

Swiftlight®
Project Management Software

The Easy, Visual, Planning and Communication Tool
See the way ahead...

Swiftlight – MS Project Converter User Guide

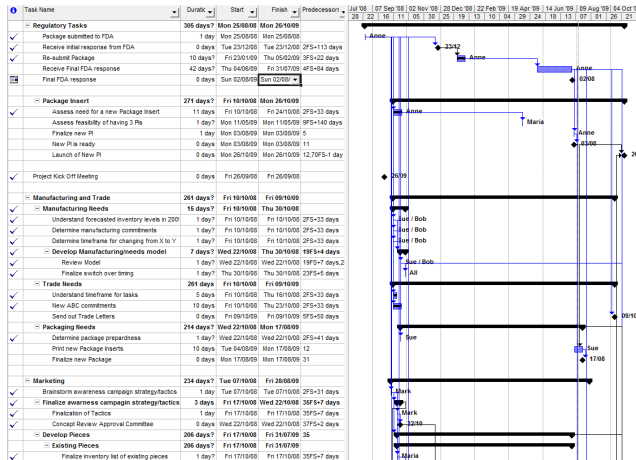
- 1) *Introduction;*
- 2) *Importing MS Project files into Swiftlight;*
- 3) *Exporting Swiftlight files into MS Project.*

Introduction

The Swiftlight – MS Project Converter helps you do two things:

- 1) Quickly convert a MS Project file into Swiftlight, offering easier and clearer visualization and communication of project timelines, project progress (e.g. activity percent complete and status (red, amber, green)) and other project data.

From

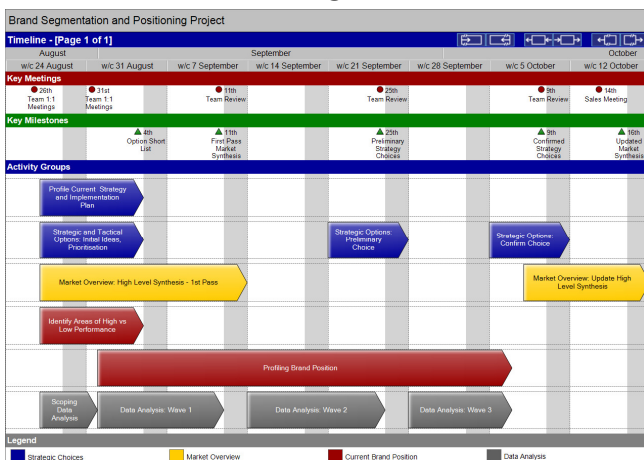


To



- 2) Take a plan in Swiftlight and convert it into a MS Project file, allowing you to plan at a high level in Swiftlight and then export to MS Project for more detailed planning.

From



To



The rest of this document will guide you through the simple steps that are needed to undertake these conversions – which in both cases is straightforward – and it will also provide some guidance on when this functionality is most helpful.

We hope that this information will be sufficient to get you going with the Swiftlight – MS Project Converter tool. However if you need any further support please do not hesitate to contact us at support@torridonsolutions.com – we are always happy to help you get the most out of our products.

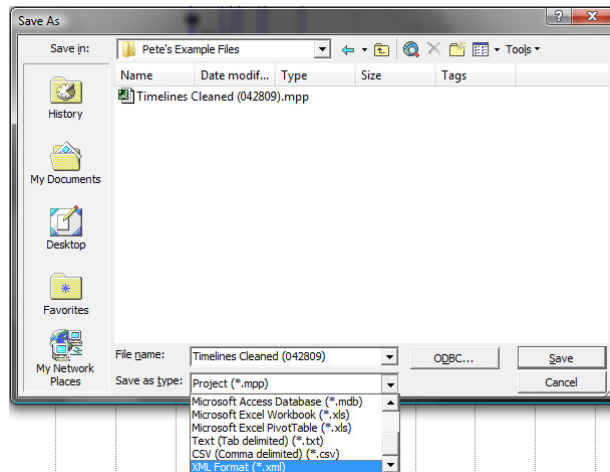
We hope you enjoy using Swiftlight!

The Swiftlight Team
Torridon Solutions.

