

Task Management/PM Software Comparison

By Mark Gerow and Kate Armstrong

This PDF is a comparison of a collection of tools available for task and project management. The opinions expressed below are solely of the two authors. We hope you find this informative and useful!

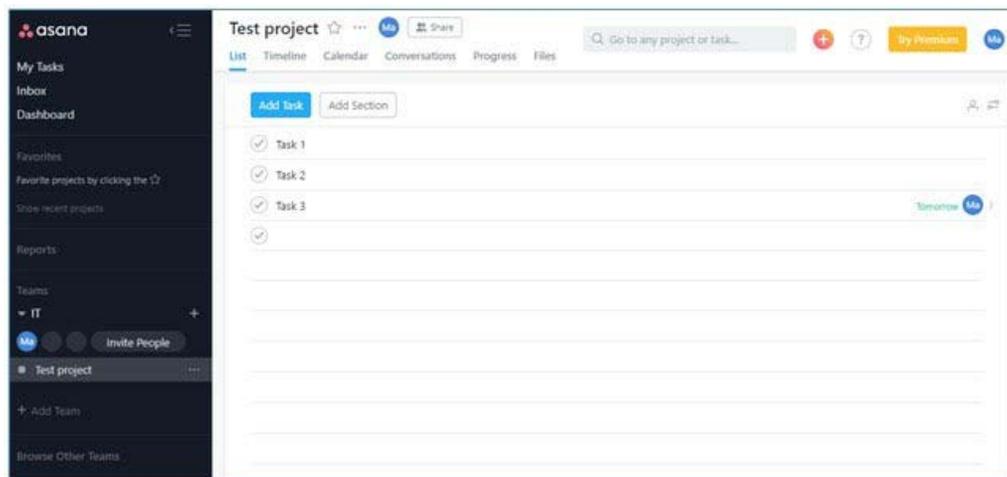
Tools Covered:

- Asana
- Excel
- Projects Online
- RealTime Board
- SharePoint
- Smartsheet
- Teams + Planner
- Trello

ASANA

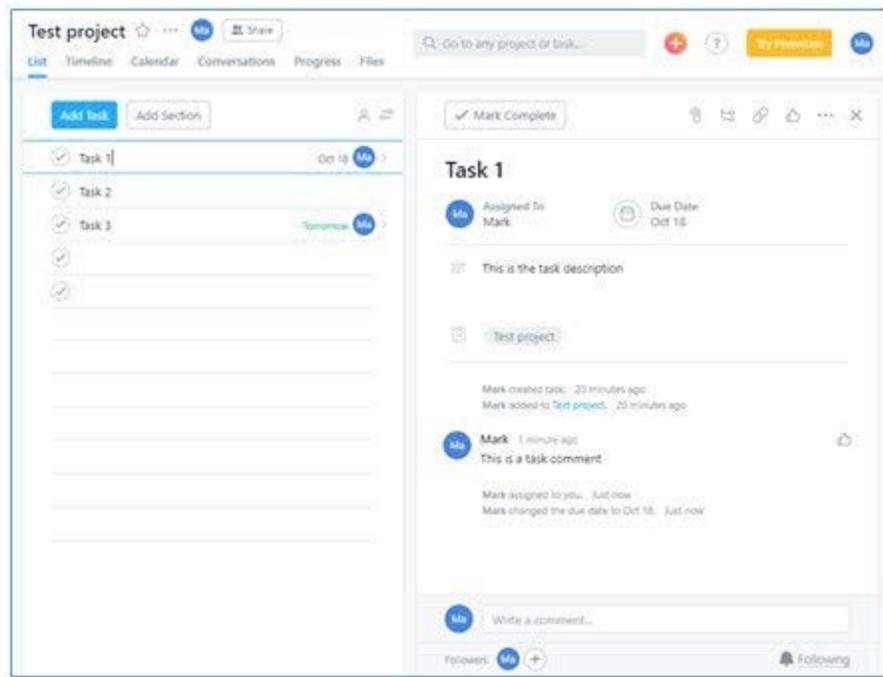
General Interface Design

In this review I looked at the free version of Asana. The paid version offers more features that I did not test. Overall, the UI is very simple and intuitive. Everything centers on simple task lists:



General Usability

Clicking on a single task brings up a form that allows you to add a description, assign the task, set a due date, and add comments. You can also duplicate tasks.



