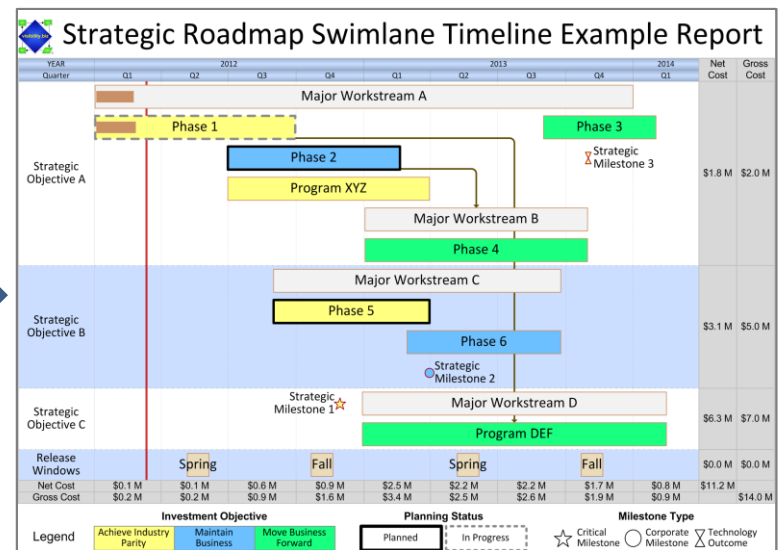
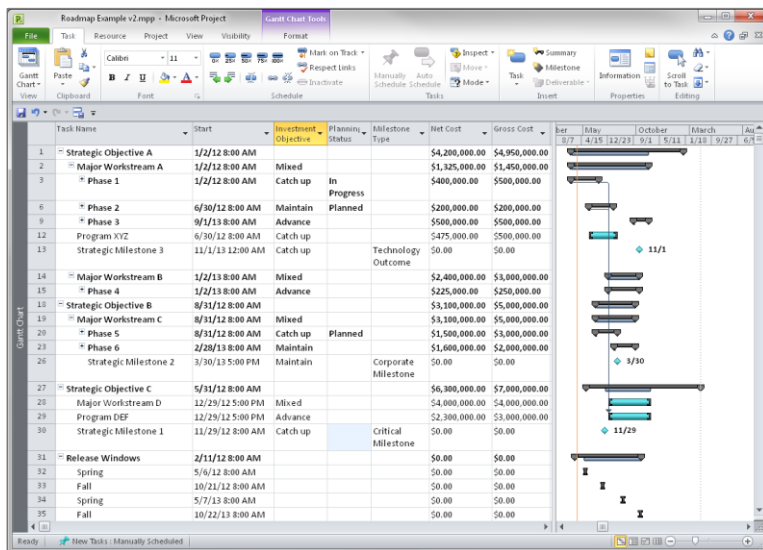


Swimlane Timeline™

Conditional Format Views & Legends with the Swimlane Timeline v8.1

Go from this...

To this...in seconds!



Create-Change-Share Custom Conditional Format Views & Legends with Swimlane Timeline v8.1

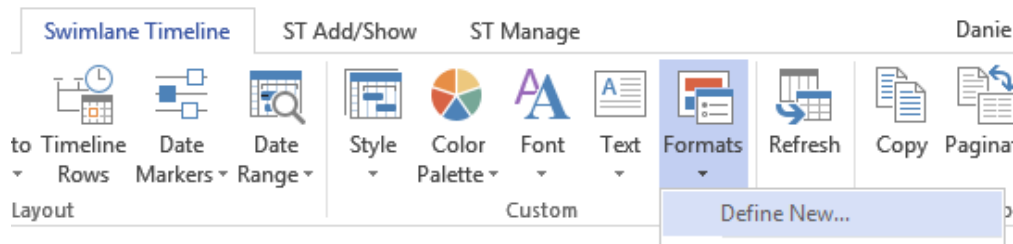
- **Custom User vs Custom Shared Settings**
- Define a new custom conditional format view
- Changing custom format view settings
- Creating an associated custom view legend
- Editing a custom format legend
- Sharing a conditional format view & legend

