



Project Manager

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software review 186

Project Progress 3.5

Three years ago,
Steve Cotterell didn't see a
future for this application.
Now he's changed his mind.

A Web-based application designed to help programme and project managers apply the PRINCE2 methodology when planning and managing their projects

I admit it. I was wrong. When I reviewed Project Progress for *Project Manager Today* in July 2005, I stated that my overall impression of the product was that it wasn't finished. What was there worked well, but there were several issues needing resolution and much more work needed doing. However, in my heart of hearts, I doubted that either the product, or the company would survive.

And that's where I made my mistake. The company ditched the original product and did a tremendous amount of work (at least I was right about that) to re-design and re-engineer it from the ground up. This must have cost a fortune – but what they now have is a useful application that helps programme and project managers use the PRINCE2 methodology to run their projects.

To date, the sales effort has focused on the public sector. The product is being used by the London Borough of Southwark, other local authorities, South London and Maudsley NHS Trust and The British Council. Private-sector customers include BT and Land Rover.

The version I reviewed is due for release this month. The application is provided on a Software as a Service (SaaS) basis and runs within Microsoft Internet Explorer. It requires no locally installed software and leaves a zero footprint on the machine used. The review system was quite slow in places. I was told that this was because, for the screens in question, there was a lot of data being processed but a server upgrade may possibly be required.

On logging in with your username and password, you arrive at your Homepage which can be personalised with a company logo, which is then printed on all the documents that the system generates. Along the top of the screen is a set of navigation links such as 'My Programmes', 'My Projects' and 'My Documents'. Below that, along with your photo and profile information, are lists of your projects and programmes and of items such as approval tasks and team requests that require your attention. If you click on any item in any list, you go directly to that part of the system.

Clicking the 'My Programmes' menu link or the programme link on the Homepage takes you to a list of your programmes detailing some basic information about each programme, including a RAG traffic light symbol showing its time, cost and quality status. Your security level controls what programmes and projects you can see.

There's a 'Create Programme' wizard that helps you to set up a new programme. You name it, enter its description, start and end dates, cost and tolerance information and the currency used – just the symbol, it doesn't convert between currencies. The tolerance figures are the amounts (in cash or days) of plus or minus variation of the actual costs and dates against the planned costs and dates that are ignored before the system reports a problem. If you could enter a default cost tolerance figure

as a percentage of the budget, maybe via the administration feature, this could be useful and would certainly save some typing.

The new programme appears in your list of programmes and, if you click on it there, you immediately go to its Programme Summary page. This features two ingenious 'clock face' dials that illustrate the percentage of the cost tolerance used up and the percentage variation of the budget versus the actual cost of the programme. If a tolerance figure is exceeded, the glass of the appropriate dial cracks. It's a gimmick, but it's clever and I like it. Planned and actual dates and budgets are detailed and also shown on the page are lists of the top programme and project issues and risks and of all the projects in the programme. Along the top of the screen are buttons enabling you to go to the risk, issues and daily logs.

Similar summary screens featuring dials are available at project and stage levels.

Costing a programme

When calculating the cost of a programme, you can assign an independent cost to the programme itself in addition to the total cost of the projects in the programme. This could represent, for example, the cost of a programme manager. You can, if necessary, change this figure as the programme progresses.

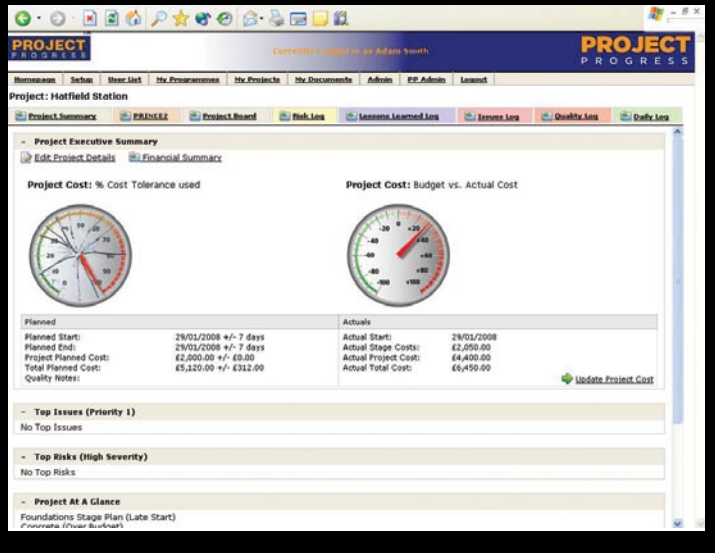
The way the application's costing system works is that each level of the programme (programme, project, stage, work package and product) has its own, independent cost. The total cost of any level is therefore the independent cost of that level plus the total of the cost of all the components of all the levels below it.

If, from the 'My Programmes' page, you click on the name of a programme, all of the projects in that programme are listed. Traffic lights show the time, cost and quality status of each project. A 'Create a Project' wizard helps you set up a new project. You enter the basic project information (description, dates, budget, tolerances, etc) and, if there is one, attach the Project Mandate file. You can attach the project to a specific programme.

