PROJECT DIRECTOR

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Background

Project Director is designed to complement the Microsoft Project software in an environment where people have to manage many varied small to medium sized projects. It solves the following issues or problems in common with projects:

- Adherence to project standards and methodologies
- Visibility of the project to key people (stakeholders)
- Keeping track of many small projects around a medium or large organisation
- Advice on the running of the project and visibility of critical project metrics
- Ease and speed of reporting is greatly increased
- Keeping track of all documents associated with a project (project office)

Key features

Project Director has been designed within a Microsoft infrastructure. It runs on a Microsoft 32-bit operating system (Windows 2000, XP, Vista) and interfaces directly to MS-Project and MS-Mail (Exchange, Outlook etc). The key features within the design are:

- three-tier client server design
- a central database containing project information
- graphical, easy to use interface with on-line help
- can keep track of hundreds of projects at once
- acts as an electronic project office by keeping track of all documentation and files
- simplifies, standardises and speeds up project reporting
- automatically opens up project files and reads status information, key performance indicators (KPIs), milestones and key dates
- shows graphical maps of project progress and history with KPIs
- manages tasks, actions and minutes
- has an expert system that makes suggestions to the management of the project
- has wizards to help occasional project managers with their projects

When Project Director is useful

You can use Project Director to manage a single project although it is more useful when dealing with many small to medium sized projects that are found in medium to large sized organisations.

Similarly, if you have a large project with many sub-projects Project Director could manage them but it won't take notice of any dependencies and resources that are common across the projects. In this case the use of project consolidation is probably a better method of tracking.

To summarise, Project Director can be used to solve any of the following business needs:

- you want to track many independent projects
- you want to reduce project reporting time
- you want to introduce and maintain project standards
- you want help in evaluating project performance
- you want to communicate project progress to many people electronically
- you have many varied people with different levels of experience managing projects

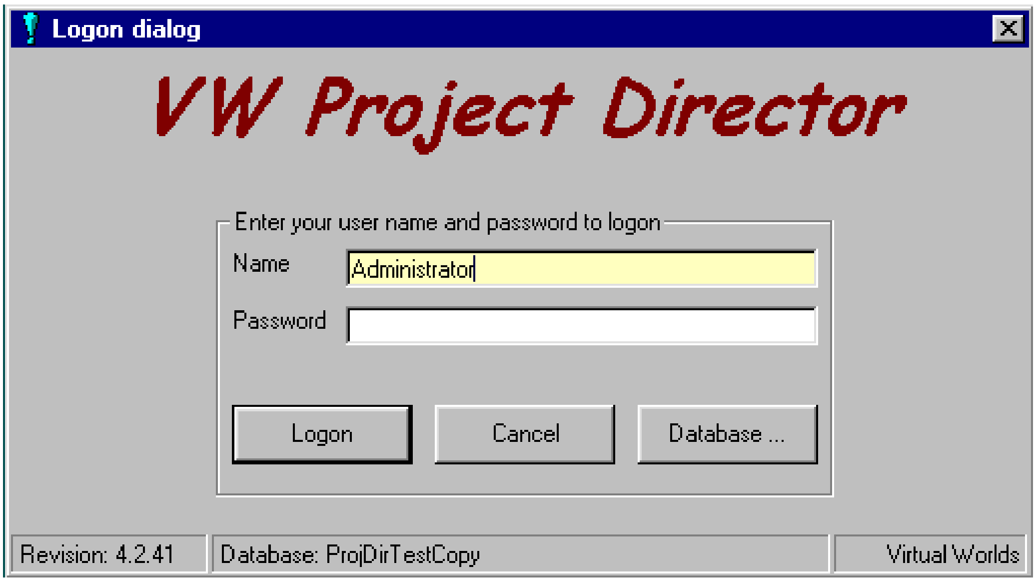
USING PROJECT DIRECTOR

Project Director can be used with little or no training assuming basic windows skills and some knowledge of project management.

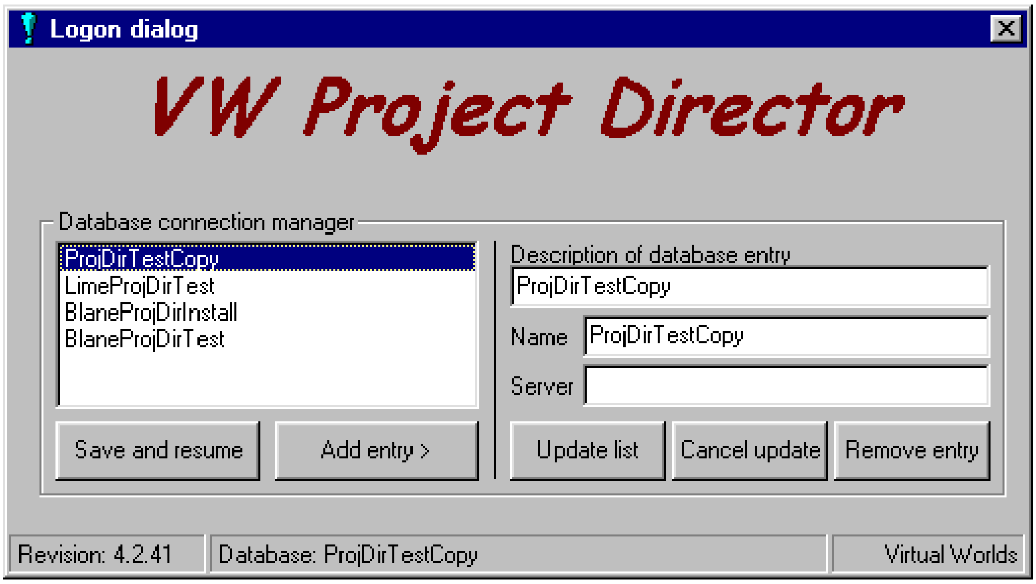
Setting up the client

After installation the client can be run. This will produce the logon dialog shown below. Initially there will only be the default database entered.

If your administrator has set the WindowsLogon option then the name and password options will be disabled (greyed). This means you will logon to Project Director using your windows username.



You can add new databases for the client by clicking on the database button. This produces a form where you can add server-database combinations as required (shown below).



Logon to the system

After the client has been set up to point to the right database when you start you will see the logon screen. Your project administrator should give you a username and password.

Simply enter your username and password and click OK. You are given three chances to enter your password correctly before the system will exit. Your name will be remembered next time you logon.

Security

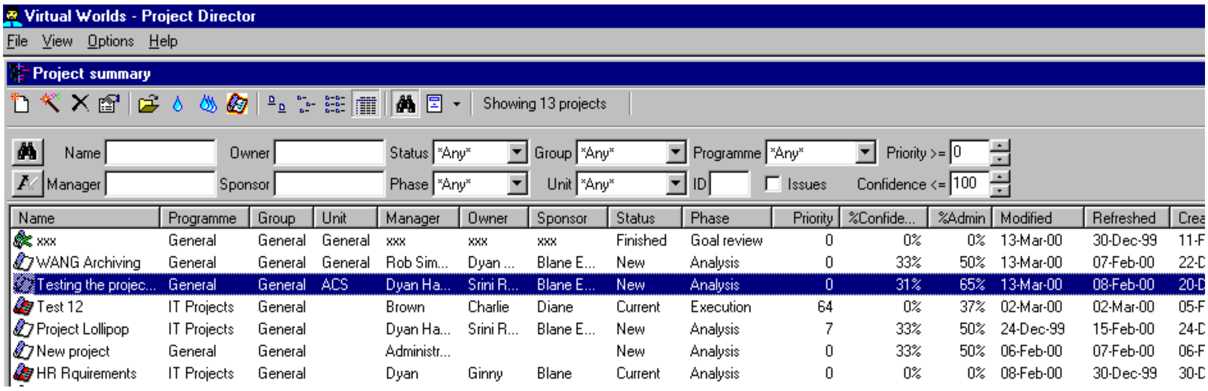
Each user is set up with a certain security level. The project administrator will have assigned you a certain security level depending on your required access. If you cannot change certain projects or menu items are disabled then it is because you have a restricted access.

Change password

You can change you own password at a later date by using the *Options, Change password* items from the main menu. You are prompted for you old password and then you new password with verification.

Summary view

The summary view will start automatically and will show a list of projects currently in your system. This will normally be blank after a first installation. A typical view is shown below.



Adding a project

Click the add project button to add a project to the database. This will start with a blank form that you need to fill out. Each field is explained later. This creates a new entry in the Project Director database; it will not create an MS-Project schedule. This can be done from the *View, Templates* menu or by using the new project wizard.

Adding a project using the wizard

The wizard is a better way to add a new project because:

- It prompts you with questions
- It sizes your project
- It will automatically add documents to your project folder

The wizard takes you through a series of questions after which it creates a project and allows you to edit it.

Removing a project

If you have administrator security then you may remove a project entry with the remove button. Note, this only removes the database entries it does not delete any project files.

Properties of a project

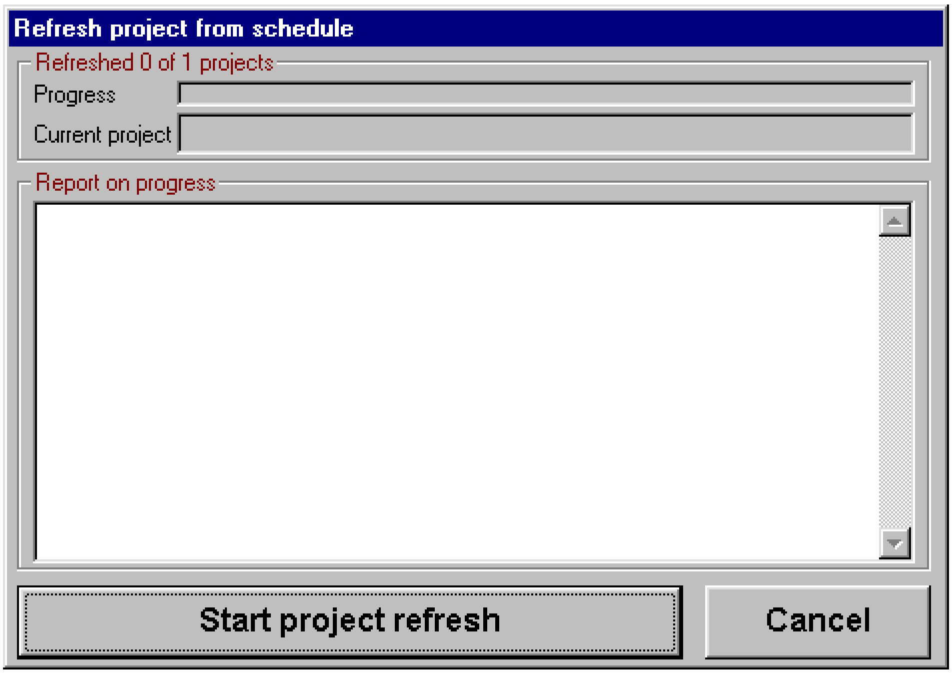
The properties button will display the details screen showing the properties of the project selected in the list. This can also be invoked by double clicking (or single click if you have the option selected) on the project you want to view.

Open a project

This button will open the selected projects schedule (.mpp) file if there is one specified in the project administration details.

Refresh a project

This button will refresh the project details in the database if you are the manager of the project or an administrator. This is done by reading the MS-Project schedule file (.mpp) set up in administration details. A form is displayed showing the progress of the refresh.



Refresh all projects

If you have administrator security then you can refresh all the projects in the summary list. This is useful if you are about to run a general status report on all projects.

Views

You can view the list of projects using one of the view buttons. The project icon changes depending on the status of the project and its confidence level. There are four to choose from:

- Large icon view - shows projects as large icons.
- Small icon view - shows projects as large icons.
- List icon view - shows projects as a list of icons.
- Report view - shows details of the projects.

In the report view you can also sort the projects by clicking on the appropriate column header.

Search for projects

You can filter the project list and search for specific projects. Click the search button for the search panel that has the following list options:

- Project name
- Sponsor
- Owner
- Manager
- Status
- Phase
- Programme
- Group
- Priority
- Confidence
- Issues
- ID number

Text fields can be search by simply typing in the word or parts of words that you wish to search for. You can use more than one field to search on. You do not need to add wild-cards (* %) as Project Director does this for you at the end of the text so “fre” automatically becomes “fre%” which searches for anything starting with “fre”; “fred” would be found but “Alfred” would not.

If you need to search for items with a string in the middle then use “%fre”. This will find “Fred” and “Alfred”.

Each list option has “*Any*” as a default. This means any value in that field is acceptable, otherwise choose an option from the list. As soon as the option is changed the list will be repainted with the newly filtered projects.

Priority and Confidence can be set either with the up and down arrows or by typing in the new value. The list will redisplay after using the arrows, after using ENTER in the text boxes or when the text box loses focus (another control is selected). With a long list of projects it may take time to redisplay each time using the arrows, in which case it is faster to type the new value in.

Confidence ranges from 0% to 100% and is read from the confidence summary field.

Priority ranges from 0 to 100, 100 being the highest priority. This is an arbitrary value that allows you to prioritise your projects should you wish.

Report on project list

This option shows the report dialog form where you can choose a report to run. See project reporting. It also shows a drop-down menu of standard reports that your system administrator has added to the list, for example, ‘Status report’. Choosing this option will move you to the report form and automatically display the select report option.

