

WEST CASE TIMELINE USER GUIDE

AUGUST 2010



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WEST CASE TIMELINE USER GUIDE

AUGUST 2010

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Reference Materials

To browse and order free West Case Timeline reference materials, visit west.thomson.com/support/user-guide/case-timeline.aspx. West Case Timeline also contains valuable online Help.

About This Guide

In this guide, the graphics and step-by-step instructions are based on using West Case Timeline. Because of the evolving nature of this technology, there may be changes to interfaces and functionality that are not reflected in this documentation.

Information in this guide is current through August 15, 2010 (version 2.5).

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1 Introduction

West Case Timeline provides tools for creating timeline charts for a wide variety of chronological data. With West Case Timeline, you can

- enter all your event data on one page or import data from other applications
- enter unlimited notes, specify sources, and define your own data fields
- group and color-code events and categories
- analyze data by people, location, and source
- link to external files, including documents, audio files, video files, PDF files, picture files, and Web sites, directly from the timeline
- spell-check using general, legal, and medical dictionaries
- create multiple charts for each timeline file
- choose from chronology, bar chart, and flag chart formats
- create your own chart themes or choose from built-in templates
- customize event styles and add annotations, graphics, backgrounds, and watermarks
- download to graphic, PDF, or HTML files
- print on any size paper and on any printer, including large format printers
- use the built-in presentation mode to walk through your timeline
- integrate with Microsoft PowerPoint
- create a timeline from a Westlaw PeopleMap report

2 Working with Timeline Files

With West Case Timeline, you

- create a timeline file by entering events
- choose a timeline format: chronology, bar chart, or flag chart
- create a presentation

Creating a Timeline File

The first time you access West Case Timeline, the start-up dialog box is displayed (Figure 2-1).



Figure 2-1. Start-up dialog box

Note If you do not want the start-up dialog box displayed every time you access West Case Timeline, clear the **Show this every time** check box.

To create a timeline, click **Create a New Timeline**. The Event Entry tab is displayed. For information on entering events, see “Working with Events” on page 4.

To create a new timeline during a session or if you choose not to display the start-up dialog box, choose **New** from the File menu.

Saving a Timeline File

To save a timeline file, choose **Save** from the File menu. If this is the first time you are saving your West Case Timeline file, the Save As dialog box is displayed. Type a name for the file in the *File name* text box and click **Save**. By default, your files are saved in the My Timelines folder within the My Documents folder.

Opening a Timeline File

To open an existing timeline file, click **Open an Existing Timeline** in the start-up dialog box, or choose **Open** from the File menu. The Open dialog box is displayed. Select the file you want to open and click **Open**.

Exporting Timelines

The West Case Timeline Export feature allows you to export your timeline data so it can be opened in another program. You can convert timeline events into the following file types:

- CSV (comma delimited file)
- TAB (tab delimited file)
- TXT (tab delimited text file)

To export your timeline events, complete these steps:

1. Choose **Export** from the File menu. The Export dialog box is displayed.
2. Type a name for the file in the *File name* text box.
3. Choose a file type from the *Save as type* drop-down list.
4. Click **Save**.

3 Working with Events

The Event Entry tab is displayed when you access West Case Timeline (Figure 3-1). You can add, modify, or delete events and categories. You can also select and sort data for inclusion in the chronology, bar chart, and flag chart.

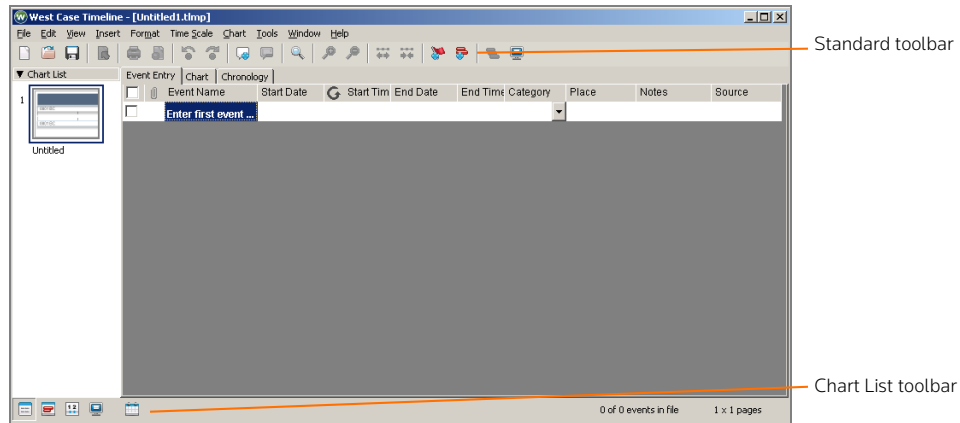


Figure 3-1. Event Entry tab

The Event Entry tab contains 12 different columns:

- **Check Box:** Indicates whether an event is shown in the chronology and charts.
- **Linked File (U):** Indicates that the event has a linked file (i.e., document, image, audio, e-mail, video, or URL).
- **Event Name:** The name of the event as it will appear in the chronology and charts.
- **Start Date:** The date the event began.
- **Recurring Event (G):** Indicates that the event is a recurring event.
- **Start Time:** The time the event began.
- **End Date:** The date the event ended.
- **End Time:** The time the event ended.
- **Category:** The category assigned to each event for grouping purposes.
- **Place:** The location where the event occurred.
- **Notes:** The details of the event.
- **Source:** The source of your information.

Note You can rename the *Place*, *Notes*, and *Source* columns. To rename a column, right-click the column heading to display the Rename Column dialog box. Type a different name in the *Name* text box and click OK.

Entering Events

To enter an event, follow these steps:

1. On the Event Entry tab (Figure 3-2), type a name for the event, e.g., **Receives Performance Improvement Plan (PIP) from Homer Plastics**, in the *Event Name* column. To move to the next column, press **Tab**.

2. Type the date the event began in the *Start Date* column, or click the **Calendar** icon (📅) to select the date. For information on entering dates, see Appendix B.
3. Type the time the event began in the *Start Time* column, if desired.
4. Type the date the event ended in the *End Date* column, or click the **Calendar** icon (📅) to select the date. For information on entering dates, see Appendix B.
5. Type the time the event ended in the *End Time* column, if desired.
6. Type a category, e.g., **Former employment**, in the *Category* column.
7. Type the location where the event occurred in the *Place* column, if desired.
8. Type a note in the *Notes* column, if desired.
9. Type the source for your information in the *Source* column, if desired.

To enter another event, press **Enter** or click the **Add Event** button (📅) on the Standard toolbar. Then repeat steps 1–9.

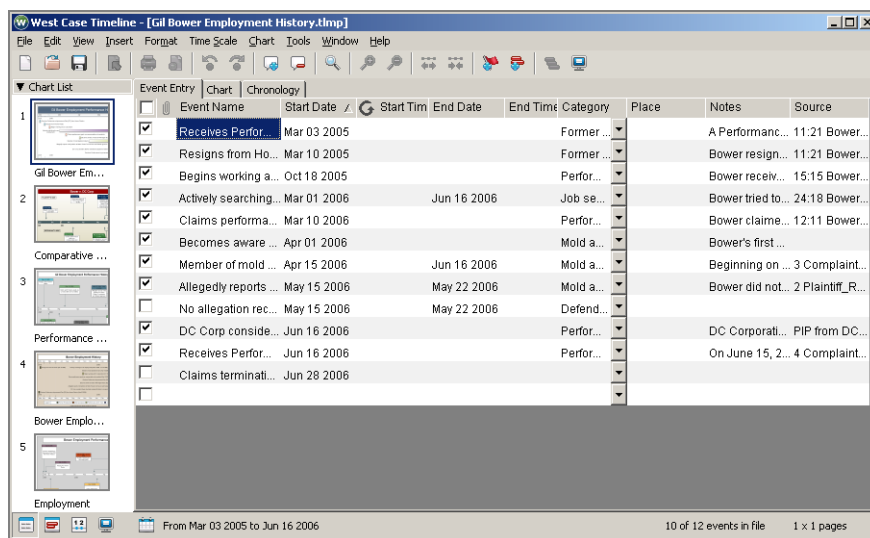


Figure 3-2. Event Entry tab

ENTERING RECURRING EVENTS

If an event recurs with regular frequency, you can have West Case Timeline enter the recurring dates automatically. To enter recurring dates for an event, follow these steps:

1. Click in the *Start Date* column next to the event to display the Calendar icon.
2. Click the **Calendar** icon to display the calendar (Figure 3-3).

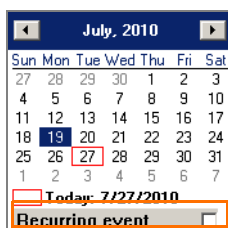


Figure 3-3. Calendar

3. Select the check box next to *Recurring event*. The Recurrence dialog box is displayed (Figure 3-4).

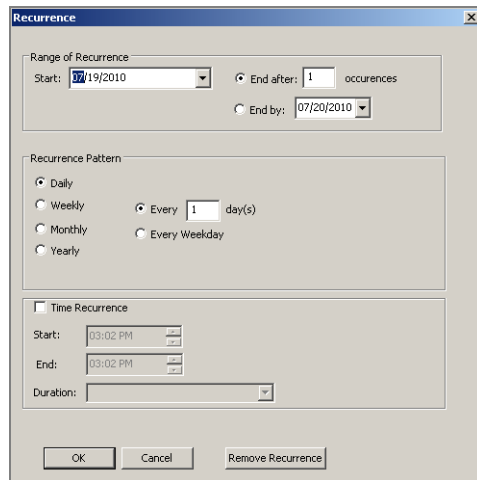


Figure 3-4. Recurrence dialog box

4. By default the current date is displayed in the *Start* text box. If necessary, type a different date in the text box or click the arrow to select a different date from a calendar.
5. Select the recurrence pattern and the time recurrence, if desired.
6. Click **OK**. The Recurring Event icon (🕒) is displayed in the *Recurring Event* column next to the event on the Event Entry tab.

To remove recurring dates from an event, double-click the **Recurring Event** icon for the event to display the Recurrence dialog box and click **Remove Recurrence**.

Importing Events

You can import events into West Case Timeline from the following types of files:

- ASC (text only file)
- CSV (comma delimited file)
- TAB (tab delimited file)
- TXT (tab delimited text file)

Notes

- The imported file must contain at least one event and a date.
- All events are imported into the current timeline file, but they are displayed only in the chart currently selected in the Chart List. If you want to display the imported events in another chart, you must select the chart in the Chart List, then click the **Event Entry** tab and select the check boxes next to the events you want to display.

To import events into West Case Timeline, complete these steps:

1. Choose **Import** from the File menu. The Open dialog box is displayed.
2. Choose a file type from the *Files of type* drop-down list.

3. Select the file you want to import and click **Open**. The Event Import Wizard–Step 1 dialog box is displayed (Figure 3-5).

