

Contents

Presentation Professional Swimlanes and Display Options	2
Overview.....	2
Swimlanes.....	3
What are Swimlanes?	3
Using the Swimlane Tools	4
Making Swimlanes on the chart.....	7
Composition of Swimlane Shapes.....	8
Hands-on Exercise – Creating Swimlanes.....	9
Nested Swimlanes	13
Hands-on Exercise – Creating Nested Swimlanes.....	17
Waterfall and Gantt Display Styles.....	24
Hands-on Exercise – Importing Shapes in a Gantt Style	26
Hands-on Exercise – Changing the Display Style on an Existing Chart	30

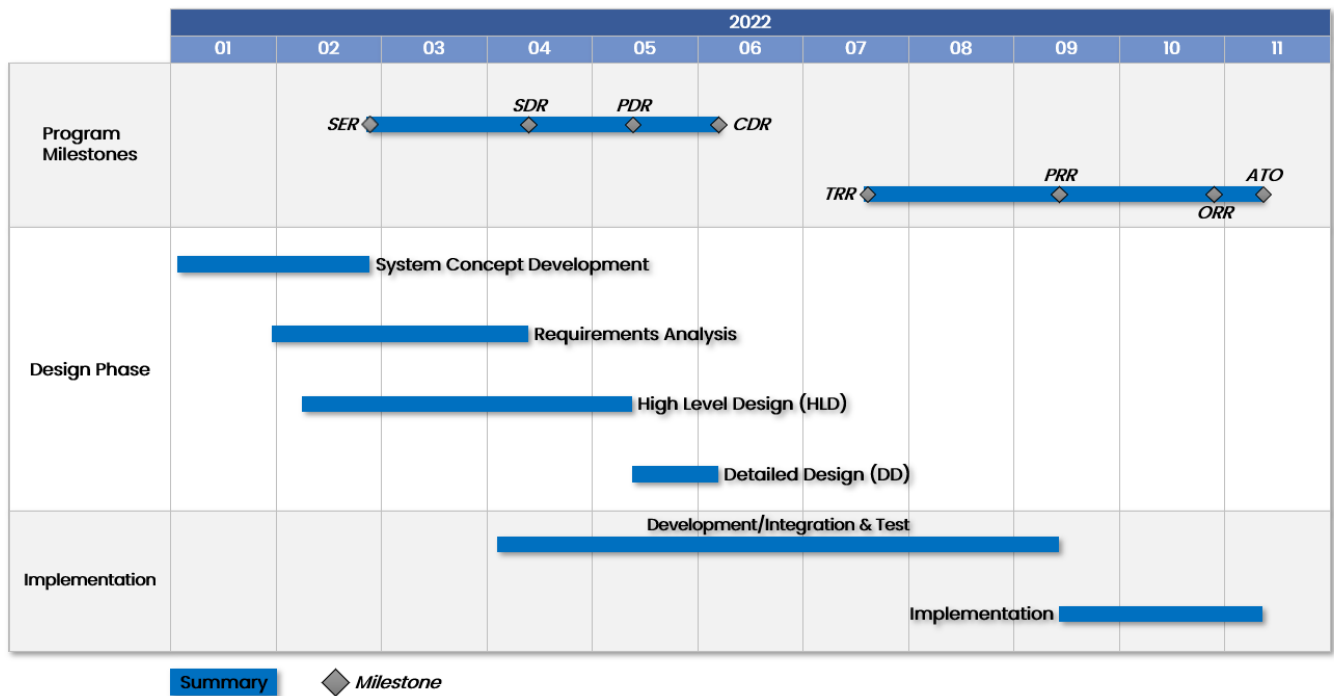
Presentation Professional Swimlanes and Display Options

Overview

SSI Presentation Professional is an add-in for **Microsoft PowerPoint** that is designed to create high level project schedule charts or roadmaps that can be presented to an audience. SSI Presentation Professional creates presentations by generating PowerPoint objects (shapes) that can be linked to Microsoft Project schedule items (Summaries, Tasks, and Milestones).

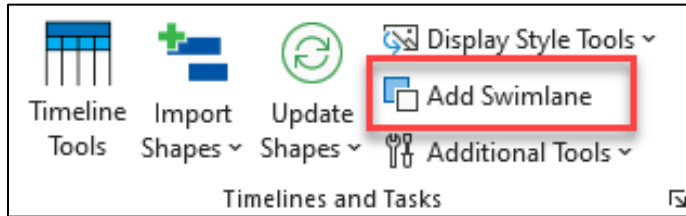
This document will cover features of Presentation Professional, including:

- How to create Swimlanes
- Using the Waterfall and Gantt display styles

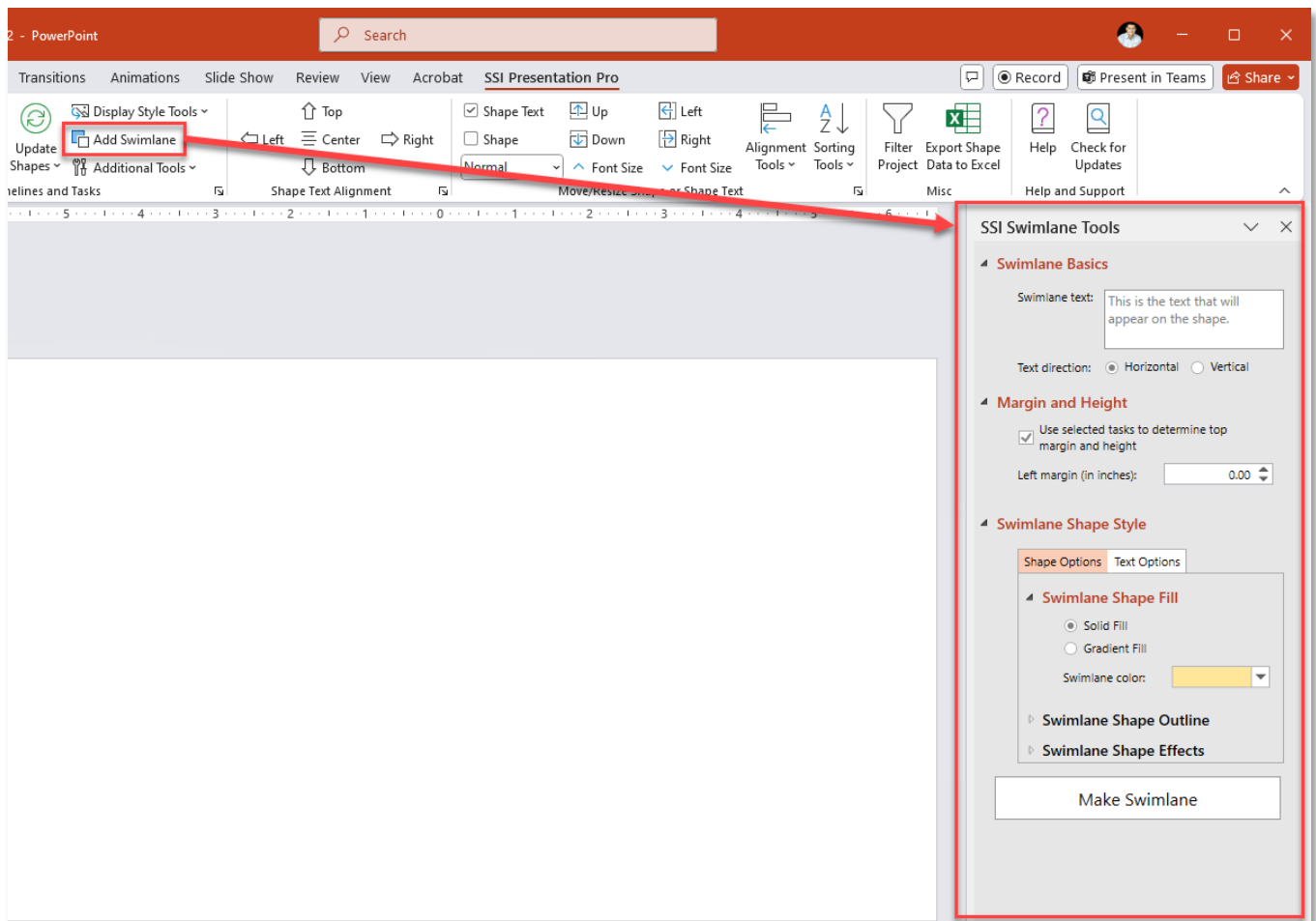


Using the Swimlane Tools

Swimlanes can be created in Presentation Pro by using the **Swimlane Tools**. To open the Swimlane Tools, click the **Add Swimlane** button in the **SSI Presentation Pro Ribbon**.



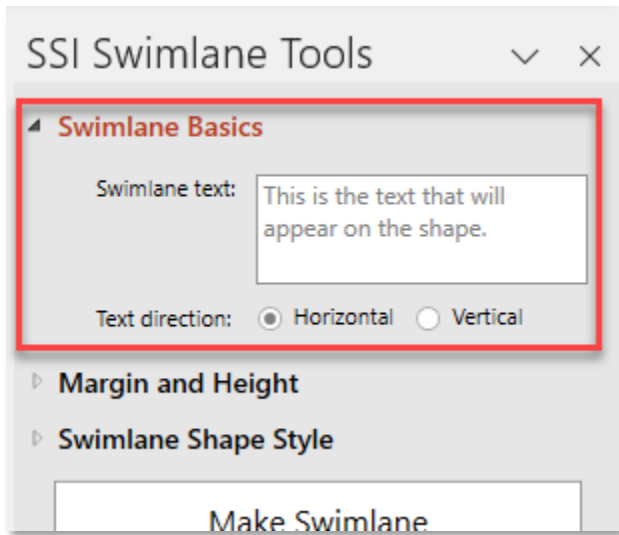
The **Swimlane Tools** open as a task pane docked to the right side of PowerPoint.



The **Swimlane Tools** are broken down into 3 sections:

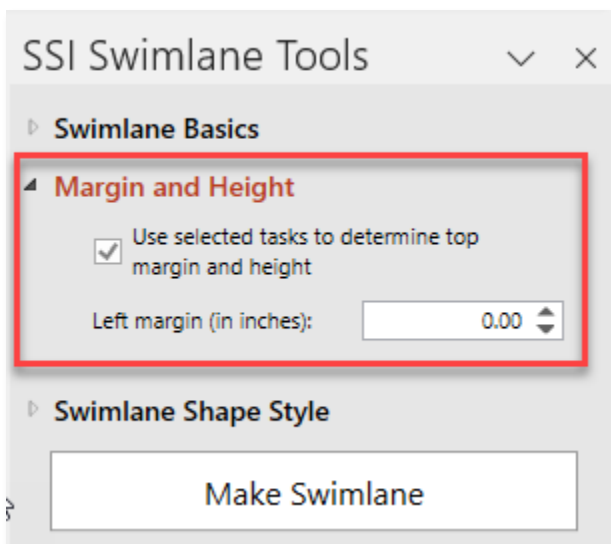
1. Swimlane Basics
2. Margin and Height
3. Swimlane Shape Style

The Swimlane Basics Section



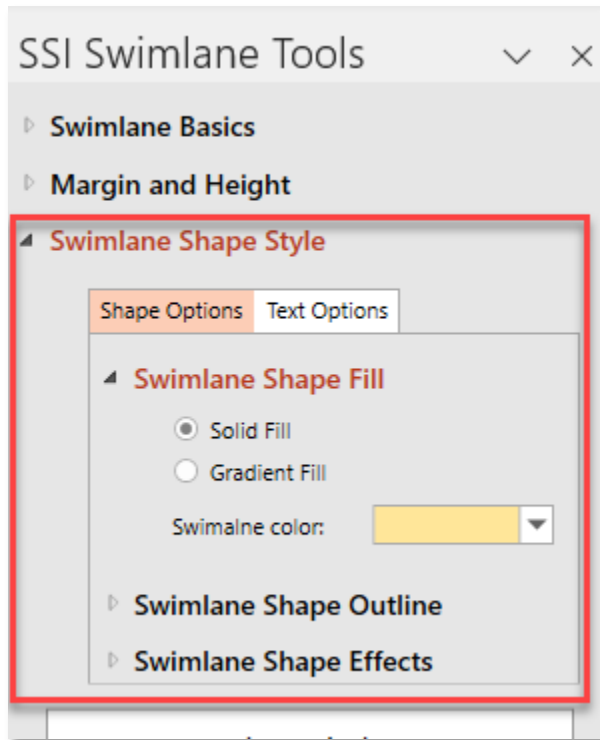
In the **Swimlane Basics** section of the Swimlane Tools, you can control the text or *title* of the Swimlane as well as the text direction. The text of a Swimlane will always appear in the left margin of a timeline on a chart.

The Margin and Height Section



Using the **Margin and Height** section of the Swimlane Tools, the top margin, SwimLane Height, and left margin can be controlled. SSI recommends keeping the ***Use selected tasks to determine top margin and height*** option turned on, as it will allow Presentation Pro to automatically calculate where to position the Swimlane based on task shapes that are currently selected on the chart.

