Overview of the WebDirector 's WebProject Edition

The WebDirector © Enterprise enables users to track, manage and report on projects from the early planning stages through completion. Project management is simplified through unique features, including a real-time graphical interface to the entire portfolio of projects, easy customization to fit an enterprise's existing methodologies, and sophisticated prioritization and management of the complete project portfolio. The software also integrates with Microsoft Project, is delivered with applicable custom tailoring system , and provides unique monthly metrics that measure the strengths and weaknesses of the organization's overall project execution.

WebDirector 's Capability Maturity Models (CMMs) assist organizations in maturing their people, process, and technology assets to improve long-term business performance. WebDirector has developed CMMs and Integrated Product Development based on the SEI's CMM Integration (CMMI). WebDirector 's Software Project Management system based on Institute of Electrical and Electronic Engineers, Standard for Software Project Management Plans, (IEEE Standard 1058.1-1987)

Our motto at WebDirector is: "Simple, Sensible, and Supportable web-based project management". All of our tools are designed to be low cost, completely customizable, and are delivered (on your servers or ours) with all the applicable source code. You will find that we can implement solutions tailored to your project management needs at a fraction of the time and cost of rigid, expensive, and complex software solutions.

Adopting the WebDirector© will allow your company to:

- Personalize project management for each end user
- Manage projects based on your company's project lifecycle
- Prioritize and evaluate projects based on multiple criteria
- Integrate with Microsoft Project
- Increase management productivity

Project Management – Modules

Risk Management	Issue Management	Skills Management
Resource Management	Scope Management	Change Management
Document Management	Project Prioritization	Deliverable/Task Management
Project Process Map	Time Entry & Reporting	Project Feedback
Service Requests	Action Logs	Support Logs
Project Financials	Deliverable Financials	Status Reporting
Microsoft® Project Integration	Dependencies	Satisfaction Assessments
Project Metrics	Project Milestones	Auto-Generated Resume
My Home Page	Project Routing	Project Entry
Templates	Downloading	Project Filters
Project Phases	Deliverable Phases	Print-Ready Reports
Assignment to Program Work	Forecasting	Labor Cost Tracking
Online Glossary		

Program Management – Modules

Risk Management	Issue Management	Change Management
Program Milestones	Program Feedback	Status Reporting

Action Logs	Program Metrics	Print-Ready Reports
Work Totals	Program Total Financials	Downloading
Online Glossary	Document Management	

Portfolio Management – Modules

Organization Workflow	Portfolio Metrics	Portfolio Level Reports
Templates	Security Model	Financial Reporting
Prioritization	Alignment with Corporate	Strategies
Time Reporting		

Support for Multiple Companies/Departments:

In the past when a company had multiple holding companies or departments that wanted to use an enterprise solution there was a co-mingling of data when logging in and using the application. This detracted from the usability of the system as people, processes, and reports had to be manually filtered of data to be effective.

For most companies who wanted to separate out the PM software into distinct departments or companies the options were:

1. Users would have to constantly filter the data to show only the names / departments they were interested in
2. Businesses would have to pay twice for the software
3. Clients would have to submit projects and keep track of multiple sites
4. IT support groups would have to provide twice the overhead and support
5. Programmers would have to write custom reports and integration tools would have to be written and maintained

With the WebDirector Enterprise Edition companies can now have a single data repository for information yet maintain the appearance of having an unlimited number of company, department, or client-specific sites. For each company a user sets up within the WebDirector , users will be greeted with their own organization charts, project portfolios, templates, users, and best practices. Best of all, there is an administrative company account such that one of the company logins can see the combined portfolio for the enterprise.