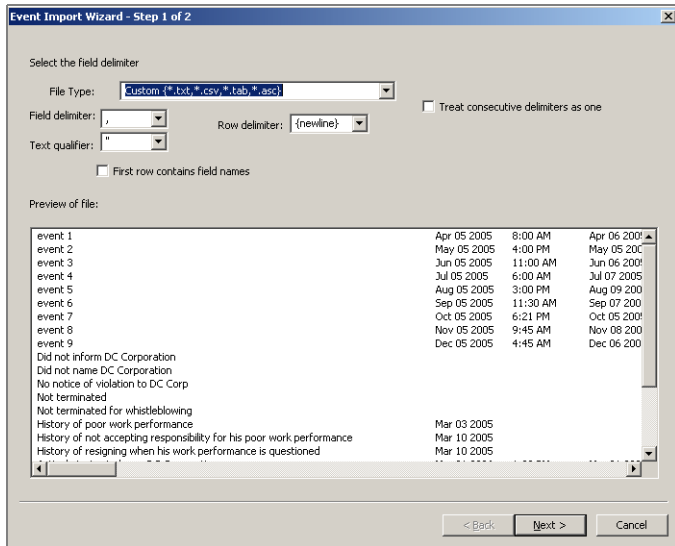


Figure 3-5. Event Import Wizard–Step 1 dialog box

4. The file type, field delimiter, row delimiter, and text qualifier are automatically entered for you. The *First row contains field names* check box is selected, if appropriate. Click **Next**. The Event Import Wizard–Step 2 dialog box is displayed (Figure 3-6).

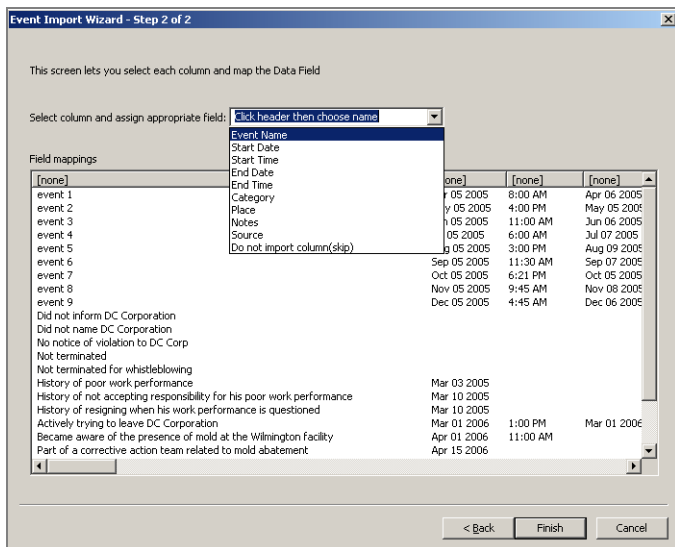


Figure 3-6. Event Import Wizard–Step 2 dialog box

5. Assign a name to each field in the file by mapping the field. For example, to map the first field, which contains the event name, in Figure 3-6, select the field by clicking **[none]** at the top of the first column. Then choose **Event Name** from the drop-down list. Repeat this process for each field you want to map.
6. If you do not want to import a field, select the field and then choose **Do not import column (skip)** from the drop-down list.

- Click **Finish**. The message *Would you like to view import results?* is displayed. Click **Yes** if you want to display a dialog box summarizing the results of the import.
- If you clicked **Yes** in step 7, the Import_log.txt–Notebook dialog box is displayed. Click the **Close** button. The events are displayed on the Event Tab.

Note If you import a West Case Timeline file, the fields are automatically mapped for you.

Importing Key Facts from West Case Notebook

You can import key facts from West Case Notebook and display them as events on the Event Entry tab in West Case Timeline. For more information on West Case Notebook, refer to the *West Case Notebook User Guide*, which can be downloaded at west.thomson.com/support/user-guide/livenote-case-notebook.aspx.

To import key facts from West Case Notebook, complete these steps:

- Access West Case Notebook.
- Select the check boxes next to the key facts you want to import into West Case Timeline (Figure 3-7).

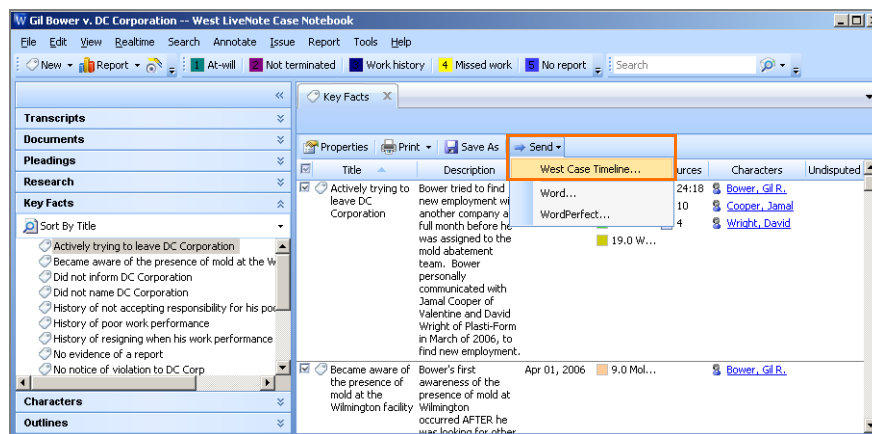


Figure 3-7. Selected key facts in West Case Notebook

- Click **Send** on the toolbar above the key facts, then choose **West Case Timeline** from the menu.
- If West Case Timeline is not open when you send the key facts, West Case Timeline opens automatically and creates a new timeline file for you. The message *Would you like to view import results?* is displayed. Click **Yes** if you want to display a dialog box summarizing the results of the import.
- If you clicked **Yes** in step 4, the Import_log.txt–Notebook dialog box is displayed. Click the **Close** button. The key facts are displayed on the Event Entry tab.


Notes

- If you are working in one or more timelines when you send the key facts, the key facts are displayed in the last timeline you accessed.
- If you modify a key fact in West Case Notebook, you must resend the key fact to West Case Timeline to update the event. Only the modified information in the key fact is sent to West Case Timeline.

Editing an Event

To edit an event, click in the field containing the information you want to change and type your changes.

Deleting an Event

To delete an event, click in a field of the event you want to delete, then click the **Delete Event** button  on the Standard toolbar.

Selecting Events

There are several ways to select an event or a group of events on the Event Entry tab:


- To select one event, click in a field of the event you want to select. Only one field needs to be highlighted to select the event.
- To select a sequence of events, drag the pointer over the events you want to select. In the alternative, select one event, then hold down the **Ctrl** key while pressing the **Up Arrow** or **Down Arrow** key to select the remaining events.
- To select nonsequential events, select one event, then hold down the **Ctrl** key while selecting the remaining events.
- To select all events in the file, choose **Select All** from the Edit menu.
- To select all events in a specific category, choose **Select by Category** from the Edit menu, then choose the category from the submenu.
- To select events using specified search criteria, choose **Search/Select** from the Edit menu to display the Search dialog box. For more information on the Search/Select feature, see "Using Search/Select" on page 12.

Sorting Events

To sort a list of events in ascending order, click the heading of the column you want to sort by. Click the same column heading again to sort the list in descending order.

Formatting Columns

You can format columns in the following ways:

- To change the position of a column, drag the column heading to the desired position.
- To change the width of a column, point to the end of the column heading. When the pointer becomes a double-headed arrow () , drag it to the right or left.
- To rename the *Place*, *Notes*, or *Source* column, right-click the column heading to display the Rename Column dialog box. Type a different name in the *Name* text box and click **OK**.

Modifying Categories

You can assign categories to events in order to group related events in your report and charts. To modify categories while viewing the Event Entry tab, choose **Category Names** from the Edit menu to display the Edit Category Names dialog box. You can then modify a category in the following ways:

- To add a new category, click **New** to display the New Category dialog box. Type a new category name in the text box and click **OK**. The category is listed in the Edit Category Names dialog box. Click **OK**.
- To delete a category, select the category you want to delete and click **Delete**. The message *Delete [category name]?* is displayed. Click **OK**, then click **OK** in the Edit Category Names dialog box.
- To rename a category, select the category you want to rename and click **Rename**. The Rename Category dialog box is displayed. Type a different name in the text box and click **OK**. The category is listed in the Edit Category Names dialog box. Click **OK**.

Saving Categories

You can transfer categories to other timelines by saving the categories to a file and then adding the categories to a different timeline.

SAVING CATEGORIES TO A FILE

To save categories to a file, complete these steps:


1. Choose **Category Names** from the Edit menu. The Edit Category Names dialog box is displayed.
2. Click **Save**. The Save As dialog box is displayed.
3. Type a file name for the categories in the *File name* text box.
4. Choose a file type from the *Save as type* drop-down list. If you want to open the file in another timeline, choose **West Case Timeline Category File (*.ctg)** from the list.
5. Click **Save**. The Edit Category Names dialog box is redisplayed. (By default, the file is saved in *C:\Documents and Settings\My Documents\My Timelines\Categories*.)
6. Click **OK**.

ADDING SAVED CATEGORIES

To add saved categories to a timeline, complete these steps:

1. Choose **Category Names** from the Edit menu. The Edit Category Names dialog box is displayed.
2. Click **Open**. The Open dialog box is displayed.
3. Select the **CTG** file you want to open and click **Open**. The Categories to Add dialog box is displayed.
4. Click **OK**. The categories are listed in the Edit Category Names text box.
5. Click **OK**.

Linking Files to Events

West Case Timeline allows you to link files to an event to show additional information about the event. You can link documents, images, audio files, e-mails, videos, and Web sites. When you link a file to an event, a paper clip icon  is displayed in the Linked File column on the Event Entry tab. An icon specific to the file type is also displayed next to the event on the Chart tab.

ADDING A LINKED FILE

To link a file to an event, complete the following steps:

1. Select the event to which you want to link the file.
2. Choose **Link** from the Insert menu. The Linked Files dialog box is displayed.
3. Click **Add**. The Add Linked File dialog box is displayed (Figure 3-8).

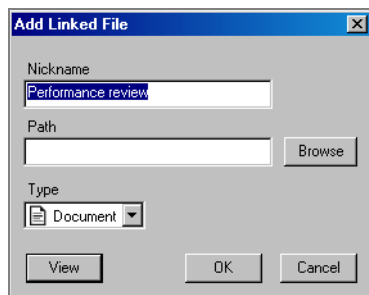


Figure 3-8. Add Linked File dialog box

4. Type a name for the file in the *Nickname* text box.

5. Click **Browse** to display the Add Attachments dialog box.
6. Select the file you want to link and click **Open**. The Add Linked File dialog box is redisplayed. Choose a file type from the *Type* drop-down list.
7. Click **OK**. The Linked Files dialog box is redisplayed with the linked file.
8. Click **OK**.

EDITING A LINKED FILE

To edit a linked file, complete these steps:

1. Select the event with the linked file you want to edit.
2. Choose **Link** from the Insert menu. The Linked Files dialog box is displayed.
3. Select the file you want to edit and click **Edit**. The Edit Linked File dialog box is displayed.
4. Make the desired changes and click **OK**. The Linked Files dialog box is redisplayed.
5. Click **OK**.

DELETING A LINKED FILE

To delete a linked file, complete these steps:

1. Select the event with the linked file you want to delete.
2. Choose **Link** from the Insert menu. The Linked Files dialog box is displayed.
3. Select the file you want to delete and click **Remove**. The file is removed from the list.
4. Click **OK**.

VIEWING A LINKED FILE

To view a linked file, point to the paper clip icon on the Event Entry tab or the file icon on the Chart tab to display the nickname for the file. Click the nickname to display the file.

Linking Source Documents

You can create a link to a source document to quickly access the document from the Event Entry tab, a chart, or the chronology.

