

Project in a Box version 4.0.1

Steve Cotterell revisits an application that he's known for many years and is pleased with the way it's developed.

I first reviewed Project in a Box (PIAB) in 2005. Since then it's been a pleasure to watch it grow into the world class system it is today, with a global community of users. There are several versions of the product and this review covers the identical functionality set found in the Small Team and Enterprise Editions.

PIAB is a client server system. You connect to a central server using either a software server or the browser-based client interface. Both use Web Services, both work over the Internet and both support Windows Single Sign-on or you can log in with a user name and password.

What you then see depends upon who you are. The out-of-the-box software server system opens onto lists of your portfolios and projects. The portfolios list occupies the top half of the screen. Highlight a portfolio and your projects are listed in the screen's lower half. Columns display whatever data about those projects you've elected to display, drawn from the project metadata (name, status, commentary and other manually entered project data), data from the project controls database (start and end dates etc.) and data

loaded by the system from spreadsheets held by your PIAB system. This list can be ordered by the data in any column.

When you select the project to work on, the "Method Template" associated with that project opens. Nine templates are included in the out-of-the-box version of PIAB. Two optional templates (official PRINCE2 and MSP) cost extra.

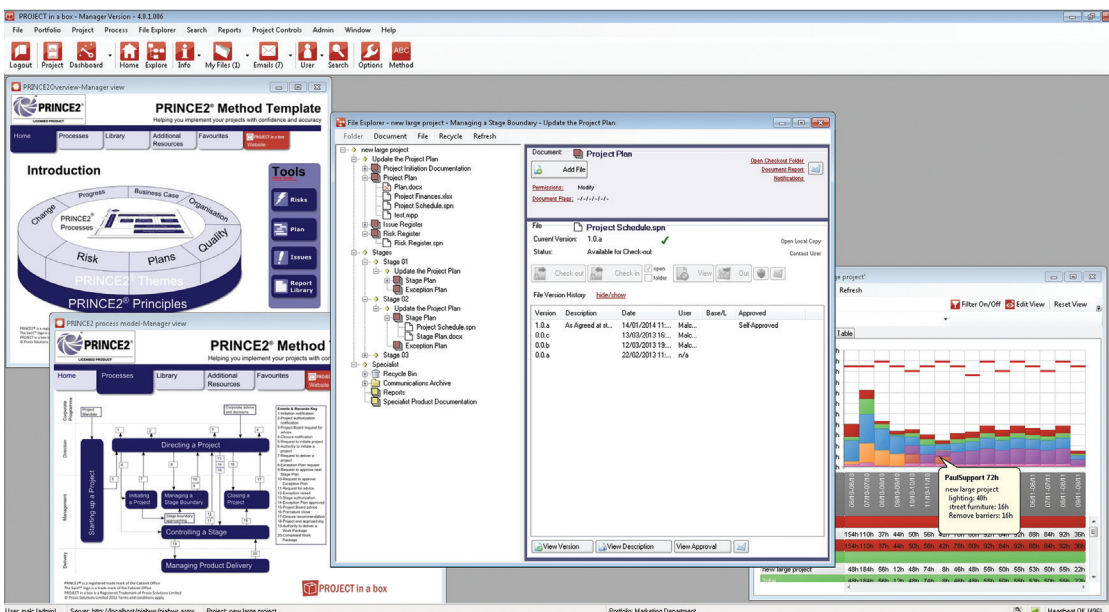
Among the included templates is a family of scaled generic methods, for use depending upon the project complexity (which use PRINCE2 templates and terminology where possible), a DSDM Atern (Agile) method, a sales method for use with tender responses and a PMO best practice method.

The Method Template defines the type of project to be delivered, guiding you through the processes and documentation involved.