Details view

The details view of a project is shown by either double-clicking on a project or selecting the project from the summary list and using the properties button. These actions will result in the details screen being displayed. The details screen is also displayed when a new project entry is created.

Toolbar

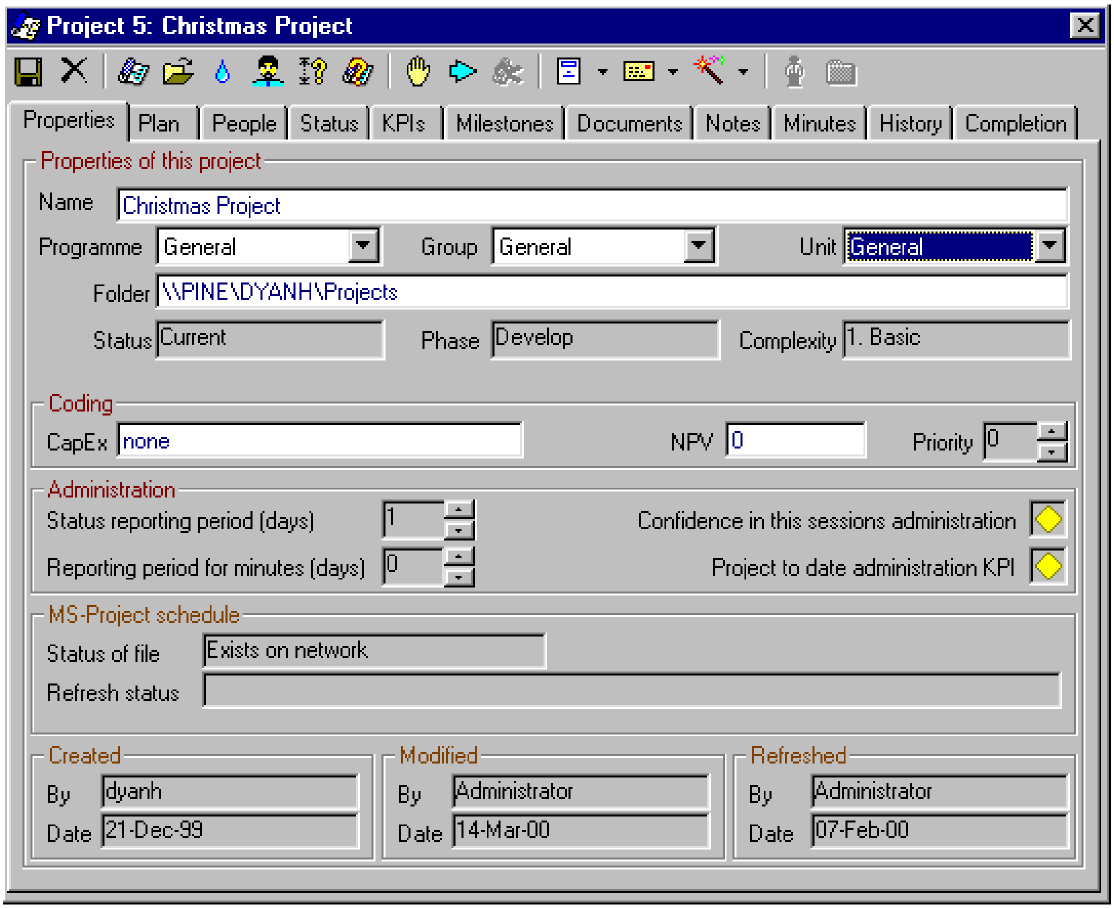
There are several buttons in the toolbar. These may not be available all at once or may be disabled depending on your security rating and the phase and status of the project.

- **Save** – saves any changes and close the details screen.
- **Quit** – will cancel any changes and close the details screen. If you have made some changes you will be prompted to ensure no inadvertent data loss. It will not however cancel any changes made to the notes or actions pages of the project.
- **Schedule** – sets the link to the MS-project schedule file (.mpp) that is kept as one of the documents.
- **Open** – opens the MS-project schedule file.
- **Refresh** – refreshes the project information from the MS-Project schedule file.
- **Expert** – asks the opinion of the expert without refreshing the project information.
- **Resize** – resizes the project by recalculating the complexity and hence the priority of the project.
- **Update status** – updates the status of a simple project by using a wizard.
- **Go ahead** – move the status of the project from new to current.
- **On hold** – places the project on hold, pressing again takes it off hold.
- **Next phase** – once the project is current this will invoke the wizard that will move the project to the next phase and copy any new project templates.
- **Close** – once the project is one the last phase it can be closed using a wizard.
- **Archive** – once the project is closed it can be archived using this button.
- **View report** – will view a report from the selection or a standard report from the list.
- **Mail report** – as view report except that the report is mailed direct to the list of mail recipients. Some elements can be customised, please see the Administration section.
- **Wizard** – customised wizards set up by your system administrator.
- **Person** – will select a person (only enabled if in a person field in people).
- **Folder** – will browse for a folder (only enabled if in the folder field in properties).

The details view has several pages, each of which reveals a group of project information. Click on the appropriate tab and the page will appear.

Properties page

The properties page is shown in the picture below. It allows you to maintain basic information on the project that is used in reports and other areas.



Name
The name of the project.

Programme
The programme (or initiative) the project is being done for. This is a drop down list that is maintained by the Project Director administrator.

Group
The group to which this project belongs. This is normally used as a larger grouping than programme, for example Finance or Engineering.

Unit
The unit to which this project belongs. This is normally used as another sort category like group. This could be used for your customer.

Folder
The project folder on the system, that is a directory specification where all project documents are kept.

Status
The status of the project. The normal status codes are; New, Current, On-hold and Finished.

Phase

The phase of the project. The normal phases are; Analysis, Budget/Bid, Contract, Develop, Execution, Finishing and Goal review.

Complexity
The complexity of the project from simple to complex. This value is reflected in the priority (normally the more complex the project the higher the priority) however this can be overridden.

Coding

CapEx
The capital expenditure or project code associated with the project. This is normally used so you can track project expenditure to a financial system.

NPV
The Net Present Value of the project. This is the value of the project to the business and allows you to compare and sort projects on that basis.

Priority
The priority of the project, ranging from 0 to 100 with 100 being the highest priority and 0 the lowest. This field allows you to compare and sort projects on a priority basis.

Administration

Status reporting period (days)
Sets the period in days for the status reports. This is used to measure how often status reports are sent out by the managers, this in turn reflects in the administration KPIs. For example, if this were 7 then the manager would be measured against sending a status report out every 7 days. This is measured when the mail report button is used. If set to 0 this field is disabled.

Reporting period for minutes (days)
As for status reporting but the measure is for minutes.

Confidence in this sessions administration
A balanced score card indicator for this sessions administration calculated by the project expert.

Project to date administration KPI
A cumulative version of the "Confidence in this sessions administration" KPI. This is used for judging the overall confidence of the project.

MS-Project schedule

Status of file
The status of the MS-Project schedule file, blank exists etc

Refresh Status

The status of the last refresh attempt on the schedule file. This should normally be success but will contain any errors such as the file does not exist.

Created

Shows who the project was created by and the date.

Updated

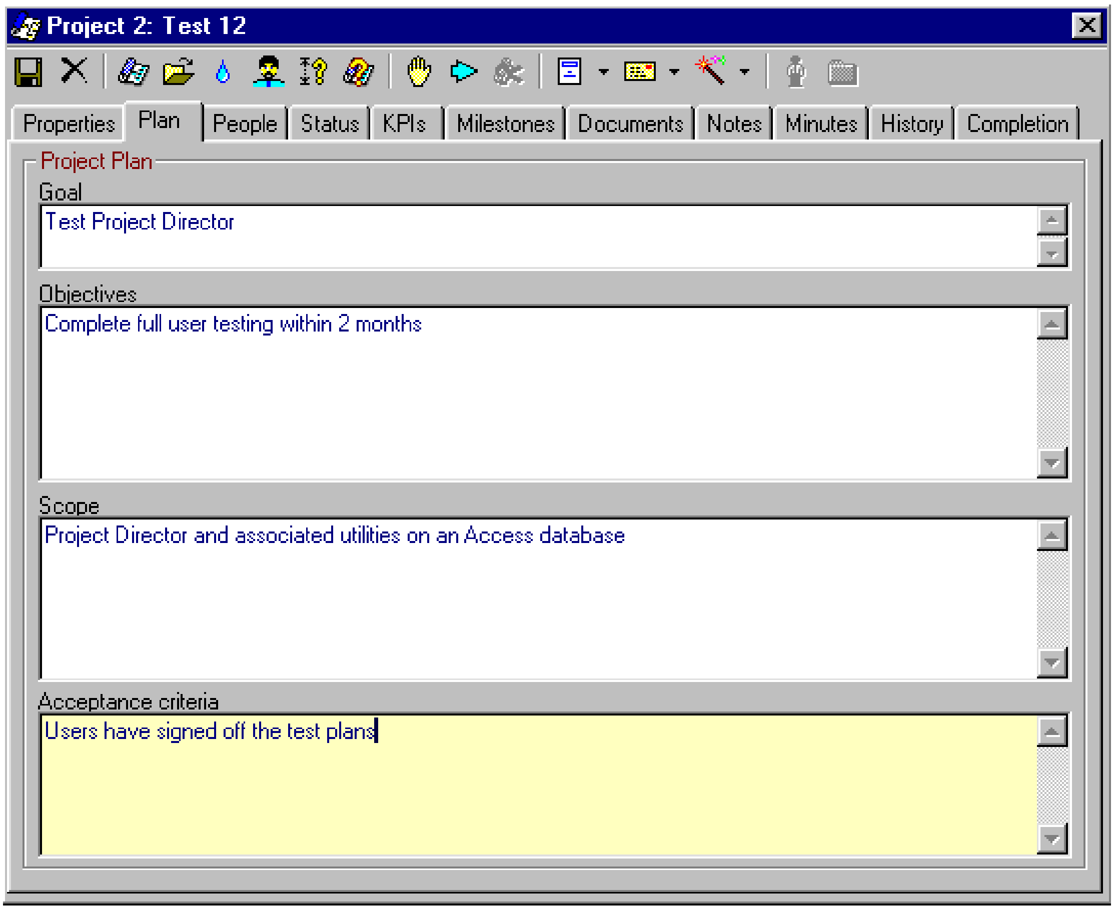
Shows who the project was updated by and the date.

Refreshed

Shows who the project was last refreshed by and the date.

Plan page

The plan tab takes you to the plan page. This would normally be the minimum information required to do a project. That is, why are you doing it, what are the objectives and scope and what are the conditions by which the project will be accepted by the sponsor?



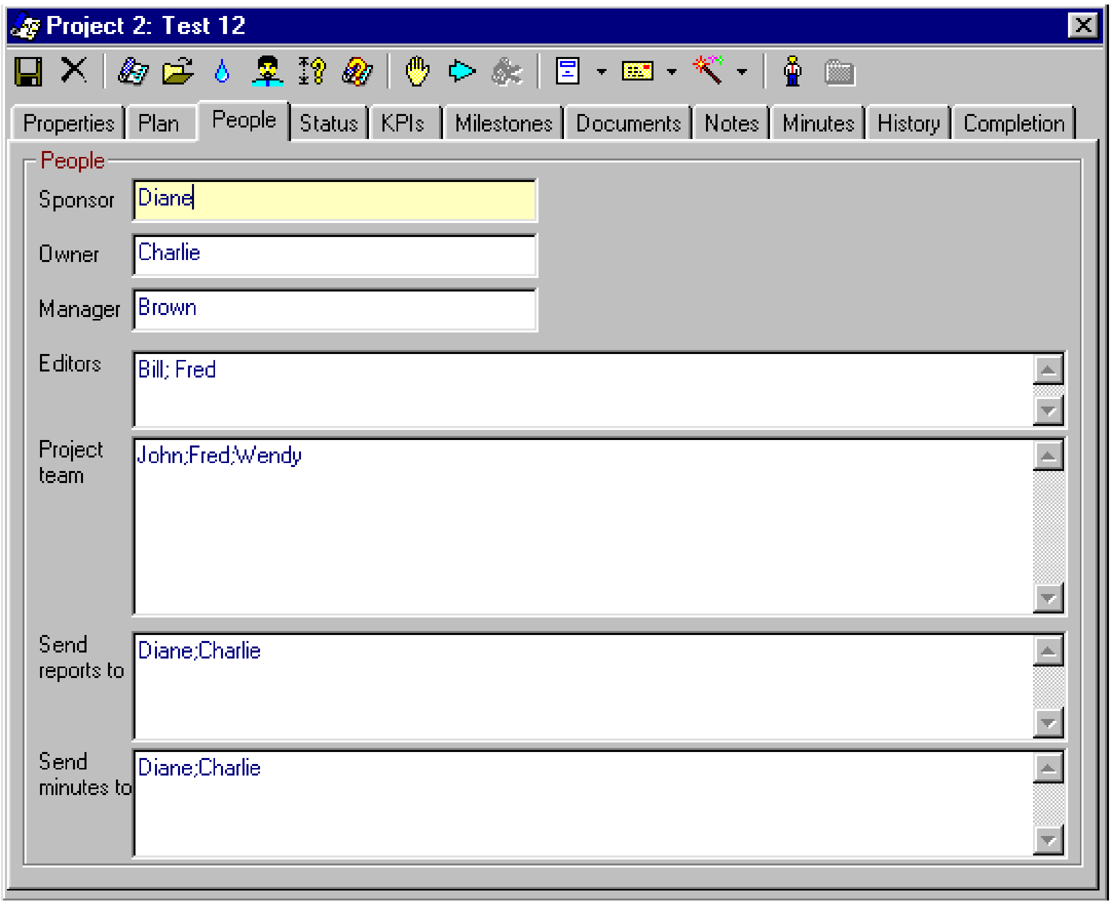
Goal
The goal of the project. This should be a short paragraph on the main reason for doing the project.