LINKING A SOURCE DOCUMENT

To create a link to a source document, complete these steps:

1. On the Event Entry tab, right-click the source in the *Source* column to which you want to add a link.
2. Choose **Insert Hyperlink** from the menu. The Insert Source Link dialog box is displayed.
3. Click **Browse**. The Add Attachments dialog box is displayed.
4. Select the source document and click **Open**. The Insert Source Link dialog box is redisplayed with the linked document.
5. Click **OK**.

VIEWING A SOURCE DOCUMENT

You can view a source document in any of the following ways:

- On the Event Entry tab, click the source in the *Source* column.

- In a flag chart or bar chart, point to the event with the link to a source document until the information icon (i) is displayed. Click the icon, then click the link to the source document (shown outlined in Figure 3-9).

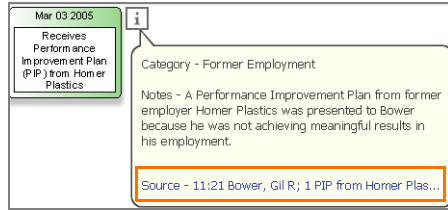


Figure 3-9. Link to source document

- On the Chronology tab, click the link to the source document in the *Source* column.

Using Search/Select

With the West Case Timeline Search/Select feature, you can select subsets of events based on their date and content.

PERFORMING A SIMPLE SEARCH

To select events based on their content, perform a simple text search by completing these steps:

1. From the Edit menu, choose **Search/Select**. The Search dialog box is displayed (Figure 3-10).

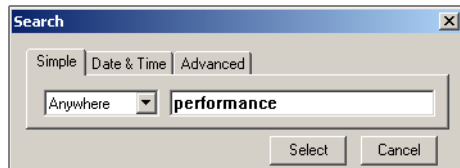


Figure 3-10. Search dialog box

2. Choose a column from the drop-down list, or choose **Anywhere** to search all columns.
3. Type your search term, e.g., **performance**, in the text box.
4. Click **Select**. All events matching the search criteria are selected.

PERFORMING A DATE AND TIME SEARCH

To select events based on a date and time, complete these steps:

1. From the Edit menu, choose **Search/Select**. The Search dialog box is displayed.
2. Click the **Date and Time** tab (Figure 3-11).

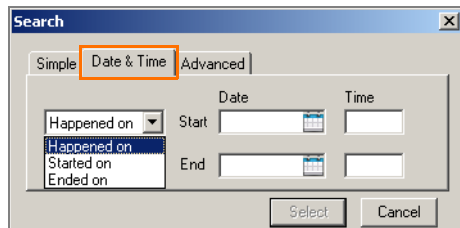


Figure 3-11. Search dialog box–Date and Time tab

3. Choose an option from the drop-down list.
4. Type a date in the *Start Date* text box, the *End Date* text box, or both text boxes.

5. If desired, type a time in the *Start Time* text box, the *End Time* text box, or both text boxes.
6. Click **Select**. All events matching the search criteria are selected.

PERFORMING AN ADVANCED SEARCH

To select events based on their content and a date and time, perform an advanced search by completing these steps:

1. From the Edit menu, choose **Search/Select**. The Search dialog box is displayed.
2. Click the **Advanced** tab (Figure 3-12).

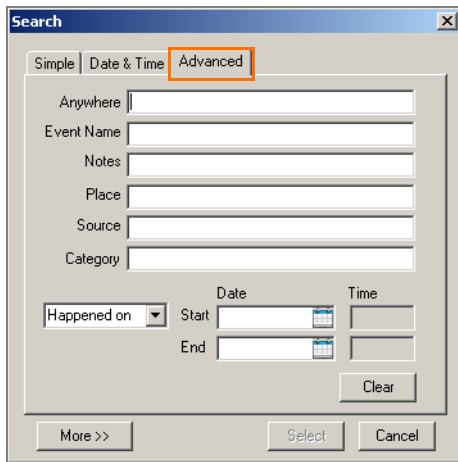


Figure 3-12. Search dialog box–Advanced tab

3. Type your search terms in the desired text boxes.
4. Choose an option from the drop-down list.
5. Type a date in the *Start Date* text box, the *End Date* text box, or both text boxes.
6. If desired, type a time in the *Start Time* text box, the *End Time* text box, or both text boxes.
7. Click **More** to access further search features, if desired.
8. Click **Select**. All events matching the search criteria are selected.

4 Working with the Chronology

The chronology is a formatted text report of the events in the timeline. To view the chronology, click the **Chronology** tab (Figure 4-1).

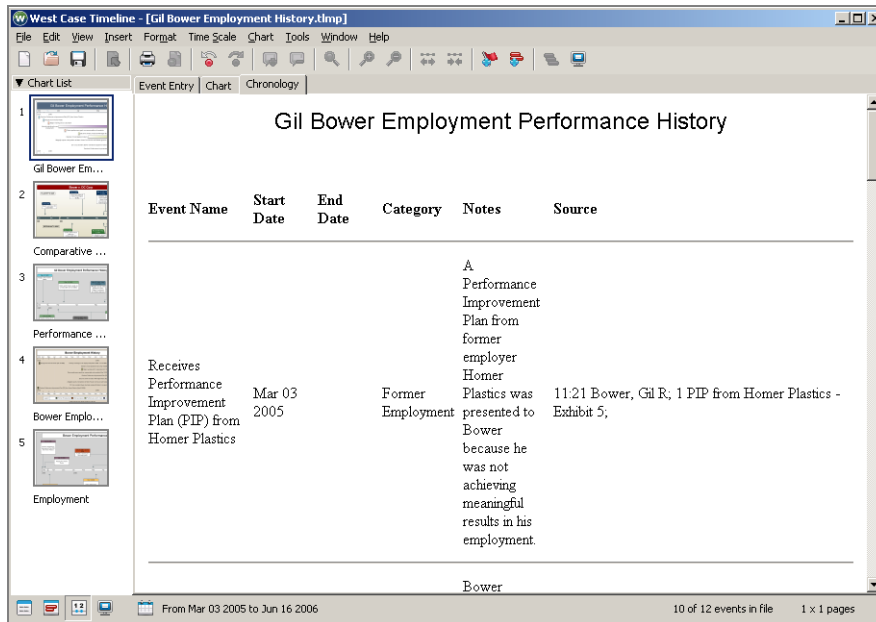


Figure 4-1. Chronology

Customizing the Chronology

INCLUDING COLUMNS

The chronology can include any of the columns available on the Event Entry tab. By default, all columns are included in the chronology. To add or remove a column on the Chronology tab, choose **Chronology** from the View menu, then choose the column from the submenu (Figure 4-2). A check mark next to a column name indicates it is included in the report.

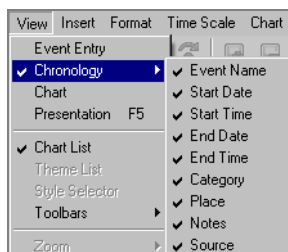


Figure 4-2. View menu

CHANGING THE COLUMN ORDER

The column order on the Chronology tab is the same as the column order on the Event Entry tab. To change the column order, click the **Event Entry** tab, then drag each column heading to the desired position.

INCLUDING EVENTS

The events listed in the chronology are the events selected on the Event Entry tab. To include particular events in the chronology, click the **Event Entry** tab, then select the check boxes next to the events you want to include. To select all events, select the **Select All** check box at the top of the Check Box column on the Event Entry tab.

To remove an event from the chronology, clear its check box on the Event Entry tab.

USING TIME SCALE DATE RANGE

The Time Scale Date Range feature allows you to include only those events that occur within a defined date range. To set the date range, choose **Date Range** from the Time Scale menu to display the Time Scale dialog box (Figure 4-3). Select **Manual** on the Date Range tab, then type the date and time ranges in the appropriate text boxes and click **OK**.

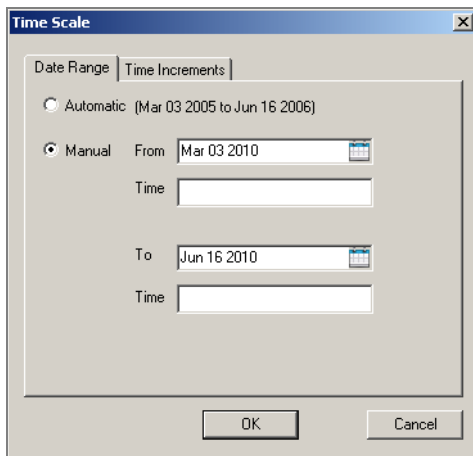



Figure 4-3. Time Scale dialog box–Date Range tab

5 Creating Charts

Creating a Bar Chart

The bar chart is a graphical representation of the data in your timeline file (Figure 5-2). Each event included in the chart is assigned a bar, whose length is based on the event's time span and whose position is based on the date and time the event occurred.

To create a bar chart, complete these steps:

1. Enter your events on the Event Entry tab.
2. Click the **Create New Bar Chart** button  on the Standard toolbar. The West Case Timeline dialog box is displayed (Figure 5-6).

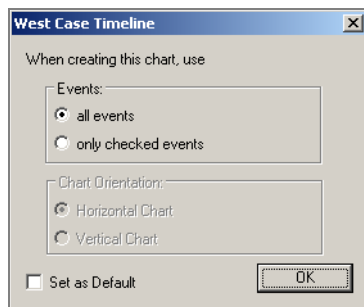


Figure 5-1. West Case Timeline dialog box

3. Under *Events*, **all events** is selected by default. Select **only checked events**, if desired.
4. Select the **Set as Default** check box, if desired.
5. Click **OK**.

6. A thumbnail of the chart is displayed in the Chart List in the left pane. (For more information on using the Chart List, see "Working with the Chart List" on page 32.) The full chart is displayed on the Chart tab in the right pane.

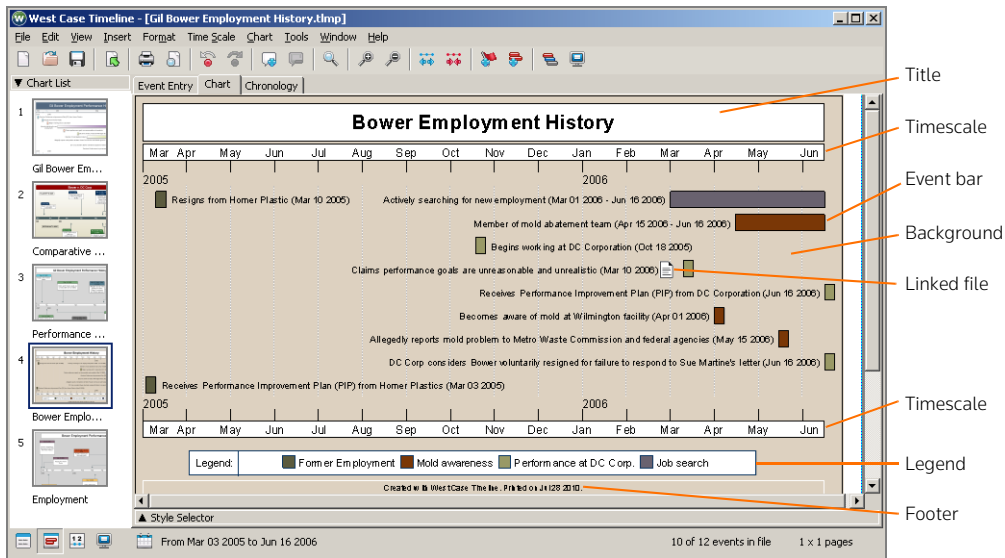


Figure 5-2. Bar chart

ARRANGING EVENTS

You can arrange events on the bar chart in the following ways:

- To arrange events in a staircase layout, where each event is placed on its own line in a staircase fashion, click the **Auto-Arrange Events** button (📅) on the Standard toolbar. The Auto Arrange Events dialog box is displayed (Figure 5-3). By default, *Staircase* is selected for you. Select **All Events** and click **OK** to display the chart (Figure 5-4).