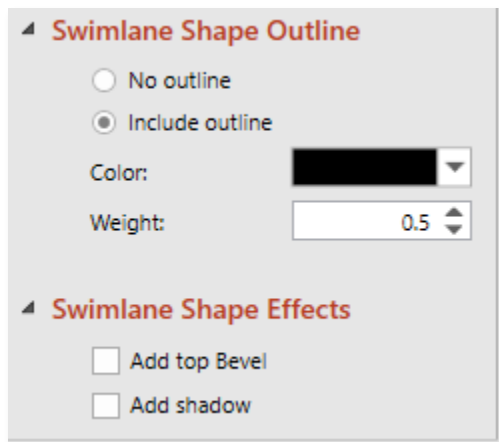
The Swimlane Shape Style Section



The ***Swimlane Shape Style*** section of the Swimlane Tools can be used to control the following:

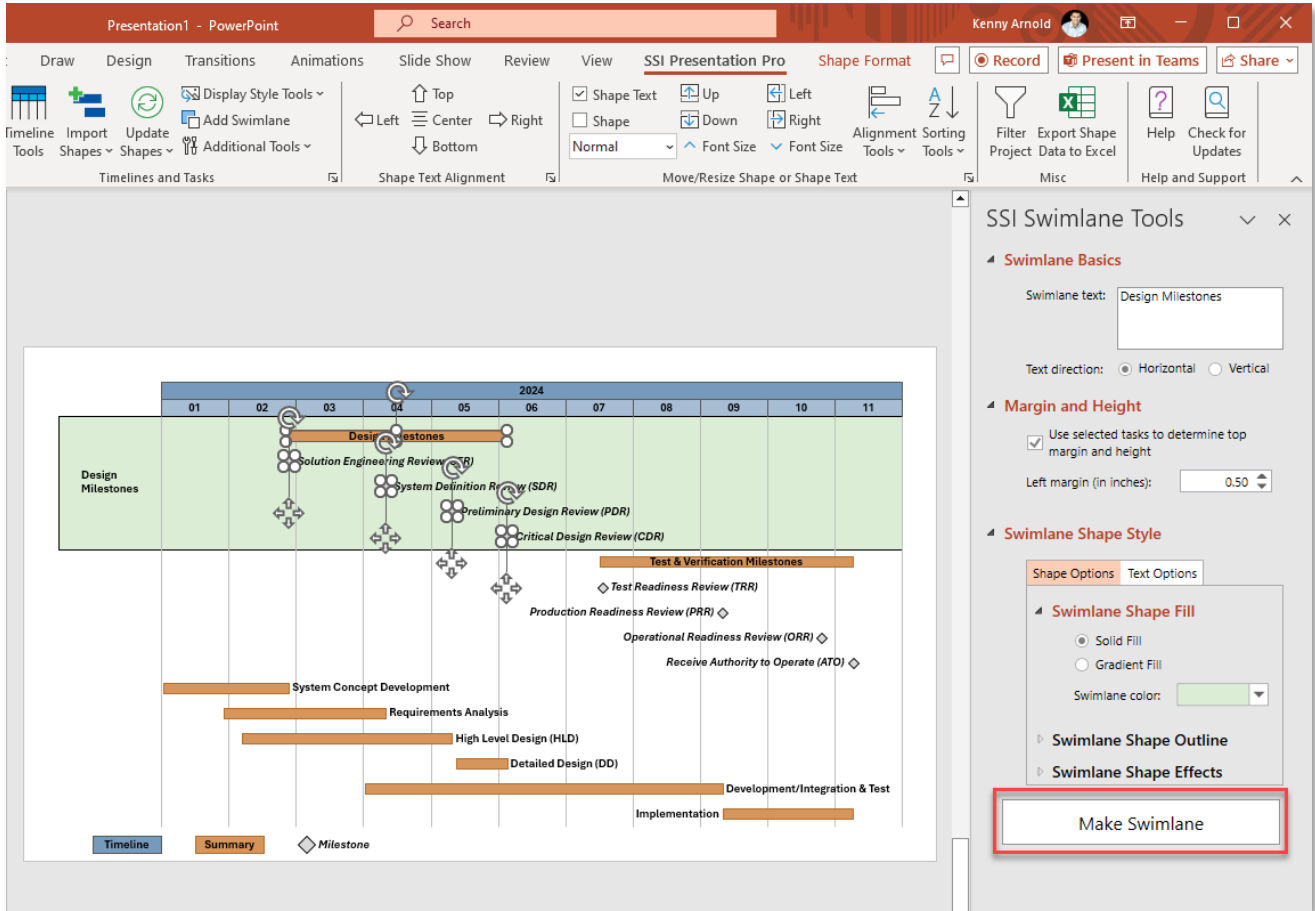
- Swimlane fill color and style
- Swimlane outline color and style
- Swimlane special effects
- Swimlane Text Style

Expand any of the subsections within the ***Swimlane Shape Style*** section to reveal additional controls for these categories.



Making Swimlanes on the chart

Once you are satisfied with the options selected in the *Swimlane Tools*, click the *Make Swimlane* button to create the Swimlane. If the *Use selected tasks to determine top margin and height* option in the *Margin and Height* section of the Swimlane Tools is checked, Presentation Pro will automatically create the Swimlane around the shapes you have currently selected.



The screenshot displays the SSI Presentation Pro software interface. The main window shows a Gantt chart with a timeline from 2024 (01 to 11). The chart includes various milestones and tasks such as Design Milestones, Solution Engineering Review (SER), System Definition Review (SDR), Preliminary Design Review (PDR), Critical Design Review (CDR), Test & Verification Milestones, Test Readiness Review (TRR), Production Readiness Review (PRR), Operational Readiness Review (ORR), Receive Authority to Operate (ATO), System Concept Development, Requirements Analysis, High Level Design (HLD), Detailed Design (DD), Development/Integration & Test, and Implementation. The Swimlane Tools panel is open on the right side, showing options for Swimlane Basics, Margin and Height, and Swimlane Shape Style. The 'Make Swimlane' button is highlighted with a red box.

Make sure there is enough margin on the left side of the chart for the text of the Swimlane to present well to your audience. You can adjust the left margin of your chart by using the *Timeline Tools*.

Note: Swimlanes are smart horizontally. Presentation Pro will automatically be able to reposition your swimlane if you make any changes to the left or right margins of the timeline. Swimlanes are *not* smart vertically. The swimlane does not know what shapes it surrounds. If you change the vertical spacing of shapes on your chart, the swimlane will not automatically be adjusted, and will instead stay at its current vertical position. You can adjust a swimlane's top margin and height manually by clicking on the swimlane shape and adjusting it like any other PowerPoint shape.

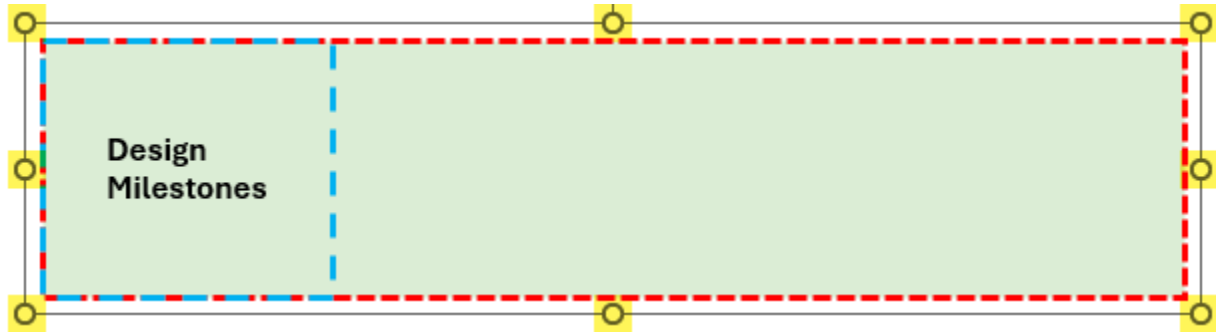
Composition of Swimlane Shapes

Presentation Pro groups two separate PowerPoint shapes together to form a Swimlane.

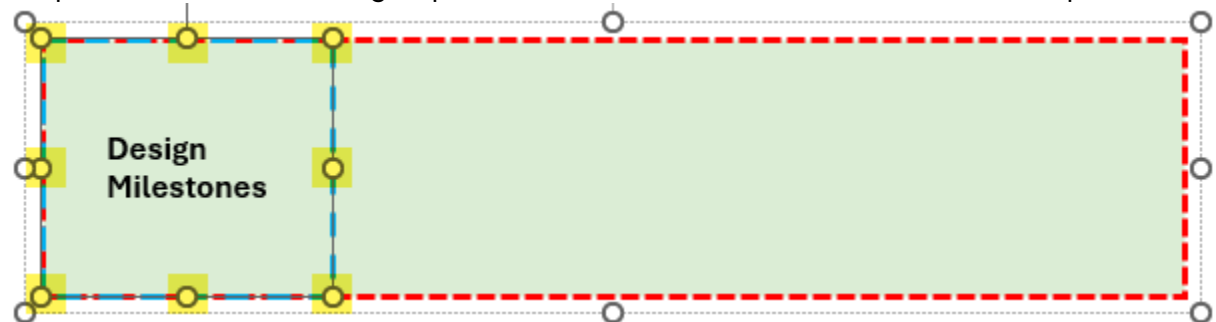


In the example above, you can see the separate shapes highlighted by the dashed outlines drawn around them. The red dashed border outlines the main rectangle of the Swimlane, while the blue dashed border surrounds the textbox within the Swimlane's left margin. You can adjust either of these shapes by the following steps:

1. Click on the Swimlane shape to select the entire group. Notice the white anchor dots that appear around the entire Swimlane.

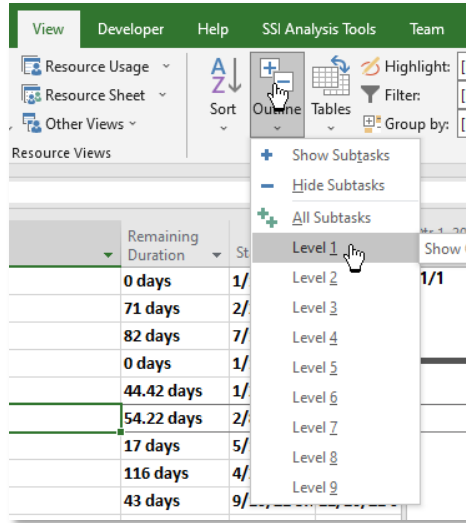
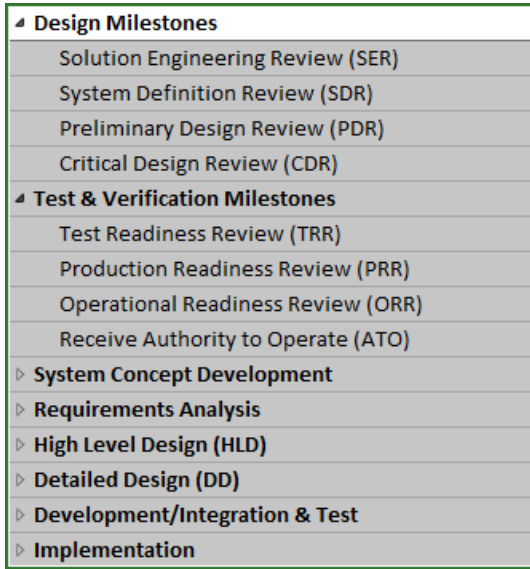
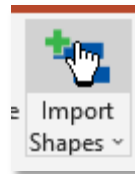


2. Click again on the specific portion of the Swimlane you want to modify. This will select only that shape within the Swimlane group. Notice the white anchor dots around that shape.



3. Make your adjustments, such as resizing, repositioning, changing colors, or editing text.
4. Click outside the group to deselect and confirm the changes.

Hands-on Exercise – Creating Swimlanes

Start of Practice Exercise	
1. Open the SSi Example Project file and set the outline level to Level 1	
2. Expand rows 3 and 8, then select all of the tasks from row 3 down.	
3. Navigate back to PowerPoint and open a blank slide. Then click the top half of the Import Shapes button in the SSi Presentation Pro Ribbon	
4. Open the Timeline Tools Task Pane by clicking Timeline Tools in the SSi Presentation Pro Ribbon	

5. In the **Margin and Height** section of the Timeline Tools, set the Left Margin to 2 and the right Margin to .5. Then click **Edit Timeline**

Margins and Height

(All margin and height are in inches)

Left margin:

Right margin:

Top margin:

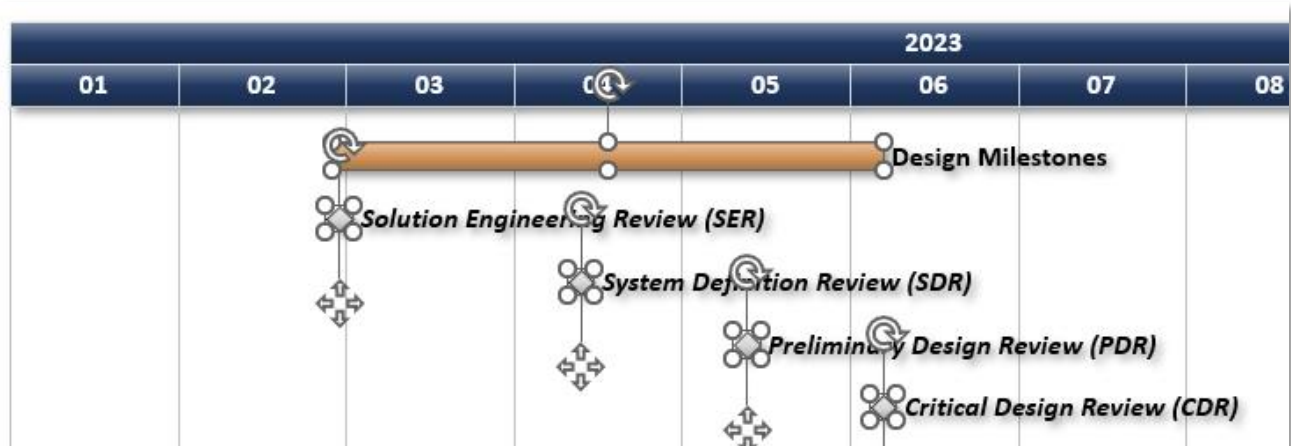
Increment height:

Vertical Grid

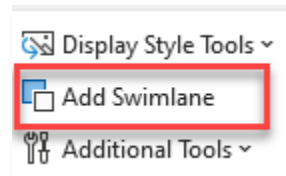
Timeline Shape Style

Edit Timeline

6. Select all of the Design Milestone task shapes on the chart



7. Open the **Swimlane Tools Task Pane** by clicking on the **Add Swimlane** button in the **SSI Presentation Pro Ribbon**



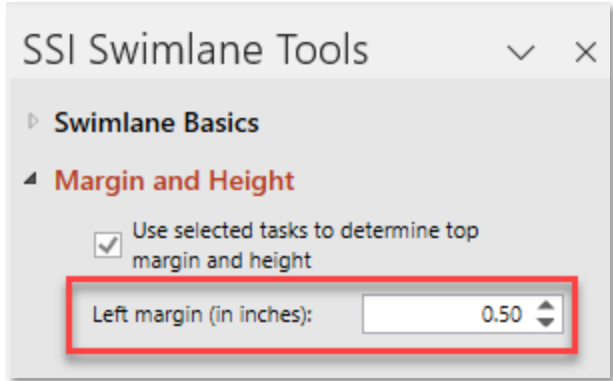
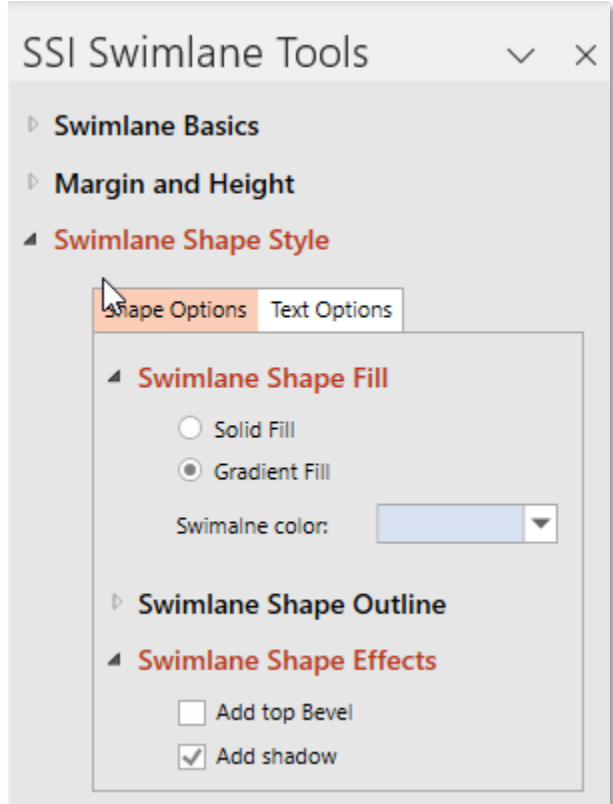
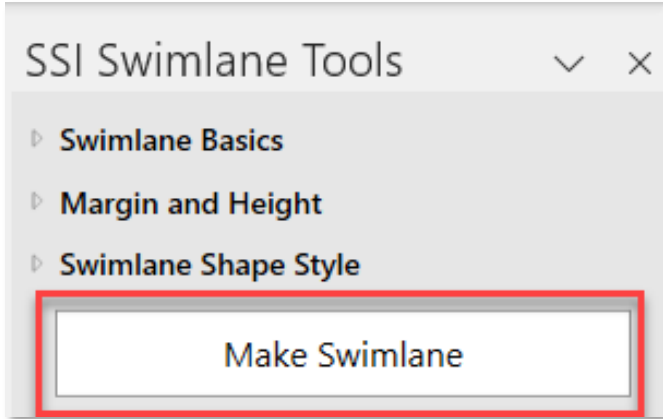
8. In the **Swimlane Basics** section of the **Swimlane Tools**, type "Design Milestones" as the Swimlane Text.

SSI Swimlane Tools

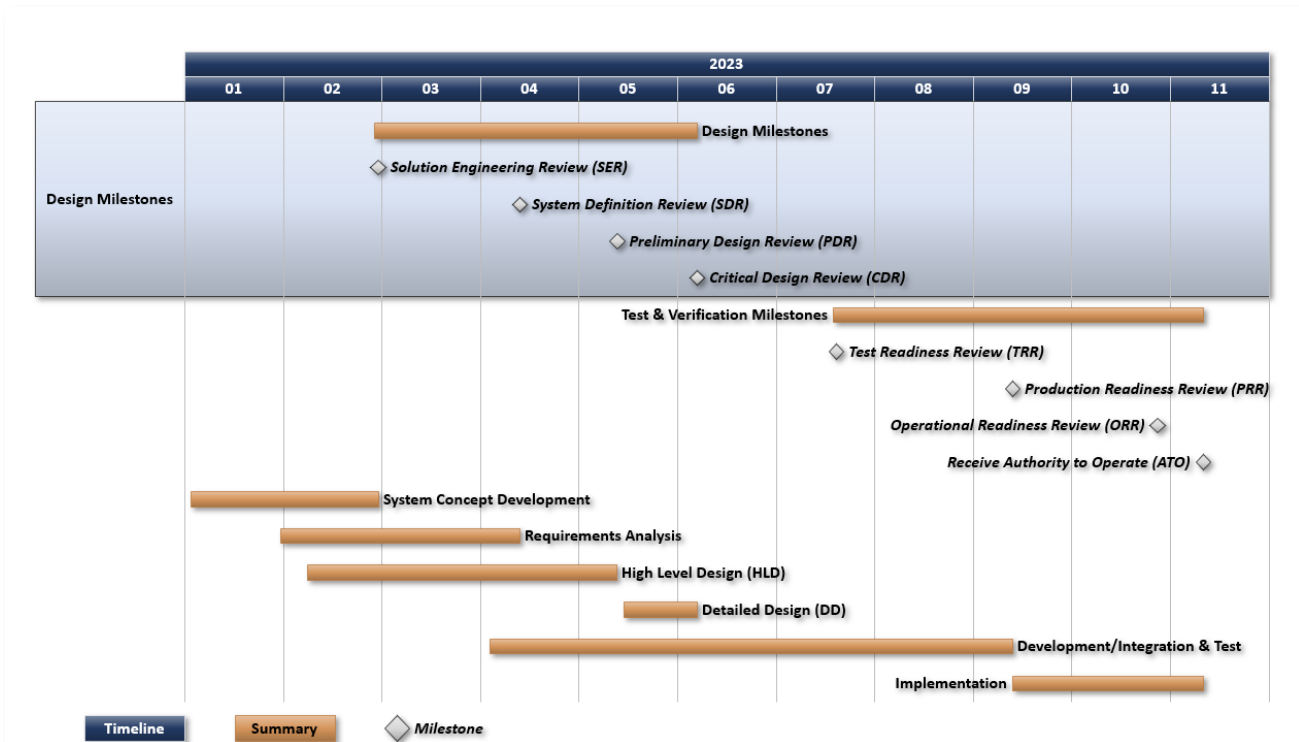
Swimlane Basics

Swimlane text:

Text direction: ☒ Horizontal ☐ Vertical

9. In the <i>Margin and Height</i> section of the <i>Swimlane Tools</i>, set the Left Margin to 0.5.	
10. In the <i>Swimlane Shape Style</i> section of the <i>Swimlane Tools</i>, choose any fill, outline, font, or special effects you like	
11. Once you are happy with your selections, click the <i>Make Swimlane</i> button at the bottom of the <i>Swimlane Tools</i>	

12. Observe the swimlane shape that has been added to the chart

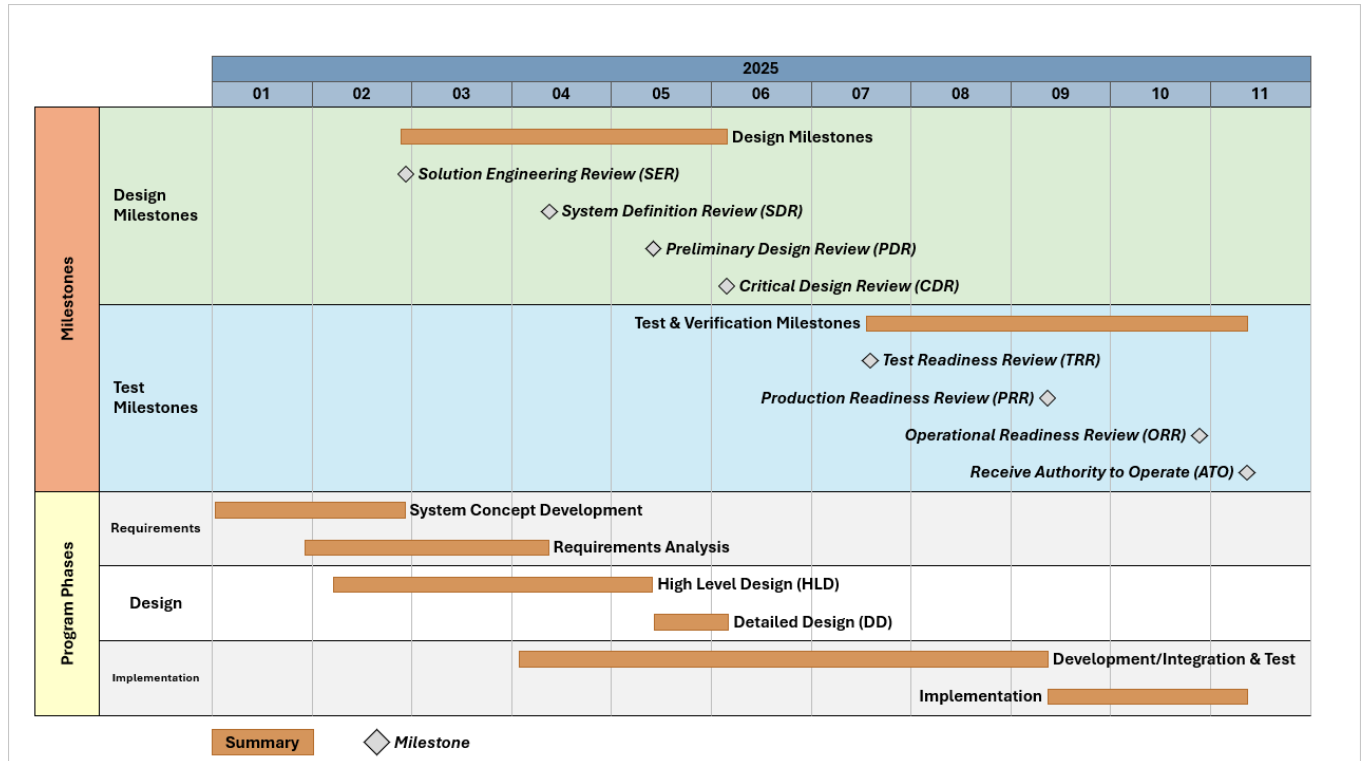


13. Select a new group of shapes and repeat the same process to add additional Swimlanes as desired.

End of Practice Exercise

Nested Swimlanes

Swimlanes are commonly used to group similar activities, but they can also be structured to group multiple Swimlanes together. This technique is known as **Nested Swimlanes** or **Swimlanes within Swimlanes**. Observe the following chart:



From this chart you can see:

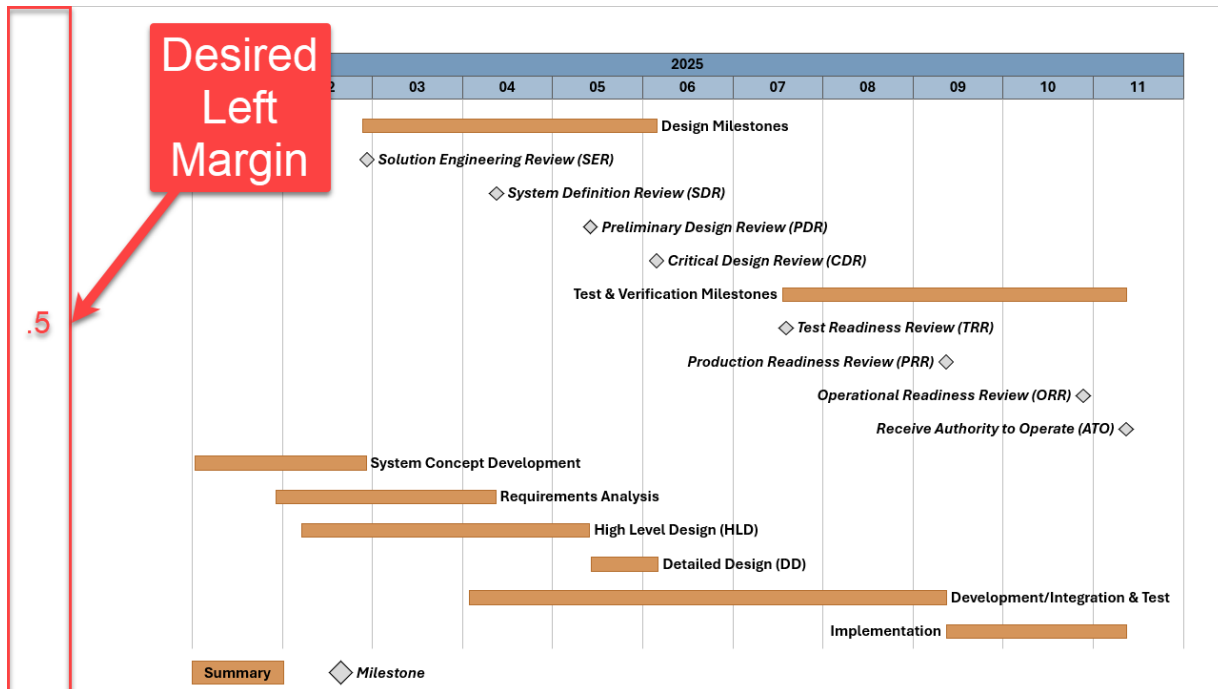
- The green **Design Milestones** and blue **Test Milestones** Swimlanes are nested within a larger orange **Milestones** Swimlane, grouping all milestone-related activities together.
- Similarly, the **Requirements**, **Design**, and **Implementation** Swimlanes are nested within the yellow **Program Phases** Swimlane, organizing different phases of the program under a common category.