Objectives
The objectives for doing the project. These are more detailed than the goal and describe the things that you want to achieve by doing the project.

Scope
The scope of the project; to what areas does it apply; what are we going to impact by doing the project?

Acceptance criteria
What are we delivering to the sponsor by which they will accept the project as having achieved its goal?

People page
The people page shows all the fields to do with people associated with the project. These can be filled either by typing in directly or using the people button on the toolbar to browse for a person in the list of users or from the e-mail system. An example screen is shown below:



Sponsor
The name of the sponsor of the project. The sponsor is the person who requires the project to be done but is not involved on a day-to-day basis.

Owner
The name of the owner of the project. The owner is the person who owns the day-to-day running of the area the project affects.

Manager
The name of the project manager.

Editors
The names of additional people who you want to be able to edit the project.

Project team
The names and functions of the members of the project team can be entered in this field.

Send reports to
The status report will be e-mailed to this list of people when choosing the e-mail report, status report. This will update the status report last sent field that is monitored by the expert. *NOTE: these names should be resolvable by the e-mail system so only full names should be used otherwise the mail will not be sent to anyone. For example use 'sales@VirtualWorlds.co.nz' not just 'sales'.*

Send minutes to
As with the status report you can set up a list of people who should receive the minutes of meetings.

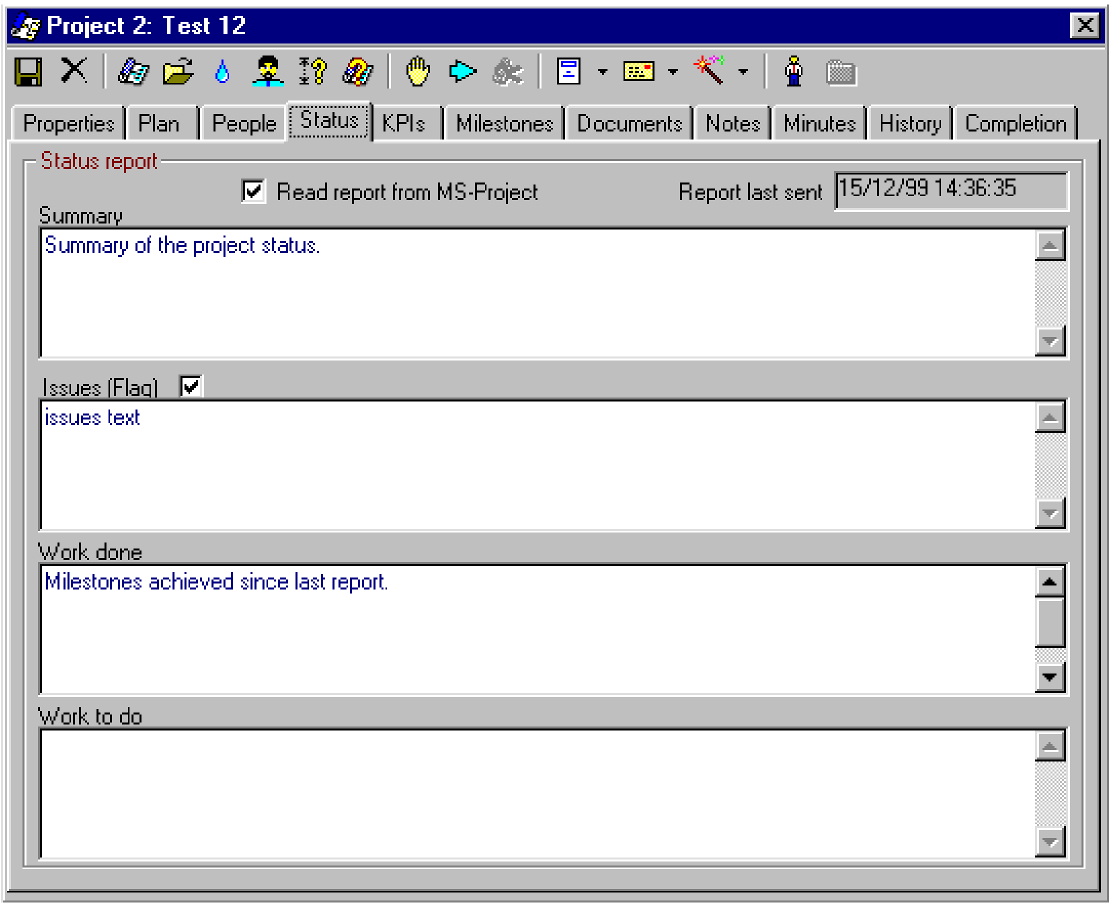
Status page

The status page shows the latest status report on the project. There are two ways the report data is obtained:

1. The data is input directly into the fields of the page by the project manager if they are using Project Director.
2. The data is input into the comments field of the MS-Project file by the project manager and read and parsed by Project Director. This separates comments into the four fields by their title. If no data is present then the fields are left blank.

Option 2 is only used if the check box “Read the report from the project” is selected, otherwise, the text typed into the report fields is used. *Note: If the option is selected then the report will be overwritten each time the project is refreshed.*

The picture below shows an example page:



Read report from MS-project
The option forces Project Director to use the project "properties, comments" field for the report. This field is parsed to select the "Summary, Issues, Work done and Work to do" categories.

Setting this option will mean that the fields will be overwritten with information read from the MS-project schedule when a refresh is performed.

Project Director does this by searching for keyword titles and extracting that text to the report fields already set up. This text can be tailored by an administrator in the set up view. The default settings are:

- **Summary** - a project status summary.
- **Issues** - any issues with the project at present.
- **Work done** - what work has been done in this reporting period.
- **Work to do** - what work is planned for the next reporting period.

Report last sent
Show the date the report was last e-mailed to the appropriate people on the list. This is set when the e-mail menu option 'Status report' is selected.

Summary
Shows the report on the status summary.

Issues
Shows any issues with the project that are unresolved.

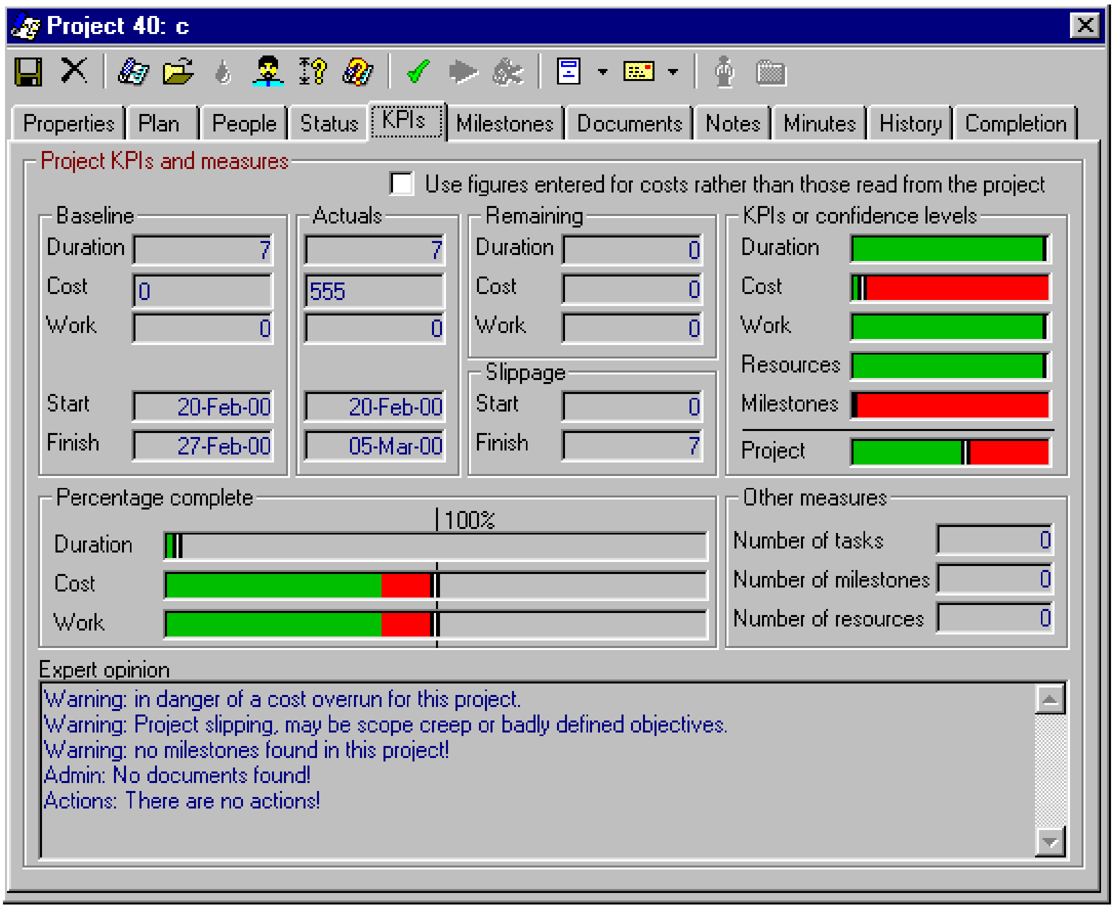
Issues (flag)
Setting this flag raised that the issues are significant and the manager wishes to flag them with the project steering committee for example. There is no direct mechanism for doing this, however, normally a report is written to select only the flagged projects or this can be viewed by selecting the flag in the summary view.

Work done
Shows the work done this period.

Work to do
Shows the work that is intended for next period.

KPIs page

The measures page shows the project Key Performance Indicators (KPIs) by which you can judge how well the project is being run. These are generated by an expert system within Project Director that reads from the file set up in the Administration page when the **Refresh** button has been pressed for this project.



Use figures entered

This option allows you to enter cost figures manually rather than use the figures from the MS-Project schedule. This is normally used if you have a separate accounting or purchasing package which contains actual spend figures. When selected the cost measures become text boxes which can accept user input. Enter the appropriate figures and the other calculations remain the same.

Baseline

The *baseline* frame contains baseline or budget information on the project. These will be overwritten if the project is re-baselined (see MS-Project help on project baselines). A baseline is simply a set of figures defining how you expect you project to run. The project measures and confidence levels are then calculated against this information. For example, the baseline cost (or budgeted cost) for the project may be $100,000 - this is what you would expect to spend on the project.

Note: The KPI and confidence level calculations all require that the project is baselined to be meaningful.

Actuals
The *actuals* frame shows the actual resources already used by the project. For duration, cost and work these are pure numbers in the same units as MS-Project (normally, minutes, dollars and minutes respectively).

If you have chosen the option “Use figures entered for cost” then the cost actuals needs to be entered.

Remaining
The *remaining* frame shows the resources remaining to the project if it is to remain on track and to budget. Duration, cost and work are shown here. This is calculated by “Remaining = Baseline - Actuals”, so if the amount is negative then you are already over budget on the project.

Slippage
The difference between the baseline and actual start and finish dates represent the slippage to the project. The start date can slip (late staring the project) or the finish date can slip (late finishing the project) or both. This is measured in days. For a well run project these should both be zero.

KPIs or confidence levels
Project Director monitors five basic key performance indicators (KPIs) of the project:

- **Time** – the progress of the project in time compared to the baseline.
- **Cost** – the cost of the project compared to the baseline.
- **Work** – what work has been done compared to the baseline.
- **Resources** – resources that are working on the project. How many are over utilised ?
- **Milestones** – the milestones read from the MS-project schedule. How many are late ?

From the project measures basic confidence levels are calculated. These assume that the project uses up resources at a constant rate through time. For example, if you are half-way through the project you would have assumed to have used up half the budget and done half the work. If this is not so then the confidence levels are adjusted.

If the budget is as expected then Project Director has 100% confidence that the projects will meet its budget. Similarly, if the work is as expected, Project Director has 100% confidence that the projects will meet its work target.

The total project confidence is the average of the three confidence levels.

Note: if the project does not use its resources in a linear fashion then the confidence levels should be reviewed. For example, a project such as a PC rollout may have much of the work and expense in the final few days of the project as only a few people do much of the preliminary work.

Percentage complete

The percentage complete frame shows graphically how complete the project is. Each dimension (duration, cost and work) is shown compared to its final level, denoted by a black bar towards the right of the bar. If the resource is better than expected then the line bar shows green for the amount, otherwise it will show red.

Other measures

The other measures frame shows some additional KPIs that Project Director examines. These are:

- Number of tasks - the more tasks the project has the more complex it is.
- Number of milestones - as milestones are an important factor in monitoring a projects progress these are measured and tracked.
- Number of resources - the more resources the project uses the more it needs to be well managed.

