

SmartSimple Database and Project Management Software

“As innovative as you are”

So you have a new program to manage! If you are like many program managers in government, you are going to be dealing with *projects* – discrete sets of activities, each of them contributing to your program, and usually run by someone who reports to you. He or she might live in government, but increasingly they live in the private or non-profit sectors or in other levels of government, municipalities or First Nations, for example. How do I manage them? “Aha,” you think. “I need a *project database* so I know what’s going on!”

So you talk to IT and explain your unique requirements. They build an applications model based on their view of the world and the applications come with their own unique data model. No vendor can quite match your work in reality so IT chooses the closest fit or suggests you pay for them to build one for you or modify someone else’s. You and your users are frustrated by the need to shape your work according to their view of the world, not yours, and energy is wasted managing disconnected components, models and perhaps even vendors. The vendors (or the IT folks) promise expensive solutions you didn’t budget for. You become distracted from your real aim in life and your executive becomes disenchanted with their IT investment.

Then your world changes. The Executive want a new component added to your database and you call in the vendors or programmers in again. The database never quite catches up to you or your program’s *real work*. You are in the middle of this when the program evaluators arrive. “Yes,” you say, “we have a project database and it identifies all our projects, but it doesn’t”.

Sound familiar?

But what if you could construct your database yourself exactly as you see your work, and you could expand or change its functions yourself any time you liked? What if it were on the web so all the stakeholders could access the parts of it you gave them permission to access? What if you could transfer all you old data into it easily, and the whole process were so inexpensive that you’d hardly notice it in your operating budget? And, best of all, what if you could do all this *with no programming and no IT investment*.

Can a database be built which that does all these things and can be changed as often as you like as your business changes? Yes, it can, *but only if you look first at the management needs and not the data*.

A small Toronto company, SmartSimple, has done exactly this. They recognised the functional commonalities of database management and looked at them from a completely different perspective, that of *management’s common needs*. This is a way you can generate your whole organisation’s “DNA” and manage it in one application.

SmartSimple found that all project work is basically similar and that all project databases have a huge number of common characteristics – except for the data inside them. For example:

- many events and activities need to be recorded and managed;
- many people need access and the access needs to be explicitly and expertly managed;
- one person is needed to run the show;
- work regimes and performance needs - and hence the data needs - keep changing;
- data needs (and access) are invariably hierarchical, but different people need different information at different times and for different reasons;
- access should be web based for convenient management, updating and access;
- whatever their responsibility, people in the program need to be connected;
- new needs need to be reflected in hours or days, not months; and so on.

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They designed a database methodology that incorporates the best features from the viewpoint of all the users, management and others. Then they designed the methodology to capture and import data used in the application from existing (or new) sources so that it can replace any existing database and they put the whole thing on the web so everyone who needs to can get at it. Over 400 organisations from the US Navy downwards are now using SmartSimple's database methodology.

SmartSimple's approach is independent of both context and content, operates independently of the data inside it, requires no programming or IT investment, can be operated, managed and changed by a single individual, and is inexpensive because you only pay when you use it. It is accessible through any web browser and sharable by any "permitted" (*i.e. by you as project manager*) individual or user group. Applications include project management, project tracking, performance measurement, program evaluation, member/employee records, case management and customer/client relationship management.

Using SmartSimple, a single "Certified Administrator" shapes *one application* to fit the needs of all the various people associated with the program or entity from the individual workers to the executive committee. This is done by *selecting* internal "themes", "relationships" and "permissions" with no need for programming whatever. Whatever, roles they play, all the users can then connect seamlessly to the data through the web and as roles change (as they always do) the system adapts quickly, easily and inexpensively to suit. Complex, expensive solutions are no longer needed; the Executive sees what it needs to see on reports and dashboards; energised program people see the "real world" of their own work; and energy is devoted to the core mission, not to the database. The key database metrics of the system are "hours and days" not "weeks and months".

What are these common management applications or "themes"? While new ones are being developed by SmartSimple users all the time, some of those available now are as follows. *They are all user selected "options" within the same operational database.*

Example Management Applications

Workflows and processes	How does this process work? Who is involved where?
Project and job tracking and management	Activity tracking - equipment, materials, resources, dates and deadlines, costs, etc
Job costing	Time tracking, time sheets, expense tracking
Organisation hierarchy/role definitions and management "permissions"	Organisational relationships. Who does what? Who can access what data?
Application, proposal and funding tracking	Track the progress and performance of funding applications
Reports and dashboards	Specific to each level in the hierarchy
Web forms	Editing, applications, maintenance, administration and tracking
Built in surveys	Performance evaluation and information collection
SmartFolders	File and document management
Referrals and contact management	Contact, relationship, "statusing" and referral management
Web page viewing	View pages from the database
Content management	Manage all the database content

Example User Communities' Interface

Communities of practice	Internal users such as employees; external users such as contractors, vendors and project managers
Discussion groups	Within the various communities of practice
Calendar management	Who is at that meeting? Where is someone today?
Email management	Filters and messaging templates; email broadcasting
Document library	Managed access to .pdfs

SmartSimple's revolutionary approach to database development and management truly reflects a new way of thinking about data and its management. Most importantly, because it requires no programming, you are never beholden to programmers or proprietary software. You merely pay a

