software review 194

Genius Project

Steve Cotterell finds a Web-based PPM system worth yodelling about!

An online SaaS PPM system with impressive functionality and an excellent Gantt chart

What comes to mind when you think of Switzerland? Fine clocks and watches? Strangely shaped chocolate bars? Shooting apples off each others' heads with crossbows? Yes, all of these. But high-quality PPM software? Never! But you'd be wrong.

I'd assumed that Genius Inside was an American company and it wasn't until I'd visited their offices in Lausanne, on the shore of Lake Geneva, that I discovered that this was a Swiss company and that Genius Project (which currently has in excess of 50,000 users worldwide) was wholly a Swiss product, developed there, in Lausanne.

The system was originally based on IBM's Lotus Notes but is now also offered as a SaaS product. Some parts of the system are still Domino-based, but this is transparent to the user. It's Ajax-based and will work in any standard browser.

Most companies already have their own business processes in place and want to continue to use them when handling project work. Genius Inside (Genius) recognises this and the software is designed to fit with existing processes.

Each user organisation has their own section of Genius's server which runs their own copy of the software, making it easy to tailor the system and scale it to their requirements. Genius can split the system to provide different set-ups for different parts of an organisation, with the split system still using centralised resource-management and time sheet databases.

Modules available

Genius Project (GP) is modular in construction, the modules being Resources, Projects, Project Requests, Risks and Issues, Portfolio, Time sheets, Archive, KPIs and Simulator (which performs what-if functionality).

GP features three levels of collaboration. The first is passive – all documents, etc, can be shared from one central database. The second, active level, is based around the users' ability to define, for each person, what information they can receive. At the third, collaborative communication level, you find the functionality that facilitates the system workflows, approval cycles and so on.

It uses a role-based security system and user interface and currently features bi-directional integration with all versions of MS Project except Project 2007, which should be available by the time you read this. Genius claims that their customers save between 30 and 60% over the cost of installing MS Project Server and point out that, with their system, there is just one server to manage.

GP works with Windows, Mac and Linux systems and can be tailored to link with Open Workbench, the free, open source, project-scheduling module in CA's Clarity suite.

It can also be integrated with MS Office and Open Office, and open interfaces with SAP, Oracle, MFG Pro can be set up. By the end of March, integration with the SalesForce.com SaaS CRM system is planned.

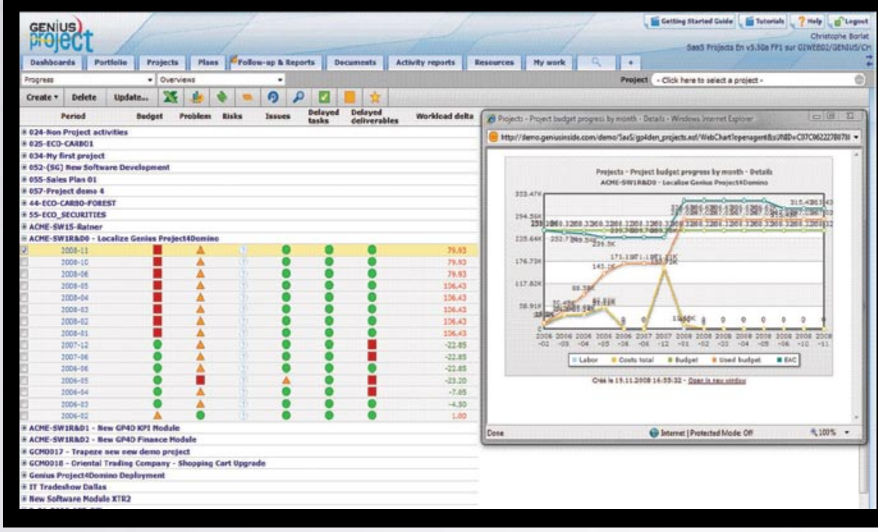
It supports all project management methodologies and strategies (including PRINCE2 and the PMI methodologies) and can map any process onto its system. This is done at configuration time – which takes five days and includes setting up the system and providing two days' training for six to ten key users who, Genius anticipates, will require a further two months' technical support.