Custom User vs Custom Shared Settings

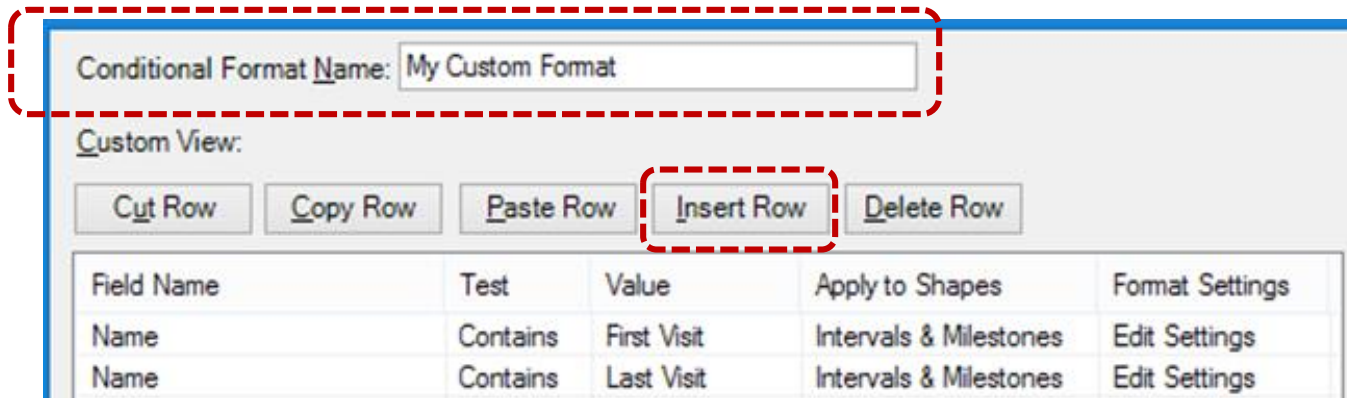
- All custom Swimlane Timeline settings that you create are automatically saved to your local PC **Custom User** folder.
- The **ST Manage/Shared Folder** option allows you to access additional custom settings that are shared by others and reside in the **Custom Shared** folder.
- You can only “Change” custom settings that are located in your local PC **Custom User** folder.
- If you would like to “Change” a custom setting that resides in the **Custom Shared** folder, then you will first need to use the **Copy Selected to User** option to get a copy into your local PC **Custom User** folder.
- If you would like to “Share” a **Custom User** setting with others then use the **Copy Selected to a Folder** option to place a copy in the **Custom Shared** folder (default location is the Shared Folder; if specified).

Define a New Custom Conditional Format View

- Use the “Swimlane Timeline/Formats/Define New...” option



- Specify a Conditional Format Name & then Insert Rows



Define a New Custom Format View Cont...

- For each inserted row, double-click on **Field Name**, **Test**, **Value**, **Apply to Shapes**, and **Format Settings** to select from pick lists

Visibility.Biz Swimlane Timeline

Conditional Format Name:

Custom View:

Field Name	Test	Value	Apply to Shapes	Format Settings	Edit Settings
Project Status	=	Late	Intervals & Milestone		
Act Execute	=		Intervals & Milestones		
Act Plan	<>	<Enter value>	Intervals		
Actual	>	Complete	Milestones		
Baseline_Finish	>=	Late	Percent Complete Bar		
Baseline_Start	<	Late Due to Predecessor			
Budget	<=	On Track			
Discretion Level	Contains				
Duration					
Execute					
Finish					
ID					
Milestone					
Milestone Percent					
Milestone Type					
Name					
Outline_Number					
Owner					
Percent_Complete					
Plan					
Project Status					

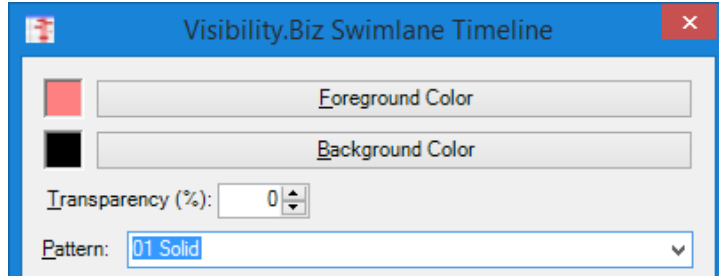
Visibility.Biz Swimlane Timeline

See Next Slide for Edit Settings Details

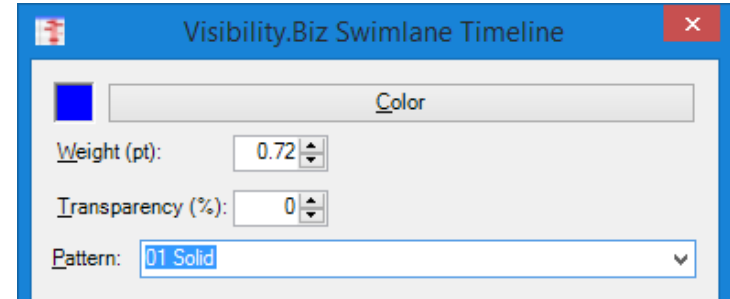
Define a New Custom Format View Cont...

