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610 Opperman Drive
Eagan, MN 55123-1396
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1 About Case Timeline

Case Timeline provides tools for creating timeline charts for a wide variety of chronological data.

What do you want to do?

- Create, open, or save timelines (see "Working with Timelines" on page 4 for more information).
- View graphical displays of your data, view a chronology of events, and view a list of events (see "The Case Timeline Interface" on page 2 for more information).
- Import CSV, TXT, TAB, or ASC file types to create events or export timeline data in CSV, TAB, or TXT format (see "Importing and Exporting Events" on page 4 for more information).
- Add, modify, or delete events or categories (see "Working with the Event Entry Tab" on page 6 for more information).
- Link documents, images, audio files, emails, videos, and websites to an event (see "Linking Files and Source Documents to Events" on page 8 for more information).
- Search for and select subsets of events based on their date and/or content (see "Searching for and Selecting Events" on page 8 for more information).
- Create a bar chart or flag chart to display the data in your timeline file in a graphical format (see "Working with Charts" on page 10 for more information).
- Customize the look and feel of your chart (see "Customizing Charts" on page 11 for more information).
- View and customize a formatted text report of the events in the timeline (see "Customizing the Chronology Report" on page 15 for more information).
- Print timelines or use the Print Preview feature to customize your charts before printing (see "Printing Timelines" on page 17 for more information).
- Share your timelines with other users by saving them to PDF, HTML, or graphic format; emailing them; copying them; or packaging them (see "Sharing Timelines" on page 18 for more information).
2 The Case Timeline Interface

When you initialize Case Timeline, a startup screen displays that allows you to create a new timeline, open an existing timeline, or view a sample timeline. You can disable this screen by clearing the check box for Show this every time at the bottom of the screen. You can select to display the startup screen by clicking the Tools menu, selecting Options, and checking Display startup screen on the General tab.

Once you open a timeline, the Case Timeline interface allows you to open and work with timeline data. The Chart List displays on the left and tabs displaying timeline events display on the right. You can also use the buttons at the bottom of the window to switch between Event Entry, Chart, and Chronology tab views. Click the Tools menu and select Options to set display options, file locations, and spell check preferences.

Chart List

Every time you create a new bar chart or flag chart it is saved in the Chart List in the left frame. You can assign titles to your charts and duplicate or delete charts. You also use the Chart List for your presentations, including determining which charts to include, the chart sequence, and transition options. For more information, see "Working with Charts" on page 10.

- Assign a chart title: By default, all charts in the Chart List are named Untitled. To assign a different title, right-click the chart, select Rename, then type the new title in the box.
- Delete or Duplicate a chart: Delete or duplicate a chart from the Chart List by right-clicking the chart and selecting Delete or Duplicate.
- Rearrange the chart sequence: Rearrange the charts in the Chart List in any sequence. Rearranging the charts affects the order in which they display in a presentation (see "Creating and Viewing Presentations" on page 16 for more information). To change the order of a chart, drag the chart to the desired position.

Event Entry

Use the Event Entry tab to add, modify, or delete events and categories. Here you can also select and sort data for inclusion in chronologies or charts. You can sort by column value, rearrange columns in the table, and adjust the column width and row height. For more information, see "Working with the Event Entry Tab" on page 6.

- Adjusting column width: Rest the mouse cursor on right side of the column boundary you want to adjust until it becomes a resize cursor (double-headed arrow), and then drag the boundary until the column is the width you want.
- Adjusting row height: Rest the mouse cursor on the bottom of the row boundary you want to adjust until it becomes a resize cursor (double-headed arrow), and then drag the boundary until the row is the height you want. Reset the row height by right clicking on a row and selecting Auto-adjust row height. To reset all rows to the height needed to display all of the information in any cell in that row, click the View menu and select Auto-adjust all row heights.
- Sorting by column value: Point to a column header and click the arrow that displays next to the column name to sort the table by the values in that column. Click the arrow again to reverse the sort order.
- Rearranging columns: Drag the column that you want to move horizontally to the position that you want.
- Managing Custom Columns: Click the Edit menu and select Manage Custom Columns (or right click on a column heading and select Manage Custom Columns), to create, edit, delete, or rearrange custom columns. For more information, see "Managing Custom Columns" on page 7.
Chart
Use the Chart tab to display and work with graphical representations of the data in your timeline file. For more information, see "Working with Charts" on page 10.

