@task Enterprise

Steve Cotterell travelled a long way to review this application. Was the software worth the effort?

A slick, Web-based project management application that provides scheduling, resource and cost management facilities for distributed organisations in a fast, good-looking package.

I first saw @task when I was preparing my 'Quicklooks' piece for *Project Manager Today's* July issue. My initial reaction was 'This product looks so good that I must review it properly'. There was just one snag to that plan. AtTask Inc. occupies one of the old WordPerfect buildings that nuzzle beneath the Wasatch Mountains on the western side of the Rockies, near Salt Lake City. However, these little difficulties are merely sent to try us, which is why, on this hot July afternoon (it's in the 90s outside), I'm sitting in Provo, Utah typing these opening words to my review of this application.

Refreshing start

@task can be run on your own server or hosted by AtTask. It's platform independent, installing on Windows, Unix and Mac PCs. It's also browser independent and runs under IE6 and later, Firefox, Safari and others. @task uses Ajax technology allowing small areas of the screen to be refreshed when required (rather than the whole screen) considerably speeding up the application.

The first time you log in you see the Welcome screen (which can be hidden thereafter) with four tabs, Welcome, Navigation, My Projects and My Tasks. To the left is a navigation panel that is visible on every screen in the application. In the main screen area are two large buttons leading to Flash tutorials – 'Project management basics' and a 'Product overview'. Another button leads to the Online Support Centre and there's also a panel that gives you access to a list of Hints and Tips.

A '?' help icon appears in the top left-hand corner of every screen and this, too, leads to the Online Support Centre. Here may be found a comprehensive set of downloadable manuals as well as an extensive list of Flash tutorials covering some of the application's more complex tasks. There's also a group of public support forums which can be searched for information and in which you can raise issues. AtTask moderates these forums and their support staff answer the questions posed.

At present AtTask has no UK representation, which means that all support comes from their Offices in Utah, with its seven-hour time difference.

At the top of the screen are four drop-down navigation menus – 'My. . .', 'Find', 'Create' and 'Recent'. One of the many things you can set up using the 'Create' drop-down, are new users. You use a 'New User' form with a few required fields and several optional fields to hold additional information. You can also import lists of users from Excel or comma-separated files.

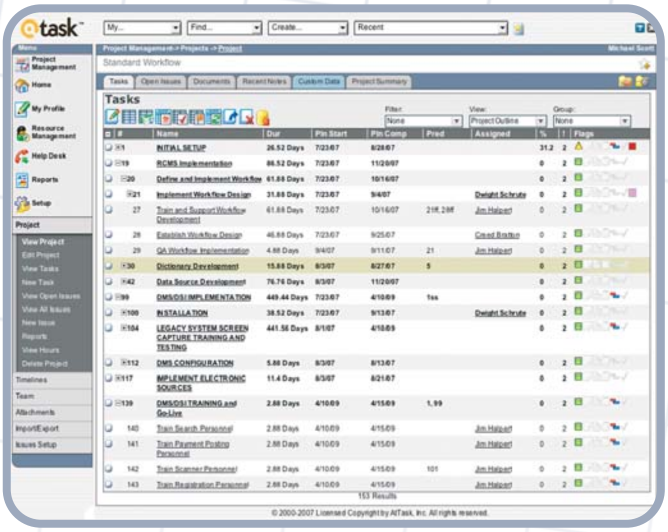
	Users on Task	Cost of Task	Time per User	Time of Task	
Calculated Work 	↑	↑	–	–	As the number of users increases, so does the cost of the task. The time to complete the task remains the same.
 Calculated Assignment	↑	–	↓	–	As the number of users increases, the time each user works on that task decreases. The Time and Cost of the task is unaffected.
Effort Driven 	↑	–	–	↓	As the number of users increases, the time to complete the task decreases. The Cost is unaffected.

The way resource hours and costs are calculated by the system depends on a task's duration type.