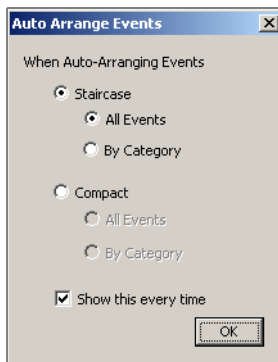


Figure 5-3. Auto Arrange Events dialog box

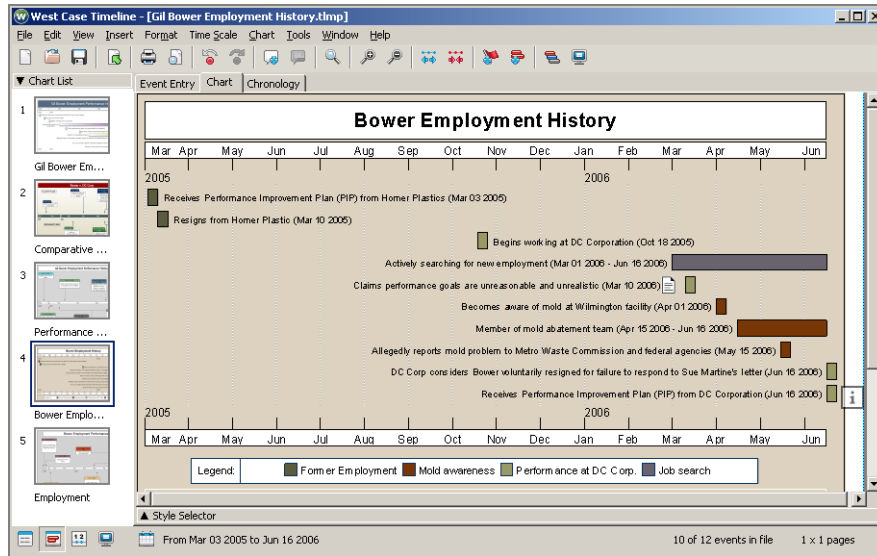



Figure 5-4. Bar chart–staircase layout

- You can arrange the events in a compact layout to save space on your chart. To arrange the chart in a compact layout, click the **Auto-Arrange Events** button  on the Standard toolbar to display the Auto Arrange Events dialog box. Select **Compact** and **All Events** and click **OK** to display the chart (Figure 5-5).

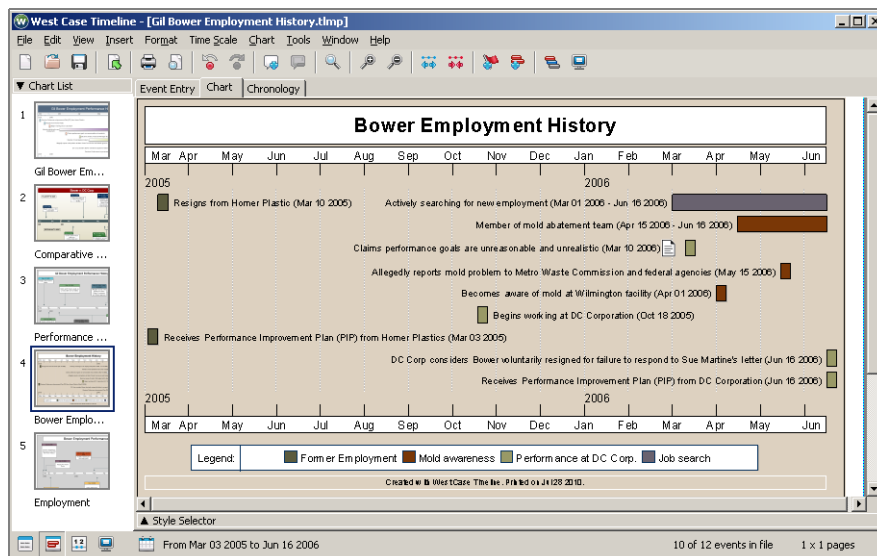



Figure 5-5. Bar chart–compact layout

- You can sort your events by category in both the staircase and compact layouts. For example, to arrange all events by category in a staircase layout, click the **Auto-Arrange Events** button  on the Standard toolbar to display the Auto Arrange Events dialog box. Select **Staircase**, if it is not already selected, then select **By Category** and click **OK**.
- You can move events vertically on the chart. To move an event, simply drag it to the desired position.

To change the auto-arrange default settings, choose **Options** from the Tools menu to display the Options dialog box. Click the **Chart** tab, then choose an option from the *Auto-Arrange Events (Bar Chart)* drop-down list and click **OK**.

POSITIONING EVENT TEXT

To change the position of the event text in relation to the event bar, right-click the event and choose **Event Text Position** from the menu, then choose **Inside Event**, **Right of Event**, or **Left of Event** from the submenu.

Creating a Flag Chart

Like the bar chart, the flag chart is a graphical representation of the data in your timeline file. Events are placed in boxes connected by arrows to the timescale. You can create a flag chart with the events positioned either horizontally or vertically.

To create a flag chart, complete these steps:

1. Enter your events on the Event Entry tab.
2. Click the **Create New Flag Chart** button (🚩) on the Standard toolbar. The West Case Timeline dialog box is displayed (Figure 5-6).

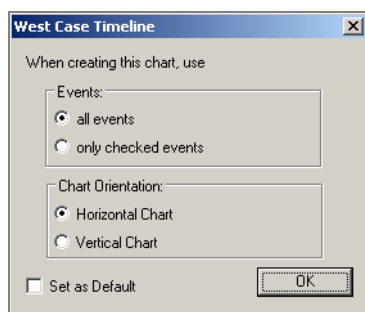


Figure 5-6. West Case Timeline dialog box

3. Under *Events*, *all events* is selected by default. Select **only checked events**, if desired.
4. Under *Chart Orientation*, **Horizontal Chart** is selected by default. Select **Vertical Chart**, if desired.
5. Select the **Set as Default** check box, if desired.
6. Click **OK**.
7. A thumbnail of the chart is displayed in the Chart List in the left pane. (For more information on using the Chart List, see “Working with the Chart List” on page 32.) The full chart is displayed on the Chart tab in the right pane (Figure 5-7 and Figure 5-8).

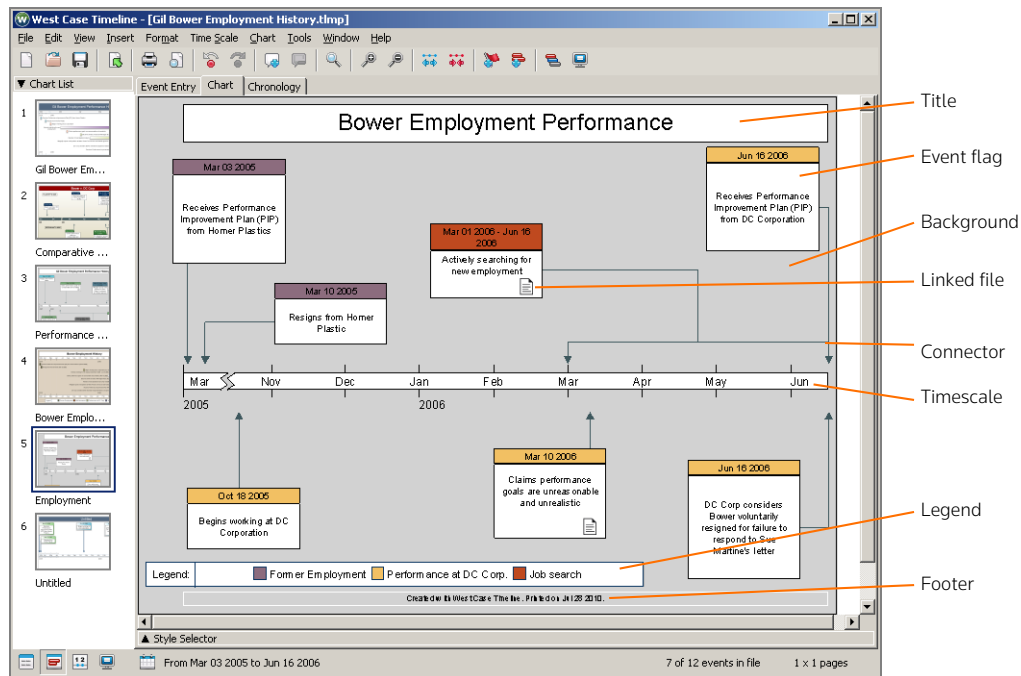


Figure 5-7. Horizontal flag chart

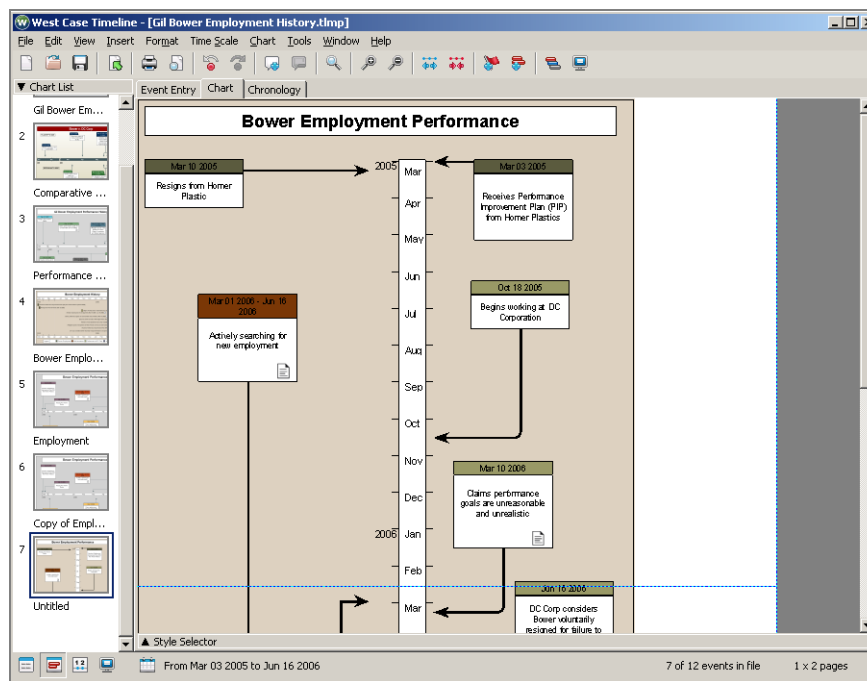


Figure 5-8. Vertical flag chart

ARRANGING EVENTS

The timescale in the flag chart is positioned in the middle of the first page. Events are placed on one side of the timescale, next to the date and time they occurred. If there is no room on that side of the timescale, the event is placed on the other side of the timescale. You can position an event anywhere on the chart. To move an event on the chart, drag it to the position you want.

6 Creating a Timeline from Westlaw PeopleMap

When you create a report in Westlaw PeopleMap, you can export the data into West Case Timeline. For further information about Westlaw PeopleMap, download a free copy of *Westlaw PeopleMap* at west.thomson.com/support/user-guide/westlaw/records.aspx.

