



SharedPlan  
SOFTWARE

# SharedPlan X User Guide

# SharedPlan X User Guide

## 1 Introduction

- 1.1 Welcome to SharedPlan X 4
- 1.2 What to Expect From This User Guide 5

## 2 Important Concepts

- 2.1 The SharedPlan Approach To Planning 7

## 3 Creating Your First Project

- 3.1 The New Project Assistant 9

## 4 Using the Gantt Chart Editor

- 4.1 What Is A Gantt Chart And Why Should I Care? 12
- 4.2 Starting To Use The Gantt Chart Editor 13

## 5 Project Calendar

- 5.1 Project Calendar Basics 16

## 6 Reporting

- 6.1 Project Information Through Reports 18

## 7 Preferences

- 7.1 Configuration Options 21

## 8 Additional Information

- 8.1 Where To Find Additional Information 23



# Introduction



## **Welcome to SharedPlan X**

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You are now one step ahead of most of the rest of the population since the majority of projects are planned on cocktail napkins or in spreadsheets. Sometimes, cocktail napkins and spreadsheets are a good place to start but if the project is important to you it deserves more understanding of the task and relationships. SharedPlan X will help you define the tasks and relationships in your project and most importantly modify them as the realities of the project become apparent.



## What to Expect From This User Guide

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This user guide is intended to introduce you to the features and functions of SharedPlan X.

We can't hope to describe all the ins and outs of planning and managing a project in this document so we'll focus on the tool. There are a bazillion and one resources on the web that can do everything from introduce you to project planning and management to improving your masterful skills.

As with most things, the best way to learn is by doing - so as you read through this document think about how the features and functions of SharedPlan X can help you tackle the planning and management of the projects that are important to you. If you encounter a piece of this document that is not clear you might want to pop open SharedPlan X and play with the program as you explore the document.



# Important Concepts



## The SharedPlan Approach To Planning

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The SharedPlan tools are dedicated to an approach to planning that will reliably improve project success. That approach is to support you in creating and maintaining a sufficiently detailed plan and then broadly communicating that plan.

What do we mean by sufficiently detailed? Well, how many plans have you seen produced that dive into the deepest level of detail, a level of detail that is impossible to maintain throughout the life of the project, a level of detail that hides the real issues in the project. A sufficiently detailed plan has enough information so that the people participating in the project know who needs to be doing what and when as well as project dependencies between the tasks.

What do we mean by broadly communicating the plan? A bad plan that is broadly communicated is better than a great plan that is not circulated to the project team. The reason being that a bad plan that is broadly communicated will probably get fixed since no one on the project team wants to invest their time, energy, and capital in a plan that is doomed from the start. And, quite often, the people participating in a project may have insights that the person developing the plan lacks.

So, keep the plan as simple as possible, and communicate it to the people involved (participants and sponsors) as soon and as often as possible. You might be surprised how adhering to these two steps will improve the probability of project success.



# Creating Your First Project

## The New Project Assistant

### Using the New Project Assistant

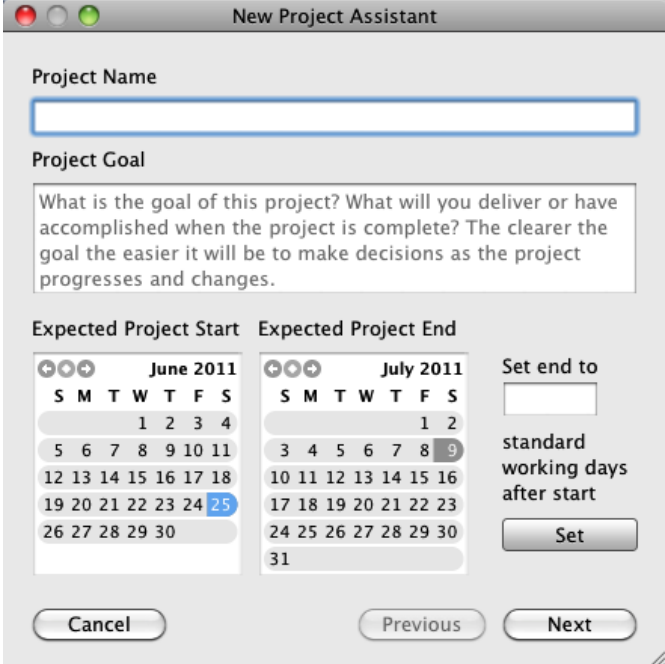
SharedPlan X provides you with an easy way to create a new project: the new project assistant. To access the new project assistant, select File -> New Project Assistant from the menus.