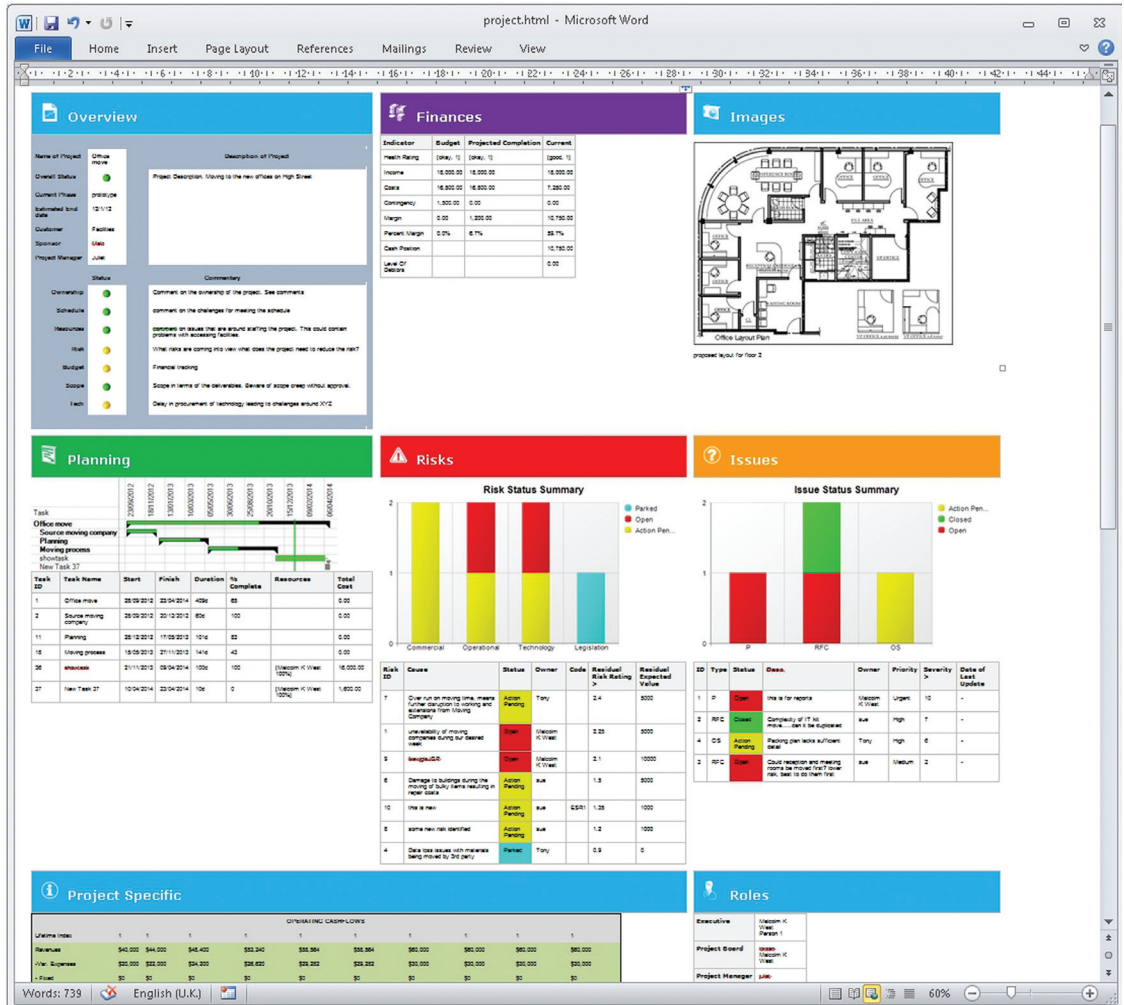
Almost everything you do in PIAB is controlled by your permission level. Project managers control their project's permissions, at project, stage and document levels, by assigning people to "Permission Groups". These



An enterprise project management system specifically designed to help with the navigation of projects through their chosen methodologies, but with many additional useful features.



The method navigation screen showing the File Explorer



groups are defined at template level but are editable and managers can create new groups if required.

When you create a new project, the template sets up the project documentation, the report data and project controls sources and the project permission profiles. New to this version is the introduction of a customisable method navigation system based upon a set of predefined rules (such as role, size of project and language) that displays those navigation options appropriate to the circumstances.

The four navigation options are: 1) to display (in a "File Explorer" window) documents appropriate to the process step, 2) to offer a more detailed selection of navigation steps - used in more complex projects, 3) to take the user out of the PIAB system to connect with something else such as the intranet, a company policy document or an external website and 4) shortcuts to other parts of the system.

In PIAB terminology, a document can consist of a number of files - in PRINCE2 terms a PIAB "document" can be regarded as a management product containing a set of related files - in other words a "document" is a folder with a specific purpose.