To create a report in Westlaw PeopleMap and export the data into West Case Timeline, complete these steps:

1. Access Westlaw.
2. Add the tabbed PeopleMap page, if necessary. Then click the **PeopleMap** tab (Figure 6-1). For further information on adding tabbed pages, download a free copy of the *Westlaw User Guide* at west.thomson.com/support/user-guide/westlaw/gen-info.aspx.

The screenshot shows the Westlaw PeopleMap search interface. At the top, there is a navigation bar with links like 'FIND & PRINT', 'KEYCITE', 'DIRECTORY', 'KEY NUMBERS', 'COURT DOCS', 'FORMFINDER', 'SITE MAP', 'HELP', and 'SIGN OFF'. Below this is a sub-header with 'Westlaw' and 'PeopleMap' tabs. The main content area is titled 'What do you know about the person?' and includes a search form with fields for Last Name, First Name, Street Address, City, State, Zip Code, SSN, Last 4 Digits of SSN, Year of Birth, and Age Range. The 'Permissible Uses' section is also visible, with options for GLB, DPPA, and VOTERS, each with a 'Keep' checkbox.

Figure 6-1. Tabbed PeopleMap page

3. At the PeopleMap page, type the individual's first name and last name or Social Security number in the *What do you know about the person?* section. (You can add address information, the year of birth, or an age range to narrow your search.)
4. Choose the appropriate items from the *Permissible Uses* drop-down lists.

- Click **Next**. The Results page is displayed (Figure 6-2).

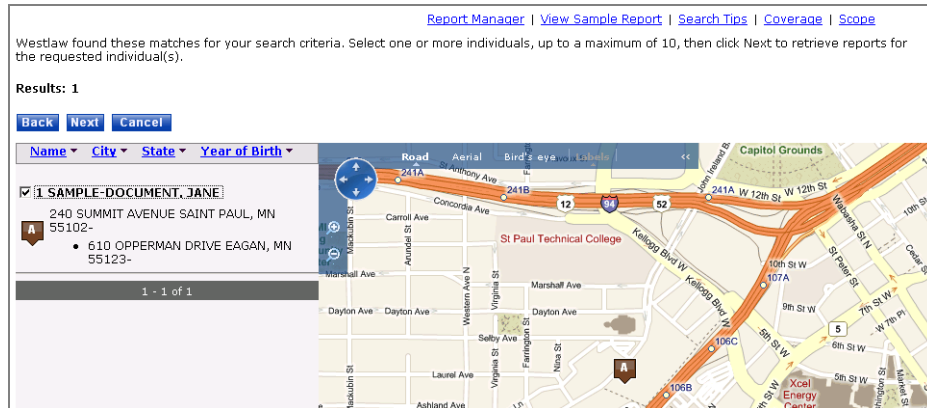


Figure 6-2. Results page

- The left frame of the Results page lists the names and current addresses of the individuals who match your search criteria. Select the check box next to the name of the individual for whom you want to create a report, then click **Next**. The information is presented in an interactive graphical display (Figure 6-3).

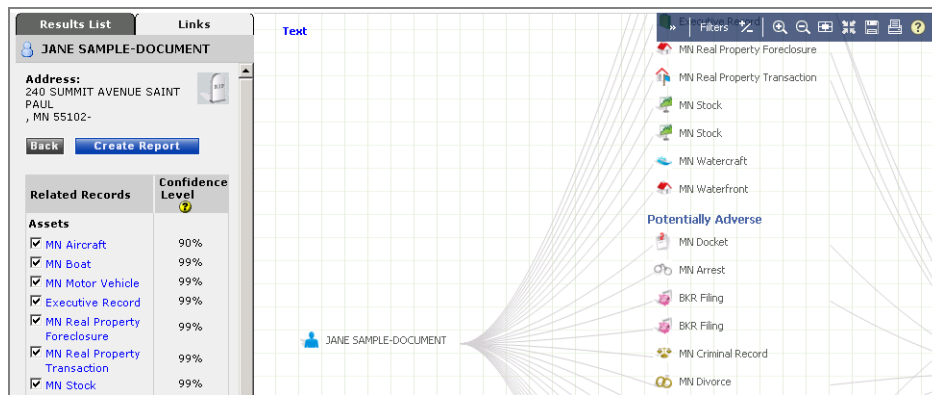


Figure 6-3. Interactive graphical display for Jane Sample-Documents

7. Click **Create Report** in the left frame. The Report Confirmation page is displayed (Figure 6-4).

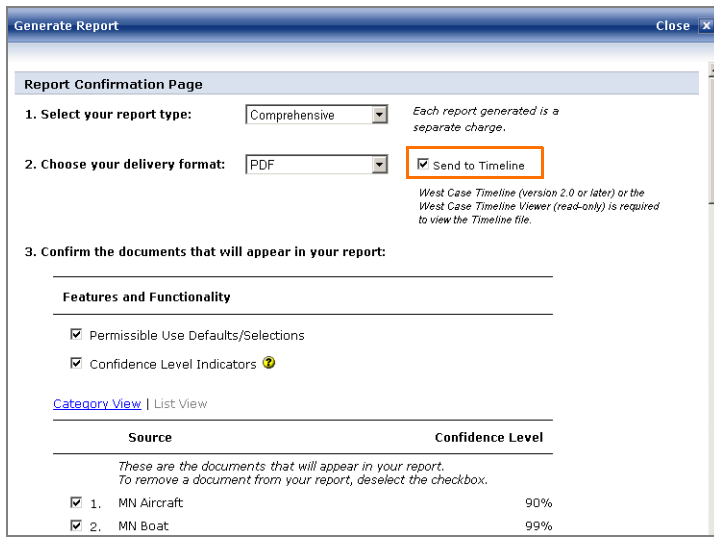


Figure 6-4. Report Confirmation page

8. Choose **Comprehensive, Core, Asset Only, or Potentially Adverse** from the *Select your report type* drop-down list.
9. Choose **PDF, Word, WordPerfect, HTML, or Excel** from the *Choose your delivery format* drop-down list.
10. Select the **Send to Timeline** check box, shown outlined in Figure 6-4.
11. In the *Confirm the documents that will appear in your report* section, clear the check boxes next to items you do not want to include in the report.
12. In the *Additional Report Sections* section, clear the check boxes next to items you do not want to include in the report.
13. In the *Additional Information May Be Available For Your Report Subject* section, select the appropriate check boxes to include information about neighbors at current addresses and previous addresses, previous residents, and potential relatives in the report. Click **Go**. The Download Confirmation dialog box is displayed (Figure 6-5).

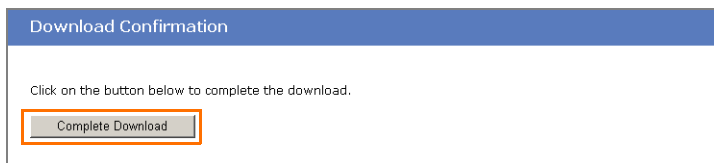


Figure 6-5. Download Confirmation dialog box

14. Click **Complete Download**. The File Download dialog box is displayed (Figure 6-6).

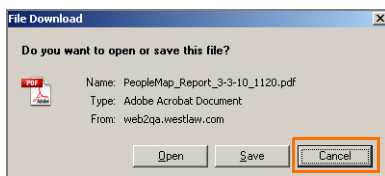


Figure 6-6. File Download dialog box

15. Click **Cancel**. The Downloading dialog box is displayed (Figure 6-7).

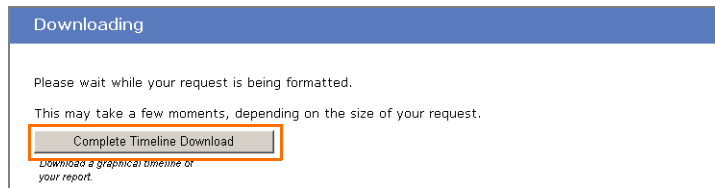


Figure 6-7. Downloading dialog box

16. Click **Complete Timeline Download**. The File Download dialog box is redisplayed.
17. Click **Open**. West Case Timeline opens and the Westlaw PeopleMap report is displayed as a chart in the right pane (Figure 6-8).

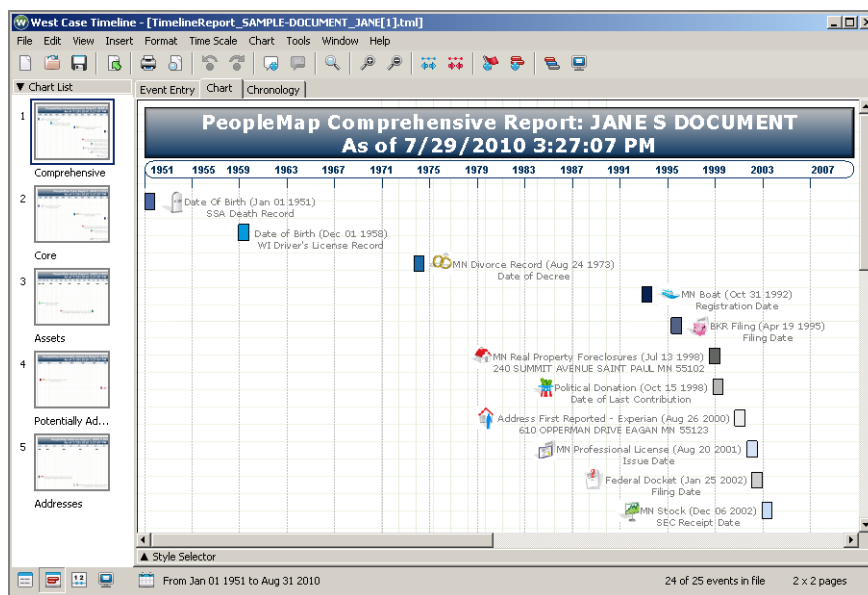


Figure 6-8. Westlaw PeopleMap report in West Case Timeline

To view the Westlaw PeopleMap report on Westlaw, click **Report Manager** at the top of any Westlaw page. The Report Manager page is displayed. Select the report you want to view and click **Go**.

Your Westlaw PeopleMap and West Case Timeline reports are available in the Report Manager for 14 days and can be accessed during this time at no additional charge.

7 Customizing Charts

You can customize every element in a chart in the following ways:

- Choose the element you want to customize from the Format menu to display its Format dialog box.
- Double-click an element in the chart to display its Format dialog box.
- Right-click an element in the chart and choose **Format [Element]** from the menu. The Format dialog box for that element is displayed.
- Use Themes and the Style Selector. For further information, see “Working with Themes and Styles” on page 33.

To view a full list of customization options, see Appendix A.

Selecting Events

In order to customize events, you must first select them. There are several ways to select an event or a group of events on a chart:

- To select one event, click it.
- To select a group of events, hold down the **Ctrl** key while selecting each event. In the alternative, drag the pointer to draw a box around the events you want to select.
- To select all events on the chart, choose **Select All** from the Edit menu.
- To select all events in a specific category, choose **Select by Category** from the Edit menu, then choose the category from submenu.
- To select events using specified search criteria, choose **Search/Select** from the Edit menu to display the Search dialog box. For more information on the Search/Select feature, see “Using Search/Select” on page 12.

Adding Events

To add an event while viewing the Chart tab, choose **Event** from the Insert menu to display the Event Entry tab. Enter the event information, then click the **Chart** tab to view the added event.

Excluding Events

By default, all events are included in your chart. You can exclude events in the following ways:

- On the Chart tab, right-click the events you want to exclude and choose **Hide** from the menu.
- On the Event Entry tab, clear the check boxes next to the events you want to exclude.

