



Project Manager

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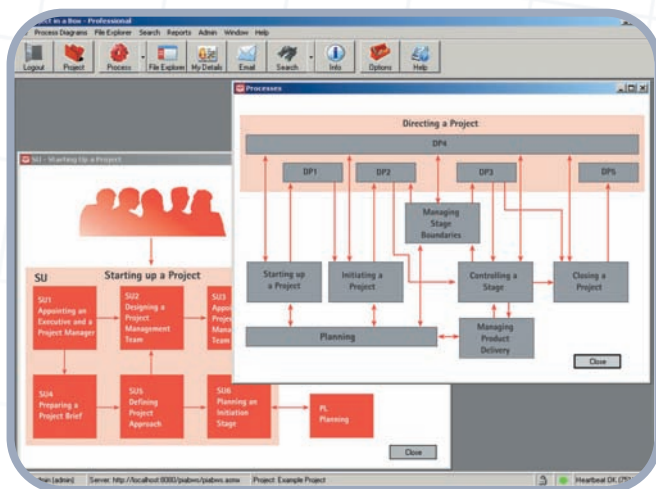
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PROJECT in a Box – Professional Edition

Steve Cotterell dissects a tool intended to simplify the use of the PRINCE2 methodology



You interact with the PRINCE2 project diagrams, straight from the manual

PROJECT in a Box (PIAB) is intended to help you perform PRINCE2 project support office work and to demystify the methodology. PRINCE2 normally produces a host of documents that are frequently stored in many different folders. It's not particularly easy to find such scattered documentation. PIAB's authors needed software to do this job and found the only tools available were large, expensive document management systems. They decided to write their own and Project in a Box is the result. Last May, we carried a 'Quicklook' at the 'Community' version of this product; a single-user version available as a free-of-charge download from www.projectinabox.org.uk. The multi-user, client/server version, PROJECT in a Box – Professional Edition (PIAB-PE), is aimed at small and medium-sized businesses.

PIAB-PE can run on an ordinary network or across the Web. When logging in, you choose which server you want to access – for example, if you have local and internet connections, both addresses will be shown. Different departments in an organisation could each run their own server and you could therefore be a client of several servers. Servers can be given names so that you don't have to remember which address relates to which server. Initially each address must be entered manually, but thereafter it's remembered by the system.

You log in with your user name and password. You can go straight to the last project accessed, or you can see a list of current projects to select the one that you want to work on. This project list only shows those to which you have access permission and which reside on the server that you're logged in to. At the foot of the screen there's a status bar displaying your user name and status (your permission level). It also

A tool designed to help users create and manage PRINCE2 documentation, making the application of this methodology to projects both easier and less mysterious.

shows which server you're logged into and which project is currently live and whether encryption is set. A red or green light indicates when you're communicating with the server (PIAB-PE works over a dial-up connection) and a 'Heartbeat' pulse, sent every few seconds to verify connection, is also displayed.

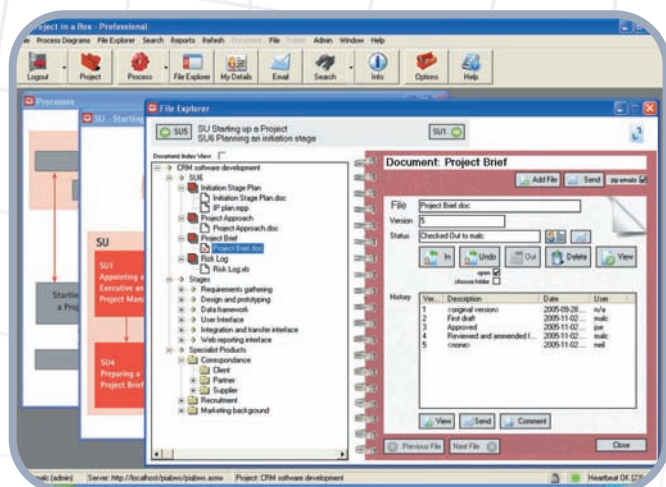
Once you've selected the project, you're taken into the diagrammatic project map. This is the PRINCE2 project diagram, from the manual. Whenever they consider it helpful, Prosis has used the original PRINCE2 material and OGC templates, licensed from the OGC.