Set the project name to whatever makes sense to you. the project name should be short and descriptive.

Setting the project goal is one of the most important steps to a successful project. The goal should support you in decision making as the project progresses and provide you and those involved with the project information on the deliverables and benefits.

The project start and end dates are just what you think. You can also set the end date based on a duration rather than selecting a specific day.

Once you've entered this information click Next.



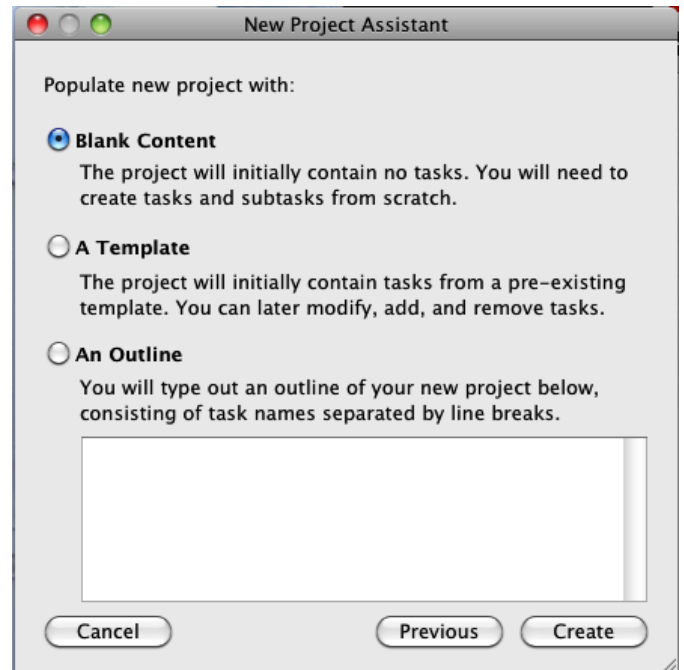
The screenshot shows the 'New Project Assistant' dialog box with the following fields and options:

- Project Name:** A text input field.
- Project Goal:** A text area with the prompt: "What is the goal of this project? What will you deliver or have accomplished when the project is complete? The clearer the goal the easier it will be to make decisions as the project progresses and changes."
- Expected Project Start:** A calendar for June 2011. The date 25 is selected.
- Expected Project End:** A calendar for July 2011. The date 9 is selected.
- Set end to:** A dropdown menu with the option "standard working days after start" selected.
- Buttons:** "Cancel", "Previous", "Next", and "Set".

## Deciding On New Project Content

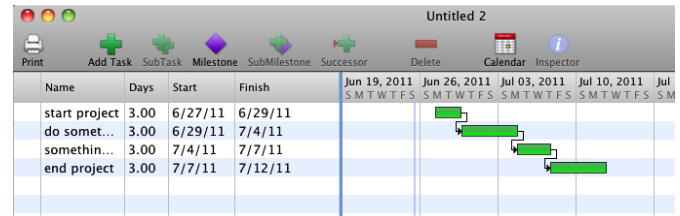
After clicking Next you'll see a window similar to that above. You have three choices for how you would like to initially load the project. You can start with a blank project, use a template, or take a first cut at entering the project tasks (you can always add more later).

For the case, click on An Outline and then in the box below and on separate lines, enter "start project", "do something", "something else", "end project". When you click Create each of those lines will be used to create a task with the same name.



## Your First Project!

After clicking on Create, a project similar to that shown above will be created. Note that the task duration is calculated by taking the project duration and dividing it by the number of tasks. You can change any of these values by clicking on the value that you would like to change.



## What's Next?

You now have a simple first project you can add tasks and modify their values as described later in this document.



# Using the Gantt Chart Editor

## What Is A Gantt Chart And Why Should I Care?

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### **Mrs. Gantt's Son Henry Done Good**

You may have used Gantt Charts for years and if you have you can skip this section. If you haven't, read on.