Chronology
Use the Chronology tab to view a formatted text report of the events in the timeline. For more information, see "Customizing the Chronology Report" on page 15.
3 Working with Timelines

Create a new timeline, open an existing timeline, and save a timeline.

Creating a New Timeline
Create a new timeline by:

- Clicking Create a New Timeline on the startup screen.
- Clicking the New toolbar button.
- Clicking the File menu and selecting New.

A new timeline requires you enter events, choose a timeline format (chronology, bar chart, or flag chart), and create your presentation.

Opening an Existing Timeline
To open an existing timeline file, click the Open toolbar button or click the File menu, and select Open. Select the file you want to open and click Open.

Saving a Timeline
To save a timeline file, click the Save toolbar button or click the File menu and select Save. Type a name for the file in the File name box and click Save. By default, your files are saved in the My Timelines folder within the My Documents folder.

Importing and Exporting Events
Import CSV, TXT, TAB, or ASC file types to create events in Case Timeline. Note that the imported file must contain at least one event and a date for successful import. All events are imported into the current timeline file, but they only display in the chart currently selected in the Chart List (see "The Case Timeline Interface" on page 2 for more information). To display the imported events in another chart, select the chart in the Chart List, then select the events on the Event Entry tab that you want to display.

IMPORTING EVENTS
If you import a Case Timeline file, the fields are automatically mapped for you. To import events into Case Timeline:

1. Click the File menu, and select Import.
2. Select a file type from the Files of type list.
3. Select the file you want to import and click Open.
4. Enter field delimiter information. For detailed information on delimiters, see "About Delimiters" on page 5.

- Treat consecutive delimiters as one: Check this box to treat multiple delimiters that are next to each other as one delimiter (for example, if there are two sets of quotes delimiting text "" and you want them to be treated as one delimiter, not two).
- Field delimiter: This box is automatically filled in for you. Choose from the following format options: ; {space} {tab} | ^
- Row delimiter: This box is automatically filled in for you. {newline} indicates the end of the line character. This field supports up to seven characters.
- Text Qualifier: This box is automatically filled in for you. Choose from the following format options: " '{none}
- First row contains field names: This option is enabled when appropriate. Check this option to exclude column headings from the import.
5. Click Next to enter the field mappings information. Here you assign a title to each field in the file by mapping the field. For example, to map the first field, which in this example contains Event Names, click to select the [none] column. Then select Event Name from the Select column and assign appropriate field 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 select Do not import column (skip) from the list.
7. Click Finish.
8. Optionally, click Yes to view a summary the results of the import.

EXPORTING EVENTS
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:
1. Click the File menu, and select Export.
2. Type a name for the file in the File name box.
3. Select a file type from the Save as type list.
4. Click Save.

SENDING KEY FACTS FROM CASE NOTEBOOK
You can export key facts from Case Notebook and display them as events in Case Timeline. From the Case Notebook Key Facts List, click the Send toolbar button and select a Case Timeline option. Upon send, Case Notebook users choose whether to import into the existing opened Timeline, open a different one, or create a new one. If you modify a key fact in Case Notebook, you must resend the key fact to Case Timeline to update the event (only the modified information in the key fact is sent from Case Notebook). Key facts sent to Case Timeline are displayed on the Event Entry tab. Case Notebook key facts information maps as follows to Case Timeline:
• Title - Event Name
• Description - Notes

ABOUT DELIMITERS
When saving a file to a different format, the receiving application may require fields to be defined in order to properly read and open the file. For example, if you are saving a text file in a format for Microsoft Excel, Excel would need to know where to begin and end fields in that file.

Field delimiters and field separators provide a way to separate and define data fields. Field delimiters designate the information contained in a field and field separators designate the end of one field and beginning of the next field. For example, addresses in a contact file may be set up as:
"Address", "City", "State", "Zip Code",
In this example, the quotation marks serve as the field delimiters, they designate the information contained in each field. The commas serve as the field separators, they designate the stop of one field and beginning of the next field (and at the end, the end of the last field). When saving some file formats, you are asked to designate the following:
• Field Delimiter: Character used to designate the start and end of the information contained in each field.
• Row Delimiter: Character indicating the end of the line or row in a table.
• Text Qualifier: Character used to designate the start and end of text.
4  Working with the Event Entry Tab

