



Swiftlight®

Project Management and Communication Software

"See the way ahead"

Getting Started Guide

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1) The User Interface

Swiftlight's User Interface is similar in many ways to the standard Microsoft Office products, with a clearly defined working area or "page", data entry by click and type or drag and drop, menus and toolbars at the top etc. After a brief orientation to it, most people find the interface very intuitive and easy to learn – and we hope that's the case for you too.

When you first open Swiftlight and create a new project, it opens at the Timeline view of which an example, with a little data added, is shown below. The numbered points highlight some key aspects of the interface:

Guided Tour of the Screen - Timeline example

1 Content is laid out on pages (against a grey background)

2 Page Body: the lower section of the page

3 Page Header: the top section of the page

4 Menus and toolbars

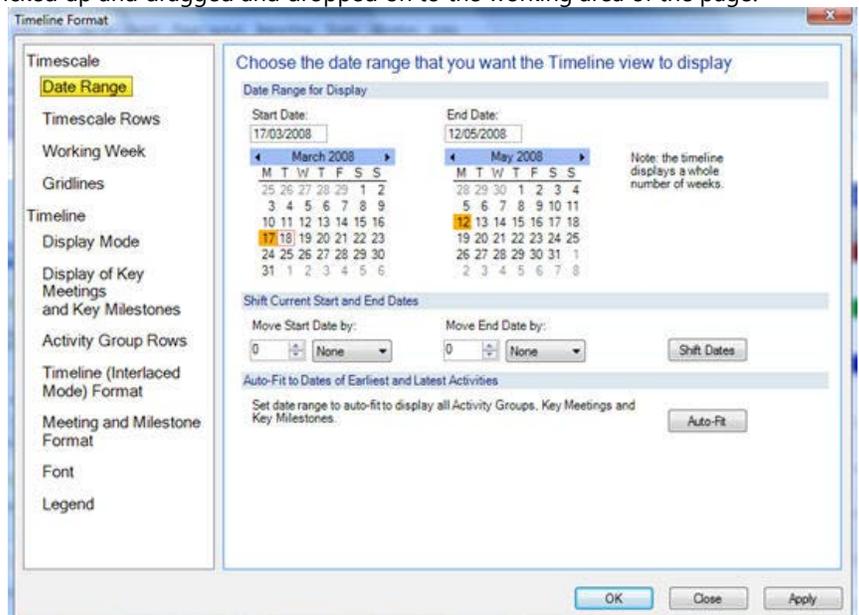
5 Toolbox – drag and drop objects from here to the page

6 Click these buttons to open dialogues which let you format the Page Header or the Page Body

7 Views: click on icons to move to a different view

8 Activity Groups – double-click to get to Activity Group Detail view and see more detail

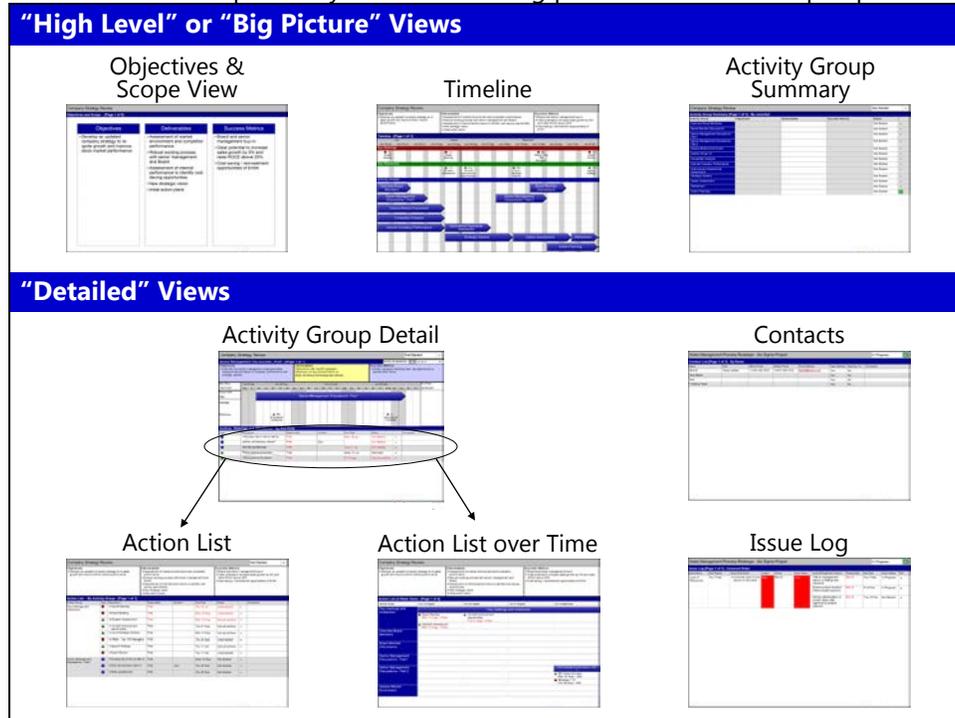
1. A key design principle behind the user interface is "what you see is what you get" (WYSIWYG). The main working area of the screen looks like a page on a grey background, and this page is what you will get when you print, or when you export a view to PowerPoint® or PDF. (The mental model is more like Microsoft PowerPoint® than Microsoft Excel®). Note that if there is more than one page in a view you can scroll or page down to see the other page(s).
2. The "Page Body" is the lower section of the page, in this case containing the timeline dates, key meetings, key milestones and activity groups.
3. The "Page Header" is the top section of the page, containing the project title, and in this case bullet boxes for objectives, deliverables and success metrics.
4. At the top of the screen are standard menu functions and toolbar shortcuts for formatting and switching between views.
5. The tool box contains objects which can be picked up and dragged and dropped on to the working area of the page.
6. Clicking on the small grey buttons with white arrows opens up formatting dialogues which allow you to format the page header and the page body. The example on the right shows one of the formatting dialogues for the Timeline view.
7. Clicking on the view icons allows you to move to one of the other views.
8. In general, double clicking on something in any view will show you more detail (if it is available). In this timeline example, double clicking on one of the Activity Group arrows takes you to the Activity Group Detail for that particular activity.



