Sharing a project using SmartWorks Project Planner

In large and medium size enterprises, it often becomes imperative to be able to share a project with team members, customers, Management etc.

A common and most popular way of offline method of sharing project data since ages, is by **taking paper prints** of the project plan and/or GANTT view of the project and thereby making the team members aware of the schedule. This method of sharing the project data may not help while presenting a project to customers, or while sharing the data with customers across offices.

SmartWorks Project Planner provides a number of ways by which a project can be shared and distributed across an enterprise environment as well as on a personal system used by individuals. Following are the methods by which a project data can be shared **offline** using SmartWorks Project Planner.

- ➤ Exporting/importing the project plan to/from SmartWorks Project Planner Reader files
- ➤ Exporting/Importing project plan to/from MS-Excel ™ files
- ➤ Exporting/importing the project plan to/from XML format
- ➤ Importing the project plan from MS-Project ™ (MPP) files
- ➤ Exporting the plan to HTML format files

Exporting/importing the project plan to Project Planner Reader (.PPR)

User(s) of SmartWorks Project Planner can share their project data with others who may or may not be the users of SmartWorks Project Planner.

Project Planner provides an option to export a plan completely to Project Planner reader format. (.ppr files). The exported file can be sent across by e-mails, thereby sharing the project data.

The person with whom the project data needs to be shared, may or may not be a user of SmartWorks Project Planner. If (s)he uses Project Planner, (s)he can import this file and then the plan can be viewed and modified.

If the person with whom the project data needs to be shared is not a user of Project Planner then the plan can be viewed using the Project Planner reader, which is absolutely **free** and can be downloaded from http://www.smartworks.us/demo/ppreader10.exe.

SmartWorks Project Planner reader allows the user to read the project plans prepared using SmartWorks Project Planner. The user gets to see all the aspects of the project plan including GANTT charts, Network Diagrams and the project cost and other graphs. However the user **cannot** modify the project plan or print it.

Additionally, the user can export only selected views to the reader. For additional security, a file can be exported and it can be password protected.

This feature is available in all editions of SmartWorks Project Planner.

Exporting/Importing project plan to MS-Excel ™

Sharing a project plan using MS-Excel becomes important, when the user wants to share the plan for modification and his/her partner does not use SmartWorks Project Planner, but uses some other software, which supports MS-Excel format. In such a situation, the user can export the project plan to Excel file and send it across.

Using this option, the plan prepared in SmartWorks Project Planner can be shared with others by exporting the plan to MS-Excel. Components present in the plan view only, can be exported to Excel.

Similarly, if the user needs to modify a plan sent by his/her customer in Excel format, SmartWorks Project Planner gives an option to import the project plan from Excel file.

Hence a plan, which is present in MS-Excel (exported either from SmartWorks Project Planner or any other project planning software), can be imported to SmartWorks Project Planner.

This feature is available in all editions of SmartWorks Project Planner.

Exporting/importing the project plan to XML format

Using this option, a project plan can be exported to XML format. XML is a simple and very flexible text format and hence the project plan can be read and tagged by users. Similarly a project saved in XML format can be imported in SmartWorks Project Planner.

Importing the project plan from MPP file

This feature present in SmartWorks Project Planner becomes very important, when someone shares their project data in .mpp file format. SmartWorks Project Planner can read and understand MS-Project ^{TM} (.mpp) files. Using this feature, an MS-Project file can be read and the plan can be loaded in SmartWorks Project Planner.

Exporting the plan to HTML format files

Project plans can also be shared by saving the plan details in HTML format. SmartWorks Project Planner saves the project details, summary of the project, risks occured, plan and resources for a project, in HTML format. User can optionally select the views, which (s)he wants to export to HTML format.

Viewing the plan becomes very easy as HTML format can be viewed using any available web browser.

Connecting to centralized server

Project data can be shared **online** using SmartWorks Project Planner by connecting to SmartWorks server. This feature is available only in multiuser edition of SmartWorks Project Planner.

Project Planner multiuser edition has a SmartWorks Server component.() A Project is stored on the centralized SmartWorks Server. Project Planner clients connect to the server and login to the projects to begin with. Manager of the project can give access to all the team members of his project.
Project Planner gives hierarchical user structure. Project manager can restrict the access to users with different types in Project Planner.ex: Read only access,access to modify the task status etc.

Advantages of having multiuser edition of SmartWorks Project Planner:

- ➢ Can easily share the project Plan amongst team members.
- ➢ Team members can actually login and update the status of their respective tasks in real time and hence can follow the project plan strictly.
- ➢ Project manager can restrict the users to access certain views of project plan hence maintaining the confidentiality
- ➢ Manager can closely watch the progress of the plan and can monitor the health of the project depending on the current status of the plan
- ➢ All off-line plan sharing techniques are also available

S No.	Features	Project Planner – PE	Multi user Edition
1	Online data sharing	NO	YES
2.	Offline data sharing	YES	YES

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