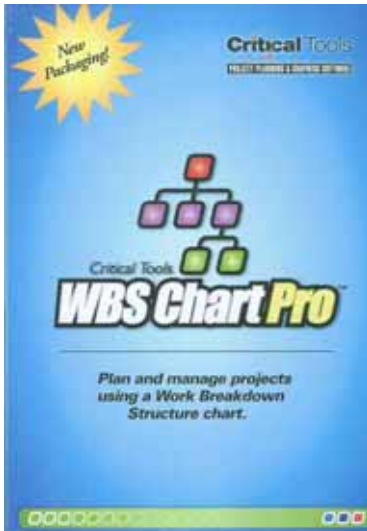




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WBS Chart Pro™

Project Planning and Graphing Software

Critical Tools™

www.criticaltools.com

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The WBS is probably the single most important component in the project plan, not only because it indicates what should be done, but equally important, it indicates what should NOT be done. Over the years, I have slowly drifted into the mode of providing stakeholders with an MS Project generated outline as the mechanism for defining the scope of the project. This was partly due to my dissatisfaction with how well MS Project integrated with Visio in order to create graphical WBSs. However, for most people, a graphical WBS is much easier to read and understand than an outline and is a much better mechanism for communicating the scope of the project and managing stakeholder expectations. WBS Chart Pro provides this capability and more.

WBS Chart Pro is Windows based and the manual indicated very frugal system requirements (Windows 95 and up with only 16 Mbyte of RAM). Compatibility with MS Project 98 through 2003 was also indicated. I guess there still may be some Project Managers using MS Project 98. WBS Chart Pro will run standalone, but the real benefit is in its ability to integrate seamlessly with MS Project. For the record, I test drove Version 4.5 of the application on a Dell Inspiron 300m laptop with 1.1 Gbyte of Ram running Windows XP, SP2 and MS Project 2003 Standard.

As a planning tool, WBS Chart Pro let me quickly generate a top-down work breakdown structure while collaborating with one of my project teams using a digital projector. It is fast enough and flexible enough as to not detract from the task at hand and within a consultant/client relationship at least, certainly adds a level of sophistication and professionalism. I think the days of creating a WBS with sticky notes on a white board are now numbered.

I did have some trouble initially with understanding where new tasks would be inserted when using the application. WBS Chart Pro provides four controls to insert a new task (Insert Left, Right, Above, and Below). However, the position chosen relative to the currently selected task is based on the orientation of tasks within the current WBS branch. Five minutes with the manual would have eliminated this confusion, but in typical engineering fashion, I jumped right in. This is not to say that

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using the software is not intuitive, and once I understood the insertion mechanism I was able to easily fly through the creation of a top-down WBS. However, I would recommend a dry run with the application before your first real world use, especially if that use is in front of a customer or client.

WBS Chart Pro does provide the ability to enter task information directly, either by modifying the information displayed in each box (box content is easily configurable in each of the views) or pulling up a Task Information dialog box. It uses most of the data in the Project task table but not all. However, in my use of the application so far, I have not run into any task field that I thought I needed that was not there. Some things, such as task dependencies, are probably better left to after the WBS is linked to a project file.

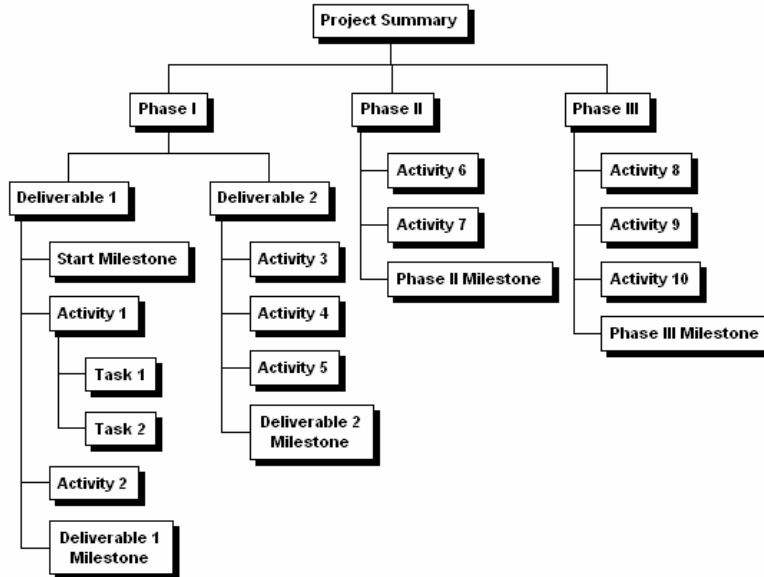


Figure 1. Planning View

in order to be standalone, it must provide these capabilities. One other ability to note is that it does include the ability to add a hyperlink to each task.

It provides several pre-defined views as well as the ability to create and save your own, depending on how much task information you want displayed. I modified the progress view to include additional fields and think I may switch to carrying that when updating and discussing project status with team members. Modified views are saved within the current WBS file but can selectively be available for global use if desired.