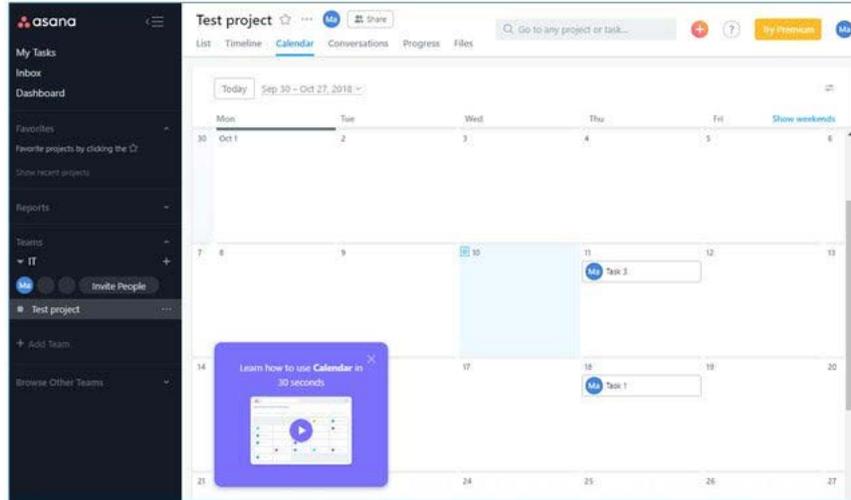
Unlike some other tools reviewed, Asana does not allow you to add custom fields to tasks or projects.

Use of Common Terminology

No jargon used here. Asana keeps it very simple: project, task, Due date, Comment, etc.

Visualization Capabilities

The basic version comes with three views: List (shown above), Calendar, and Conversations. A timeline and progress view is available in the paid versions. You can also see all files uploaded for a project.



It's pretty clear that the free version is intentionally limited, and offers to upgrade to “premium” popup regularly.

Flexibility with Customizations

There does not appear to be much customization that can be done in Asana. With Asana you create projects, add members, add tasks with basic tracking data, and your done. In this respect I would place Asana somewhere between Microsoft Planner and Smartsheets – more powerful than the former, but not as flexible as the latter.

Initial Set Up Timeframe

Very fast. Create an account, add a project, and begin adding tasks. You can be up and running in less than a minute.

Available Support/Training

Asana provides a nice library of training videos as well as online customer support.

Cost / Versions Available

The Lite version is free, Premium costs \$9.99 per user per month billed annually, and there is an Enterprise version (pricing not stated on website).

Application Integration

Asana has a large library of integrations available for products like Salesforce, Box, Office 365, Gmail, etc.

Email Integration

Integrates with Outlook, Gmail. Also integrates with email equivalents such as Slack and Microsoft Teams.

Challenges with Updating/Maintaining

None significant.

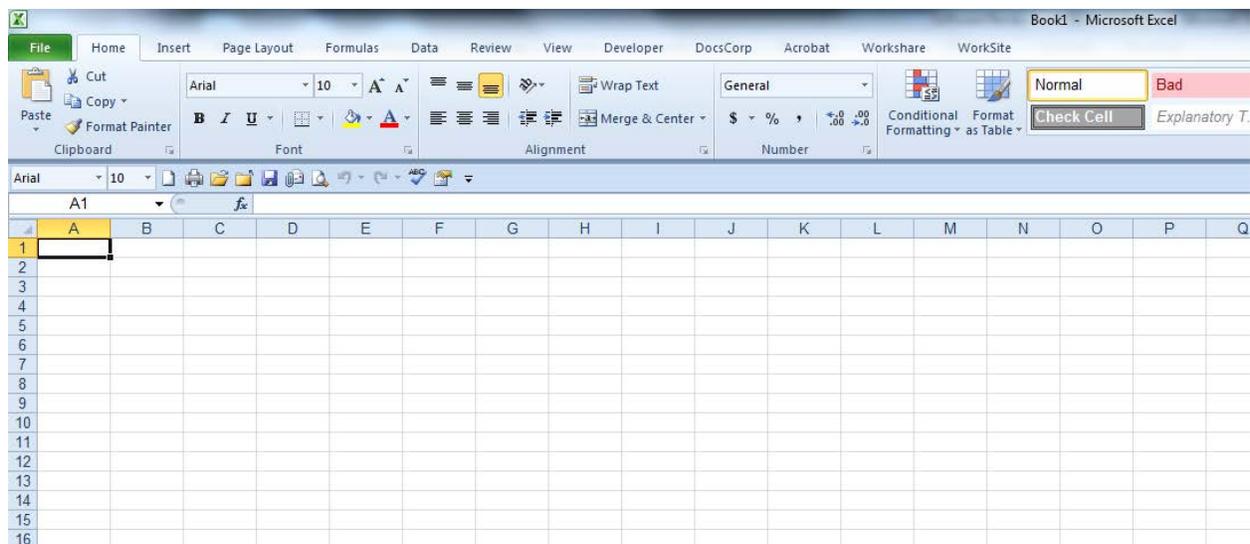
Mobile Support

A mobile client is available for free download which provides a basic UI, including both list and calendar views, for adding or updating tasks:

EXCEL

General Interface Design

Excel is something that is ubiquitous in most legal technology environments and is certainly commonly used for managing project. Excel is a spreadsheet application at heart so its interface consists of rows and columns.



