

Planner 3

Steve Cotterell thinks that this basic scheduling and risk management package provides all of the functionality that many users require. And it's free!



PROJECT in a box, Prosis's methodology document management system, used to employ MS Project as its scheduling application. It was noticed, however, that most of the plans used in the real world use only the basic set of MS Project's functions and so were not only struggling with that application's complications, but were also paying for functions they weren't using. Prosis put together a basic scheduling package in Excel, which was popular and this inspired them to develop an application than can be used stand-alone or linked, seamlessly, with PROJECT in a box. Planner, a .NET application, was born. Version three was launched in May.

Accessed via the 'Plan' tab, the planning screen carries a split-screen view. In the top section (adjustable for height) is the Gantt chart. The bottom section contains a list of project tasks with the information shown in columns. There's a default display but you can customise this area to display the columns you require.

When you open a new plan, there's just one (dummy) task on view in each section, awaiting your editing. You can, however, customise the system to configure a starting project layout of your choice or to open at the last plan used.

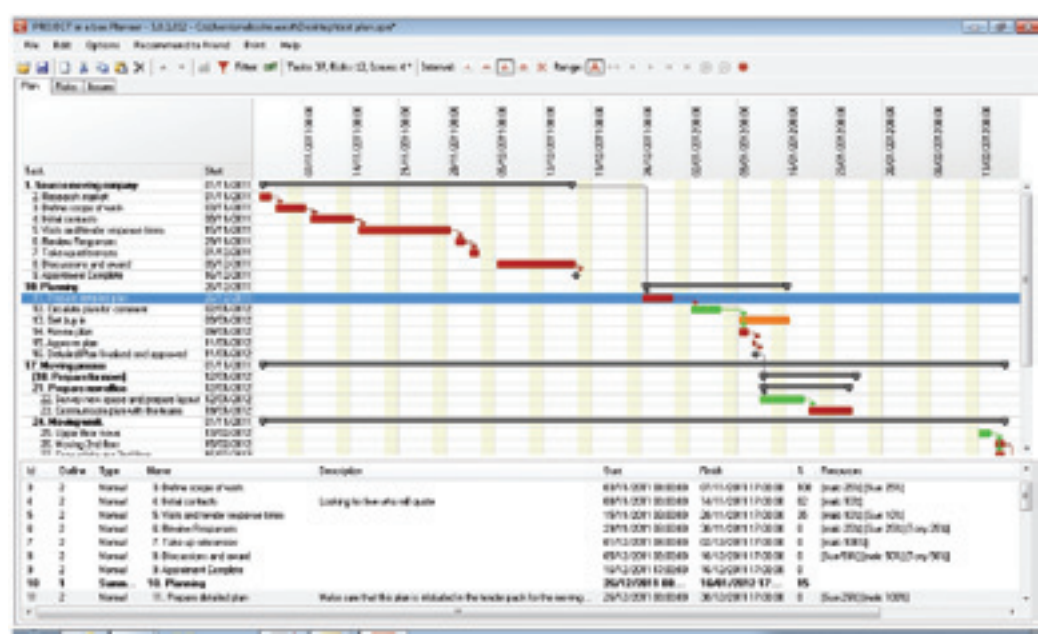
When you open the task, by clicking it in either section, a dialogue box appears in which you name and describe the task, and state whether it's a normal or summary task. If you set the task as a summary, much of the task-specific information in the dialogue box is greyed out. You choose the colour of the Gantt bar and (for normal tasks) set the start date and duration. Setting a task as a milestone causes it to be shown as a diamond on the chart.

You can set default summary task and task bar colours and you can also specify what data is to be shown in the single Gantt chart data column.

You continue to add tasks, building up the work breakdown structure (WBS). Summary tasks can be nested and, by default, each new task is added below the last summary task used but you can select another summary task to be used. There's no limit to the number of tasks you can enter.

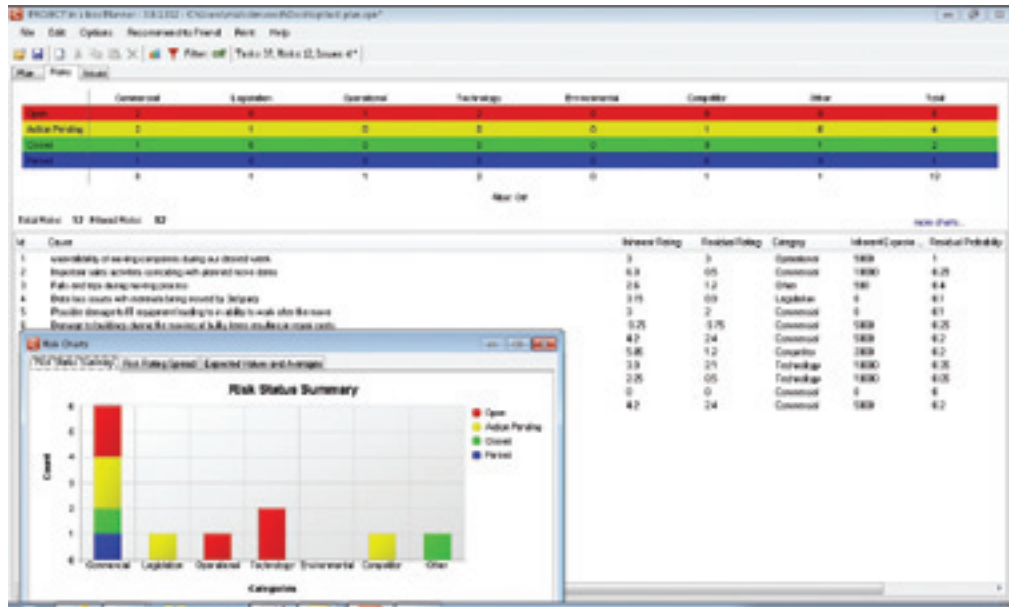
There are three different ways to enter a task's duration. You can specify that the task starts on a fixed date, with a specific duration. You can specify that the task starts after a preceding task (which can be a summary task) also with a specific duration. Only finish to start constraints are supported. You can set a lag on the

