

A photograph of Steve Cotterell, a man with grey hair and glasses, wearing a dark jacket over a light-colored shirt. He is standing in front of a city street with trees and buildings in the background.

SOFTWARE REVIEW 261

Steve Cotterell reviews a professional standard planning tool that contains risk and issue functionality and is available completely free of charge.

PROJECT in a box Planner version 5

Why pay for a planning, risk and issue application when you can have this one for free?

This professional planning tool is freely downloadable. It's a single-user, stand-alone product that supports the planning of projects down to task level as well as handling your risk and issue registers. However, you don't have to use all three of these functions - it can handle any one alone or any combination of the three.

What you see when you open the application depends upon what you were doing when you last saved the file, as the application re-opens at that point. At the top of the screen are a menu bar and a ribbon giving access to commonly used functions. Then comes a row of tabs. The tabs that you can see depend on how you have the application configured but the full line-up is Plan, Risks, Issues, Calendar and Milestones.

Beneath the "Plan" tab is the Gantt display. The top half of the screen shows the Gantt and below that is a task list. You can adjust the amount of screen that each section occupies. If you highlight a line in the Gantt, that task is also highlighted in the task list. If you select a task in the task list, the Gantt display jumps to that section. There's no limit to the number of tasks that can be entered into a project.

You can colour non-working days, set different task colours and make a task bar change colour on reaching a certain percentage complete. You can also highlight individual tasks by manually colouring them.

Only finish to start dependencies are accommodated by this application. You set the dependencies by opening the "Task Data Form" and entering the details there. Single and multiple predecessors can be accommodated, as can lags on predecessors. Here, you set start dates and durations with time divisions of down to one minute being accepted.

On this form you name the task, enter an optional description and define whether it's a normal task, a summary task or a milestone.

When adding a task to an existing plan, you use a feature on this form to select where in the work breakdown structure the tasks sits. You can also add tasks by right-clicking an adjacent task and selecting "Add" from the menu that appears.

As well as copying blocks of data from a plan, you can copy a complete summary group and paste it back. The system takes the

dependencies within the group with it but deletes any external dependencies. Costs, resource and other data are also copied across.

During progressing, you also enter the percentage complete via a slider on the Task Data Form.

The task “Comment” tab provides an area where the task commentary text (which can be used later in reports) can be entered. Text can be copied and pasted onto this area.

Below the task “Resources & Costs” tab is an area in which you may, optionally, enter the task resource information (name, allocation percentage, hourly cost) and the system will then calculate the number of hours that person has been assigned to the task, based on the task duration.

In a lower panel on the screen, the system calculates the resource cost per hour for this task. You can also enter a fixed cost (such as materials) and the system then calculates the total budgeted cost for the task. As the task progresses, you use this screen to record the resources’ actual hours. The system then calculates the actual cost to date and, in the lower part of the screen, all resource costs are rolled up to show the total task cost to date. Also displayed is a “Progress Cost” figure. This is calculated by taking the percentage complete figure and comparing it with the budget costs. An actual cost figure is displayed and this can be compared with the Progress Cost to see if the task spending is on track.

All of the financial calculations are rolled up through summary tasks (which can be collapsed and expanded) to give project total figures. The Time Bar at the top of the Gantt can be set to automatically adjust itself according to the date range you choose to display. However, you have full control over this display and by turning the “Auto Date Range” off you can zoom in and out to your heart’s content.

A Search tab lets you search the entire file for tasks containing a specific word or phrase in the task title.

As an alternative to viewing the project on the Gantt chart, Planner offers two other options, Calendar and Milestones.

In the Calendar display, similar to the system used in Outlook, on a weekly or monthly calendar, you’re shown which tasks are due to be worked on during each day. The first day of a task is highlighted and carries the task name. The duration of the task is indicated by a continuation of the same colour bar in a paler shade.

Hover the cursor over a task bar to see a pop-up box containing some details of the task. Click on a task to open the Task Data Form to edit its details.

The calendar also displays risk and issue responses (more later).

The Milestone display shows a project timeline with the milestones in place. Again, hover to see details and click to open the Task Data Form.

Any screen displayed by Planner can be right-clicked to grab it and paste it into any other application. If you right click on the Calendar screen, you’re also given the option of saving it as an iCalendar file which can then be imported into Google, Outlook and other calendar applications.

