ProjectObjects 8

ProjectObjects is a flexible web-based project portfolio management system from Ireland. **Steve Cotterell** puts it through its paces.

A modular web-based project portfolio management system that is highly user-configurable.

Founded in Ireland in 2006, the Project Objects Company remains headquartered there, and has offices in the UK, Italy and India. The company also has a presence in North and South America. ProjectObjects, their project portfolio management software solution is web-based with no client software to be downloaded and is compatible with all popular browsers. The interface is available in English, French, Italian, Portuguese and Spanish.

It is modular software, with the various modules oriented to different organisational roles and clients can purchase just the modules they need. The system is fully configurable to the client's needs, but this review is based upon the out-of-the-box configuration.

The users' entry point, their Home Page, is configured with a default dashboard when first opened apart from a menu bar at the top of the screen. The users, who can control how the page is configured and displayed, are left to design their page from a set of supplied widgets. It typically displays a dashboard showing the information required by the user's role.

To select and add widgets to your page, you click the "Edit" button. The list of available widgets is updated as new ones are devised. Your new dashboard can be saved and thereafter used as your home page. All users can set up multiple dashboards displayed beneath tabs at the top of the screen.

Dashboards can be layered so that clicking a hyperlink in one sends you to another containing more detailed information about that topic.

Data displayed in dashboards can be sorted and filtered on attributes and custom attributes can be set up. Filters can't be saved (Project Objects hopes to add this later).

Once a filter's been applied, it's retained as you drill down to lower data levels. This is useful in some circumstances but not in others.

All dashboards are personal but can be published to specific people or groups, giving them permanent access to it. Although configurable by users, the system can be locked so that certain roles can only see predefined dashboards showing preselected information.
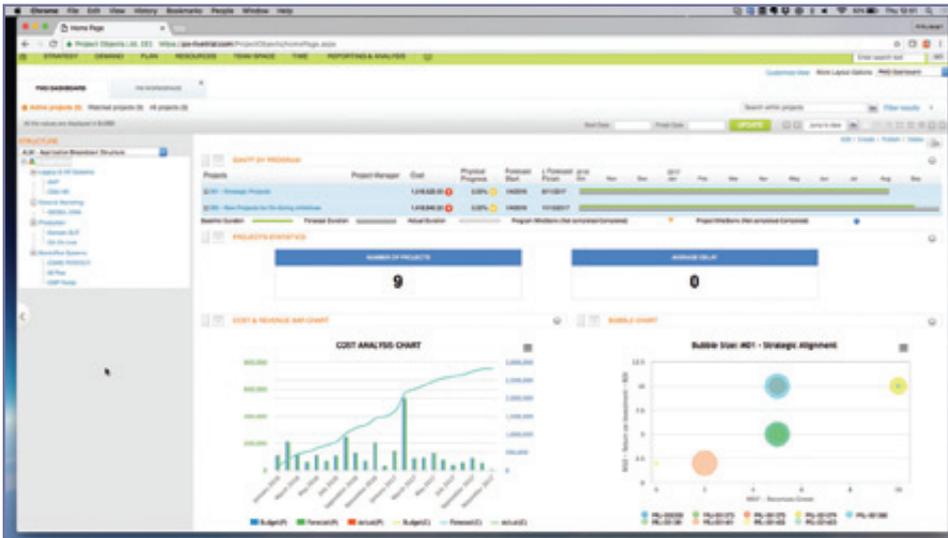
When starting a new project, you have the option of using the Demand Module, which has two sub-modules, "Requests", in which you can initiate all of the processes managed within ProjectObjects, and "Project Requests".

Opening the Request sub-module, you see a filterable and groupable list of outstanding requests. Individual requests can be viewed and edited and bulk editing and deletion functions are available.

This module is used to capture and organise ideas, new initiatives or potential activities to approve and start. If the request is validated, the approver can convert it into one of a number of different objects: an action, issue, risk, change, document, ticket or project request, defining the type of project to be created.

