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QUICK START GUIDE

NEED HELP? ASK US!

E-Mail Support: 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 Pro V6.1.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.)

(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:

2. Licensing

(1) Double-click the OnePager icon on your desktop (shown above). When the OnePager Pro 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.

(3) You will be taken to our website (the page is [https://www.onepager.com/support/license.php](https://www.onepager.com/support/license.php)). Enter your name, company, e-mail address, and Order Number. For **Product** select **OnePager Pro**. 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 Pro 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. 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 Project file you would like to use to create your project view by hitting the Select… button and browsing for the file.

a. Alternatively, just open the Microsoft Project file you would like to use. Go to the Add-Ins tab and click the OnePager Pro button (see below). Then choose New.

(4) Once a file is selected, type a name for your new project view in the Title of New Project View box.
(5) In the Task selection group, decide whether you want to Select all tasks from your Project file 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 Flag20. (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) Finally, hit Create new project view at the bottom right. OnePager Pro will import your data and display your project view.
4. Editing your Project View

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 > Project-View Properties form:

   ![Project View Properties](image)

   The most powerful editing is under Project View Properties

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 **Project View Properties** instead of making changes by hand:

1. **Speed**: Changing settings through Project View 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 Project View Properties than it is to select tasks one at a time and change fonts individually.
2. **Repeatability**: When you change settings through Project View 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.
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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5. **Exporting your Project View to PowerPoint**

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

(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!
6. Saving and Coming Back to your Project View

To **Save** your project view 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.
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 EDITING YOUR PROJECT VIEW

7. 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!

8. Changing the Date Range

By default, OnePager sets the date range of your project view 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 Project-View Properties button from the Home tab of the ribbon. From the Time Axis tab of Project-View Properties (Calendar sub-tab), simply enter the new desired start/finish date of your project view. Hit OK or Apply to implement your changes.
OnePager® Pro

Users Guide

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OnePager may automatically adjust your date range if the Project 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 Project-View Properties menu, change the Auto-adjust timeline dropdown selection to Always no.

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9. 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 #18 below.)

To change the default formatting for all task bars or milestones, click the Project-View Properties button from the Home tab of the ribbon. To modify task bars, go to the Task Bars tab of Project-View 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.

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(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 Project 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 #22 below.

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

---

10. **Adding Percent Complete, Baseline, and Other Decorations**

Click the **Project-View 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, endpoints, and critical-path segments. 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.

![Gantt Bar/Milestone Symbol Decorations Diagram]

### 11. 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 **Project-View 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.
12. Showing/Hiding/Formatting the Time Cursor

The time cursor is the vertical line on your project view 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.
To change the format of the time cursor, click the **Project-View Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab. Click the **Format borders**... button at the bottom right of the menu. The third tab from the left of this dialog box controls the line color, line width, and line dash style of the time cursor.

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13. **Changing Dimensions of your Project View**

If your OnePager project view 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 project view 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 project view up, down, left, right, or diagonally to resize the project view, just like you would a box or image in PowerPoint.

*Change aspect ratio in Project-View Properties*

First, go to the Home tab and click the **Project-View 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.
14. Modifying the Time Axis Units

To change the units – years, quarters, months, days, etc. – of the time axis, go to Home > Project-View 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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15. Adding/Modifying the Title, Headers, and Footers

You set your **title** when you created the project view, 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 **Project-View Properties** button from the **Home** ribbon and go to the **Headers/Footer** tab. Title font controls are at the top of this menu.
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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16. Changing Background Colors and Striping the Background

Click the **Project-View 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.
POINT AND CLICK FORMATTING

17. Warning About Point and Click Formatting

Whenever possible, we recommend formatting your Gantt chart from the Project-View Properties form. Changes made in Project-View 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 Project-View Properties (because it is not applied globally). Therefore, if you ever decide to make a template from your project view (see #39 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 project view. By contrast, any changes you make through Project-View 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 Project-View Properties and set a conditional formatting rule (see #22 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 Project-View 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 Project-View Properties form. Rest assured that all point-and-click changes are saved with your Project View, even though they are not saved to the global Project-View Properties.