Getting started

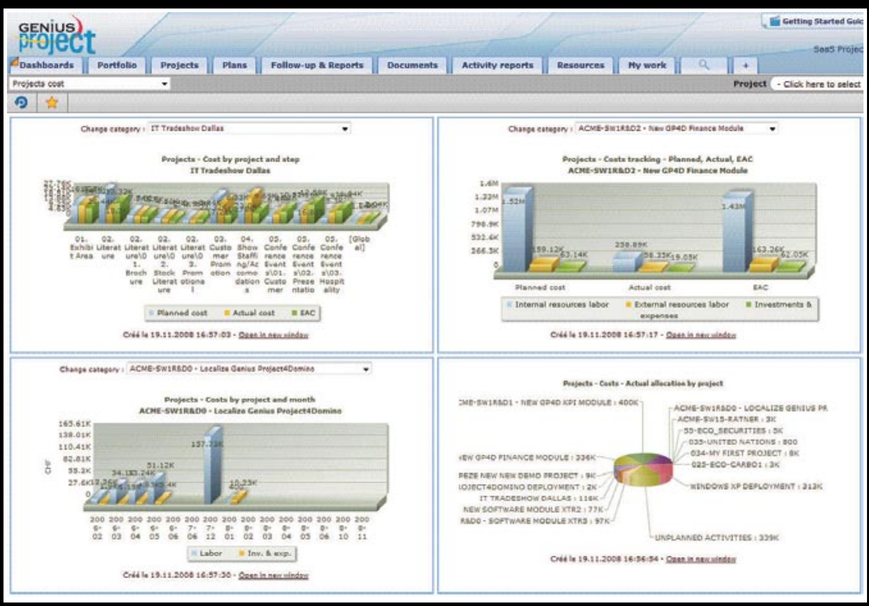
Having logged in to GP, the first screen you see depends on your system set-up. This might be your Home page which can list your issues, a to-do list and a list of your projects which includes status indicators. The user interface is configured at set-up and, like the rest of the system, is flexible. This review's been carried out on Genius's demonstration configuration.

A row of tabs along the top of the screen leads to the various module areas of functionality. There are also links to tutorials (Flash movies) and other

A Project Status chart



A dashboard



help. On the right of the screen is a configurable list of short cuts to views, documents and the like.

Although the system set-up is initially carried out by Genius, almost everything can later be edited by the key users. You can define the work units (hours, days, etc, – the system can cope with the length of a working day being different in different countries or areas), key words, titles, field names, permissions, rules for third party integration and units of currency used. Different people can view the same set of figures converted into different currencies and the system can be linked to a web service for automatic update or updated manually. Also defined are the rules applied to RAG indicators, controlling when they change colour.

Within the system is a document template designer. You can use this to create a document or form or you can link to an existing file (maybe a Word document) and then link that template to any part of your workflow system – which you can also design. The workflow designer is powerful in its functionality but is script-based. A graphical version is in development.

Fields from within the system can be set to pass their information to a document template when it's opened – meaning that some template fields can be automatically completed. You can set up Excel report templates and pass data from Genius fields to them so that, when opened, the reports already contain the information. Graphic charts can be defined and you can specify where in the application these charts will appear.

Work costs can be defined by currency, country, role and company. Different cost and invoicing rates can be attached to different activities performed by the same resource.

This level of functionality is not compulsory, but it's available. Genius tries to avoid giving people more functionality than they need, trying to understand their customers' processes and fitting their software around them. Sometimes this involves just set-up changes, sometimes they add new coding. One customer requested a tool for tracking change requests against budgets and this tool becomes part of the standard version in the next release.

You can define real and generic resources. You state their availability, what rights each has and what information they get. People can later book their holidays and other absences and GP can then show their availability on any given date, taking into account any tasks they may already been assigned. A personal calendar screen can be viewed and the same information can be displayed as a personal Gantt chart – complete with a workload graph.

The system can produce capacity planning views showing the total availability of each generic resource. When resourcing, you can search for resources by skills, availability, etc, and the system will list the suitable people available.

A workflow system can be set up to handle project requests which, when approved, are 'promoted' to full project status.

Project managers can display lists of their projects and can drill into any project on the list for more information.

Creating a project

There are three ways to create a project in addition to promoting a project request. You can manually enter the full project details into the system, you can use a 'Quick Project' function for small projects that aren't going to need the full weight of the system applied to them, or you can use an existing project template. Project templates can contain the schedule, resources, documents, workflows, milestones and deliverables.

When creating a project (it can be a sub-project of another), you name it and enter the objectives, start and end dates and budgets – there's a neat way of summarising the resources required at a high level. You can add other costs and the system will work out the total expected budget.

You can then assign people to the senior project roles and attach files containing more information. You add generic resources and, when finished, you can baseline the project.

