

## SOPHISTICATED PROJECT MANAGEMENT FOR SMALL TEAMS

In my November 2007 article, *“Online Collaboration Services Review”*, I confessed to being a planning junkie. I was indoctrinated into Project Planning and Project Management Methodology early in my career, and I’ve witnessed how it can determine the failure or success of a project.

Today there has been a renewal of interest in Project Management skills and methodology as a result of the Project Management Institute’s certification program. The principles stressed in their Project Management Body of Knowledge (PMBOK) provide a valuable framework for both new and experienced project managers.

### *So where is the supporting software?*

It’s not easy to find products that fully support Project Management principles; it is even harder to find such support in the Software as a Service (SAAS) arena. For a large enterprise willing to spend five or six figures on an enterprise project management solution, options abound. [Gartner Group](#) released their quadrant analysis of [Project and Portfolio Management](#) players in June 2007.

For the small team or independent project manager, the tradeoff is between collaboration features of an online service versus robust planning functionality available in desktop planning software.

### **Dream Software Criteria**

The features below are items I would want in a killer-app project management solution.

- **No Software to Download** – Desktop applications are rich, but usually produce proprietary files that require each user to have their own copy of the software. As we don’t usually ask our clients to make that investment, pdf snapshots of the plan must be created to communicate progress.
- **Time Entry** – Neither the Project Manager or the PMO should have to spend time each week distributing and recording timesheets. Each team member should be able to logon, record their hours for the week against tasks assigned, and even complete a status report.
- **Grasp of Basic Math** – Total Hours should always equal Hours Spent + Estimate to Complete. % Expended should be based on Hours Spent / Total Hours. The software should not try to “guess” the estimate to complete based on an arbitrary estimate of “done-ness”. The Percent Complete method of estimating hours is highly subjective and misleading. What you really want is for the team member to estimate how much more time they need to be finished.
- **Obedient Magic** -- Enough with software that mysteriously alters dates, durations, and/or estimates! Yes – project management software should be able to estimate schedules based on constraints entered, such as task hours, resource availability, dependencies, and loading methods. But it should only do so on command!
- **Resource Balancing** – Don’t kill your team! My dream tool allows me to view the task load on each resource on a weekly basis. It allows me to define resource calendars – some full-time, some part-time, some on long vacations. A critical tool to defining, and continually managing, a plan is being able to see the peaks and valleys of your resource load.
- **Customization** – I never leave well enough alone. My dream tool should let me add custom database fields and tailor reports and views... and I want to save my customizations for multiple projects!

Of course it should also provide basic core features such as work-breakdown-structures, dependencies, Gantt charts, pert charts, and base-lining. So with visions of planning joy in my head, I reviewed several online options.



## Online Project Management

Seven online project management services were reviewed. A [detailed comparison grid](#) of these services is attached.

- *Celoxis* <http://www.celoxis.com>
- *Vertabase Pro* <http://www.vertabase.com>
- *Smooth Projects* <http://www.smoothprojects.com>
- *eStudio Same Page* <http://www.same-page.com/>
- *AceProject* <http://www.aceproject.com>
- *37 Signals Basecamp* <http://www.37signals.com>
- *ZOHO Projects* <http://www.zoho.com>

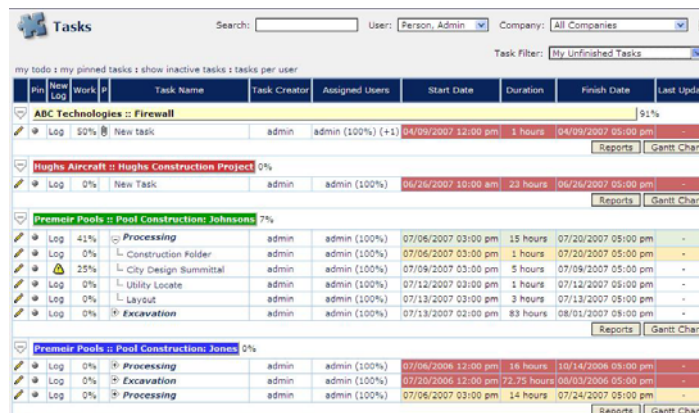
### Pricing

All of the vendors reviewed provide their services online for a monthly fee. Fees ranged from \$8 to \$80 a month, but varied greatly in their terms. The most logical approach was to charge based on disk space and users. Several services limited the number of projects, or charged based on the quantity. *AceProject* both limits the number of projects and limits the number of tasks that can be defined.

*Zoho* provided the best pricing overall, offering the most space for the lowest price – but was short on features. *Celoxis* offers 1 GB of space for \$65 per month, with a robust feature set.