Expert opinion

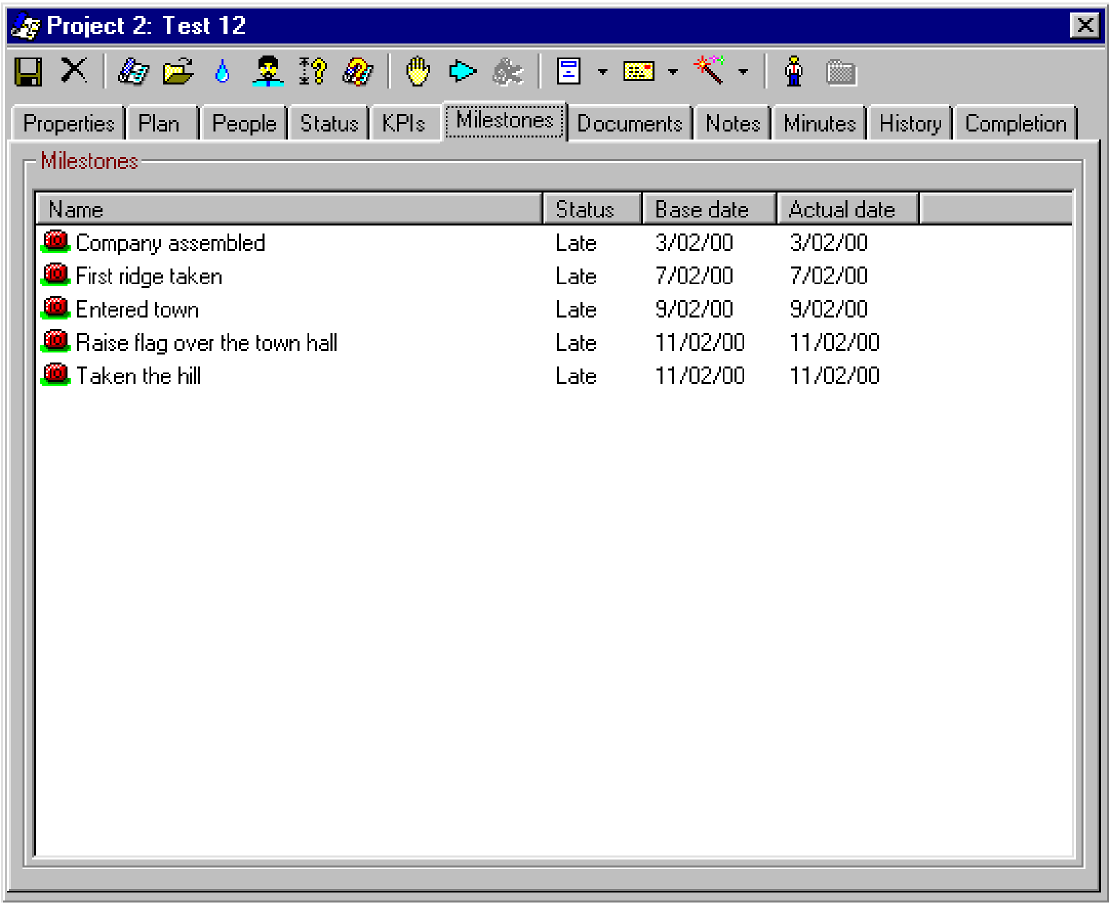
The Project Director makes a comment on the project depending on the KPIs and confidence levels shown in the measures page. These comments are meant for guidence only and do not appear on the project status report (unless you modify the standard status report).

Milestones page

The milestones page shows the project milestones and whether they have been accomplished or not. Any milestones that are due and have not been completed are highlighted in red, completed milestones are shown with a tick.

This is a quick and easy way to see whether a project is meeting its committed milestones.

These milestones are completely re-drawn when the MS-Project schedule is refreshed.



Documents page

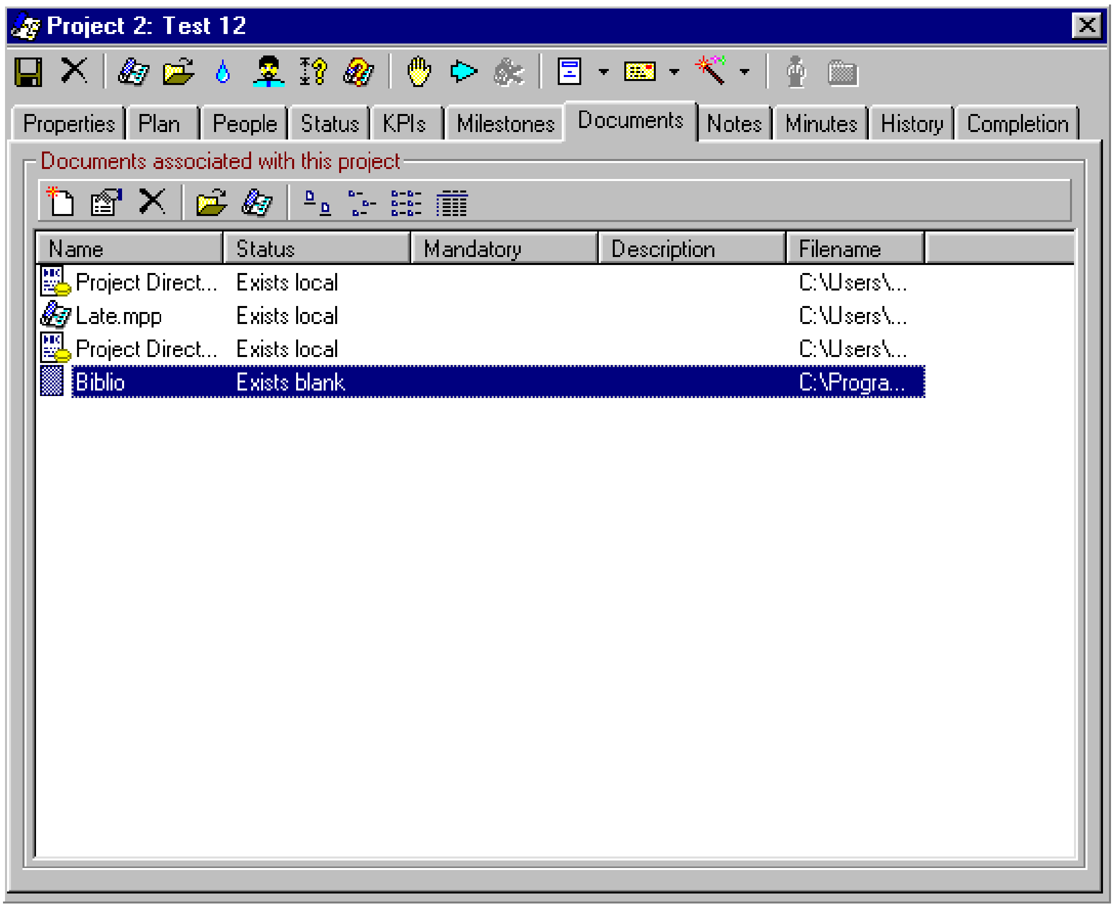
Project Director also keeps track of all your project documents in one central place. Because this is visible to everyone it avoids people keeping their own copies of the documents.

The documents can only be added or removed by the project manager or an editor.

Every type of document can be filed here as the system only keeps a pointer to the actual document. Similarly, when a document is removed only the link is removed, the original still exists.

Whole directories can be stored here, however, the documents they contain will not be monitored by Project Director. A better way is to set up the project folder within Project Director and use the templates.

The next phase wizard will add project documents to the list depending on how your administrator has set them up in the templates form.



Document toolbar

The document page has its own toolbar, each button is described below.

New document
Creates a new entry in the database. This prompts for filename (including network path) and name of the document. This can also be done by the drag-and-drop method from Explorer.

Document properties
The document properties button allows you to view and edit the filename and name of the document link.

Remove document
Removes the document link. Note: it does not delete the original document.

Open document
This button allows you to open and view the document. This can also be done simply by double clicking on the document icon. The will run the appropriate editor, for example, *file.doc* will run MS-Word show the document contents.

Note: The Project Director security does not extend to the network operating system. A user who has only read access to the project file can open the file and modify it if the network operating systems allows. Similarly, they may not be able to open the document at all if it is stored in a secure location. To change this ask your network or system administrator.

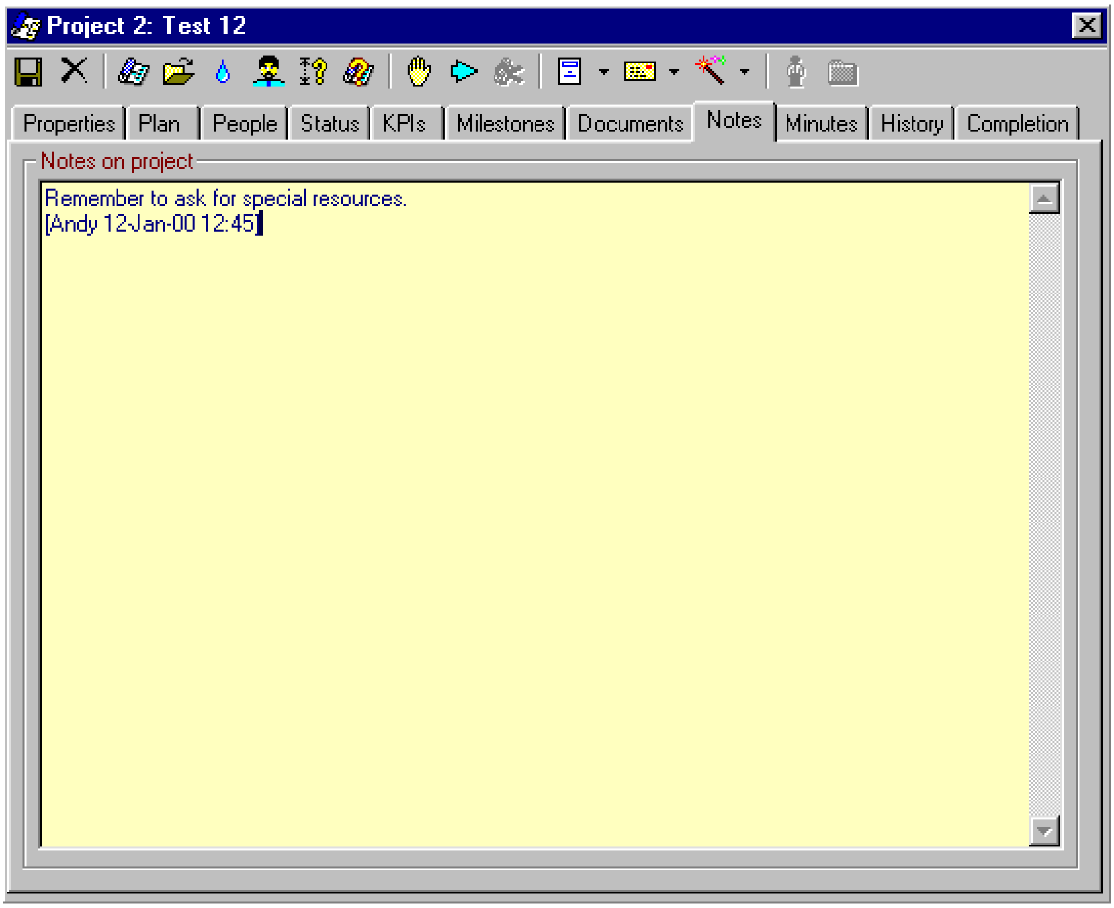
Set selected document as MS-project schedule
This button sets the currently selected document as the MS-project schedule. This should be a '.mpp' file and will update the field in the properties page. If there is no .mpp file currently selected it will be set when a new .mpp link is added. This is shown in the list by the special project icon.

Notes page

The notes page allows you to keep detailed notes on the project that are available to all. These notes are free format and can be used to keep track of issues or decisions etc.

Each additional note is data and time stamped and has the authors name attached.

Notes are also used by the Expert when moving to the next phase. A note will be added with all the new documents that have been created (or failed to be created) from your templates.