To create the plan using Genius Planner, you type in the stages, tasks and milestones in the usual way. Full drag-and-drop functionality is available on this excellent Gantt and the tasks can be linked by dragging the link from one task to the next. All four link types are available and constraints can be added by clicking the link. Clicking a button displays the Critical Path in red.

Plans can be baselined and the baseline is shown on the Gantt. At the time of writing there are two baselines available, but by the time you read this there should be 25.

Clicking on a task name in the Gantt opens a dialog box in which you can assign several individuals to that task and specify how long each individual will work on it. The system doesn't automatically assume equal assignments if several people are assigned to a task.

Clicking a button opens a resource Gantt showing the allocation of work by resource. You can see if anyone's overloaded and, if so, by dragging a task you can re-assign it to someone else. The system will let you leave over-assignments in place should you choose to do so. Overtime is listed on the time sheet and, in set-up, overtime rates can be set. A team Gantt can be displayed and assignments moved or re-timed by dragging and dropping Gantt bars.

If a task's been assigned to you, you can delegate it to someone else. The project manager will see what you've done and you'll still be responsible for the task. However, the person to whom you delegated the task will complete their time sheet with the details of work done.

Portfolio managers can display a Gantt showing the current status of each project in their portfolio, grouped by programme. This list can be filtered to display a specific project set. In the next version portfolios will be definable by alternative criteria and groupable in various ways.

When assigning someone to a task, you can view their existing assignments during the same period and see if they've spare capacity. Additional resources can be added to a project at any time. People, when assigned, are advised by email. If project managers must request resources from resource managers, a workflow can be established to handle the process.

You can create different types of deliverables and different approval processes for each.

Deliverables can be converted from one type to another. If a different approval process applies to the new type, that is enforced. Inter-project links are established by creating output and input deliverables which can then be linked. These links can be displayed on multi-project Gantts.

Should you want to create a plan in MS Project, you can open Project from within GP. The resource list is pushed across from GP to Project. The plan can then be created and brought into GP. When importing ready-made files from Project, resource names can be linked or substituted – this handles any differences.

Progress can be pushed both ways between GP and Project. If desired, an MS Project look and feel can be applied to the Genius Planner interface.

When making entries in the risk log, you can define up to four levels of risk. You define the likelihood and impact of the risk and a graphic then displays the severity of the risk against a RAG background. You can create a mitigation plan, entering figures to show how much the mitigation would reduce the likelihood and impact of the risk. You can then compare the cost of mitigation against the likely cost of the risk occurring. The result of the mitigation is then also plotted on the graphic.

You can view a list of all the risks in the system and also a grid that shows all risks on a matrix display. You can drill into each risk on this graphic to see its details.

Collecting time

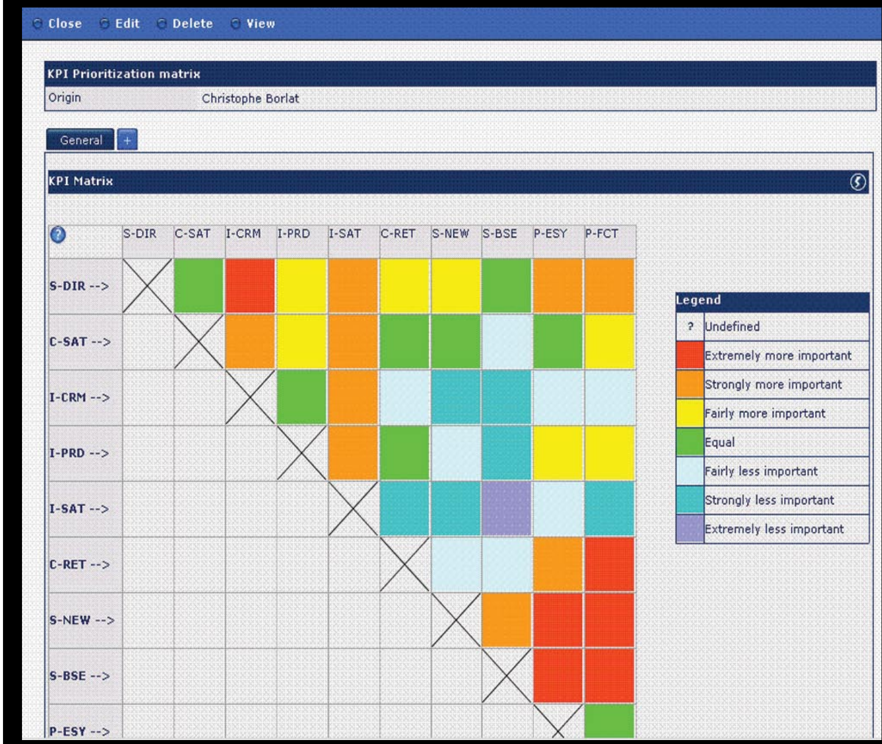
The formal way to submit actuals is to complete a time sheet. However, as many people don't like time sheets, there's a way of selecting a task from your Home page, clicking an icon and entering in the resulting dialog box the time you've spent on it. If you've already started a time sheet for this period, this information's entered on it. If you haven't then one's created.