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18. Modifying the Appearance of an Individual Task Bar/Milestone

Please first read the Warning in #17 above. If you are sure you want to reformat a task bar/milestone outside of Project-View 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 Position buttons on the right-hand side of the Home tab of the ribbon. Each of these 9 buttons shows where the label will display relative to the task bar/milestone.
To reformat multiple task bars/milestones at once (but not all task bars/milestones – see #9 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.

19. 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 project view to the data in Microsoft Project. 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.
20. Displaying Task Bars as Milestones

If you want to display all task bars as milestone symbols, click the Project-View 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 #17 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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21. Stretching or Hiding Time Axis Cells

Starting in version 6.1, 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 2018, 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**

<table>
<thead>
<tr>
<th>Q3</th>
<th>Q4</th>
<th>Q1</th>
<th>Q2</th>
<th>Q3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sep</td>
<td>Oct</td>
<td>Nov</td>
<td>Dec</td>
<td>Jan</td>
</tr>
<tr>
<td>Assemble Resources</td>
<td>Create Working Plans</td>
<td>MERLIN Subcontractor Selection</td>
<td>ADONIS Subcontractor Selection</td>
<td>Engineering Team 1 Development</td>
</tr>
</tbody>
</table>

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 project view.
### Bluegrass Project

<table>
<thead>
<tr>
<th>2017</th>
<th>2018</th>
</tr>
</thead>
<tbody>
<tr>
<td>Q3</td>
<td>Q4</td>
</tr>
<tr>
<td>Sep</td>
<td>Oct</td>
</tr>
<tr>
<td><img src="image" alt="Assemble Resources" /></td>
<td><img src="image" alt="Create Working Plans" /></td>
</tr>
<tr>
<td><img src="image" alt="Engineering Team 1 Development" /></td>
<td><img src="image" alt="Engineering Team 2 Development" /></td>
</tr>
</tbody>
</table>
CONDITIONAL FORMATTING

22. 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 summary tasks are larger than detail 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 Project-View 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 Project-View Properties form.

The conditional formatting rule we’ve set will now be applied to our project view, and will be reevaluated every time we update the project view 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

23. Collecting Task Bars/Milestones into Rows

By default, OnePager puts each task bar or milestone into its own horizontal row. If you want to collect multiple task bars/milestones into the same row, click the [Project-View Properties] button on the [Home] ribbon and go to the [Rows/Swimlanes] tab.

You have two other options:

(a) **Collect tasks into rows by**... will collect all the tasks and milestones which have the same value in a Microsoft Project field of your choosing into the same row. For example, if you want a left-to-right lineup of all the tasks assigned to Team A in the same row, you would select [Resource Names] from the dropdown menu. The **Collect tasks automatically** option will place as many tasks as it can into a single row, but will automatically bump shapes into a new row if your tasks and milestones start overlapping. If you prefer not to stagger your layout when things overlap, choose the **Collect up to ____ tasks per row** option instead, and choose a big number.

(b) **Make ____ rows** will hard-wire a set number of rows, and figure out how to fit your tasks and milestones inside that set number of rows. This option is used rarely.
24. Grouping Rows into Swimlanes

A swimlane is a collection of rows. In the example screenshot below, tasks are grouped into swimlanes by Level 1 Summary Name, and rows are labelled by Status. Most users set swimlanes in their reports to Phase, Subproject, Department, Resource Names, or other easily identifiable groupings.

To group your tasks into swimlanes, click the Project-View Properties button from the Home tab of the ribbon and go to the Rows/Swimlanes tab (see screenshot in #23 above). Turn on the checkbox for Group rows into swimlanes by… and select a Microsoft Project field from the dropdown list. Hit OK or Apply to implement your changes.

25. Adding Multiple Text Columns to Label Rows

OnePager allows you to display up to six columns of text to the left of your Gantt chart: one swimlane label, and up to five Text Columns meant to correspond to the row. In the example
chart below, all six columns have been turned on, with the swimlane label on the far left. This maximizes your ability to display helpful text information alongside your graphics.