### Project Planning

All of the services provided the basics of task entry and assignment, many with alerts and attachment features. Surprisingly though, many of services did not provide the ability to define a hierarchy of tasks. The traditional Phase – Activity – Task structure organizes the plan and helps to preserve the sanity of the project manager. *AceProject*, *eStudio*, and *BasecampHQ* provided only a flat task structure. These three services plus *Zoho* also failed to provide Resource Balancing functionality.



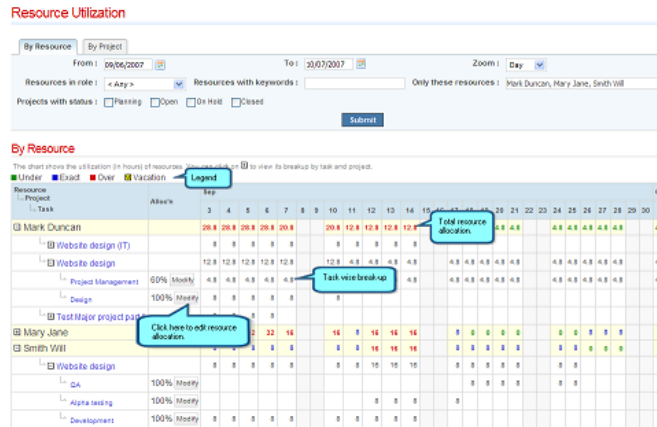
Pin	New	Log	Work	0%	Task Name	Task Creator	Assigned Users	Start Date	Duration	Finish Date	Last Update		
					ABC Technologies :: Firewall					91%			
					Log	50%	New task	admin	admin (100%) (+1)	04/09/2007 12:00 pm	1 hours	04/09/2007 05:00 pm	
												Reports	Gantt Chart
					Hughes Aircraft :: Hughes Construction Project					0%			
					Log	0%	New Task	admin	admin (100%)	06/26/2007 10:00 am	23 hours	06/26/2007 05:00 pm	
												Reports	Gantt Chart
					Premier Pools :: Pool Construction: Johnsons					7%			
					Log	41%	Processing	admin	admin (100%)	07/06/2007 03:00 pm	15 hours	07/20/2007 05:00 pm	
					Log	0%	Construction Folder	admin	admin (100%)	07/06/2007 03:00 pm	1 hours	07/20/2007 05:00 pm	
					Log	25%	City Design Summital	admin	admin (100%)	07/09/2007 03:00 pm	5 hours	07/09/2007 05:00 pm	
					Log	0%	Utility Locate	admin	admin (100%)	07/12/2007 03:00 pm	1 hours	07/12/2007 05:00 pm	
					Log	0%	Layout	admin	admin (100%)	07/13/2007 03:00 pm	3 hours	07/13/2007 05:00 pm	
					Log	0%	Excavation	admin	admin (100%)	07/13/2007 02:00 pm	83 hours	08/01/2007 05:00 pm	
												Reports	Gantt Chart
					Premier Pools :: Pool Construction: Jones					0%			
					Log	0%	Processing	admin	admin (100%)	07/06/2006 12:00 pm	16 hours	09/14/2006 05:00 pm	
					Log	0%	Excavation	admin	admin (100%)	07/20/2006 12:00 pm	72.75 hours	08/03/2006 05:00 pm	
					Log	0%	Processing	admin	admin (100%)	07/06/2007 03:00 pm	14 hours	07/24/2007 05:00 pm	
												Reports	Gantt Chart

**Smooth Projects – Task Breakdown**

*Celoxis*, *Smooth Projects*, and *Vertabase Pro* provided the richest project planning environments, including work breakdown structures and resource balancing. Each was missing a key component –