This enhanced WebDirector solution is ideal for:

- Enterprise companies who wish to have different department PM solutions without having to actually deploy different tools or instances of the software
- Professional services firms who would like to separately maintain every client in their own company site while simultaneously allowing the rollup of all client project work for management
- Project management and consulting companies looking to host an online application to compliment their existing practices
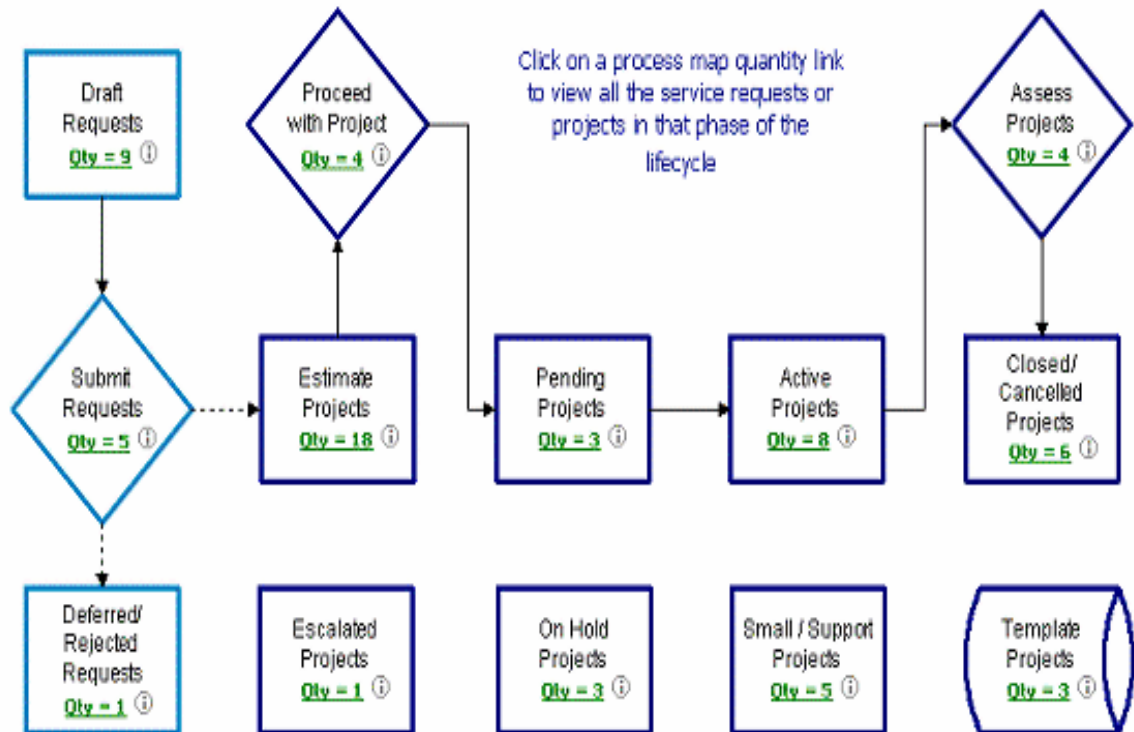
Enterprise Project Prioritization:

Aligning resources with the highest priority projects remains a daunting challenge at many companies. Managers need to understand the highest level priorities of the company while still having the flexibility to set priorities at their own level of the company. Furthermore, a consistent "business value assessment" needs to be assigned to each project as a tool to determine those projects that have the highest possibility to increase revenue or reduce costs at an acceptable risk level.

This premise of substantiated, any-time, any-level prioritization is the realization of the new prioritization system in the WebDirector .

Project Lifecycle
Most projects go through a lifecycle from inception to close. To help visualize this process, the WebDirector $^{©}$ utilizes a process map that shows where different projects are located in this lifecycle. This map can be completely customized to diagram the lifecycle of a company's projects. Projects in each step can be accessed by simply clicking on the quantity link inside each box. This simple diagram has received high praise from our clients who can now visualize the lifecycle of their projects and set rules for routing projects. Powerful yet simple to use, this map is the architecture of the project management component of the WebDirector $^{©}$.