Having created a new user, you specify their home screen and which reports and functions are made available to them. You can place them into Work Groups used to identify, say, geographic or functional divisions within the company and assign multiple 'Job Roles' defining their skill set and which are used when searching for people with particular skill sets. You can set up, edit and delete job roles. The users' cost and billing rates per hour can be set at this time as can their access levels which control their system rights. The package comes with eight predefined security levels and you can create, edit and delete levels.

An Organisation Chart is available, allowing you to position someone in the organisational structure, controlling their supervision hierarchy, escalation levels and so on.

You can create custom fields for use in many areas to contain information that isn't catered



There's a lot of information contained in the Tasks list.

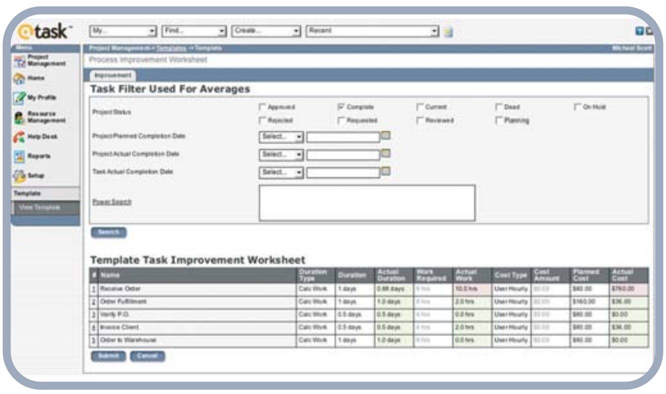
for by the standard system.
The language used by the application is set within the browser's Preferences area. It's available in English (US), Spanish, French, German, Japanese, Chinese (traditional and simplified). Other translations could be provided. Date and time formats follow the selected language option and currency symbols can be set.

Get going

The start of a project usually begins with a 'User Utilization Search'. Using this system, you check what your resources are doing before setting up the project so that you can assign them as you go, although you can set the project up and do the assignments later.
You set the date range for the project and search for specific people, groups or roles. You then see a list of names with details of their allocation during the specified period, both in hours and percentage available. This information is also available on the 'User Utilization Grid' which shows who's allocated to what, when.
You use the 'Create' drop-down menu again to create a new project, filling in the name and other basic project information on the form that appears. Project templates can be set up containing all of your standard data to save time when setting up repetitive projects.
A project can be set to 'Automatic Update' where, each night, the project dates are automatically re-calculated. 'On Change' updating means that the project is only updated when changes are made manually. The two methods can be combined so that changes are applied first and then the rest of the project is updated automatically. The system can also be set for manual updating.
Projects can be linked to groups of users (governing rights) and to clients for statistical purposes. Budget and fixed revenue and cost figures can be entered and you can set the system to record specified types of change in an audit trail –defaults can be established.
The project, as an entity, now exists as an empty shell and the next screen you see offers you the choice of entering tasks, team details and notes and of attaching documents and detailing a report schedule.
Having selected the 'Team' option, you can add people and roles to the project – or a mixture of both. You can search for people based on their job roles and access levels and select one (or more) from the list of matching people.
Tasks can be added via a 'Tasks' form. You enter each task's priority, duration, predecessor details and constraints and its 'Tracking Mode', this instructs the system as to how to handle the task's tracking. Resources can then be assigned from the team you previously selected.