An excellent entry-level scheduling and risk management system, developed and maintained in the UK and available completely free of charge.



The Gantt chart

The Risk Register



constraint but, as the system currently stands, you can only have one predecessor for each task. In many instances, summary tasks can provide a way around this limitation but I think that Planner would be much stronger if multiple predecessors were possible.

The third way of entering a duration is to specify that the task starts and finishes on fixed dates.

The date range of the display is, by default, automatically adjusted so that you see the full spread of the project on the screen. For bigger plans you can disable this feature and then pan the Gantt right and left and zoom in and out. You can also make the display centre on the start or end date of a selected task. You can set the date format. The 'Date Range Options' allow you to set the display to show by hourly, daily, weekly, monthly or yearly divisions, and to display a specific date range. Non-working days are shaded.

The today's date time-line is automatically shown on the Gantt in green.

The system automatically indents the Gantt task list to conform to the WBS. At present the task text on the chart is black but in a future release it may be possible to colour it. Summary task text is highlighted in bold.

Individual tasks can be copied and pasted elsewhere in the Gantt. If a summary task is copied, all of its children are also copied.

A task can be highlighted and dragged up and down the task list. As it moves, its task number is automatically changed and it's fitted into the WBS outline at the appropriate level. If a summary task is moved, its child tasks go with it, their numbers and WBS outline position being correspondingly recalculated. The WBS position of a task can also be manually adjusted.

The display of summary groups can be expanded and collapsed using the right-click menu and all summary

groups can be expanded or collapsed simultaneously via the 'Edit' menu. When a summary task is collapsed, its name is boxed by square brackets.

Tasks can be tagged with keywords and then a filter run to display only tasks containing those keywords. A comprehensive set of predefined filters is available.

Into the task dialogue box's 'Description' pane you can enter your own text and hyperlinks to other documents. A second tag in this dialogue box leads to a 'Comment' page which can also contain text entry and hyperlinks and is often used for general update information.

Using the third tab, resources can be assigned using a drop-down, or can be manually entered, when they're automatically added to the project's resource list. By default a resource is assumed to be 100% allocated to the task unless a different figure is given.

The project's resource list can be viewed and can also be saved and presented as the starting point for future projects. You can create a template containing a default list of roles. Before resourcing a project, this list is edited, replacing the roles with people's names so that, when the project's resourced, the drop-down displays the names. If names are edited after the project's been resourced, the names against the tasks are automatically updated.

Calendars work at two levels. There's a calendar for the application which, unless you specify otherwise, is applied to all plans. You can also create project-specific calendars.

The application calendars are stored as XML files. There are two calendars available, a standard calendar and one defining Friday/Saturday weekends. These specify the working days per week and the hours per day. This information can be manually edited and you can add 'Exception Days' to include holiday details. You

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The Print Preview Screen



can create a project-specific calendar using the global calendar as a starting point and editing it to your requirements. A built-in check ensures that you haven't 'broken' the calendar. The next version of Planner will include resource-specific calendars.

When you save the plan, as an XML format SPN file, the file name becomes the name of the plan's zero level task.

To send the plan to another person, you'd attach the SPN file to an e-mail. They'll need Planner to view it so there's a 'Recommend to a Friend' menu option telling them how to get a free copy.

When progressing the plan, you can adjust the percentage complete figure (displayed in a Gantt chart column) by moving a slider on the task dialogue box. The percentage complete of summary tasks is automatically based upon the completion of its child tasks.

A right-click on the Gantt chart lets you choose to copy it (as it appears on the screen) to the clipboard as an image. You can also copy the task list, which you can tailor by turning columns on and off, as an image. Both images can be pasted into other applications.

You can copy the list of tasks to the clipboard as data, usually for transference to a spreadsheet. You can specify the data separator to be a tab or a comma.

Data can be imported from and exported to MS Project. This feature enables you to import a MS Project plan and share it at no extra cost.

When you export your data in MS Project import format, you can choose to combine Planner's 'Description' and 'Comments' fields into the MS Project 'Notes' field or choose to export one field or the other.