Draft Requests
Qty = 9

Proceed with Project
Qty = 4

Click on a process map quantity link to view all the service requests or projects in that phase of the lifecycle

Assess Projects
Qty = 4

Submit Requests
Qty = 5

Estimate Projects
Qty = 18

Pending Projects
Qty = 3

Active Projects
Qty = 8

Closed/ Cancelled Projects
Qty = 6

Deferred/ Rejected Requests
Qty = 1

Escalated Projects
Qty = 1

On Hold Projects
Qty = 3

Small / Support Projects
Qty = 5

Template Projects
Qty = 3

Location Hierarchy:

As globalization continues, so does the need to effectively track projects, tasks, issues, and other key project management attributes back to a geographic location and have that information roll up regionally, nationally, and internationally. The WebDirector capitalizes on the same interactive and hierarchical technology that makes our "Organization Management" so effective to enhance location reporting.

Now users can set up locations by continent, then by country, by state/region, by city, by town, and finally by building. Projects can be assigned to a primary location and every task, deliverable, issue, risk, and change can further carry its own location.

The WebDirector then automatically produces an interactive report that allows users to drill down through location information.

Personalized Project Management

The WebDirector © provides team members with quick and easy access to all project information relevant to them. My Home Page displays project information specific to the person logged on. Rather than spending time sorting through all projects, you can instantly access information for your own projects and assignments. In addition, individual timesheets are pre-populated with only those tasks, deliverables, issues, and risks to which you are assigned.

Portfolio Management The WebDirector $^{©}$ comes with industry standard metrics defined in either traditional or graphical reports. The dynamic graphical charts allow executives to see how the company is managing its projects, how much time is spent on low-value projects, and how clients view the products and services you are providing. Additionally, the WebDirector $^{©}$ allows you to create ad-hoc reports which can be printed or downloaded into Excel spreadsheets.

Increase Management Productivity

The typical organization uses what we call the Funnel Technique to provide information to executives. Project managers receive information from the project team in many different formats and then provide the executives a fraction of the information in a PowerPoint presentation. The WebDirector © turns the funnel upside down and with minimal input from the team members and project managers, the executives receive a wealth of information and metrics.

Microsoft® Project Integration

For many companies, Microsoft® Project is an important component of project management. Even with the adoption of an enterprise level solution that can address project, program, portfolio, and performance management, many companies will continue to define a role for Microsoft® Project. To help these companies successfully adopt an enterprise-level solution into their business and project management

culture, the WebDirector © has an intuitive and industry-leading level of integration with Microsoft® Project.

The WebDirector © acts as a central repository for resource information throughout the company. Team members and roles can be identified for the project in the WebDirector © and then exported to Microsoft® Project. They can then be assigned to tasks with the click of one button integrated into the Microsoft® Project toolbar. This will automatically import all team members and roles identified to date. Any time new team members or roles are added to or deleted from the project, the resources can be updated in the project plan.

The WebDirector © also has a section for deliverable and task management that is linked directly with your Microsoft® Project project plan. Just open the Microsoft® Project project plan created by the WebDirector ©, and begin creating deliverables and tasks, assigning resources, and estimating work. When you are ready to import the tasks into the WebDirector ©, simply click the update button in the Microsoft® Project toolbar. Once tasks are in the WebDirector © database, all team members assigned to the tasks can begin entering time against them. To delete a deliverable or task from the project plan, simply delete it in Microsoft® Project and click on the Task button to update the WebDirector ©.

The WebDirector © is a powerful time management application that allows you to track time for deliverables, issues, risks, and now Microsoft® Project tasks. Users of the WebDirector © will track their time against all open tasks to which they have been assigned. To update actuals in Microsoft® Project , simply open the project plan and click on the new Actuals button in the tool bar at the top of the screen. This will initiate a query in the WebDirector © database for all tasks in the Microsoft® Project project plan to which time has been assigned. The query will return the actual time submitted by all team members for each task and report the time for each team member in the Microsoft® Project project plan.

Along with the new functionality described above, the WebDirector © will continue to produce project summary statistics for your project plan. The WebDirector © database will pull in all task information and summarize it in a report that looks like the report Microsoft® Project creates when you select Project/Project Information/Statistics from the menu bar.