Using **Nested Swimlanes** provides an additional layer of organization, helping the audience quickly understand relationships between different groups of activities while maintaining a structured visual presentation.

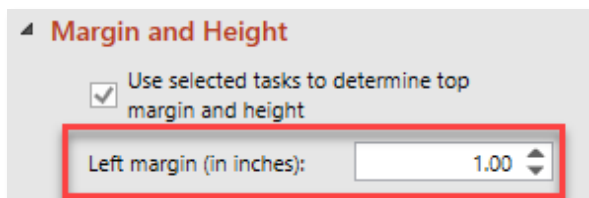
Creating Nested Swimlanes

Nested Swimlanes must be created from right to left, with the inner most Swimlanes created first, and the outer most Swimlanes created last. Make use of the **Left Margin** option within the **Margin and Height** section and the **Text Direction** option within the **Swimlane Basics** section of the **Swimlane Tools** to create Nested Swimlanes.

1. Determine the overall left margin you want to have on your chart AFTER all Swimlanes are created.



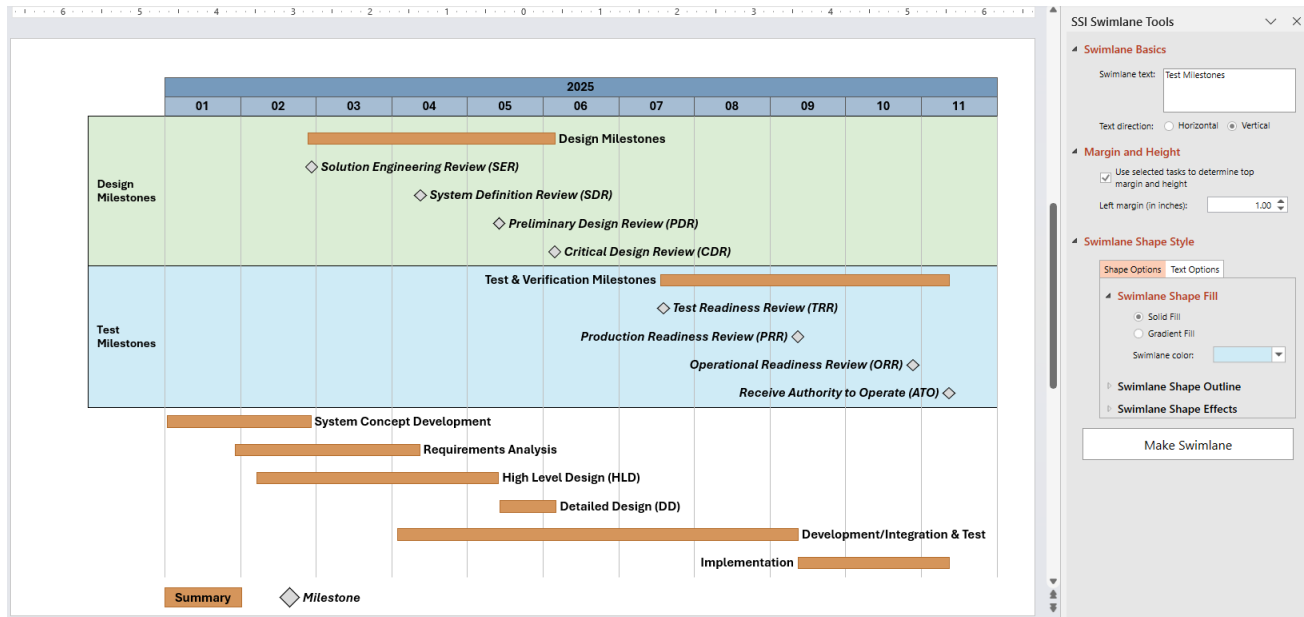
2. Create the innermost Swimlanes first. Set the left margin value of the inner Swimlanes to a larger number than the overall left margin desired



Margin and Height

☒ Use selected tasks to determine top margin and height

Left margin (in inches):



3. Create outer Swimlanes the same way you would create a normal Swimlane, but be sure to use a smaller left margin value than the inner Swimlanes

Margin and Height

☒ Use selected tasks to determine top margin and height

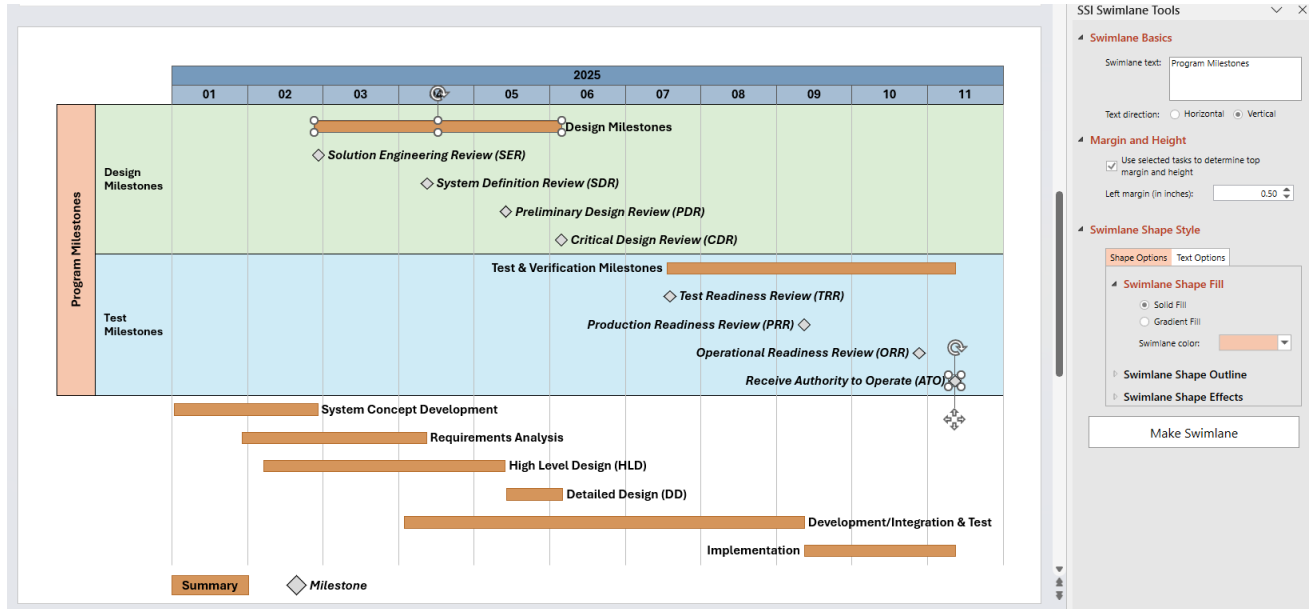
Left margin (in inches):

The smaller the left margin a Swimlanes has, the more necessary it will be to turn their **Text Direction** to the *vertical* option

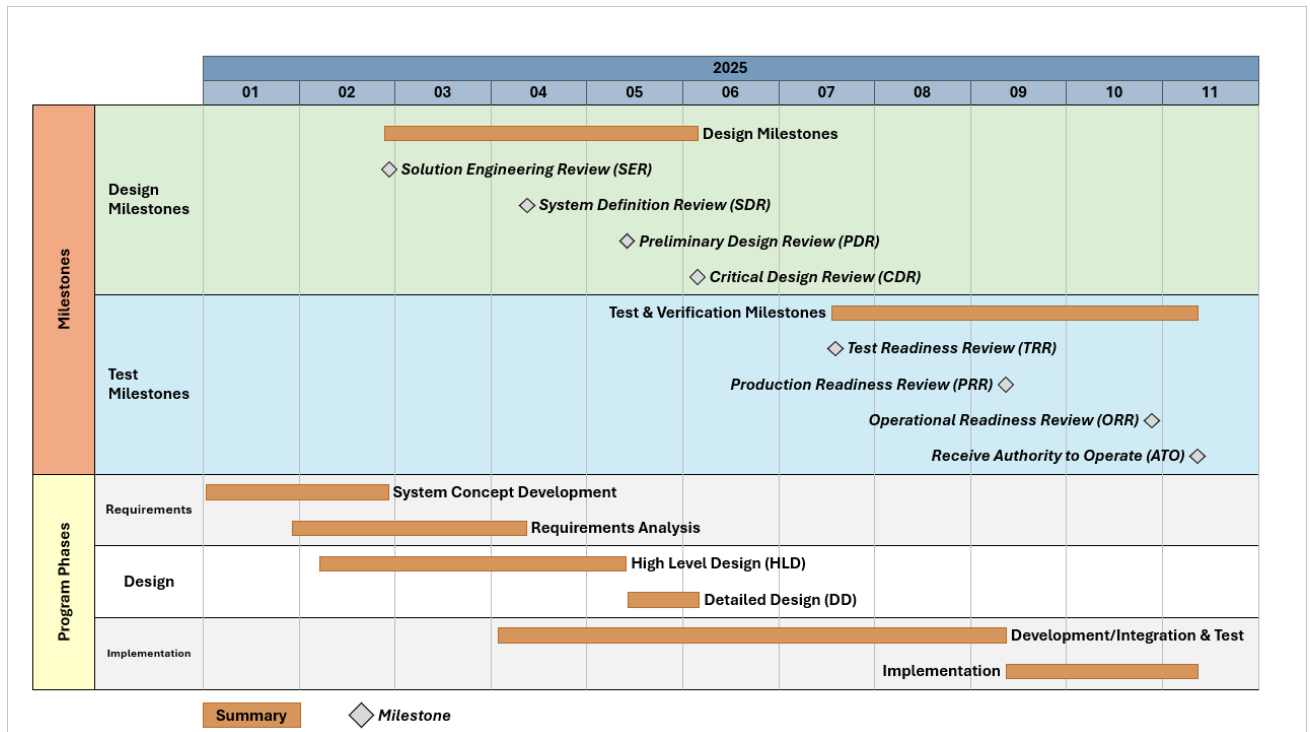
Swimlane Basics

Swimlane text:

Text direction: ☐ Horizontal ☒ Vertical



4. Repeat the same steps to create Swimlanes on the rest of the chart.

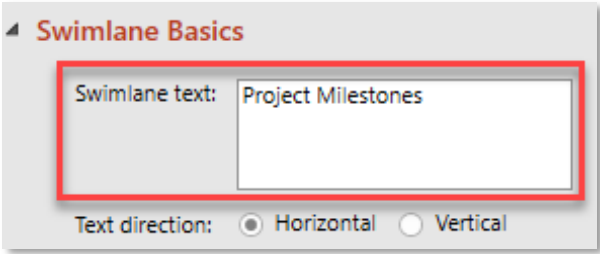
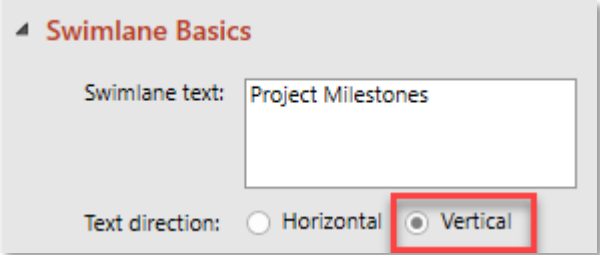
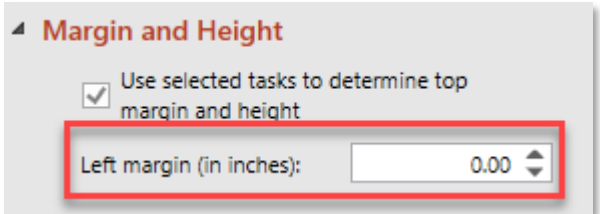
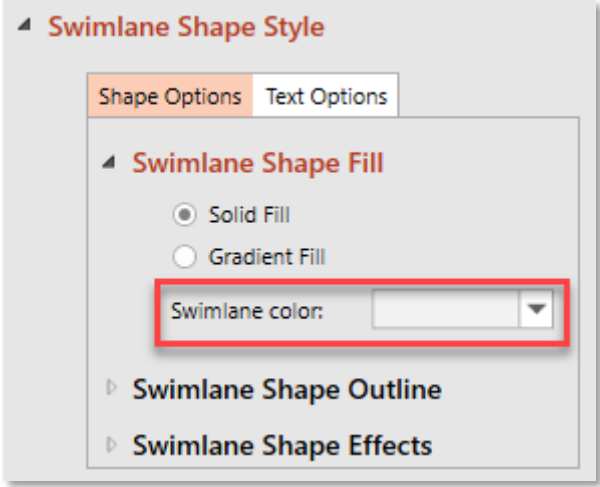
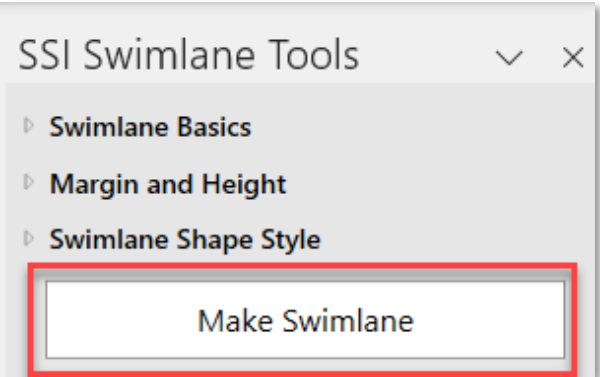