A new predecessor

AtTask has created a fifth type of predecessor. There are the usual: finish-start, start-finish, start-start and finish-finish and they've now added a 'Scheduled Start' type. Although blindingly obvious (in retrospect) I haven't seen this anywhere else. Lags and inter-project dependencies can be set.
When detailing the task, you must specify whether its duration type is calculated work, calculated assignment or effort driven as the way the hours used by the resources and the costs are calculated by the system depends on this (see explanatory diagram).
The task's revenue and cost types can be detailed, controlling how these figures are calculated by the system.
You can set approvers for the completed task. Should an approver reject a task then an issue is automatically raised with the original task owner as the issue owner. The issue, when completed, has to be re-submitted to all of the original approvers.
Alternative views of the task data can be selected, each showing a slightly different aspect of the information – progress, budget, and so on, or you can create your own. Any project screen can be set as the default that you see when you open a project – many people favour the 'Tasks' view, which lists all of the project's tasks with a set of flags against each task giving an indication of its status.
Once the tasks have been detailed, you can create summary tasks and insert them at the appropriate places in the task list, indenting their sub-tasks accordingly. Multiple levels of indentation are possible – limited only by practicality.
The 'Task Worksheet' is a faster way of entering and maintaining data. The tasks that you've already set up are listed in a spreadsheet-style table. New tasks can be quickly entered by typing their details straight into new rows in the table – including assignments. When entering dependency details, you can enter complicated instructions using a shorthand format, which, once learned, speeds the operation, considerably.
When you make changes to a task, a note can be sent to one or more people telling them what's going on – using in-system messages or email or both.
Once a project's been created, it can be saved as a template. If it's started, you can clear certain types of entry (assignments, progress, etc.) before saving it. Tasks can be selected for exclusion.
One outstanding feature of @task's template system is that, once you've run several projects created from the same template, a 'Process Improvement' option can calculate each task's duration and cost based on the averages to date. You can then edit your template accordingly. Once again, blindingly obvious and absolutely brilliant!
When creating a new project, @task can import a MS Project file (both



@task's Process Improvement Worksheet is a clever way of increasing the accuracy of your project templates.

Project 2003 and 2007 are supported). @task will also export to MS Project format. In the next release, export to XML format will also be available. When importing from MS Project, you can match MS Project resources against @task resources.

Gantt needs work

A basic project Gantt chart can be displayed. A project's Critical Path can be shown on the Gantt (and can also be displayed on the Tasks view). The Gantt can be printed to a PDF file but it isn't interactive and, although you can change the time scale and choose some data to display on the chart, there isn't much else you can do to customise it. There's nothing wrong with the Gantt as it is but, with the rest of the application being so technically advanced, and with the technology for much more interactive and customisable Web-based Gantts available, I was surprised that it was so basic and hope to see development in this area soon.

Once the project's running, users are most likely to go straight to the 'My Tasks' list to see those to which they've been assigned. This screen is customisable by the System Administrator. By default, it shows overdue tasks and those due before the end of the next week, 'My Issues' and 'My Approvals'.

To enter progress information, you click a task's name and see a screen showing all of the task information. Clicking an 'Update Task Status' tab lets you enter percentage complete, actual start and end dates, etc. and log hours done, by whom.

If this completes the task and approval is required, the approvers automatically get notification of the new work, which also appears in their 'My Approvals' lists. Where actuals exceed planned data then, on the Tasks screen, they're shown in red.

It's possible to update several tasks at once by control-clicking them and selecting a 'Completion Status Worksheet' icon, available on all task lists. The selected tasks then appear in a spreadsheet grid and you can edit the data cell by cell.

You can create as many baselines as necessary and compare the figures in both tabular and graphical format.

Milestone reporting is catered for. You set up a 'Milestone Path' by defining your set of milestones and then assign each milestone to an existing task, maybe a summary task which is complete once its sub-tasks have finished. A report can then be constructed showing a high-level overview of the project's progress.

Different types of project would have different milestone paths (probably embedded in the templates). If so, searching for all projects and displaying them in the 'Project Milestone' view produces a project list, grouped by type and detailing their milestone position.

New views can be created, and can be made available to other users.

You can build your own tabular and graphic reports.