Having created your new project and assigned it to the appropriate portfolio, it appears in your project list. On opening the File Explorer you find that some empty documents have been provided. These remind you about, and act as storage repositories for, necessary documentary evidence that can't be templated, such as minutes of meetings, emails and the customer's order.

Any type of file can be held in a document, including Outlook messages and plans held in MS Project or Prosis Planner (their free project planning application). Additional files can be added to the File Explorer by dragging and dropping them from another application. They then become system managed files, available from within the PIAB system. When you click to view a file, it opens in its native application, which must be available to the local machine.

At the project start, only the basic templates appear but, as the document set is completed and added to, so the list of displayed documents grows. As the project progresses, documents no longer required are hidden. Although full version control is exercised throughout the document system, only the current version of any file is shown in the list, although previous versions can be accessed if necessary.

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To edit a file, a standard check-out/check-in system is used. When a file's checked out it's placed into a predefined folder where it can be worked on and saved before it's checked back in. When a file's checked out, it can be viewed by others but not worked on. The file's data remains available to the system.

PIAB has a system for adding additional properties to Word and Excel files. This enables pieces of information to be stored by the system and injected into Word documents or Excel spreadsheets - for example start and end dates, security classifications, sponsor details, etc. These additional properties can automatically be drawn from fields completed by the project manager at project start-up and from elsewhere.

Only the person who checked a file out can check it back in. When you check a file in, the system ensures that it has the same name as a file you previously checked out, preventing you from checking a file into the wrong project. Comments can be added when files are checked in. By default, the last part of the file's numbering convention is updated for version control, but you can override this. If you have permission, you can self approve files but there's also a more complex approval process.

You can set up approval paths, requesting approval of a file from a number of people. They can read the file, see its history and who else is voting on it. There's an area to discuss the file with the originator and the other approvers. Approval changes can trigger notifications (see later) and the approval history is saved with the file.

Once checked in, the file's deleted from your local folder and the file history and audit trail are updated. Older versions of the file can be viewed but not checked out or altered.

Some files, such as a project plan, risk, issue and quality registers and finance spreadsheets are automatically used to update the system when checked in.

A system can be established whereby an email is sent if a file's added to a document. This could be used to check that the correct file, such as the customer's order, has been placed in the right document. You can also tailor the navigation display so that no future stages are displayed until an authorised person gives permission for this to happen.

Other document level notifications can be set up to issue an email when anything happens to a document or a warning if nothing happens to a document by a specific date and time.

You can edit your project's structure at any point in its lifecycle. You can, for example, add stages or work packages to it. These can be standardised, templated stages available through PIAB or you can exercise free rein. Templated stages can be changed, with alterations made to the documents required.

Any deleted part of the project structure is placed in a recycle bin and can be restored later if required.

Documents and files can be renamed, moved or shared between several process locations. It's also possible to share documents between different projects. If one of these projects is deleted, the shared documents remain live in the other project(s).

A "Lessons Learned" library consolidates files containing lessons learned from historical projects and, even after these projects have been deleted, the files remain accessible through the library. The system indexes all the files in a project and can search the project for a file name or keywords.

When the project is created, the template specifies which files certain project information is extracted from. These might be MS Project, Planner, Excel or Primavera transfer files, containing scheduling, risk and issue data. The data is extracted from these files automatically and saved in PIAB's project control database.

These files can be created by the Method Template when the project's created and later used by their native applications to update the information or, if the external project plan was created before the PIAB project, then that external file would be added to the File Explorer document and the system subsequently told to use data from it.

It's possible to link a number of plans to the project control database which allows you to utilise both your master plan and sub-contractors' and suppliers' plans, displaying all the information in one view.

You can select which "data range" you view, for instance all the tasks in a particular portfolio, all of your projects or just your tasks in a single project. To these datasets, you can apply filters to achieve specific views of the data such as overdue, overspending or unresourced tasks. There's a standard set of views and you can create your own filters. This concept of creating views of data slices is the basis of PIAB's reporting function, dealt with later.

When displaying PIAB's Gantt, and having defined which selection of tasks to display, you can select which pre-saved view to use. These views can be customised and new views created.