To include an event that you have excluded, select the check box next to the event on the Event Entry tab.

Note When you create a new chart after you have hidden events, a West Case Timeline dialog box is displayed giving you the option of creating the chart with all events or just the events in the current chart. Select the option you want and click **OK**. If you want this option to be your default, select the **Set as default** check box before clicking **OK**. To change the default, choose **Options** from the Tools menu to display the Options dialog box. Click the **Chart** tab, then choose an option from the *Create Chart with* drop-down list and click **OK**.

Adding Pictures to a Chart

You can easily add clip art or images to your chart. Once you add a picture, you can drag it anywhere on the chart. To shrink or enlarge the picture, select it and drag a handle until the picture is the size you want.

ADDING CLIP ART

To add clip art to the chart, choose **Picture, Clip Art** from the Insert menu.

- If Microsoft Office or Microsoft Works is installed on your computer, the Favorites–Microsoft Clip Organizer dialog box is displayed. To insert a picture, drag it from the Organizer onto the chart.
- If Microsoft Office or Microsoft Works is not installed on your computer, the West Case Timeline built-in clip art library is displayed. Select the desired picture and click **Open**.

ADDING IMAGES

You can add the following types of image files to your chart:

- BMP (Bitmap)
- GIF (Graphic Interchange Format)
- JPEG (Joint Photographic Experts Group)
- PNG (Portable Network Graphics)

To add an image to a chart, choose **Picture, From File** from the Insert menu to display the Insert Picture dialog box. Select the picture you want to insert and click **Open**.

FORMATTING PICTURES

You can format a picture in several ways including adding an outline or shadow, changing its shape, or making it a watermark. To format a picture, select the picture in the chart and choose **Picture** from the Format menu to display the Format Picture dialog box. Make the desired changes and click **OK**.

Adding Images to an Event

You can add an image to an event in a flag chart or bar chart. For example, to add an image to an event in a flag chart, complete these steps:

1. Right-click the event in the flag chart to which you want to add an image and choose **Format Event** from the menu. The Format Event dialog box is displayed.
2. Click the **Image** tab.
3. Select the **Show Image** check box to display the image in the event.
4. Click **Browse**. The Insert Picture dialog box is displayed.
5. Select the image you want to add and click **Open**. The Format Event dialog box is redisplayed.
6. Choose a size for the image from the *Size* drop-down list.
7. By default, the *Align Left* button is selected. Select the **Align Right** button, if desired.
8. To display a border around the image, click the color button to display the Colors dialog box. Select a color and click **OK**. Then choose a line style and a line width.
9. Click **OK**. The image is displayed next to the event name (Figure 7-1).

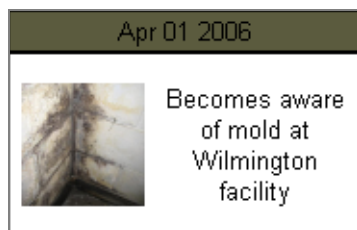


Figure 7-1. Added image in an event

To change the image for an event, repeat steps 1–9 above. To remove an image, clear the **Show Image** check box in the Format Event dialog box.

Adding Annotations

You can insert additional notes on your chart in an annotation. By default, the box surrounding the annotation is transparent so that the text appears to be part of the chart background. If desired, you can customize the annotation by adding a shape, outline, fill, and shadow. You can also position the annotation anywhere on the chart.

INSERTING AN ANNOTATION

To add an annotation, choose **Annotation** from the Insert menu to display the Annotation dialog box. Type your annotation in the text box, then make any other desired changes and click **OK**.

RESIZING AN ANNOTATION

To resize the annotation, select it and drag a handle until the annotation is the size you want.

MOVING AN ANNOTATION

To move the annotation, drag it to the desired position on the chart.

Changing the Title and Title Bar

The first time you create a chart, the chart is named *Untitled* in the title bar. You can change the title, its font style, and the alignment of the text. You can also change the shape, outline, fill, and shadow of the title bar. To change the title and the title bar, double-click the title bar to display the Format Title dialog box. Make the desired changes and click **OK**.

Note To insert the current day's date in the title, type **@today** in the text box next to the title.

Changing the Footer and Footer Bar

By default, the text *Produced on [today's date]* is displayed in the footer of the chart. You can modify the footer by

- changing the text of the footer, modifying its font style, or deleting the text
- adding an image to the footer
- resizing the footer bar and moving it to any position along the bottom of the chart

CUSTOMIZING THE TEXT IN THE FOOTER

To customize the text in the footer, choose **Footer** from the Format menu to display the Format Footer dialog box. Make the desired changes and click **OK**.

ADDING AN IMAGE TO THE FOOTER

To add an image to the footer, complete these steps:

1. Choose **Footer** from the Format menu to display the Format Footer dialog box.
2. Click **Browse**. The Insert Picture dialog box is displayed.
3. Select the image you want to add and click **Open**. The Format Footer dialog box is redisplayed.
4. Select the **Image** check box to display the image in the footer.
5. Select the **Watermark** check box, if desired.
6. Choose a position from the *Image Position* drop-down list.
7. Click **OK**.

To remove an image from the footer, clear the **Image** check box in the Format Footer dialog box.

CUSTOMIZING THE FOOTER BAR

You can customize the footer bar in the following ways:

- To resize the footer bar, select it and drag a handle until it is the size you want.
- To move the footer bar, drag it to the desired position along the bottom of the chart.
 - Note** The footer is automatically placed at the bottom of the chart, beneath all other chart elements, and cannot be moved above the other chart elements.
- To delete the footer bar, choose **Footer** from the Format menu to display the Format Footer dialog box. Clear the **Text** check box and click **OK**.

Changing the Background

The chart background can have a one-color, two-color (gradient), or graphic fill. To customize the chart background, choose **Background** from the Format menu to display the Format Background dialog box. If you choose **Graphic Fill** from the *Fill Type* drop-down list, you can select one of the default tiles included in the dialog box or an image from your own collection. Make the desired changes and click **OK**.

For example, to add a logo as a watermark to your chart, complete these steps:

1. Choose **Background** from the Format menu to display the Format Background dialog box (Figure 7-2).
2. Choose **Graphic Fill** from the *Fill Type* drop-down list.
3. Click **Browse** to display the Insert Picture dialog box.
4. Select the logo file and click **Open**. The logo is added to the tiles in the Format Background dialog box.
5. Choose **Center** from the *Position* drop-down list.

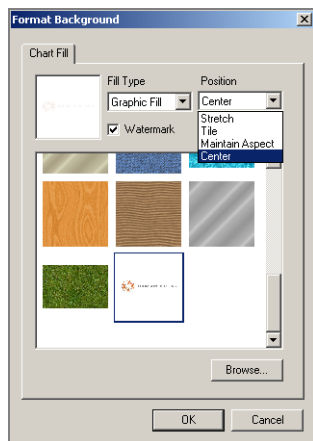


Figure 7-2. Format Background dialog box

6. Select the **Watermark** check box.
7. Click **OK**. The logo is displayed in the chart as a watermark.

Note For best results when using one of the default tiles for the graphic fill, choose **Tile** from the *Position* drop-down list.

Changing the Legend



The legend is used to explain the relationship between a category and the event color in the chart. You can resize the legend and move it to any position on the chart or delete it. You can customize the legend in the following ways:

- To hide or display the legend, choose **Legend** from the Format menu to display the Format Legend dialog box. Clear the **Show Legend** check box to hide the legend or select the check box to display the legend and click **OK**.
- To resize the legend, select it and drag a handle until the legend is the size you want.
- To move the legend, drag it to the desired position on the chart. If desired, you can position the legend on the left or right side of the chart.
- To customize the legend, choose **Legend** from the Format menu to display the Format Legend dialog box. Make the desired changes and click **OK**.

Changing the Timescale

The timescale is the tick line that runs across the chart. The labels on the timescale display as much information as space permits, with the labels for the smallest increments inside the bar and the labels for the largest increments outside the tick line.

EXPANDING AND COMPRESSING THE TIMESCALE

You can increase or decrease the timescale on your chart by using the Expand/Compress feature. The smaller the time increments you choose, the more horizontal space your chart will require. To expand or compress the timescale, click the **Expand Time Scale** button  or **Compress Time Scale** button  on the Standard toolbar. Repeat as necessary.

Notes

- Each time you expand or compress the timescale, your chart becomes a quarter page wider or narrower. To limit the change to an eighth of a page, hold down the **Shift** key as you expand or compress the timescale.
- A blue dashed line depicts a page break so you can see how large your chart is. By default, the page orientation is in landscape mode. To modify the page orientation, choose **Page Setup** from the File menu to display the Page Setup dialog box, then select **Portrait** and click **OK**.

MANUALLY SETTING A START AND END DATE

To manually set a start and end date, choose **Date Range** from the Time Scale menu to display the Time Scale dialog box. Select **Manual** on the Date Range tab, then make the desired changes and click **OK**. Events that do not occur within the defined date range do not appear on the chart and their check boxes are shaded on the Event Entry tab.

Note When a manual date range is used, a padlock icon  is displayed next to the date on the status bar at the bottom of the window.

CHANGING THE TIME INCREMENTS

To change the time increments on the timescale, choose **Date Range** from the Time Scale menu to display the Time Scale dialog box, then click the **Time Increments** tab (Figure 7-3). Select **Manual**, then choose a time increment from the drop-down list and click **OK**.

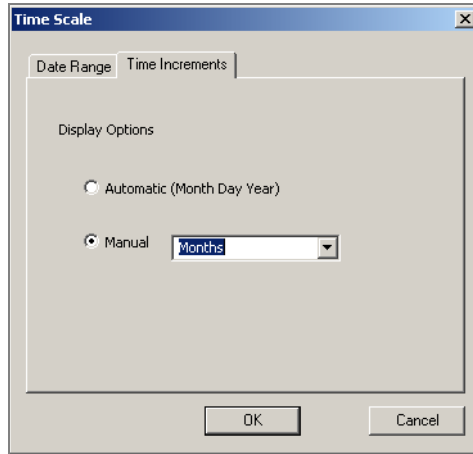


Figure 7-3. Time Scale dialog box–Time Increments tab

To change the default time increment, choose **Options** from the Tools menu to display the Options dialog box. On the General tab, choose a time increment from the *Time Increment Display* drop-down list and click **OK**.

INSERTING A BREAK IN THE TIMESCALE

You can insert a break in the timescale when there are large gaps of time between events or when an event spans a long period of time with no other events occurring during the same time span. When you point to the timescale, time spans for logical breaks are displayed. To insert a break, right-click the timescale where you want to insert the break and choose **Insert Break** from the menu (Figure 7-4). To remove the break, right-click the break and choose **Delete Break** from the menu.

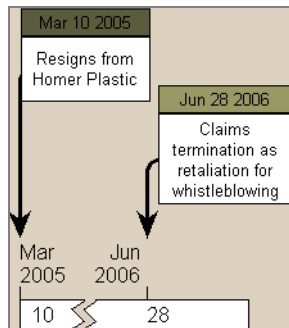


Figure 7-4. Timescale showing a break

MODIFYING THE APPEARANCE OF THE TIMESCALE

To modify the appearance of the timescale, choose **Time Scale** from the Format menu to display the Format Time Scale dialog box. Make the desired changes and click **OK**.

Changing the Date Display

To change the format of the dates displayed in the charts, choose **Options** from the Tools menu to display the Options dialog box (Figure 7-5). On the General tab, choose a format from the *Date Display Format* drop-down list and click **OK**.