Henry Gantt is credited with the creation of the Gantt Chart in 1912. As with most inventions there is some controversy around whether he actually created the chart or just widely published his efforts first.

### **What Is A Gantt Chart**

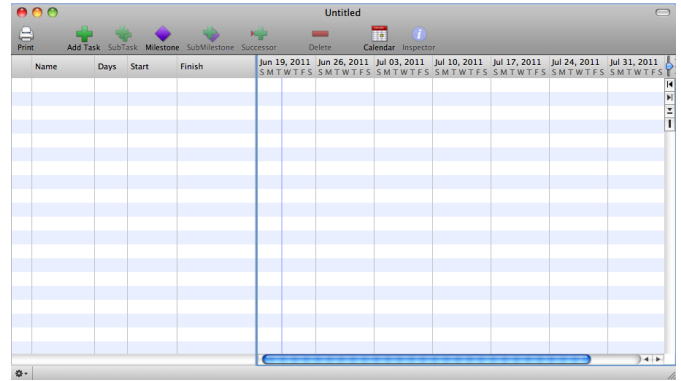
A Gantt chart is essentially a large table allowing you to create named tasks in each row and establish the task duration as well as dependencies. Dependencies allow you to order tasks in a project. An example of a dependency is that as Mom always said you must brush your teeth before going to bed so, going to bed is dependent on having brushed your teeth.

Gantt Charts are an excellent tool for visualizing the timeline of a project as well as the dependencies between the project tasks.

## Starting To Use The Gantt Chart Editor

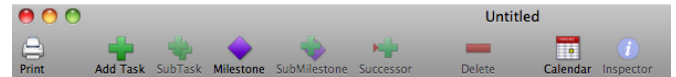
### Start SharedPlan X On Your Mac

As with all Mac apps, double click on the SharedPlan X program and you will be immediately rewarded with a window on your Mac that looks similar to the one shown above.



### What's In The Toolbar

You can probably guess what most of the icons will do for you but the list below describes each anyway.

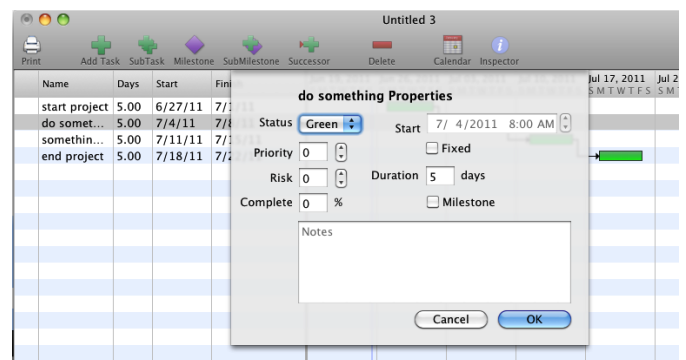


- **Print:** print causes your blender to mix up a fine Margarita and summon you when it's ready. Kidding of course...clicking on Print allows you to print the project to a printer or PDF.
- **Add Task:** clicking on Add Task causes a new task row to be added to your project.
- **SubTask:** clicking on SubTask causes the selected task to be converted into a summary task and a new task created within. Sub tasks are a great way to decompose complex tasks in manageable chunks of work.
- **Milestone:** this is really where the Margarita comes into play. A Milestone task is a point in the project where a important deliverable is completed. Marking a task as a milestone is useful when you want to highlight an important event in the project.

- **SubMilestone:** as with SubTask, clicking on SubMilestone will cause a lower level task to be created beneath the currently selected task and it will be represented as a milestone.
- **Successor:** when you have a task selected this icon will be activated and when clicked on a new task and dependency is created after the currently selected task.
- **Delete:** just what you would expect...select a task and click on the task and the task is removed from your project.
- **Calendar:** each project has a calendar that allows you to specify which days are work days and how long the work day is on any given day. You'll find more info on the project calendar later in this document.
- **Inspector:** selecting a task and clicking on Inspector allows you to modify the attributes associated with a task. More info on this is below.

## Changing Task Properties

There are two ways to modify task attributes. You can either click on the value (Name, Days, Start,...) and change it directly in Gantt editor or you can select the task that you would like to change and click on Inspector in the Toolbar. When you click on Inspector a window similar to that shown above will be displayed.