Importing MS Project files into Swiftlight

STEP ONE: Save your MS Project file as an .xml file

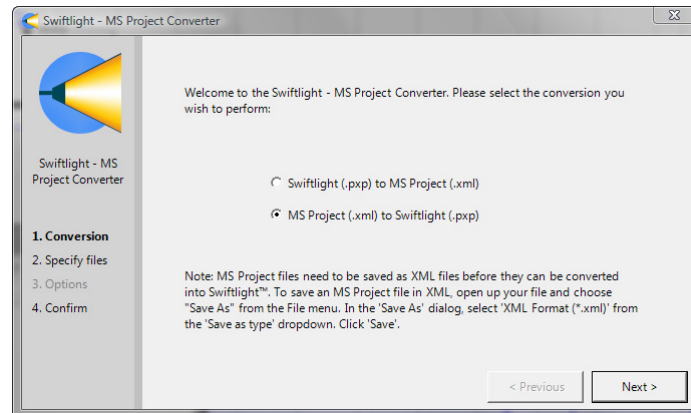
Before you can use the Swiftlight – MS Project Converter tool you need to get your MS Project file ready to import. This easy step must be completed within MS Project. In MS Project, open the file that you want to import to Swiftlight, and select “Save As” from the File menu.



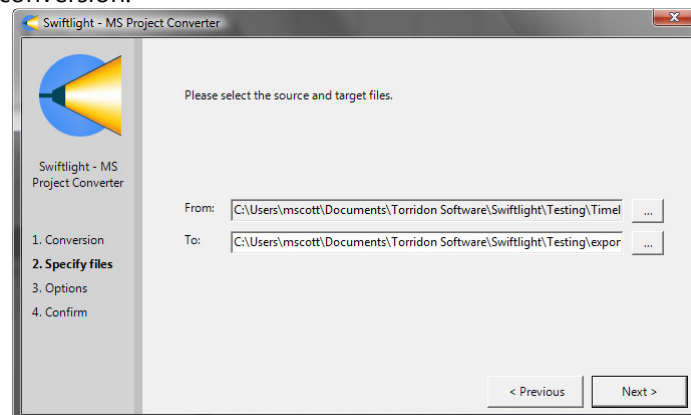
In the dialogue that appears, change the “Save as type” dropdown to “XML Format (*.xml)” and then press “Save”.

STEP TWO: Open the Swiftlight – MS Project Converter tool and select the file you wish to convert

To convert a MS Project file to Swiftlight you must select the second option in the opening screen of the Swiftlight – MS Project Converter tool.



Press “Next” to get to the screen to select the MS Project file you wish to convert and the name of the new Swiftlight file that you will create during the conversion.

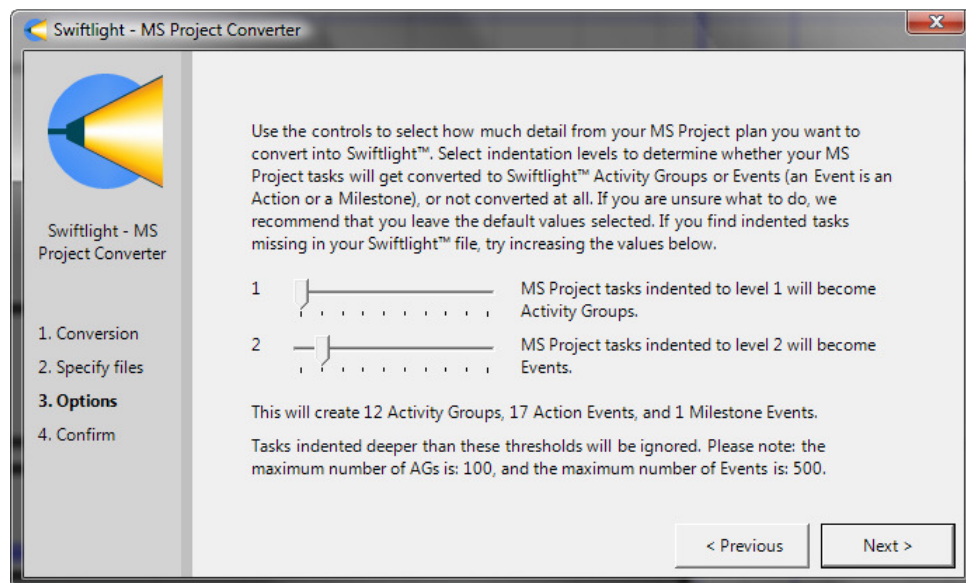


Use the buttons to the right of the “From:” and “To:” textboxes to browse to find the .xml file that you wish to convert to Swiftlight as well as the giving a name for the new Swiftlight file. Then press “Next”.

