

SILVER REPORT

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Product: i-method

This report covers the Silver Stage assessment of i-method, an application from Interactive Methodologies Ltd., that I conducted between the 7th and 10th June 2005.

i-method is a product-based project management tool that has been designed to apply the PRINCE2 methodology, automate as much of the routine work as possible, and provide templates to assist with document creation whenever practical. It makes available such facilities as a central data repository, automatic configuration management and the ability to edit and customise the standard templates to incorporate an organisation's best practice. In essence, it's built as an HTML web site of twelve hundred or so pages that resides on the client's Web server and is linked to a database, which could be Access, SQL Server or MySQL. To run the application, Microsoft Internet Explorer 5.0 or greater is required. It's also available as an ASP service and can be converted into an executable file to enable it to run on an ordinary network.

The basic set-up of the system requires the entry of information about the organisation, including the names of individuals, departments and cost centres. It is not difficult and i-method's extensive on-line help system is available should it be needed.

The user's home page opens to display, on the right-hand side of the screen, a personal daily log showing the tasks that the individual user is scheduled to perform. To the left is a list that illustrates the status and progress of current projects. Highlight a project and a semi-graphical list, detailing the current status of that project's PRINCE2 products is displayed. The amount of information shown, and the functionality available to each user is dependant upon their security level, which is controlled by the System Administrator and is role-based. Links enable the progress of a project to be viewed on a Gantt chart. However, i-method isn't a scheduling and resourcing tool and, if the user needs these functions, a third-party application would be required.

When creating a new project, the user enters some basic project information, including its name and description and some date and cost data. The Initiation Stage of the project is then defined automatically and some standard tasks are created in a daily task log. The project is automatically created

and the required PRINCE2 products are listed.

The user then defines the project organisation and people are assigned to standard roles using drop-down lists containing the names of the people available (which were entered into the system when it was set up). Whenever drop-down lists are used, intelligent searches are performed. When someone is assigned to a role, they receive advice that they have been so assigned and are required to accept or refuse the assignment. The 'Project Organisation' chart shows, in diagrammatic form, how the organisation has been defined at the current time and can be amended as necessary.

The user is able to manually enter details of the project's non-management products using a module provided for that purpose. New specialist products are defined by adding them to the product flow diagram and entering some information about each, including a description, a duration and any dependencies. The new products are then allocated to stages. Whenever a new stage is created, the system automatically appends the appropriate management products to the stage. An auto-schedule function is then used to display these new products on the project Gantt chart. It isn't possible to export a plan from i-method and so, if a third-party planning and scheduling application is used, all data will have to be re-keyed.

When producing the PRINCE2 products, you are firstly shown a page that explains what the product is, what it's used for, some version information and some advice on its completion. Drop-down lists are used to assign reviewers and approvers and, wherever practical, standard text is suggested for each section of the document. Each section of text is contained in its own content editing box providing a selection of word-processing tools. Wherever possible, each section of each document is tackled in the same way, and this consistency of approach enables one to fairly quickly become familiar with the product. As you work through the project, text entered into documents that have already been produced is automatically re-used wherever appropriate. This is particularly noticeable when producing the Project Initiation Document (PID) which, provided all previous products have been properly produced, is virtually complete when it's opened for the first time, needing, at most only minor editing.

The document flow system is fully integrated. Whilst working on a draft document, the author is the only person able to access it. However, when completed and ready, all documents are automatically sent for review and approval to the previously assigned people. A 'Feedback' facility is used by reviewers and approvers to pass information and comments back to

the person that prepared a document.

The system contains risk, issues, quality and lessons learned logs. The risk log is searchable by keyword and issues can be imported into the risk logs as the foundation of new risks.

The system contains a good selection of information screens and reports. The Stage Plan, for example, is created automatically when products are assigned to stages. It illustrates the product breakdown structure and product flow diagram, taking into account the dependency details collected when product details were entered. PRINCE2 product dependencies are automatically entered.

Work packages may be added to particular stages and progress against the work contained in a package may be entered and updated. The updateable information includes the percentage complete, spend to date and remaining spend as well as start and completion dates. The new data is shown on the Stage and the Project plans and Checkpoint and Highlight reports may be produced.

Changes to plans already approved can only be made by producing an Exception Plan and an Exception report may be produced to explain why such a plan has become necessary.

When a stage is defined as the final stage in a project, the system automatically appends the appropriate PRINCE2 closure documentation to the end of that stage.

I have already established, during the course of preparing the Bronze Assessment report on this product, that its design and use falls within the field of guidance offered by the OGC Business Change Guidance documents covering Project Management, Programme Management, Portfolio Management and Risk Management. I now confirm that opinion and can confidently state that by using the i-method system in the way that it has been designed to operate, will assist compliance with the appropriate guidelines. Interactive Methodologies has taken considerable pains to ensure that their product is fully PRINCE2 compliant. Following my assessment of the product I have no qualms about endorsing their success in achieving this objective. I am convinced that using i-method would encourage and facilitate PRINCE2 compliance at every stage.

The printed publicity material submitted with this application consisted of a copy of the 'Product Factsheet' and a CD sleeve.

I have studied each of these documents. On the Product factsheet I found the statement 'PRINCE2 Project Management has never been easier.' Because of the all-encompassing and generalised nature of this statement, I was unable to substantiate it. However, I am of the opinion that this is essentially advertising 'puff' and, as such, is unlikely to mislead any potential purchaser of the product. I did not find any other

claims or statements that could be construed as misleading and consider that these documents fairly represent the capabilities of the products.

I also carefully studied the Interactive Methodologies Web site at www.i-methods.co.uk - a copy of which was provided to me on CD. I found no statements there that I was not able to substantiate.

Consequently, I recommend that i-method be given the Silver Award and suggest that this assessment should now proceed to the Gold Stage. I suggest that Interactive Methodologies be invited to supply details of two clients who have been using this application during the course of their business for a sufficient period to become well versed in the way it works. My intention is to interview the people who use this software and discover whether they are of the opinion that it works as it should.

S. Cotterell, Assessor
10 June 2005

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