Start of Practice Exercise

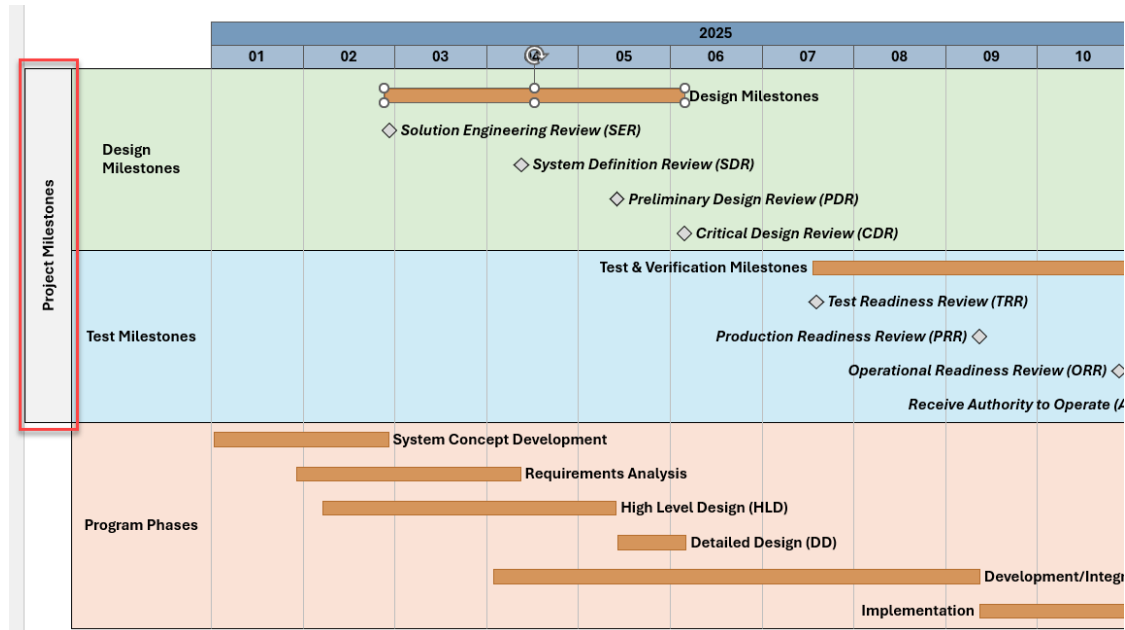
- | | | 2025 | | | | | | | | | | | |
|-------------------|--|--------------------------------|-------------------------------------|----------------------------------|-----------------------------------|--------------------------------|-------------------------------------|--------------------------------------|----|----|----|----|--|
| | | 01 | 02 | 03 | 04 | 05 | 06 | 07 | 08 | 09 | 10 | 11 | |
| Design Milestones | | | Design Milestones | | | | | | | | | | |
| | | | ◇ Solution Engineering Review (SER) | | | | | | | | | | |
| | | | | ◇ System Definition Review (SDR) | | | | | | | | | |
| | | | | | ◇ Preliminary Design Review (PDR) | | | | | | | | |
| | | | | | | ◇ Critical Design Review (CDR) | | | | | | | |
| Test Milestones | | | | | Test & Verification Milestones | | | | | | | | |
| | | | | | | | ◇ Test Readiness Review (TRR) | | | | | | |
| | | | | | | | Production Readiness Review (PRR) ◇ | | | | | | |
| | | | | | | | | Operational Readiness Review (ORR) ◇ | | | | | |
| Program Phases | | System Concept Development | | | | | | | | | | | |
| | | Requirements Analysis | | | | | | | | | | | |
| | | High Level Design (HLD) | | | | | | | | | | | |
| | | | Detailed Design (DD) | | | | | | | | | | |
| | | Development/Integration & Test | | | | | | | | | | | |
| | | | Implementation | | | | | | | | | | |

-
- The diagram illustrates the sequence of milestones in a product development lifecycle, organized into two main sections: Design Milestones and Test & Verification Milestones.
- Design Milestones (Top Section, Green Background):**
- Solution Engineering Review (SER)**: The first milestone, marked with a diamond icon.
 - System Definition Review (SDR)**: The second milestone, marked with a diamond icon.
 - Preliminary Design Review (PDR)**: The third milestone, marked with a diamond icon.
 - Critical Design Review (CDR)**: The fourth milestone, marked with a diamond icon.
- Test & Verification Milestones (Bottom Section, Blue Background):**
- Test Readiness Review (TRR)**: The first milestone in this section, marked with a diamond icon.
 - Production Readiness Review (PRR)**: The second milestone, marked with a diamond icon.
 - Operational Readiness Review (ORR)**: The third milestone, marked with a diamond icon.
 - Receive Authority to Operate (ATO)**: The final milestone, marked with a diamond icon and a circular arrow icon, indicating the end of the cycle. This milestone is highlighted with a red box.

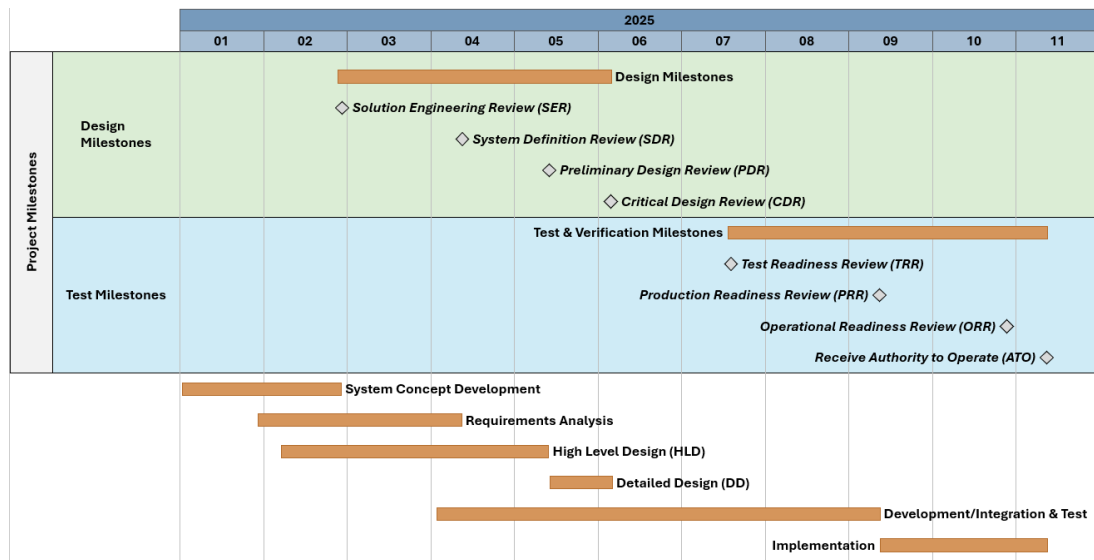
-  Display Style Tools ▾
 Add Swimlane
 Additional Tools ▾

4. In the Swimlane Basics section of the Swimlane Tools, type "Project Milestones" as the Swimlane Text.	
5. Set the Text Direction to the Vertical option.	
6. In the Margin and Height section, set the Left margin to 0.	
7. Select a fill color for the Swimlane in the Swimlane Shape Style section of the Swimlane Tools.	
8. Click the Make Swimlane button at the bottom of the Swimlane Tools.	

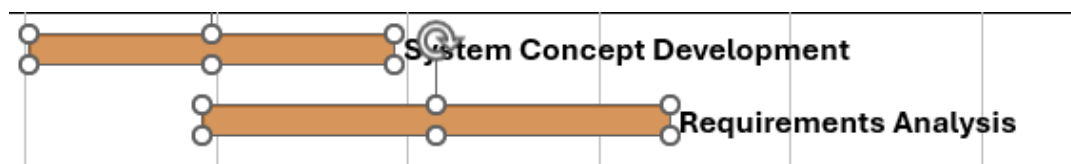
9. Observe the new swimlane on the chart:

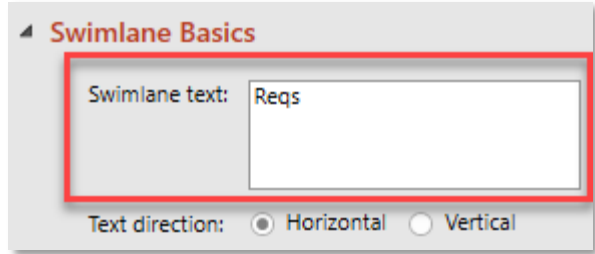
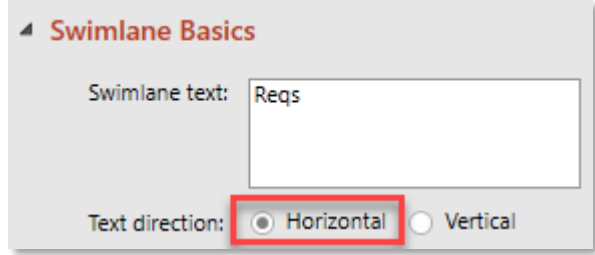
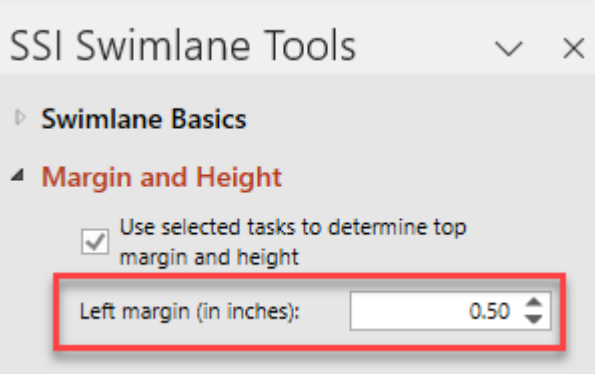
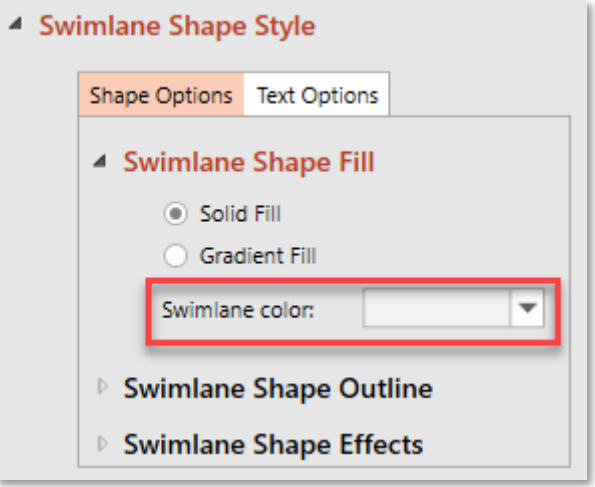
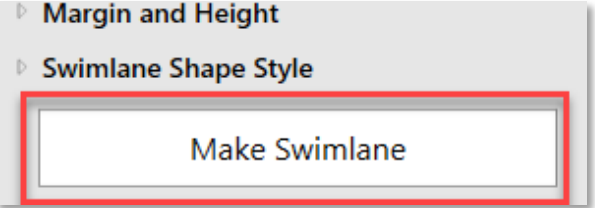