2) Key Features

Swiftlight's Views

Swiftlight has 8 different "Views" which provide you with both "big picture" and detailed perspectives on your project.



A short description of each view and when to consider using them is shown below:

View	Description	When to Use it
Objectives and Scope	<ul style="list-style-type: none"> A series of pages for displaying information about the project's scope. Some or all of the following categories of information can be used: objectives; key questions, deliverables; success metrics; budget; what's in / out of scope and finally a page for general comments. 	These views provide good "high level" perspectives on the project <ul style="list-style-type: none"> When defining or updating a high level plan
Timeline	<ul style="list-style-type: none"> An intuitive and highly configurable view that provides a "big picture" view of the plan in a one page wide timeline. There are two main modes of display: "Standard" and the "Interlaced" mode which displays more detailed information about the main Activity Groups 	<ul style="list-style-type: none"> For project scope / charter documents or project proposals , or in meetings to review project scope or progress For communication of scope or progress
Activity Group Summary	<ul style="list-style-type: none"> A summary table of information about the Activity Groups. Some or all of the following categories of information can be used: objectives; key questions; deliverables; success metrics; budget; comments; responsibility; status (e.g. Not Started, In Progress, Complete) ; percentage complete; performance (Traffic light); activity start date; activity end date. 	
Activity Group Detail	<ul style="list-style-type: none"> Provides detail on what is happening, or needs to happen, within a particular Activity Group. <ul style="list-style-type: none"> The objectives, issues, deliverables, success metrics, budget, comments, percentage complete; status, performance (traffic light) The "to do list" for the activity, Meetings, Milestones and Actions, responsibilities due dates, status, performance et al. 	<ul style="list-style-type: none"> When adding detail to a plan When working with the team to get going on an individual activity; When reviewing progress and updating the plan
Action List	<ul style="list-style-type: none"> The "to do list" for the whole project, with all the Meetings, Milestones and Actions, responsibilities, due dates etc across all of the Activity Groups. 	<ul style="list-style-type: none"> For simple projects, this can be a good view for creating the detail in the plan or viewing and updating tasks etc
Action List over Time	<ul style="list-style-type: none"> A time based view of Activity Groups and their Meetings, Milestones and Actions either by week (4 weeks to a page), or by day (5 or 7 days per page). It is a great view for creating, reviewing and updating "what needs to get done in the next week or few weeks", or for reviewing what should have happened, as it gives you a perspective across all the Activity Groups. 	<ul style="list-style-type: none"> For looking at what needs to get done in the next 1-4 weeks – either by Activity Group or by person For updating what needs to get done For working with the team on the above
Contacts	<ul style="list-style-type: none"> Displays contact information for people or groups/entities involved in the project. (Contacts can be assigned responsibility for Activity Groups and individual Meetings, Milestones and Actions), 	<ul style="list-style-type: none"> At the start of the project so that responsibilities can be assigned For sharing with the team/others
Issue Log	<ul style="list-style-type: none"> A place for tracking, managing and reporting on issues that may arise on your project. It allows you to describe the issue, its potential impact and the actions you plan to take to deal with them. 	<ul style="list-style-type: none"> During project implementation to help you and others keep track of and resolve issues that may affect project success.

