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## The Goal

agement, enterprise software deployment and, specifically, Collaborative Project Management platforms will provide valuable input that will help in the process of evaluating and/or implementing Project Management systems.

The Project Management Institute ([www.pmi.org](http://www.pmi.org)) is the single best source for information on Project management. Their goal is to educate and certify people on project management methodology.

The goal of this publication is to educate the readers on Collaborative Project Management tools, not on Project Management. These tools have requirements beyond small or Enterprise Project Management tools since it requires multiple companies with different project management philosophies to participate on a project with a minimal amount of disruption and training.

## Next Issue

### Discussion Topic:

Generation of a Schedule. The functions in a Project Management Tool that provide quick and efficient processes for creating a project either from scratch or by modeling it after a similar project.

### Review:

Microsoft Project 2002 -- a huge step forward for Microsoft, who has added some real collaborative Project Management Tools.

## Collaborative Project Management Tool Requirements

The requirements of a Collaborative Project Management tool are dependant on many factors – there is no definitive list. A set of basic functions for project scheduling packages can be easily defined, but the goal of this publication is to discuss the functionality beyond a project scheduling package and explore the needs of a collaborative system.

Not all the features discussed will be appropriate for every organization. For example, some organizations may be highly disciplined or have external workflow applications and the project management tool may not need to supply that type of control.

Other organizations may consist of occasional or external users not accustomed to

the project management methodologies for the project and strict workflows and processes need to be enforced by the project management system.

Figure 1. Advanced Requirements, enumerates some of the requirements that should be looked for in a Project Management tool that can greatly improve the usability it.

In the upcoming issues the first section of this newsletter will be devoted to further discussion of these requirements. If your organization needs a requirements analysis performed for your project management tools, please feel free to contact eCameron at any time.

## This Issue's Review – As-One

### Product: As-One

### Version Reviewed: Version 5.0

As-One is a no frills collaborative project management tool. The product focuses on providing the desired amount of information to the product's user. The company provides an excellent amount of documentation and a 15-day free online trial from their website.

The first impression of the product is that it is strongly geared toward documentation and "soft deliverables". It provides all the basic functions of a complete project management tool plus rigorous control of:

- Non-scheduled activities -- Change Controls, Risks, Action Items, Discrepancies, Events, etc.,
- Documentation -- project plans, specifications, etc.,
- "Soft deliverables" -- Functional Specifications, software modules, etc.,
- Project and corporate knowledge base items -- Coding standards, best practices.

All items are under strong configuration control.

The product integrates with desktop project scheduling packages via MPX files or directly with Project 2000 (Project 2002 is in the works).

Its primary functional strong points are:

- 1) The "Start Page" is extremely powerful. Any user can configure their initial screen to be one of eighteen different pages in the system. Some of the more popular choices include:
  - a) "My Workplace", which can be configured to show all responsibilities for the user on all projects for which that user is associated,
  - b) "Project", an executive overview of the projects for an organization and their high level status.
  - c) "Project Summary", a portal-by-project to explore as much detail about the project as one would like.
  - d) Other start pages will allow you to open As-One to pages summarizing Risks, Tasks, Actions, Events, Discrepancies, Change Logs and more.

- 2) As-One has a complete set of tools to track non-scheduled activities in a project. This allows users to enter and track nearly any type of activity in the project. An activity may be classified as an Action Item, a Change, a Discrepancy, a Discussion, an Event (i.e. meeting) or a Risk. Many of these items (i.e. discrepancies or risks) have associated state machines providing workflow control to ensure these items get handled properly.  
Each activity may be associated with one or more tasks, documents or other non-scheduled activity giving the user a maximum amount of flexibility in applying them to the project.
- 3) As-One maintains an excellent Knowledge Base for the project. From the first access to the demo, one cannot help but be impressed with the extensive Knowledge Base look and feel. Meeting minutes, deliverables, standards, action items, etc. are all tightly controlled and easily accessible for review or action.
- 4) Work Products are the mechanism to describe and track items resulting from the project. Describing items as Work Products provides for easy method of tracking of both formal and informal deliverables. This concept makes As-One an ideal tool for projects whose primary deliverables "soft deliverables".
- 5) Integration with Microsoft Project, and other MPX capable products is good. When integrating with an MPX capable product, users can add, delete and modify tasks on the As-One platform and update an offline plan or vice versa.  
In the Microsoft Project 2000 mode, users add and delete tasks offline updating the online plan later. Project participants modify task status online. In either mode, users do not require licenses of Microsoft Project unless they plan to manipulate the schedule offline.
- 6) The company is very open and forward