When importing, you browse for the MS Project file and then have two choices. You can either import using exact dates, without predecessor information being imported, or you can import the task links. Only finish to start links

are imported; other links won't be read in, only the tasks' start and finish dates. Where multiple predecessors exist, only the first one will be imported, possibly causing task dates to change. The file can be brought in as a new project or added to the end of an existing one.

You can select the language and have a choice of French, Dutch, Spanish, Polish or Czech. The translations are held in text files and a translation tool is available to simplify editing a language file should you wish to create a new one.

In addition to the 'Plan' tab, there are two others - 'Risks' and 'Issues'. You can switch off these tabs, displaying all three or just one.

Behind the Risks tab, the top part of the screen is a summary risk display and, at the bottom, the details. In this lower section the top part shows the risk items and, below that, the responses. If you click on the details of a risk that has some responses, these appear in the lower list. The responses pane can be hidden.

The summary display shows the risks divided by their status and sorted by the totals in each category. You can set your own categories but there is a default set.

To add a new risk you enter the owner (from the system's drop-down resource list), the date, the cause (mandatory), event, effect and the expected monetary exposure. You also select the category and the status and can add comments.

Using sliders, you set the impact, probability and proximity. The proximity slider can be hidden. As you move each slider, you see the value of that item - both inherent and residual risk ratings are shown.

In the risk list, you can sort the display by clicking the different column headings.

Risk responses are entered via another tab. Here, you enter the response category (avoidance, mitigation,

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acceptance). You enter the description and the owner (using the same drop-down resource list), the status, the name of the person taking action, and the response due date.

You then select the 'Residual Risk' tab and, using sliders, enter an estimation of the effects the responses will have on the risk, producing a new residual risk figure.

The display of columns in the risk table can be tailored in the same way as the Plan task list.

There are three risk analysis charts available. The 'Risk Status Summary', the 'Risk Rating Spread' (showing the inherent risks not closed and the open residual risks) and 'Expected Values and Averages' which lists statistics about the project risks.

If you right-click the Risk Summary you can copy it to the clipboard as a graphic that can be pasted into a document. The table can also be copied into a CSV file. The charts can be copied to the clipboard. Individual risks can also be copied and pasted.

Risks can be filtered using a comprehensive set of built-in filters, which are applied to all of the charts, only filtered information is displayed and can be copied.

There's a standard list of risk categories, but you can edit this and add new items. You can also re-order them. You can edit risk statuses and change the colour of the item backgrounds on the chart. The risk template can be saved.

You can change how the probability, impact and priority calculations are performed, setting your own values to the levels of probability and giving names to each level, instead of displaying them as percentages.

It's possible to set risk impacts at negative values, providing possible benefits to the company. This, in effect, keeps a record of opportunities.

Issues work in a similar way as risks. The categories are: Request for change, Off specification and Problems, but you can edit/add these. There are three status levels: Open, Action pending and Closed.

New issues are added via a dialogue box with sliders regulating the priority and severity (this feature may be changed in a future release). Fields contain the last update and closure dates, comments and responses. Issues can be ordered and filtered in a similar way to risks. Risks and issues can't be converted back and forth but this is on the list for future development.

Two issues charts are available, an 'Issues Status' bar chart and an 'Issue Indicator' bubble chart and data can be exported as an image or as CSV values.

The 'Print' menu allows you to create a report, specify what to include and preview it. Large charts are split across pages.

Where long text fields are involved, you can print the output as text (rather than as an image) which causes all the text to be shown, properly wrapped.

When installing Planner, you're given a 'Portable Mode' option. Instead of performing a standard, install to program files type configuration, all of the program's data and functional files are put into one folder, which can then be copied onto a memory stick (for example) and run on any .NET framework machine.

This also enables people who don't have the rights to install programs on their PCs to use this software from a USB stick or from a zipped folder that can be e-mailed around and moved into a usable position.

Prosis is currently working on a version that will run under the free, open source Mono system on Windows, Linux and Mac machines.

When used with the Prosis multi-user commercial package, Planner becomes an input and display device for the multiple project data held on the central database. In operation this is similar but, naturally, can be used to sort and filter the combined plans, including data from Planner, MS Project and Excel-based projects and allowing a higher level of resource management and the issue of customisable notifications.

How much does it cost?

Both the Community Edition of PROJECT in a box and Planner 3 may be downloaded completely free of charge, with no strings attached.

Right to reply

There are many very good planning tools out there in the market but we knew from speaking to lots of project people there was a big gap between the Excel option and MS Project or Asta and we were always being asked for recommendations. The answer was obvious... produce our own, and we have been delighted by the response from all our users. Those with Community Edition who are new to project management find it easy to use and well... you can't get more cost effective than free!

The revelation though has been the way our larger commercial PROJECT in a box customers have taken to it. Now they can let the PMs or planners who have MS Project continue to use that and let the wider community use Planner with a massive cost saving. When read into our reporting, resourcing and notifications capability in the commercial packages it doesn't matter if the tasks came from MS Project, Planner or even good old Excel. This means they can pick the planning tool to match the size and complexity of each project.

Planner will remain free and following on from Risks and Issues we will continue to add substantial features in the coming months.

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