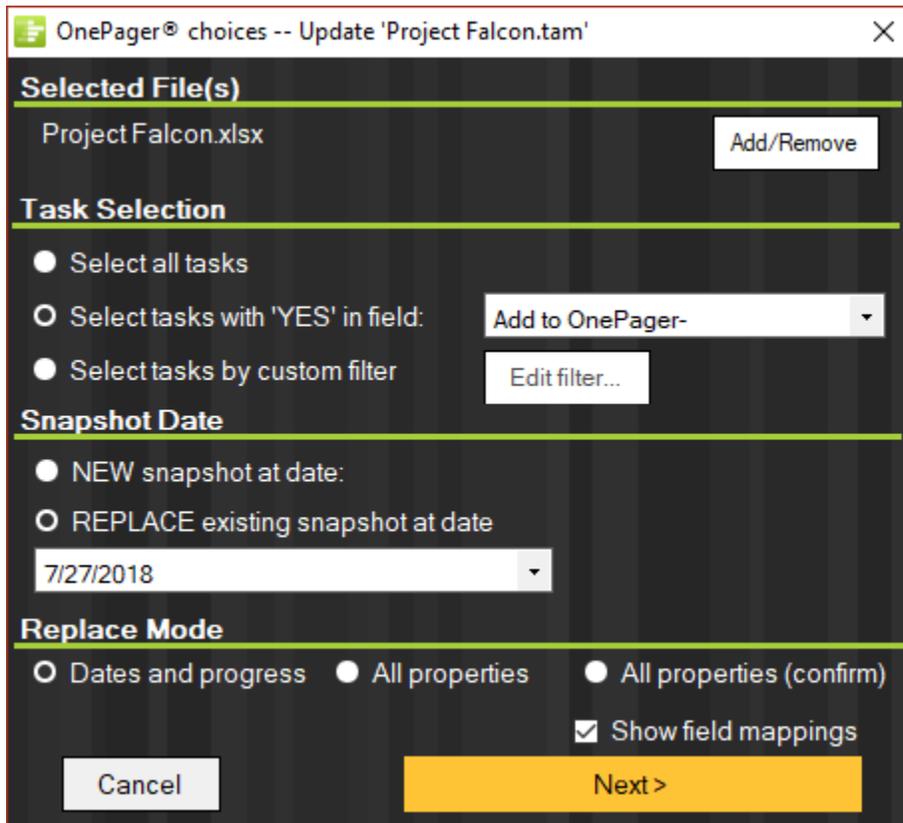
### 39. Replacing a Snapshot

From time to time, you may want to **replace** an existing snapshot, rather than create a new one. For example, you may have just created a new snapshot, but forgot to update a couple of tasks in your Microsoft Excel file or to flag an important task for inclusion. To replace a snapshot:

- (a) Make the necessary changes in your Microsoft Excel file.
- (b) Open your OnePager chart, if it is not open already, by double-clicking on the file.
- (c) From the **Data** tab, choose **Update Custom**.
- (d) The **OnePager Choices** form will appear (screenshot below). First, confirm how (if at all) you will be filtering tasks from your Microsoft Excel file. Second, under **Snapshot Date**, choose **REPLACE existing snapshot at date**, and choose the snapshot you wish to overwrite. By default, we’ll replace your most recent snapshot.
- (e) You now need to choose between three **Replace Modes**.
  - a. **Dates and progress** mode will instruct OnePager to go back to Microsoft Excel and fetch updated start/finish dates, baseline start/finish dates, percent complete values, and refresh any conditional formatting in your chart (e.g., rules set in Chart Properties to color task bars/milestones based on status). This mode works for most users most of the time; use the others only if you are not getting the desired results.
 

**NOTE:** This mode, as well as the other two modes, lets you flag new tasks for inclusion or de-flag existing tasks that you want to omit from the snapshot.
  - b. **All properties** mode will instruct OnePager to refresh all of the properties in (a), **plus** task names and the assignment of tasks to rows/swimlanes. Users most commonly use the All properties mode to resynchronize their OnePager task names with the task names in their Microsoft Excel file, to undo manual name changes made in OnePager.

- c. **All properties (confirm)** does the same thing as All properties, but it will ask you to confirm each change. This mode is rarely used.
- (f) Finally, click the button labeled **Replace dates** or **Replace all properties** (depending on which mode you selected) to generate your revised snapshot.



The screenshot shows a dialog box titled "OnePager® choices -- Update 'Project Falcon.tam'". It is divided into several sections:

- Selected File(s)**: Shows "Project Falcon.xlsx" with an "Add/Remove" button.
- Task Selection**: Includes radio buttons for "Select all tasks", "Select tasks with 'YES' in field:", and "Select tasks by custom filter". There is a dropdown menu for "Add to OnePager-" and an "Edit filter..." button.
- Snapshot Date**: Includes radio buttons for "NEW snapshot at date:" and "REPLACE existing snapshot at date:". A date dropdown menu is set to "7/27/2018".
- Replace Mode**: Includes radio buttons for "Dates and progress", "All properties", and "All properties (confirm)". There is a checked checkbox for "Show field mappings".

At the bottom, there are "Cancel" and "Next >" buttons.

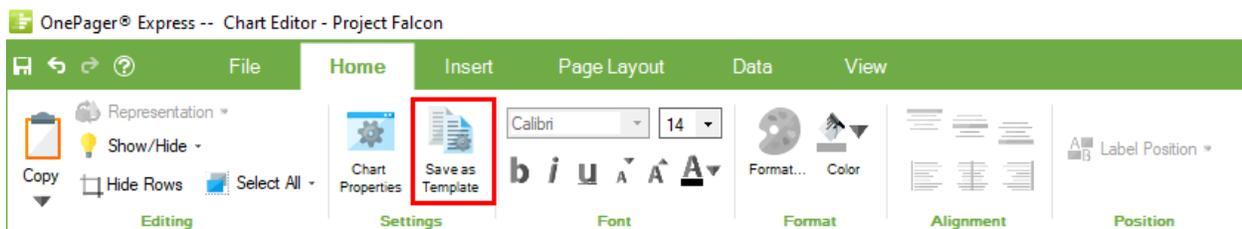
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## TEMPLATES

### 40. Creating a Standard Template to Share with your Team

If your team finds itself creating charts with the same basic format over and over, you can save time by making a common template (or a set of them). That way, no one has to set up formatting by hand.