General Usability

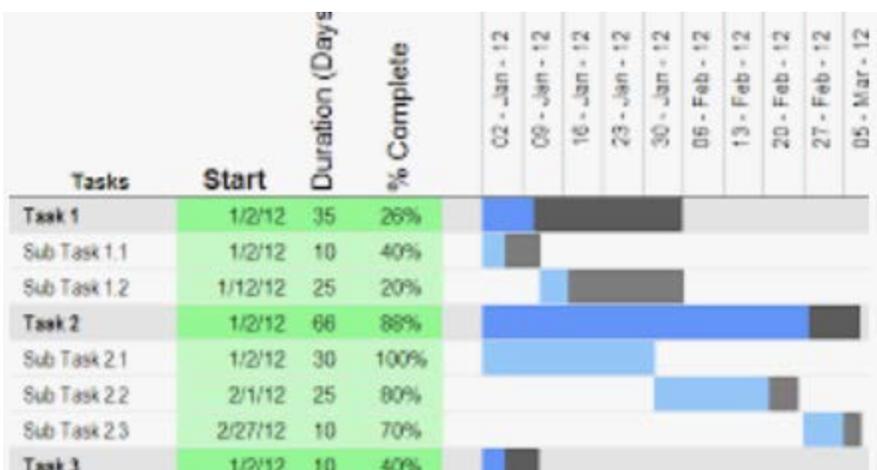
Excel is easy and intuitive to use but as a spreadsheet application it's not designed to manage projects. If you have a simple work breakdown structure or list of tasks, Excel could be used to manage but it fails in having the ability to collaborate with others. Things that are easily dealt with in other project management software (like predecessor tasks) become a formula to create in Excel. Two project management areas where Excel does shine is their project budgeting capabilities as well as for managing any project logs like issue, change, testing, or decision logs.

Use of Common Terminology

Excel doesn't provide common terminology and its help section is more related to formulas, charts and pivot tables than supporting any project terminology. Excel's lack of workflow and collaborative features are also another reason why it is not ideal for project team or stakeholder management.

Visualization Capabilities

Excel has a lot of options to visualize data in chart and graph forms – however if your project requires more than a simple chart you need to have some additional training to take advantage of Excel's visualizations. Even the creation of a simple Gantt chart to visualize the task schedule takes a lot of tweaking to show successfully. However, with a lot of work Excel can integrate data to provide some project dashboards –but again the development of this rests on the user.



Flexibility with Customizations

Excel does have a lot of customizations that and add-ins for many different applications like document comparison programs, document management systems. There are also a number of vendors that provide an add-in or templates to make it easier to use for project management. However I would not say that Excel is tremendously flexible with how their customizations can be configured.

Initial Setup Timeline

Most legal technology users already have Excel as a part of their standard desktop so set up time is minimal.

Available Support/Training

There is not a lot of support or training for using Excel as a project management tool. There are a handful of knowledge articles on the Microsoft site and some information on the Internet but there is no certified vendors or training since this is not the intended use of the application.

Cost/Versions Available & Application Integration

Costs per user

There is a free 30-day Excel trial with an MS Office 365 membership (approx \$7.00 per month).

Office 365 has bundled Excel as a suite with Word, a lightweight version Outlook, and PowerPoint (web versions) with small business packages that start at \$130 per year.

Moving toward enterprise versions – desktop versions of Microsoft Office that include MS cloud email hosting and SharePoint (such as their Enterprise E3 package) are available starting at \$300 per user/year.

Challenges with Updates/Maintenance

Excel does have its Web version with Office 365 that has minimal maintenance schedules however mostly this is installed on the desktop. MS Office updates for Excel are quarterly at minimum.

Mobile Support

Excel has never been the most flexible mobile application and this also applies in using it for project management. It does have a mobile version but would not be recommended for intense calculation tasks.

PROJECTS ONLINE

General Interface Design

For the purposes of this review, I decided to look at MS Project Online, which can be purchased as an extension to the Office 365 suite of applications. You can still purchase a desktop version of Project, but I felt that going forward, many users and teams would prefer the online version for its portability and integration with other elements of Office 365.