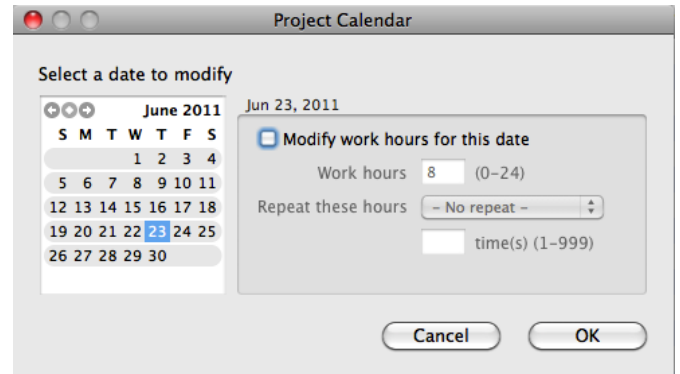
# Project Calendar

## Project Calendar Basics

### Project Calendar Editor

Each project has one calendar allowing you to set the days on which project work will be accomplished as well as the working hours on a given day.

The Project Calendar Editor is accessed by either clicking on the Calendar icon in the toolbar or selecting Window -> Project Calendar from the menus.



### Manipulating the Project Calendar

To modify the Project Calendar you first select the day you would like to change and then make the appropriate modification to the work hours. You may also set the change as recurring as needed.

By default, the Project Calendar is set for Monday-Friday as work days of 8 hours each.



# Reporting

## Project Information Through Reports

### Types of Reports

SharedPlan X provides you with 3 reports: a project report, a tasks report, and a report of the tasks with a red status.

Each report is presented in a separate window. In the upper left corner of each window are two icons: To Browser and Print. The Print icon does what you would expect and clicking on the To Browser icon presents the report in your default browser (Safari, Firefox, Chrome, ...) where you can repurpose the report as appropriate.

### Project Summary Report

The project report provides you with an overview of the project dates, duration, and work as well as a summary of the project tasks and their progress.



The screenshot shows a window titled "Project Report for" with "To Browser" and "Print" icons. The report content is as follows:

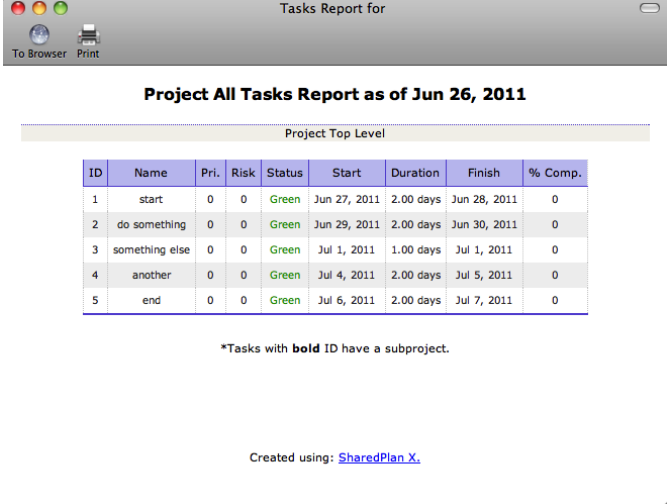
Planned	
Dates	Start: Jun 27, 2011 Finish: Jul 7, 2011
Duration	10.33 days
Work	9.00 days

Task Status	
Started:	5
Not started:	0
Finished:	0
Late:	0
<b>Total Tasks: 5</b>	

## Project Task Report

The project task report provides you with information on the properties of each task in the project.



**Project All Tasks Report as of Jun 26, 2011**

Project Top Level

ID	Name	Pri.	Risk	Status	Start	Duration	Finish	% Comp.
1	start	0	0	Green	Jun 27, 2011	2.00 days	Jun 28, 2011	0
2	do something	0	0	Green	Jun 29, 2011	2.00 days	Jun 30, 2011	0
3	something else	0	0	Green	Jul 1, 2011	1.00 days	Jul 1, 2011	0
4	another	0	0	Green	Jul 4, 2011	2.00 days	Jul 5, 2011	0
5	end	0	0	Green	Jul 6, 2011	2.00 days	Jul 7, 2011	0

\*Tasks with **bold** ID have a subproject.