Start with any existing chart. Once your chart's formatting is just the way you want it, click the **Save as Template** button to the right of the Chart Properties button on the **Home** tab:

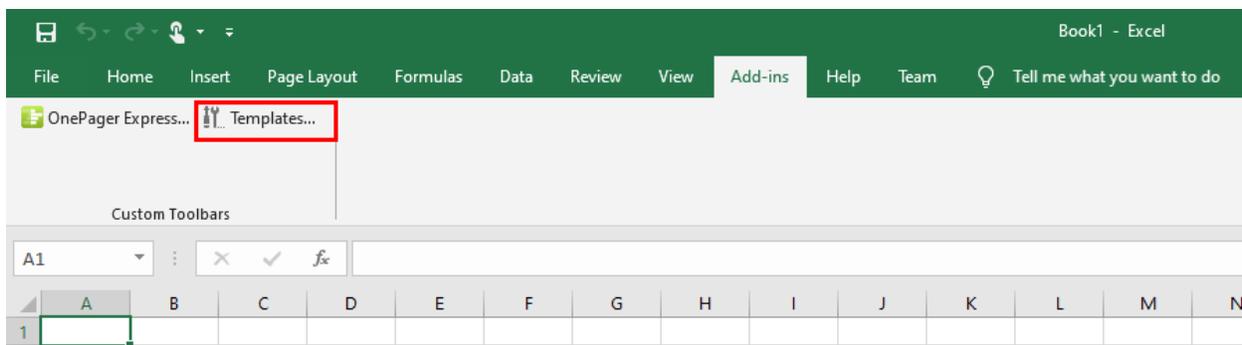


You will be prompted to save your new template in the Templates directory on your file system. Templates are stored as \*.tat files. Templates will consist of your Chart Properties settings, but will not capture any manual point-and-click changes that you made by hand; see [#18](#) above for more on this topic.

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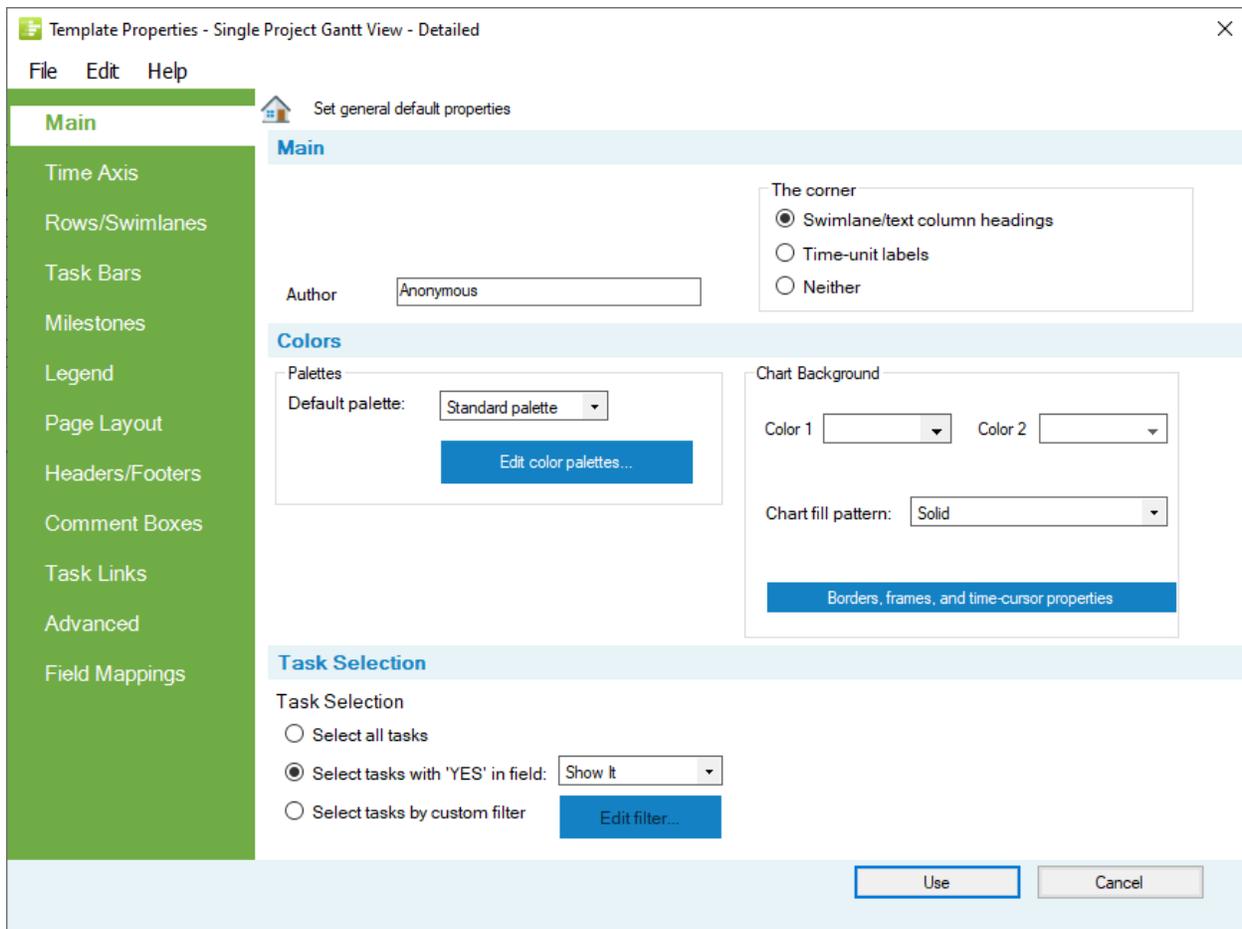
### 41. Editing and Using Templates

To edit a template, **open Microsoft Excel**, click **Add-Ins** on the ribbon, and click the **Templates...** button next to the OnePager Express button.



The tabs on the template menu – shown below – are identical to the tabs in the **Chart Properties** form inside OnePager. This is because when you hit the **Save as Template** button

earlier, you basically copied the **Chart Properties** settings from that chart into the menu you see now.