Use the Event Entry tab to add, modify, or delete events and categories. Here you can also select and sort data for inclusion in chronologies or charts. The Event Entry table includes the following columns by default:

- **Check box (✓)**: Select or clear check boxes to indicate whether to show or hide events in the chronology and charts. You can also right-click on the check box and select Show or Hide.
- **Linked file**: Indicates that the event has a linked file (i.e., document, image, audio, email, video, or URL).
- **Event name**: The name displayed for the event in the chronology and charts.
- **Start date**: The date the event began.
- **Recurring event**: 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). For detailed instruction on working with categories, see “Categorizing Events” on page 7.
- **Place**: The location where the event occurred. Type directly in the cell to enter a location. To create a paragraph break, click Ctrl+Enter, Shift+Enter, or Alt+Enter.
- **Notes**: The details of the event. Type directly in the cell to enter notes. To create a paragraph break, click Ctrl+Enter, Shift+Enter, or Alt+Enter.
- **Sources**: The sources for your information.

You can rename the Place, Notes, and Sources columns by right-clicking on the column name and typing a new name in the box provided. You can also create your own custom columns to display information by clicking the Edit menu and selecting Manage Custom Columns.

Managing Events

Use the Event Entry tab to add, modify, or delete events and categories. Here you can also select and sort data for inclusion in chronologies or charts.

**ENTERING EVENTS INTO TIMELINE**

To enter events into the Case Timeline Event Entry tab:

1. From the Event Entry tab, click the Add Event toolbar button (✓).
2. Type a name for the event in the Event Name column. To move to the next column, press Tab.
3. Type the date the event began and ended in the Start Date and End Date columns, or double click the cell and click the Calendar button to select the date. To have the event automatically display the current date, type today in the cell. For detailed information on working with dates in Case Timeline, see "Entering Event Dates" below.
   - To create a recurring event, double-click the Start Date cell and click the Calendar button. Check the box next to Recurring event and select options. Recurring events display with a ✓ next to them in the Recurring Event column. To remove a recurring event, double-click the button next to the event and click Remove Recurrence.
4. Optionally, type the time the event began and ended in the Start Time and End Time columns.
5. Optionally, select a category (for grouping) in the Category column.
6. Optionally, type the location where the event occurred in the Place column and type or copy/paste a note in the Notes column. To create a paragraph break, click Ctrl+Enter, Shift+Enter, or Alt+Enter. You can rename the Place, Notes, and Sources columns by right-clicking on the column name and typing a new name in the box provided.
7. Double-click in the Sources cell to add, edit, link, delete, and rearrange your sources.
8. To enter information into another event, press Enter. To add a new event, click the Add Event toolbar button (✓).

**Entering Event Dates**

Event dates can display in day, month, year or in month, day, year format. To modify how the date displays, click the Tools menu, select Options, and select a Date Display Format from the list on the General tab. Regardless of the format you select in Options; you can enter dates in a variety of ways. For example, you could enter the date of January 2, 1932, in the following ways:
Case Timeline requires a space between the day, month, and year. You can also use a date separator, as shown below:

<table>
<thead>
<tr>
<th>Date</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>/</td>
<td>02/01/32</td>
</tr>
<tr>
<td>-</td>
<td>02-01-32</td>
</tr>
<tr>
<td>.</td>
<td>02.01.32</td>
</tr>
<tr>
<td>'</td>
<td>Jan 2, 1932</td>
</tr>
</tbody>
</table>

If the last two digits of the year are 31 or less, you must enter a four-digit year to avoid ambiguity. You can also use the calendar to enter dates. To access the calendar, double-click a date field and click the Calendar button ( ). The calendar is not available for dates prior to October 1752.

EDITING AND DELETING EVENTS IN TIMELINE
To edit an event, click in the field in the Event Entry tab containing the information you want to change and type your changes. To delete an event, click in a field of the event you want to delete, then click the Delete Event toolbar button ( ).

Managing Custom Columns
Click the Edit menu and select Manage Custom Columns, to create, edit, delete, or rearrange custom columns. Key facts sent from Case Notebook to Case Timeline may contain custom properties. During the send to Case Timeline from Case Notebook operation, these custom properties are mapped to existing columns in Case Timeline or mapped to new custom columns. The custom columns are then added to the Manage Custom Columns list.

