PROJECT in a box Version 3.01

PROJECT in a box continues to develop, adding functionality as it goes. Steve Cotterell reports upon the latest version of its ‘Enterprise Edition’

A template-driven, methodology-led project management solution that can be tailored to your organisation’s own requirements.

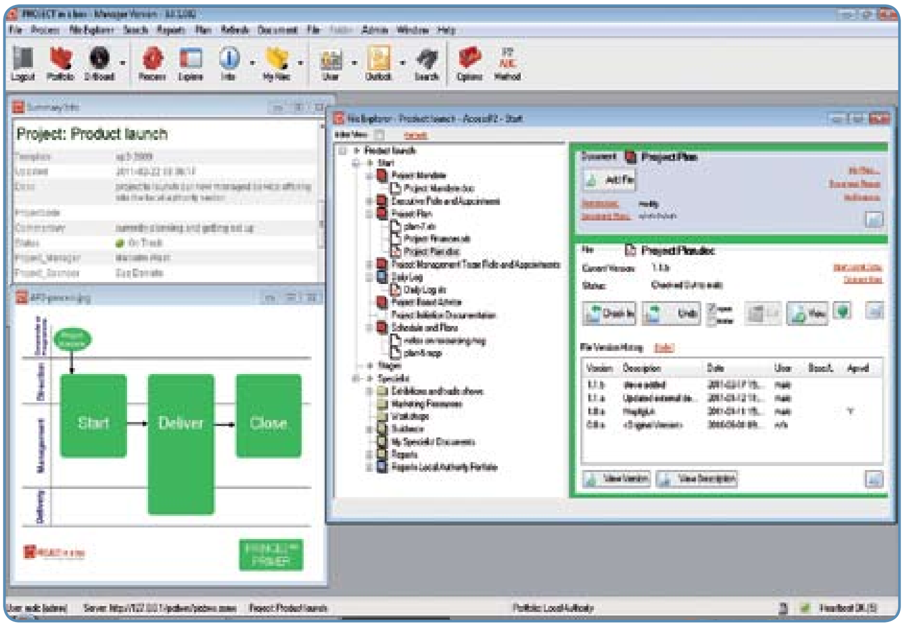
A Jack-in-a box is designed to give you a surprise. PROJECT in a box (PIAB) helps avoid surprises. By enabling you to manage your project using pre-designed templates utilising the experience of others and proven methodologies, it gives you the reassurance that you’re navigating well-trodden paths.

This isn’t the first time that I’ve reviewed PIAB. In the past, I’ve looked at the free, single-user ‘Community Edition’ that, to date, has been distributed to more than 65,000 people. This review concentrates on the current version of the web-based multi-user ‘Enterprise Edition’, released last December, containing many new functions, including planning and resource management.

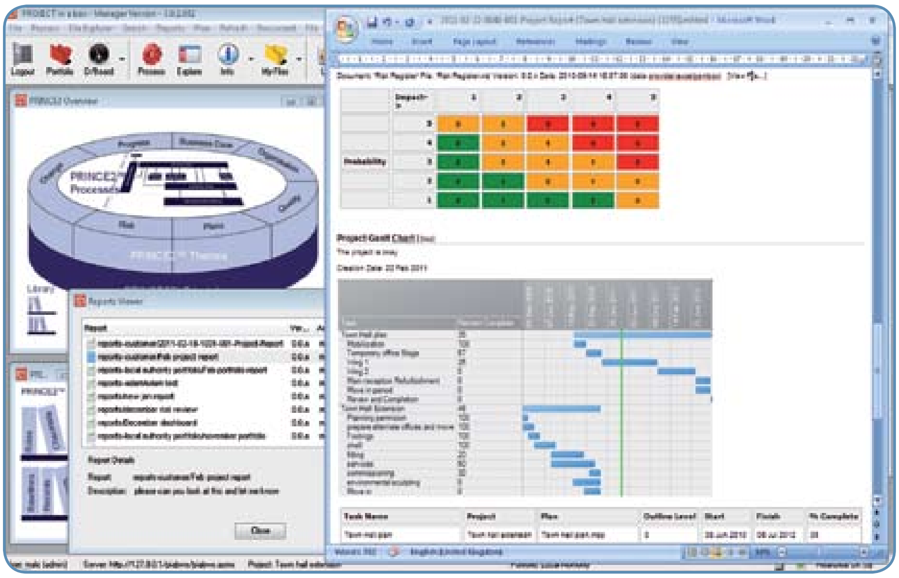
This release is available in both software client and browser interface versions. Most people, especially system administrators and project managers, use the software client and that’s what I’ll concentrate on here, with just the occasional reference to the browser version when appropriate.