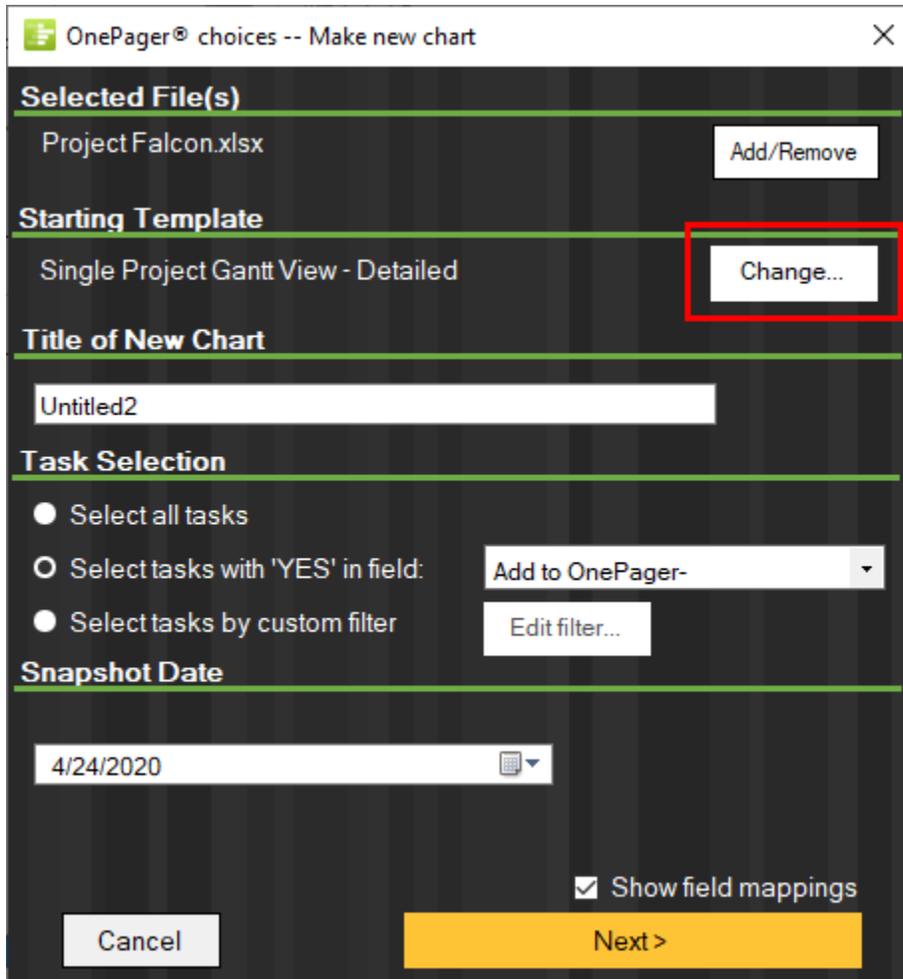


From this Templates menu, you can change the properties of future charts that you create from this template. For example, if you want tasks to always be aligned into rows by “Resource Names”, you can specify that in the **Rows/Swimlanes** tab, and then **click Save and Use** at the bottom to save your changes.

To use your template, simply launch OnePager as normal, and from the **Start** screen choose **New** to create a new chart. Unless you specify otherwise, OnePager will make this new chart using the template you last created or edited. That means all the chart properties you copied into your template will be applied to this brand-new chart.

You can change which template new charts are based upon from the **Starting Template** section of the **OnePager Choices Form** (screenshot below). Hit **Change...** and you will be prompted to load either a recently modified template, or to browse your file system for some other template. You can also choose the permanent, read-only template (**Single Project – Permanent**) that comes pre-loaded with your installation of OnePager.

**NOTE:** Changes to templates cannot be retroactively applied to existing charts. Once a chart has been created from its “parent” template, it is completely independent of all templates.

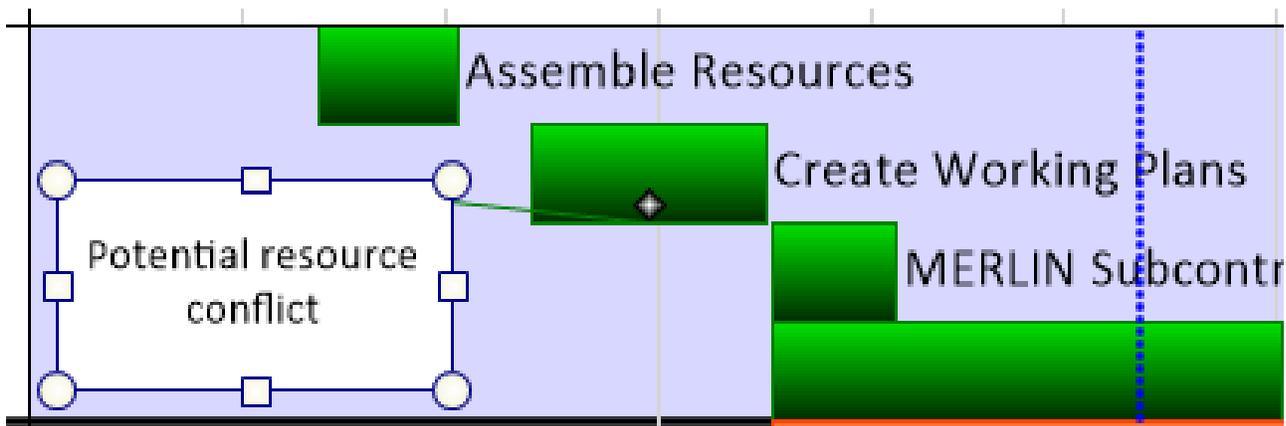
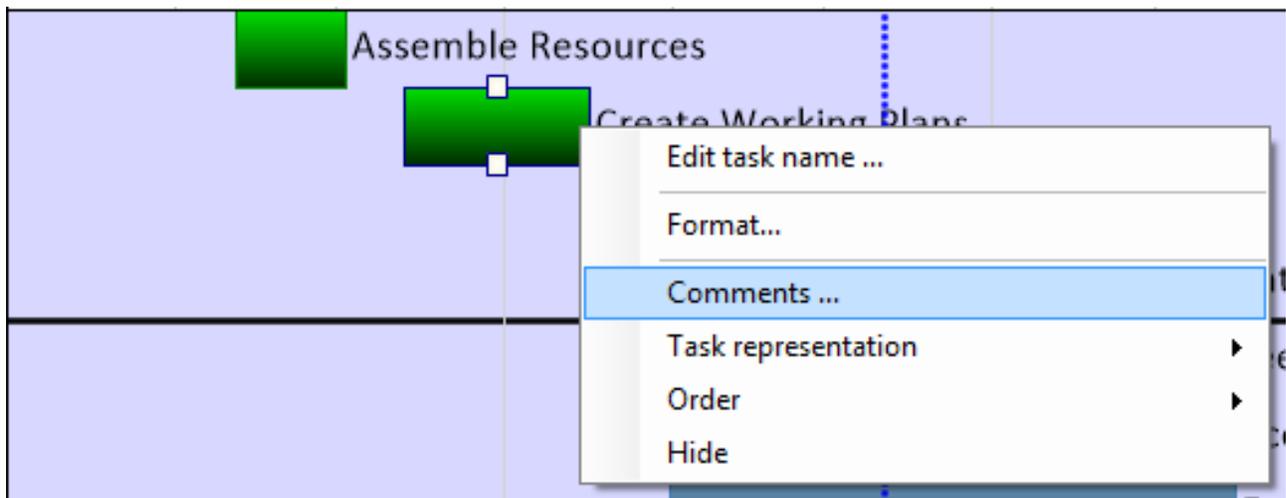


