



PROJECT in a Box Version 4.3

Steve Cotterell has been reviewing Project in a Box for more than ten years and is impressed by how far it's progressed.

An application that began life as a methodology-based document management system and is blossoming into a useful enterprise project and portfolio management system.

It was more than ten years ago that I first reviewed Project in a Box and, as I looked at its functionality for this review, I was struck at how far this application has progressed since those early days.

Project in a Box is now available in SaaS and on premise versions, both work over the Internet or a local web and are accessed via a Windows application or through a browser. The new SaaS "Live Version", released last year, is data-hosted by a UK organisation covered by normal security rules, and is also available via the G-cloud. The Enterprise and Small Team Editions are only available in web or local versions.

The Browser interface runs in all popular browsers and, because it's browser-based and written using HTML, is completely brandable. This review is on the out-of-the-box product, but it can be tailored to appear as you wish, and images and icons can be replaced. Many customers have changed its appearance so completely that it's no longer recognisable as Project in a Box.

The browser interface contains the functionality to perform most day-to-day operations and now enables many administrative functions to be carried out via the browser; it's this interface that I'm looking at first.

Project in a Box screens are laid out, depending on the device used to display them, to facilitate their being seen and used most easily.

Having logged in with your username and password, or via Microsoft single sign-on, you see a control panel detailing your available options and displaying lists of the portfolios and projects that you have access rights to view. Your ability to perform most actions within this system is governed by your permissions and, to save repetition,

please take it as read that the appropriate rights are required to perform all activities covered in this review.

If you highlight a portfolio's name, the projects in that portfolio are listed. Select a project and its properties are displayed. A larger property set is now available than in previous versions. More about that later.

Clicking "Open Selected Project" causes the project navigation panel to open at the side of the screen. This can be expanded to full screen. This displays the process links associated with the methodology that you're using. Clicking a process link opens the list of documents associated with that process.

Project in a Box now comes with a total of twelve method templates. Prosis is the only organisation licensed to supply templates for Prince 2, MSP, DSDM 2 and Praxis.

The method used controls the way Project in a Box works and organisations can customise the out-of-the-box templates and create new ones using their own branding, terminology and processes.

Returning to the documents list, the document titles are grouped beneath the project processes and clicking a process expands the list. The files making up each document are grouped below the document's name, which provides a "holder" for the files and it's these that the system versions. When you point at a document's name, a (customisable) hint box explaining its purpose is displayed.

Once a file's selected, information about it is displayed in a separate area of the screen. Files can be edited and deleted and, if you click "View" the file opens in its native application, provided it's available on the device.

You can “Check-out” the current version of a file to edit and create a new version of it. While it’s checked out, other users can see who has it. They can view its previous version but only one person can work on a file at a time and earlier versions can’t be altered.

You can only check in a file with the same name as that of the checked out file. A naming convention inserts the project name, the project code and the (automatically updated) version number into the filename as it is saved. All previous versions are saved and can be viewed, forming an important aspect of the audit trail.

An “Add File” button allows you to add content to a document and, when using mobile devices, people use this facility to add photographs taken with the device to the document - for example on-site visits or pictures of brainstormed whiteboards. You can see who added an image, and when.

Some documents contain a set of headings that are themselves empty placeholders. These are areas where it’s probable that content will be added as the project progresses - evidence, approvals, test plans, etc.

Files can be emailed to other people. When you select a file and click “Email File” a window opens in which to prepare the email. You can enter the recipient’s email address or, if they’re a project team member, pick it from a list.

The selected file’s automatically attached and there’s space for you to enter a message. When the email’s sent, it contains your regular email address as the reply to address and a copy of the email is sent to your email address’ inbox.

Windows desktop users with Outlook can take advantage of Project in a Box’s close integration with that system which uses Outlook to send the message, the copy

