Swiftlight – Tips from the Experts

This short document provides answers to some of the questions commonly raised by our users. We hope you will find it helpful! If, however, you have a question which is not dealt with here, please look at the support section of our website and / or just contact us at support@torridonsolutions.com. We are happy to help!

How should I best use Swiftlight?

Rather than there being "one good way" to use Swiftlight, there are lots of good ways. The approach that is best for you will depend on your project and on your working style, but to give you some guidance we've outlined below three of the most common ways to use Swiftlight below:

Approach	Views Used[1]	When to use this approach
Timeline creation and management	• Timeline only	Whenever you need a timeline or a high level view of your project
High level project planning and tracking	• Timeline + Activity Group Summary + Objectives and Scope (sometimes)	When you need a bit more detail than a timeline: • For thinking through the specifics of objectives, deliverables etc at both the project and / or activity level • For project proposals / project charters • For communicating project progress
In-depth project management	• Timeline + Activity Group Summary + Objectives and Scope Plus: • Activity Group Detail • Action List over Time / Action List • Contact List - to list the people involved	In addition to the above… • For adding detail to the plan and listing the specifics of "who has to do what by when" • When you want to review or update the plan and / or to track progress: o So you can see what needs to get done o When working with the team o When reporting to management

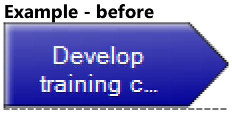
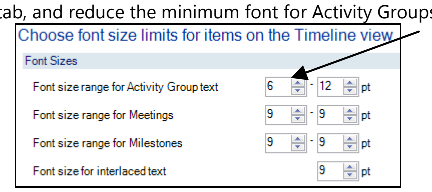
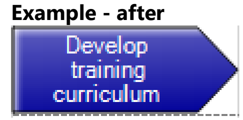
Note: [1] While you will likely always start with a timeline, you can use some, all or none of the other views, as best fits your needs.

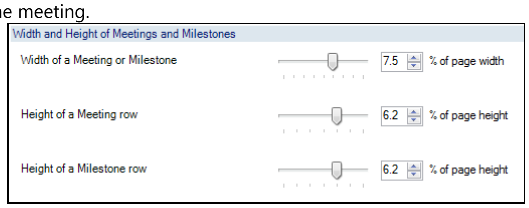
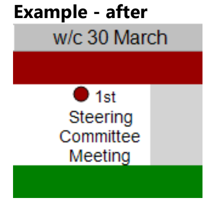
Where should I get started?

99 times out of 100, it makes sense to start at the Timeline View. To get a good a sense of how to get started, look at the Overview Video on our website.

Formatting the Timeline

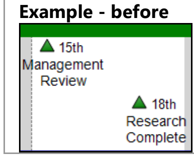
The timeline is often the centerpiece of a project plan, and it's one that most people want to get looking "just right". While Swiftlight does a lot of formatting for you and the graphics are designed to generally look great, you will still need to learn how to fine-tune the formats in order to get best use of the display and keep that timeline looking the way you want. Don't worry though – it's very simple. Find below a list of the most common formatting questions and their solutions:

Question	Solution
The text in Activity Group is getting truncated – is there a way to see all of the text? **Example - before** 	You can fix this by reducing the minimum font for Activity Group text: • Open the formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the timeline. • Select the "Font" tab, and reduce the minimum font for Activity Groups.  **Example - after**  Alternatively you can either reduce the visible date range of your timeline – which will increase the width of all of your Activity Group arrows, giving more space for your text; or you can reduce the number of rows on your page – which will give the Activity Groups greater height to accommodate your text

Question	Solution
I can't see all the text in one of my key meetings (or milestones)? **Example - before** 	You can fix this by changing either the width or height of the meeting and its text box, or by reducing the font size for the text. • Open the formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the timeline • Select the "Meeting and Milestone Format" tab and either increase the width or the height of the meeting.  **Example - after**  • And / or select the fonts dialogue and reduce the minimum font for meetings (or milestones) as needed. (see problem 1 above)

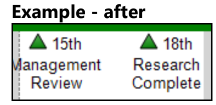
Question	Solution
I have milestones on two different rows, and I'd like to get them on the same row:	The milestones are on different rows because they are too close together given the width specified for them in the format dialogues. You can fix this by:

Example - before



- Opening the formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the timeline
- Selecting the "Meeting and Milestone Format" tab and decreasing increasing the width of meetings and milestones (see graphic above)

Example - after



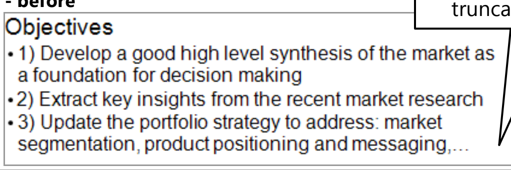
Question	Solution
I don't want the section at the top with objectives, nor do I want the Key Meetings and Key Milestones sections on my timeline. Can I remove them?	Yes you can remove both the top "header section" and the key meeting and milestone sections as follows:

- To remove the objectives and other categories of information in the page header section, open the Page Header formatting dialogue from the menus (PageLayout>PageHeader) or by using the upper arrow button to the left of the timeline, and then de-select all the categories using the check boxes
- To remove the Key Meetings and Milestones section, open the PageBody dialogue, select the Display of Key Meetings and Milestones tab and de-select "Show Key Meetings" and "Show Key Milestones"

Question	Solution
The bullet points in the objectives category in the page header are not all being displayed	You can generally fix this by reducing the font size of the bullets:

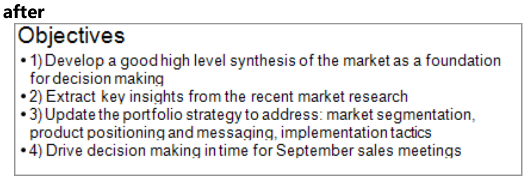
Text is getting truncated

Example - before



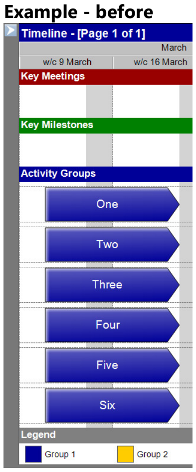
- Either: a) right click, when in a bullet, and select "Format Bullet Text", or b) use the menus: PageLayout>FormatText
- Reduce the font size and click the "Apply to All" button to reduce the font of all the bullets.

Example - after



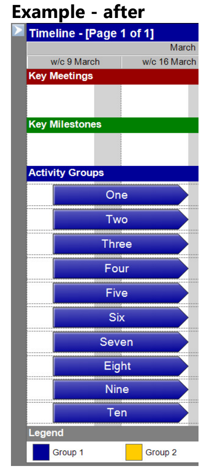
Question	Solution
There are only 6 rows for Activities Groups on the timeline. How do I add more rows?	There are two main ways to add more rows:

Example - before



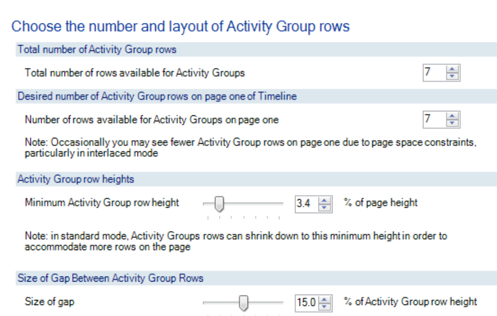
1. Open the right click menu (when the cursor is over the lower (Activity Group) section of the timeline, and select the option to "Add Timeline Row". This adds 1 row at a time.
2. Open the formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the timeline; select the "Activity Group Rows" tab and increase the number of rows using the controls, as shown below:

Example - after



Question	Solution
My timeline has gone onto two pages, how do I get it back on one page?	There are a number of things you can do format the timeline and try to get all of your plan on one page:

- Open the Page Body formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the timeline
- Select the "Activity Group Rows" tab and use the controls to:
  - Increase the desired number of Activity Group rows on page one
  - Reduce the minimum height for Activity Groups
  - If you are not using them, you could also close up the page header and / or remove the section with Key Meetings and Milestones. This will create significantly more space for Activity Group Rows

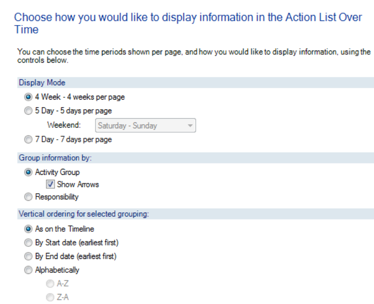


Other Tips

Question	Solution
How can I share the project plan with the team?	There are at least three ways to share the project plan: 1. You can export key outputs (e.g. the Timeline) into PowerPoint or PDF and share those documents with the team; 2. If the other team members also have Swiftlight, then you can share and collaborate on a plan in exactly the same way that you can share and collaborate on a Word, Excel or PowerPoint file; 3. You can export the lists/tables in Swiftlight (e.g. Activity Group Detail, Action List, Activity Group Detail) to Excel in CSV form, or copy and paste list items from Swiftlight to Word, Outlook or other common Office applications.