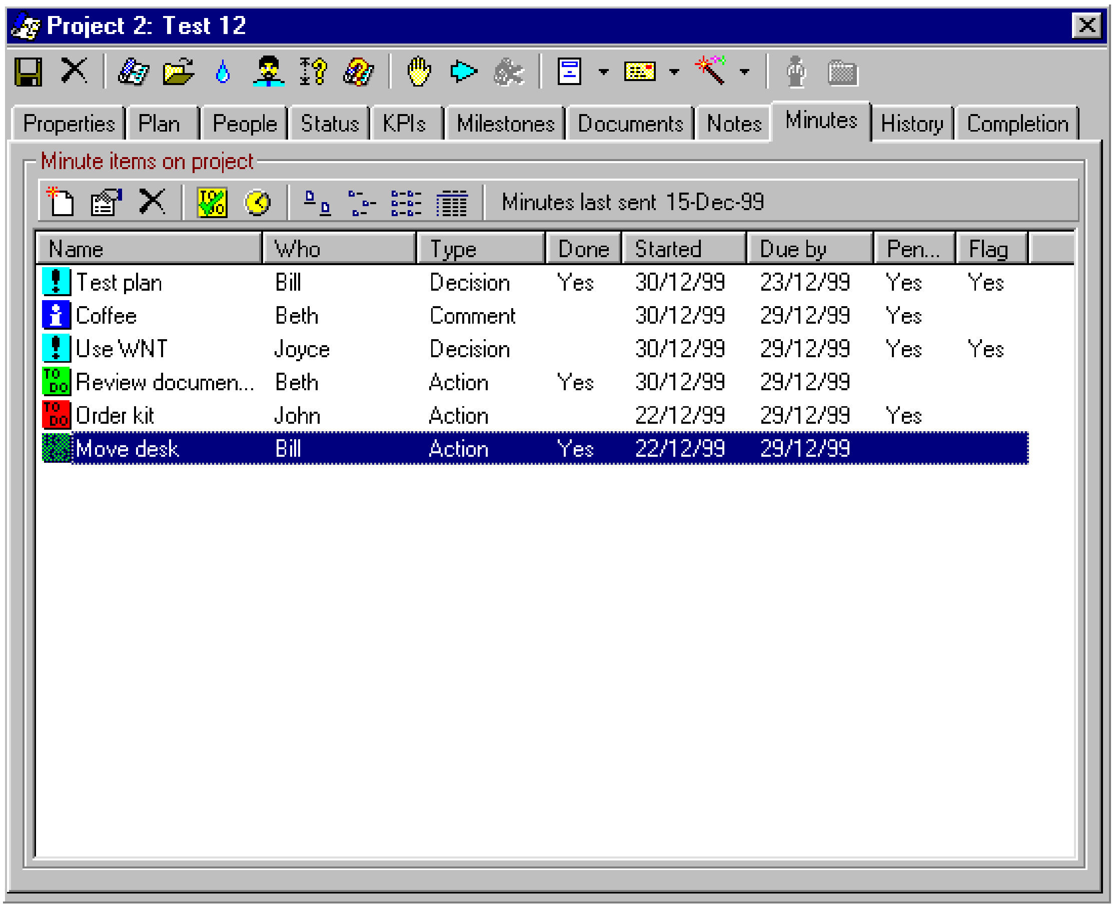
Minutes page

The minutes page allows you to keep track of project actions, decisions and comments so everyone can view them. These act like post-it stickers as they are always attached to the project.

As shown in the example, the icon changes from "*To do*" to a red background if it is overdue. When complete it receives a tick.

The action can be allocated to the Steering Committee if required. This means that if an overall committee (normally called a "Steering Committee") review the project as well the actions can be separated.

The view shows who the minute item is for, the name of the minute, the start date and the due by date. It also shows the pending flag and the raised flag. Click on any column and the actions will be sorted by that column.



Buttons

New minute

This button creates a new minute.

Minute properties
Use this button to edit minute properties. This can also be done by double clicking on the icon you wish to edit.

Remove minute
This removes the minute from the database. If you wish to keep the minute you should use the completed minute button.

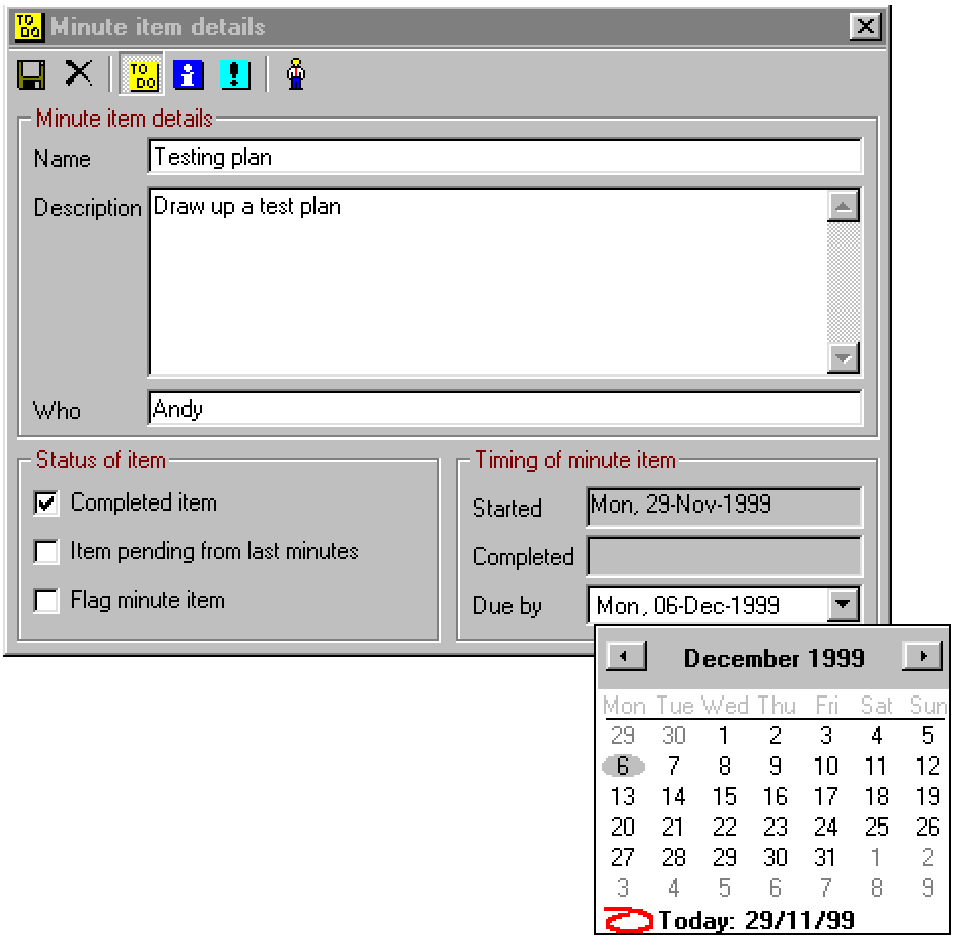
Complete minute
Use this button to mark the selected minute as complete. This can also be done in the minute details form.

Mark previous minutes as pending
The button will mark any previous minutes as outstanding. This is used to keep track of new minutes just started this session if you want your minutes to separate these. The normal usage would be before your project meeting to click this button then add any new actions, decisions and comments.

Minutes last sent
This shows the date the last set of minutes were sent by e-mail using the e-mail minutes button. The expert system uses this date and the minutes reporting period to determine how well the project is being run.

Minute details

The minute details screen allows you to add new actions, decisions and comments and edit existing ones. The screen is shown below:



Toolbar

The minute item has its own toolbar with the following buttons:

Save

Save the minute item.

Delete

Delete the minute item.

Action

Mark the minute item as an action item. For example, "Find out the pricing for the new yacht".

Comment

Mark the minute item as a comment item. This is used to record comments made within meetings, for example, "The budget for next year will be set 10% higher."

Decision

Mark the minute item as a decision item. For example, "It was decided to postpone the go live date to 1st January".

People
The who field requires a person's name. This button will be enabled if the who field is selected, clicking will show the people dialog.

Fields

Name
A short name for the minute item.

Description
Free format text describing the action required.

Who
The person who will be responsible for completing the action.

Completed item
Use this option to mark the minute as complete. This can also be done by using the completed minute button on the menu.

Item pending from last minutes
The item was created at the previous meeting and has been marked as such. This is only used to differentiate between new and old items.

Flag minute item
This marks the action as being associated with the steering committee. This is mainly used for reporting purposes. The steering committee report should include the actions for the steering committee, while the project report may include both

Started
The date the action has been created.

Completed
The date the action was completed.

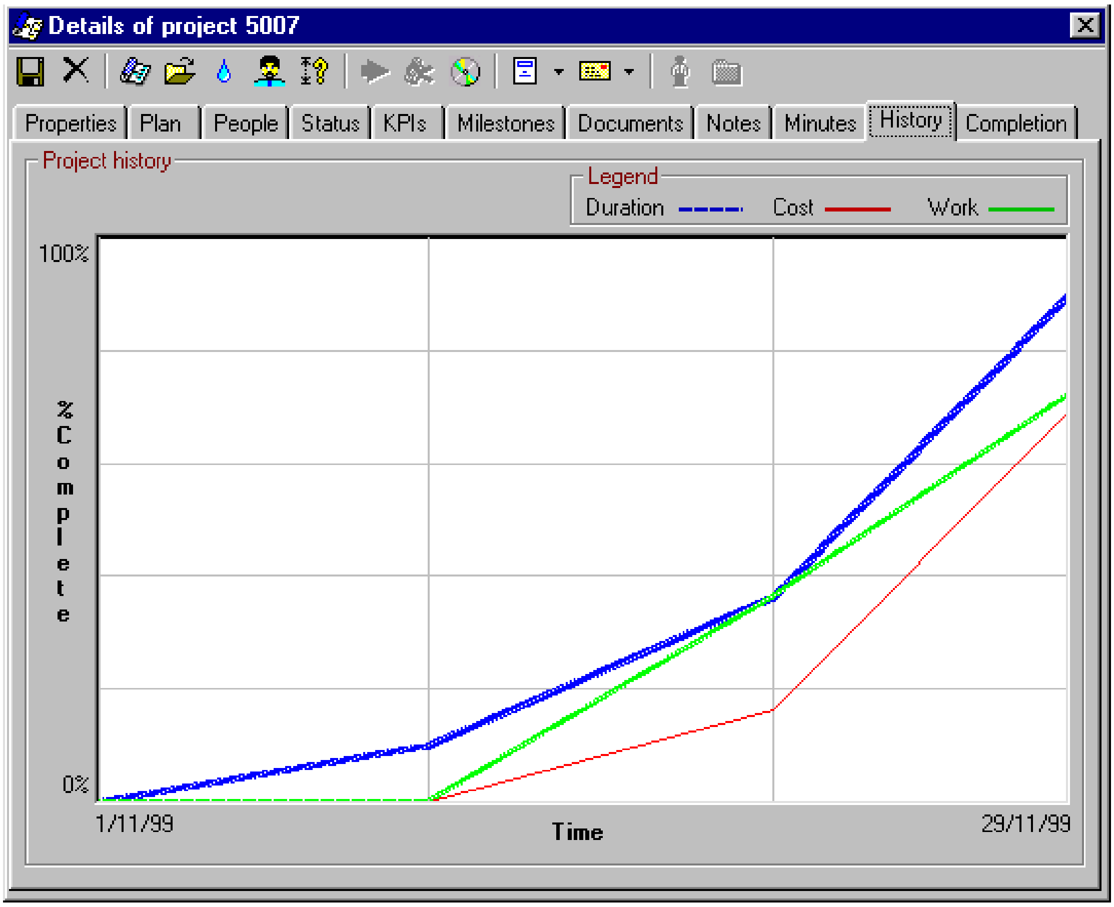
Due by
The date the action is due by. This defaults to one week after the current date but can be changed. It is changed using the date picker control.

History page

A graph of the life-history of the project is displayed. The x-axis (horizontal) shows time from the project start to the current date, the y-axis (vertical) shows the percentage complete (0-100%). If a project is going to plan then the lines should be straight from the lower left hand corner to the top right.

The graph plots three variables, Cost, Work and Duration.

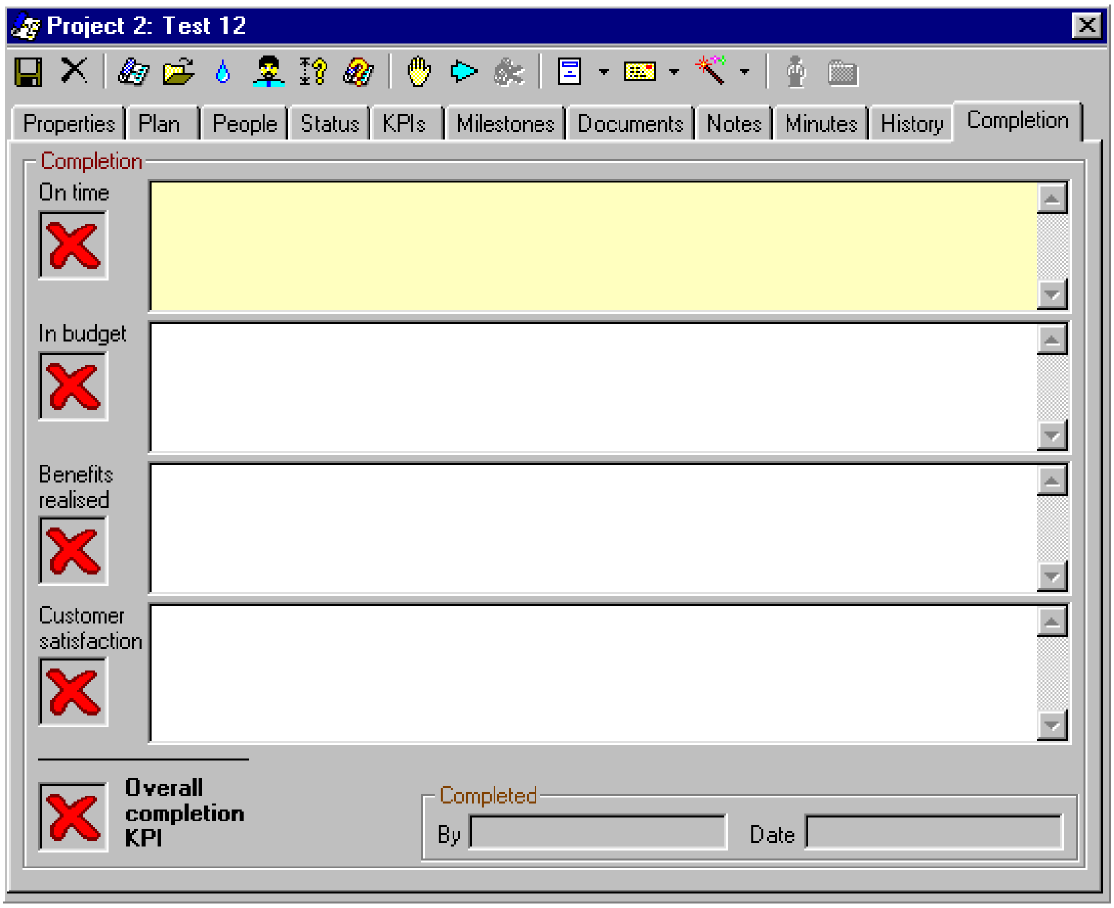
The graph also shows grey vertical bars every time a snapshot refresh was taken of the project.