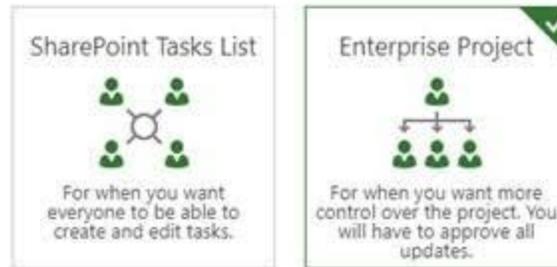
When you create a new project, you actually have two choices - to create a task list in SharePoint, or to create an "Enterprise Project". If you create a SharePoint task list the features and capabilities will be the same as if you created that directly through SharePoint, with the exception that the project will show up in the Project Center dashboard.

The SharePoint project will be reviewed separately, and so is not covered below.

I have used the desktop version of Project in earlier versions through Project 2013, but found the online version extremely limited and not particularly usable.

Create a new project

What kind of project?



General Usability

While the UI is appealing and will be somewhat familiar to desktop Project users, the functionality is extremely limited:

The screenshot shows the Microsoft Project web application interface. The browser address bar indicates the URL: <https://fenwicklabs.sharepoint.com/sites/pwa/Project%20Detail%20Pages/Schedule.aspx?ProjId=c42264c-e0ab-e811-8000-00155d0caf23&net=0>. The page title is 'Schedule: ILTA2'. The status bar shows: 'Status: Checked-out to you since 8/29/2018 4:07 PM Last Modified: 8/29/2018 4:30 PM Version: Draft'. The main view is a Gantt chart showing a project schedule from August 29 to August 31, 2018. The chart includes a table with the following data:

ID	Mode	Task Name	Duration	Start	Finish	% Complete	Work	Resource Name
1		Create project	3d	8/29/2018	8/31/2018	0%	0h	
2		Compare features	4d	9/3/2018	9/6/2018	0%	0h	
3		Write up	4d	9/10/2018	9/13/2018	0%	0h	
4		Send to ILTA	1d	9/17/2018	9/17/2018	0%	0h	

The Gantt chart visualizes these tasks as horizontal bars. The 'Create project' task is a light blue bar from 8/29 to 8/31. The 'Compare features' task is a light blue bar from 9/3 to 9/6. The 'Write up' task is a light blue bar from 9/10 to 9/13. The 'Send to ILTA' task is a light blue bar from 9/17 to 9/17. The chart also shows a 'Today' marker on August 30 and a 'Project Site' bar from 8/29 to 8/31.

The above screenshot is showing the schedule view for an "enterprise" project in the Edge browser. One odd and disappointing finding was that in Chrome the UI and functionality are reduced. Creating a browser-based application that works less well in Chrome than Edge takes some serious work!

Another odd finding is that while the simpler SharePoint list project allowed setting predecessor tasks, that was not possible in the so-called enterprise project. This is something that is extremely easy to do in the desktop version of Project.

Another problem was the navigation between the project dashboard where all projects are displayed, and individual projects. I regularly found myself at a dead-end, and the relationship between the dashboard view, individual project property pages, and task views was not clear or intuitive.

It should be noted that for full functionality, the user can install the Project 2016 desktop application and link it to the online project. Unfortunately, because I already have the desktop version of another Office project, the online installer would not work - so I did not test that. *For the remainder of this review I will limit my comments to the online version of Project.*

Use of Common Terminology

Anyone who has used MS Project on their desktop will be familiar with the terminology, but the significantly reduced feature set of the online version will prove frustrating.

See note in previous section about using Project 2016 desktop to address these limitations.

Visualization Capabilities

Very limited. A basic Gantt chart is the only online option. You can group and filter based on fields, which is somewhat helpful.

Flexibility with Customizations

Very few

Initial Set Up Timeframe

Setup of the online version was a snap. No install required unless using the desktop version of Project.

Available Support/Training

I did not research this but given how long MS Project has been on the market, and the prominence of Office 365, it's fair to assume that there are a wealth of support and training resources available.

Cost / Versions Available

Project online comes in three levels:

- Essentials - \$7/user/month

- Professional - \$30/user/month
- Premium - \$55/user/month

Application Integration

Integrates with Project desktop application

Challenges with Updating/Maintaining

As noted above, does not work well in Chrome (my preferred browser). Because Chrome fully supports HTML5, CSS3, and other standards, the fact that the UI works better in Edge than Chrome leads me to believe that Microsoft deliberately disabled the UI to incent users to also use their browser.

Mobile Support

There does not appear to be a mobile application for Project Online

How easily can people on the go access it?

Because it is browser-based, it can be accessed from anywhere, but as noted above there is no mobile support so effective use will require a laptop or tablet.