Created using: [SharedPlan X](#).

## Project Red Tasks Report

The red tasks report shows you which task are in danger of not being completed as expected. Task status is managed through the Task Inspector and values may be red, yellow, and green.



**Project Red Status Tasks Report as of Jun 26, 2011**

Project Top Level

ID	Task Name	Risk Level	Priority	Status	Start	Duration	Finish	% Complete
2	do something	0	0	Red	Jun 29, 2011	2.00 days	Jun 30, 2011	0

\*Tasks with **bold** ID have a subproject.

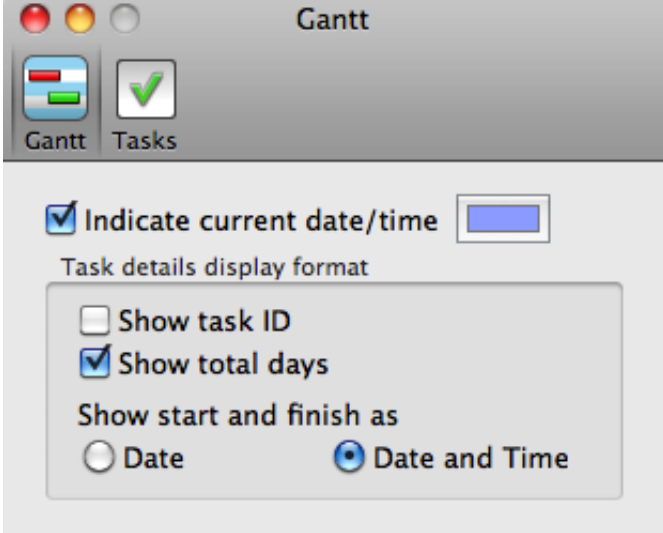
Created using: [SharedPlan X](#).



# Preferences

## Configuration Options

### Gantt Preferences



**Gantt**

Indicate current date/time

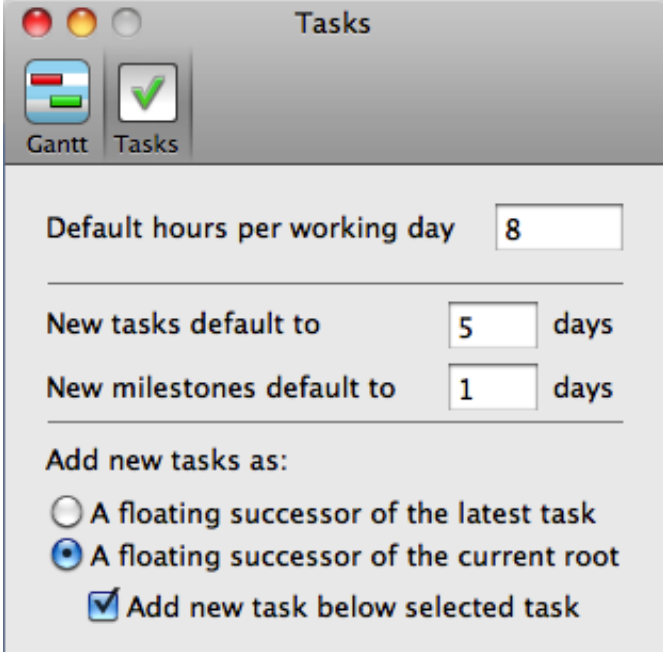
Task details display format

- Show task ID
- Show total days

Show start and finish as

- Date
- Date and Time

### Task Preferences



**Tasks**

Default hours per working day

New tasks default to  days

New milestones default to  days

Add new tasks as:

- A floating successor of the latest task
- A floating successor of the current root
- Add new task below selected task



# **Additional Information**



## Where To Find Additional Information

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For additional information beyond what is included in this document please note that there are other product documents as well as other support options.

All of our documentation is available at:

[http://www.sharedplan.com/product\\_documentation.html](http://www.sharedplan.com/product_documentation.html)

Additional support options are available at: <http://www.sharedplan.com/support.html>

We welcome and appreciate any feedback you might have on this document, or our product family. Please send your feedback and suggestions to [feedback@sharedplan.com](mailto:feedback@sharedplan.com).

Thank you and please let us know how we're doing.