

InstaPlan Version 2.0

Summary

InstaPlan Corporation of Mill Valley, California, was one of the first software developers to introduce a project management program with outlining features for the PC, in March of 1987. It is an entry-level software (list price \$99 for basic options), and potential buyers will want to take note of its unique features, usually found only in higher-priced software. (However, these features do not necessarily offer the overall power that you might expect.)

This release, an upgrade from Version 1.03, has been enhanced mainly in the following aspects: cost management (improved because you can group costs into higher levels), progress history recording and display, a spreadsheet with display of Period Actuals, planned and earned, a resource outline that can summarize several resources into higher levels, and Earned Value as well as C/SSR Reporting. Control management has been enhanced slightly by adding, with the history option, "work done percentage," yet the lack of actual start date option may not meet the basic requirements of many users.

The system interface now includes the ability to read a CSV file type (delimited ASCII characters). These additional features must be balanced against significant omissions and weaknesses, such as the inability of users to control sorting of activities on screen or in reports. (Essential!)

It is a rare PM software package that does not allow you to sort activities more than one way. And even though it is outstanding to find software at this price which can level resources, you can only level one at a time, making the process of leveling the entire project very tedious and non-optimized.

Contrary to its published claims, which suggest a much higher number, our testing found the program to be limited to about 200 activities in one project. It does not include PERT charting on screen. Instaplan 2.0 supports PERT analysis only with the purchase of a PERT module (\$79).

It does have a powerful feature not usually found in other PM programs--a spreadsheet that allows viewing on screen a list of resources across all or selected groups of activities, showing the amount of work (for example: man hours) that each resource is estimated to spend on each activity.

The context-sensitive help facility does not make InstaPlan as intuitive as it could be. Users must pass through menu selections with most functions, and the inconsistent keys used to implement menu commands inhibit user learning and retention of command implementation.

There is the ability to create and use detailed time frames (to the hour), and the program supports individual resource calendars, but the calendar lacks the ability to specify time of day.

It does support sub-projecting in the classic way, which allows users to expand their project size under certain circumstances (see sub-projecting in the Guide to Terminology). InstaPlan provides a limited report writer and permits exporting to and importing from popular programs, including dBASE and Lotus 1-2-3.

InstaPlan 2.0 is available for the PC/MS-DOS operating system running IBM PCs and compatibles, or PS/2s. It supports monochrome or color monitors with up to VGA resolution in text mode. It is designed for a single-user. No LAN version is available, although you can load the same version on a LAN and use the program copy from other machines in the network and work on data files (as long as only one user works on these files at a time.) Version 2.0 does not have EMS support, although Version 5000 (available since August 1989, for \$495) does.

InstaPlan 2.0 is upwardly compatible with plan files from previous versions, and with the addition of the InstaPlan Tracker, (\$79), provides the ability to create a reference plan and input actual progress, which will compute schedule variances, percent complete and C/SSR data. InstaPlan, however, does not support Plotter output.

InstaPlan may be the software you are looking for, especially if you want to manage a small project with relatively limited scheduling, resource and reporting features, and have a limited □ budget. We rated it as a PM SOLUTIONS second choice.

Strengths

The ability to select tested programs by feature with confidence is one of the major benefits of PM solutions, and that insight is provided here with an analysis of selected strengths which are sometimes unique and unexpected with a software package at this price. The buyer will want to measure these benefits against more general criteria in the "needs analysis" section of this manual.

One of this program's most powerful and unique features is its ability to display on screen a complete spreadsheet showing a list of resources across the top line against all or selected groups of activities on the left column, presenting the amount of work each resource is estimated to spend on every activity. You can scroll left and right to focus on any resource. This provides the opportunity to review and change resource usage easily.

(INCLUDE SCREEN SNAPSHOT of SPREADSHEET HERE)

InstaPlan permits you to set up an end date delay to the project and thus delay activities until resource loading consumes the duration of the delay.

For a package at its price range, InstaPlan provides flexibility in allowing the assignment of labor resources to activities in more than one way: hours/day, or percent of resource capacity with the duration of the resource. Also, you can assign a fixed amount of work in three different ways:

- 1) Working time without specifying a rate of work.
- 2) Working time at a rate.
- 3) Quantity of work at a rate.

The Automatic Undo option will 'undo' the previously used command or input feature.

There is no software limit to the number of cost fields (overhead cost types) per task.