PIAB runs from a central server built around Microsoft standards (most customers host their own but Prosis can host it for you). Users connect to this server, via Web service interfaces, and run the software client in the same way as with traditional software. As the client is a .NET application it can sit on a desktop without installation or it can be run from a memory stick. It can be remotely installed on networked machines.

As no plug-ins are required, the browser version will work in all browsers and will style itself to suit the browser in which it’s running. It has no administrative functionality, nor all the features of the software client, but it does provide the normal day-to-day working features.



A process map with File Explorer.



One of a set of configurable reports.

Smart integration

The browser version can be accessed via Smartphones and iPads and integrated into SharePoint. It has an API that enables its integration with other applications, which isn't done that often because the software client interacts with other desktop software more effectively.

Mac users can't use the software client but they can use the browser version, which can also be used to access PIAB on a pc without the software client installed.

Having logged on to the software client you see a list of the projects you're working on, which can be grouped into portfolios. The areas you can access and the things you can do are controlled by PIAB's security features - you can do nothing without the appropriate permission. Portfolios can be set up for any group of projects and a project can be added to any number of portfolios.

A 'method' is a defined set of documents that you work through, step-by-step. Each project is built using a method template, stored within PIAB. When the project is created, a copy of the appropriate template is made and this is then fleshed out and/or amended as appropriate.

Out-of-the-box templates are available for both the 2009 and 2005 PRINCE2 versions. There are two lighter PRINCE2 interpretations for use with less complex projects. MSP, DSDM Atern (Agile), Sales Support and Lessons Learned templates are also included.

The 'Small Team' package (see below) doesn't include the MSP template.

New methods can be created and existing methods edited using the administrator only 'Method Manager' tool. Each method contains a list of template documents, a list of files that are to be used in each process and the process navigation diagrams (images held as jpg files). An administrator can see all the methods held on the server, download the one to edit and, when done, return it to the server.

To create a new project, you select the method to use. This might be a standard template or a customised or in-house method that your organisation has added to the system. You give the project a name and hit 'Create Project'.

It now appears in your list of projects but, at this point it's only visible to you. It may need tailoring before you invite others to work on it.

If you open it, you see a graphical representation of the methodology used. This takes the form of a process diagram with each step labelled. To open a step, you click its label. This can take you to a list of template documents, to a specific address (such as a web page) or down to a lower level navigation diagram.

All the project documents are held in the same database area but, as you view different method steps in the process map, only those documents relevant to that step are displayed. Wherever a document is shown, in whichever set, it is the same document and not one of a set of copies. By selecting the 'Index View' you see a list of all the documents arranged alphabetically, making it easier to locate a specific one. As part of the tailoring process, a manager can remove a document from a process step or from the project entirely. Additional documents can be added to process steps from anywhere in the project, or from anywhere on the server as a 'live share', which can then be available to several different projects simultaneously. Using this facility a programme schedule could be viewed in all its constituent projects.

The PIAB 'File Explorer' window contains an expandable and collapsible file tree view and an area that shows detail about a highlighted file or document, the current file version and the version history (which can be hidden).

Double-clicking a document on the tree opens it in its native application. This is a copy of the original, which hasn't itself been checked out. You can't edit this copy and save it back as a new version of the same document, but you can save it elsewhere. Any file (including e-mails) can be dragged from anywhere on your system and added to a project document. Every new document or document version added to a project is indexed by the system. This index is searchable.