Completion page

The completion page shows the project as it was completed. The completion wizard makes a judgement based on the project KPIs and the client feedback as to how successful the project has been. This is reflected in a balanced score card and an overall score as shown below.

This is normally filled in using the completion wizard, the button for which becomes visible when the project is in the last phase.



On time

The score card reflects the performance against the baseline finish. The comments may be about what caused a delay if any (mitigating circumstances).

In budget

The score card reflects the actual versus baseline budget. The commentry should be about any variance in spend.

Benefits realised

The score card is set by the client (or auditor) comparing the project results to the acceptance criteria. Comments are made on scope creep etc.

Customer satisfaction

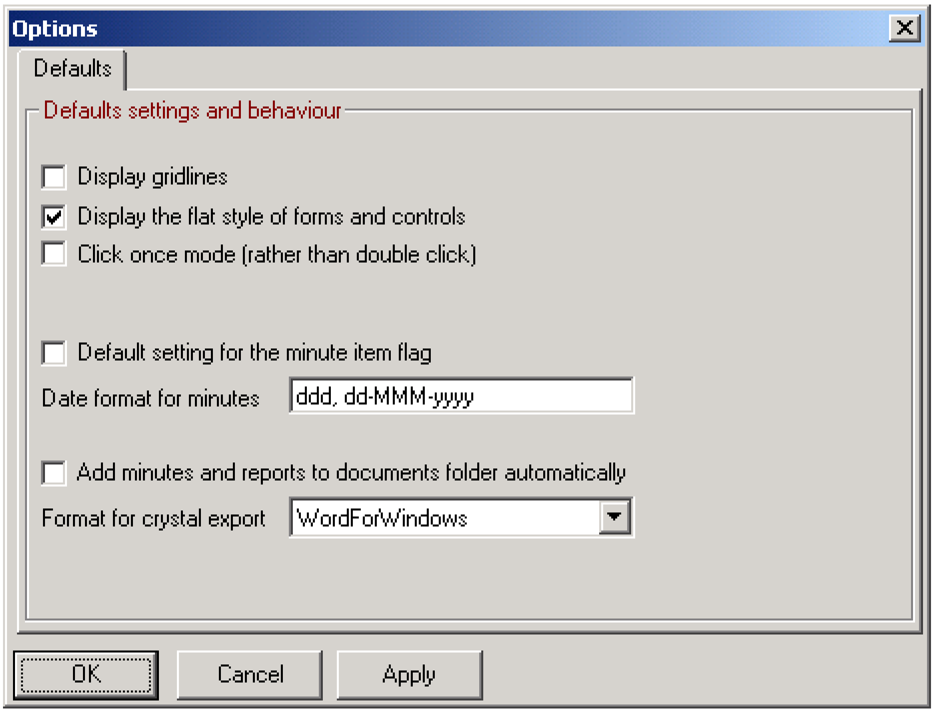
The score card is the rating the owner or sponsor would give to the project and relates to customer satisfaction. Their comments should be attached.

Overall completion KPI
Calculated from the previous four score cards.

Completed
Show when the project was completed and by whom.

Set up view

The set up view allows you to set up your own preferences. Choose ‘Options’ and ‘Set up’ from the main menu, the following form appears:



Display gridlines

Displays gridlines on the list views such as summary and documents.

Display flat style of forms and controls

The old style buttons or the new style flat control buttons can be selected.

Click once mode (rather than double click)

You can either double click on an item or single click to invoke it. Single click means selection is done by hovering the mouse pointer over the item.

Default setting for the minute flag

If you want to default minute items to having their flags set then select this option.

Date format for minutes

The date format that the minutes dates appear in. The form is standard to the windows environment. A long date format is the default.

Add minutes and reports to documents folder automatically

Selecting this item will mean documents that are created when using the e-mail report button are automatically also saved in the projects folder.

Format for crystal export

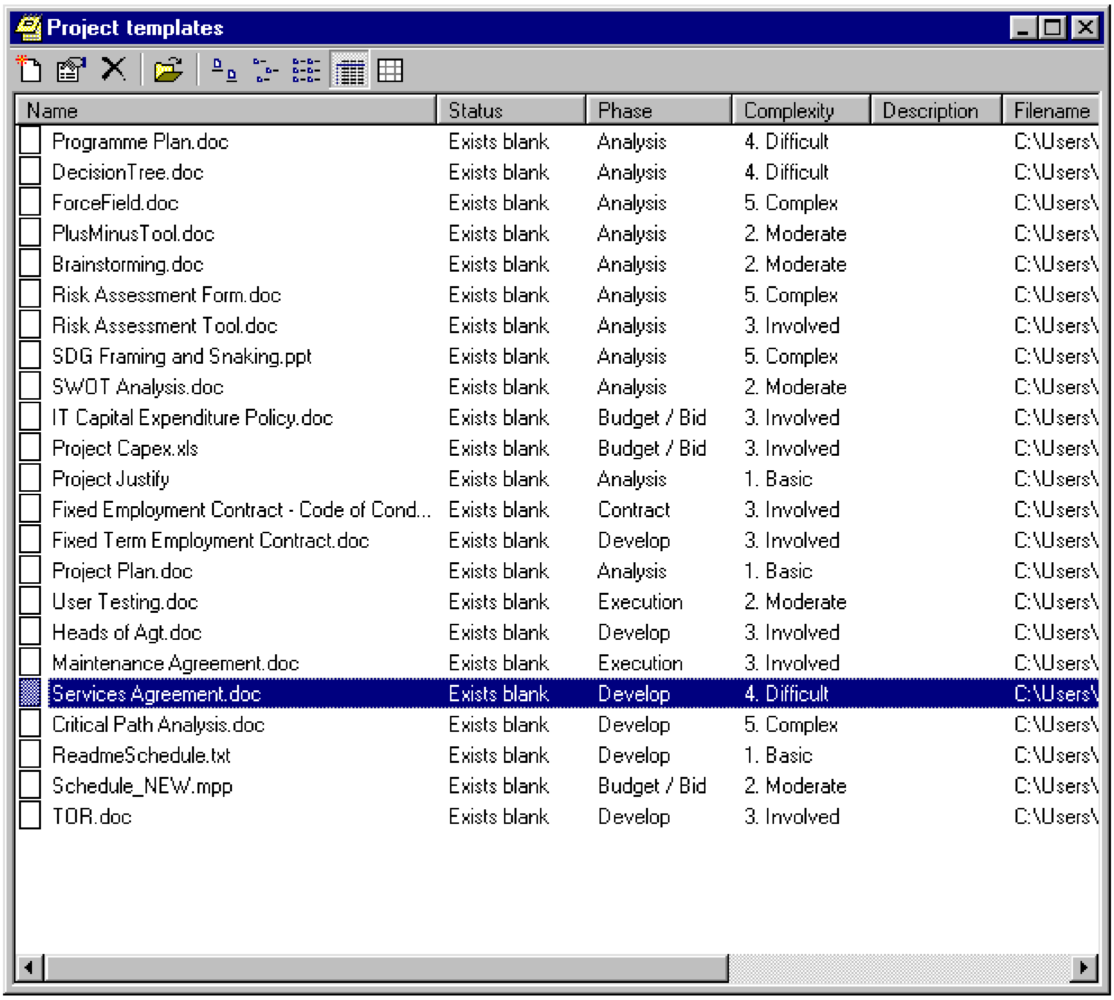
This is the default format used in Crystal Reports when sending a report using email. For example, if “Word for windows” is selected, the report appears as a word attached document.

Templates

Project templates can be set up and stored in the project templates page. This is created and maintained by a Project Director administrator, simply by dragging dropping the appropriate templates on to the form. Once these are set up they are available to all project managers simply by double-clicking on the icon or using the open button.

There are no limit to the number of documents can be stored here, however, it should be kept small if people are to find their way around.

Administrators see three more button than normal users. These buttons are *new template*, *Temple properties* and *remove template*.



Name	Status	Phase	Complexity	Description	Filename
Programme Plan.doc	Exists blank	Analysis	4. Difficult		C:\Users\
DecisionTree.doc	Exists blank	Analysis	4. Difficult		C:\Users\
ForceField.doc	Exists blank	Analysis	5. Complex		C:\Users\
PlusMinusTool.doc	Exists blank	Analysis	2. Moderate		C:\Users\
Brainstorming.doc	Exists blank	Analysis	2. Moderate		C:\Users\
Risk Assessment Form.doc	Exists blank	Analysis	5. Complex		C:\Users\
Risk Assessment Tool.doc	Exists blank	Analysis	3. Involved		C:\Users\
SDG Framing and Snaking.ppt	Exists blank	Analysis	5. Complex		C:\Users\
SWOT Analysis.doc	Exists blank	Analysis	2. Moderate		C:\Users\
IT Capital Expenditure Policy.doc	Exists blank	Budget / Bid	3. Involved		C:\Users\
Project Capex.xls	Exists blank	Budget / Bid	3. Involved		C:\Users\
Project Justify	Exists blank	Analysis	1. Basic		C:\Users\
Fixed Employment Contract - Code of Cond...	Exists blank	Contract	3. Involved		C:\Users\
Fixed Term Employment Contract.doc	Exists blank	Develop	3. Involved		C:\Users\
Project Plan.doc	Exists blank	Analysis	1. Basic		C:\Users\
User Testing.doc	Exists blank	Execution	2. Moderate		C:\Users\
Heads of Agt.doc	Exists blank	Develop	3. Involved		C:\Users\
Maintenance Agreement.doc	Exists blank	Execution	3. Involved		C:\Users\
Services Agreement.doc	Exists blank	Develop	4. Difficult		C:\Users\
Critical Path Analysis.doc	Exists blank	Develop	5. Complex		C:\Users\
ReadmeSchedule.txt	Exists blank	Develop	1. Basic		C:\Users\
Schedule_NEW.mpp	Exists blank	Budget / Bid	2. Moderate		C:\Users\
TOR.doc	Exists blank	Develop	3. Involved		C:\Users\

Buttons

New templates

This prompts you for the filename of the template file and the name you wish to call it in the menu. This defaults to the name of the file.

Template properties

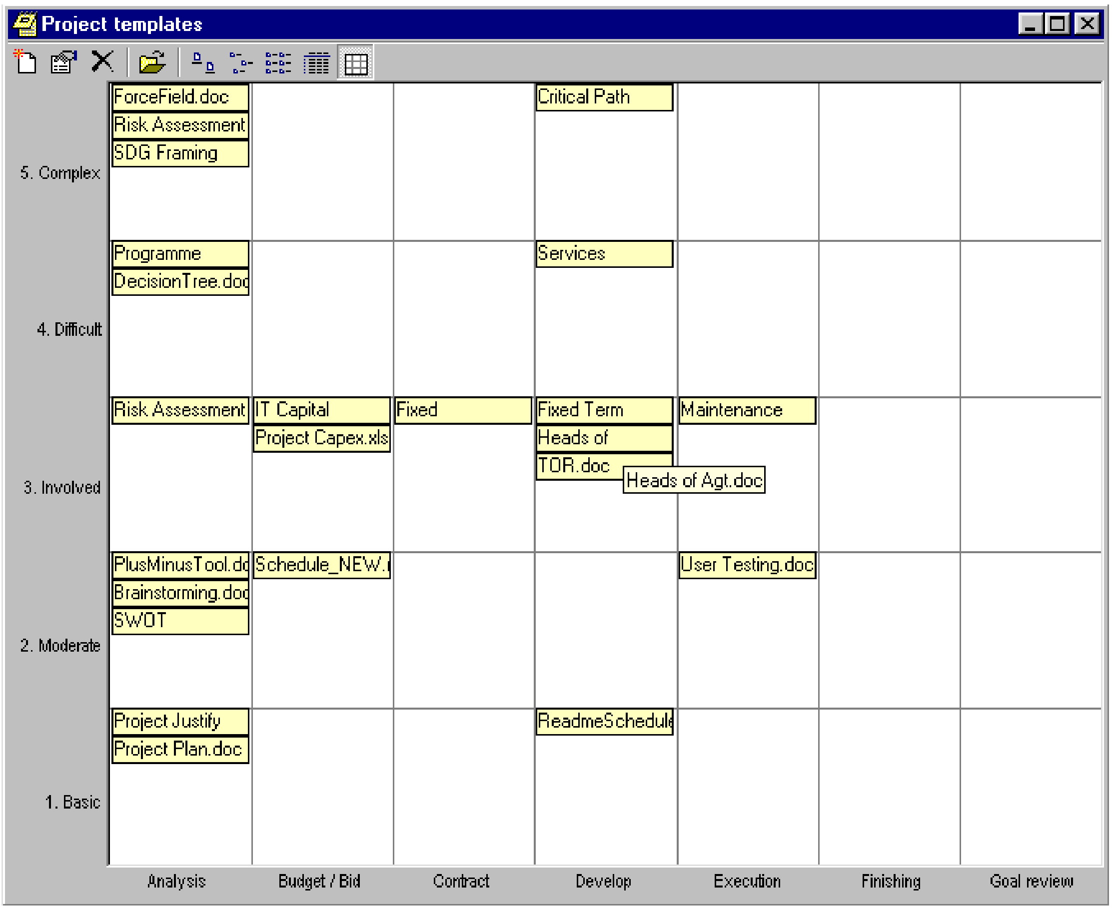
By selecting the template then using the template properties button you can view existing template properties.