Creating Custom Columns
1. Click the Edit menu and select Manage Custom Columns.
2. Click New to create a new custom column.
3. Type the name for the column in the box provided.
4. Select a type from the list. Number fields can contain negative numbers (-45) and decimal points (0.01). Negative numbers are entered with the minus symbol and display as (45) for -45. Currency is displayed with a $ symbol.
5. Click OK.

Editing, Deleting, and Rearranging Custom Columns
Select a custom column from the list and click Edit to rename the column. Select a custom column from the list and click Delete to remove that custom column (and associated data). Rearrange custom columns by selecting them in the list and clicking Move Up or Move Down.

Categorizing Events
The category column in the Event Entry table displays the category assigned to each event (for grouping purposes).

- Click the arrow next to the cell to select an existing category to assign to that event.
- To create new categories, type directly in the cell in the column.
- Create, edit, and delete categories by clicking in the cell and selecting Edit Category Names or by clicking the Edit menu and selecting Category Names.
- To select all events in a specific category to show or hide in chronology or charts, click the Edit menu, point to select Select by Category, and select a category.
SAVING CATEGORIES TO A FILE
Save categories to a CSV, TAB, or Case Timeline Category file (CTG) to add them to a different timeline or share them with other users.

1. Select Edit Category Names or click the Edit menu and select Category Names.
2. Click Save and select a file type from the list provided. To save the file to open it in another timeline, select West Case Timeline Category File (*.ctg) from the list.

ADDING SAVED CATEGORIES TO A TIMELINE
To add saved categories to a timeline, complete the following:

1. Click the Edit menu and select Category Names.
2. Click Open.
3. Select the CTG file you want to open and click Open.
4. Click OK. The categories are listed in the Edit Category Names box.
5. Click OK.

Linking Files and Source Documents to Events
Link documents, images, audio files, emails, videos, and websites to an event to show additional information about the event. When you link a file to an event, a icon displays next to the event on the Event Entry tab and the file type icon displays next to the event on the Chart tab. You can also create a link to a source document to quickly access the document from the Event Entry tab, a chart, or the chronology.

ADDING, EDITING, DELETING, AND VIEWING LINKED FILES
1. From the Event Entry tab, select the event for which you want to add, edit, or delete a linked file.
2. Click the Insert menu, and select Link. Alternatively, right-click in a cell and select Linked Files.
3. Select to add, edit, remove, or view the linked file.

You can also view a linked file by pointing to the icon on the Event Entry tab or the file type icon on the Chart tab to display the nickname for the file. Click the nickname to display the file.

WORKING WITH LINKED SOURCE DOCUMENTS
Open, add, edit, delete, and rearrange linked source documents for an event. From the Event Entry tab, right-click the in the Sources column of the event for which you want to add a new link, edit an existing link, delete an existing link, or rearrange the links in the cell; then click Add or Edit Link. You can also double-click in the blank part of a Sources cell to open the Edit List - Sources window. Note that you can rename the Place, Notes, and Sources columns by right-clicking on the column name and typing a new name in the box provided.

Viewing a Linked Source Document
- From the Event Entry tab, click the link to the source document in the Sources column for an event with a linked source document. Clicking the blue underlined source title opens the document in its native format. Clicking the Case Notebook icon (for sources sent from Case Notebook) opens the document in Case Notebook.
- From a flag chart or bar chart, point to an event with a link to a source document until the information icon displays. Click the icon, then click the link to the source document.
- On the Chronology tab, click the link to the source document in the Sources column.

Searching for and Selecting Events
Use the Case Timeline Search/Select feature to select subsets of events based on their date and/or content.

SEARCHING BY CONTENT
Select events based on their content by performing a simple text search.

1. Click the Edit menu and select Search/Select.
2. From the Simple tab, select a column from the list to search just that column or select Anywhere to search all columns.
3. Type your search term, e.g., performance, in the box.
4. Click Select. Events matching the search criteria are selected on the Event Entry tab.
SEARCHING BY DATE AND TIME
Select events based on a date and time by performing a date & time search.

1. Click the Edit menu and select Search/Select.
2. From the Date & Time tab, select an option from the list.
3. Type the date in the Start Date and End Date boxes, or click the Calendar button () to select the date.
4. Optionally, type a time in the Start Time and/or End Time boxes.
5. Click Select. Events matching the search criteria are selected on the Event Entry tab.

