The Use of ProjectEDGE for IT Project Management

W. Gary Craig, President, ProjectEDGE.com
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This white paper describes the use of the ProjectEDGE Extranet for the management of IT projects. For white papers covering construction, renovation or rearrangement projects, see the ProjectEDGE web site www.projectedge.com.

For purposes of the white paper, it is assumed that IT projects are being managed using an Extranet to which a group of participants such as IT professionals, end users, outsourced vendors and suppliers and other interested parties have been given access in varying roles depending upon their responsibility. Whether the participants interface with the Extranet through a LAN or via the Internet through an ISP, all users are assumed to have an e-mail address to which notices of their required action can be sent.

The white paper illustrates the use of the Extranet in some of the functional sections of the Extranet. Those described were picked as being used in most IT applications.

Action Items

Action items can be used in many ways in managing IT projects such as providing follow-up to workflow route of approvals, meeting or correspondence follow-up, schedule task management and follow-up of any other time related item. The opening view of ProjectEDGE focuses on action items sorted either by due date, responsible person or responsible company.

Project managers can use the listing to track each and every item for every project for which they are responsible. The responsible individuals or companies can review the listing of current or future responsibilities.

In daily practice, responsible persons would receive an e-mail notification informing them of the action item and its required task along with the due date. Any interested copied parties would also be informed of both the initiation and the completion of the action item. All notices would be delivered to the respective persons at the e-mail address in the database phonebook. Each such notice would contain a link that brings the person directly to the action item (or any other document about which a notice is generated) thereby avoiding need to continually refer to the database to see what is required.

Individual task items of the IT project could be assigned their own action items that are used to record periodic progress comments from the responsible parties, thereby providing all interested parties with an easy means of determining the status of the item any time of the day from any location where they have Internet access.

Contracts

If the IT project is large enough to require the use of outside vendors or subcontractors, contracts, purchase orders as well as change orders could be generated and tracked. Small scopes might be tracked just using a work order which could be generated and tracked through the database.

Depending upon the nature of the invoicing process in place at the IT organization, it might be desirable to process invoices from outsourced consultants or subcontractors using a workflow based approval process.

Communications

All communications including letters, memos, faxes, transmittals and conversation records about the IT project can be created and maintained in the database to provide a consolidated source of all of the communication information about the project. Instead of having information about the IT projects in individual persons' e-mail accounts, all of that information can be captured in the database where it can be maintained independent of the infrastructure for each individual.

Discussion

IT managers could use threaded discussions in the same way that we do for developing and refining ProjectEDGE. Where we know the nature of a problem we will use a discussion main topic to develop a discussion of the concept for solving the particular issue. The discussion concept will then be distributed to all interested or invited parties for their review and comment.

The threaded discussion and all of its responses can create a threaded history of every component from its concept all the way through to its implementation, if the participants continue to add to the record as the component is coded and implemented.

Meeting Minutes

The meeting minutes module is organized like a threaded discussion except that the users can define as many different meeting tracks as they deem appropriate to what they are doing. For example, each product line or version of a product line could be considered as a separate meeting track to organize all the information in one convenient place. One of the easiest ways to illustrate this is to describe the meeting track used to manage the development of our Version 3 series of ProjectEDGE. We created a meeting track specifically for that version and set up in that meeting discussion the following items:

- Items Affecting Entire Application
- Action Items
- Contracts etc. for all of the modules
- Tasking
- Implementation

The meeting facilitator and other team members decide what the appropriate categories are and sets those up in the meeting minutes. Each of the discussions were updated throughout the meeting cycle and were then carried over or closed out as needed.

In any meeting cycle, participants or other authorized parties could create action items to be solved by further development or even by repair of a bug or some undesirable feature. We extended the capability of the action items by using collaborative items that could be assigned to a person having overall responsibility who in turn assigned the task to someone else to complete. By being a collaborative action item, the description of the problem could be embellished as much as necessary including links to examples before locking it and making the final assignment of responsible person. Upon locking, the responsible person would be assigned a due date and would receive electronic notice of the pending action item. Throughout the time of their dealing with the action item, they should add periodic updates or provide links to progress updates described elsewhere such as in the threaded discussions.

We also used the comments feature to attach comments about any of the meeting topics. The comments are usually more like user reactions or suggestions than repair items like the action items cover. Nevertheless, a place is provided for user feedback on a section or feature-by-feature basis.

Using the techniques above, the meeting minutes can be used not only to capture the minutes of an actual meeting, but they can also be used as a live ongoing diary of all the product development.

Management Reports

An IT project typically requires some level of reporting for managers or clients. ProjectEDGE allows the IT project manager to tailor the reporting to meet the requirements of those parties. As in other sections of ProjectEDGE, access for creation, editing or reading can all be tightly controlled to provide focused secure reporting.

The generic status reporting format can be used to report on all aspects of the project or the IT manager can use separate and budget reporting if warranted. For example, the overall status report might be written for client consumption while budget and schedule reports might be more detailed for use by the development team.

Budget Reports

Budget reporting can range from something as simple as reporting through a user-maintained spreadsheet or could be as involved as an interface with reporting directly from the organization's job cost accounting system. Regardless of the source, the cost information can be shared on a secured basis with a specific targeted audience.

Schedule Reporting

Simple schedules can be managed through a series of individual tasks which are entered as action items. Alternatively, some users employ a spreadsheet of tasks, descriptions and due dates which could also be published in ProjectEDGE.

If a product like Microsoft Project is used to generate and maintain schedules, those schedules can be published in ProjectEDGE for use by the entire project team. The Microsoft Project files can also be attached for anyone specifically using that software.

If more sophisticated scheduling products such as Primavera P3 are used, the results of those scheduling applications can also be made available through ProjectEDGE.

Status Reports

The status reports are set up with up to twelve user-defined sections that can be named according to the IT project management needs. Multiple status reports can also be used to report on different product lines.

A typical status report prepared for clients could include the following sections:

- Executive Summary
- Budget Summary
- Schedule Summary
- Issues and Proposed Mitigations
- Summary Status

The above descriptions and examples involve only some of the modules of ProjectEDGE that were selected as ones most applicable for use by IT project managers. Depending upon the breadth of the IT issues, other modules such as Training Library, Help Database, Equipment Inventory and Timesheets might also be required. See the ProjectEDGE web page, www.projectedge.com, for a listing of all the modules and their descriptions.

For more information on ProjectEDGE, white papers or demonstrations, visit our web site at www.projectedge.com or contact us at 888-516-EDGE, Fax 315-471-6659 or e-mail at projectedge@edgewaternet.com.

About the Author:

W. Gary Craig is a University of Toronto graduate with a degree in Civil Engineering and a diploma in Operations Research. Mr. Craig also holds a Master of Science in Management from Rensselaer Polytechnic Institute. Mr. Craig has over 30 years of experience in construction management and real estate development.

To learn more about The Use of ProjectEDGE for IT Project Management, contact:

W. Gary Craig, President
ProjectEDGE.com
225 Greenfield Parkway, Suite 102
Liverpool, NY 13088
Tel. No.: 315-471-4420 ext. 170
Fax No.: 315-471-6659
Email: gcraig@edgewaternet.com

Chris Crockett
ProjectEDGE.com
1782 Penfield Road
Penfield, NY 14526
Tel. No.: (585) 641-3060 ext. 105
Fax No.: (585) 641-3064
E-mail: ccrockett@projectedge.com

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