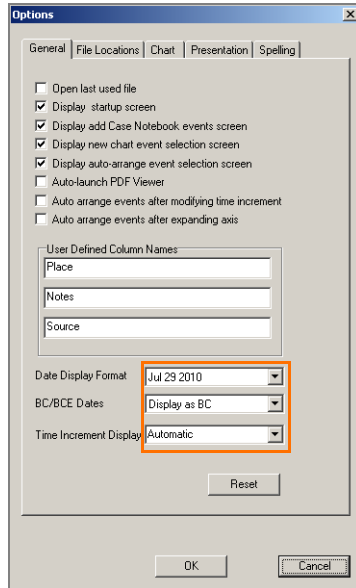


Figure 7-5. Options dialog box—General tab

Showing and Hiding the Border

You can choose to display a thick black rectangular border around your chart. Choose **Border** from the Format menu. A check mark indicates the border is displayed around the chart.

Showing and Hiding the Grid Lines (Bar Chart Only)

Grid lines on the bar chart help you to judge event dates. To show or hide grid lines, choose **Gridlines** from the Format menu. A check mark indicates grid lines are displayed in the chart.

Changing the Connectors (Flag Chart Only)

The connectors on the flag chart are the arrows that connect the events to their assigned dates on the timescale. You can modify the shape, color, style, and thickness of the connectors. To modify the connectors, choose **Connectors** from the Format menu to display the Format Connectors dialog box. Make the desired changes and click **OK**.

Note All connectors on the flag chart are modified when a change is applied. You cannot modify individual connectors.

Resizing Flags (Flag Chart Only)

To resize a flag, select it and drag a handle until the flag is the size you want. To resize multiple flags, drag the pointer to draw a box around the flags you want to resize, then drag a handle until the flags are the size you want.

8 Working with the Chart List

Every time you create a new bar chart or flag chart it is saved in the Chart List (Figure 8-1). You can assign titles to your charts and duplicate or delete charts. You also can use the Chart List for your presentations, including determining which charts to include, the chart sequence, and transition options. For more information on presentations, see “Presenting Your Timeline” on page 37.

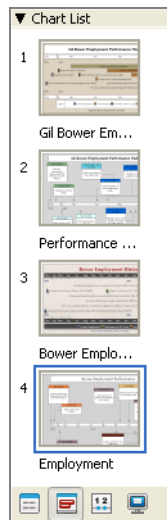


Figure 8-1. Chart List

Assigning a Chart Title

By default, all charts in the Chart List are named *Untitled*. To assign a different title, right-click the chart and choose **Rename** from the menu, then type the new title in the text box.

Deleting a Chart

To delete a chart from the Chart List, right-click the chart and choose **Delete** from the menu.

Duplicating a Chart

To duplicate a chart in the Chart List, right-click the chart and choose **Duplicate** from the menu. A copy of the chart is displayed in the Chart List.

Rearranging the Chart Sequence

You can rearrange the charts in the Chart List in any sequence. Rearranging the charts affects the order in which they are displayed in a presentation. To change the order of a chart, drag it to the desired position.

9 Working with Themes and Styles

Using Themes

West Case Timeline includes several professionally designed themes, which you can use to transform your chart into a unique presentation. You can also import themes created by others or create and save your own customized themes.

Note By default, all new charts are created using the Tranquil theme. To change the default theme, choose **Options** from the Tools menu to display the Options dialog box. Click the **Chart** tab, then choose a different theme from the *Default Theme* drop-down list and click **OK**.

APPLYING A THEME

To apply a theme to a chart, select a theme in the Theme List in the lower-left corner of the window and click **Apply** (Figure 9-1). All of the elements in the chart are modified with the default styles of the theme.

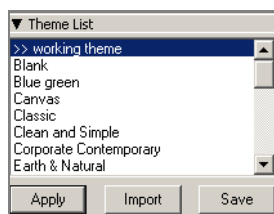


Figure 9-1. Theme List

IMPORTING A THEME

To import a theme, click **Import** under the Theme List to display the Import Theme dialog box. Select the theme file (.thm) you want to import and click **Open**. The theme is listed in the Theme List.

SAVING A CUSTOMIZED THEME

To save a customized theme, complete these steps:

1. Select **>>working theme** in the Theme List.
2. Make the desired changes directly in the chart or use the Style Selector to modify the styles. For information on using the Style Selector, see "Using the Style Selector" on page 34.
3. Click **Save** under the Theme List. The Save Theme As dialog box is displayed.
4. Type a name for your theme in the text box.
5. Click **OK**. The theme is listed in the Theme List.

DELETING A CUSTOMIZED THEME

To delete a customized theme, select it in the Theme List, then click **Delete**. The message *Are you sure you want to delete [theme name]?* is displayed. Click **Yes**.

Note You cannot delete the predefined themes included with West Case Timeline.

Using the Style Selector

The Style Selector at the bottom of the window displays a sample of every style in the selected theme (Figure 9-2).

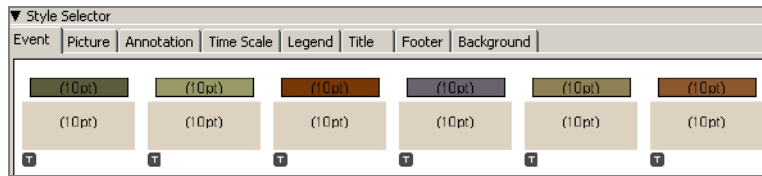


Figure 9-2. Style Selector

Note A *T* under a style indicates it belongs to a saved theme.

APPLYING A STYLE

You can apply a style in the following ways:

- Select a theme in the Theme List, then click the tab in the Style Selector that corresponds to the chart element and drag the style over the element in the chart.
- Select an element in the chart, then right-click the style in the Style Selector and choose **Apply to Selected** from the menu.

MODIFYING A STYLE

To modify a style, complete these steps:

1. Select **>>working theme** in the Theme List.
2. In the Style Selector, click the tab for the element whose style you want to change.
3. Right-click the style and choose **Edit Style** from the menu. The Edit [Element] Style dialog box is displayed.
4. Make the desired changes and click **OK**.

Note You can modify styles only in the working theme. Styles in saved themes are locked and cannot be modified.

DELETING A STYLE

To delete a style, complete these steps:

1. Select **>>working theme** in the Theme List.
2. In the Style Selector, click the tab for the element whose style you want to delete.
3. Right-click the style and choose **Delete Style** from the menu. The style is deleted and any chart elements using this style revert to the default style.

Note You can delete styles only in the working theme. Styles in saved themes are locked and cannot be removed.

CHANGING THE DEFAULT STYLE

You can change the default style only for pictures and annotations. To change the default style, complete these steps:

1. Select **>>working theme** in the Theme List.
2. In the Style Selector, click the **Picture** or **Annotation** tab.
3. Right-click the style you want to save as the default style and choose **Make Default Style** from the menu.

Customizing Colors

You can easily modify theme colors or apply custom colors using the Colors dialog box. For example, to modify the head fill color for an event in a flag chart, complete the following steps:

1. Right-click the color you want to modify on the Event tab in the Style Selector and choose **Edit Style** from the menu. The Edit Event Style dialog box is displayed.
2. Click the **Head Fill** tab (Figure 9-3).

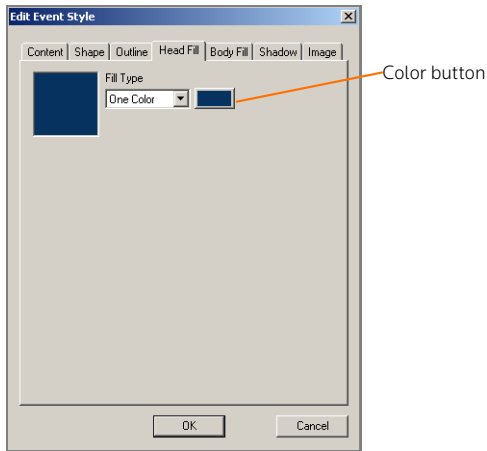


Figure 9-3. Edit Event Style dialog box—Head Fill tab

3. Click the color button to display the Colors dialog box (Figure 9-4).



Figure 9-4. Colors dialog box

4. Click **Add Custom Colors** to display the color palette (Figure 9-5).

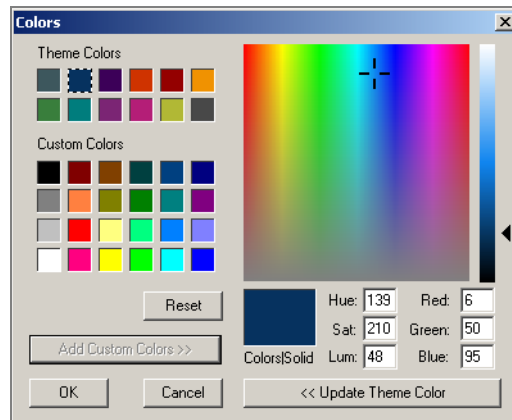


Figure 9-5. Colors dialog box with color palette

5. Make your desired changes and click **OK**. The Edit Event Style dialog box is redisplayed.
6. Click **OK**.

10 Presenting Your Timeline

With West Case Timeline, you can create your own presentation slides for your charts. You do not need other software to create or view a presentation. You can also import your charts and presentations into Microsoft PowerPoint. For more information, see "Inserting Timeline Charts into Microsoft PowerPoint" on page 38.

Creating a Presentation

Each time you create a new bar or flag chart, it is displayed in the Chart List. West Case Timeline uses these charts to create your presentation.

CUSTOMIZING THE CHART SEQUENCE

The order of the charts in the Chart List is the sequence in which they are displayed in the presentation.

- To rearrange the charts, drag them to their desired positions in the Chart List.
- To remove a chart from the presentation, right-click the chart. Choose **Show in Presentation** from the menu to clear the check mark. The chart is only excluded from the presentation; it is not deleted from the Chart List. To reinsert the chart into the presentation, right-click the chart and choose **Show in Presentation** from the menu.
- To duplicate a chart in the presentation, right-click the chart and choose **Duplicate** from the menu.

A sequence number displayed next to a chart in the Chart List indicates that it is included in the presentation and the order in which it is displayed in the presentation (Figure 10-1).

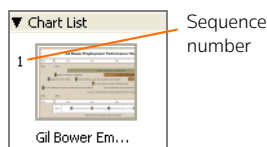


Figure 10-1. Chart List


CUSTOMIZING PRESENTATION OPTIONS

To customize the presentation options, right-click a chart in the Chart List and choose **Presentation Options** from the menu. Then choose one of the following options from the submenu:

- **Fit Height:** Scales the chart so that the chart height fills the slide.
- **Step Through Events:** Displays an empty chart so that you can display the events one at a time.
- **Order (by Time or by Category):** Enables you to choose between presenting the events in the order they occurred or by category.
- **Justify (Right or Center):** Used for positioning of chart when the active event would otherwise be off the slide. Choose **Center** to position that chart so that the active event is in the center of the slide. Choose **Right** to position the chart so that active event is on the right side of the slide.
- **Highlight (None, Glow, or Fade):** Choose **Fade** to lighten events not in focus so that the active event is prominent. Choose **Glow** to highlight the active event with a yellow outline. Choose **None** to display the event without any added effects.

Note Only the selected chart's presentation options are modified.