appearing in Outlook’s “Sent” box

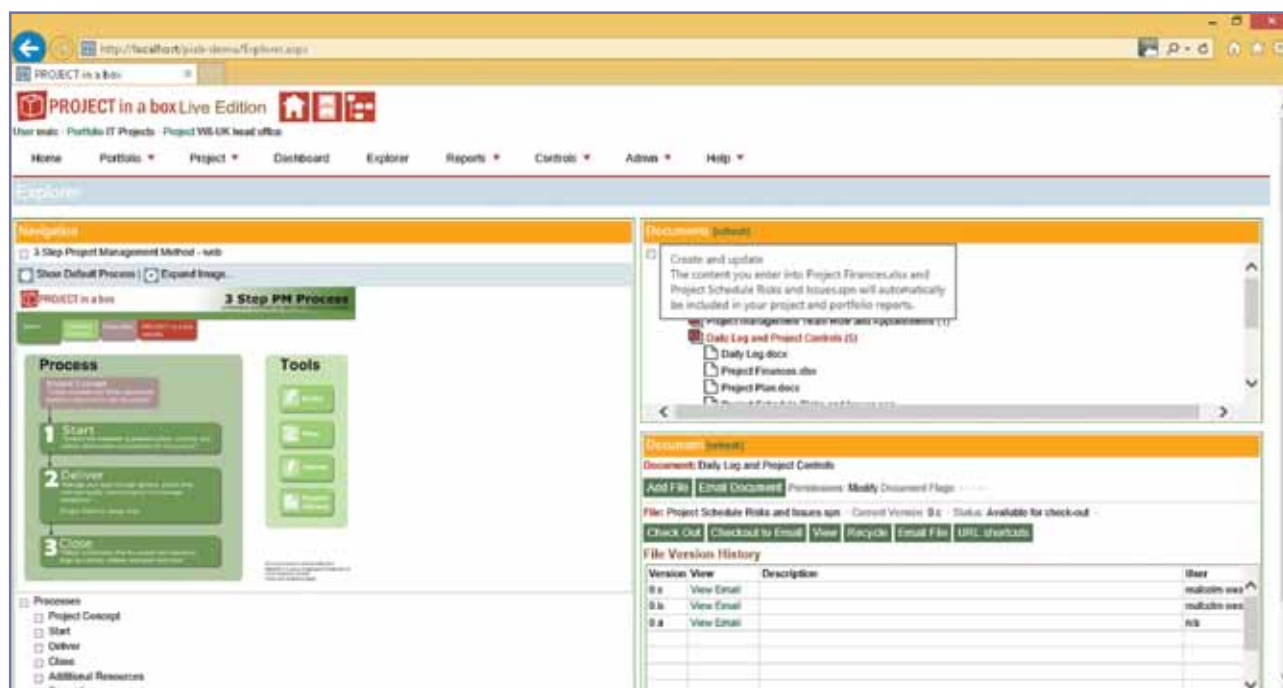
There’s a “Controls” database working behind the scene in Project in a Box. The type of data held here includes the plan, risks, issues etc. When setting up your project, you tell the system where this information’s stored, linking the external files to the system. Files that can be attached are the Prosis “Planner” files, Microsoft Project’s MPP files, Primavera transfer XER files and Excel files.

Selecting the “Controls” option from the Project in a Box main menu displays, by default, a Gantt chart with drop-down boxes to select the data range to be used and the view in which to see it. By default, the chart shows “My Tasks” for all projects but you can display personal, project and portfolio tasks for yourself or for other named users.

Below the Gantt is a section displaying task details, but the view can be altered to display one of a standard set of filtered views - for example overdue tasks, milestones or unresourced tasks. The Gantt display can be panned right and left and zoomed in and out so that large charts may be viewed in detail.

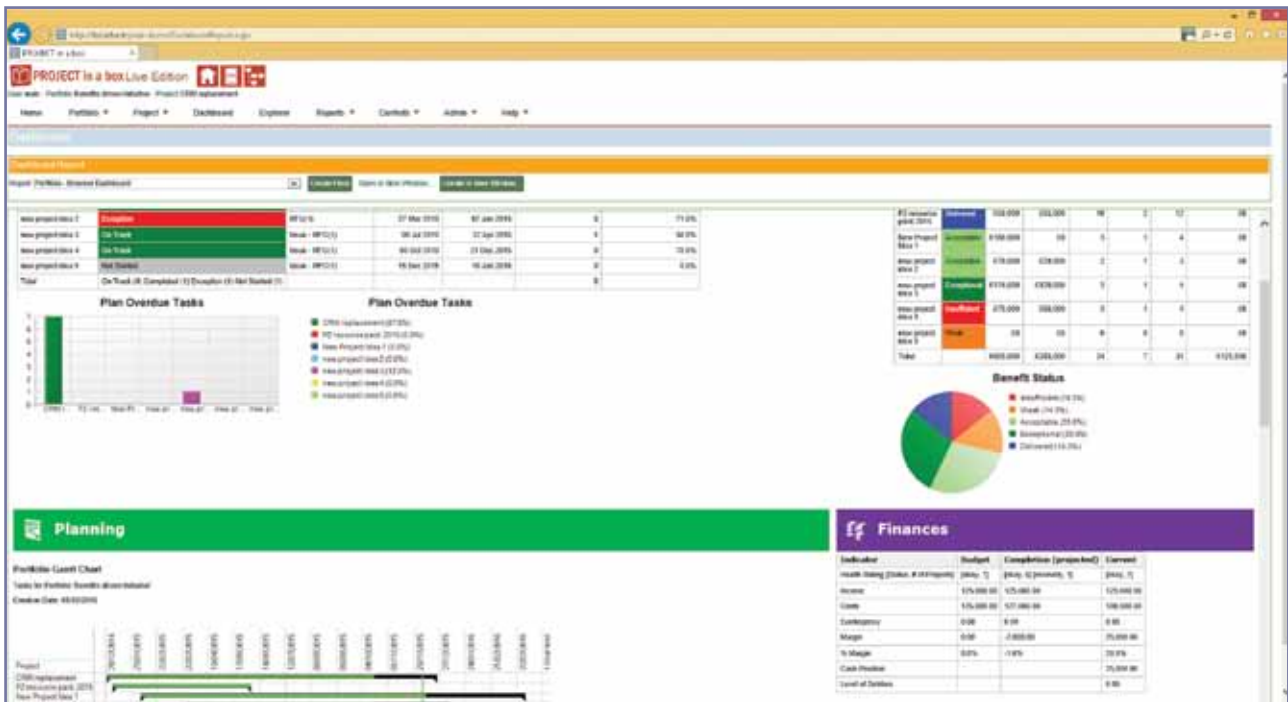
Moving from tasks to resources (a new area in this version), the “Resource Control” option displays a histogram detailing, by default, “All My Tasks” over a period of time which can be selected and shown by days, weeks, months or years. As with the tasks chart, you can select the data range and the view used to display it. You can choose to display information about individuals or you can, by control clicking names, display group results. Below the histogram are charts containing resource usage details.