“Edit Settings” Available for Conditional Formatting

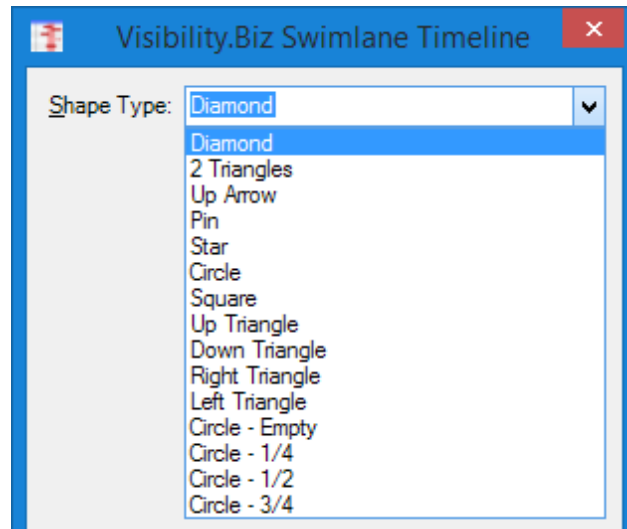
- Fill Format



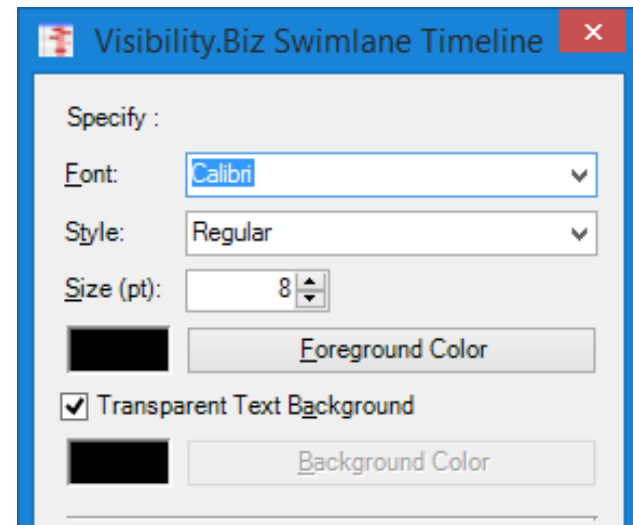
- Line Format



- Milestone Format



- Text Format

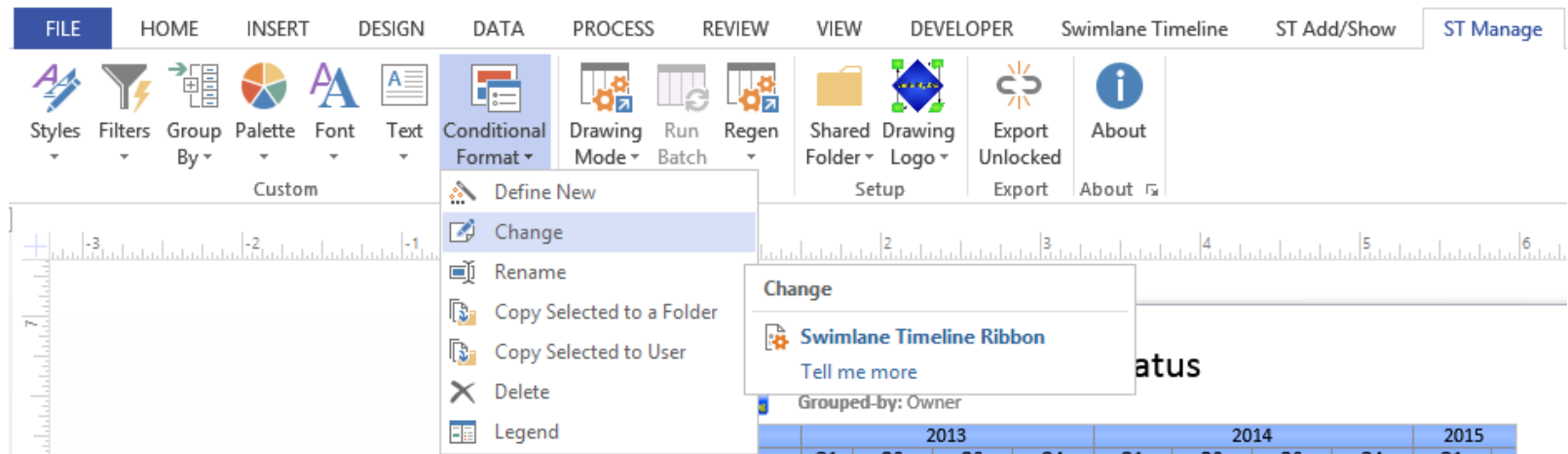


Define a New Custom Format View Cont...

- If multiple conditional tests are evaluated to be true for a task (for example, one sets fill color yellow, and the other sets fill color blue), the first true conditional formatting statement encountered is applied.
- The stacking order for conditional statements can be modified using the Row “Move Up” and “Move Down” options.
- Newly created named Conditional Formats are automatically saved to the local PC **Custom User** folder, and are immediately available to you from the **Swimlane Timeline/Formats** option.
- If your format view colors aren’t being applied, then first apply **Swimlane Timeline/Formats/None**, and then retry your format view.

Changing Custom Format View Settings

- Use the **ST Manage/Conditional Format/Change** option to modify an existing named conditional format view that resides in your local PC **Custom User** folder.



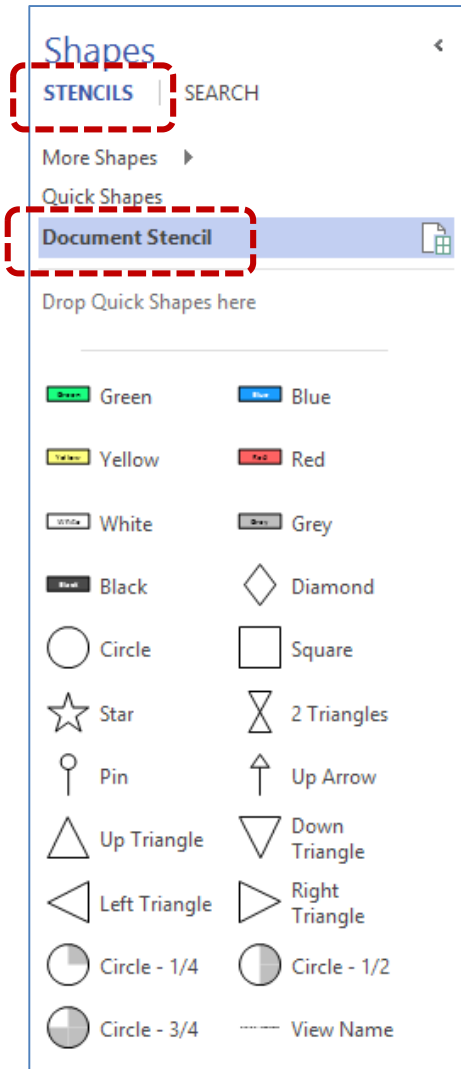
- If you would like to “Change” a custom setting that resides in the **Custom Shared** folder, then you will first need to use the **Copy Selected to User** option to get a copy into your local PC **Custom User** folder.

Creating an associated custom view legend

- The conditional format view legend is a Visio master shape that you create and name. When a conditional format view with the same name is applied, the legend master shape is automatically placed at the bottom of the Swimlane Timeline report.
- You can place any Visio shapes into the legend drawing, but you will find Swimlane Timeline specific shapes in the legend **Document Stencil** to make it easier to build your legends.
- After you have created the conditional format view, you can then select the **ST Manage/Conditional Format/Legend** option to create a new associated legend drawing for editing.

Creating an associated custom view legend Cont...

- When the legend default drawing page appears, make sure “STENCILS” is selected under “Shapes”, and the **Document Stencil** is visible.
- If you don't see the Shapes task pane, then use the **Visio/View/Task Panes/Shapes** option to show it.
- If the **Document Stencil** is not visible, then use the “More Shapes” arrow to select “Show Document Stencil”.