SEARCHING BY CONTENT AND A DATE AND TIME
Select events based on their content and a date and time by performing an advanced search.

1. Click the Edit menu and select Search/Select.
2. From the Advanced tab, type your search terms in the boxes for the columns you want to search.
3. Select a time option from the list.
4. Type the date in the Start Date and End Date boxes, or click the Calendar button () to select the date.
5. Optionally, type a time in the Start Time and/or End Time boxes.
6. Optionally, click More to access further search options.
7. Click Select. Events matching the search criteria are selected on the Event Entry tab.
Create a bar chart or flag chart to display the data in your timeline file in a graphical format. Flag charts display each event included in the chart placed in boxes connected by arrows to the time scale.

Bar charts display each event included in the chart assigned to 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.
From a flag chart or bar chart, point to an event until the information icon (i) displays. Click the icon to view event information. You can choose the information to display by clicking the Tools menu, selecting Options, clicking the Chart tab, and clicking the Customize button. Select to display or hide the event info using the Event Info check box.

Creating Charts

1. From the Event Entry tab, select or clear check boxes to indicate whether to show or hide events in the chart.
2. Click the Create New Bar Chart toolbar button ( ) or the Create New Flag Chart toolbar button ( ).
3. Select the options for your chart.
4. Optionally set the selected options for all charts you create of this type using the Set as Default check box, and click OK. To change the default options for charts, click the Tools menu, select Options, click the Chart tab, and select the default chart options.
5. A thumbnail of the chart displays in the Chart List in the left frame and the chart is displayed in the Chart tab.

ARRANGING EVENTS ON A FLAG CHART

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

You can display and customize connectors (the arrows that connect events to their dates on the time scale) in flag charts. Click the Format menu and select Connectors.

ARRANGING EVENTS ON A BAR CHART

Click the Auto Arrange Events toolbar button ( ) and select an option to arrange events in the chart.

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

Choose to hide or show gridlines in bar charts (to assist in determining event dates). Click the Format menu and select Gridlines.

Customizing Charts

Customize chart elements by:

- Clicking the Format menu and selecting the element you want to customize.
- Double-clicking an element in the chart.
- Right-clicking an element in the chart and selecting Format.
- Clicking the Tools menu, selecting Options, and setting options on the Chart tab will set the default Chart settings for all new charts.

Depending on the chart element, you have the following options:

- **Content**: Includes text, font style, and alignment.
- **Shape**: Includes up to eight different shapes, depending on selected chart element; a three-dimensional (3D) option is available for the square/rectangle shape.
- **Outline**: Includes styles for line shape, color, and thickness.
- **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.
- **Shadow**: Includes nine shadow effects.

DISPLAYING A BORDER

Choose to hide or show a border around your chart. Click the Format menu and select Border.

CUSTOMIZING THE BACKGROUND

Chart backgrounds can have a one-color, two-color (gradient), or graphic fill (watermark). To customize the chart background, click the Format menu and select Background. If using a default graphic fill tile, it is recommended you select Tile from the Position list for best results.
Add a logo as a watermark to your chart:

1. Click the Format menu and select Background.
2. Choose Graphic Fill from the Fill Type list.
3. Browse for and select the logo.
4. Choose Center from the Position list.
5. Select the Watermark check box and click OK. The logo displays in the chart as a watermark.

INSERTING IMAGES INTO A CHART
Case Timeline includes a number of clip art images you can insert into your charts. You can also add images in BMP, JPG, PNG, GIF, or TIF format to your charts. Click the Insert menu, point to Picture, and select an option. Resize an inserted picture by selecting it and dragging it in or out to resize. Position the image in the chart by dragging it to the desired location. Format an inserted picture by adding an outline or shadow, changing the shape, or making it a watermark. To format a picture, select the picture in the chart, click the Format menu, and select Picture.

ADDING ANNOTATIONS TO A CHART
Insert additional notes on your chart in an annotation. Click the Insert menu and select Annotation to add and format an annotation. You can customize the annotation by adding a shape, outline, fill, and shadow. Resize an inserted annotation by selecting it and dragging it in or out to resize. Position the annotation in the chart by dragging it to the desired location.

INSERTING IMAGES INTO CHART EVENTS
Add an image to an event in a flag chart or bar chart.

