

# Project Manager

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# software review 197

## PROJECT in a Box 2.4.1

PROJECT in a box is a British product, designed to apply a British solution. Steve Cotterell puts it through its paces.

PROJECT in a box has been specifically designed to help you manage projects using the PRINCE2 methodology – but can also be used with other methodologies.

Most of us know what a Jack-in-a-box looks like, but how does a PROJECT in a box appear? The answer could be in your hands because, although PROJECT in a box (Piab) has been designed to lead you through a project managed using PRINCE2, other methodology standards, including your own, can be applied.

The system uses either the SQL Server or SQL Express database. The Piab server administration tool can be used as the interface for the free SQL Express system, which is recommended where there are less than 30 users.

There are several versions of the product. As well as the well-known, free, 'Community' edition, there's a server version with a .NET software client. This can be installed onto a PC following a small download, but can also be run from a USB stick on whatever PC it's plugged into.

There's also a 'Run Once' client which, when installed, unpacks into a temporary folder and can be run without owning administrative rights. When closed, it removes itself completely.

On logging in (which can be done via Integrated Windows Access), the system presents a window listing, in its upper section, all of the project portfolios you may access and, below that, the projects in the highlighted portfolio. This window can be set up in various ways and team members may just see a list of projects they can access.

Against each project's name is a field, selected from a drop-down list, that gives information about one of the project's attributes – for example, 'status' (which also shows a RAG indicator) or 'commentary' which shows the text entry made by the project manager. The drop-down list contains the default and applicable project attributes, but the user can create any number of additional attributes.

Double-clicking on any project in the list opens it. The process diagram for this project is then displayed (the system remembers which diagram was open when you last closed this project).

The content of the process diagram is controlled by the methodology template used when creating the project. To navigate around the method diagram, you point to a process step on the diagram and click. Each step can have one of three actions assigned to it: 1) open another process diagram at a lower level; 2) open the 'File Explorer' with the process in context; or 3) as a short cut to a web page or other destination.

Piab is currently shipped with five standard methodology templates: full PRINCE2; Basic P2 (a lighter version with about half the complexity of full PRINCE2); Access P2 (the lightest PRINCE2 model); a proposal management methodology and Agile. Included in the package is a separate 'Method Manager' process design tool, used to personalise and edit existing templates and build new ones. With it, you can create process trees, insert documents, design graphical process flows and set up project attributes.

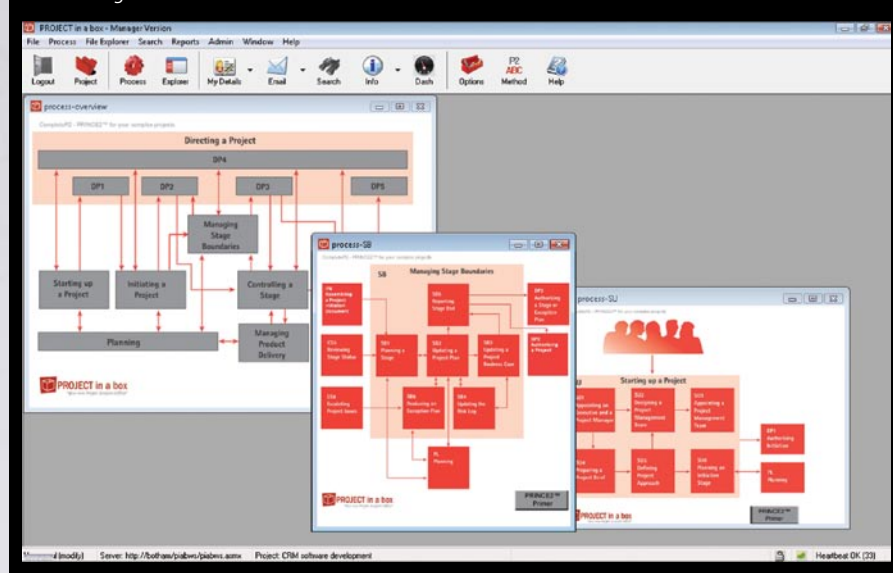
Most process steps contain lists of documents that you should use at that stage. Clicking such a step opens the 'File Explorer' in context. The File Explorer is a folder/file tree containing project and stage-level documents for that process step and specialist documents for the entire project.