If you click on one of the process boxes in the diagram you're taken to the PRINCE2 diagram for that process, which lists all the management tasks involved therein. For example if, in the Process diagram, you click the 'Starting up a Project' box, the diagram for that process (coded 'SU') opens showing that there are six sub-processes involved. If you then click on the first of these sub-process boxes (SU1 – Appointing an Executive and a Project Manager) PIAB-PE's own version of the Windows File Explorer opens. Prosis has cleverly taken the look and feel of the Windows file tree and adapted it to their own purpose. From now on I'll call this the 'Document Tree'.

Although the Document Tree looks like a file tree, the appearance of a file's name in that tree doesn't indicate where the file's actually stored. Hidden from the user's view, the file names in the tree are linked to pointers that tell the system where the file really is.

The Document Tree is on the left-hand side of the screen. It shows, at the highest level, the project's name. Beneath this is the name of the sub-process that you're working on and, at the next level down, the names of the PRINCE2 products required during this sub-process. For example, for SU1 it lists Appointments, Job Descriptions and Project Mandate documents. Shown beneath each of these headings are the Microsoft Word files containing the information used to make up these documents. As well as viewing the PRINCE2 product structure in the Document Tree, by clicking a check-box you can switch to the 'Document Index' view, which lists all of the project's documents in alphabetical order, with the files that comprise each document listed below its entry.

On the right-hand side of the screen is the Management Panel showing the details of the file highlighted in the tree. When you have a document area highlighted in the tree, you can use the management panel to add files to the document. When a file name is highlighted, you use it to manage that file.



Project in a Box Professional cleverly adapts the look and feel of the Windows file tree to its own purpose

If you double-click on the file name in the tree, the latest version is opened for viewing. Using the Management Panel you can view previous versions of the file and there's a set of buttons for performing other file operations. With these buttons, you can open a file for viewing or check it out – that is, move it to another location and, possibly open it for editing. You can move files and complete documents to a floppy disk or a USB key so that you can, for example, work on them at home. The file icon in the tree indicates (with a red cross) that the file is checked out and, in the Management Panel, the file's status shows who has it. A button to enable you to contact this person then becomes live. Once the work on the file has been finished, the person who checked it out can check it back in, when the file is removed from the floppy or key and restored to the system. In case of accidents to checked-out files, the system administrator can undo checkouts.

A file or a document can also be checked out and emailed from within the system (in its natural format or zipped) to someone in one operation using only Outlook at present. I noticed one disturbing point about this facility. The system includes the facility for the storage and maintenance of all users' personal details, including email addresses. The list of email addresses offered to you as potential recipients of such an emailed document contains details of everyone whose address is held by the system, not just those people with access rights to the document. It's your responsibility to ensure that you only email documents to people authorised to see them. However, you can email a document to 'everyone' and could, unwittingly send it to people who shouldn't see it. In mitigation, there's an administration facility that prevents the emailing of documents from within the system and Prosis tells me that this problem will be rectified in the next release.

A search facility lets you find files by keyword or filename and a delete button allows users with modify rights to delete a particular file from a document.

All the PRINCE documents

Prosis supplies two project templates. One contains the full set of PRINCE2 documents and files, as laid down by the OGC in the PRINCE2 manual, with the addition of a set of 'Appointment' files. The other is a reduced sub-set of these, known as 'Small Prince'.

Files provided with PIAB-PE are MS Office files but users can incorporate files of any format into the system. To add a file to a document, you click the Management Panel 'Add' button and browse to where that file is, click on it and, if thought necessary, enter a file description for use by the audit trail. It's not practical to provide template content for all files used within

documents and, where this is the case, 'placeholders' (empty database slots to remind users that a file might need to be generated and inserted there) are used.