You can select what data to display and how to sort and filter it. The Gantt can be switched off, creating a tabular display when, for example, producing costing views.

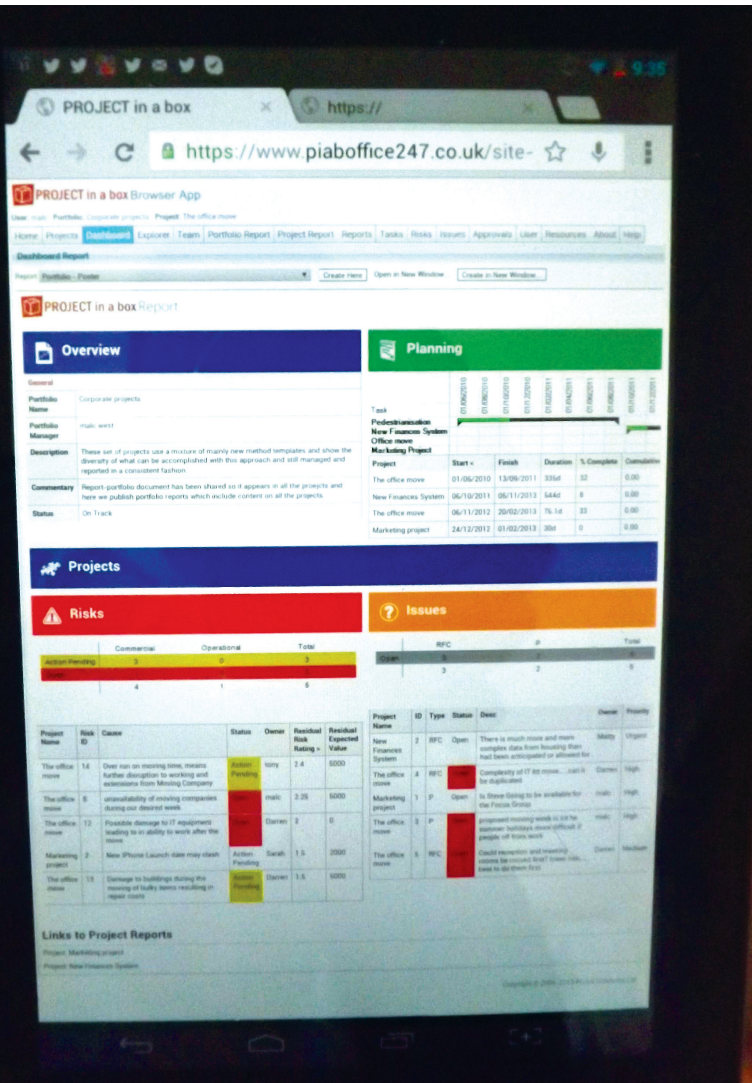
Views can be created covering risks, issues and resource profiles using a similar set of controls. Risk views will show the total number of risks, the individual risks and the responses.

When displaying data in a view, clicking on any item enables you to drill down to the information source.

Once a view's been created, it can be saved, exported as a CSV file and copied to the clipboard and pasted into Excel.

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The browser-based version, displayed on a tablet device.



PIAB's ability to import data from many sources and combine it into a set of highly configurable views makes the reporting function of PIAB extremely powerful

You can produce graphical stretched bar charts, risk rating spreads and risk distribution matrices and these can be copied to the dashboard and pasted into other applications.

Wherever the project schedule comes from, the resource data is imported into PIAB with the other information and thus enables the production of a resource demand view. This can be filtered and sorted to show individual and team profiles over portfolios, projects and system wide. This view can't be used to adjust resource usage - to change things you must use your scheduling system.

PIAB's ability to import data from many sources and combine it into a set of highly configurable views makes the reporting function of PIAB extremely powerful.

PIAB's reporting system can utilise all the data held in views and can also access the system's audit trail and data held on external spreadsheets (such as costing information), some of which may have been created by the template and some may have been added since. You add the spreadsheet files to the system in the same way as planning files were previously added.

Spreadsheet data can be added as a table, as an image or as project properties. What's imported from a specific spreadsheet, and where it's used, can be defined in the Method Template - another powerful feature.