Several different icons are used to categorise documents. A red icon indicates a document that's only used in this current project. A white 's' in a blue box shows the document exists in this project and at other locations. A greyed-out, translucent icon indicates a document to which you don't have access rights.

Now, I must clear up a point that could cause confusion. The 'documents' I've so far referred to, using Piab terminology, are actually folders in the folder/file tree, intended to hold files relating to a specific project document. Henceforth I'll call them 'folders' and, if I use the word 'document', it will relate to a specific file.

If you click a folder in the file tree, the right-hand window pane displays the folder information

### Process diagrams



and a tool for adding files to it. You can manage the access permissions, produce an audit report about the files in the folder and arrange for notifications to be sent if files within the folder change. You can also simultaneously email all files within this folder to someone.

If you click a file, its version history can be displayed and you can display any version. To view the file, which will open in read-only mode, you need its native application on the PC. There's a free MS Project viewer available from the Prosis website.

Files can be checked in and out and you can see who currently has them. Files can be checked out locally, or they can be emailed for someone else to work on. When a document's checked out, a red cross appears over its file tree icon. When the file's checked to you, you have a local master copy. Others can view it on the server but can't check it out – it's not returned to the server until you check it in.

When you check out the file, it can be copied to a default 'check out' folder or you can specify where it will be saved. When a file's checked back in, the system only accepts a file with the same name as that checked out. You can add notes to explain why changes were made. You can specify the version increment level that the checked-in document will be accepted as. If you have the authority, you can assign an approved status to the document.

When checking out a document via email, the default option is via Outlook. You can pick its recipient from a custom list and you can add a message and create an Outlook appointment at the same time. The document is then shown as checked out to you.

When you install the client on a PC, a Piab check-in button is added to the Outlook toolbar. When the document's returned by email, you select the message in the inbox and press this button. The attachment's copied from the email and stored in a 'returned from email' folder for later check-in. Documents can be checked in individually or a 'bulk' check-in tool can be used. If you're handling multiple projects simultaneously, this tool will handle check-ins for them all.

For non-Outlook users, an SMTP capability on the server performs a similar function.

You can add files to a folder from a template library (part of your methodology template) or by browsing to them. You can drag files from anywhere in the system and drop them into the File Explorer window. Any file type can be added to a Piab folder.

Folders can be added to the File Explorer tree and can be re-named or deleted. However, once you've tailored a methodology template, you can't save it as a new template.

You can arrange for notifications to be sent to anyone when various events occur (or do not occur). The checking-in of an existing file, the addition of a

new file, new project issues, RFCs and risks could all be notified like this. 'If not checked in by' notifications can be established to send a reminder to someone late checking-in a document.

You can search the entire project for keywords and file names. If the search finds anything in a document that you can't access, it's not included in the results list.

Permissions can be set on each folder and at project level. Only people with administrator rights can alter other people's permissions. Groups can be established and group rights allocated. There are four permission levels: no access, read, read/write and modify (can administer the project and modify its structure).

At folder level, you can specify the rights of each group for each folder and these rights override the project rights.

Administrators can view anybody's records and see the full audit log detail. They can search for codes and filter by date and range and can crop and clear the log using a separate server administration tool. When a completed project is archived, the audit log isn't archived with it.

At the top of the Piab window is a menu bar featuring a set of buttons.

Project assurance at a detailed level is managed by recording all of the system Web Service requests. By clicking the 'Recent Activity' button, each user can access their personal activity record for the past three months, with details of the processes and file versions involved.