1. Right-click the event in the chart to which you want to add an image and select Format Event.
2. Click the Image tab.
3. Select the Show Image check box to display the image in the event.
4. Click Browse to browse for a select an image.
5. Set size, alignment, and border options and click OK. The image displays next to the event name.

CUSTOMIZING THE TITLE AND TITLE BAR
Customize the title name and style as well as the shape, outline, fill, and shadow of the title bar. To change the title and the title bar, double-click the title bar or click the Format menu and select Title. make the desired changes, and click OK. To insert the current day's date in the title, type @today in the box next to the title. Resize a title bar by selecting it and dragging it in or out to resize. Position the title bar at the top of in the chart by dragging it to the desired location.

CUSTOMIZING THE FOOTER AND FOOTER BAR
Customize the footer name and style, add an image or watermark to the footer, and customize the shape, outline, fill, and shadow of the footer bar. To change the footer and the footer bar, double-click the footer bar or click the Format menu and select Footer, make the desired changes, and click OK. To insert the current day's date in the footer, type @today in the box next to the title. Resize a footer bar by selecting it and dragging it in or out to resize. Position the footer bar at the bottom of in the chart by dragging it to the desired location. Delete a footer by clicking the Format menu, selecting Footer, and deleting the text in the Content box.

CUSTOMIZING THE LEGEND
A legend explains the relationship between a category and the event color in the chart. Customize legend style as well as the shape, outline, fill, and shadow of the legend. To customize the legend, double-click the legend or click the Format menu and select Legend, make the desired changes, and click OK. To hide the legend display, click the Format menu, select Legend, and clear the Show Legend check box. Resize the legend by selecting it and dragging it in or out to resize. Position the legend in the chart by dragging it to the desired location.
CUSTOMIZING THE TIME SCALE

The time scale is the tick line that runs across the chart. The labels on the time scale 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.

- **Expand and compress the time scale**: Increase or decrease the time scale on your chart. The smaller the time increments you choose, the more horizontal space your chart will require. To expand or compress the time scale, click the **Expand Time Scale** toolbar button ( ) or **Compress Time Scale** toolbar button ( ) or use the **Time Scale** menu options. Repeat as necessary. Each time you expand or compress the time scale, your chart becomes a quarter page wider or narrower. To limit the change to an eighth of a page, press and hold the Shift key as you expand or compress the time scale. 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, click the **File** menu, select **Page Setup**, select **Portrait**, and click **OK**.

- **Manually set a date range or set the time increments**: Click the **Time Scale** menu, select **Date Range**, and select your options from the **Date Range** and **Time Increments** tabs. Events that do not occur within a manually defined date range do not display on the chart and their check boxes are shaded on the **Event Entry** tab. When a manual date range is used, a lock icon displays next to the date on the status bar at the bottom of the window. To change the default time increment, click the **Tools** menu, select **Options**, and select a time increment from the **Time Increment Display** list.

- **Insert a break in the time scale**: Insert a break in the time scale 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 move the pointer over the time scale, time spans for logical breaks display. To insert a break, right-click the time scale where you want to insert the break and select **Insert Break**. To remove the break, right-click the break and select **Delete Break**.

- **Customize the format of the time scale**: Customize the style as well as the shape, outline, fill, and shadow of the time scale. To customize the time scale, double-click the time scale, right-click the time scale, or select the element you want to customize by:
  - Clicking the **Format** menu and selecting **Time Scale**, make the desired changes, and click **OK**.

CHANGING THE DATE FORMAT OR TIME INCREMENTS

Change the date format or time increments by clicking the **Tools** menu, selecting **Options**, and setting the display options.

RESIZING FLAGS IN A FLAG CHART

Select a flag in the chart 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.

Working with Chart Themes

Case Timeline includes several professionally designed themes 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. To work with themes, click the **View** menu and select **Theme List** to view the list of themes in the lower left corner of the window.

- **Apply a theme**: Select a theme from the Theme List and click **Apply**. All of the elements in the chart are modified with the default styles of the theme.
- **Import a theme**: Select a theme from the Theme List and click **Import**.
- **Create and save a custom theme**: Select a theme from the Theme List, customize chart elements by:
  - Clicking the **Format** menu and selecting the element you want to customize.
  - Double-clicking an element in the chart.
  - Right-clicking an element in the chart and selecting **Format**.
  - Using the Style Selector (see the following section "Working with the Style Selector").