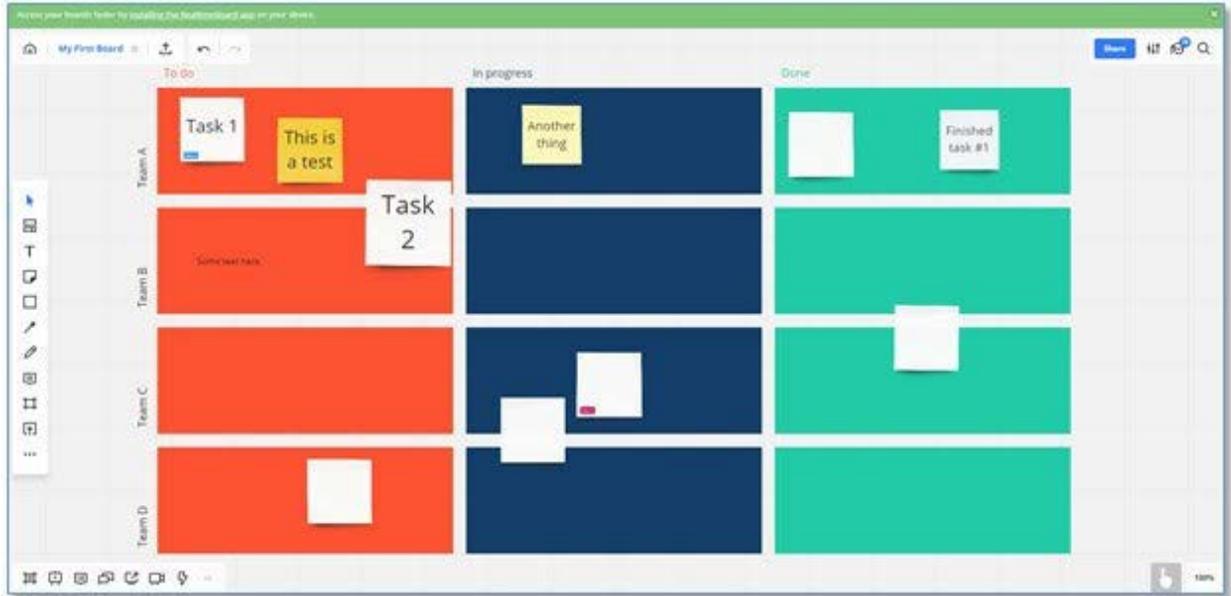
REALTIME BOARD

General Interface Design

RealTime Board is *not* a project management per se; rather it is a collaborative online ideation platform. It can be used to create and update a basic Kanban board, but I would not consider it a good choice for ongoing project management. Think of it as a specialized drawing application that can be shared across the Internet in real-time.

General Usability

If you've used Visio or similar drawing applications that use shapes to compose diagrams you will find RealTime Board easy to use:



Here I'm using the Kanban template. There are really no constraints; I can place notes, text, and other shapes anywhere on or around the board. In this sense it really is a visual representation of Post Its on a wall. So if you're a SCRUM/Kanban purist who believes boards must be physical, this is about the closest you'll get in software.

Use of Common Terminology

The software doesn't enforce any Kanban or scrum terminology, other than the fact that the Kanban template labels the three columns "To do", "In progress", and "Done" – of course those titles can be changed to whatever you would like.

Visualization Capabilities

None beyond the inherent visual metaphor of a Kanban board. There are no reports or charts available, because what you put on the board is not really structured data, but simply text and shapes.

Flexibility with Customizations

As with any drawing tool, what you put on the surface in terms of shapes and text is entirely up to you.

Initial Set Up Timeframe

I was up and running in about a minute – and that included creating an account and logging in.

Available Support/Training

There is online help. The product seems so simple that it's hard to imagine much support is required.

Cost / Versions Available

For three or fewer users, the product is free. Teams of 5-10 users range from \$40-\$80 per month when billed yearly. There is a "company" option that requires you to request a quote, and my assumption would vary in cost depending on the size of your firm.

Application Integration

None apparent.

Email Integration

Invitations may be sent via email. No integration with other software apparent.

Challenges with Updating/Maintaining

None significant.

Mobile Support

There is a mobile client available for download. One problem I see is that there's no way to zoom out, which means even a small Kanban board requires quite a bit of scrolling to edit:



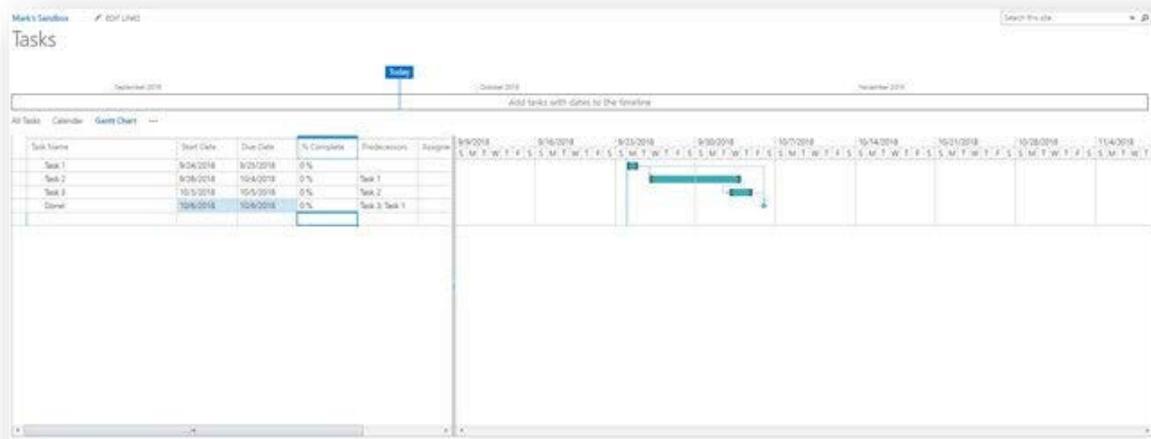
SHAREPOINT

General Interface Design

When using SharePoint for project management I assume the built-in task list template as the starting point. Once a task list has been created, users can add additional fields to track additional information related to project tasks. In addition, documents and other assets can be attached to any task, making it a very flexible solution. All of this is exposed within the simple SharePoint UI either on-premises or in Office 365.

General Usability

Task lists are simple and intuitive (think web-equivalent of a task-tracking spreadsheet). As with MS Project Online, SharePoint gives a small nod to more robust project management software by supporting a simple Gantt chart view. The Gantt even supports predecessors.



Use of Common Terminology

Hard to get confused with this level of simplicity – no fancy project management jargon is used. Anyone familiar with basic task management will be right at home.

Visualization Capabilities

In addition to the Gantt view there's a nice calendar view built-in (the same one many SharePoint users will already be familiar with). Beyond that, SharePoint lets authorized users create an almost unlimited range of tabular views, with built-in filtering, etc.

Flexibility with Customizations

Using SharePoint's web UI (either on-premises or in Office 365) a wide range of views can be created. In addition, custom fields can be added to the basic list to store

additional data. Supported custom field types include all the basics; date/time, lookup, person, textbox, etc.

Initial Set Up Timeframe

If all you need is a basic task list for a project, setup takes less than a minute. A bit more time will be required if you want to setup special permissions beyond what is already configured for your SharePoint list.

Available Support/Training

SharePoint has been around since the early 2000's, and there's a huge number of books, videos, articles, as well as countless training organizations to support its use.

Cost / Versions Available

SharePoint online is available from basic to full Office 365 enterprise plans, ranging from \$5/user/month up to \$20/user/month. If your firm already is a Microsoft customer, you may already own the necessary licenses. Microsoft

Application Integration

As noted above, documents may be attached to any task – which would represent the most basic level of integration. SharePoint lists can also be exposed in other Microsoft online products such as Teams. Because at its core we are talking about a SharePoint list, any 3rd-party tools to integrate SharePoint content with other platforms can be used. In addition, Microsoft's online workflow tool Flow can be used to access and process tasks, as well as write their data to many other products like Salesforce or Box. At the far end of the spectrum, SharePoint exposes all its content to developers through a robust .NET API, so that custom integrations can be created.

Email Integration

Users can subscribe to email alerts and using Flow or .NET a virtually unlimited range of custom workflows can be created.

Challenges with Updating/Maintaining

None significant.

Mobile Support

Task lists can be easily accessed through Microsoft's mobile SharePoint client, but the available views is extremely limited. Another option is to create a custom mobile client using Microsoft's PowerApps application. Performance in PowerApps can be a bit sluggish, but it does allow for some customization which may be necessary to get the most out of your list on a mobile device.