The relationship between the WebDirector © and Microsoft® Project , which allows for the flow of information between the two applications, is more easily understood by viewing the relationship in a diagram. Understanding the process of using Microsoft® Project with the WebDirector © makes it more clear how seamlessly the two applications are integrated and how information is exchanged.

WebDirector – FAQ:➜

We have an existing methodology that we would like to incorporate into a webbased application. Is this possible with the WebDirector ?

We developed the WebDirector © as a tool that is almost completely customizable. Every one of our clients has customized our application to some extent. Whether they make minor field adjustments, or ask for integration with other applications, customized process flow maps, or even functionality we haven't developed yet, we have successfully delivered. In fact, most return to us periodically to update and perform additional customizations to keep up with their growing sophistication in portfolio management.

The WebDirector © models a process methodology, or lifecycle of a project using our process workflow diagram, which is found on the Projects tab in our application. It follows a project from the proposal stage all the way to closed, with multiple stages of evaluation, including building estimates, client/external approval, active, and satisfaction assessment. Of course the process map is completely customizable as well.
Rather than develop an application that espouses a methodology to portfolio management, we developed a tool that allows us to develop an application that can accommodate other methodologies. Our clients often have a well-defined methodology to project and program management. A solution that requires them to abandon that methodology is not going to be successful. They need a tool that can present their methodology in a web-based environment. Furthermore, the tool needs to be SENSIBLE in its design, SIMPLE to use, and SUPPORTABLE to end users and administrators within the company.

What makes WebDirector unique from the competition?

Any good enterprise solution to portfolio management is going to address the typical components of project management, i.e., risks, issues, milestones, resources, change requests, etc. What makes the WebDirector © unique can be broken down into four categories:

- Doing business with Interbase
- The Customized Solution
- Unique Features
- Pricing/Deliverables

The Customized Solution

The WebDirector © is a 'no compromise' solution that integrates your existing methodology plus all of the best practices you have been reading about but not yet implemented. Most software solutions are selling you a methodology that has been integrated into the software. Customizations are usually limited and ultimately the end user must adopt new practices. As a result, these solutions are not always view favorably by end-users. We do not limit our application to one methodology. We believe this is one of the main reasons for our 100% success rate. The WebDirector © can be completely customized. A tool which is the manifestation of your organization's methodology to project management will have a much higher success rate and result in a ROI in the shortest possible time.

Describe the import, export, and linking capabilities of your product. What limitations can be encountered that could inhibit the performance of the product?

Import capabilities: We have several features that allow our customers to pre-populate and configure their systems. First, we have Excel configuration checklists that the client can fill out which become the configuration parameters of the system. Next, we have an Access "data loader" database so we can import existing organizational data. Once this Access database has been populated – we have several automated "macros" that will populate the WebDirector © Oracle® database right from the Access data tool. Finally, we can import data from any relational data source right into the WebDirector © database. Since the code and the database are open, we can and usually do integrate data from other project management and reporting data sources to allow our clients the level of integration they demand.

Export capabilities: The export capabilities of the WebDirector © are equally impressive. The WebDirector © allows users to build their own web-based reports by simply setting up the criteria they are looking for. users can run their own "what if" analysis, download the information, analyze the data, and email the information without any report writing or data experts. Furthermore, the Access data tool allows for quick export and backup capabilities of the system as well.

Can you describe the product's user environment?
The user environment is 100% web-based. There are no user requirements other than a Y2K compliant computer and web browser. Our simple web interface is the "Yahoo" of project management – allowing for simple operations and very little training to become proficient in managing, reporting, and tracking projects at any level.

Can you describe security features incorporated in your product?

The user is forced to log into the home page of the application to begin a session. Every page is encoded with a quick read to see if the user is active. If there is an inactive period or the user is trying to access any page of the application without logging in – the system will clear their session and redirect them to the home page to login. No sensitive information is stored in the cookies on the machine.