STEP THREE: Choose what content to include in the conversion

The Swiftlight – MS Project Converter tool allows you to choose the content to include in the conversion to Swiftlight. This choice is based on the level of indentation, or hierarchy, of the tasks within your original MS Project file.

The controls in the dialogue allow you to select which level(s) of indentation, or hierarchy, in MS Project will be converted to Activity Groups in Swiftlight (represented by arrows on the Timeline view) and which level(s) of indentation to include as Milestones or Actions beneath the Activity Groups.



Using an example is the best way to understand the effect of these controls on the output within the new Swiftlight file.

50	✓	[-] Finance	1 day?	Mon 20/10/08	Mon 20/10/08
51	✓	Incorporate new product information into reports	1 day?	Mon 20/10/08	Mon 20/10/08
52					
53		[-] Sales	145 days?	Mon 13/10/08	Fri 01/05/09
54		[-] Develop training curriculum/materials	145 days?	Mon 13/10/08	Fri 01/05/09
55	✓	Sales Training Kickoff	1 day?	Mon 13/10/08	Mon 13/10/08
56		[-] Sales Training	144 days	Tue 14/10/08	Fri 01/05/09
57		Update existing sales training materials	144 days	Tue 14/10/08	Fri 01/05/09
58		New York Phase curriculum update	85 days	Mon 06/04/09	Fri 31/07/09
59		Conference Presentation (Tentative)	85 days	Mon 06/04/09	Fri 31/07/09

In the above example, there are four tasks at indent level 1 (rows 50, 53, 58, and 59); two tasks at indent level 2 (rows 51 and 54); two tasks at indent level 3 (rows 55 and 56); and one task at indent level 4 (row 57).

With the first slider control set at 1 and the second slider control set at 2, the four tasks at level 1 will become Activity Groups and the two tasks at level 2 (rows 51 and 54) would become Actions under their respective Activity Group. Tasks at level 3 and greater will not be converted. Note: blank rows are ignored during the conversion process.

Any tasks that have durations of 0 days (represented by a diamond in MS Project) and do not have any sub-tasks will be converted as milestones. If the indentation level of these tasks meant that they would have otherwise been considered as Activity Groups then they are placed in the Key Milestones section of the Swiftlight timeline. Other 0 day tasks converted as milestones are placed under their respective Activity Group.

For tasks that have Resource Names assigned, the first Resource Name listed is set as Responsible in Swiftlight. Other Resource Names are listed under Involved. Where there is no Resource Name listed, Responsible is set to Unassigned.

STEP FOUR: Confirmation and completion

Once you press "Next", the Swiftlight – MS Project Converter tool asks you to confirm the conversion to Swiftlight. Press "Convert" to proceed and within a moment you will be able to open your new Swiftlight file.

Comments About Converting MS Project Files to Swiftlight

The Swiftlight – MS Project converter works with MS Project 2002, 2007 and 2010, and is effective for creating "high level timelines and activity summaries" in Swiftlight from more detailed MS Project plans. It works best where you are taking a relatively small number of activities from MS Project, and where there is good use of milestones in the MS Project file as these will appear as visual check points across the timeline in Swiftlight. The two views you should review in Swiftlight after conversion are the Timeline (in interlaced mode with milestones) and the Activity Group Summary.

Basic Data mapping:

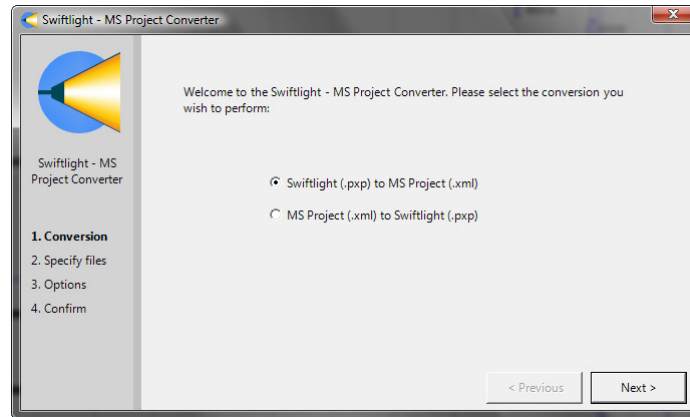
MS Project Data	→	Swiftlight Data
Activity/Task Start and End Dates		Activity Group Start and End Dates or Action Due Dates (ie end date), depending on the level of hierarchy at which data is converted. (Note: start dates are only captured for tasks that will become Activity Groups)
Milestones		Milestones
Responsibilities		The first Resource Name listed is set as Responsible in Swiftlight. Other Resource Names are listed under "Involved" for actions and milestones, but are not carried across for Activities as there is no equivalent field in Swiftlight for Activity Groups.
Baseline dates		Baseline dates for Activity Groups and milestones. Baseline dates for items lower down the hierarchy (i.e. actions) are not captured.
Baseline N=1 or more		Not available in Swiftlight
% Complete		% Complete (for Activity Groups only). Also affects status (e.g. Not Started, In Progress, Complete etc) of actions and milestones. Note: % work complete is not captured in Swiftlight.