You're then taken, by the wizard, through the process of appointing a project executive and a project manager. You then create the project management team. From a list of the people in your team, you select individuals and assign them to their PRINCE2 roles. When you click on a 'Confirm Appointments' button, emails are sent to the project team members advising them of their appointment. A 'Project Board' screen shows, graphically, details of the construction of your Project Board and the overall management team.

In the 'My Team Requests' list on each of these individual's Homepage, an entry for your project now appears. They can accept or reject the request. Once the entire team have accepted their roles, the project executive or project manager (or

A Project Summary page – all is not well!



Once the SU and IP stages have been completed you can see how much it has cost to get to that point. If you open a 'Pre-Project Financial Summary' screen, you're shown a list of the budget and the actual cost figures of all of the products up to the end of the IP stage.

The next step in the process is to create project stages. You return to the PRINCE2 diagram and click in the 'Managing Stage Boundaries' area between the IP and CP stages. A dialogue box opens in which you can firstly request stage end approval for the SU and IP stages and then plan a new stage.

Having first created the stage plan, you then create a new product by uploading or entering its product description and entering its dates, costs and so on. This would be the real work that the project was set up to perform. You create as many new products as necessary in this stage. You then create one or more work packages and specify which products you want included in each. You can attach 'Execution Plan' files, which could be Word documents, planning schedule files or other documents.

The person assigned each work package gets an email asking them to accept it. Once accepted, they can't edit the package details but can update the actions. On the PRINCE2 screen you will now see that the details of this stage appear as part of the workflow. You continue in the same way, creating all of the stages necessary for the completion of the project's work.

To enter progress details against work package products, from the PRINCE2 screen you open the particular stage screen and from there you can open the stage control screens carrying their own sets of dials and links to the work packages and products. You can add independent stage costs via this screen.

This application doesn't include a Gantt chart. Being such a familiar and widely used planning tool, I think that the inclusion of a Gantt chart would make navigation around the stages and products within a project very much easier. I also think that it could be used to considerably simplify the process of entering progress information and/

another nominated person) approves the Board.

If you now switch to the system's PRINCE2 view, you can see a graphical representation of the project's PRINCE2 workflow, and where you've reached along it. At the moment this chart will show just three 'administrative' stages: SU (Starting Up a Project), IP (Initiating a Project) and CP (Closing a Project). Between the IP and CP stages there's an arrow labelled 'Managing Stage Boundaries'. We'll come back to this point later.

Each of the first two stages contains six red boxes, each representing a different management product. If you've not started work on a particular management product, the box representing it carries a grey flag. This flag's yellow if work has started but hasn't been finished and approved and green if it has been. If work on the product hasn't started and the planned starting date's passed, the flag's red.

If you click on the next management product symbol (in this example the first three are complete, so the next is 'Prepare a Project Brief'), you're taken to the screen where you can start working on it. You review the input (which, in this case, is the Project Mandate file that you've already attached during the project setup process). You assign any costs to this part of the project and name the product owner. You then upload a prepared document or a template. Organizations need to set up their own template libraries. The 'My Documents' button is used to add templates into the system and you can also list and view the documents attached to each of the projects that you have access to.

You can now review the Brief and request approval when it's complete. While you're working on it, you can update its cost, quality notes and percentage complete controls as necessary. When it's complete, you can request approval and, once approved, update the controls and record its completion.

At any time, you can visit the Quality Log, which is updated automatically, in which all of the

products and their status are detailed.

As you progress through the workflow, the system tells you what inputs you should review for each new product. You then work on your template to produce the final document and follow the same approval process in every case.

On each project's Homepage is a 'Project at a Glance' feature that lists the project's products and tells you about their status, a 'Project Directory' list of users and a list of the project documents that have so far been attached to the system.

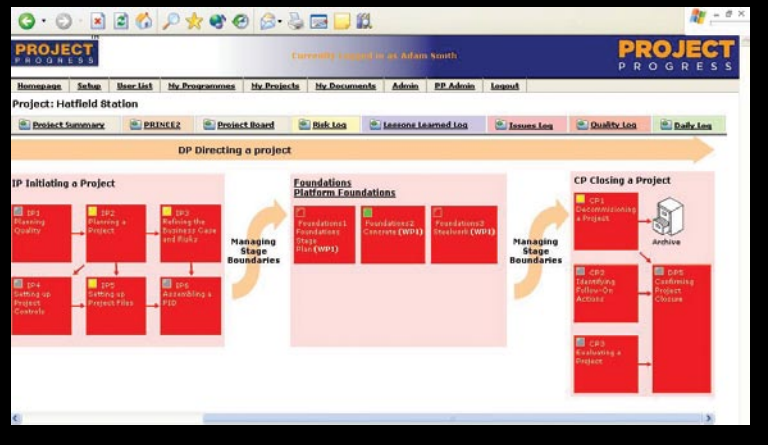
Logs and filters

Issues and risks logs are held and can be added to at both programme and project levels. All of the logs – risks, issues, lessons learned and the daily log – work in much the same way. To add an issue, enter information about it into the required set of PRINCE2 fields. If an issue's target completion date has passed, then the traffic light signal in the system's issues lists turns red.