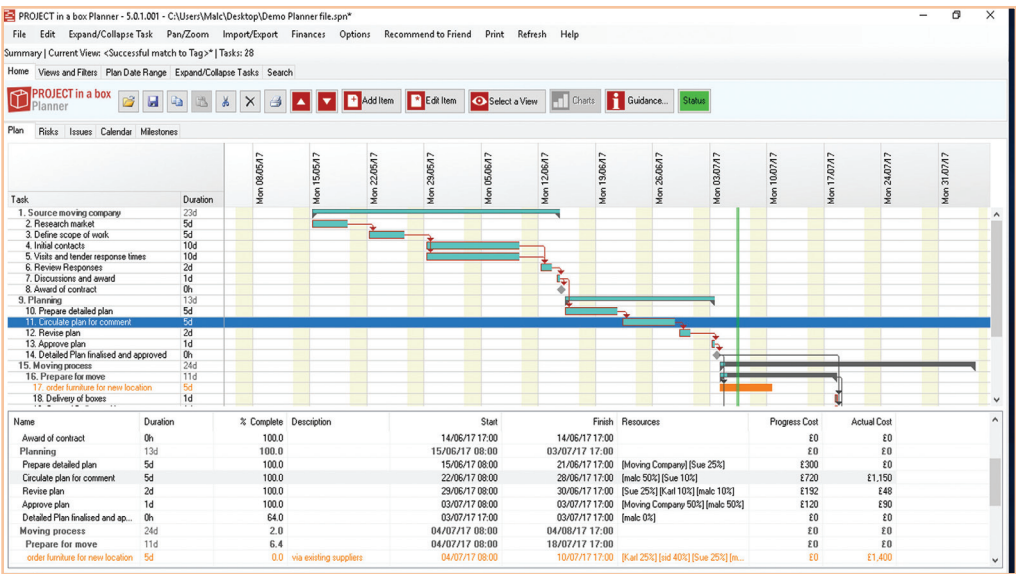
Beneath the “Views & Filters” tab, a menu ribbon offers the options you need. Everything you see in Planner is controlled by a view. There are about fifteen out-of-the-box views set up, including the Gantt, Calendar and Milestone views already mentioned. The “Select a View” button opens a pick list of available views including those out-of-the-box and any you may have configured and saved. Separate sets of view controls are available for Gantt, Calendar and Milestone views.

The usual way to create a new Gantt view is to select one that’s similar to your requirement and edit it. To do this you open the “Plan View” screen and, in the “General Display” section, choose what you want to see and how it will be sorted and displayed. As you choose the display options, they’re reflected on your screen in real time, allowing you to keep track of what you’re doing.

You can control the colours used in each type of view and, using tick boxes, choose which data columns you want to see and set the order in which they’re displayed. You can set the parameters under which the Auto Data Range display system works.

Switching to the “Filter” section, you firstly create a set of filtering rules and thereafter you can choose which rules to apply in any view. This screen lets you create and save sophisticated rules that apply to almost every area of the system and is probably best left to someone who understands the system well. A set of preconfigured rules is provided and these can be edited and saved as new rules.

Once you turn on a filter or a set of filters, whichever screen you display (Gantt, Calendar or Milestone), the data displayed in that screen is controlled by the set of filters applied. However, in any view the filters applicable to that view can be turned on and off and, by default, whenever you reopen Planner all filters are turned off.

