Project Lifecycle Pro

Advanced Core Infrastructure

The difficult core foundational infrastructure has already been built so that you can customize Project Lifecyle Pro (PLP) easily using Salesforce's no-code functionality.

Advanced Access Controls

Advanced project management access controls are already built so you can focus on customization of project data and project management processes.

1) Project-specific access

Most project portfolio management (PPM) and project management tools use global access rights for a user. Meaning they have the same access rights to Project A and Project B. PLP uses project-specific access controls, meaning John Doe can have edit rights to Project A but only read rights to Project B.

2) Separate financial data access

You control separately whether someone can access the project data and the project's financial data. For example, you may not want an internal developer to see what you're paying external contractors. Or, you may have sensitive financial benefits, such as, staff reductions that you don't want all the team to access.

Again, this access control is project specific. John Doe project manager may have full edit access to his project's financial data, but only read access to non-financial data on other manager's projects.

3) Public versus confidential projects

At a click of a button, you can define a project as public or confidential. Everyone in the company has read access to a public project's non-financial data. Edit access and financial data access have to be granted at an individual level.

If a project is marked confidential, then only team members individually assigned to the project can even see the project. All others won't even know the project exists. This is important for sensitive projects like pending mergers or acquisitions.

Easy Reporting

Several key reporting infrastructure items have been built so you can focus on customizing reports.

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1) Easy task reporting

Tasks can be assigned to all of a project's child objects, like risks or benefits. An automation runs in the background that associates the parent project ID to these tasks. This ensures every task associated with the project contains the project ID. This makes it very easy for you create consolidated reports showing all the tasks on a project.

2) Self-filtering reports

There are specific project management reports built for project managers, sponsors and steering committee members. When one of these users opens the report it is automatically filtered for all the active projects to which the user is assigned. For example, Project Manager A will see a different list of projects when they open Report X than Project Manager B will see when they open Report X.

This seems minor but it is a big deal. If this functionality didn't exist then Project Manager A would have to copy standard Report X to create Report Y and then maintain a filter listing their specific projects. Project Manager B would have to do the same creating a custom Report Z. Now you have three reports to maintain rather than just one. Multiply this by hundreds of users and dozens of standard reports and you have one big support mess.

Automated Financial Roll Ups

When project financials are updated, the totals are automatically summed at the project, program and release level.

1) Cost and benefit sums

Both the project costs and benefits are summed to the project, program and release levels. The summation includes the budgeted values and actual values.

2) Manual override of roll ups

There are times when you may not want the total to be summed from the individual line items. This could occur early in the project when you have a high-level budget but haven't define all the individual costs. Checking a box turns the roll ups on or off. If you turn roll ups off, you can turn them back on with the click of a button.

Roll ups are controlled separately at the program, project and release level.

3) Include custom fields in roll ups

The roll up automations provided with PLP can be cloned and then modified to include your own custom fields. Perhaps you have a unique cost type that you want to track and sum. A Salesforce Admin can add this unique field to the cost object and then clone and modify the roll up automations to also include this new field.

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Override Standard Labor Estimates

You can control the generation of standard labor estimates. Standard labor estimates are generated when you define standard components and their complexity (easy, average, complex). The calculation of these standard labor estimates can be turned on/off at the click of a button. You can override the standard labor estimate for one component but use the standard labor estimate for another component.

Inter-Project Dependencies

Most project management tools do not handle inter-project dependencies. PLP handles dependencies so everyone understands critical milestones.

1) Automated generation of dependency records

When the project manager with a dependency creates a dependency record, a corresponding dependency record is automatically created on the supplying project. This allows the supplying project manager to have a single view of all the projects that depend upon them hitting their delivery dates.

2) Automated dependency alerts

When a project manager records a dependency against another project, the supplying project manager receives an alert of a new dependency. If the supplying project manager changes the status or date of a dependency, all the project managers relying on that delivery will receive an alert.

3) Restricted access

Only the dependent and supplying project managers have access to modify shared dependencies.

Change Management

PLP handles the complex many-to-many relationships required to track the organizational impacts of project releases. This facilitates the planning of training and communication required for releases.

1) Multiple-associations of change impacts

Organizational change impacts are associated with: components, systems, releases and projects.

2) Multiple stakeholders and change impacts

Stakeholders affected by the change (i.e. Accounting) can be impacted by multiple changes in a single release, and the change can impact multiple stakeholders. The data has been structured so it is easy to report on all the changes included in the release and who will be impacted so you can target training and communication.

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For example, a project manager can view all the change impacts and the impacted stakeholders in a single release. Also, a department manager can view all the upcoming change impacts to their specific department across all systems and releases.

Automated Project Approval Routings

When a project manager generates an approval request for a project, the request is automatically routed to everyone defined as a project sponsor or steering committee members. The project manager doesn't have to maintain a separate distribution list for every project.

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