Click **Save** in the Theme List. To delete a custom theme, select it in the Theme List and click **Delete**. Note, you cannot delete the predefined themes included with Case Timeline.
• **Change the default theme:** Click the **Tools** menu, select **Options**, click the **Chart** tab, and select a different theme from the **Default Theme** list.

**WORKING WITH THE STYLE SELECTION**

To work with the Style Selector, click the **View** menu and select **Style Selector** to view a sample of every style in the selected theme. A T under a style indicates it belongs to a saved theme.

<table>
<thead>
<tr>
<th>Style Selector</th>
<th>Event</th>
<th>Picture</th>
<th>Annotation</th>
<th>Time Scale</th>
<th>Legend</th>
<th>Title</th>
<th>Footer</th>
<th>Background</th>
</tr>
</thead>
<tbody>
<tr>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
<td>(10 pt)</td>
</tr>
</tbody>
</table>

**Applying a Style**

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

**Modifying a Style**

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 select **Edit Style**.
4. Make the desired changes and click **OK**.

**Deleting a Style**

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 select **Delete Style**. The style is deleted and any chart elements using this style revert to the default style.

**Changing the Default Style**

You can only change the default style for pictures and annotations.

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 select **Make Default Style**.

**Modifying Theme Colors**

You can modify theme colors or apply custom colors. For example, to modify the head fill color for an event in a flag chart:

1. Right-click the color you want to modify on the **Event** tab in the Style Selector and select **Edit Style**.
2. Click the **Head Fill** tab.
3. Select a **Fill Type** from the list (**One Color** or **Two Color**).
4. Click the color button.
5. Click **Add Custom Colors** to display the color palette.
6. Make your desired changes and click **OK**.
Customizing the Chronology Report

Use the Chronology tab to view a formatted text report of the events in the timeline. You can select events and columns to include, change the column order in the chronology, and display only events occurring within a defined date range. Customize the Chronology report by:

- **Selecting Events to Display in the Report**: From the Event Entry tab, select or clear check boxes to indicate whether to show or hide events in the chronology. You can also right-click on the check box and select Show or Hide.

- **Selecting Columns to Display in the Report**: The chronology can include any or all of the columns available on the Event Entry tab. By default, all columns are included in the chronology. To add or remove a column from the Chronology report, click the View menu, point to Chronology, and select the desired columns to include in the report. You can also right-click in the Chronology, point to Columns and select the columns to include in the report.

- **Changing the Order of Columns in the Report**: The column order on the Chronology report reflects the column order on the Event Entry tab. From the Event Entry tab, drag each column heading to the desired position to change the column order.

- **Selecting to Only Display Events in the Report that Occur within a Defined Date Range**: To set the date range, click the Time Scale menu, and select Date Range. Select Manual, then type the date and time ranges in the appropriate boxes and click OK.

Printing and Publishing a Chronology

Send a chronology to a printer or print a chronology to a file.

1. Click the Chronology tab.
2. Click the Print toolbar button ( ).

To publish or save a chronology to PDF, HTML, or graphic file format, click the File menu, point to Publish, and select an option.
Create your own presentation slides for your charts and view presentations from Case Timeline. Each time you create a new bar or flag chart, it is displayed in the Chart List. Case Timeline uses these charts to create your presentation.

Creating a Presentation

- **Arrange the chart sequence**: Arrange the charts in the Chart List to select the order in which they display in a presentation. To change the order of a chart, drag the charts to the desired position.
- **Remove a chart from the presentation**: Right-click on a chart in the Chart List and clear the Show in Presentation 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 select Show in Presentation.
- **Duplicate a chart in the presentation**: Right-click on a chart and in the Chart List and select Duplicate. A sequence number displays next to a chart in the Chart List to indicate that it is included in the presentation and the order in which it displays in the presentation.
- **Customize the presentation**: Right-click a chart in the Chart List, point to Presentation Options, and select an option. Only the selected chart’s presentation options are modified. To modify the default settings for all presentations, click the Tools menu, select Options, and set the options on the Presentation tab.
  - **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.

Viewing a Presentation

Click the Chart menu and select Presentation or click the View Presentation toolbar button ( ). The presentation displays in a slide show. To move through the presentation, use the arrow keys on your keyboard or the toolbar at the bottom of the slide. Click the down arrow on the toolbar at the bottom of the slide for presentation options. To return to Case Timeline, press Esc.