Bluegrass Project

To enable Text Columns, click the **Project-View Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in #23 above). Ensure the **Show text columns** checkbox is checked on, and then check **Text Column Properties…** to bring up the **Custom Text Columns** dialog box. From here, you can turn on 1, 2, 3, 4, or 5 columns of text, indicate which field from your source file(s) will populate the labels, and format the labels (font, date format, decimal places, currency or percent symbols, etc.).
26. Changing Swimlane Labels or Text Columns

Double-click on any text column or swimlane label (i.e. “Level 1 summary name”) to change it, then hit OK to implement your changes. Changes to these labels will not impact your underlying Microsoft Project data, but we will save them in the project view so your labels stay intact for future updates. Because these changes are made outside of Project-View Properties, they will not be saved to any templates you create from this project view (see #17 above for more detail).

If you want to completely show/hide row 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 #23 above).

27. Changing Row/Swimlane Borders

Click the Project-View Properties button from the Home tab of the ribbon and go to the Rows/Swimlanes tab (see screenshot in #23 above). The Borders group allows you to either completely hide row/swimlane borders (by unchecking the boxes), or change their color, weight, and dash type (by clicking Format borders…). Hit OK or Apply to implement your changes.
28. 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 **#25** above on how to show text columns.

**Warning:** Because row/swimlane movements of this kind are made outside of Project-View Properties, they will not be saved to any templates you create from this project view (see **#17** above). You may want to apply a global ordering rule to your rows/swimlanes instead. To do this, click the **Project-View Properties** button from the **Home** tab of the ribbon and go to the **Rows/Swimlanes** tab (see screenshot in **#23**). From the **Ordering** group, you can either order rows/swimlanes as they are ordered in Microsoft Project, or you can order them according to the Microsoft Project field of your choosing. Hit **OK** or **Apply** to implement your changes, which **will** be applied to any templates you make from this project view in the future.

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29. 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 **#25** 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 **Project-View 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.
30. Adding Blank Rows/Swimlanes

To add a blank row or swimlane to your project view, right-click on empty space in your Gantt chart and choose Add row or Add swimlane (for screenshot, see #23 above). You will be asked whether to add the new row/swimlane Above or Below the current one.
31. Adding/Removing Automatic Page Breaks

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

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

If your project view is too long to fit on a single page without looking like this, the best solution is to allow the project view to print on multiple pages. OnePager has a setting that automatically inserts page breaks and does a “best fit” across multiple pages for longer project views. 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 project view 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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32. Adding/Removing Manual Page Breaks

OnePager also allows you to add manual page breaks to a project view. 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 project view vertically – or Insert horizontal page break, to insert a vertical line that divides the project view 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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33. Freezing Panes

Just like in Microsoft Excel, OnePager allows you to freeze either the top, bottom, or left side of your project view, 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!
SHARING

34. Copying your Project View 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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35. Printing your Project View

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 **Project-View Properties** menu. If your project view 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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36. Exporting your Project View 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 project view 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)** – shown 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 project view, simply click **Send to PDF**, again specifying the page or pages you wish to export.
Exporting Your Project View

Send to PowerPoint
Put your project view into a new PowerPoint presentation

Send to PDF
Put your project view into a new PDF file

Send to Microsoft Outlook
Put your project view into a new Outlook e-mail message

Send to Image File(s) of Type:
PNG

Page Range
- Entire Document
- All Pages
- Current Page
- Pages: [ ]
UPDATING

37. 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 project view reflecting those updates. Each snapshot is associated with a date, so an individual project view might have one snapshot for October 1, 2018; another snapshot for November 1, 2018; and so forth. Over time, one project view 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 Project file.
(b) Open your OnePager project view, 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 project view will display 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.