Question	Solution

I have got a team working on the project. How do I set up a plan to work with them?	We realize that every team and project is different, and we are not too prescriptive on this. However, our view is that the most important thing to do to have a good up-to-date high level plan that can keep everyone aligned around the key milestones and deliverables. Our recommendation is as follows:
	• Build and maintain a relatively simple high level plan (in general terms, this plan should be the one that you use to keep the project on track and for upward management) including the following important elements:
	  o Key activities (Activity Group arrows on the timeline);
	  o Key meetings and milestones; and
	  o High level objectives and deliverables
	• Make sure that each team member that holds responsibility for a particular Activity Group has a copy of the master plan and keeps the Activity Group for which they are responsible up-to-date.
	• Keep the master plan up-to-date manually or by using copy and paste to get the appropriate Activity Groups from each of your team members' Swiftlight files into the master plan file (and deleting the old version of the Activity Group).

Question	Solution
How do I get a view on my team's workload?	Although Swiftlight does not have the highly complex workload balancing functionality sometimes found in other project management software, you can get a view of workload in two ways: 1) By listing man day estimates by task in the "budget" column in the Action List (or Activity Group Detail) and then exporting this data to Excel for manipulation; 2) At the overview level, by using the Action List Over Time view: • Go to the Action List Over Time view (Ctrl + 6) to see what is happening (Milestones, Meeting and Actions) by week; • Open the Page Body formatting dialogue from the menus (PageLayout>PageBody) or by using the lower arrow button to the left of the main part of the page; • In the "Group Information By" section, click on Responsibility to be able to see the tasks sorted by team member. 

Short-Cuts

View Specific Shortcuts		
Timeline	Ctrl + R =	Timeline Review Mode (on / off)
Action List / Activity Group Detail / Action List Over Time	Ctrl + Enter =	Marks an item as "Completed" and crosses it out
Action List Over Time	Ctrl + Left arrow =	Move one page to the left
	Ctrl + Right arrow =	Move one page to the right
	Page Up =	Move one page up
	Page Down =	Move one page down

General Shortcuts	
Ctrl + B =	Bold
Ctrl + C =	Copy
Ctrl + D =	Delete
Ctrl + F =	Find
Ctrl + H =	Replace
Ctrl + I =	Italics
Ctrl + M =	Open Page Body Dialogue
Ctrl + N =	New File
Ctrl + O =	Open File
Ctrl + P =	Print
Ctrl + Q =	Exit
Ctrl + S =	Save File
Ctrl + T =	Open Format Text Dialogue
Ctrl + U =	Underline
Ctrl + V =	Paste
Ctrl + X =	Cut
Ctrl + Y =	Re-do
Ctrl + Z =	Undo
Dialogues	
Esc =	Cancel

Navigation Shortcuts	
Ctrl + 1 =	Go to Objectives & Scope View
Ctrl + 2 =	Go to Timeline View (in Standard Mode)
Ctrl + 3 =	Go to Activity Group Summary
Ctrl + 4 =	Go to Activity Group Detail
Ctrl + 5 =	Go to Action List
Ctrl + 6 =	Go to Action List over Time
Ctrl + 7 =	Go to Contacts List
Ctrl + 8 =	Go to Issues Log
Moving / Ordering Lists and Tables	
Ctrl + J =	Move Up
Ctrl + Shift + J =	Move to Top
Ctrl + K =	Move Down
Ctrl + Shift + K =	Move to Bottom
Tables, Lists, Bullets	
Tab =	Move to next cell
Shift + Tab =	Move to previous cell
Enter =	Hard return (new bullet or commit data)
Shift + Enter =	Soft return (new line in same bullet)
Ctrl + Right arrow =	Indent bullet text
Ctrl + Left arrow =	Outdent bullet text