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## INSERTING ADDITIONAL VISUAL ELEMENTS

### 42. Adding Comment Boxes

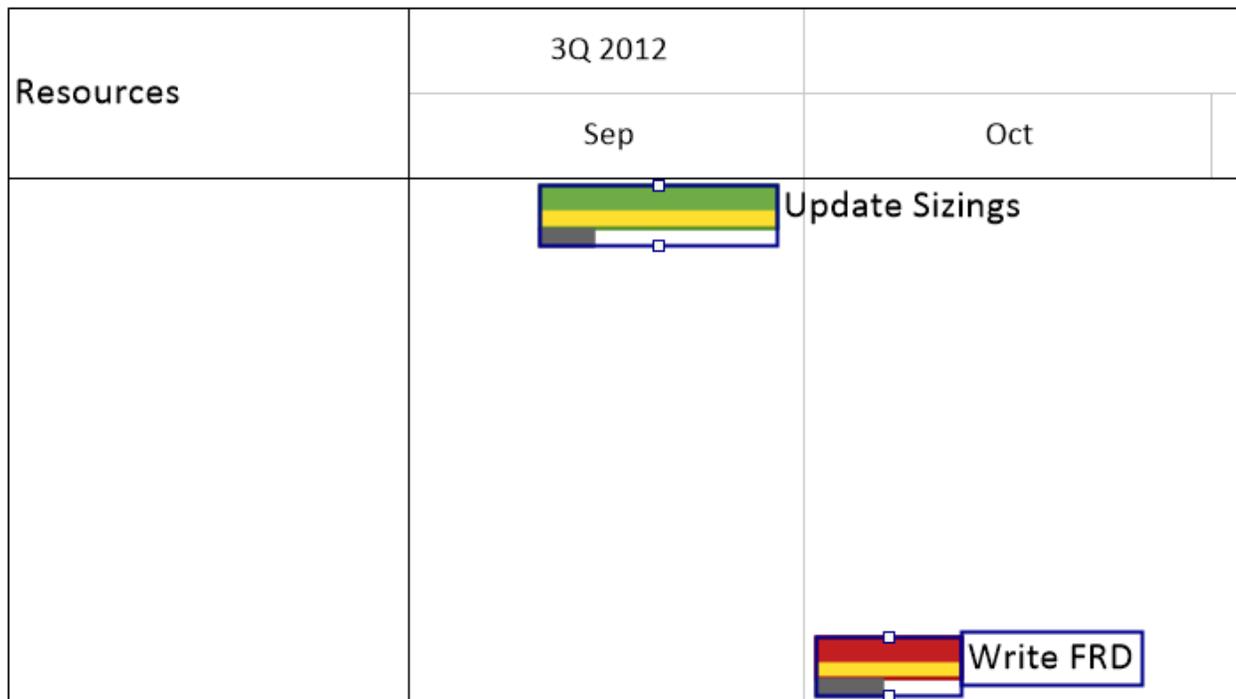
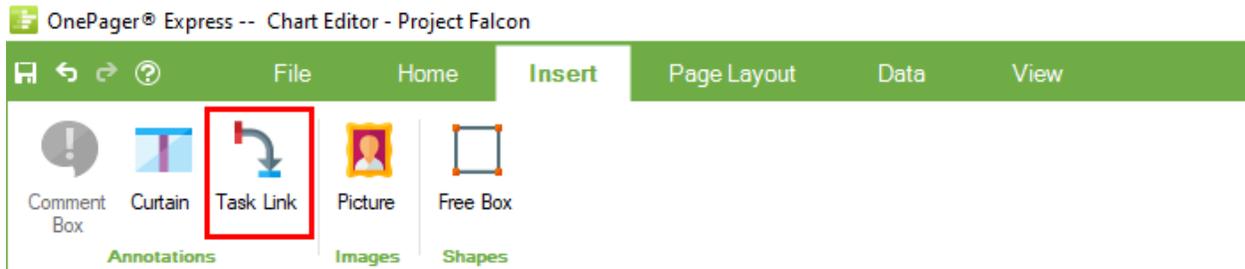
A **comment box** contains free text and can be associated with any task bar or milestone. To add a comment box, **right-click** on the task bar/milestone you want it to be associated with, and choose **Comments....** In the submenu that pops up, type in your text, modify formatting as needed, and click **OK** to make the box.



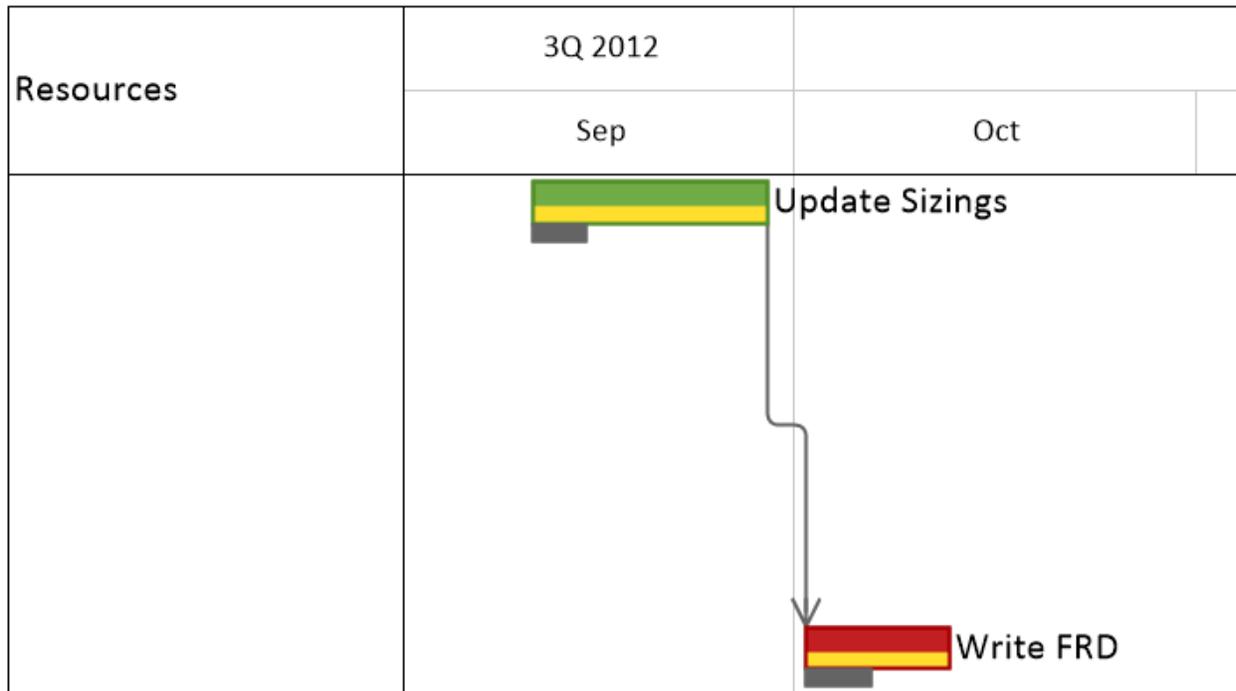
You can drag a comment box around on the screen to reposition it, or drag its handlebars to resize it, just like in PowerPoint. To delete a comment box, **right-click** on it and navigate to **Delete**, either **From this snapshot** or **From all snapshots**.