Inserting Timeline Charts into Microsoft PowerPoint

Insert timeline charts into Microsoft PowerPoint. A PowerPoint slide is created for each chart and inserted after the slide that is currently selected in the PowerPoint slide list. When you update a chart in Case Timeline, it is also automatically updated in PowerPoint.

As with the Case Timeline presentation mode, you can set presentation options for viewing the timeline in PowerPoint. For the presentation options to work with PowerPoint, Case Timeline or the 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 display as static images. If needed, you can download the Case Timeline Viewer for free at [http://info.legalsolutions.thomsonreuters.com/software/timeline/viewer/](http://info.legalsolutions.thomsonreuters.com/software/timeline/viewer/)

If you are transferring your files to another computer for the PowerPoint presentation, place all the files (Case Timeline, PowerPoint, images, and linked files) together in the same location (e.g., the My Timelines folder within the My Documents folder) so Case Timeline can find them.

If you are using PowerPoint 2007 or later, the options for Case Timeline are displayed on the Add-Ins tab.
8 Printing Timelines

Print timelines or use the Print Preview feature to customize your charts before printing.

Working with Print Preview

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.

1. Click the Chart tab and then click the chart you want to print in the Chart List.
2. Click the Print Preview toolbar button ( ).
3. Set your printing options and click Print. You can expand 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. Note that although the timeline may seem distorted in Print Preview, it prints correctly.

Printing a Timeline

Select a chart from the Chart List that you want to print, click the Chart or Chronology tab to print the information on that tab, and click the Print toolbar button ( ).

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.
9 Sharing Timelines

In addition to printing timelines (see “Printing Timelines” on page 17 for more information) and creating timeline presentations (see “Creating and Viewing Presentations” on page 16 for more information), Case Timeline provides a number of options to share your timelines with other users. You can:

- Publish your timelines to PDF, HTML, or graphic (JPG, GIF, TIF, BMP, PNG) format for sharing.
- Copy an entire chart or part of a chart and paste it into other applications using Copy Chart to Clipboard.
- Share your timeline files with another computer or person using Package for Sharing which packages the timeline file with all its attachments, such as images and linked documents, and places them in a compressed, or zipped (.tlmz), file.
- Email your charts or view them in PDF using Send To.

Saving and Publishing Timelines
Publish your timelines to PDF, HTML, or graphic (JPG, GIF, TIF, BMP, PNG) format for sharing. Note, the chronology can only be published as an HTML Document (see “Customizing the Chronology Report” on page 15 for more information).

1. Select a chart from the Chart List that you want to publish, click the Chart or Chronology tab to publish the information on that tab.
2. Click the Publish Chart toolbar button ( ).
3. Select a file format from the Save as type list. Publishing files to HTML creates two files - HTML and JPG. These files must remain in a common directory in order to view the timeline.
4. Type a name for the timeline and click Save.

Copying and Pasting Charts
Copy an entire chart or part of a chart and paste it into other applications.

1. Select a chart from the Chart List that you want to copy, click the Chart tab to copy information on that tab.
2. Click the Edit menu, point to Copy Chart to Clipboard, then select Entire Chart to copy the entire chart or select Chart Shown to copy only the section of the chart that is displayed in the Chart tab.
3. Open another application (e.g., Microsoft PowerPoint) and paste the chart you have copied.

Working with Package Files
Share your timeline files with another computer or person using Package for Sharing which packages the timeline file with all its attachments, such as images and linked documents, and places them in a compressed, or zipped (.tlmz), file.

1. Click the File menu and select Package for Sharing.
2. Type a name for the .tlmz file and click Save.

OPENING A PACKAGED FILE

1. Click the File menu and select Open.
2. Browse for and select the .tlmz file and click Open.

Using Send To to Email or View Charts in PDF
Email your charts or view them in PDF using Send To.

1. Select a chart from the Chart List that you want to email or send to PDF, click the Chart tab to send the information on that tab.
2. Click the File menu, point to Send To, and select an option.
   - Selecting Mail Recipient will open your default email program with a JPEG image of your chart attached to a new blank message.
   - Selecting PDF Viewer will open a temporary PDF file in your PDF viewer. To save the PDF, click Save in your viewer.