The second sub-module, "Project Requests" is used to estimate potential projects. An approval process guided by a configurable workflow can be used to validate and initiate new organisation projects. When creating a Project Request, you enter information about the proposed project, including estimates of work and budget required and adding explanatory comments. Subsequently, anyone can add comments to requests. The approver may request further information from the originator and may then validate or reject the request.

A Dashboard.

The Planning Module (the core module) is where you manage projects and programmes and initially displays a list of links of your projects. Hover the cursor over the link to your new project and a menu appears leading to a group of actions you may take according to your permissions. You can edit the existing details, manage the stage gates, create a milestone plan, create a copy, save the project as a template and apply a template to the existing project. You can also assign breakdown structures to the project, set the currency and hourly labour rates, version the project and manage its calendar (the organisation calendar is applied when the project's created but this can be edited to become the project calendar).
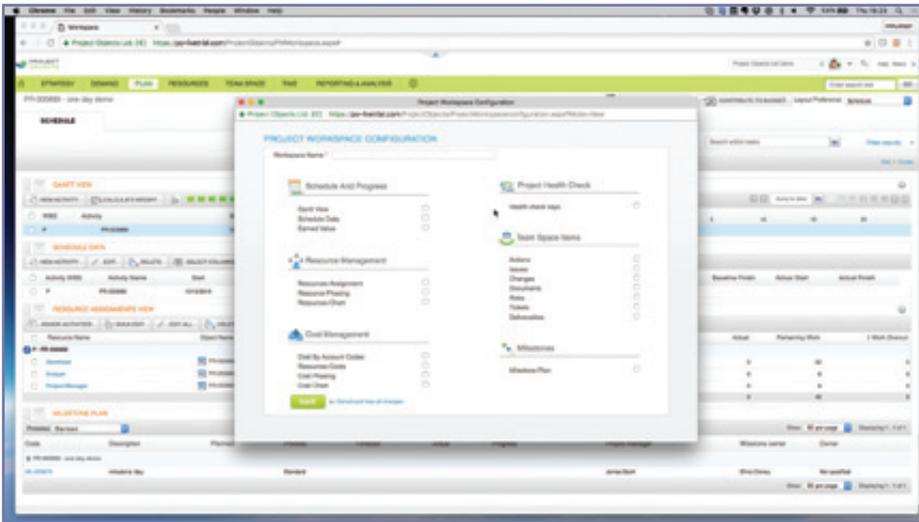
You can enter progress, set the "Time Now" (a reference date for reporting) and configure Stage Gates and permissions. In a "Settings" area you can control the behaviour you want to assign to the project, for example, by setting the number of hours in a working day and how you want to weight each task in the overall project progress. You can also define the workflows that you want to use for risks, issues, actions, changes and tickets.

Opening the Project Request (which can be edited) you can define who will be the project manager (who is informed by email). You can associate a team with the request and you can add resources individually from the pool that your department has access to. You can link departments so that senior managers can access the resources of all departments they may access.

Costs and benefits are set using lists of cost and revenue account codes, tailored to your organisation.

The Strategy Module also contains two sub-modules, "Strategies", which lets you plan long term (three to five years) strategies, targets and budgets. The second sub-module is the "Portfolio" management area. Here you can set portfolio budgets and create what-if scenarios to optimise the content of your portfolio. Switching to this area, you see a list of your organisation's portfolios (groups of projects and project requests). Select one and you're shown a list of metrics (criteria used to rank the project requests) and constraints (targets set by the organisation). The metrics are used to give a score, with some metrics carrying more weight than others in their importance.

Each project request is scored and ranked by priority. Once all the projects and project requests in a portfolio have been scored, you can run an "Optimiser" which ranks the projects and indicates whether it seems advisable to continue with each or not, based on the rules you've laid down. What-if scenarios can be saved for future reference and comparison with one another. A range of bubble and bar charts is available to assist with scenario comparison.

The verification model previously added to your project request is a checklist of steps to be taken before the project may proceed. When all steps have been completed by the team, the project request is ready for conversion into a project. You then "Release" the project request which removes it from the project request list and creates a project using the data held. You can also create a new project from here without going through the request process.