Adding/Editing Data in Each View

Data entry is highly intuitive:

- Either click and type (for example in the page header, or in areas of text), or drag and drop objects from the toolbox onto the page (right click and add also works).
- To edit items either click on the text, or select the object and move it, or use the right click or main menus.
- Double clicking on items will show more detail on that item, if it is available.
- Editing something in one view of the application automatically updates it everywhere else (e.g. if you change the name of a milestone in the timeline, it automatically updates itself in the Action List, Activity Group Detail, and Action List over Time).

Formatting

As you add or edit data on each view, a Dynamic Formatting Algorithm™ (patent pending) automatically sizes and formats the content, within certain constraints, to optimize its display on the page. For example, you can insert a new row for Activity Groups in the timeline, and the other rows will shrink to allow space for it, provided this can be achieved within the constraints. This allows you to think about and create / edit your plan without having to worry about the difficulties of formatting it and making it look good.

In order to fine tune the formatting, you can access and edit the pre-set constraints (which affect both sizing (i.e. height and width of objects) and formatting (i.e. what gets displayed, font sizes etc), through the page body and page header dialogues, and through the toolbar.

Key functionality:

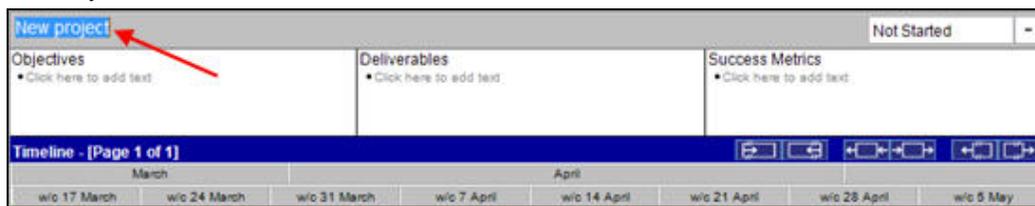
- To export outputs to PowerPoint® or PDF. Use the menus: File > Export Extract
 - This opens up a dialogue allowing you to select what to export into a PowerPoint® or PDF file.
 - Select what you want to export from the dialogue, and click the "Export" button.
 - Select a file type (e.g. PowerPoint® or PDF) and name, and click the "Save" button, and Swiftlight will export the pages you have selected to the file of your choice.
- To add new rows for Activity Groups on the timeline, right click and select "Add Timeline Row", or use the "Activity Group Rows" tab of the timeline formatting dialogue (see point 6 on page 2 of this document).
- In general, the timeline is very flexible with a number of display "modes" which allow you to choose how to display the content of your plan. You can either use the formatting dialogue to customize what you want to display on the timeline, or use the toolbar short-cuts to switch between different display modes.

3) Building Your First Plan

Building your first plan is quick and easy. The following four steps will get you going and give you a good "big picture" view of your plan.

STEP ONE: Open up Swiftlight and enter the Project Name and its Objectives in the top section of the Timeline

When you open Swiftlight and create a new file, you start in the Timeline view. Type in your project name in the space already highlighted for you.

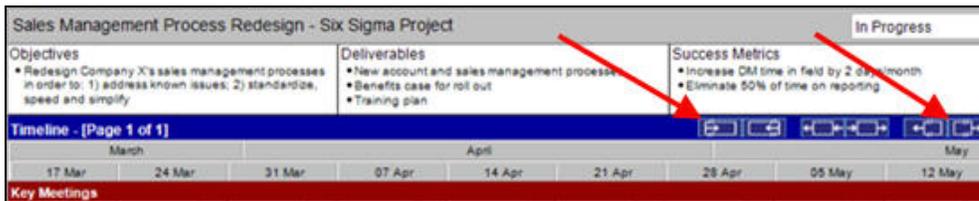


Next, in the boxes where it says "Click here to add text", click, and then type to add bullet points outlining the Objectives, Deliverables and Success Metrics of your project. If you don't want to add this information, you can either skip this step or use the format dialogue to stop displaying this section of the timeline.