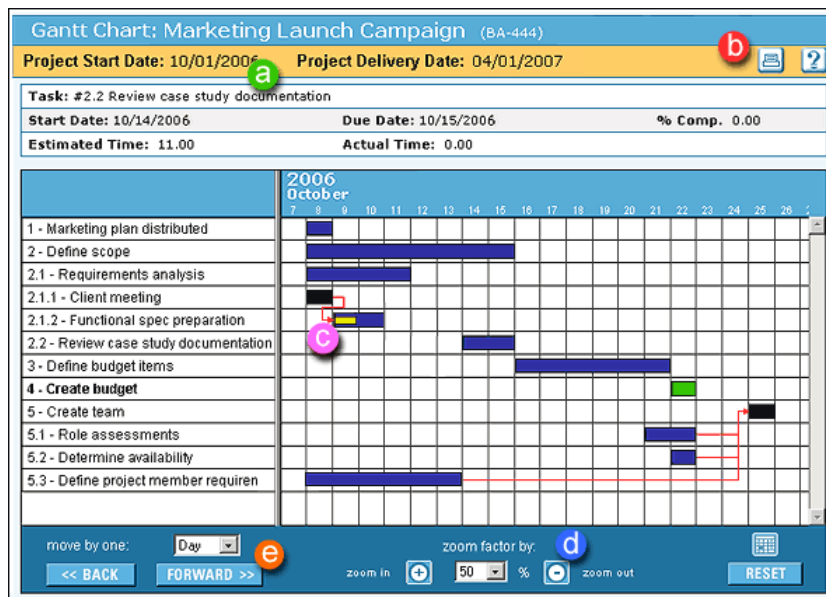


*Celoxis* does not track baseline estimates and *Smooth Projects* and *Vertabase Pro* do not provide auto scheduling.



**Celoxis – Resource Balancing**

*Smooth Projects* and *Vertabase Pro* do not provide auto scheduling. If your project plans do not have a lot of complicated dependencies, you might be fine without the automatic scheduling feature. However, without this feature, there are no tools to assist the Project Manager with adjusting a plan once it is off track.



**Vertabase Pro – Gantt Chart**

**Online Management & Collaboration**

All of the services provided some level of document management and online time entry. Our top-3 ranked services all provided management tools to track issues, changes, statistics, financials and status.

Only *Celoxis* and *AceProject* provided the capability to customize views and reports, and some limited workflow features.



## Conclusions

*Celoxis, Vertabase Pro, and Smooth Projects* offer the richest feature environment for the money. All three base pricing on disk space used, not an arbitrary count of projects or tasks. Each has flaws, and your prioritization of features will determine the best fit.

During this research, I downloaded a freeware copy of [Open Workbench](#). This is desktop software for project planning and management. This free tool is incredibly feature rich ([see feature chart](#)). As a desktop tool, it does not provide collaboration features. However the powerful scheduling algorithm and resource balancer met all of my other wish list criteria.

My choice – for small projects where only the project manager will be modifying the plan, Open Workbench is a great choice. I created a hybrid solution by creating the plan on the desktop and then exporting the tasks into a list on our Sharepoint portal for time keeping. While this is not an ideal situation, for teams of 4 or less it works just fine. For larger project teams, I plan to use Celoxis. I'm willing to sacrifice the baseline for the ability to regenerate schedules.

### ***About the Author***

***Molly Mangan*** is President of Even Keel Strategies. She has an information technology background with twenty years of experience in strategic planning and project management.

*Ms. Mangan was also the GIS Director for the City of Chicago from 2002 through 2007.*