Time sheets are weekly based. You can ask the system to create a time sheet pre-populated with all the tasks that you're assigned to. The system can be configured to create pre-populated time sheets for all users.

The time sheet will show tasks assigned to you and also tasks assigned to any group that you belong to. You specify the type of time (normal, overtime), enter the hours worked and whether the task's finished. You can also enter a new estimate to complete – which won't change the task but will go to the project manager who will decide if its remaining duration needs changing.

You can create a new task for yourself. The project manager gets an email and can choose to upload this task to the Gantt.

The time sheet can be sent through a workflow for approval and, when approved, will update the project. The system also includes an Expense Report which in many ways is similar to the time sheet system.



The KPI Prioritisation Matrix

Document handling

Documents can be linked to any level of the work breakdown structure and also to any other document. Named folders can be created and documents from anywhere in the system placed in them. You can list documents attached to all projects and can filter, sort and open them from the list. You can also view the workflow position of any document, to monitor its progress.

You can set the access rights to each document. A list is kept of who has accessed what document and version control is exercised. You can specify who is to be notified when a document's changed, whether or not they themselves have chosen to be notified. You can circulate a document to a group of people and attach a note to it. You can ask for a document to be checked and be notified when the people you asked to check it have done so.

The system features plain text searches. You can carry out complex searches of the entire system, including all attached documentation, for words or phrases, relating to specific projects, by specific authors, etc. You can save and re-use searches.

The information on any system document can be exported to a Word or Open Office document and this file is automatically attached to the system document. The attached file is also edited if the system document is changed.

You can attach a note containing a point for discussion to any system object. By default, a copy of this note is sent to the people with access to the original object, but you can also send it to others. When they reply, a sort of 'forum' is built up. The only difference, currently, between the Lotus Notes and the SaaS versions of GP is that the Notes version has an online chat functionality attached to documents. It's hoped that this function will soon be available in the SaaS version.

Reports

Project managers can open a list of their projects and expand any project entry to show a month-by-month project status display. The system doesn't include any exception reports but there's a progress report attached to each project that the project manager completes manually and sends up the command chain.

Detailed cross-project cost/budget and actuals reports are available, drillable down to detailed level. Unplanned expenditure can be captured by the creation of a specific cost document which can be sent via its own workflow and attached to the project. Earned value reports are available in the system, including graphical reports (which are displayed in Excel).

There are some standard reports built into the system (Genius find that customers usually require specific reports created at system configuration time). All the data in the system can be sent to Excel (there are about 70 pre-defined Excel reports and charts available) and it's also available to Crystal Reports – with about 70 pre-defined Crystal Reports available.

A third-party custom report builder, Intelliprint, is currently available as an add-on but it's intended to include this in the system soon. Users can define role-based dashboards to contain both pre-defined and user-defined charts.

Tracking key performance

By the time you read this, the new KPI module should be available. This module helps you to choose the right projects to work on. You define your objectives for the next year and then describe each KPI, stating how you're going to measure it. Each KPI is then rated against the others to ascertain which are the most important to the company. You then list all of the project requests and compute the 'business value' of each by ranking the project requests against their business value importance to each of the KPIs. If this exercise is done by several people, the system will compute the average of their ratings.
All the project requests can be listed showing the KPI figures rated in order according to your assessment of the most important KPIs. This information can also be displayed on a bubble chart.

By March, a system should be available that allows you to work off-line and then update the on-line system when you next reconnect.

Right to reply

Thanks, Steve, you did a great job with this review. I don't have much to add except to emphasize that Genius Inside has a worldwide presence. During the past 12 months, we have been concentrating our marketing effort on our North American operations.

Christophe Borlat
General Manager, Genius Inside SAK) Ltd

How much does it cost?

Full version $US 39 per month
Express version $US 29 per month (this is a cut-down version with fewer features)
Time sheet only $US 7 per month
These prices are per user and based on 50 users per year. They include the greater of 1GB or an aggregate of 20 MB per licence. Maintenance and support are included.

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