10. Delete the *Program Phases* swimlane shape on the chart.

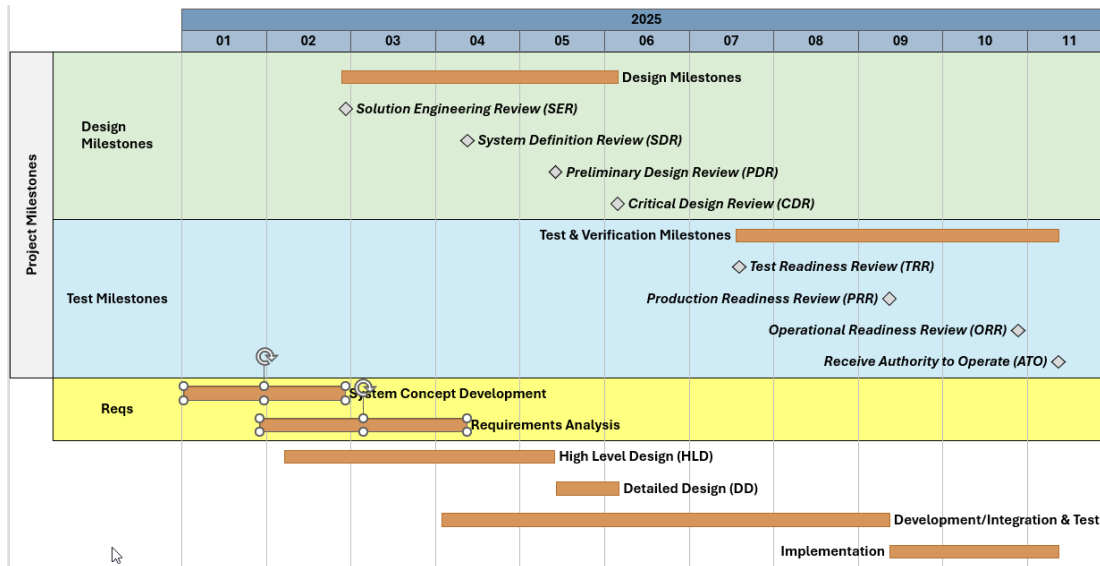


11. Select the *System Concept Development* and *Requirements Analysis* summary shapes.

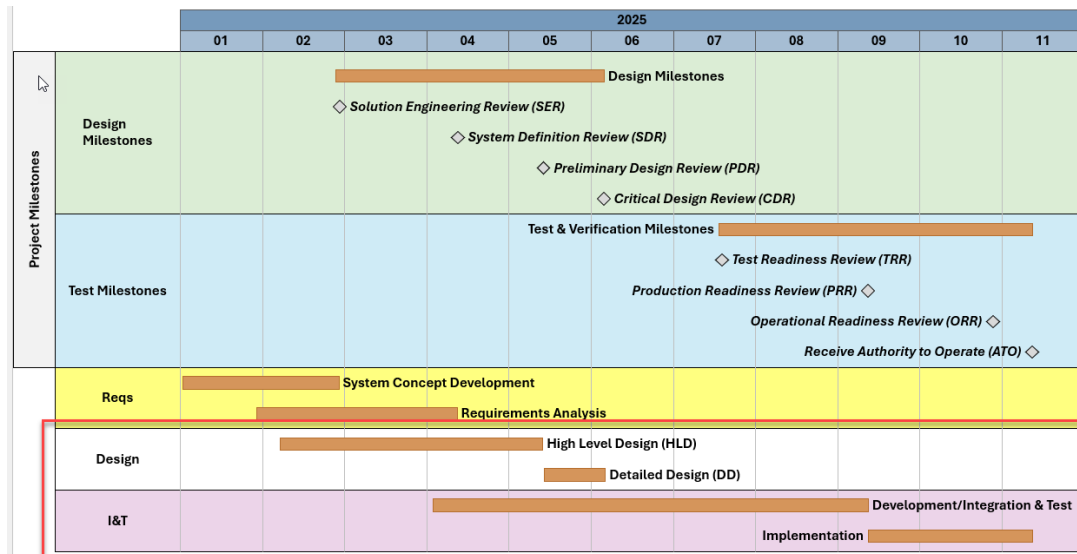


12. In the <i>Swimlane Basics</i> section of the <i>Swimlane Tools</i>, type "Reqs" as the Swimlane Text.	
13. Set the <i>Text Direction</i> to the <i>Horizontal</i> option.	
14. In the <i>Margin and Height</i> section of the <i>Swimlane Tools</i>, set the Left Margin to 0.5.	
15. Select a fill color for the Swimlane in the <i>Swimlane Shape Style</i> section of the <i>Swimlane Tools</i>.	
16. Click the <i>Make Swimlane</i> button at the bottom of the <i>Swimlane Tools</i>.	

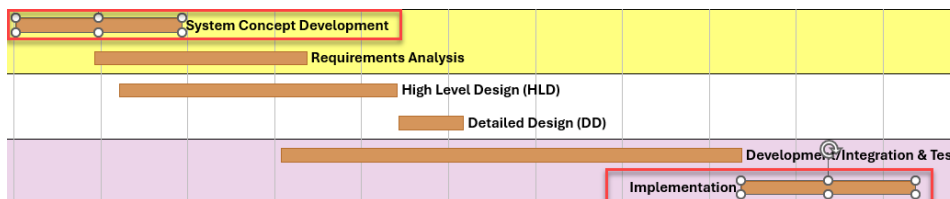
17. Observe the chart:

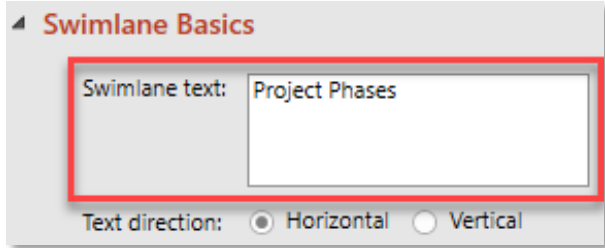
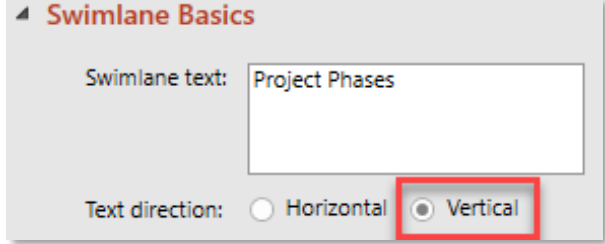
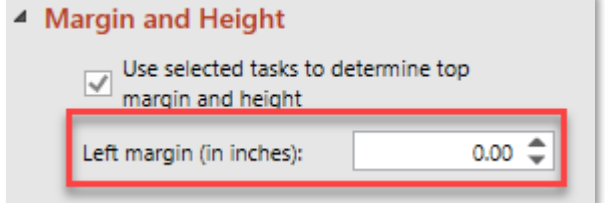
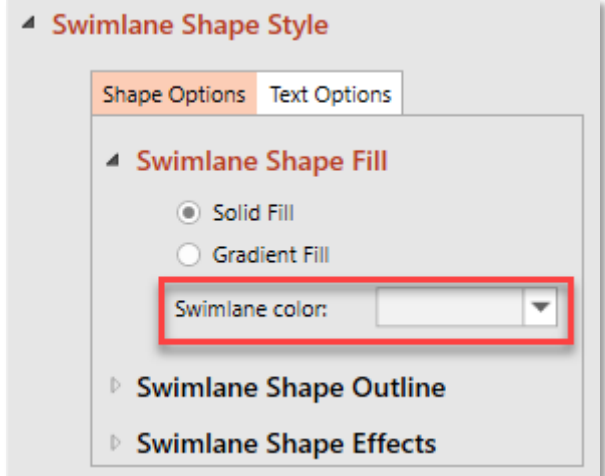
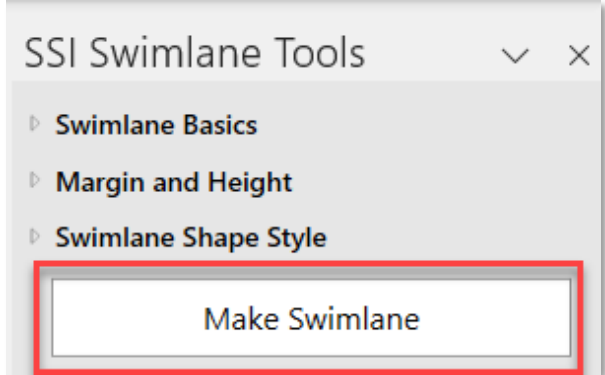


18. Create an additional Swimlane around the other summary activities like shown:

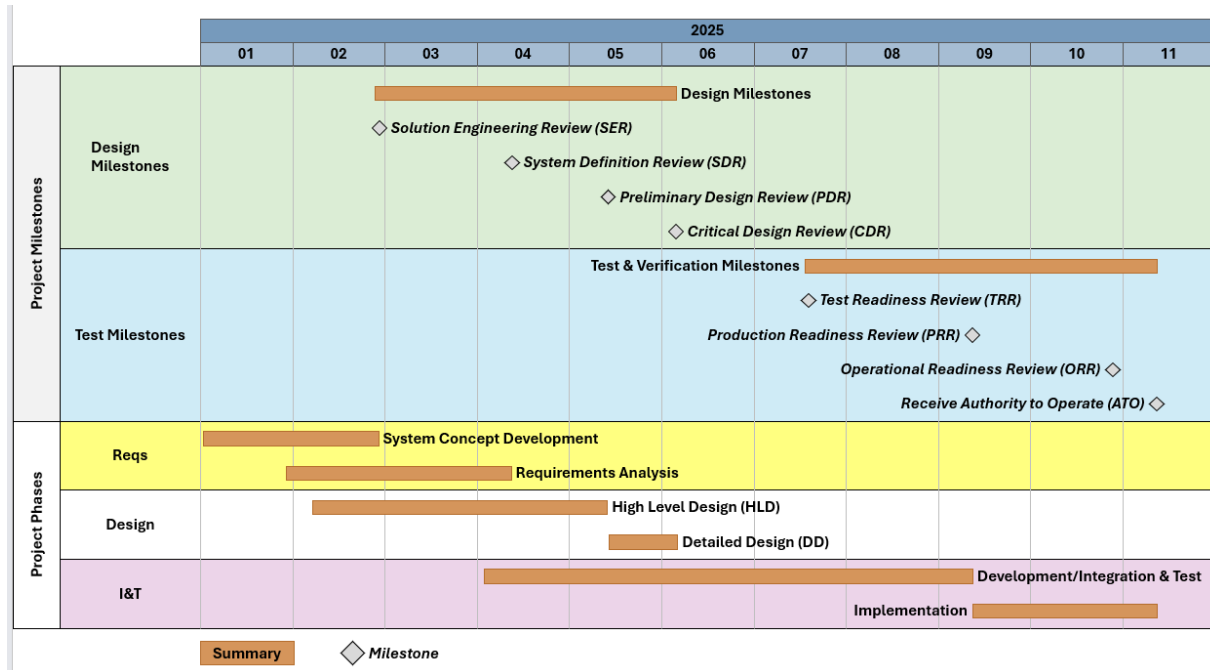


19. Select the *System Concept Development* summary shape and the *Implementation* summary shape on the chart



20. In the Swimlane Basics section of the Swimlane Tools, type "Project Phases" as the Swimlane Text.	
21. Set the Text Direction to the Vertical option.	
22. In the Margin and Height section, set the Left margin to 0.	
23. Select a fill color for the Swimlane in the Swimlane Shape Style section of the Swimlane Tools.	
24. Click the Make Swimlane button at the bottom of the Swimlane Tools.	

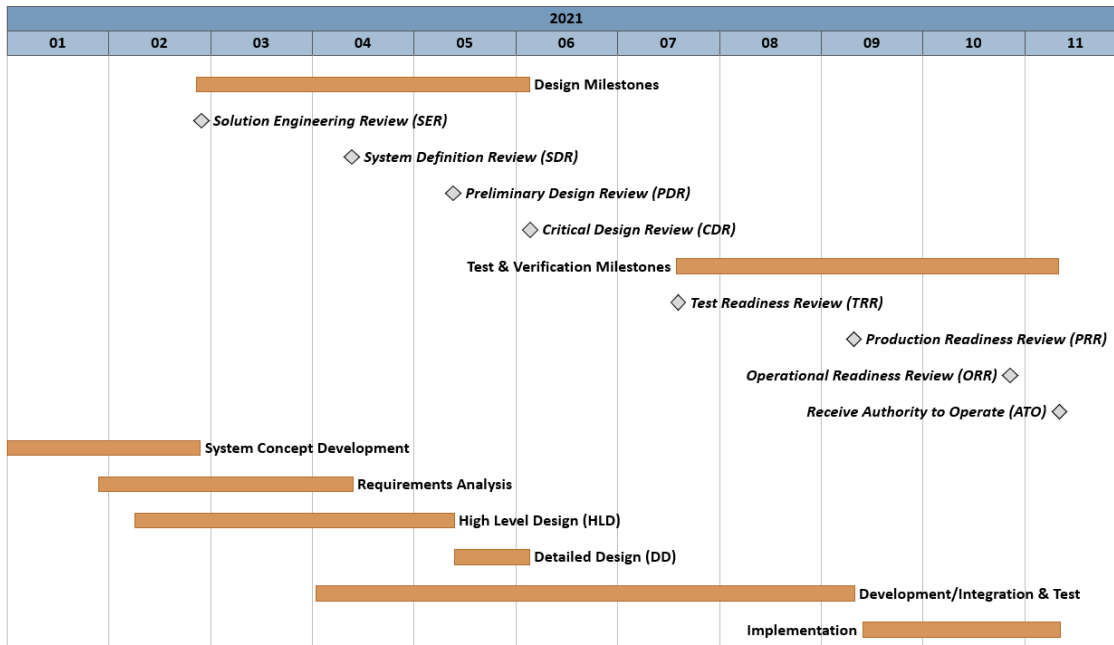
25. Observe the chart:



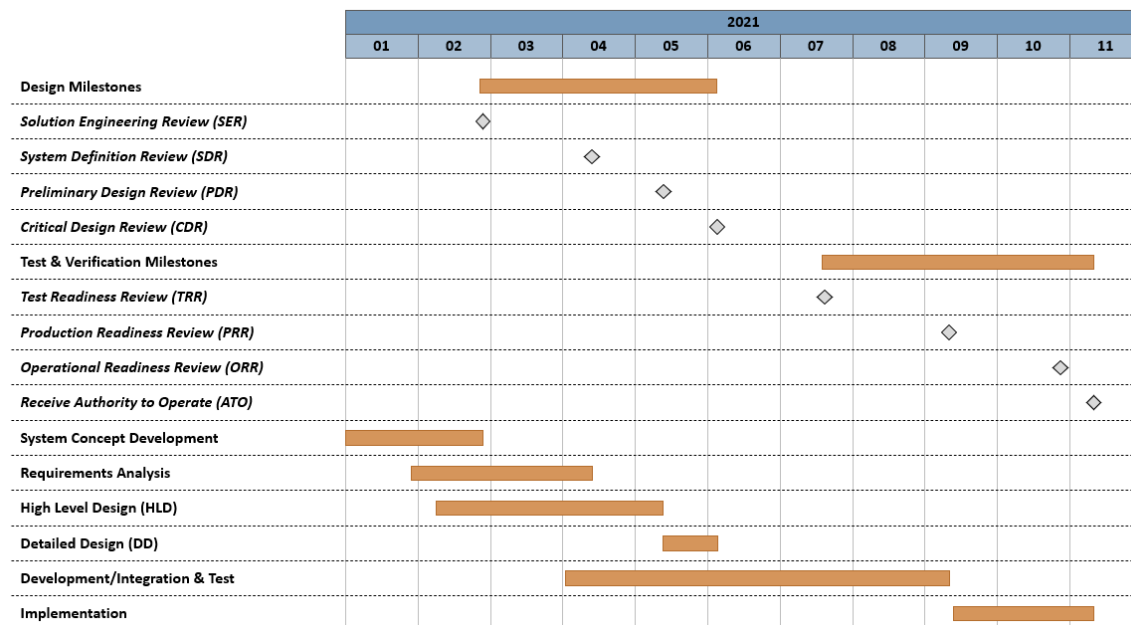
End of Practice Exercise

Waterfall and Gantt Display Styles

Presentation Pro allows users to toggle between two different chart display styles, **Waterfall**:



and **Gantt Style**.