Once a file has been added to a document, it's re-used wherever the same information is required elsewhere. For example, the Job Descriptions added to the SU1 document also appear in the SU3 document.

As the project develops, the management products required at each sub-process, or stage, vary and the system provides you with information about what's required at that point and, where applicable, supplies the appropriate template or placeholder.

Not all documents required at stage level are exclusive to individual stages, but apply to the project as a whole, for example, quality, risk and issue logs. Although entries point to these documents at each stage, all lead to a single set of logs (I think a toolbar 'Logs' button would be more useful).

Prosis has written Excel spreadsheet files containing the risk, issue and quality logs. These replace the OGC templates and Prosis considers them to be improvements on the originals but, if your system uses other files to hold logs, you can attach these instead.

The Risk Log spreadsheet comprises five separate worksheets. The first carries instructions for using the log, and the second is where user-defined risk categories, impact values and priority values are set up. The next worksheet contains the log itself and the fourth, the 'Risk Summary' provides a statistical review of the risks in both tabular and graphical format. The fifth 'Export Data' worksheet holds figures, produced by the system, that are used by in PIAB-PE's management reports.

Each risk is entered along a single row on the Log worksheet, which bears columns headed category, impact, probability, proximity, calculated risk rating (impact x probability x proximity) counter measures, owner, author, date identified and current status (a RAG indicator).

The Issue and Quality Logs are built in much the same way, using similar sets of worksheets and appropriate column headings.

No document review and approval system has been built into PIAB-PE's document management facilities, but the Quality Log can be used for this purpose. However, I think that it would be easier to use the log in this way if it was possible to link a document with a particular log entry, which, at present, you can't do.

When a log's checked out it's unavailable to other users. As this is likely to cause them appreciable inconvenience, I think the system administrator should be able to prevent log checkouts.

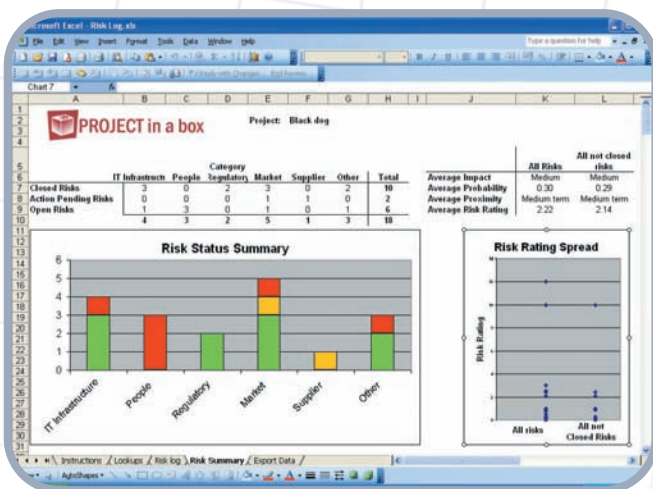
Although the logs hold the required information and work as intended, I'm not happy about their design. I think that when information's been entered into fields like risk 'counter measures', they could expand considerably, leading to much up and down and side to side scrolling. I think that a single form to document each risk would be tidier and easier to use.

PIAB-PE's based upon an SQL Server database and I'm surprised that Prosis chose to use Excel for their logs rather than the database they already had, where the points I've raised could be easily addressed.

In addition to the management products, in the Document Tree, there's also a 'Specialist Products' heading. Under this heading you can build your own folder/document/file structure. The Management Panel has a red surround whilst showing PRINCE2 document details; this changes to tan when focussing on specialist products.

This area could be used for filing drawings, specifications, and other project paperwork that hasn't a structured home elsewhere. This system comes into its own when documents are stored on individual users' machines but are shared through PIAB-PE.