Box styles can be individually changed but the functionality I really liked was having the box formats determined automatically based on specific project criteria, such as whether the task is on the critical path, whether specific flags are set, or even several

progress related criteria such as whether the task has been started, is in progress or has been completed. I anticipate that this

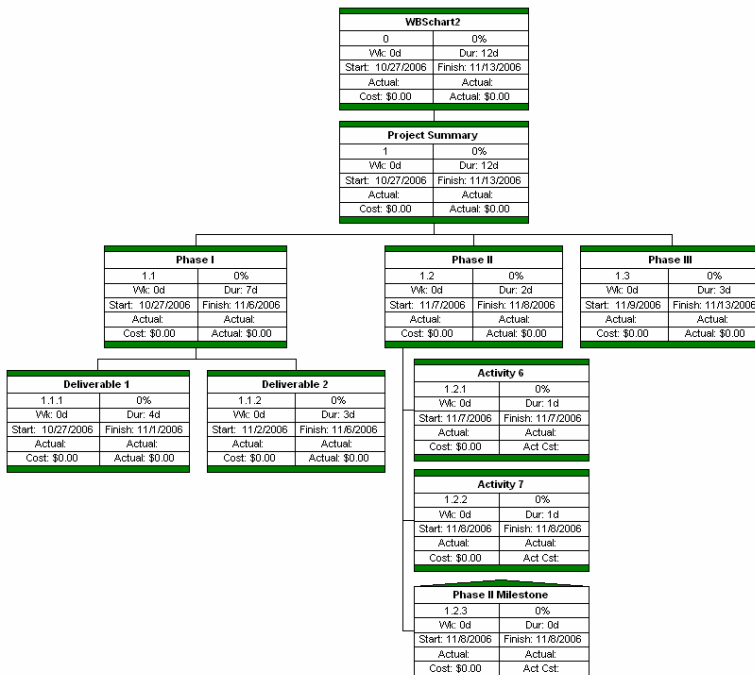


Figure 2. Progress View with Phase II Branch Expanded

capability will be extremely useful for developing custom views for distribution to specific levels of stakeholders.

Charts based on the current view can be easily saved as pictures for stakeholder distribution. The application supports *.jpg, *.png, *.tif, and *.bmp but does not support *.gif or *.pdf. This was a non-issue for me as I already have a *.pdf printer set up on my machine. They can also be saved as a web page and a basic template which can be edited is provided. Although I did not try the web based functionality, I can already imagine some potential applications with remote clients.

Once you are ready to create the project schedule, one button opens MS Project in the Gantt view and displays the tasks and their summaries based on the information entered into WBS Chart Pro. These two files are now linked, and changes within either application will be reflected in the other. In my mind, this is certainly the most powerful feature of this application.

Linking is based on the entire path so if files are moved around the link will need to be re-established. This is as simple as browsing to the new file location but it is something to keep in mind, especially with network installations.

From my perspective, the only shortcoming was that any line item in the project schedule is going to show up as an element on the WBS chart. In contrast, creating a Visio WBS from MS Project does allow selecting which tasks will show up on the graphical WBS. However, given that WBS Chart Pro provides so much more capability, careful selection of how tasks are organized and collapsed should allow working around this issue.

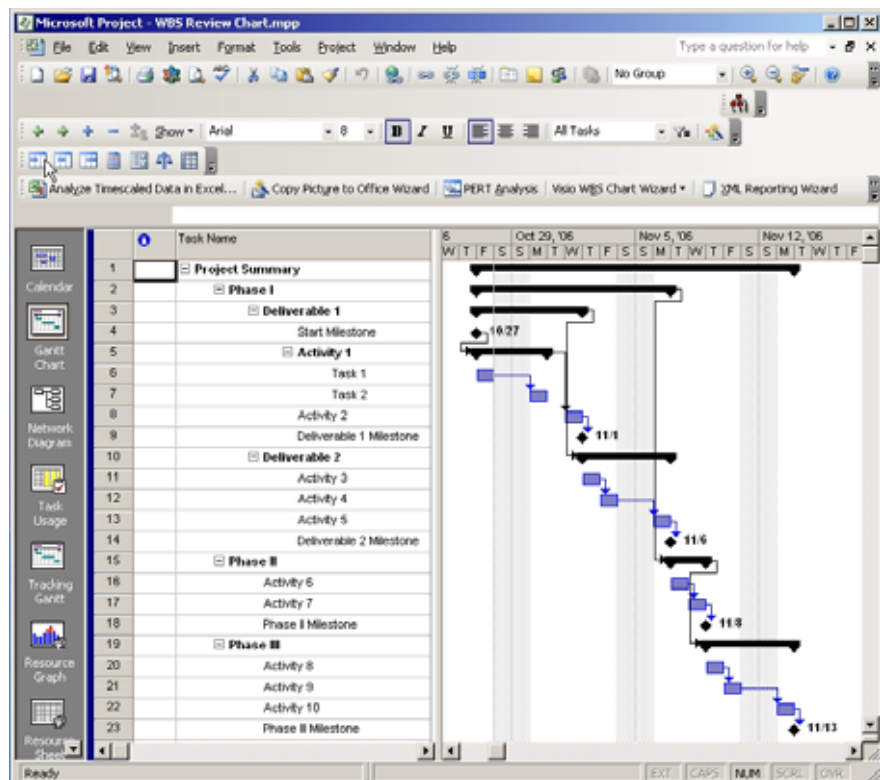


Figure 3. MS Project 2003 Schedule Created from WBS Chart Pro

The Bottom Line: The software has been around for a while and I wish I had found it sooner. It will clearly save me time and effort and is definitely worth the price of admission. A demo is available for download that limits you to printing only 50 tasks, which makes it easy to test drive. Once you try it, I am sure you will agree that this tool will help improve your productivity.