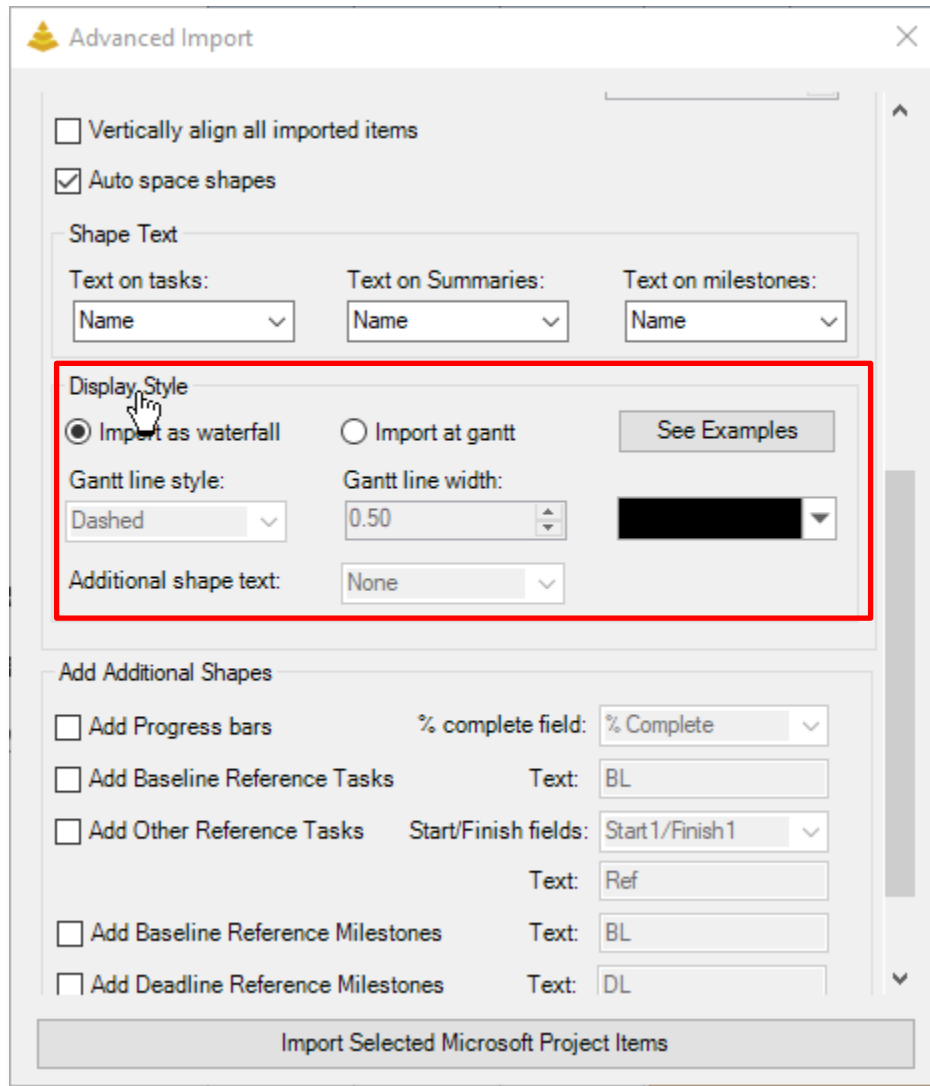


In Gantt style, the text of activity shapes is placed in the left margin of the chart. This style more closely resembles the view Gantt Chart view in Microsoft Project.

The style can be selected when initially importing activities and can be changed after the chart has already been created. **Waterfall** is the default style. Either of these styles can be toggled to the other at any time with the simple press of a button.

Selecting the Display Style When Importing Items

When initially importing MS Project items on the PowerPoint slide, the display style can be set by opening the **Advanced MS Project Import** form and setting the options in the **Display Style** group.



Advanced Import

☐ Vertically align all imported items

☒ Auto space shapes

Shape Text

Text on tasks: Text on Summaries: Text on milestones:

Display Style

☒ Import as waterfall ☐ Import at gantt

Gantt line style: Gantt line width:

Additional shape text:

Add Additional Shapes

☐ Add Progress bars % complete field:

☐ Add Baseline Reference Tasks Text:

☐ Add Other Reference Tasks Start/Finish fields: Text:

☐ Add Baseline Reference Milestones Text:

☐ Add Deadline Reference Milestones Text:

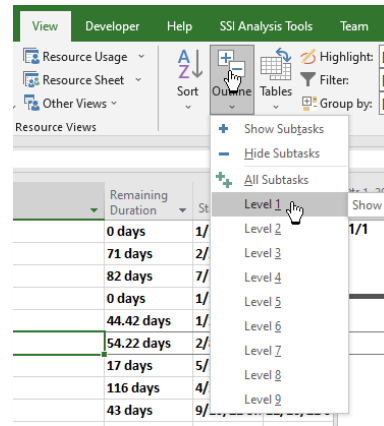
If the **Import as Gantt** option is selected, the Gantt style options become available. This includes the **Gantt line style**, **Gantt line width** (thickness), **Gantt line color**, and **Additional shape text**.

Once the **Import Selected Microsoft Project Items** button is clicked, all selected tasks in MS Project will import into the selected display style.

Hands-on Exercise – Importing Shapes in a Gantt Style

Start of Practice Exercise

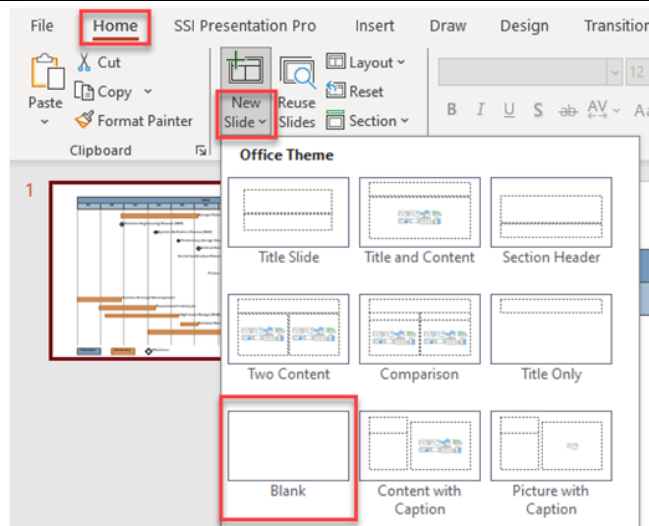
1. Open the SSI example project (ExampleProject.mpp) file and set the outline level to level 1



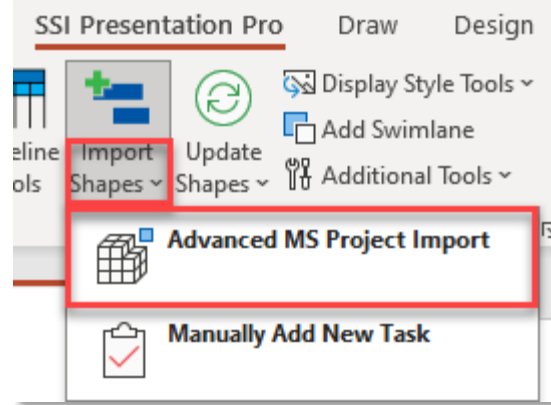
2. Expand row's 3 and 8, then select all of the tasks from row 3 down.



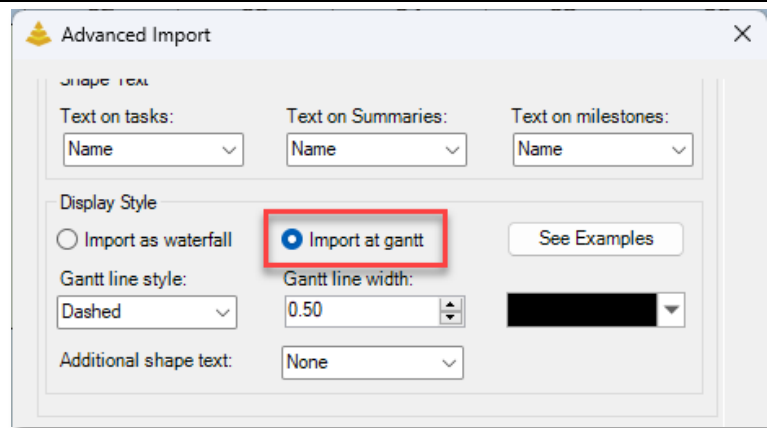
3. Navigate back to PowerPoint and add a blank slide to a Presentation.



4. In the *SSI Presentation Pro Ribbon*, click the lower half of the *Import Shapes* button and select the *Advanced MS Project Import* option to open the *Advanced Import* form.

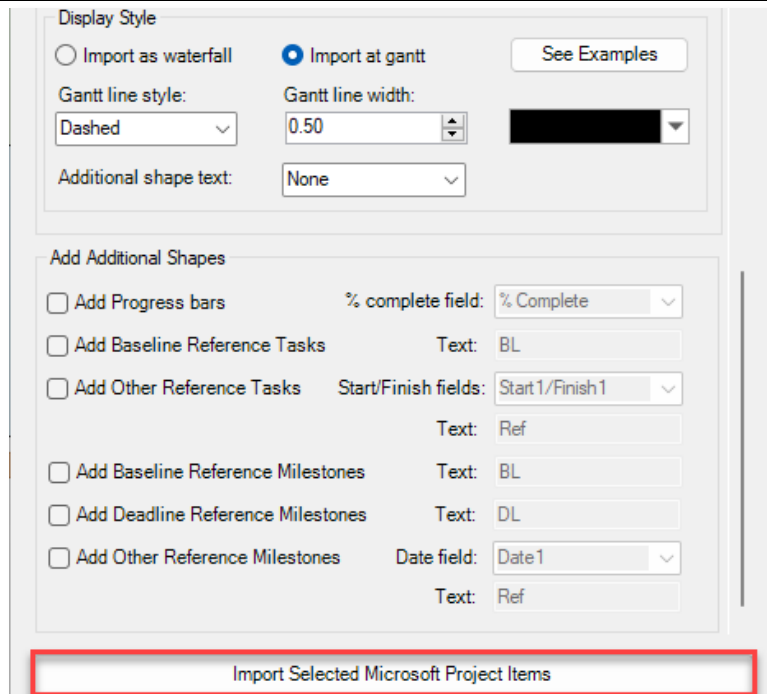


5. Scroll down to the *Display Style* section of the form and choose the *Import as Gantt* option.



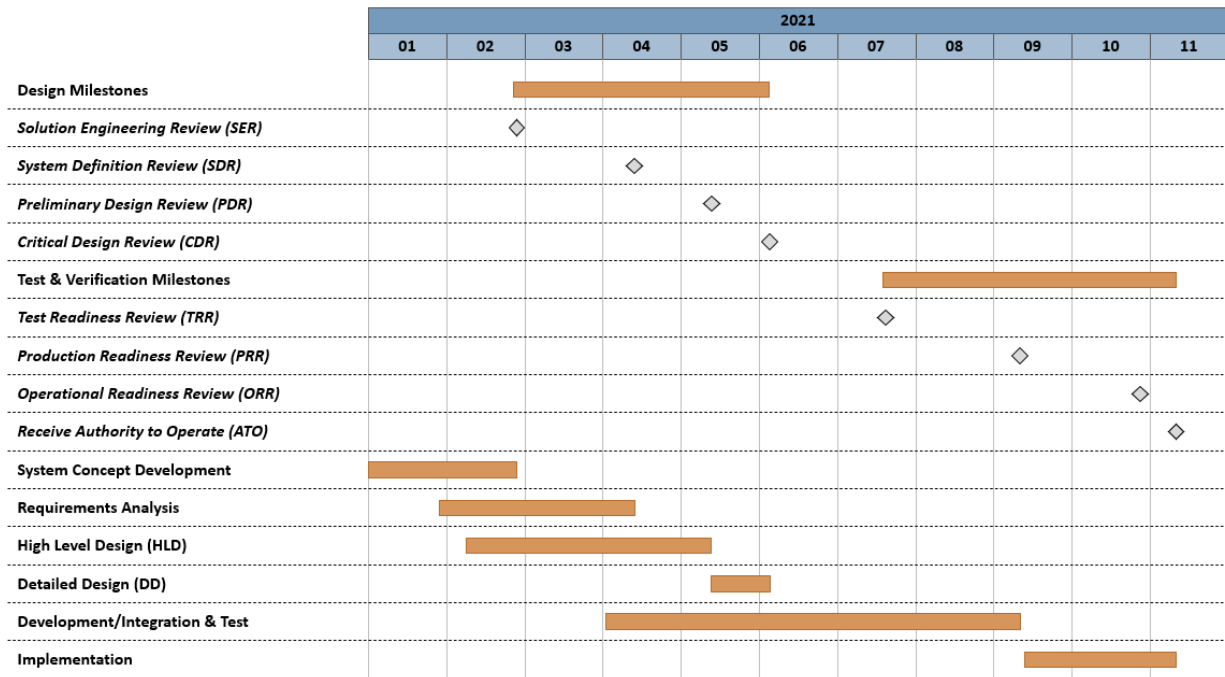
The screenshot shows the 'Advanced Import' dialog box. In the 'Display Style' section, the 'Import at gantt' radio button is selected and highlighted with a red box. Other options include 'Import as waterfall'. Below this, there are settings for 'Gantt line style' (Dashed) and 'Gantt line width' (0.50). There are also dropdowns for 'Text on tasks', 'Text on Summaries', and 'Text on milestones', all set to 'Name'. A 'See Examples' button is visible.