(Note: we do not recommend trying to convert ALL the details of your MS Project file into Swiftlight, unless you are planning to use Swiftlight for on-going management, as the main benefit of conversion is to get a simpler high level plan).

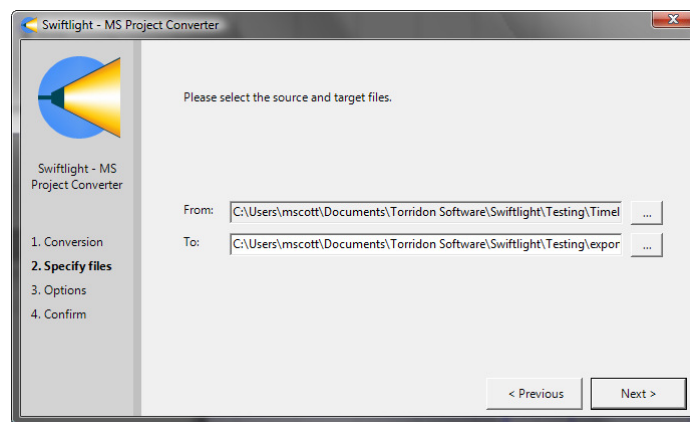
Exporting Swiftlight files into MS Project

STEP ONE: Open the Swiftlight – MS Project Converter tool and select the file you wish to convert

To convert a Swiftlight file to MS Project you must select the first option in the opening screen of the Swiftlight – MS Project Converter tool, and then press “Next”.



Then select the Swiftlight file you wish to convert and the name of the new .xml file that you will create during the conversion.



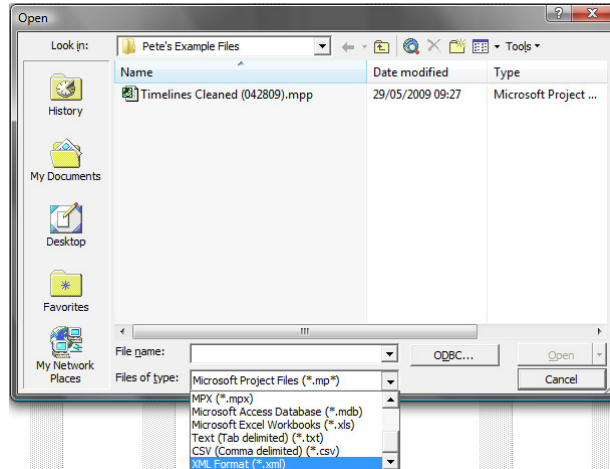
Use the buttons to the right of the “From:” and “To:” textboxes to browse to find the Swiftlight .pxp file that you wish to convert to MS Project as well as the giving a name for the new .xml file.

STEP TWO: Confirmation and conversion

When you press “Next”, the Swiftlight – MS Project Converter tool asks you to confirm the conversion. (Warnings are given if there are any Meetings, Milestones or Actions in the Swiftlight file that have a date outside the date range of the Activity Group with which they are associated, or if any Actions fall on a weekend day. The treatment of these two cases is explained below.) Press “Convert” to proceed.