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### 43. Adding Manual Task Links



To show a dependency between two task bars/milestones, you can add a **task link** (arrow) between them. Holding down the **CTRL** key, **left-click** to select two or more task bars or milestones you want to link. Then, from the **Insert** tab of the ribbon, click **Task Link**. Modify formatting as needed, and click **OK** to draw the link. Once established, links will stay in place through any future updates you make to the same chart.

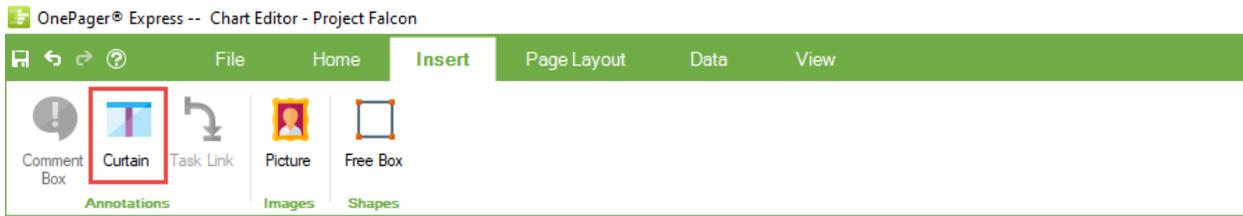


Task links will also be retained as you reposition the linked task bars/milestones on the screen. To delete a task link, **right-click** on it and navigate to **Delete**, either **From this snapshot** or **From all snapshots**.

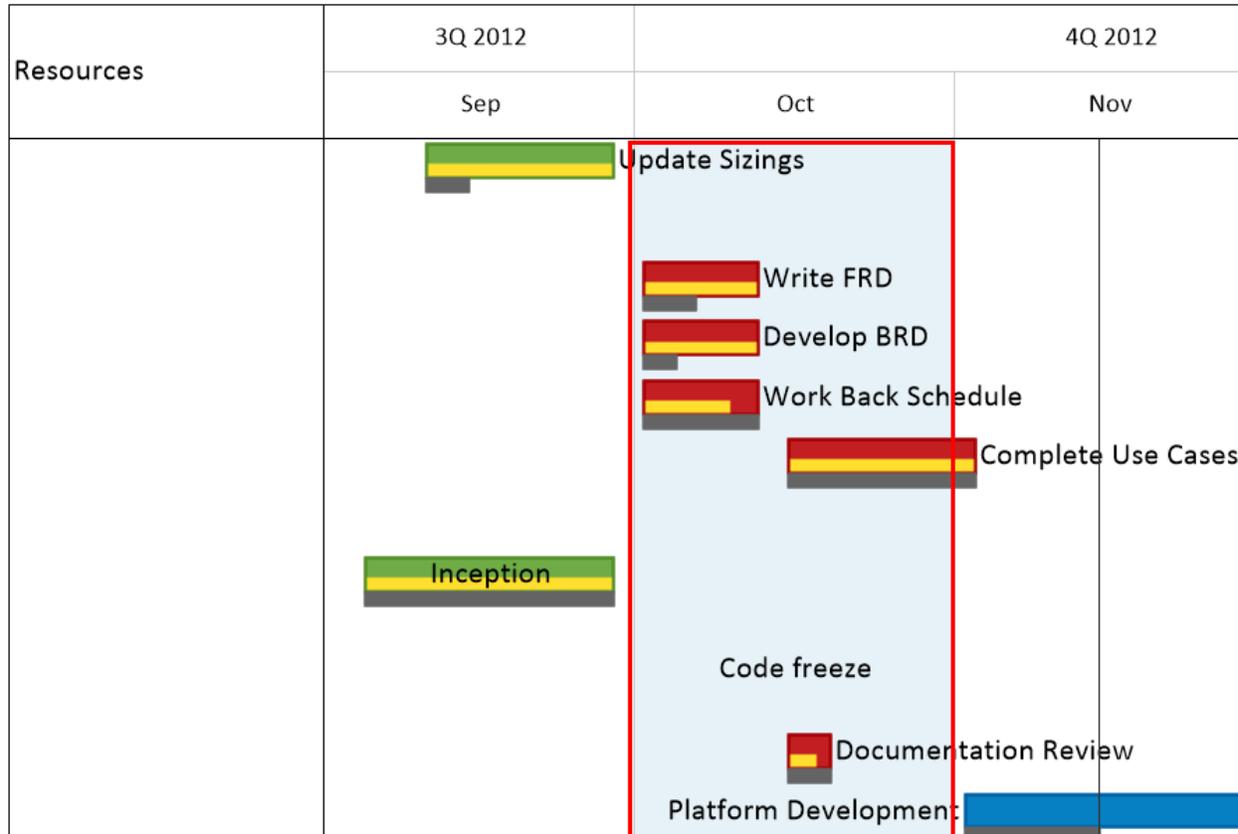
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#### 44. Adding Manual Curtains

A **curtain** is a vertical rectangle on your Gantt chart that shows a period in your project where something is different – i.e., a code freeze or a waiting period.



# Untitled1



To draw a **manual** curtain, from the **Insert** tab of the ribbon, click **Curtain**. Add any text you want to your curtain, modify formatting as needed, and click **OK** to draw the curtain.