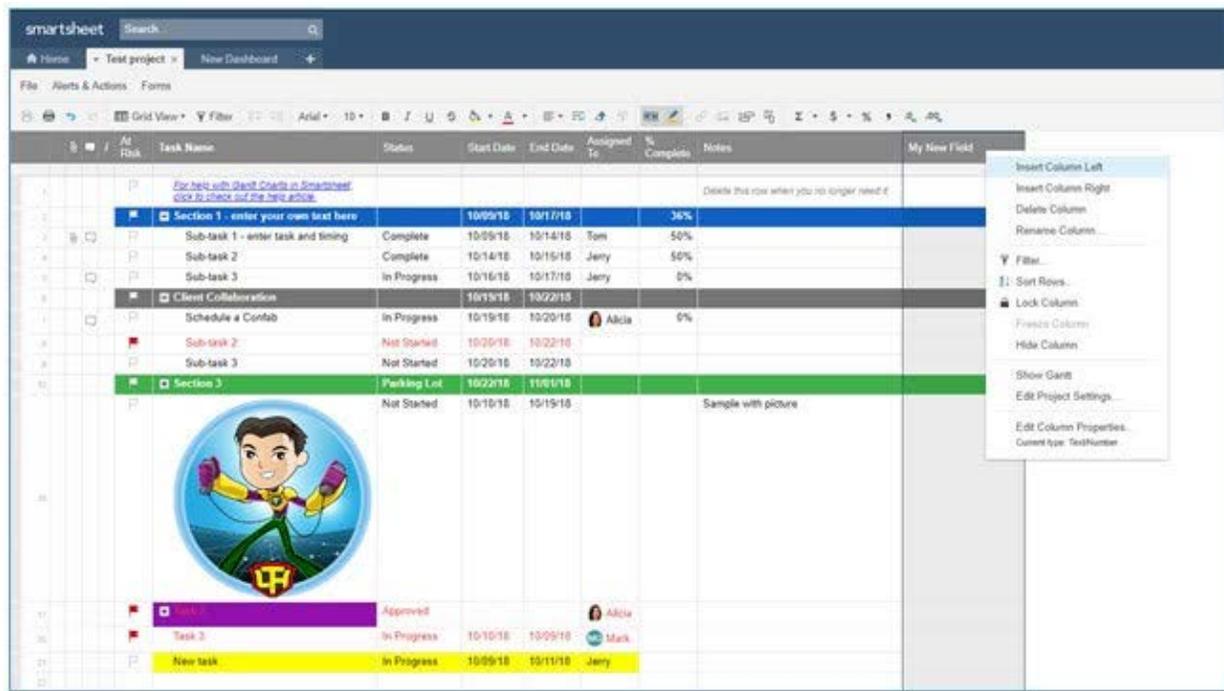
SMARTSHEET

General Interface Design

Smartsheet is a sophisticated task tracking tool presented through a deceptively simple UI. As with the other tools reviewed here, it all starts with tasks, which can be viewed as simple lists (“grid view”), Gantt charts, Kanban boards (“card view”), or calendars. All of the views are easily understandable. You can create customized alerts as well as data entry forms to input new rows into a sheet.

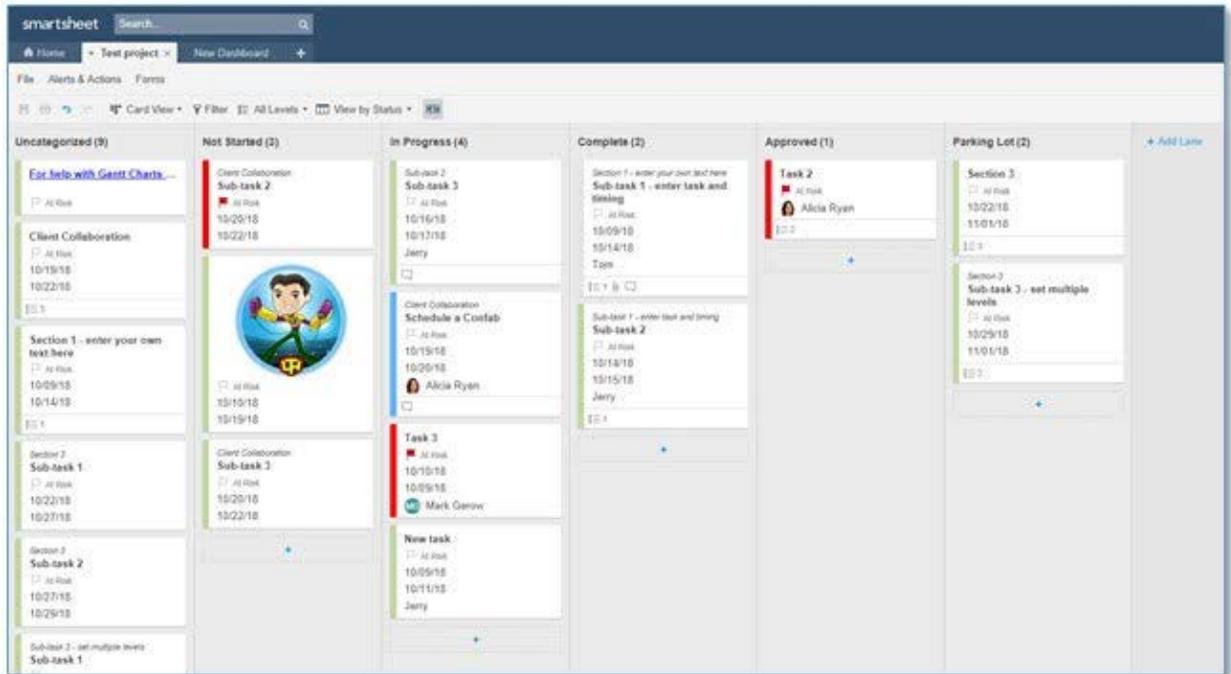
General Usability

The default view of your data is a “sheet”. Tasks in the sheet may be in an outline form, and collapsed or expanded for a better view. Sheets can also include images and other rich data.