Checking out and emailing on

Files can be checked out, either for you to work on or to be e-mailed to someone else for them to work on. Such a file is then stored in your own 'Check out' folder or attached to the e-mail. The file tree icon is marked with a red cross to show that it's been checked out and the information window of File Explorer shows who has it. If you e-mailed it, it's still checked out to you and you're responsible for checking it back in.

The server copy of a checked out file can still be viewed, but not worked on, by others. As the checked out document is held locally, you can work on it without being connected to the server. When the document is checked back in, it is given a new version number (you choose the version number level) and the copy is deleted from your local folder. Previous versions of a document can be viewed, but not checked out or edited.

Should you wish to check a document back in unchanged, an 'Undo' button returns it to the state it was in prior to your check out. A 'File Explorer' button produces the URL of the current file version, which can be passed to someone else to enable them to view it.

Complete documents or individual files, including historical versions, can be e-mailed from PIAB using Outlook or SMTP technology, which enables other systems to be used. When sending via Outlook, a document can be sent with an e-mail, an appointment or a task.

If using the SMTP system, you tell PIAB the recipient's name and the files to be sent. PIAB then sends the e-mail, copying it to your home e-mail address.

When checked out documents are sent via Outlook, a return recognition code is embedded into the e-mail. On the document's return, an Outlook plug-in is used to redirect that document into your 'Returns' folder from where you can check it back in. When a number of documents are being returned, a 'Bulk Returns' button brings them all in simultaneously. When Outlook isn't in use, returned files are

PROJECT in a box's customisable Dashboard.

dragged from the e-mail attachment to your check out folder and then checked back in as if they'd been checked out locally.

Using PIAB's notification system, you can create sets of rules that issue notifications when a certain set of circumstances have or have not been met. A notification can be configured to send an e-mail containing a link when a document is checked in, or isn't checked in by a specific date. People being notified just get one e-mail a day containing all the notifications due on that day (neat!). You can specify when notifications should not be sent, for example weekends, bank holidays and so on.

Each method has a 'template library' attached where templates that may be required additionally to those that form the original method template are stored - blank letterheads, PowerPoint master slides etc.

Where reference is needed, from within a project, to an object that isn't owned by that project – for example a corporate policy document - a URL or file path linking to that document can be added to the File Explorer tree. Such links can also be embedded into the method template.

An audit trail is kept of physical changes to document content alongside a list of all user activity on the system. Each user can see their own activity list and the administrator can see everyone's. This list can be filtered by activities to show who has done what during specific periods.

The browser version opens by offering similar project and portfolio lists. The File Explorer screen works in much the same way. All e-mails sent via the browser use SMTP as there's no interaction with Outlook.

Files can be viewed but, when they're checked out, you must specify where to save them. When you check them back in, you must remember where they were saved. You also need to delete your local copies.

One of the information sources used for reporting purposes is the 'Project Summary' form, completed by the project manager. This contains text entry fields such as project description and status. User-defined and project specific fields can be added and all can be displayed in reports. The system also uses user activity data, physical files held within the project (such as spreadsheets) and these three sources of information can be merged to produce a series of reports.

Highlight and stage reports can be produced. The risk, issue and quality logs have standard, out-of-the-box reports based on them and a finance template is available, information from which (including budgets, costs and actuals) can be reported on.

A new, customisable reporting system lets you use information from any spreadsheets stored within the system. There are some project and portfolio level standard reports and your data can be processed and formatted as you wish.

Planning information can be extracted from MS Project and Project Server, Excel, Primavera and Asta applications and included in reports via database to database connection, meaning that not all the planning sources have to be held within the PIAB project.

HTML reports, which can contain drillable hyperlinks connecting to the documentary data, can be produced. The data can also be sent to Word, where it can be edited and saved in document format.

Assurance and quality control reports can be produced. For example, a report about a document can show where it's being used, what permissions there are, its version history, the user activity, what notifications are set up on it and whether they have been triggered.