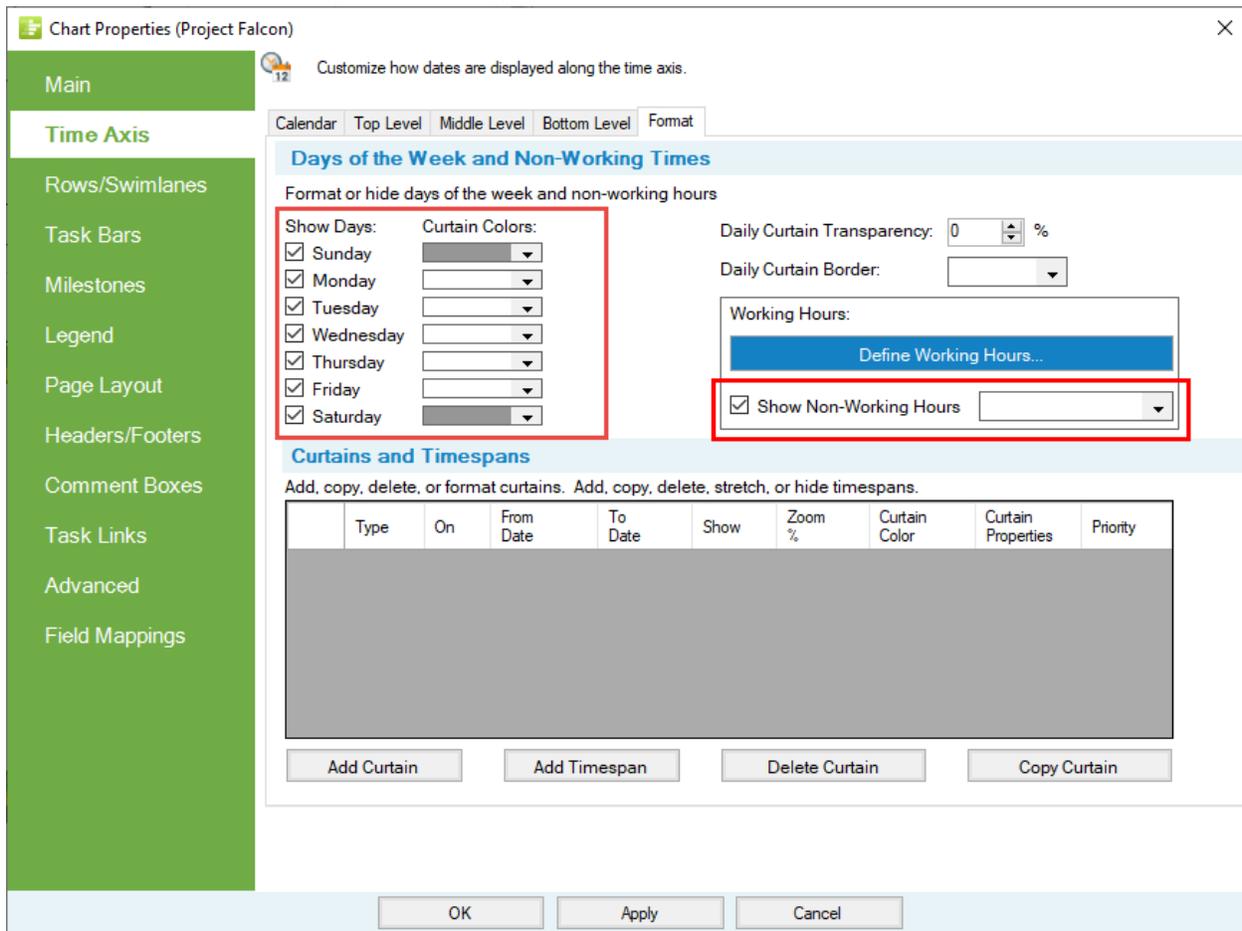
To delete a curtain, **right-click** on it and navigate to **Delete**, either **From this snapshot** or **From all snapshots**. You can also select a curtain and adjust its date boundaries by dragging the handlebars, just as you would resize a text box in PowerPoint.

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## 45. Adding Weekday or Working Hour Curtains

In addition to **manual curtains**, OnePager also allows you to draw **weekday** or **working hour** curtains. For instance, you can color Saturdays and Sundays gray, so that they are less prominent in your chart (since usually less work is scheduled on weekends). Or you can block out time outside business hours, if your team generally doesn't work then.

To add a weekday curtains, go to **Home > Chart Properties > Time Axis > Format** and change the **Curtain Colors** dropdown for the weekdays desired. Here we have Saturday and Sunday colored:



Similarly, if you want non-working hours colored specially, use the dropdown next to the **Show Non-Working Hours** checkbox on this same menu. Your working hours have been defined by default as 8:00am to 5:00pm, Monday-Friday; to change this, click **Define Working Hours...**

It is also possible to *hide* specific weekdays or working hours from this same menu (of course, you cannot hide all seven days of the week). Click **OK** or **Apply** to commit your changes.

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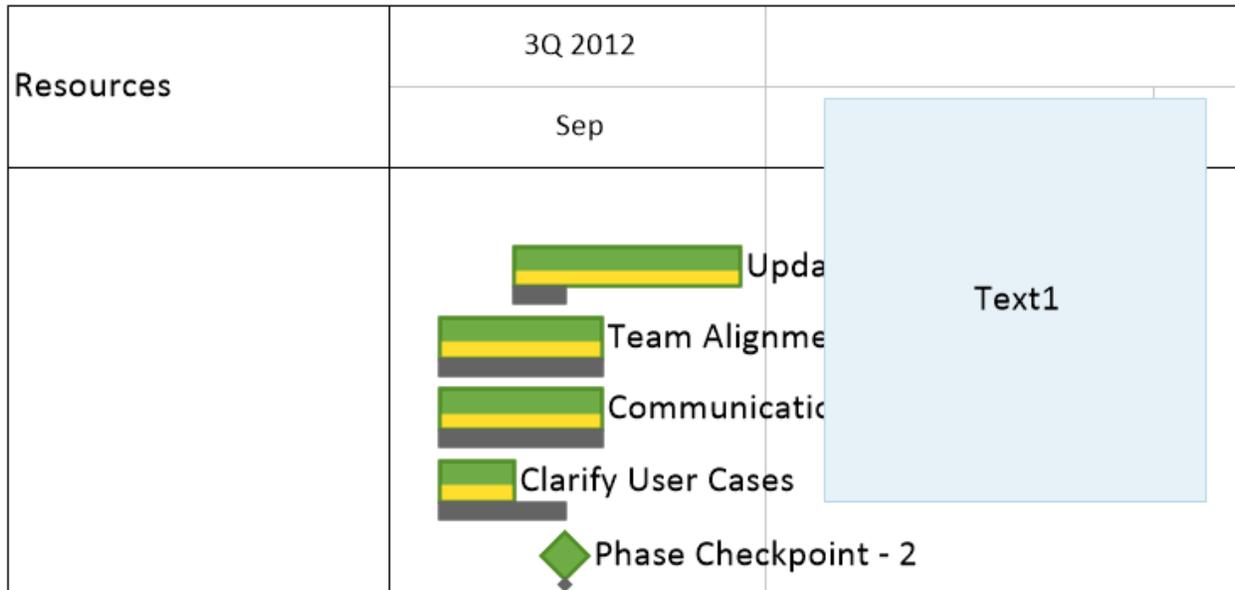
## 46. Adding Text Boxes

OnePager allows you to draw a **free box**, commonly known as a text box, anywhere you want on the screen. Free boxes differ from **comment boxes** (see [#42](#)) in that they are not attached to a task or milestone. You can use them to store project-level comments, legal disclaimers, etc.