Similar charts are used to display details of risks and issues. This data is imported from the Planner or Excel - but the Excel file must conform to a particular data



The Explorer screen

A Dashboard



structure. Prosis tells me that most customers utilise the Prosis free planner to record their risks and issues.

Above a list of the risks and issues are a set of graphical charts analysing the data. These charts can be turned on or off via a set of tick boxes and, for risks, include summaries, ratings spread, values and heat maps. For issues, the charts include summaries and a size and impact bubble chart.

The tasks, resources, risks and issues charts just view the data, which can only be updated in its native applications. However new in this version, Planner users of Project in a Box's browser interface can, by selecting the "Controls", "Edit Plan" option, check the Planner file out, edit it on their device and check it back into Project in a Box. It's intended to make it possible to edit risks and issues in a similar way in version 4.4 due later this year.

I mentioned that a list of the project properties appears in the main project information panel. These can be collected from the files that the task, risk and issue project controls are contained in, information being generated automatically from the data fields in these files - start date, total risk ratings, number of outstanding issues etc.

However, data can also be imported from Excel spreadsheets. Any spreadsheet can be linked to this area and the calculated and/or summarised data included here. As well as importing properties from external files, it's also possible to set up a form to collect manually entered information which can then be displayed alongside the other properties.

A set of views is available to display filtered collections of properties. These views, like all others in Project in a Box, are customisable using the main Windows application and new views can be added - more about this later.

You can set up reports via the main menu "Reports" option.

Using a set of checkboxes, you can select the information to be displayed. Where existing views are to be included in the report, you can set the view parameters as if you were configuring that view. A standard report template with logos, styles, etc. is used and this is customisable via the Windows application (again, more later).

Data from spreadsheets can be imported and included in the report, as tables or graphics, with a note specifying when that information was last updated.

Different reports can be viewed on different browser tabs which you can switch between.

Reports can be printed but they can also be put back into the project under one of the placeholders as content - termed "publishing it". Thereafter, by using the main menu "Reports" option, you can open the report library, see a list of the saved reports and open them. Reports can be saved under different categories with different permissions attached to each category.

Reports can be produced at both project and portfolio level. When producing a portfolio report, the system firstly outputs a report in which the data from the portfolio's projects has been summarised and has been treated in ways previously specified - totalled, averaged etc. Data from spreadsheets can also be included - the way this data is handled by the system being specified by codes incorporated into the spreadsheets.

Below the portfolio report is a set of hyperlinks, each leading to one of the project reports upon which it's based.

The main menu "Dashboard" option gives you a choice of preconfigured (as far as data content and layout are concerned) report definitions. These are editable in the Windows application, where new dashboards can be created.

Some new project administration functions have been incorporated in the browser version. You can now create new projects: you name it, choose which method template to use and which portfolio to add it to. The project is created, along with its report infrastructure and blank document templates.

Projects can be renamed and deleted. Both extra stages and project permissions can be added. Permissions are flexible, from bulk permissions for groups of people down to individual permissions for individual documents. If wished, the permissions can be preset in the method used. This isn't done in the out-of-the-box templates but can be included by user administrators.

New users can be created and passwords created and reset by the administrator, who can also manage the user license types. The administrator can see and modify an overview of all users and their various project permissions.

The Windows application connects to the same server via Web services and you login in the same way. Everything in the browser version is available here but there are a number of extra functions available.