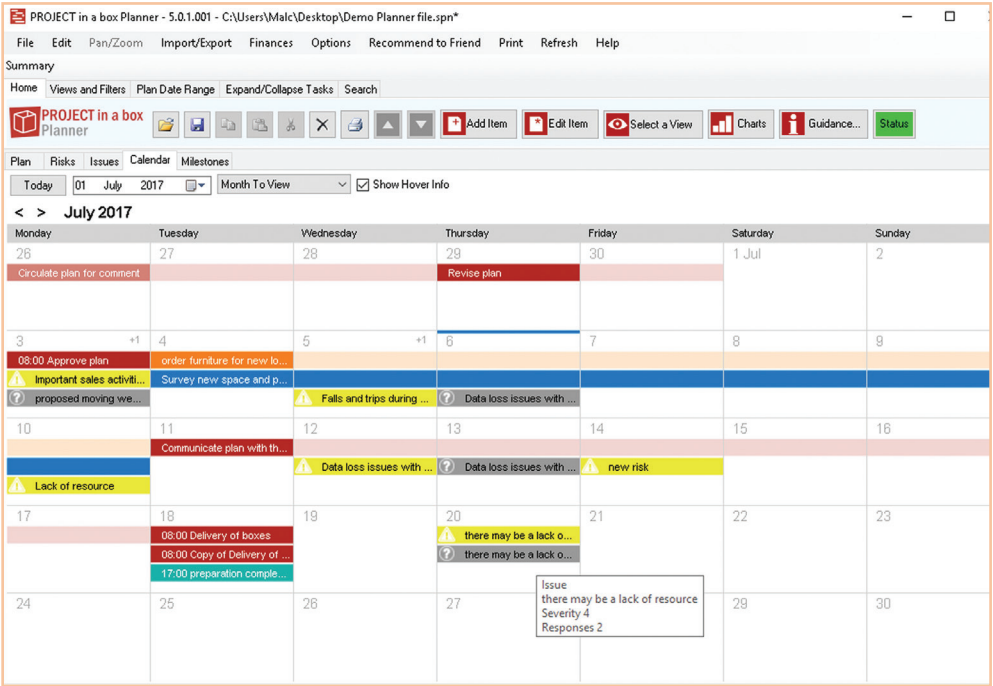


The Planner Gantt chart

The main “Finances” option gives you two options, “Costings Data Entry” and “Timesheet Data Entry”. The Costings Data Entry screen lists all the project’s tasks along with columns holding resource allocation details. From a drop-down pick list, you can select the name of a resource and the allocation and costing details of that resource appear against each task which that person has been assigned to. You can edit these details, add task fixed costs and assign that resource to other tasks using this screen. You can also see who else is working on each task and their percentage allocation.

The Timesheet Data Entry screen shows the same task list but with a different set of columns, including allocated and actual hours. Again, you select the resource’s name from a drop-down and that person’s allocation and actuals to date are displayed. If additional hours have been worked, you can edit the actuals to bring them up to date.

The “Risk” area opens to a screen divided into three sections. At the top is a summary table showing the risks by status and category. Below that is the list of risks and below that the list of responses. Highlight a risk in the central section and the responses to that risk are automatically highlighted in the bottom area. You could tailor this view so that, in the lower section, only the responses to the specifically highlighted risk are displayed.



A project illustrated in the Calendar display

To add a new risk, click “Add Item” to open a data entry form. You enter the name of the risk in the “General” area along with other information, some optional, including cause, status, category and owner. Moving to the data form’s “Inherent Risks” area you enter impact, probability and proximity values contributing towards the Inherent Risk Rating figure. You can enter a cost for the risk if you know it. In the “Response” area you can list your proposed responses to the risk, with owner and date details.

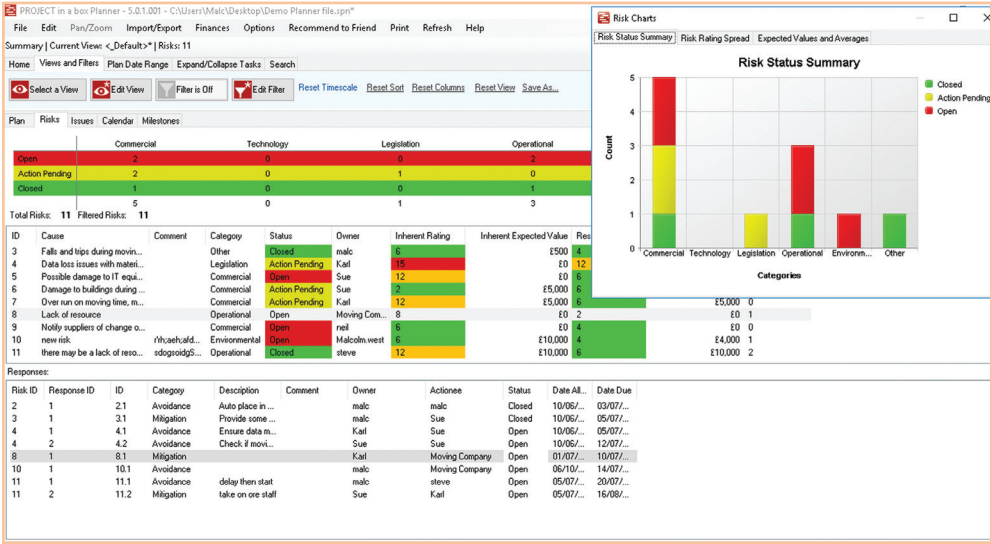
Having entered the responses you would go to the “Residual Risk” area and enter likely impact, probability and proximity of the risk after your mitigation actions have been taken.