To draw a free box, from the **Insert** tab of the ribbon, click **Free Box**. Click and drag the left mouse button to draw your box, and let go of the mouse button to see it on the screen.



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To change “Text1” to your own text (or to delete the text), **right-click** on the box and navigate to **Properties**. Other formatting, such as text alignment, border, and fill color, can also be controlled from the Properties menu.

You can drag a free box around on the screen to reposition it, or drag its handlebars to resize it, just like in PowerPoint. To delete a free box, **right-click** on it and navigate to **Delete**, either **From this snapshot** or **From all snapshots**.

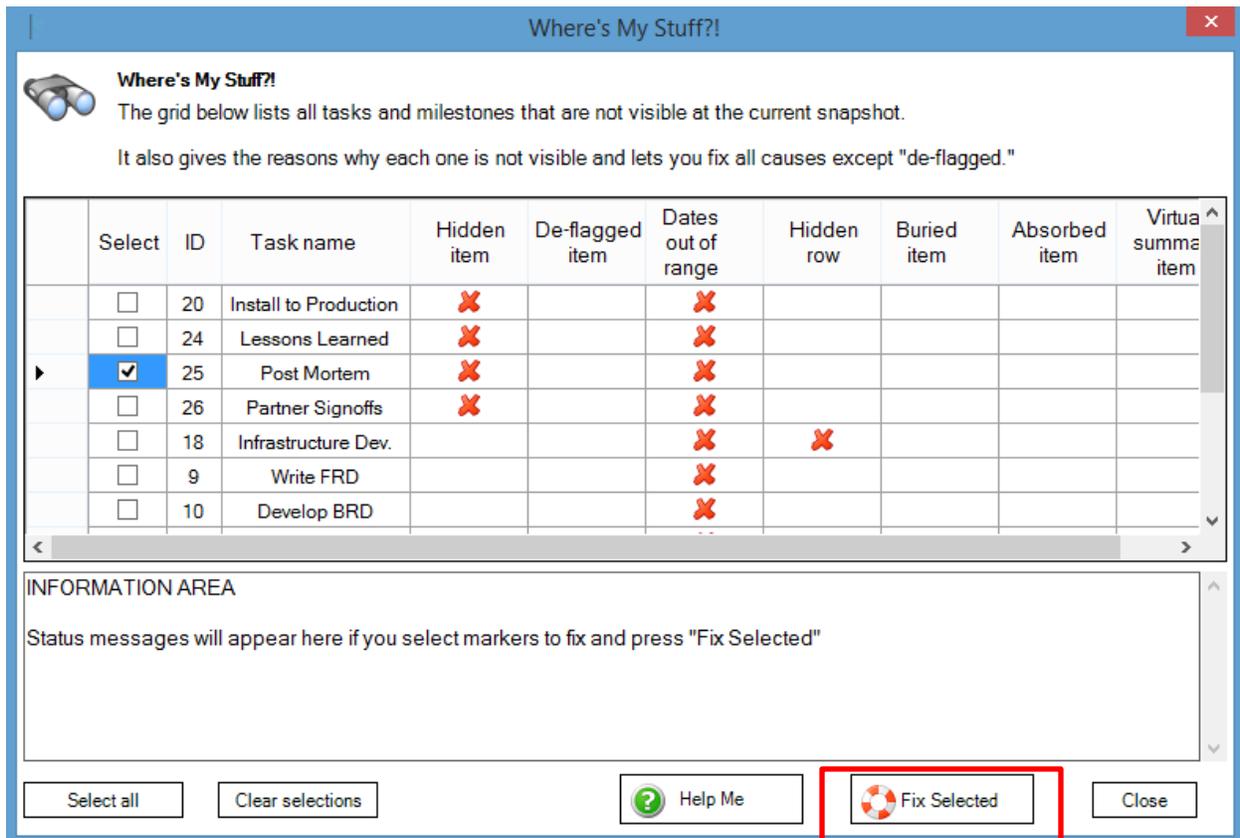
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## TROUBLESHOOTING

### 47. Finding Missing Tasks with Where's My Stuff?!

The “**Where's My Stuff?!**” feature allows you to find tasks that may have inadvertently disappeared from your chart and make them appear again.

The “Where's My Stuff?!” button is located on the **Home** tab of the ribbon, in the **Editing** group, under the **Show/Hide** dropdown menu. Click it, and a dialog box appears.



The form lists every task available to show in the chart that is not currently displaying. A red **X** also indicates the reason each task is not showing. For example, you may have hidden the task, or the row or swimlane to which the task belongs.

To restore one or more missing tasks, use the **Select** checkboxes to select the task or tasks you want returned to the chart, and then click **Fix Selected**. The task will automatically return to the chart – *unless the task was not included in the current snapshot* (more on this below) – and text at the bottom of the dialog box will indicate which tasks were returned.