The Issue Log report can be filtered and displayed and exported in both PDF and Excel format.

All of the log filters can be customised, named and saved and, if necessary, edited later. You can also customise the layout of the list in the report, specifying which fields are to be included in it.

The PRINCE2 view



The Quality Log

The screenshot shows the 'Quality Log' section of the Project Progress software. It displays three tables of project data:

Product	Approver	Planned Sign Off	Actual Sign Off	Result
SU1	Adam Smith - Approved	29/01/2008 +/- 7 days	29/01/2008	Complete
SU2	Adam Smith - Approved	29/01/2008 +/- 7 days	29/01/2008	Complete
SU3	Adam Smith - Approved	29/01/2008 +/- 7 days	29/01/2008	Complete
SU4	Adam Smith - Approved	29/01/2008 +/- 7 days	29/01/2008	Complete
SU5	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet

Product	Approver	Planned Sign Off	Actual Sign Off	Result
IP1	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet
IP2	Not Assigned	11/02/2008 +/- 7 days	Not Signed Off	Not Completed Yet
IP3	Not Assigned	11/02/2008 +/- 7 days	Not Signed Off	Not Completed Yet
IP4	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet
IP5	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet
IP6	Not Assigned	11/02/2008 +/- 7 days	Not Signed Off	Not Completed Yet
IP7	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet
IP8	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet

Product	Product Name	Approver	Planned Sign Off	Actual Sign Off	Result
Foundations1	Foundations Stage Plan	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet
Foundations2	Concrete	Adam Smith - Approved	29/01/2008 +/- 7 days	29/01/2008	Complete
Foundations3	Steelwork	Not Assigned	Not Planned +/- 0 days	Not Signed Off	Not Completed Yet

Both open and closed projects can be archived. Archived projects can be un-archived and work continued on projects that were not originally closed. Closed projects can be re-opened.

As far as future Project Progress development is concerned, the big plan is to modularise the product so that customers only get and pay for those parts of the system that they actually want. For example, a basic user might only want access to the issues and risks logs. Other plans include adding Monte Carlo simulation functionality to the risk register.

In 2005, I didn't see any future for Project Progress but now I have no hesitation in endorsing it's place on the shortlist of any organization wanting to implement a PRINCE2 project management system.

Steve Cotterell

or requesting approval on completion which is, at present, achieved via the stage control screen or the Quality Log.

Once all of the products in a work package have been completed then that is signed off and approved too.

The Project Directory contains a list of all the users of the system and can be used to add users to specific projects. Once they've been added, the project becomes visible to them and they acquire full data entry and editing rights for every part of the project. An audit trail is kept that records who did what and when, throughout the system. The administration function enables you to add new users to the system and to edit the information held about them.

There is a way of linking Project Progress users from other organizations into your system and hence they can be added as users to specific projects. I expect that this feature is likely to be considered far more useful in the public services arena than in the commercial world. I think it doubtful that commercial organizations would want to give their suppliers or clients access to all of the privileged information that they would then be able to see. The security implications involved in this feature are likely to be addressed in a future release.

Once all the project work's been completed, the workflow proceeds to the PRINCE2 CP stage and the products are handled in the same way as those belonging to the other PRINCE2 stages. At the end of the project, The Project Financial summary screen details the budget and actual cost figures of each part of the project – broken down component by component.

Right to reply

Steve Cotterell is absolutely right; Project Progress has come along way since it was reviewed in 2005. Our original vision was always to bring PRINCE2 to life and simplify its integration and therefore its adoption. We believe we have finally achieved this with the latest release of Project Progress which now incorporates Managing Successful Programmes.

We were the first company to bring Software as a Service to the project management software market and our initial offering, reviewed in 2005, had to overcome many barriers and scepticism surrounding Web-based solutions. How things have changed as more and more organizations will now only consider a Web-based project management solution.

A new development for Project Progress this year is offering solutions in a modular format, enabling our customers to only pay for software that they actually use.

We've proven that we're no flash in the pan, and we haven't by any means finished. End to end MSP, Risk and Issue collaborator and the financial modelling of risk are just some of the modules currently planned for release in 2008. We listen to our customers and have continually developed solutions that exceed their expectations.

During April and May potential customers can trial the service for free for 60 days.

Adam Smith, CEO, Project Progress Ltd

How much does it cost?

The Risk Manager edition, comprising of just the issue and risk capture and logging functionality, costs £4.95 per user per month. The Team Edition costs £16.50 per user per month for a 12-month contract for a minimum of five users and the Professional Edition is priced at £50 per user per month. All prices exclude VAT.

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