You can choose both standard and user-defined fields and format how they'll be displayed. If you want to be able to link to an object by clicking on its name in the list, you create a link to it. Data can be grouped via a number of standard groups and new ones can be created. You can summarise numeric fields and display the totals on the group header bar. Up to three tiers of grouping can be used. Views can be displayed on-screen, printed from the browser and exported to Excel, PDF or tab delimited format.

Reporting

There are 43 standard reports in @task, including calendars, issue reports, timesheet reports and charts. You can create a new report in 'list' or 'aggregate' format. A list report takes existing views, filters, etc. and combines them into a single report. An aggregate report allows you to create new views and filters and combine them to produce a report to which you can add graphic content. You're given the choice of using different types of graphics to illustrate the data. Graphic reports use Flash technology and can be manipulated with considerable flexibility. You can click on a segment of a graphic to view the data behind it. During testing a system bug in the pie chart report prevented this happening. I understand that this bug's been resolved and the fix will be released long before this review is published.

A report can be added to your 'Personal Dashboard' as a new tab. Up to three reports can be held on each tab and you can add up to four tabs to your dashboard. The Personal Dashboard is the system of tabs that you see when you first log in. The first tab is the 'Welcome' tab. The System Administrator defines the next four tabs and then come the four that you can add.

The timesheet system can be configured to allow users to create their own, or Administrators can create them in bulk. Timesheets can include administrative time categories and currently assigned tasks. Details of time already entered against tasks when progressing them are shown and users must specify when this time was spent. When timesheets are submitted for approval, approvers are notified and can approve or reject them as a whole. Approvers can edit timesheets.

Documents can be attached to projects, tasks, users and issues. A copy of the document is automatically uploaded to the application server. Documents are covered by security and you can define who sees what. An icon against the object indicates that documents are attached to it, and can be clicked to open them. Documents can be previewed and checked out and back in. Version control is exercised and new version numbers are automatically allocated. When someone doesn't have the right to view a document, they can be added to a list of 'subscribers', which over-rides the security restriction.

Issues can be logged at project and at task level. An issue can be converted into a project or a task. If an issue incorporates custom data then that data is transferred when the issue's converted. There's no risk management system available, although some risk management functionality is planned in a future release.

@task's Easter Egg

To experience @tasks very own Easter Egg, from the Home page select the 'Navigation' tab. Then select 'Setup' - 'System Settings' - 'Diagnostics' - 'More Cowbell'. If you need to, use Wikipedia to look up the explanation of this very American joke.

The 'Task Calendar' shows when tasks are scheduled. Clicking a task on the calendar opens it. There are no diary facilities on the calendar though some users have created their own system. However, the system integrates with Outlook and @task tasks appear on the Outlook calendar.

Although I didn't get to see them, I'm assured that the next release of @task will include a resource pool feature and a capacity planner.

So, was @task worth the trip? It's not perfect and I'd like to see a better Gantt chart, a risk logging system and a UK-based support facility, but, if you're looking for a slick, Web-based project management application then this one certainly belongs on your shortlist.

Right to reply

Thank you for the opportunity to reply. We have only a couple of comments: @task is committed to growth and support for our customers in the UK. We are working aggressively to establish a local Partner network to provide local support. In fact, we are presently hiring a UK-based sales and operations manager to further support the local UK partners.

New items with @task (ie, by the time this article is printed) include project and capacity planning, integration tools, and more. Project and capacity planning features allow you to manage how your projects line up with the capacity of your personnel. You can quickly see which projects you can do, which projects make the most sense to do, and how taking on a new project will affect your current plan. Integration tools not only include integration with MS Outlook, but Salesforce.com and QuickBooks, with more to come. Developers can even use our Software Developer's Kit (SDK) to build their own integrations via SOAP APIs.

Chad Jardine
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What does it cost?

@task is available in two configurations. The hosted version of @task Enterprise costs US$54 per user per month (minimum five users). It's also available as @task Professional, without some of the Enterprise features such as integration tools, enhanced resource management and capacity planning which costs US$33 per user per month (minimum five users).

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