6. Click the *Import Selected Microsoft Project Items* button at the bottom of the *Advanced Import* form.



The screenshot shows the bottom section of the 'Advanced Import' dialog box. The 'Import Selected Microsoft Project Items' button is highlighted with a red box. Above it, there are checkboxes for 'Add Progress bars', 'Add Baseline Reference Tasks', 'Add Other Reference Tasks', 'Add Baseline Reference Milestones', 'Add Deadline Reference Milestones', and 'Add Other Reference Milestones'. Each checkbox has associated fields for text and date. The 'Import at gantt' radio button is still selected.

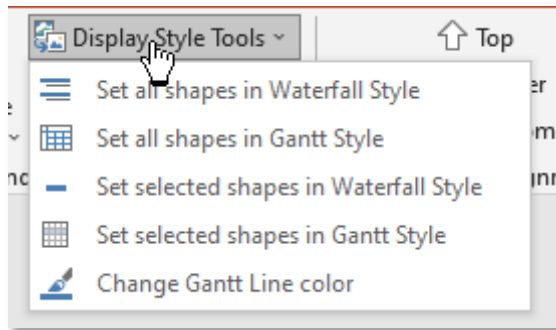
7. Observe the chart created:



End of Practice Exercise

Changing the Display Style on an Existing Chart

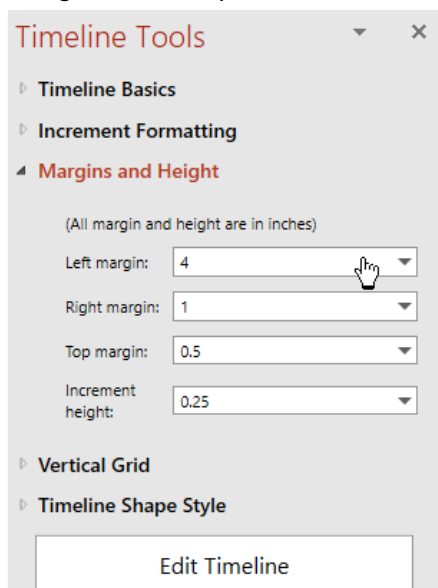
After shapes have been imported onto a chart, the display style can be changed between **Waterfall** or **Gantt** by using the **Display Style Tools** in the Presentation Pro ribbon.



Options in the display style tools include the following:

- **Set All Shapes in Waterfall Style**
 - This option will convert all of the task shapes on the active slide into Waterfall style.
- **Set all Shapes in Gantt Style**
 - This option will convert all of the task shapes on the active slide into Gantt style.
- **Set Selected Shapes in Waterfall Style**
 - This option will convert only the selected shapes on the active slide into Waterfall style
- **Set Selected Shapes in Gantt Style**
 - This option will convert only the selected shapes on the active slide into Gantt style
- **Change Gantt Line Color**
 - This option will allow a user to change color of the horizontal lines for shapes set into Gantt Style on the active slide

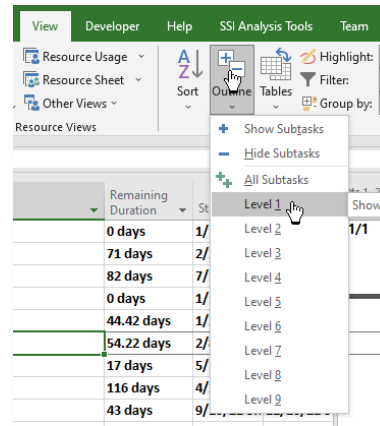
Tip: when changing the display style to **Gantt**, use the Timeline Tools give your timescale enough left margin to fit shape names well.



Hands-on Exercise – Changing the Display Style on an Existing Chart

Start of Practice Exercise

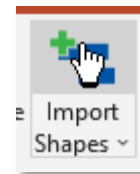
1. Open the SSI example project (ExampleProject.mpp) file and set the outline level to level 1



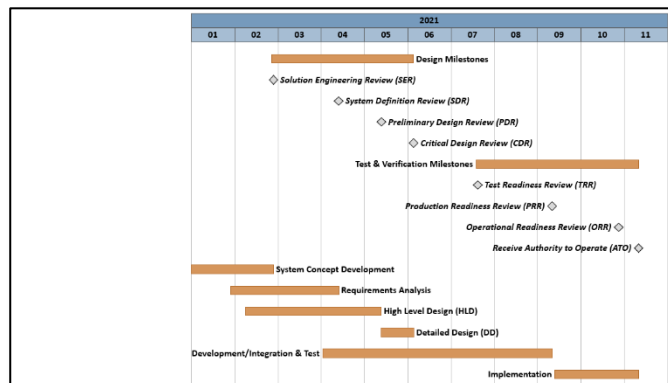
2. Expand row's 3 and 8, then select all of the tasks from row 3 down.



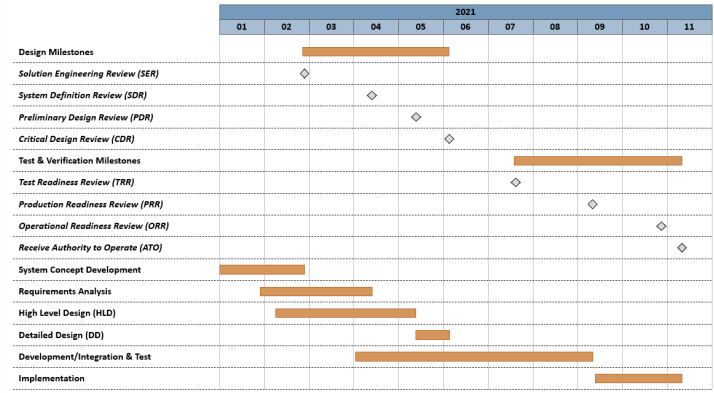
3. Navigate back to PowerPoint and open a blank slide. Then click the top half of the **Import Shapes** button in the **SSI Presentation Pro Ribbon**



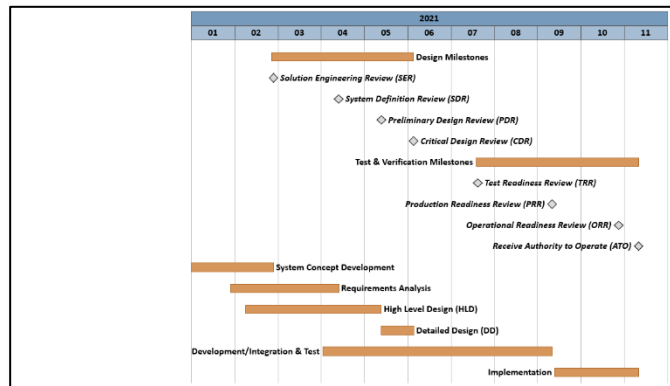
4. Once the shapes have been imported onto the page, open the **Timeline Tools**. Expand the **Margin & Height** node and set the left margin to 4 inches. Then click **Edit Timeline**



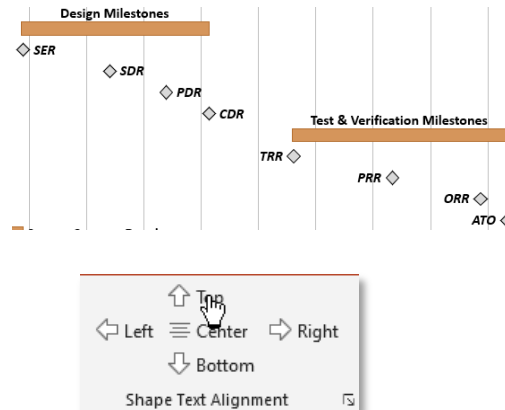
5. Open the *Display Style Tools* menu in the *SSI Presentation Pro Ribbon*. Select the option to *Set all tasks in Gantt Style*



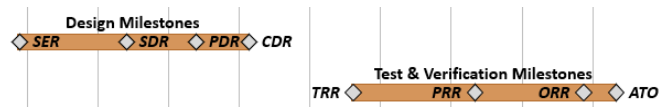
6. Open the *Display Style Tools* menu in the *SSI Presentation Pro Ribbon*. Select the option to *Set all tasks in Waterfall Style*



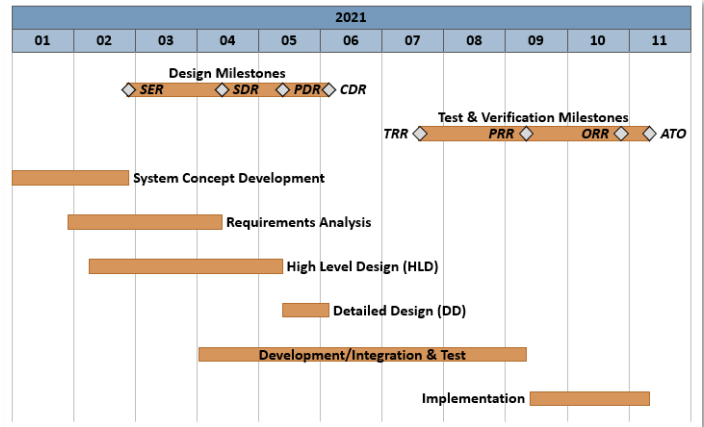
1. Change the text on the milestones to just show their abbreviated names (SER, SDR, PDR, etc.). Move the Text of the **Design Milestones** and **Test & Verification Milestones** summary lines to be oriented at the top of the shape (select the summary shapes and use the **Top** button in the **Shape Text Alignment** group to do this)



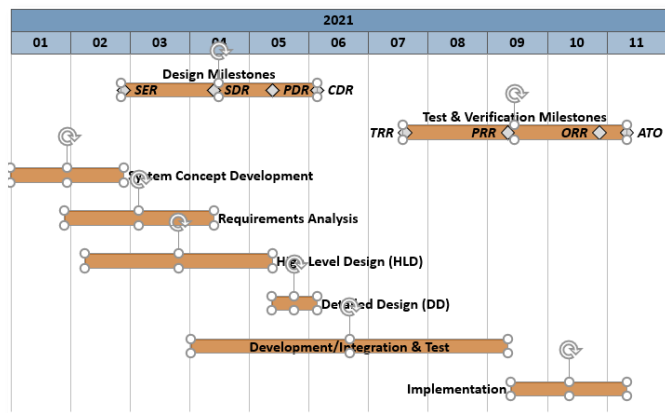
2. Select the **Design Milestones** summary along with the **SER, SDR, PDR, & CDR** milestones. Then click the **Align Selected Shapes** button in the **Alignment Tools** menu. Do the same for the Test and Verification Summary and Milestones.



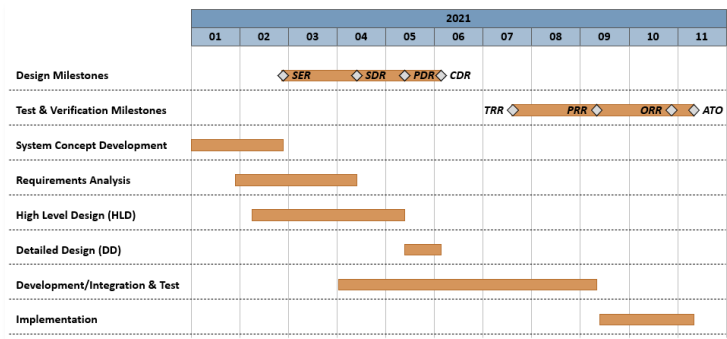
- Click the **Distribute Vertical Spacing** button in the **Alignment Tools** menu. Notice that Presentation Pro will keep all of the Design Milestones and the Test & Verification Milestones aligned.



- Select All of the summary tasks in the chart, not the milestones.



- Open the **Display Style Tools** menu in the **SSI Presentation Pro Ribbon**. Select the option to **Set selected tasks in Gantt Style**. Then click the **Distribute Vertical Spacing** button in the **Alignment Tools** menu



End of Practice Exercise