Select "Planning" from the menu and you enter the widget equipped workspace which you can populate with a set of tabs, each containing a set of widgets. Widgets are available to handle resource and cost management, progress scheduling, milestones, project health checks and team space items. There's no limit to the number of pages you can build but Project Objects recommends no more than five. I think this is a beautifully easy way to configure your own workspace.

To add activities to your project, you can use the Gantt View or the Gantt Editor. The Gantt View shows a list of activities in which you can create new activities but no predecessors, successors or constraints can be added here. The Gantt Editor gives full drag-and-drop Gantt creation functionality and you can also enter data via the keyboard. You can't split tasks, but sections of the chart can be cut/copied and pasted and you can change bar colours. Activities can be indented and multiple undos can be performed (up to the last save). Multiple baselines can be saved and the baseline can be displayed, as can the critical path.

If the workspace includes the Gantt view and you select a task in that Gantt, information displayed in the other widgets on that page focusses on that task. A neat feature.

The Workspace Configuration Dialogue Box

The Resource Module has two sub-modules. The first "Explorer" lets you see resource assignments against projects and the resource availability details. You can move resources between projects and delay activities to optimise resource usage. The second module, Work Planner, is a visual assignment scheduler which lets you capture all assignments, business as usual, maintenance and ticket work and lets the resource manager take decisions about an individual's work and define a resource's priorities.

Resources are assigned using a pop-up menu. Right-click an activity and then "Assign Resources". Detailed information about the resources available to you is displayed with information about their current loading and availability. To assign a resource to the task (both named and generic) you click its checkbox.

Clicking the "Resource" menu gives you more detailed information about the resources' other assignments and their loading.

To replace a resource on a task, click the resource's name and then "Replace" from the drop-down that appears. You're shown a list of resources and their availability from which to make a selection. It would be good if, recognising the skill set of the person to be replaced, the system offered only people with similar skills as replacements rather than all resources as currently.

If the replacement resource has the availability to do the full amount of work remaining, then that's what they're assigned to. If they have less availability remaining then they're assigned just enough work to bring them up to 100%, with the balance remaining for you to assign to someone else.

As resources and other costs are assigned to the project, the labour rates already entered are used to calculate project costs and these are compared to the saved cost baselines.

You can import the schedule, assignments, baselines and activities from a Microsoft Project 2010 or later MPP file (Project Objects are working on the latest version). The Gantt chart can be exported to a PDF file (in single page or multi-page, portrait or landscape format) in which you can set the resolution and define the data range.

Once the schedule's been created and resourced, the project can be baselined and you change the project status to open.

In organisations where the project manager has to assign resources generically and then request named resources from the resource manager, this functionality is available.

The Resource, Resource Assignment and Resource Availability views give resource managers detailed information about the resources they are responsible for. Similar editing functionality is available here as the other resource areas. New this year is a Gantt style view showing all the (project and non-project) assignments for a named resource. This chart can be used to make decisions about the priority of work where different work has been assigned to that person during the same period.

The Timesheet Module is then used to collect information about actuals. Details of project and non-project activities and non-working hours can be collected. Timesheets can be routed for approval and hours can be posted to the schedule when submitted or when approved and two levels of approval can be configured. Rules can be written to validate time entered on the timesheet.

The costs can be collected either by direct entry of the information into the system or by a Web Services interface with other legacy financial systems.

In the standard configuration, each project stage concludes with a stage gate. It's possible to reconfigure the system, changing the rules applied at the end of a stage or removing gates altogether. Automatic notifications can be issued when a project passes through a gate or such passage is rejected.

The Team Space module lets you manage documents, actions, changes, risks, issues, discussions and tickets. Here you can customise the necessary forms, documents and workflows to your needs.

"Project Analyser", the first of the two "Reporting and Analysis" sub-modules, is an online reporting engine for project information. The "Reports" sub-module contains about fifteen out-of-the-box, non-editable reports and a further thirty or so customisable reports. Reports can be produced in PDF, text or Excel formats and every view in the system can be printed via your browser.