The History option allows you to track the history of Actuals for your project against a reference plan. This is a very powerful feature, as it gives you the ability to track the project along with variance against estimates, percent completion, and C/SSR data, including Earned Value calculations of work accomplished. The program can display Actual vs. Budget Variances both numerically and graphically, and provides an XY Cost/Schedule chart that can be based on period data history.

However, it lacks Work Breakdown Structure, a necessary analysis feature for government reporting purposes, and thus may not provide the overall power that is expected. Group percent progress is another powerful feature of the "Tracker" option, allowing the user to monitor the percent progress or completion of a group of activities.

Instaplan creates an automatic backup of your plan, and will notify you on screen if there is not enough room on disk to save your changes.

Function keys are used to toggle views of charts and editing screens, and a keyboard template is provided with the program.

Weaknesses

Things are not always what they seem to be, in life or project management, and buyers will want to take note of limitations which take away some of the attraction offered by other features in this package.

The so-called on screen 'PERT chart' of the basic program offers you a restricted view of the direct relationships of other activities to and from the current task. You cannot see the whole PERT and not more than three successors or predecessors per activity.

There is no user-defined workweek pattern with individual resource workweek calendars. However, you can specify a completely different workweek manually for the life of a project. This could become very tedious for a long project if not standard. The ability to specify a unique workweek for any particular resource would grant users flexibility in using and managing resources when their availability changes.

Instaplan can schedule to the year 2005, which would be enough time for most projects. (InstaPlan published specifications show a 20-year project duration, because you can schedule a project start date as far back as 1985, but projects with current start dates are limited to the time remaining).

InstaPlan does not support backward calculations if only the end date is known.

InstaPlan has no multi-project capabilities across different files, such as resource aggregation across projects, or multi-project resource leveling, etc.

The menu selections are inconsistent--in some cases the selections are invoked by using the first letter of the available choice, others are invoked only by using the space bar after a selection is made. The Forms in Edit Mode are accepted by using the Escape key--pretty confusing! From Forms, just pushing the Escape key twice will exit (without user confirmation) to plans from menus.

Instaplan allows you to assign a resource for a shorter or a longer duration than the activity to which it is assigned. But users should not be confused with the option that allows complete freedom in assigning resources to portions of the activity duration. When you assign a resource to an activity you are prompted for the duration of the assignment. You may not define a delay before starting the assignment.

No priority level choices can be assigned to activities. Users cannot specify cost account codes for segregating expenses.

The assumption that all new activities indented within the same outline are linked in a finish to start relationship adds unnecessary work to users who intend to link them merely in parallel.

The Index provided with the user manual seems to leave out fundamental terms, such as "Histogram," and "Resource Leveling," (called "Resource Loading" by Instaplan.) The "HOW TO" index, although unique, is not in alphabetical order.

InstaPlan is installed by copying the program into a previously named directory, (there is no automatic installation except for selection of printer driver). Starting a project begins with specifying a project start date at the sign-on screen, which also includes a notice of installed options, (such as Tracker,) and the presently installed printer and printer port. You are then presented with the "activity menu" and an outline screen ("activity view") in which you can start entering activities.

At this time you can specify a schedule for your list of activities, and create a resource pool by selecting the "resource view" (F9). For each resource you can specify "budget" (overhead) or "daily capacity" (e.g. hours/day, etc.) After resources are defined, the resource calendar can be created. Calendars are defined using the wall-chart method, where all holidays can be toggled to "on" or "off." Then non-working hours of each day can be defined. You can specify the NUMBER of hours worked in a day, but cannot delineate which hours those are.

Tasks are defined one by one in the "activity view" (you can toggle from the "resource view" by pressing F1) and then the user can input their estimated durations using the tab key. All previous activities are available for choosing/editing including durations.

The GANT chart is implemented by pressing F3, and the PERT by pressing F5.

Changes to activities are implemented immediately on screen in "views" and charts.

Calculations can be done for the whole schedule interactively, and resources can be leveled by implementing the "view loading" command.

Activities are updated in all views either by pressing F4 or by selecting "edit" from the main menu, and can be filtered using a selection of fields in "focus," (F8), both on screen and for charts. The "print" option provides users the ability to define reports using selectable fields, including the option to filter them using the previously mentioned "focus" criteria.

The "options" menu allows selecting and changing such things as presentation colors, time units, form of dates, progress and variance, etc.

Posting progress is accomplished by selecting one of the progress fields in the "option" menu and using this to filter reports accordingly.

In conclusion, InstaPlan Version 2.0 is an entry-level software (\$99 for basic options), and potential buyers will want to take note of its unique features usually found only in higher-priced software, although these features do not necessarily offer the overall power that you might expect for the price.