	Celoxis	Vertabase Pro	Smooth Projects	eStudio	AceProject	Zoho Projects	BasecampHQ
<b>URL</b>	<a href="http://www.celoxis.com/">http://www.celoxis.com/</a>	<a href="http://www.vertabase.com/">http://www.vertabase.com/</a>	<a href="http://www.smoothprojects.com">www.smoothprojects.com</a>	<a href="http://www.same-page.com/">http://www.same-page.com/</a>	<a href="http://www.aceproject.com">www.aceproject.com</a>	<a href="http://www.zoho.com">www.zoho.com</a>	<a href="http://www.37signals.com">www.37signals.com</a>
<b>Short Desc</b>	Web-based project tracking portal. Pretty sophisticated work breakdown structure and management.	Full featured project management online.	Looks like a pretty sophisticated planner, but difficult to determine from data provided.	Track documents alone or with projects, Project tasks more sophisticated.	Nice interface and organization.	suite of online web applications	Project focused collab and tracking
<b>My Ranking</b>	1	2	2	3	3	4	5
<b>Cautions</b>	Only actual hours are tracked, not estimates. Estimates are based on %Allocation and duration. Low disk space, pricing model will get expensive with many users.	Price is high compared to competitors	Appears full featured, but many of the feature descriptions on their website are broken, making it difficult to do a full review.	No resource balancing - even though collects needed data	Limited by the count of tasks assigned to a project. Very Task centric.	Zoho has several apps that together could cover all rqrmts - but they are not integrated yet. Zoho Business plans to do this, but is in Beta	Pay extra for time tracking, no doc mgmt.; Same as much cheaper Zoho
<b>Pricing</b>							
<b>Monthly Fee</b>	\$40	\$80	\$39	\$50	\$24	\$8	\$24
<b>Capacity</b>	520 mb	not stated	300 mb	150 mb	250mb	1 GB	500mb
<b>Users per Price</b>	1	1	unlimited	Unlimited	10	Based on # projects	unlimited
<b>Client/External Users</b>	Free but limited.	4 read-only users	unlimited				
<b>Free Trial?</b>	Yes	Yes	No	Yes	Yes	Yes, 1 project free	Yes
<b>Price info</b>	Read-only users are unlimited. \$15 for small 20MB plan. (500mb avail for extra \$25/mo)		1 gb is \$80/mo		Limited to 250 tasks! Addtl 1GB for \$10/mo	7 payment levels	4 levels of pkgs. Timetracking & SSL are advanced.
<b># of Projects Limit?</b>	unlimited	unlimited	unlimited	possibly	limit of 15 projs	limit of 3 projs	limit of 15 projs
<b>Project Planning</b>							
<b>Task Assignmt</b>	Yes	Yes	Yes	Yes	yes	Yes	Yes
<b>Online Time Entry</b>	Yes	yes	Yes	Yes	yes	Yes	For an extra fee
<b>Milestones</b>	yes	yes	Yes	Yes	no	Yes	Yes
<b>Dependencies</b>	Yes	yes	Yes	Yes	yes	no	no
<b>Phase/Activity/Task Structure</b>	Yes	Yes	Yes	no	no	Yes	no
<b>Resource Balancing</b>	Yes	Yes	Yes	no	no	no	no
<b>Baseline - Estimates vs Actuals</b>	No	Yes	Yes	Yes	yes	no	no
<b>Schedule Calculation</b>	Yes	no	no	Yes	yes	Yes	no
<b>Gantt Charts</b>	Yes	Yes	Yes	Yes	yes	Yes	no
<b>Critical Path</b>	Yes	Yes	Yes	no	yes	no	no
<b>Task Alerts</b>	no	yes	Yes	no	no	Yes	Yes
<b>Budgets</b>	Yes	yes	Yes	no	no	no	no
<b>Timesheets</b>	Yes	yes	Yes	no	yes	Yes	For an extra fee
<b>Ms Project Sync</b>	2-way	yes	No	no	no	no	no
<b>Task Attachments</b>	Yes	yes	Yes	Yes	yes	no	no
<b>Custom Fields</b>	Yes	no	no	no	no	no	no
<b>Security</b>							
<b>SSL</b>	optional	optional	??	yes	??	Yes	extra fee
<b>User-based security</b>	Yes	yes	yes	yes	yes	Yes	Yes
<b>Content-based security</b>	Yes	yes	yes	yes	yes	no	no

	Celoxis	Vertabase Pro	Smooth Projects	eStudio	AceProject	Zoho Projects	BasecampHQ
<b>Project Management</b>							
Change Mgmt	yes	no	yes	no	no	no	no
Issue Logs	Yes	Yes	Yes	Yes	no - but tasks can be categorized as issues	no	no
Multi-team support	Yes	Yes	yes	Yes	no	yes	Yes
Proj Dashboard	Yes	Yes	Yes	no	no	yes	Yes
Statistics	Yes	Yes	Yes	Yes	yes	no	no
Financials	yes	Yes	Yes	Yes	no	no	no
Customized Rpts	Yes	Yes	??	no	yes	no	no
Project Reports	Yes	Yes	yes	Yes	yes	no	no
Status Reporting	Yes	Yes	yes	Yes	yes	Yes	no
<b>PIM Features - Email, Calendar, Contacts</b>							
POP, IMAP Support	no	no	no	no	no	no	no
Group Scheduling	Yes	no	no	Yes	Yes	no	no
Shared Calendars	Yes	yes	Yes	Yes	no	Yes	Yes
Reminders	Yes	no	no	Yes	yes	Yes	Yes
Import	no	no	no	no	Tasks and Users	no	no
Export	no	no	yes	no	All	no	no
Contact Lists	Yes - Addr Book plus Users and Client Mgmt	yes	yes	Yes	Yes - Client List. No import!	no	no
Contact Flex fields	4 custom fields	no	no	4 flex fields	no	no	no
<b>Document management</b>							
Document Storage	Yes	Yes	Yes	yes	yes	Yes	Only as attached to a message.
Doc Versioning	Yes	Yes	Yes	no	yes	Yes	no
Check in/out	Yes	Yes	Yes	yes	yes	no	no
Doc Meta Data	No	No	No	yes	No	Yes	no
External Links	Yes	Yes	Yes	yes	Yes	Yes	yes
Alerts	no	Yes	??	no	no	no	Yes
Workflow Mgmt	Yes	no	no	no	Limited approvals	no	no
<b>Online Tools</b>							
Forum	yes	no	Yes	yes	yes	Yes	yes
Info gathering, surveys	no	no	Yes	yes	no	no	no
Messaging Applications	no	no	no	yes	yes	??	yes
Customization	No - just dropdowns	No - just dropdowns	no	yes	no	no	no