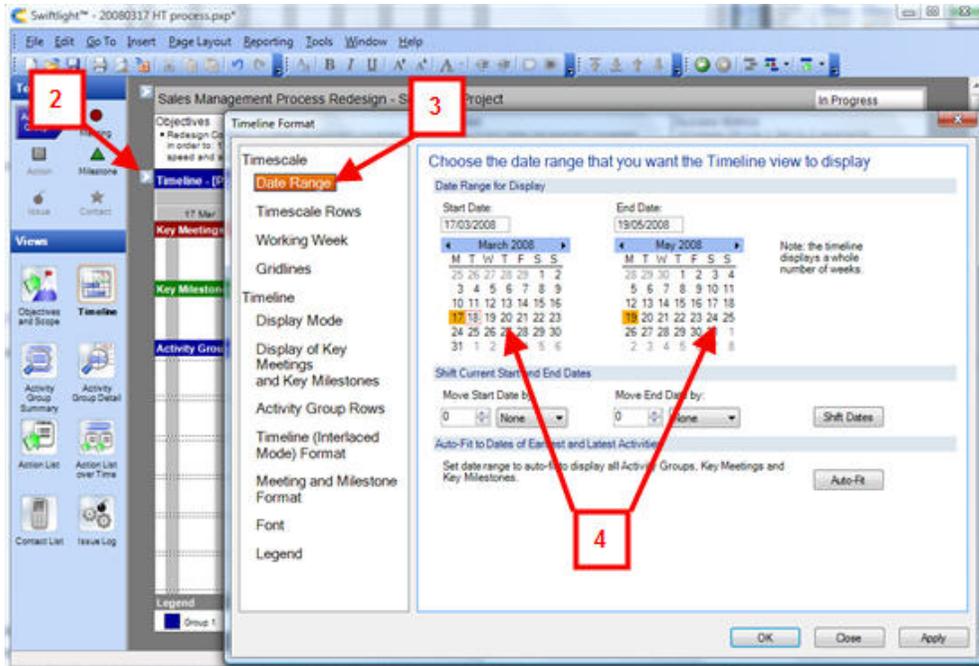
STEP TWO: Set the Date Range for the Plan in the Timeline view

When you first create a file, the Timeline view shows an 8 week date range starting from the current week. You can set the date range that you want for your project in two ways:

1) Use the shortcut buttons on the blue Timeline label row to either remove or add weeks to the date range;

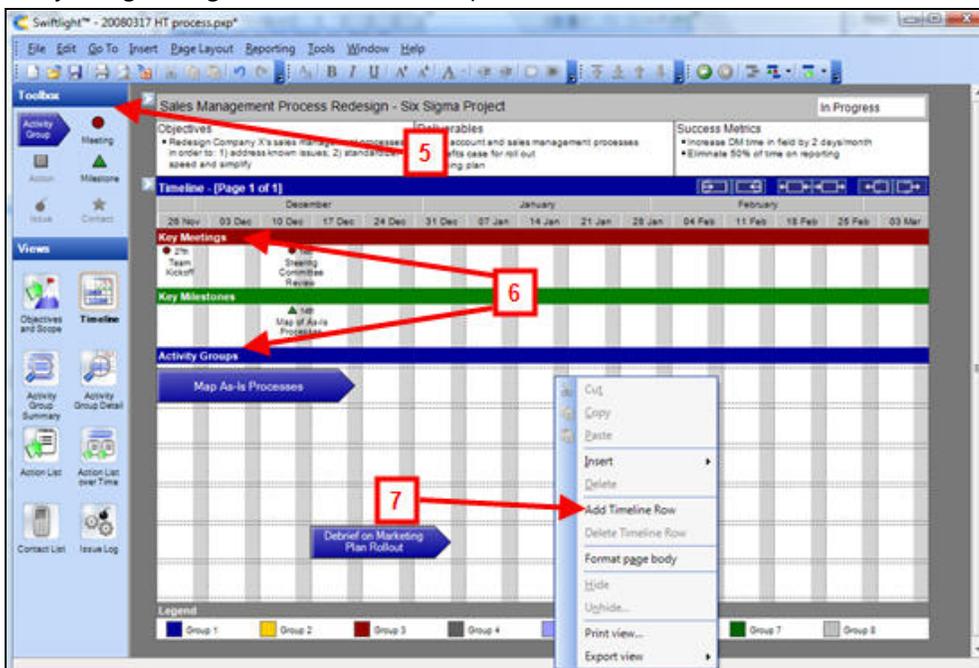


Or 2) Open the formatting dialogue by clicking on the white arrow icon (2), selecting the date range tab (3), and directly selecting the start and end dates (4).



STEP THREE: Add Key Meetings, Milestones and Activity Groups to the Timeline

Next, drag and drop Meetings, Milestones and Activity Groups from the toolbox (5) to the relevant sections of the page (6). Add text to give each of them the appropriate name, and drag and drop them to the right position on the page. (Note: the length of Activity Groups can be changed by grabbing the ends of the arrows and dragging them to the required length, or by using the right click menu to set specific dates).