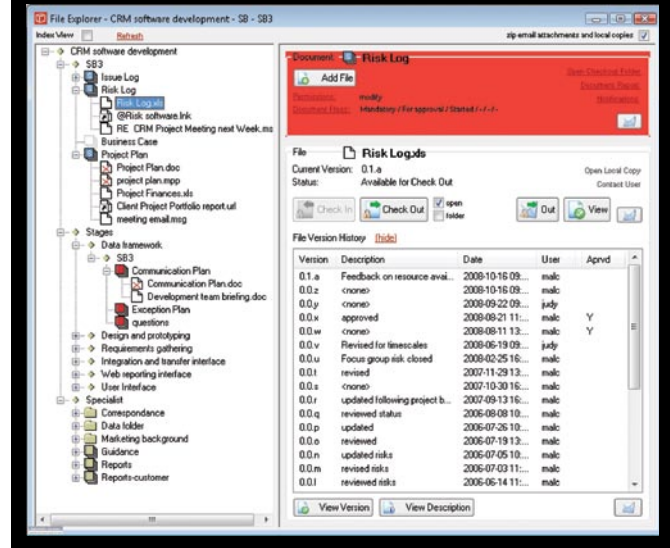
The 'Recent Files' button gives click-on access to the files you've worked on recently and 'Checked-out Files' displays a list of the files currently checked out to you. You can manage checking back in from here.

Personal contact details are found beneath the 'Info' button, which displays a list of other system users. Highlighting a name reveals the contact information for that person. In various places in the system (for example, beside the name of a person who's checked a file out) there's a 'Contact User' link. Click that and you come to this list, with that person's name selected.

Under the 'Options' button, you can cause the system to display the checked-out files list as a reminder when you exit Piab. You can also define the file-naming convention to be used when viewing or checking out files. This can be set at the server level so that users have no choice here but, if this isn't done, users can devise their own naming convention.

By hitting the 'Email' button, you can send a non-document specific email to your project team or to individuals.

The File Explorer window



Pressing F1 produces normal application help. Pressing F2 accesses the PRINCE2 methodology 'Guidance Module' which is provided free with the Personal Version (£25 with the Community Edition). The Server Version costs £25 per user. It contains the fundamental principles and information needs, with links to further information, as well as large chunks (about 25%) of the PRINCE2 manual as an aide-memoire.

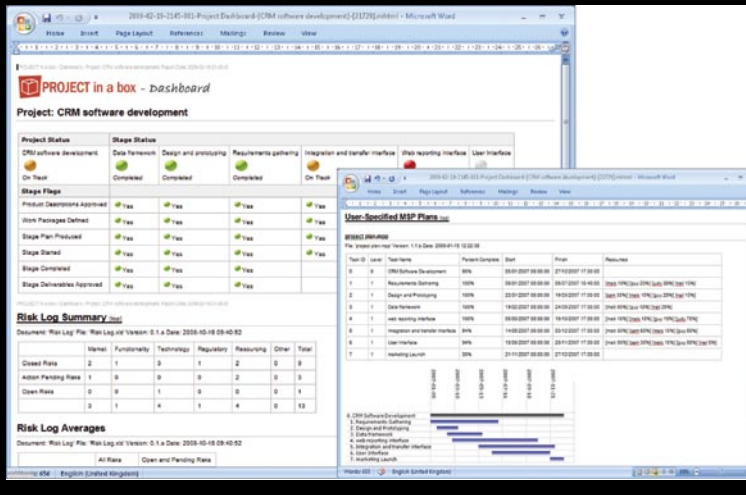
For all versions other than the Community Edition, Guidance Modules are also available for the Access P2, Basic P2 and Proposal Preparation methodologies. The Guidance Modules are searchable and can be edited using Microsoft's HTML Help Editor.

Piab's Risk Log is a locked-down Excel template. Some areas (eg, description) are free text. Probability is a defined percentage range and other columns (category, impact, proximity) contain structured data chosen from pick lists. When a project is created, the project manager defines the contents of such pick lists. Once done, the spreadsheet is locked so that these tables can't be changed. Some organisations define these look-ups in the methodology template and disallow any editing. There are optional fields for costs and delays if the risks occur and columns for countermeasures, owners, authors and status (another customised pick list). The risk rating is automatically calculated from the data entered in the other fields.

A 'Risk Summary' tab produces a bar chart analysis report. This doesn't carry a key, so it's not altogether clear what it means. A risk rating spread chart and reports about risk budgets can also be produced.

When producing reports, various sources of information are used: the server log's audit trail information, files stored within the project – the standard project controls and any optional ones the user adds – including risks, issues and quality logs and the project plan. Prosis supplies templates for all these standard controls. The majority are in Excel but the project plan can come from MS Project or Excel. Planning data can also be drawn





from MS EPM or Project Server. Data from any application that can produce MPP files (2003 or 2007 versions) or 2003 XML format and OpenProj (an open source application with a MS Project look and feel) files can also be used.