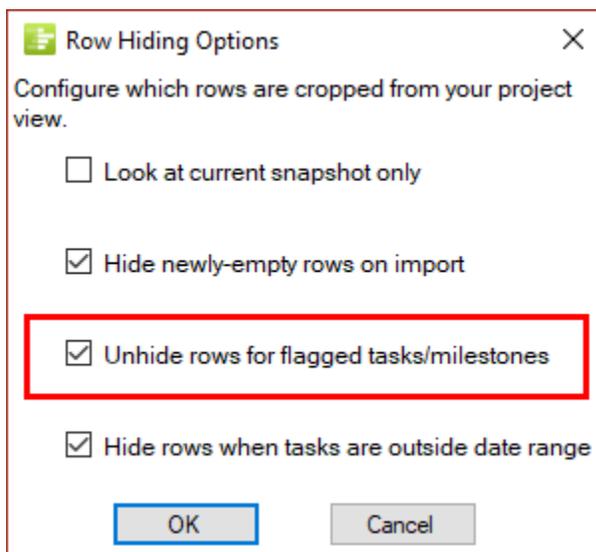
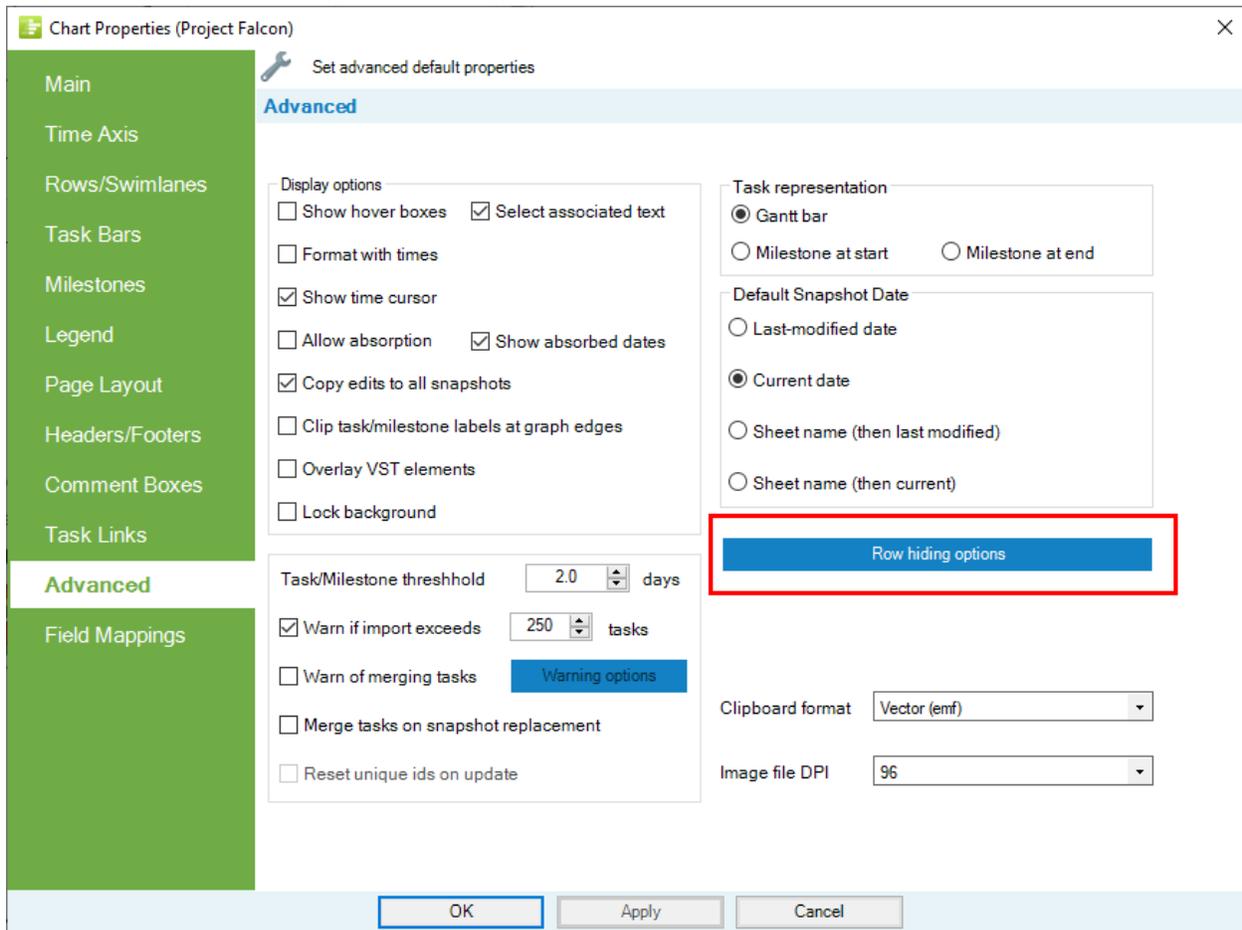
If the task you're looking for does not show up in Where's My Stuff?!. it's likely the task was never flagged in Microsoft Excel to begin with. To change that, simply go to Excel and change the value of the task you want to be visible to "Yes" in the column you're using for filtering. Or, if you are using a custom filter rule, ensure that rule is satisfied by the task in question. Then add a new snapshot to your chart, or replace your current snapshot (see [#38](#) and [#39](#) above), and your task will appear.

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#### **48. Rehiding "Hidden" Rows and Swimlanes that Mysteriously Reappear**

When you hide a row or swimlane by **right-clicking** on its label and choosing **Hide row** or **Hide swimlane**, you also hide all of the task bars or milestones inside that row/swimlane. If, subsequently, the filtering value on one of those tasks gets changed (in Microsoft Excel) from No to Yes, OnePager by design *unhides* the row/swimlane so that the newly flagged task appears.

If this is not what you intend, you can easily suppress this unhiding behavior on the **Advanced** tab of the **Chart Properties** menu (see screenshot below). Click the **Row hiding options** button to bring up the **Row Hiding Options** dialog box. From there, simply uncheck the **Unhide rows for flagged tasks/milestones** option (which is checked by default) and hit **OK** or **Apply**. From now on, hidden rows/swimlanes will always stay hidden, even if the Flag value on one of the tasks/milestones inside those hidden rows/swimlanes changes to Yes.



Note that this setting only applies to **future** snapshots in your chart, meaning you will still need to manually hide any blank rows/swimlanes appearing in your **current** snapshot that you do not want to see. You can do this most efficiently by clicking the **Hide rows** button next to the Copy

button on the **Home** tab of the ribbon. A **Row hiding choices** menu will then tell you how many blank rows it sees and allow you to hide them all at once. You should only need to manually hide rows once, however; thereafter, the setting will be applied to all future snapshots and the rows will automatically be hidden.

The setting directly above this, **Hide newly-empty rows on import**, does something similar. It automatically hides any rows that have become empty because you have unflagged all the tasks that reside in that row. Like the setting below it, “Hide newly-empty rows on import” takes effect on your **next** snapshot, not your current one.

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## 49. Getting Help

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](#) and [video tutorial](#) pages answer your questions.

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## INTELLECTUAL PROPERTY

OnePager products are covered by U.S. Patent Numbers 7,999,810, 8,553,039, 9,251,487, 9,535,893, 10,282,688, 10,380,772, 11,016,651 and other Patents pending before the United States Patent and Trademark Office.

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