Remove template

The remove template button removes the selected template from the list. Note: removing the template does not delete the template file itself.

Map view

The map view shows templates on a map with the X (horizontal) axis being time as shown by the phases and the Y (vertical) axis the project complexity. You can move the templates around the map by dragging and dropping them. You can also drag and drop new template documents from windows explorer.



Reports

The reports form can be shown from the summary or details screens using the *reports* button. There is a difference between these methods. From summary view reports from the summary list can be viewed. From the details screen however, you can run reports on the current report only.

The report form has three purposes:
1. Allowing users to run standard reports against projects they selected.
2. Enabling administrators to set up and maintain standard reports.
3. Enabling users to set up and maintain their own reports.

Reporting is done using crystal reports. The run-time version of this comes standard with Project Director, however, if you wish to write your own reports you need to purchase either Crystal Reports or use something similar like Microsoft Access.

Crystal Reports (or Seagate Info Analysis) is more useful because they integrate into Project Director. That is the selected project or projects will be displayed in the report.

Project Director comes with some standard reports already defined.

Administrators

There are three buttons for administrators to maintain reports. They are *new report*, *report properties,* and *remove report*.

New report
This button allows administrators to add a new report. This may also be done by dragging and dropping from Windows Explorer onto the form.

Report properties
By selecting a report and using the properties button you can view the report properties or modify them.

Remove report
This button removes the selected report. Note: this does not delete the file, it simply removes the link from Project Director to the file.

Report tabs

There are 3 report tabs System reports, My reports and View report.

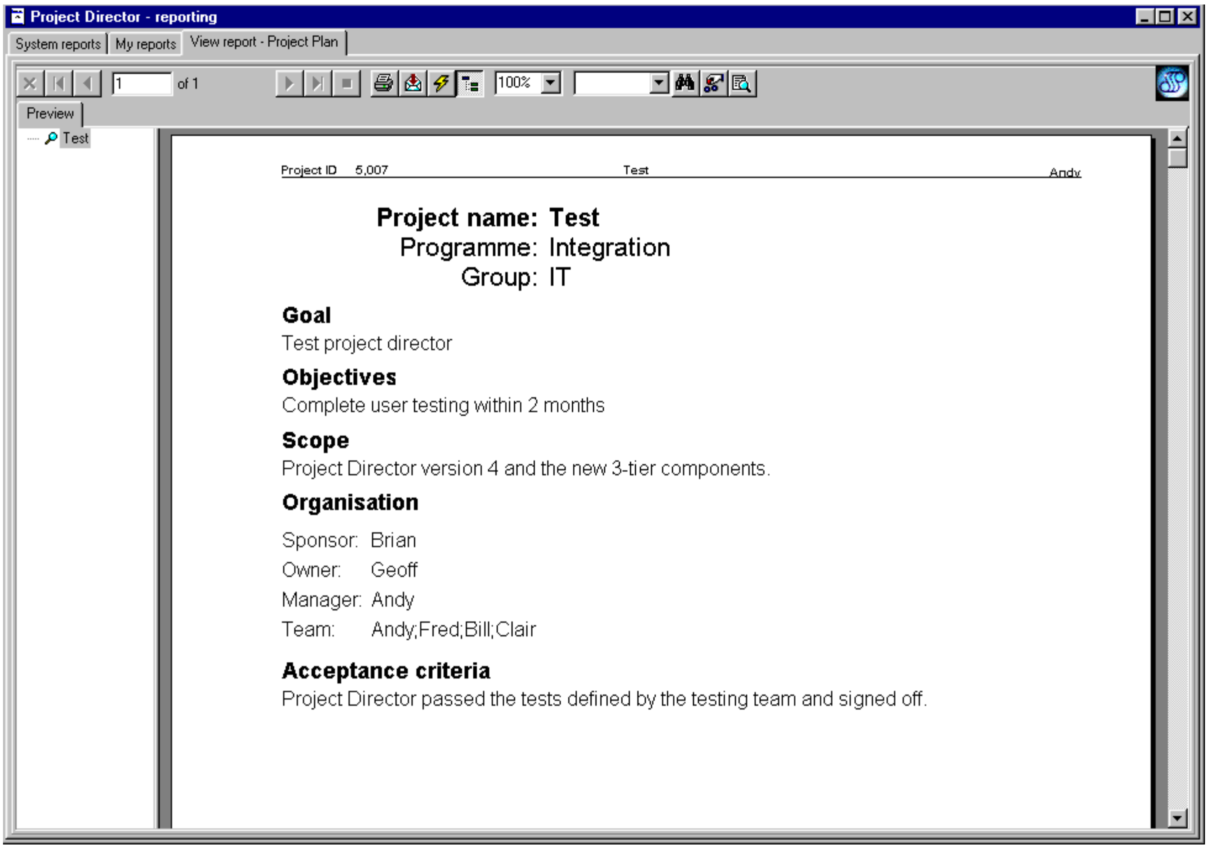
System reports
These can only be set up by an administrator and are available to everyone. This is where the standard reports are kept. Double clicking or opening the report selects the third tab 'View report' and displays the report.

My reports

You can add your own reports that are not available to anyone else by creating the report in Crystal Reports and then dragging the report into this view or linking to it using the new report button.

View report

The report is displayed after selecting a report and opening it. From this screen you can export a report or browse through the pages or print it. An example report is shown below:



Creating a new report

This section describes how to create a new report for use by Project Director. The product used is Crystal Reports (version 9) available from Business Objects.

Procedure

1. Start Crystal Reports and create a new report.
2. Report gallery: choose a report template. The Standard Report Expert should start.
3. Choose Active Data as the data type.

4. Select the data source from the drop down menu. This should be ProjDir unless your system manager installed it with a different name. It may be a test database set up specifically so you can write reports (see database). **Click next**.
5. Select recordset: you can specify a database user name and password. You also need to choose your recordset. This can be done by writing SQL or choosing an object (which is by far the easiest method). The objects are tables or predefined queries in the database (see Report Tables). **Click Finish**.
6. Choose SQL data: **Click add** to add the project data source to you report then **click Done**. This takes you back to the next step in the Standard report expert.
7. Click next and choose fields, sort and so on.
8. Format and test your report.
9. Save your report.
10. Link Project Director to your report by adding the report to the reports form by either dragging and dropping or selecting it via the browse button. Note: you can add your own reports as a user or set up system wide reports as an administrator.

Database

The database you use can be any ADO (ActiveX Data Object) compatible data source. You do not need to write reports against the live database as Project Director will pass the ADO data to the report at run time depending on the data the user has selected. This is done in two ways:

- The user clicks the report button from with a detailed project view – only the data for that project is passed to Crystal Reports.
- The user clicks the report button from the summary view – all data on projects currently shown in the summary view is passed to Crystal Reports.

Report Tables

When writing reports it is important to understand the main sources of data within the Project Director database. These are listed below.

- Actions
- Events
- History
- Milestones
- Projects
- ReportProjects

Most reports should be written against the ReportProjects table which is a query that adds the list names to the recordset. For example, GroupID is a number referring to the ListGroups table, so GroupName is added which is the equivalent text to the number.

Standard reports

There are a few standard reports that are used in the system such as, the Status report and Summary report. These can be modified as can all other reports. However, the standard system reports can also appear on the drop-down report menu.

Your system administrator can set these up by adding the name of the report to the options table in the database.

Item	Category	Value
StandardReportName1	Reports	Status report
StandardReportName2	Reports	Minutes
StandardReportName3	Reports	
StandardReportName4	Reports	
StandardReportName5	Reports	
StandardReportName6	Reports	
StandardReportName7	Reports	
StandardReportName8	Reports	
StandardReportName9	Reports	

The value is the name of the report in the system reports table. If this is wrong an error will occur when the users select the report.

Once a standard report is selected the reports window will appear with the report showing in the view report tab.

Wizards

A wizard is a program run to help a user through a procedure. The wizard is designed to prompt the user using simple questions to obtain the right information to complete the procedure. It may also run a series of calculations and create new entries in the database.

Wizards are run for the following events:

- New project
- Determine project complexity
- Update project status
- Next project phase
- Project completion
- Custom event

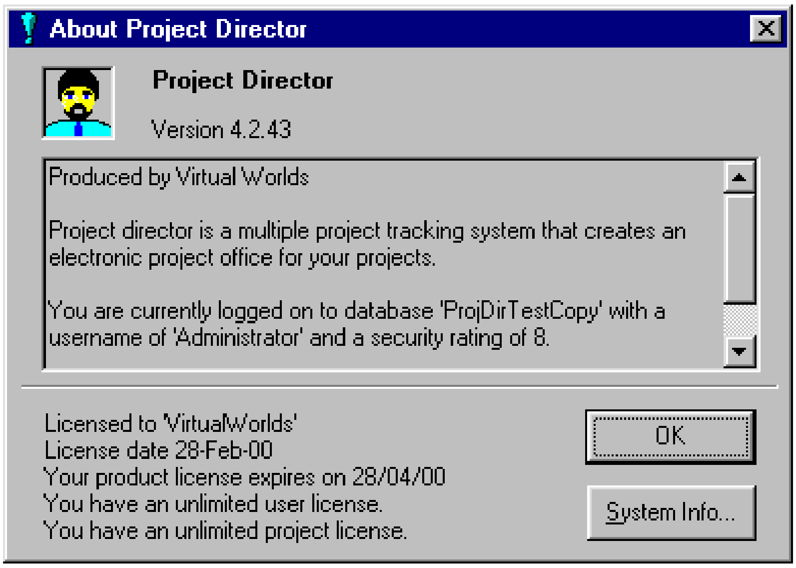
The wizard can be customised to a certain extent to match your organisation or project methodology. To understand how to do this read this chapter thoroughly because a mistake can make the wizard unusable. This should only be performed by Project Director administrators.

Customising the wizard

The wizards can be customised to suit your organisation. This can be done by an Administrator, see the Administrator section.

About Project Director

Using the menu items Help, About Project Director, you can see details of your versions and licenses as shown below:



This will help you with any problems that you may have by contacting your administrator.

Customising Project Director

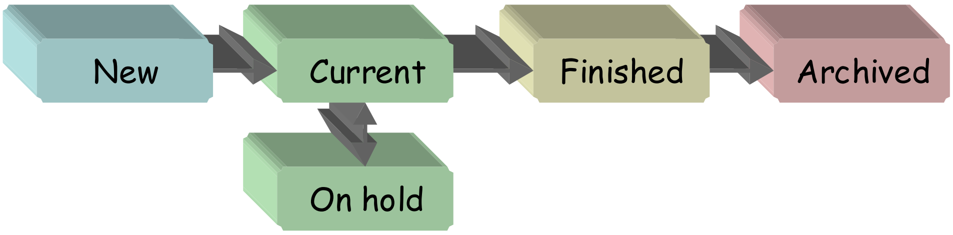
There are several ways to customise PD to your own requirements:

- Templates – add and modify templates (documents, spreadsheets, procedures etc) *[see Templates]*.
- Reports – create and modify reports to suit your organisation *[see Reports].*
- Wizards – create or modify wizards to do specialist tasks *[see Wizards].*
- Lists – add items to lists such as programmes and groups. The status table can not be changed, however new phases can be added or changed. The name of any of the list items can also be changed (for example, phase “Budget” can be changed to “Bid”) *[see VWsysAdmin help].*
- Database fields – can be added to the “Projects” table and accessed by the customised wizard. WARNING: this should only be done by experienced people and a copy of the database be taken before any changes are *made [see Wizards and your database documentation].*
- Database type – an MS-Access database is shipped in the package. This can be converted to your preferred database using whatever import tools are available. For example, the MS-Access database can be converted to SQLserver. Once this is done change the drivers in ODBC set up to point to your new database. As Project Director uses ADO it is database *independent [see Installation guide and your database documentation].*

Project Concepts

Project Life Cycle

The project life cycle is fixed for Project Director in that the status can not be tailored to suit your individual project methodology. However, that should not matter as the project phases can be changed, added or reduced. The life cycle is shown in the diagram below:



New project

A new project is created using the new button from the summary screen or by the new project wizard. The project can be edited and worked on in the normal way until it is ready to be initiated. This is done by clicking on the “Ready to go” button from the details screen. This is normally done straight away for small projects, whereas, for larger projects you may have some more official sign off that the project can start.

Current

This is the normal state of the project, where it goes through its normal life cycle in the project phases. During this phase it may be put on hold any number of times for various reasons.

On hold

The project may be placed on or off hold by using the “Hold” button on the details screen. This does not change the project phase.

Finished

When the project is in its last phase (normally Goal review) it can be finished by using the “Project finishing” button which invokes the wizard. Once this is done the project completion KPIs are calculated.