Viewing a Presentation

To view the presentation, choose **Presentation** from the Chart menu or click the **View Presentation** button  on the Standard toolbar. The presentation is displayed in a slide show. To move through the presentation, use the arrow keys on your keyboard. To return to West Case Timeline, press **Esc** on the keyboard.

In the alternative, you can use the toolbar at the bottom center of the slide (Figure 10-2).



Figure 10-2. Presentation toolbar

- Click the down arrow  to display the following options:
 - End Presentation
 - Restart Presentation
 - Auto Hide Toolbar
 - Hide Scrollbars
 - Go to Chart (list of charts included in presentation)
- Click the zoom buttons  to make your chart appear larger or smaller.
- In Step Through Events mode, click the right arrow  to add the next event to the chart. Click the left arrow  to return to the previous event. Otherwise, you can use these arrows to scroll through large charts or move between charts.

Inserting Timeline Charts into Microsoft PowerPoint

You can easily insert your timeline charts into a Microsoft PowerPoint 2003 or Microsoft PowerPoint 2007 presentation. A PowerPoint slide is created for each chart and inserted after the slide that is currently selected in the PowerPoint slide list.

Notes

- When you update a chart in West Case Timeline, it is also automatically updated in PowerPoint.
- As with the West Case Timeline presentation mode, you can set presentation options for viewing the timeline in PowerPoint. For information on setting the presentation options, see “Customizing Presentation Options” on page 37.
- For the presentation options to work with PowerPoint, West Case Timeline or the West Case Timeline Viewer, the timeline file, and any linked files with the compatible viewer must be installed on the computer with the presentation. If these items are not installed, the chart slides are displayed as static images. You can download the West Case Timeline Viewer for free at west.thomson.com/software/timeline/welcome.aspx.
- If you are transferring your files to another computer for the PowerPoint presentation, place all the files (West Case Timeline, PowerPoint, images, and linked files) together in the same location (e.g., the My Timelines folder within the My Documents folder) so West Case Timeline can find them.

USING MICROSOFT POWERPOINT 2003

When you install West Case Timeline, a West Case Timeline menu is automatically displayed in Microsoft PowerPoint 2003 (Figure 10-3).

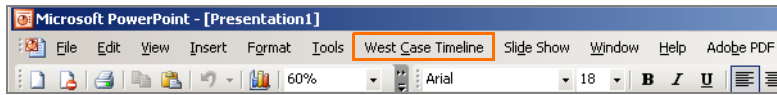


Figure 10-3. Microsoft PowerPoint menu bar showing West Case Timeline

To insert a timeline chart into PowerPoint 2003, complete these steps:

1. Access PowerPoint.
2. Choose **Insert West Case Timeline Chart** from the West Case Timeline menu. The Insert Timeline File dialog box is displayed.
3. Select the file you want to insert and click **Open**. The Insert Timeline Chart dialog box is displayed.
4. Select the appropriate options and click **Insert**. The chart is displayed in a PowerPoint presentation.

USING MICROSOFT POWERPOINT 2007

If you are using PowerPoint 2007, the options for West Case Timeline are displayed on the Add-Ins tab (Figure 10-4).

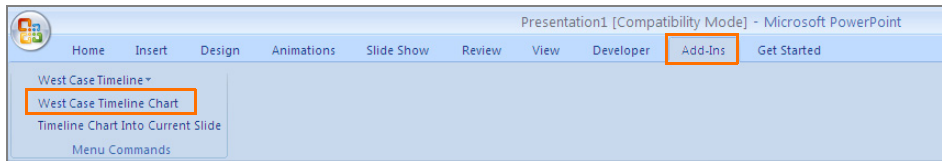


Figure 10-4. Add-Ins tab on the Microsoft PowerPoint 2007 menu bar


To insert a chart into PowerPoint 2007, complete these steps:

1. Access PowerPoint.
2. Click the **Add-Ins** tab.
3. Click **West Case Timeline Chart**. The Insert Timeline File dialog box is displayed.
4. Select the file you want to insert and click **Open**. The Insert Timeline Chart dialog box is displayed.
5. Select the appropriate options and click **Insert**. The chart is displayed in a PowerPoint presentation.

11 Printing Timelines

You can easily send your timelines directly to a printer or use the Print Preview feature to customize your charts before printing.

To send a timeline directly to a printer, complete these steps:

1. Click the **Chart** tab and then click the chart you want to print in the Chart List. If you want to print the chronology, click the **Chronology** tab.
2. Click the **Print** button  on the Standard toolbar. The Print dialog box is displayed.
3. Make the desired selections and click **OK**.


Note To print an enlarged timeline on an off-site large format printer, it is recommended that you use the Send To PDF Viewer feature, then increase the size of the timeline in the PDF viewer before you print. For further information, see “Viewing a Chart in PDF” on page 41.

Using Print Preview

You can use Print Preview to fit the timeline on one page, center the timeline on the page, switch from portrait to landscape orientation, select a new page size, and scale your chart up or down to print on as many pages as you like (up to 20-by-20 feet). Multipage charts include crop and alignment marks for easy assembly.

Note Print Preview is not available for the chronology.

To customize your chart in Print Preview, complete these steps:

1. Click the **Chart** tab and then click the chart you want to print in the Chart List.
2. Click the **Print Preview** button  on the Standard toolbar. Your document is displayed in Print Preview.
3. Make the desired changes and click **Print**. Though the timeline may appear distorted in Print Preview, it prints correctly.

Note You can enlarge or reduce the chart size by dragging the sizing handle in the lower-right corner of your chart until the chart is the size you want.

12 Sharing Timelines

Packaging for Sharing

The Package for Sharing feature allows you to share your timeline files with another computer or person. It packages the timeline file with all its attachments, such as images and linked documents, and places them in a compressed, or zipped (.tlmz), file.

PACKAGING A TIMELINE FILE

To package the timeline file, complete these steps:

1. Choose **Package for Sharing** from the File menu. The Package File for Sharing dialog box is displayed.
2. Type a file name in the *File name* text box. You can use your original timeline file name, if desired.
3. Click **Save**. A message confirming that the packaging was successful is displayed. Click **OK**.

OPENING A PACKAGED FILE

To open a packaged file, complete these steps:

1. Choose **Open** from the File menu. The Open dialog box is displayed.
2. Select the **.tlmz** file and click **Open**. The Choose Destination Folder dialog box is displayed.
3. Select a destination folder and click **OK**. The file is opened in West Case Timeline.

Sending Timelines

You can use the Send To feature to e-mail your charts or view them in PDF.

E-MAILING A CHART

To e-mail a bar chart or flag chart, complete these steps:

1. Click the **Chart** tab and then click the chart you want to e-mail in the Chart List.
2. Choose **Send To, Mail Recipient** from the File menu. Your default e-mail program opens with a JPEG image of your chart attached to a new message.

Note If this feature does not function properly, complete these steps:

1. Access Microsoft Outlook 2003 or Microsoft Outlook 2007.
2. Choose **Options** from the Tools menu to display the Options dialog box.
3. Click the **Other** tab.
4. Select the **Make Outlook the default program for Email, Contacts, and Calendar** check box.
5. Click **OK**.

VIEWING A CHART IN PDF

To display a bar chart or flag chart in PDF:

1. Click the **Chart** tab and then click the chart you want to view in the Chart List.
2. Choose **Send To, PDF Viewer** from the File menu. Your chart is opened in your PDF viewer.

Note The Send to PDF Viewer feature creates a temporary PDF file on your computer that is deleted when the viewer is closed. To save a copy of this file in Adobe Reader, choose **Save As** from the File menu. In the alternative, you can publish your chart in PDF within West Case Timeline. For information on publishing your chart in West Case Timeline, see below.


Publishing Timelines

You can publish your timelines in the following formats:

- HTML document
- PDF document
- graphic document (JPG, GIF, TIF, BMP, PNG)

Note You can publish the chronology only as an HTML Document.

To publish a timeline, complete these steps:

1. Click the **Chart** tab and then click the chart you want to publish in the Chart List. If you want to publish the chronology, click the **Chronology** tab.
2. Click the **Publish Chart** icon  on the Standard toolbar. The Publish As dialog box is displayed.
3. Type a name for the file in the *File name* text box.
4. Choose a file type from the *Save as type* drop-down list.
5. Click **Save**.

Note Publishing to HTML creates two files: HTML and JPG. If you want to move the HTML file to a separate directory, you must move the corresponding JPG file with it to view the image.

Copying a Chart to the Clipboard

You can copy an entire chart or part of a chart and paste it into other applications using the Copy Chart to Clipboard feature. To copy a chart to the clipboard, complete these steps:

1. Click the **Chart** tab and then click the chart you want to copy in the Chart List.
2. Choose **Copy Chart to Clipboard** from the Edit menu, then choose **Entire Chart** or **Chart Shown** from the submenu.
3. Open another application, e.g., Microsoft Word, and paste the chart you have copied.

Appendix A: Chart Customization Options

Depending on the chart component you choose, the following options are available in the Format dialog boxes:

- Content**
 - includes text, font style, and alignment
 - applies to Event, Annotation, Title, Footer, Legend, and Timescale elements
- Shape**
 - includes up to eight different shapes, depending on selected chart element; a three-dimensional (3D) option is available for the square/rectangle shape
 - applies to Event, Picture, Annotation, Title, Footer, Legend, and Timescale elements
- Outline**
 - includes styles for line shape, color, and thickness
 - applies to Event, Picture, Annotation, Title, Footer, Legend, and Timescale elements
- Fill**
 - includes fill styles with one solid color, a gradient with two colors, or a graphic (including a watermark option) or a transparent fill style (same color as the page it is on), depending on selected chart element
 - applies to Event, Picture, Annotation, Title, Footer, Background, Legend, and Timescale elements
- Shadow**
 - includes nine shadow effects
 - applies to Event, Picture, Annotation, Title, Footer, Legend, and Timescale elements

Appendix B: Entering Dates

- Your event dates can be displayed either in day, month, year or month, day, year format. To modify how the date is displayed, choose **Options** from the Tools menu. The Options dialog box is displayed. Make the desired changes on the General tab, then click **OK**.
- You can enter your dates in a variety of ways. Regardless of the display format specified, any variation that can be interpreted with certainty is valid. For example, you could enter the date of January 2, 1932, in the following ways:

2 Jan 1932	2 January 1932	02 01 1932*	1932 01 02
2 Jan 32	2 January 32	02 01 32*	32 01 02
Jan 2 1932	January 2 1932	01 02 1932**	1932 Jan 02
Jan 2 32	January 2 32	01 02 32**	32 Jan 02

*You can enter January 2, 1932, in this way if you selected the day, month, year display format.

**You can enter January 2, 1932, in this way if you selected the month, day, year display format.

If the last two digits of the year are 31 or less, enter a four-digit year to avoid ambiguity.

You can also enter dates with the year in the second position if you do not use numbers for the month. For example: **Jan 1932 02** or **02 1932 Jan**.

- West Case Timeline requires a space between the day, month, and year. You can also use a date separator, as shown below:

Date Separator	Example
/	02/01/32
-	02-01-32
.	02.01.32
,	Jan 2, 1932

Note You can use any date separator specified in your Windows Regional Options. To access these options, choose **Control Panel** from the Start menu, then double-click **Regional and Language Options**.

- With West Case Timeline, you can have the current date always displayed on your charts and reports. To have the event updated with the current date, type **today** in the *Start Date* column.
- You can also use the calendar to enter dates. To access the calendar, double-click a date field and click the **Calendar** icon. The calendar is not available for dates prior to October 1752.

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