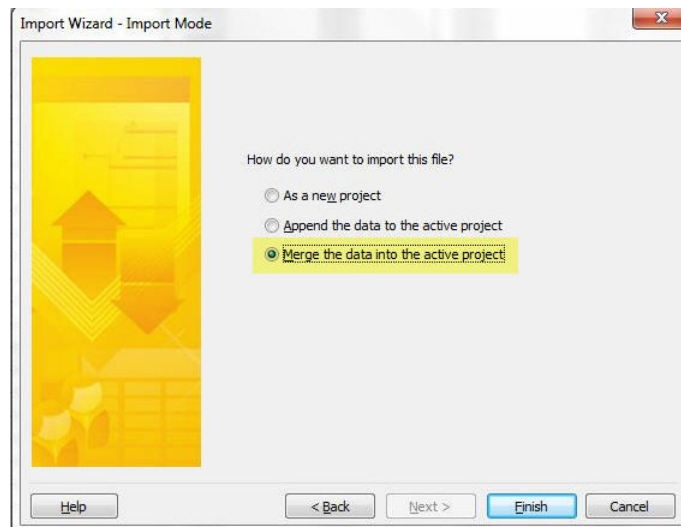
STEP THREE: Opening the new .xml file in MS Project

To open the newly created .xml file you will first need to open MS Project, and then **open a blank MS Project file** by going File > New. Then, use the "Open" option from the File menu to open the following dialogue:



To be able to find the newly created .xml file, you need to change the "Files of type" dropdown to "XML Format (*.xml)". Browse to find the new file and then press "Open".

MS Project will request "How do you want to import this file?" and three options will be given: "As a new project"; "Append the data to the active project"; or "Merge the data into the active project". **Choose "Merge the data into the active project" (THIS IS IMPORTANT!).**



Once the new file is opened, you may note the following:

1. Activity Groups appear as level 1 tasks in MS Project, with their sub-tasks (milestones, meetings and actions) at level two in the hierarchy. There is also a "Key Meeting and Milestone" activity in MS Project which captures the key meetings and milestones from that part of the Swiftlight timeline.
2. Activity Groups also contain milestones placed at the start and end of each Activity Group to ensure that the Activity Group has the correct duration in the MS Project file, rather being re-arranged by the MS Project scheduling engine. The exception to this is if there was a Meeting, Milestone or Action that fell outside the date range of the Activity Group in the Swiftlight file. In this case, the task representing the Activity Group spans the date range from the earliest event (including the "Start of ..." Milestone) to the latest event (including the "End of ..." Milestone) in the Activity Group.

3. Swiftlight Meetings and Milestones are represented as 0, 0?, or 1? day duration tasks and appear as milestones in MS Project, and Actions are represented by tasks of 1 day duration. There are a couple of exceptions to this:
 - When an Action or Milestone falls on a weekend day. In this case, MS Project typically shortens the task to zero days as it does not want to allocate resources on a weekend. Milestones or the start / end of Activity Groups that fall on a weekend, may have their date shifted to the next Monday by MS Project.
 - When actions or milestones are marked as "100% complete" in Swiftlight. In this case MS Project's automatic scheduling may also change the duration of the task based on its assessment of resource constraints. Further, the way it does this varies across versions of MS Project. For this reason, we advise caution if your Swiftlight file has completed actions or milestones in it.

Comments About Converting Swiftlight Files to MS Project

Overall, the converter effectively translates Swiftlight files and their Activity Groups, Milestones, Meetings and Actions, start / end dates and responsibilities into MS Project (2002, 2003, 2007, 2010) provided their dates occur during the working week and provided the items are incomplete. The best way to take advantage of this functionality is to undertake high level, "top down" planning in Swiftlight (e.g. creating a timeline of activities and milestones) and then pass the file on to MS Project for more detailed planning and refinement (if necessary).

Basic Data mapping:

Swiftlight Data	→	MS Project Data
Activity Group Start and End Dates		Task Start and End Dates
Action Due Dates		Task Start and End Dates (typically 1 day duration)
Milestones or Meetings		Milestones (0 or 1? day duration)
Responsibility		First Resource Name listed
Involved (for Meetings, Milestones and Actions)		Other Resource Names
Baseline dates for Activity Groups and Milestones		Baseline dates for tasks and milestones.
Task Status (e.g. Not started, In Progress, Complete)		Mapped to % Complete., however MS Project's automatic scheduling may alter end dates based on it's interpretation of resource constraints..
Activity Group % complete		Not mapped to MS Project, which calculates % complete based on bottom up task assessment.

(Note: use caution when the Swiftlight file has event dates that fall on a weekend or when events are complete, as MS Projects automatic scheduling may adapt the dates of these items).

Getting Help

We hope that this information will be sufficient to get you going with the Swiftlight – MS Project Converter tool. However if you need any further support please do not hesitate to contact us at support@torridonsolutions.com.

The Swiftlight Team
Torridon Solutions