In addition to the risk register screens, some other risk charts are available including a Risk Status Summary bar chart, a Risk Rating Spread and Expected Values and Averages.

All risk views are controlled via the “Views” option, are editable and new views can be created.

If you right-click any data list in the application, you’re given the option of copying the current data list which can be pasted to the clipboard or, more likely, to a spreadsheet. Some customers have created template spreadsheets containing built-in macros so that, on copying data across from Planner to the spreadsheet, analysis can be automatically performed and this system can be used on a regular basis.

In the “Issues” area, the layout is similar to the risk layout and issue data is added in a similar way with many similar data fields. The issue type is entered, with priority and severity. Comments can be added and responses entered. You also assess the impact in time, cost and quality and enter a quality impact rating.



A risk register with a Risk Status Summary barchart superimposed

A risk, should it materialise, can be copied across to the issue register and either deleted or closed in the risk register. The information that matches information in the issue register is copied and other fields are then available for you to complete or edit. In a similar way, an item entered as an issue can be copied across to become a new risk.

Additional issue charts available are Issue Status Summary, and Issue Indicator - which shows the status and severity of all issues.

The ribbon’s “Status” button provides an area to write commentary about the plan, risks and issues.

Data can be imported from and exported to CSV files and you can edit the raw data in a spreadsheet-like page before exporting it. When importing data you can either append it to existing data or replace existing data.

You can also import and export tasks to and from Microsoft Project files, again replacing or appending them to existing data. Because Planner only uses finish to start dependencies, when importing from Microsoft Project you can either choose not to import any dependencies and just import existing start and finish dates for tasks or choose to import all links as finish to start, in which case if other dependencies were used in Project, this may cause some start/finish dates to change and thus careful checking would be required.

Risks and issues may also be exported and imported via CSV files. The menu option "Print" gives you some basic reporting functionality. You can choose what's to be included in the report. You can include your own logo into the output file header. "Print" sends the report straight to the printer and "Print Preview" produces a PDF file which can either be saved or printed.

When copying a large plan to the clipboard, you can specify how many tasks per page are to be sent and the system will then send the plan, split into separate pages. You can adjust the image size before creating it.

In the system's administrative area, the "File" / "Manage Resources" menu gives you an area to list your resources and add their cost per hour. Lists of resources can be imported via CSV files. The "File" / "Manage Lookups" screen lets you add and edit pick list items and RAG ratings.

In the "Options" menu item you can password protect areas of the system. You can set the weighting to be used when calculating task percentage complete and set time, date and other display formats. The language used can be selected and, currently available, are French, Dutch, Polish, Spanish, Czech and Icelandic. You can write your own language translation file.

You can tailor the calendar, setting working days and hours per day, including bank holidays if wished. You can create different calendars for individual plans or you can use a global calendar.

Default user guidance pages are included but you can write your own if desired. There are two and a half hours of ten-minute training videos available on the Project in a box website which can be reached via Planner's "Help" button.

Users of the main Project in a box application get Planner as part of the installation at no additional cost. Users of the corporate version can edit their Planner file via a browser.

Users of the free version may wonder what Prosis gets out of it. There isn't a catch. The hope is that as they mature as users they will want to avail themselves of the added functionality of the main Project in a box system and so will upgrade. All of the data used in the stand-alone version will transfer seamlessly to the main application.

How much does it cost?

Absolutely nothing!

Right to Reply

It is five years since the first review of Planner and in that time it has leapt from that promising start to the mature product it is today. We set out to pitch Planner as a tool that anyone could use - something which delivered the features most commonly used in other planning applications.

Of course as more people have adopted it we have continued to flesh it out without getting too far from the ease of use principle. Project accounting including time recording and progress cost calculations have been popular additions. As have the integrated Risk, Issue, RAID capabilities.

All the new features in this latest release including the issue impact collection, calendar and milestone timelines have all been customer suggestions; true to our focus on the needs of practical users. A recent observant customer noted with frustration that the traditional planning tool percentage complete vs timeline is often actually not a good measure of whether a project is on track. So now we also calculate % progress to date a much clearer measure of on-track.

We are delighted to be able to keep Planner free to help many organisations and PMs to continue to improve their project controls.

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You can use this QR code to register for Planner today. Prosis Solutions will then email you the link to download and install it.