38. 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 Project file or to flag an important task for inclusion. To replace a snapshot:

(a) Make the necessary changes in your Microsoft Project file.
(b) Open your OnePager project view, 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 Project 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 Project and fetch updated start/finish dates, baseline start/finish dates, percent complete/critical path values, and refresh any conditional formatting in your project view (e.g., rules set in Project-View 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 Project file, to undo manual name changes made in OnePager, or when they have made significant changes to the work breakdown structure (WBS) in Microsoft Project.
   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.
Finally, click the button labeled **Replace dates** or **Replace all properties** (depending on which mode you selected) to generate your revised snapshot.
39. Creating a Standard Template to Share with your Team

If your team finds itself creating project views 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 project view. Once your project view’s formatting is just the way you want it, click the Copy to Template button to the right of the Project-View 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 Project-View Properties settings, but will not capture any manual point-and-click changes that you made by hand; see #17 above for more on this topic.

40. Editing and Using Templates

To edit a template, open Microsoft Project, click Add-Ins on the ribbon, and click the Templates… button next to the OnePager Pro button.
The tabs on the template menu – shown below – are identical to the tabs in the Project-View Properties form inside OnePager. This is because when you hit the Copy to Template button earlier, you basically copied the Project-View Properties settings from that project view into the menu you see now.

From this Templates menu, you can change the properties of future project views that you create from this template. For example, if you want tasks to always be initially grouped into swimlanes 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 project view. Unless you specify otherwise, OnePager will make this new project view using the template you last created or edited. That means all the project-view properties you copied into your template will be applied to this brand-new project view.

You can change which template new project views 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 project views. Once a project view has been created from its “parent” template, it is completely independent of all templates.
INSERTING ADDITIONAL VISUAL ELEMENTS

41. 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.
42. 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 project view.
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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### 43. Adding Data-Driven Task Links

Starting in version 6.1, OnePager also allows you to add task links based on the Predecessor data you have in Microsoft Project. These **data-driven** task links will not only draw automatically, but they will also be updated as you modify predecessor data in your Project file (and then update your OnePager project view).

To enable data-driven task links, go to **Home > Project-View Properties > Task Links** and turn on the **Import and show links** checkbox, near the bottom. At this point you have two choices: (a) show all data-driven task links, or (b) use filtering rules to determine which task links to show. We recommend you start with option (a), but consider using option (b) if there are too many task links on the screen. Then hit **OK** or **Apply** to commit your changes.
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.
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 manual 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 > Project-View Properties > Time Axis > Format and change the Curtain Colors dropdown for the weekdays desired. Here we have Saturday and Sunday colored:

![Curtain Colors dropdown](image)

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 #41) 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.

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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VIEWS OF MULTIPLE PROJECTS

47. Making a Project View Showing Multiple Projects

If you are managing multiple Microsoft Project files and want to display task data from all of them in a single OnePager project view, this can be accomplished in four simple steps.

(a) Launch OnePager. From the Start screen, choose **New**.
(b) Select one of your .mpp files as the first Microsoft Project source file. Then, click the **Change...** button to launch the **Data source selection** dialog box, from which you can add the other files (as many as you like). Hit **OK**.

(c) To select which individual tasks and milestones you want to import, insert *the same Flag* column into each of your Microsoft Project files (to insert a Flag column simply **right-click** on any column heading and then select **Insert Column**). Place a **Yes** in the flag column you chose to indicate which tasks you want to pull in to your OnePager document.

   a. Alternatively, you can set a **custom filter** rule, i.e. import all tasks that have a % Complete value less than 100. This rule will be applied to all source files.
(d) Create a new project view as normal (see #3 above). OnePager will create a multi-project Gantt chart, pulling in task data from each individual Project file automatically.

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TROUBLESHOOTING

48. 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 project view 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 project view 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 project view, and then click **Fix Selected**. The task will automatically return to the project view – *unless the task was not flagged for 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 Project to begin with. To change that, simply go to Project and change the flag value of the task you want to be visible to “Yes.” 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 project view, or replace your current snapshot (see #37 and #38 above), and your task will appear.

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### 49. 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 Flag value on one of those tasks gets changed (in Microsoft Project) 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 **Project-View 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 project view, 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.

50. Getting Help

We are eager to help you use OnePager Pro to its full potential. Please e-mail us with any questions at 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.