When you open the list of portfolios and projects, you can decide which of the project properties to list. You can create and edit custom views of this screen, adding, moving and deleting columns and adding colours to highlight property statuses. Views can be saved and saved views can be used in the browser version.

Clicking a project name opens the navigation process diagram where you can add additional links that take you anywhere in the system. You can also interlink additional

navigation diagrams so, for example, you can create a set of buttons each leading to a preset preconfigured report that's run when you click the link.

The list of Gantt views can be customised by the administrator, who can create new views or edit existing ones and save them for general use.

When it comes to creating reports, you're given more choice about what can be included, allowing you to include or exclude specific spreadsheet elements.

You can include saved views in reports or create a custom view specific to that report. When setting the report output options, you have more choice, with new options added in this version. Both portrait and landscape reports can be created and output as HTML web pages or injected directly into Word as DOCX files, which can be edited, using the one of a range of preconfigured Word templates included in the product. Users can create new templates or Prosis can help them do this.

Portfolio reports can also be produced in Word and here you can also include project reports in the Word file, with a page break between each. If when producing a report, the system finds that an element required by the report isn't available, a warning message is displayed.

Reports set up in the Windows version can be saved for global use, for a specific project or just for your own use in both this and the browser version and can also be "published" to system placeholders.

When creating portfolio reports, graphic charts (histograms or pies containing numeric value and counts) can be set up and saved for use by the browser version.



A montage of views of Controls displayed on a tablet

The administrator can specify how the system properties are collected, formatted and displayed. New in this version you can intercept properties imported from the planning database and from spreadsheets, reformat them and give them an alternative display name.

You can also set up a system that scans task names for a specific name and adds data entered against that task (e.g. date) as a project property.

In the browser version you can see the portfolios and which projects are in each. You can create new portfolios and add projects and permissions to them. In the Windows application you can also set up rules that decide which project is added to which portfolio. These are filters that are applied to the project properties, for example projects with more than X open issues. And/or conditions can be set up and most Boolean elements can be taken into account. This enables you to produce portfolio reports or other analytics on specific set of projects. Rule sets can be saved, edited and reused.

Rules can also be created, in much the same way, to issue email notifications if something does or doesn't happen. Every notification consists of 1) the rules that determine the tasks involved 2) who gets the notification 3) the email title and text. You specify when the server compiles and sends the notifications (probably during silent hours). Where more than one notification is addressed to the same individual, they get one email containing all the notifications due at that time. The emails contain links that take you directly to the system item involved in the browser.

The rules can be run and the results viewed for test purposes.

Self-approval of documents on check-in is possible.

New in this version is a multi-person approval system. When a file's ready for approval, you

specify its approval route and name the approvers. They can be sent an email with a link to the approval form, to which they can add comments. The system also contains a view that gives details of all the approvals that you're involved in. By clicking an approval form, you can view the document and vote whether you approve it. You can see what other people have voted and commented and you can change your vote.

While a document's undergoing approval, it's locked against further checking out. A document isn't certified approved until everyone's voted. People can abstain but one rejection rejects the document. You can remove people who haven't voted from the approval list, but this (along with all other actions) is documented. An approval only relates to one version of the document.

Among other improvements and enhancements planned for the next Project in a Box version is a system for evaluating project proposals.

How much does it cost?

A Server licence for the Enterprise Edition costs £4,000, Manager User licences cost £300 each (Managers can be administrators and manage the system), Team User licences cost £250 each (Team users can check in and out documents, update content etc.), View Only User licences cost £25 each. Contact only users (who are unable to access the system but the system can notify them) are free. The Hosting Service costs £500 per six-month period. National and Global packages are also available.

Other versions are: Community Edition - Free; Personal Edition - £99; Small Team Edition (2 Manager, 6 Team & 12 View only users) - £999; Live Edition (5 Manager, 15 Team, 10 View only, annual licence hosted SaaS solution) - £250 per month.

Prince2 and MSP method templates cost extra. All prices exclude VAT.

Right to Reply

A comprehensive review which has captured well the development of PROJECT in a box from its roots as a tool purely to support methodology implementation. We haven't lost sight of that objective to enable projects to be methodology led and have deepened the capabilities in this area as well as adding the project controls and reporting capability required by organisations. Through this period, we have worked hard to keep PROJECT in a box as a tool that customers can personalise themselves without the need for expensive development changes and the introduction of native reporting to word files is a great example of this.

The significant extensions to the browser capability in this release truly open up the possibility of managing your portfolios and projects from any device without having to worry about this App or that, just follow the link and login.

Hot off the press: by the time this review is published www.yourpmo.co.uk will be launched as a SaaS service of this same version 4.3 PROJECT in a box capability but made available to individual users, giving the lone PM and contractor access to the same capabilities used by corporates.

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