Resource Assignment and Availability
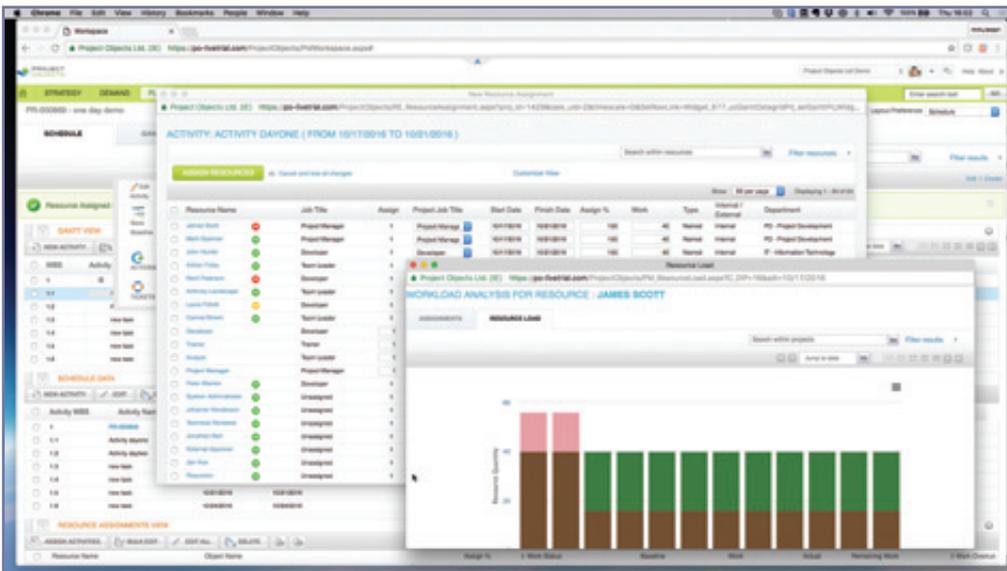
You can set up an "Enterprise Breakdown Structure" under which you can create a set of categories, for example which budget projects are charged against. Subsequently in dashboards and reports, the projects can be filtered against that structure. You can create multiple breakdown structures and different levels of filtering applying different sets of attributes nested within each other. Numeric information held within the structure is rolled up and totalled according to the filters used,

A program manager's workspace can be built giving similar functionality to the project workspace but with rolled up information covering all projects in the programme and allowing drill-down functionality to the projects. On this Gantt, dependencies can be created between projects. Links can be created with projects in other programs and between activities in different projects.

The "Admin" Module is used by the system administrator and nominated users to set and control rights and security, codes, rules, breakdown structures, stage gates and templates and perform other system configuration operations. The "Business Process Manager" lets you define new forms for information collection, workflows and email notification models, creating new processes to meet organisational needs.

How much does it cost?

There are two ways in which ProjectObjects can be purchased, on-premise and cloud.

The one-off Perpetual Licence cost per user for the on-premise version depends on the roles of the users. They are: Executives: $800, PMO: $1400, Project Managers: $1000 and Team Members: $340. There is a 20% yearly maintenance charge.

The monthly charge per named user for the cloud version is: Executives: $35, PMO: $55, Project Managers: $45 and Team Members: $15.

All prices are in US Dollars and exclude VAT.

Right to Reply

A good and inclusive review of ProjectObjects 8 which highlights the software capabilities, especially in terms of functional coverage and work areas self-configuration. Along with the execution of solid and comprehensive Project and Portfolio processes, we believe that providing insight on results and flexibility on how they are presented, give to the users the confidence of doing the right job. Our Roadmap is oriented to improve consolidated processes like resource assignments or program management and increase at the same time the capabilities to configure process forms, workflows, dashboards and advanced reports. As the Author is focusing at the end of the article, we give to the organizations the tools for implementing their own business processes without any need of customization and vendor participation through our business processes management module. We like to keep it simple and satisfy our customer needs. Therefore, we listen to them with the aim to deliver easy to use and surprising user experience in our software quarter releases. Next year we will make ProjectObjects truly available on any devices other than PCs for tasks, timesheets, team collaboration, KPIs, etc. Once again, simplicity and completeness will drive us to the pursuit of the customer satisfaction!

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