Once a file's been added to a PIAB-PE folder, a copy is stored on PIAB-PE's server. This means that any change to the PIAB-PE version puts the



Project in a Box Professional's Status Summary report

two copies of the file out of step, as the original file is uncontrolled. However, PIAB-PE provides a system that incorporates the project name, the document name and the version number in the file name which, when utilised, makes it obvious when someone's using the uncontrolled version. Someone with modify rights can add new documents into management sub-processes and can also remove documents. Documents that exist elsewhere in the system can be inserted into other sub-processes. A wizard is provided to help you build reports. The Project and Stage Summary Information reports are taken from dialog boxes in which project and stage overview details, costs, spend and dates are entered. These dialogs can be updated as the project and its stages progress. They're visible by everyone with project rights and help to keep people informed of the current project situation as well as collecting report data. Log Summary reports contain information extracted from the log summary worksheets.

Project Activity – User Activity reports show, in tabular and bar chart format, the activity of each person on the system, detailing the number of views, checkouts and checkins. In PIAB-PE's next version, now imminent, the facility to specify a time slot and activity relating to a specific file will be included. Another enhancement will enable people with non-standard log spreadsheets to hook cells to the reporting system. Each user has a series of options to control the way their client works. Among these is the ability to specify the local folder where data is stored when retrieved from the server for viewing. Once downloaded, files viewed are stored in a temporary folder and aren't deleted on exit. Over time this could clog up the local hard disk. I think this point needs attention.

Tools

The tools available to system administrators include the ability to create, manage and delete new users, projects and stages and include security, backup and archive functions. Administrators can also export projects. This function takes an entire project and copies it to a server folder from where it can be sent to the location from which it's published. An index front page is created listing all the documents, viewings and notes. In the next version, all the commentaries will be included. This facility can also be used as a backup and as a way of archiving a project at close-down. Currently, if a backup project has to be restored, this must be done by Prosis but, in the January release, a tool will be published that enables users do this and also to import a Community Edition project into PIAB-PE. If you don't want to use one of the supplied templates to create your new

projects, at present the only way to create a new project template is to edit one of the existing (XML) templates (or write a new one!). In the January release there'll be a tool that makes creating your own template that much easier, and this will include the ability to edit the process diagrams.

Another PIAB-PE enhancement due is a financial management tool built into the system. This will probably be in the form of a spreadsheet from which the data can be extracted for reporting purposes.

There'll be three project template versions, PRINCE, Medium PRINCE and Small PRINCE. However, you'll be able to tailor the methodology in any way you want, even to the complete exclusion of PRINCE2.

Despite its imperfections, all of which can be easily fixed, I was impressed by PIAB-PE. It does what it sets out to do and takes a lot of the pain out of PRINCE2.

A new (freely downloadable) version of PIAB is available that enables local authorities to handle e-Capacity projects. The methodology used is the one approved by the appropriate authorities for handling these projects.

Right to reply

We've welcomed this opportunity to have PIAB-PE reviewed by Steve, have appreciated and taken on board his observations and have been delighted by his overall impressions.

We started this business because we felt there were a huge number of project managers in small, mid-size and service businesses who were just not catered for by traditional project management software solutions with their high price, high levels of underused functionality, workflow constraints and implementation/adoption impacts.

The response to our free Community Edition has been great, with over 4,000 users already. Their input heavily informed our approach for the Professional Edition, in particular our decision to make content file-based. This has hugely reduced the traditional adoption and implementation pain as users just attach their existing files into the management framework and share them seamlessly with their colleagues. It's this philosophy that drove the production of logs as spreadsheets and which customers like because they all know how to use Excel and it means they don't have to learn a whole new tool just to contribute to the project!

January sees the new release of PIAB-PE and soon to follow will be our PRINCE2 guidance module with yet more authentic PRINCE2 material licensed from OGC.

What does it cost?

The server and the first single-user licence together cost £50 and you can then network as many other users to the server as you wish. Team licences (which don't include reporting or administrative functions) cost £50 per person. Additional Professional licences (for the full-featured version) cost £250 each. These are perpetual licences which include the first year's support and upgrades. Thereafter, maintenance costs 20% of the cost of the licence per annum. Discounts are given for bulk purchase.

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