Application Security: There are (by default) 5 levels of application security built into the system. These levels can be individually granted read, update, add, and delete access to any page of the application – very simply and easily.

Level 1: Executive (Default: Initiate projects or programs, read data)
Level 2: Project Team Member (Default: Read data, Read/Edit sub-project information such as issues, changes, risks, milestones, etc.)
Level 3: Project Manager (Default: Read/Edit/Add issues, risks, milestones, etc)
Level 4: Program Manager / Super User (Default: Read/Write/Update/Delete records. No access to maintenance area or user accounts)

Administrator: Administrator (Default: Read/Write/Update/Delete records. Full access to maintenance area, create user accounts, reset passwords, and expire user accounts)

	Microsoft Office Project Server 2003	Realization Project Management	WebDirector
Delivery Options: dedicated hosting (with or without encryption), or	Local installation only	local installation	☑
100% Web-based / Thin Client / Native HTML	**No** Active X add-ins not compatible with non-Microsoft browsers	☑	☑
Fully Customizable: Change form layout, delete screens, add new functionality, full database access	**No**	No	☑ Include the user level and customer's methodology intergration.
Project Status Reporting and Health Indicators	☑	Yes	☑
Enterprise Templates	☑	Yes	☑
Ad hoc web-based reporting for all areas of project management	☑ But not intuitive - have to navigate to different areas of the tool	No	☑ Integrated in one central reporting area. Download professional reports to Word and Excel or view them in native HTML.
Issue Management	**No** Requires SharePoint Portal and custom configuration at $300/user + consulting time	No	☑ Includes text field collaboration, assigning multiple people, sign offs, time sheet tracking, and enterprise reporting
Risk Management	**No** Requires SharePoint Portal and custom configuration at $300/user + consulting time	Yes	☑ Includes text field collaboration, assigning multiple people, sign offs, time sheet tracking, and enterprise reporting
Service Requests: Customers can create service requests/ideas that can be grouped into projects	**No**	No	☑
Bug/Support Tracking	**No**	No	☑
Dashboards/Project Management Office Reporting	☑	No	☑
Change Management	**No**	Yes	☑
Action Items	**No**	Yes	☑
Feedback: Track and organize client feedback on projects	**No**	Yes	☑
Document Attachments	**No** Requires SharePoint Portal and custom configuration at $300/user + consulting	No	☑

Feature			
Lifecycle/Project Workflow Management: Interactive process map based on customer methodology	**No**	No	☑ It will allow to add the ISO9001 processor workflow or customer's own workflow
Resource Management/ Forecasting	☑	Yes	☑
Time and Status Reporting	☑ Only tracks time spent on tasks. No accounting for the hours spent on issues, changes, risks, action items, or support.	Yes	☑ Tracks time on ALL aspects of project management for a full accounting of where people are spending time
Integration with Microsoft Project Professional	☑ Yes - but requires users to open the Microsoft Project client and schedule everything down to the task level.	No	☑ offers a simple scheduling feature for small projects or people that don't have time to spend maintaining a task based plan in MS Project.
Skill Tracking	☑	No	☑ includes a pre-built database of skills and lets users track competency levels, years experience, etc.
Role Tracking	☑	Yes	☑ allows users to search for resources by role or skill
Business Value Assessment with Balanced Scorecard	**No**	Yes	☑
Post Project Assessment and Scoring	**No**	No	☑
Multi-organizational Process Tracking and Prioritization	**No**	No	☑
Program Management: Combine multiple projects as a program with separate program level status and management (issues, changes, risks, milestones, feedback, etc.)	**No**	No	☑
Email Notification	☑	No	☑
Computer-Based Training: Customizable Flash demos and tutorials	**No**	No	☑

WebDirector is focused on providing custom solutions to the challenges companies are facing within their PMO and throughout the project and program management culture of their company. We have had the opportunity to help companies better understand their current processes and methodologies, the strengths and weaknesses in their current PM initiatives, and their underlying needs which are generating the requirements for a new solution.