

What's Out There ... And What Could Be

The 1998 Project Management Software Survey

Six categories of software, hundreds of detailed questions, links to the PMBOK Guide knowledge areas, and SIG-defined industry requirements: as you read this, the all-new PM Network Software Survey is in the hands of the vendors—and the results will soon be in yours.

by Jeannette Cabanis



SO, YOU THINK WE should move timesheets as a subcategory under communications management? I think you're onto something there ..."

"Sure. Timesheets are used to communicate status and estimates, additional tasks, and so on ..."

"Okay: here's another issue. What exactly do we mean by 'Web enabled'? Just Web publishing? Or more than that?"

"Customers want to be able to completely run the project management software from the browser—that's the ideal of what they mean by 'Web enabled.'"

"Nobody does that."

"Well, maybe they should."

"I can just see a vendor reading this list of features and saying: *Hey, we don't offer this ... but we could. We need to write this in ...*"

Linda is intense and energetic; Ketty serious and quiet. The other Linda is taking notes. Present via conference call today: Bob and George. You can hear the same pieces of paper being paged through in Atlanta, Milwaukee and San Francisco.

"Okay," the team leader says briskly, "today we are going to finalize all the questions for the portions of the survey concerning resource, cost, and schedule management software ..."

Since March of this year, on conference calls and around conference tables, a small and—well, *passionate*—team of volunteers has been dreaming up, and making real, a long-awaited project: the next generation of the

The Core Questions

Many hours of discussion went into creating a list of questions concerning features that the team felt would be common to all six categories of software. These common elements questions will appear in each chapter and be answered for all products covered in the survey.

The first set of questions, which are designed to be answered briefly, such as with yes/no, numbers, or a brief list, form the backbone of the familiar matrix format. The second set, framed to initiate a dialogue with the vendor, are open-ended and are designed to yield more qualitative data, allowing the vendor to express characteristics of the product that are not readily revealed by the more quantitative matrix questions.

Reporting

- Report writer
- Report Wizard
- Publishes as HTML
- Number of user-defined fields
- Drill-down/roll-up
- Import/export
- Automatic e-mail notification
- Macro recorder/batch capable
- "Canned" reports modifiable
- Sort, filter

Architecture

- Databases supported
- Supports distributed databases
- Three-tier client/server
- Client operating systems
- Server operating systems

- Network operating systems
- Minimum client configuration
- Minimum server configuration
- Client runs under Web browser
- Open architecture
 - Supports OLE
 - Documented Object Model
 - Documented Application Programming Interface (API)
- Simultaneous edit of data file
- Does product have a programming language?
- Are years stored as four-digit numbers?

Online Help

- Right mouse click
- Hover buttons
- Interactive help
- Help search feature
- Web access to product knowledge base

Vendor Information

- Training
 - Computer-based training
 - Training materials available
 - Customized training materials
 - Online tutorial
- Consulting available?
- Site license discounts?
- Enhancement requests: policy for comprehending existing customer's enhancement requests
- Modify source code and support through upgrades
- Global presence
 - Global offices
 - Multilingual technical support
 - Language versions (list):

Would you allow an audit of your Software Quality Assurance process?

Security

- Configurable access privileges (configures both groups of people and kinds of data)
- Passwords expire (forced update)
- Electronic approvals
- Password protect files

What are your top three product differentiators; describe what makes your product unique.

To what business processes can this tool be applied?

Describe the ideal end user environment for the current version of your product (size of organization, level of project management sophistication, effort and commitment required to implement).

Future strategies for this product.

Product's target market.

What are your product's three main benefits?—that is, how does using the product add value to the customer?

Describe your quality management process. List any relevant certifications.

Discuss your product pricing structure. Include volume discount levels, concurrent user options, site licenses, cost of implementation, and other issues.

Cost of implementation: training, tech support, annual maintenance, etc.

Note: Questions had not been finalized as this issue went to press, so the questions presented here are not in their edited versions.

This expansion was driven by the changing nature of the profession itself. Team member George Sukumar, a consultant with experience in construction and other megaprojects, notes that, whereas once project management started when the project was being built, now it encompasses everything from concept to closure. As the representative of the construction and engineering application areas on the team, Sukumar is actively looking for new products outside the scope of previous surveys to include in the book, such as software that "integrates the phases of a construction process, helps to create the proposal and automatically creates estimates for capital projects, saving months ... And government proposal software, which allows you to select the required forms ... and improve your produc-

tivity. That's what it all comes back to: productivity and competitiveness."

Another identified business driver was the need to speed up the software selection process. Linda Williams explained, "This kind of software costs a lot of money; yet the cost of the software is only 15 percent of the total cost of implementation ... the consulting, training and change management costs are enormous ... the previous survey was very good, the data presented is very useful ... you could narrow your possible choices down to 40 with it ... but this new survey will narrow it down to five products. With project management vendors running about 18 months between major releases, and product cycles shortening in every industry, the time saved could mean the difference between business

success and failure." To lengthen its shelf life, the survey will include emerging products, products that are now in beta for full production in 1999.

Still, the team acknowledges that the list is far from complete. "What's left out, we can do next time," says Williams. Some examples: HR software products, procurement products, communications tools such as groupware, and quality management tools.

What's Different. The team has identified six basic categories of project management software products to be covered in this survey: Scheduling, Cost Management, Risk Management, HR Management, Communications Management and Process Management software. Each category will be covered in a separate chapter in the book. Within that

Mapping Software Categories to Knowledge Areas

PMBOK Guide Knowledge Areas



Categories (Chapters) of Software Covered by Survey

Exhibit 1. The six categories of software correspond to *PMBOK Guide* knowledge areas. The team considered that the issues of Quality, Scope, and Integration Management were so closely related and intertwined that they had to be looked at as one software category, called Process Management. Each category will correspond to a separate chapter in the forthcoming book based on the survey results. (Procurement Management products are not included in the current survey.)

Still, to put it plainly, George Sukumar stresses that the ultimate goal of the survey is "to make a project manager more successful."

THROUGHOUT THE DEVELOPMENT process the team talked about planting seeds of two kinds: First, they hope to nudge the reader toward

creating a methodology for software tool selection within his or her own organization. In addition, by framing questions that indicate what project managers want and need in a tool, they hope to nudge the vendors to create products that better serve the project management user. As the profession and the Institute

move to a new level, the software survey is becoming a way for PMI not just to mirror, but to proactively influence the project management software industry. ■

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