Projects Templates	Project templates must provide more than a list of tasks and their relationships. A template should provide the ability to clone a project, its risks, deliverables, template documents and allow easy substitution of contributors based on their role in the project.
User Specific Views	<p><u>Executive:</u> Executives should be able to access a portal page that displays the programs and projects they are responsible for or projects that affect them. They should be able to quickly see project status based on schedule, cost, profit and risk. They should not be required to dig into the details of a project. They should also see escalated action items.</p> <p><u>Project Manager:</u> Project Managers need an "at a glance" view for his or her projects to determine who or what needs help. Nearly due and late Action Items, Tasks, Change Requests, etc. must all be highlighted to avert any possible delays in the project.</p> <p><u>Individual Contributor:</u> Individual contributors need a "what do I need to do today" look at their project(s). What is waiting for them should be only "one click" away.</p> <p><u>Administrator:</u> Pending project administration tasks such as creating and archiving projects, resources or knowledge base items, synchronizing external data stores (i.e. an external resource databases) should be tracked and the administrator alerted to ensure continued and proper system administration.</p>
Issue Tracking	Issue tracking should allow for classification, tracking, escalation, and routing of issues on a project. These issues should minimally include tracking risks, discrepancies, change requests and action items.
Document Workflow	Document routing should allow for canned and ad hoc routing lists. Participants in the routing should be able to reject the workflow at any point to any point in the past, add comments to the routing, modify (with configuration control) any attached documents and delegate their authority. Routing participants should be a resource or a group (i.e. Document Control). Starting and finishing a workflow should be able to automatically start or finish a task.
Process Workflow	Workflows for items such as change controls should be able to be dynamically determined based on predefined parameters on the workflow. For instance, based on the monetary or schedule impact, different approvals could be required. Detailed instructions for an organization's processing (Document Control check-in process) should be able to be entered into the system.
Reuse	Reusing previous schedules and documents for new and similar projects is not only a time saving tool, but it is also a very effective method to enforce project standards and minimize errors in generating projects. Complete project reuse will allow the cloning of a project (via a template), its risks, actions, change requests, etc. to create a "knowledge loaded" project.
Knowledge Base	A knowledge base of current and past documentation, including company standards, program and project documents, deliverables, risk statements, change requests should be maintained in a configuration control system with robust access rights.

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**Figure 1. Advanced Requirements**

thinking. In conversations with some of their staff one is immediately impressed with the enthusiasm and passion for the product. The As-One staff knows what it takes to run projects and build project management tools. The staff is willing to listen to suggested changes, but not recklessly promise the world.

Even with these strengths, there are functions that could be improved. Some of the following items may already be on the drawing board and interested parties should contact As-One for further details.

- 1) Project reuse is not strong enough. Although there is a lot of reusability in the knowledge base items, there is not a lot of reusability in the project itself. As-One is ideally setup to allow a project to be cloned to create a new ready-to-start project, but this feature has not been implemented. This could include items beyond the tasks and roles for the tasks, but also the risks, change histories, requirements, knowledge base, external references, contacts, starting work products, etc. This would allow the project to inherit a known baseline and provide the ability to avoid recreating the wheel. Adding this functionality would greatly improve the product, producing potentially huge savings to the user.
- 2) Resource lookup is not suitable for a collaborative project. Currently, selecting a resource in a pull down window, results in one long (it can be very long), alphabetical, case-sensitive list of resource names. To be useful the user needs to be able to determine the resource's company, department and sub-departments before attaching it to an item.  
  
In addition, a search function to find resources by first name, nickname (Bob vs. Robert), family name, department, email address or other attribute should be added. This is crucial in even moderate size organizations.
- 3) As mentioned earlier, there is a strong relationship between tasks, documentation, work products and non-scheduled activities, but this comes with a price. At times it is difficult to discern the relationships and it is not clear what those relations are. It is possible to see a late document, late task and discrepancy and think these are three different issues. In fact, they could be the same problem -- a discrepancy on a document that is the product of the task. Although this would never cause an actual problem of working with the tool, it can cause confusion and may require the Program Manager to explain to a superior that there are not three late items; only one.

As-One's approach to associating items is good for a well disciplined or small organization, but when a project

consists of users from different organizations or companies a stronger discipline may need to be enforced by the Project Management tool.