Reports are run from PIAB's reporting menu. A set of predefined reports is available or a wizard can be run to collect your specifications for a new report. Predefined reports can be edited and the new version is saved as a new report. When creating a report, you specify what data you want to show and define how you want it displayed.

When selecting data, you can extract it from an existing view or you can create a new view to use. Quality assurance and user activity can be brought in from the audit trail.

You then choose from a predefined list of report templates that control the appearance (logos, colours, layout, etc.) of the report. New templates can be added and existing templates edited.

Reports are, by default, created in HTML format, but Word and other formats can be used.

Comprehensive, detailed and informative reports can be run and saved for global, project or personal use.

Among the standard reports is a "glitzy" poster report, focussed on the needs of project sponsors and showing high-level information which can be optimised for the audience.

At portfolio level, individual reports for each project can be produced, with the data held in them being consolidated into portfolio reports, filtering and summarising all the project information or predefined data selections.

Any report can be used to feed a dashboard. Dashboards may be used by senior personnel as their entry screen into the system and configured to give snapshots of the high-level project and portfolio information needed by the managers involved. They also give project managers a quick way to access, produce and edit reports in Word.

Portfolios can be defined as specific sets of named projects or projects selected because they match a set of rules that you define. For example you can create a portfolio containing projects with more than x open issues, budgets over £x, with new issues or overdue or a combination of any other criteria. The content of this portfolio may then change each time it's manually re-run.

In addition to notifications of file and document changes, you can create notifications, based on a set of rules, that create an email containing specified information. For example, you could set up a daily email containing a list of open issues with a severity level of greater than x or of overdue tasks. These notifications can be based on any risk, issue or task data. You can specify who should receive such notifications which

can be scheduled to run pre-defined intervals. Sets of notifications are combined into a single email.

A browser-based, browser independent (no plug-ins or apps required) PIAB version is available. It's HTML-based and so can be restyled if wished. It provides simple day-to-day access to your projects. You can't create projects and there are no admin functions.

It opens onto a list of your portfolios and projects and displays their properties. You can view your lists of tasks, risks and issues and filter these as you wish and, against a selected portfolio or project, run any of your pre-saved reports. There's limited report customisation functionality but reports created in this version can be saved back to the main application.

Normal document access is provided via File Explorer and you can check files out and work on them provided you have the necessary tools on your device. New files can be added and there's full search functionality.

Approval responses can be actioned in this version.

In both versions you can list team members and contact them by email (using your default email system).

How much does it cost?

Small Team Edition - 2 Manager, 6 Team and 12 View only users - £999

Up to an additional 15 users can be added to this edition (at the standard price per user quoted below) before upgrade to the Enterprise Edition is required.

PRINCE2 Method Template - for use with Small Team Edition - £100

MSP Method Template - for use with Small Team Edition - £500

Hosting service in line with PIAB service level agreement per six month period £500

Enterprise Edition - Server licence - including Method Manager, Gold services pack & MSP or PRINCE2 Method Template - £4,000

Manager user licence - £300 per user; team user licence - £150 per user; view only user licence - £25 per user.

Unlimited use of Enterprise Edition in one country £30,000

Hosting service in line with PIAB service level agreement per six month period - £500

Other Editions available are: **Personal Edition** - £99

Community Edition - free **Planner** - free

PRINCE2 Method Template - for use with above Editions - £25

MSP® Method Template - for use with above Editions - £75

All prices exclude VAT.

Right to Reply

PIAB has been through a significant transition in the last few years and Steve has picked this up well. Helping customers embed methodology and governance processes is still very much at the heart of what our tools are all about. The new features in this area continue our market leading position with eleven pre-defined methods now available and the unique ability for customers to create as many more of their own as they require. What is more remarkable though is the delivery of analysis, reporting, dashboard and notification/collaboration capabilities to match, such that many customers now purchase predominantly for these capabilities rather than the methodology aspects.

Our focus on the customer's needs has resulted in the Small Team pricing giving unparalleled capability for under £1,000 with tools and materials to support self implementation, making corporate capability available to even small organisations. At the same time with our Enterprise Edition pricing we are supporting national and global implementations with marquee names providing the full range of training, consultative assistance and personalisation that is expected by such organisations. Across both these markets our free Planner tool is becoming the planning, risk, issue and cost management tool of choice.

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