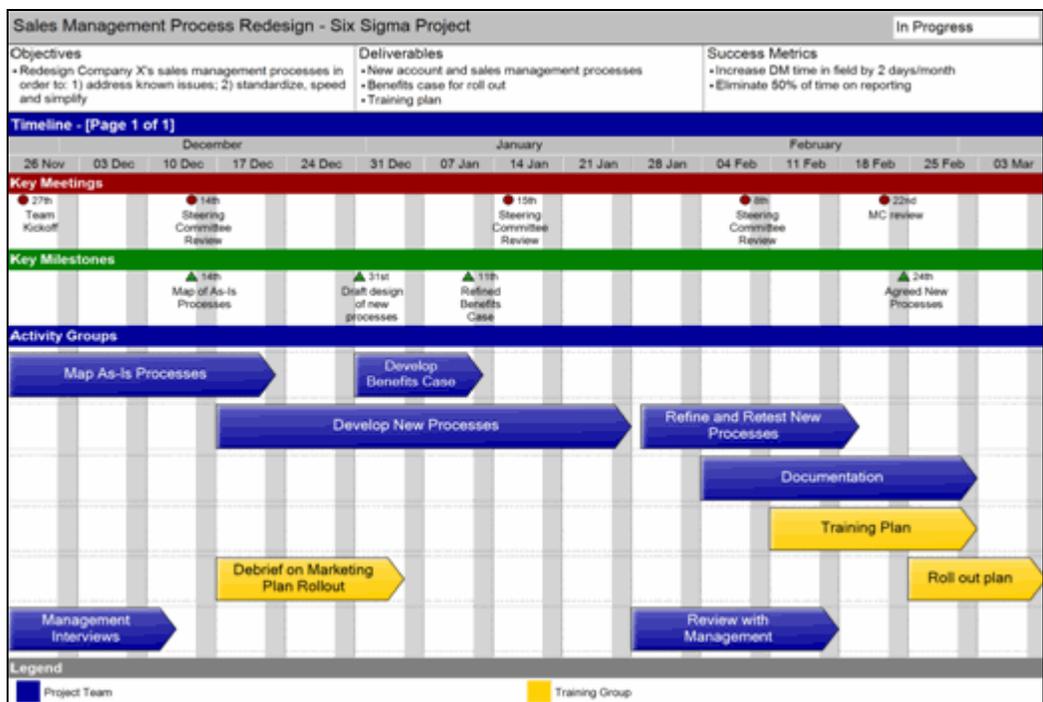


If you decide you need more (or fewer) rows for Activity Groups than the six that are there as the default, then you can use the right click menu (7) to add or delete Timeline rows. Alternatively, you can use the formatting dialogue (2 – see graphic under step two) and use the Activity Group Rows tab to set the desired number of rows.

Note: if Swiftlight detects that items would overlap on the timeline, it automatically reformats to prevent overlaps and at the same time try to keep the content on one page, thereby saving you from spending time and energy on basic formatting. For example: When you position a meeting, milestone or Activity Group in a way that overlaps with another one, Swiftlight will insert a new row and shrink row heights to try to keep all the contents on one page.

STEP FOUR: Tidy it up and you are done!

Now you can step back, look at your plan and tidy it up. Making changes such as adding more time to the date range, adding or moving activities, or colouring Activity Groups differently is fast and easy. And when you do make changes, Swiftlight will, if needed, automatically reformat the timeline to try to keep things on one page – so you don't have to worry about wasting time and energy on reformatting to accommodate your changes!



And now you are done!

With these four simple steps, you and Swiftlight have created a good "big picture" view of your plan in a clear, presentation-ready format. And it should have been both quick and easy!

From here, you can print it out, export it to MS PowerPoint® or PDF, or send it to someone for their review. When you are ready, you can go on to develop a more detailed plan using the Timeline and Swiftlight's other views. For example, for each Activity Group you can define deliverables, add tasks and assign responsibilities so that you can get to grips with the nitty-gritty of "who needs to do what by when" – the specific actions that will drive your project forward.

More Help / Training Resources

- We strongly recommend you review the [free tutorial videos](#).
- The "In Product Help" is a valuable training resource in itself. There is a section for every dialogue and the functionality of every view. Context specific help can be accessed by pressing F1 at any time when using Swiftlight.
- Visit our website, take the product tour and also look at the Support section. You may find the answers to your questions here.
- Contact the Torridon support team: support@torridonsolutions.com

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We hope the above information is helpful in getting you started and that you enjoy using Swiftlight. If you have any questions or feedback for us, please do not hesitate to contact us!

Everyone in the Swiftlight Team, Torridon Solutions