Any other project-based source of Excel data can be used. This can't be rolled up to portfolio level whereas the standard controls data can.

Other sources of reporting information include a 'Summary Information Form' and 'Highlight' reports, which allow project managers to write commentaries and supply manual status information. This can be done at project and stage levels and additional data fields can be added to facilitate the collection of extra information.

In version three, the availability of external data sources will be increased and there will be a reporting module that brings data in from spreadsheets and enables cutting, dicing and data manipulation.

Any user can see reports that have been published but only those with 'Manager' licences and 'Modify' security level can produce them.

When produced, the system places report files into a report folder (the default is My documents/ Piab - but you can change that). You can choose whether to time/date stamp files in their titles. If you switch this option off, each new report will overwrite the previous report of that type - keeping only the latest.

Once you've produced a report, you can click a 'publish report' link, rename the report file and add a description. In your File Explorer 'Specialist Products' area, there's an automatically generated 'Reports' folder - you can add others. You can choose in which of these folders to save the file. You can set different permissions for each report folder and use notifications to tell people when new reports are ready for them.

The system includes a reports menu with a list with ten report types (mostly wizard-based). Piab's default reporting formats are HTML and Word.

The 'Dashboard' report shows the project status

plus a range of project controls. Senior executives can have the system configured so that, when they open a Piab project, they automatically see the Dashboard. This report's appearance and the graphics used can be customised.

If produced in HTML format, the Portfolio report has

drill-down to project information functionality and you can select which projects and which data elements to include. This detailed report gives much useful information about the portfolio and the projects in it.

The Enterprise Hub, Piab's Ajax-based browser interface, offers another way of accessing the same information, subject to the same security levels. Its interface is entirely brandable and needn't show

'Project in a Box' anywhere. Because it's browser-based, its functionality is also accessible via a phone.

To the left of the screen is your project list and, on the right, the 'Summary Information' for the project highlighted on the left. A reports tab lets you see the published reports that you have access to, drillable where applicable.

Other functionality offered replicates many of those accessed in the software client, in some cases with a reduced function set. One purpose of this interface is to allow access to the data away from your office. Another is to give users outside the core project team (like senior management or customers) access to data applicable to them.

Other features include the production of some reports, access to Piab's document management system, the viewing of project team information and the ability to contact them.

Because Enterprise Hub is Web Services-based, there already exists a full API for integration with other Web Services-based applications, which include SharePoint and MS EPM. The Piab browser interface can be run seamlessly as a set of separate pages within SharePoint and EPM systems.

## Right to reply

*It is now over three years since Steve reviewed the first version of PROJECT in a box and comparing these it is pleasing to see how much PROJECT in a box has matured. Steve's review highlights this in three main areas.*

*Firstly, the methodology flexibility. We now help organisations deliver consistency in authentic PRINCE2, MSP and Atern and, perhaps more importantly, in their own personalised and bespoke methodologies all of which are under their control.*

*Secondly, the completion of effective report creation and communication tools including the easy-to-use browser interface which is helping many project and programme managers get their message across.*

*Last, but not least, are the audiences we now serve. Community Edition has become a standard used by well over 30,000 users in 150 countries and our commercial packages are used by individuals and teams alike in 800 companies over 25 countries.*

*Our positioning of PROJECT in a box as a highly cost-effective out-of-the-box solution capable of serving a lone PM or a corporate PSO and able to be personalised by the customer, sees us very well placed to satisfy the more focused purchasing sentiments which have returned to the market.*

*Malcolm West, MBA, BEng, MAPM, Managing Director, Prosis Solutions Ltd*

## How much does it cost?

The Community Edition is free. The Personal Version (one user account on one machine) costs £99. The Server licence costs £500 plus £300 per manager and £75 per team member. View only Enterprise Hub users cost £10 each. These are all one-off prices that include the first year's support and upgrades (the Personal Version only includes three months). Thereafter, support costs 20% per annum. MSP templates are also available at £1,000 for multi-user system and £250 for the Personal Version. All prices exclude VAT.

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