- 4) The document routing and signoff function is too restrictive. A more robust workflow routing for documents should be provided allowing ad-hoc routings and delegation processes. As-One has embedded workflow into items such as Discrepancies, Risks, Action Items that adhere to a state machine mode. This will take care of the high level tasks, but if the user has a task to create a Work Product (document) that requires signed off by his or her supervisor, the Project Manager, the manufacturing

### Functionality Summary

#### **Project Templates:**

As-One does not have a formal Project Template concept. The product has all of the components that are required to enable it and does provide an excellent knowledge base to build projects from.

#### **User Views:**

The product allows highly customizable views and an extremely flexible "Start Page" that allows users to see what is important to them. As-One does not provide a web based graphical representation of the schedule.

#### **Issue Tracking:**

Excellent coverage and delineation of non-scheduled activities, including Risks, Discrepancies, Events, Action Items

#### **Reuse:**

Other than the extensive knowledge base functions, As-One does not currently implement reuse concepts.

#### **Knowledge Base:**

Excellent knowledge base for tracking company, program project and task information.

#### **Document Workflow:**

Enforces a state machine style workflow for non-scheduled activities such as Risk, Discrepancies etc. Can attach documents and tasks to activities to provide very flexible use.

#### **Process Workflow:**

Process workflow that would allow branching of workflows based on parameters does not exist.

#### **Ease to Update Task:**

Majority of screens are easy to use, some need to be improved.

#### **Contact Information:**

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manager and QA, there is not a mechanism to do this.

- 5) Workflow starts and completions cannot be tied to a task to auto-update the task as the workflow proceeds. This would an important time saving function.

There is also no dynamic processing of workflows. Dynamic processing would allow a workflow to take alternate paths based on some parameter (say, change request cost) in the workflow as the workflow proceeds.

- 6) Some screens could be improved to facilitate quicker data entry. The most notable of these is updating the time spent on a task. This process should be to click on the task from the "Start Page" and enter hours, or percentage complete, and click "OK". Currently the process is 1) click on the task, 2) choose the Resources tab, 3) choose Add Resource (not intuitive), 4) modify the hours on the task. This is not the norm for the product, but is an obvious item to fix for the occasional user.
- 7) As-One does not provide a web-based graphical representation of the schedule (i.e. Pert or Gantt charts). Some

may feel this a hindrance. Surprisingly while reviewing the product it did not appear to detract from the use or functionality of the tool.

If a user needs this type of functionality, it can be produced by use of an offline tool such as Microsoft Project.

- 8) Netscape users beware. There are functions that will not run in Netscape. The intended browser is Internet Explorer Version 4.0 or higher.

As-One proves that it can provide extensive benefits to a well disciplined project team. The product is well thought out and provides many of the needed tools to assist in completing a project with minimal problems. It is not as well suited for project teams that are not strongly versed in project management methodologies, but thorough documentation of procedures and training should avert most of these issues.

For assistance in further evaluations of As-One or other Collaborative Project Management tools please contact Todd Williams at ECameron, Inc., 1-360-834-7361.

## Resources:

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Startwright's Project Management portal	<a href="http://www.startwright.com/project.htm">www.startwright.com/project.htm</a>
Business Process Management Initiative	<a href="http://www.bpmi.org">www.bpmi.org</a>
The Workflow Management Coalition	<a href="http://www.wfmc.org">www.wfmc.org</a>
Open Directory of Project Management Software	<a href="http://dmoz.org/Computers/Software/Project_Management">dmoz.org/Computers/Software/Project_Management</a>
Open Directory of Workflow Products	<a href="http://dmoz.org/Computers/Software/Workflow/Products">dmoz.org/Computers/Software/Workflow/Products</a>
The Enterprise Content Management Association	<a href="http://www.aiim.org">www.aiim.org</a>
Workflow And Reengineering International Association	<a href="http://www.waria.com">www.waria.com</a>
e-Workflow	<a href="http://www.e-workflow.org">www.e-workflow.org</a>

## Tools:

Microsoft Project 2002	Microsoft, Inc.	<a href="http://www.microsoft.com/office/project">www.microsoft.com/office/project</a>
As-One	As-One, Inc.	<a href="http://www.as-one.net">www.as-one.net</a>
PlanView	PlanView, Inc.	<a href="http://www.planview.com">www.planview.com</a>
Enact	Enactex, Inc.	<a href="http://www.enactex.com">www.enactex.com</a>
S2S	Tonbu	<a href="http://www.tonbu.com">www.tonbu.com</a>

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