Archived

Once projects are finished they can be archived. This means they no longer appear in your project lists and reporting. This is useful to keep things tidy and not have many old projects to filter.

ADMINISTRATION

There are several functions that are only available to administrators of the system. For simplicity all installations receive the same files in the installation directory. Only the Project Director icon is added to the Start, Programs menu.

Other programs are:
VWadministrator – allows you to add users to the system, maintain lists etc
VwlicenseManager – manages your site license key.
VWdiagnostic – diagnoses connections to your database from remote locations.
VwprojDirConfigure – configures Project Director on your system.

In addition various options can be set:

- Database options
- Customising wizards
- WindowsLogon
- Alternate database

Database Options

Within the database there is a table called options. This table contains options that allow an administrator to change the way Project Director behaves, looks and feels to users.

Use the VWadministrator program to change the values in this table.

Item	Category	Value	Comments
Xlabel	BostonGrid	Value	The label used on the Boston Grid for the X axis.
Ylabel	BostonGrid	Complexity	The label used on the Boston Grid for the Y axis.
TimeFactor	Completion	1	Used in the Completion KPI calculation for duration. The factor multiplies the project duration to get the maximum over time allowed before the KPI drops to 0. For example, if the project was 100 days then a factor of 0.5 would only allow 50 days late before the KPI was 0.
CostFactor	Completion	1	Used in the Completion KPI calculation for cost. The factor multiplies the project cost to get the maximum over budget allowed before the KPI drops to 0. For example, if the project was $1,000 then a factor of 0.5 would only allow $500 overspend before the KPI was 0.
ProjectConfidenceRegime	Expert	A	See expert system
ProjectUpdateWarningPeriod	Expert	7	Default warning period in days.
ConfidenceWorkWarningLimit	Expert	0.8	0 to 1 (0 to 100%) limit below which warnings are issued about Work in the expert system.
ConfidenceCostWarningLimit	Expert	0.8	0 to 1 (0 to 100%) limit below which warnings are issued about Cost in the expert system.
ConfidenceDurationWarningLimit	Expert	0.8	0 to 1 (0 to 100%) limit below which warnings are issued about Duration in the expert system.
ConfidenceProjectWarningLimit	Expert	0.8	0 to 1 (0 to 100%) limit below which warnings are issued about Project confidence in the expert system.
ConfidenceWorkReviewLimit	Expert	0.6	0 to 1 (0 to 100%) limit below which warnings are issued that the project should be reviewed.
SlippingProjectWarningLimit	Expert	7	Number of days after which warnings are issued on the project completion date.
ProjectAdminTitle	ExpertOpinion		Title for the admin section of the expert opinion.
NoFolder	ExpertOpinion		Text shown if no folder specified.
NoSponsor	ExpertOpinion		Text shown if no sponsor specified.
NoOwner	ExpertOpinion		Text shown if no owner specified.
NoGoal	ExpertOpinion		Text shown if no project goal specified.

NoObjectives	ExpertOpinion		Text shown if no project objectives specified.
NoScope	ExpertOpinion		Text shown if no project scope specified.
NoAcceptanceCriteria	ExpertOpinion		Text shown if no project acceptance criteria specified.
LowerCostMargin	ExpertOpinion	0.1	0 to 1 (0 to 100%) Actual costs are lower than expected at this point in time by x%.
CostsLowerThanExpected	ExpertOpinion		Text displayed if the LowerCostMargin warning is issued.
NoReportEmailTo	ExpertOpinion		Text shown if no list of people exists to receive emails about project status reports.
ProjectFinishOverduePeriod	ExpertOpinion	30	Period in days after which warnings are issued if the project is not closed.
ProjectFinishOverdue	ExpertOpinion		ProjectFinishOverduePeriod warning text.
ProjectStartOverduePeriod	ExpertOpinion	14	Period in days after which warnings are issued if the project is not started.
ProjectStartOverdue	ExpertOpinion		ProjectStartOverduePeriod warning text.
ProjectPerformamceTitle	ExpertOpinion		Title for the performance section of the expert opinion.
NoDocuments	ExpertOpinion		Text shown is no documents are kept for this project.
ProjectOnTrack	ExpertOpinion		Text shown if the project is on track (no warnings issued).
BasicComplexity	ExpertOpinion	0.2	0 to 1 (0 to 100%) limit for a basic project (so some test and hence warnings are not given for basic projects).
DigitsInCapexCode	ExpertOpinion	3	For more complex projects this is the minimum number of digits in the capex code.
NoCapexCode	ExpertOpinion		Text used if the DigitsInCapexCode warning is issued.
NoManager	ExpertOpinion		Text used if there is no project manager specified.
ProductName	License	ProjectDirector4	Product name, leave unchanged.
CompanyName	License		The name of the company the product is licensed to.
LicenseDate	License		Date for the license.
LicenseKey	License		Your key.
HackerProtectCount	Logon	5	Number of failed logon attempts before the user account is disabled.
DueByTimeDefault	Minutes	7	Default number of days until minute items are due from the start date.
DiscountRate	NPV	0.15	The discount rate in NPV calculations. 0.15 is 15%
Periods	NPV	3	Number of periods over which the NPV calculation is run (normally years).
StandardReportName1 … StandardReportName9	Reports		The name of the report that appears on the drop-down menu. You have 9 choices.
StatusReportName	Reports	Status report	Name used for the special status report.
SummaryText	Reports	Summary	Text used for Summary when extracting that section from the MPP file properties.
IssuesText	Reports	Issues	Text used for Issues when extracting that section from the MPP file properties.
WorkDoneText	Reports	Work Done	Text used for Work Done when extracting that section from the MPP file properties.
WorkToDoText	Reports	Work To Do	Text used for Work To Do when extracting that section from the MPP file properties.
NoIssuesText	Reports	None.	Text used if there are no issues in a report.
<Name>Subject	Reports		Email subject line for the report named <name>. For example the Minutes report will have an entry MinutesSubject. Text can be substituted for project parameters: <ProjectName> = the name of the project <MyName> = the name of the user <ReportName> = the name of the report
<Name>Subject	Reports		Email message text for the report named <name>. For example the Minutes report will have an entry MinutesMessage. Text can be substituted for project parameters: <ProjectName> = the name of the project <MyName> = the name of the user <ReportName> = the name of the report
Custom1 … Custom9	Wizard		The name of the wizard to run that appears on the drop-down menu. You have 9 choices.

Customising the wizard

Each wizard is made up of a set of steps. Each step is defined by an entry in the wizard table. Each entry contains the information defined in the wizard table definition.

Wizard table definition

Name	Purpose	Values
WizardID	Unique ID for each entry	Integer
GroupName	Name for the group of wizard entries	String
Step	The step number within the group	Integer
Mandatory	Flag set if the question has to be answered	Yes / No
Name	The name of the wizard step	String
Description	More detailed description of the step	String
Type	The type of step required. A blank step means no action is required from the user and the screen is painted for introduction only, for example, the introduction. Other entries have specific screens requesting information.	Blank “Smiley” “Memo” “Text” “People” “LowMediumHigh” “Folder” “Date” “CheckBox”
Question	The question being asked	String
Action	The action attempted when moving off the screen.	Blank “Save” “Zero” “Sum” “SaveAverage” “Increment” “Next”
Help	Help text if the user requires more information.	String
Table	The table name to store the information	
Field	The field name within the table	
LimitLow	High limit (if any) for the answer	
LimitHigh	Low limit (if any) for the answer	
PhaseID	The ID of the phase	
ComplexityID	The ID of the complexity	

Changing wizard entries

Text can easily be changed in the wizard, simply change the text required. Other entries are more complex. The key ones are described below.

GroupName

The name used to identify all the steps that make up the particular wizard, for example, “Project completion”.

Step

The step number is used to order the questions the wizard asks.

Type

The string defines the type of screen the wizard displays.

Type	Description
Blank	Nothing is displayed apart from the text
“Smiley”	The smiley faces appear and the user can select one
“Memo”	The user can type in large amounts of text
“Text”	The user can type in one line (255 characters) of text
“People”	The user can type in names of people browse for them
“LowMediumHigh”	The user can select a rating for the question based on a low, medium or high scale.

“Folder”	The user can browse for an electronic folder
“Date”	Displays the date picker for the date
“CheckBox”	Displays a check box for a yes / no answer

Action

The action field defines what happens to the answer entered.

Action	Description
Blank	No action taken
“Save”	Saves the answer in the table and field specified
“Zero”	Zeros the counters (used in average)
“Sum”	Sums the values entered (smiley, LowMediumHigh)
“SaveAverage”	Saves the average of the sums in the table and field specified
“Increment”, “Next”	Increment the value in the specified field. Used to move to the next phase for example.

New wizards

You can create completely new wizards by editing the database and using a unique name for the wizard. You can then add that wizard to the custom wizard list that appears on the details screen.

You can also add completely new fields to the database table “Projects” and set the wizard to update and display them even if they do not appear elsewhere in Project Director.

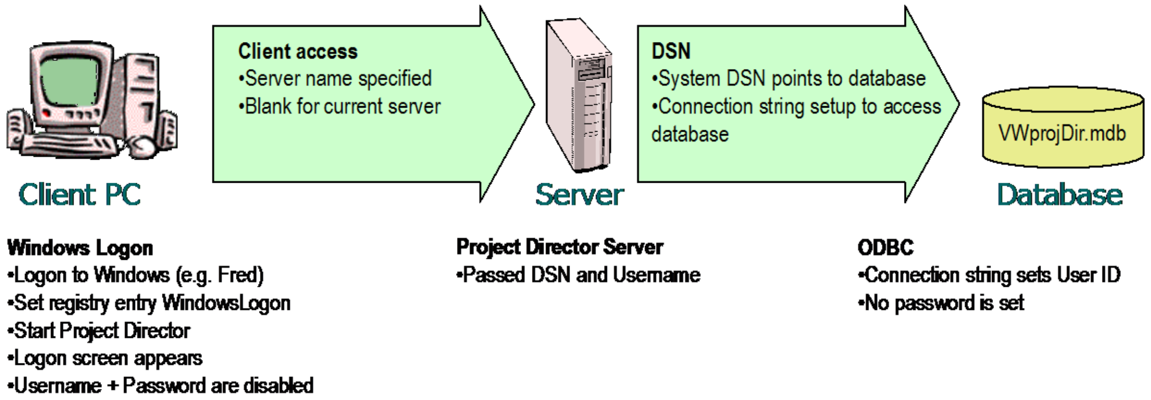
To add a customised wizard to the details screen, wizard menu, change one of the options in the database using VWadministrator. The entries are category “Wizard” and the items are “Custom1” to “Custom9”. The value of the entry should match the name of your wizard. The example below would show two entries on the drop down menu.

Item	Category	Value
Custom1	Wizard	KPI update
Custom2	Wizard	My own fields
Custom3	Wizard	
Custom4	Wizard	
Custom5	Wizard	
Custom6	Wizard	
Custom7	Wizard	
Custom8	Wizard	
Custom9	Wizard	

Note: it is much easier to copy an existing wizard and modify it than to create one from scratch.

Windows logon

The purpose of the Windows Logon option is to use the authentication of Windows so users do not have to retype usernames. Setting the local users registry can enable this feature.



Logon screen

The logon screen will look for a setting in the users registry of WindowsLogon. If set to 1, the username and password fields will be disabled. The default value will be 0. The username will be filled in with the Windows logon name.

```
HKEY_CURRENT_USER
Software
VB and VBA Program Settings
VWProjDir
Logon
WindowsLogon
```

Alternate Database

You can override the default (shipped) MS-Access database by setting up your own ODBC connection. This involves two steps:

1. Converting the database
2. Setting up the DSN
3. Changing the connection string

Converting the database

The database is very simple with no MS-Access features used. Only tables and queries need to be converted.

Setting up the DSN

Set up the DSN to you database specifications.

Connection string

The ADO connection string can be overridden using a registry setting. The setting is:

```
HKEY_CURRENT_USER
Software
VB and VBA Program Settings
VWProjDir
Database
ADOconnect
```

It should be changed in both VWProjDir and VWLogonDB folders.

The string will be converted to substitute the DSN and username by changing:
<DSN> to the DSN passed (e.g. ISDEVSQL)
<Username> to the username passed (e.g. Fred)

For example, the following connection string:

`Provider=SQLOLEDB.1; Persist Security Info=False;User ID=`**`<username>`**`; Password=; Initial Catalog=ProjectDirectorTest; Data Source= `**`<DSN>`**`; Use Procedure for Prepare=1;Auto Translate=True;Packet Size=4096;Use Encryption for Data=False;Tag with column collation when possible=False`

Will be converted to:

`Provider=SQLOLEDB.1; Persist Security Info=False;User ID=`**`Fred`**`; Password=; Initial Catalog=ProjectDirectorTest; Data Source=`**`ISDEVSQL`**`; Use Procedure for Prepare=1;Auto Translate=True;Packet Size=4096;Use Encryption for Data=False;Tag with column collation when possible=False`

When the user logs onto DSN=ISDEVSQL with a username of Fred.

Other comments

The username will still need to be maintained in the Project Director database. This will allow you to reject non-authorised users and grant project privileges to users.

Set all passwords in the Project Director database to 0 (no password).

Ensure at least one of the usernames has administrator access to Project Director.

If users can change their registry settings it is possible for them to logon as another user.