At the project level, a similar report can be run on all the project documents in either HTML or spreadsheet format. A similar report can be produced for multiple projects. This is useful for illustrating the status of the project documents, for cross-project analysis and for filtering. A 'What's Changed' report shows the portfolio or project changes during a specified period.

A 'Report Viewer' lets you list and view reports, which can be published and can become part of the project documentation. A notification, advising of a report's existence, can be issued.

The ability to include bar charts, pie charts and meter graphs in reports is under development and should be available this summer.

Users of the browser-based version are also able to produce and view reports.

Task and resource planning information is loaded, at task level, from the plan into PIAB's central database. Once set up, this happens automatically each time the file's checked in. Excel, MS Project and PIAB's own new planning tool (more later) can all be used.

Resource names from imported plans can be mapped to the PIAB user names.

'My Tasks' lists can be produced as either listing or Gantt charts, which can be filtered and sorted. Items in the list can be clicked for more information. It would be useful to be able to save your Gantt chart format once you've defined it. At present you can't, although you can save the list format.

The basic project Gantt (without dependencies) can also be displayed. If there's more than one project plan, they can be merged into this Gantt.

A project resource chart, filtered by named resources, can be displayed. You can specify the time period and time intervals represented by the bars on this chart. Hover your cursor over any point on the chart and a box containing that area's source data opens.

The data from these charts can be exported for analysis in a spreadsheet. Where this becomes useful is when it's used at portfolio level, pulling in the plans for all (or groups of) projects and examining the overall resource usage.

Resourcing data can't be edited in PIAB, but must be done in the planning application.

If a business as usual and annual leave booking spreadsheet is set up, this data can also be read into PIAB and considered alongside the project planning data.

Notifications can be set to highlight tasks with imminent start dates or late finishing. Browser users just get the 'My Task' list, not the Gantt or resource charts.

Customisable dashboards and simple planning

Each user can set up their own Dashboard, which can be given a house style, to show in window 'panes', a selection of system information. Each pane is drillable through to the full information behind it.

PIAB's new simple planning tool (available as a free download) lets you load planning data directly into PIAB without using a third-party scheduling tool. The top area of the screen contains a Gantt chart and below that is a task list. You can display a single data item beside the task's name on the Gantt, but all the task data can be shown on the task list.

Summary tasks can be collapsed and expanded and finish to start links (with lags) can be entered. Tasks with a zero duration are shown as diamonds, a way of recording milestones. The critical path isn't identified and the appearance of bars and text isn't customisable.

You can allocate task resources and progress can be tracked. Individual tasks or the complete Gantt can be copied and pasted into other documents or e-mails. Individual tasks can be copied and pasted within the chart. Tasks can be moved up and down the list.

PROJECT in a box
"Your own Project Support Office"

Right to Reply

A comprehensive review from Steve who has hit the nail on the head, PIAB is designed to avoid surprises, and it does what it says on the box.

We find most customers are seeking consistency both in methodology or approach and in data collection and monitoring to support reporting and that is what PROJECT in a box gives them. Traditionally our customers have been interested in the standard methodology templates and reports we provided around PRINCE2, Agile, MSP etc. but increasingly customers want these as a base for tailoring the methods they apply to the needs of their organisation, culture and the technical domains they work in. We provide the tools to enable them to do it themselves or we can do it for them, depending on their confidence, budget and time constraints.

With version 3.0 we have extended this approach into planning, resourcing and task management as well as the ability to support different user interface languages in our uniquely practical way which supports the hard working project teams without constraining them. The combination of practical yet innovative capabilities and modest pricing is proving very desirable to Blue Chips, PMOs, SMEs and small teams in many market sectors globally.

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How much does it cost?

The Server Licence costs £4000. Each user licence is extra: Manager – £400, Team User – £100, View Only – £15. A 'National Package' allowing unlimited usage by a single organisation in one country costs £25,000. The Small Team Edition (two managers, nine Team members and ten View Only) costs £999. The Community Edition is still free. All prices exclude VAT.

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