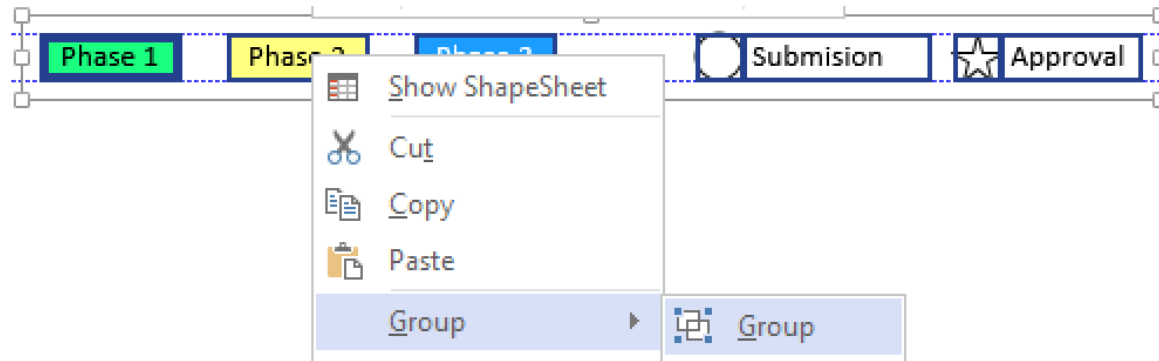


Creating an associated custom view legend Cont...

- Drag and drop the desired Swimlane Timeline shapes from the legend **Document Stencil** onto the drawing page. Use the visible guidelines to vertically align shapes.
- Click on shapes to edit text, and use the **Visio/Insert/Text Box** option to add your own text.

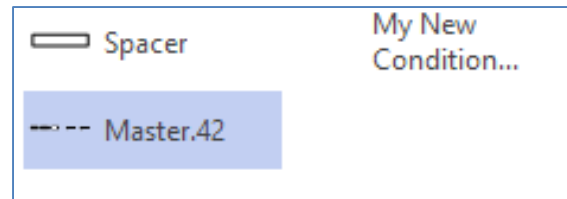


- Select all shapes with a click and drag rubber-band box around them all, and then right-click on any shape and select “Group”.



Creating an associated custom view legend Cont...

- Drag the grouped shape into the legend **Document Stencil** to create a new master shape.
 - In this example, Master.42
- Delete any pre-existing master shape in the **Document Stencil** with the exact same name as the name of your conditional format view.
 - In this case, I will right-click and delete the master shape named “My New Conditional Format”
- Rename the new master shape to match the name of the format view
 - In this case, I will right-click and rename “Master.42” to be “My New Conditional Format”
- Close the legend drawing, and the legend will be saved in the **Custom User** folder. The next time you apply the conditional format view the associated legend will also be displayed at the bottom of the report.



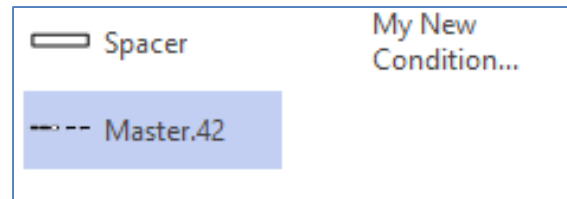
Editing a Custom Format Legend

- To edit an existing legend, select the **ST Manage/Conditional Format/Legend** option to open a legend drawing for editing.
- Drag the legend master shape from the **Document Stencil** onto the drawing page. Right-click, select Group, and then Ungroup.
- Make the desired changes to the legend.
- Regroup all shapes with a click and drag rubber-band box around them all to select, and then right-click on any selected shape to “Group” them.

Editing a Custom Format Legend Cont...

- Drag the grouped shape into the legend **Document Stencil** to create a new master shape.

- In this example, Master.42



- Delete any existing master shape in the **Document Stencil** with the exact same name as the name of your conditional format view.
 - In this case, I will right-click and delete the master shape named “My New Conditional Format”
- Rename the new master shape to match the name of the format view
 - In this case, I will right-click and rename “Master.42” to be “My New Conditional Format”
- Close the legend drawing, and the legend will be saved in the **Custom User** folder. The next time you apply the conditional format view the associated legend will also be displayed at the bottom of the report.

Sharing a conditional format view & legend

- If you would like to “Share” a **Custom User** setting with others then use the Swimlane Timeline v8.1 **Copy Selected to a Folder** option to place a copy in some shared folder location (default destination is the currently selected Shared Folder; if specified).
 - Other users will be able to access your shared custom settings after they use the **ST Manage/Shared Folder** option to point to that location.
- The **ST Manage/Shared Folder** option allows Swimlane Timeline users to access additional custom settings that reside in some corporate shared folder location (internal network or cloud folder that is a “Mapped Network Drive” to a windows drive letter, for example drive “Z:”)