Task Name	Status	Start Date	End Date	Assigned To	% Complete	Notes	My New Field
Section 1 - enter your own text here		10/05/18	10/17/18		36%		
Sub-task 1 - enter task and timing	Complete	10/05/18	10/14/18	Tom	50%		
Sub-task 2	Complete	10/14/18	10/15/18	Jerry	50%		
Sub-task 3	In Progress	10/16/18	10/17/18	Jerry	0%		
Client Collaboration		10/15/18	10/22/18				
Schedule a Confab	In Progress	10/15/18	10/20/18	Alicia	0%		
Sub-task 2	Not Started	10/20/18	10/22/18				
Sub-task 3	Not Started	10/20/18	10/22/18				
Section 3							
Parking Lot	Not Started	10/22/18	11/01/18			Sample with picture	
Task 1	Approved			Alicia			
Task 2	In Progress	10/10/18	10/09/18	Mark			
New task	In Progress	10/09/18	10/11/18	Jerry			

The same sheet in “card view” allows users to easily drag-and-drop tasks to change their status:



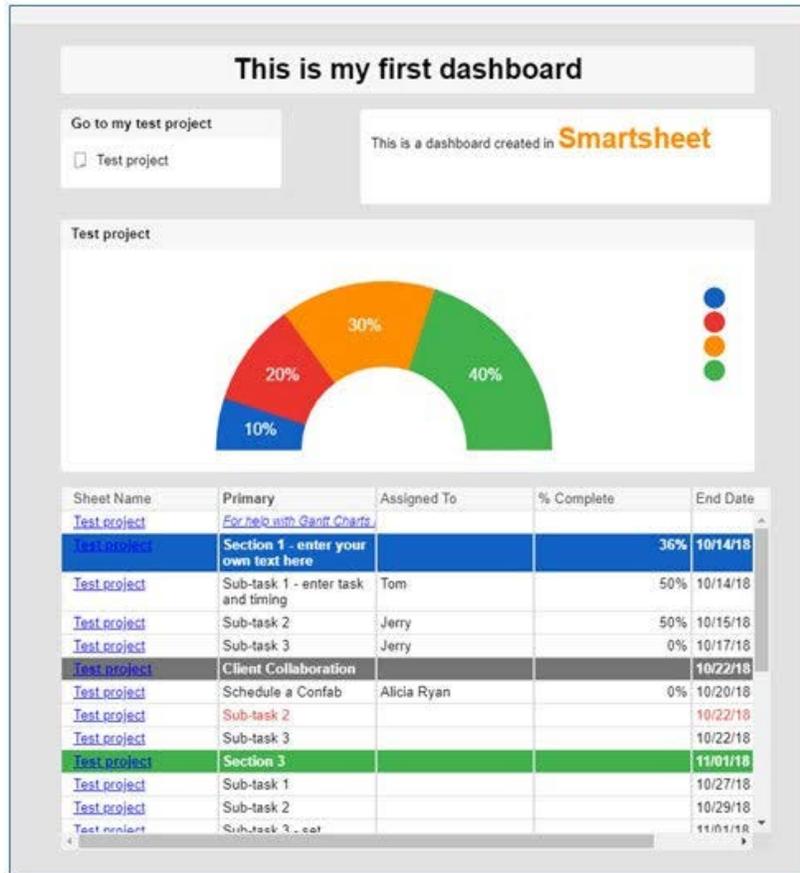
Feedback from attorneys and others at our firm has been quite positive. In particular, professionals without project management or technical experience find the sheet view easy to grasp and work with.

Use of Common Terminology

In general, there are no project management buzzwords used. Standard fields include “task name”, “start date”, “% complete”, etc. While the I would prefer “Kanban view” to “card view, I think users not familiar with SCRUM or other Agile methodologies will prefer the former. So while project management or SCRUM purists may grumble, typical end-users should be comfortable with the terminology right away!

Visualization Capabilities

In addition to the views noted above, you can create “dashboards” that combine a variety of information and allow for quick navigation to sheets or outside links:



These dashboards do not replace full-on applications, but can provide some high-level information, and make accessing the underlying sheet(s) easier for occasional users.

Flexibility with Customizations

It's easy to imagine Smartsheet being used for a variety of data collection tasks, and not simply for project/task tracking. Authorized users can easily add new fields ("columns") to the sheet and can create a variety of data entry forms with the drag-and-drop designer.

Initial Set Up Timeframe

Getting started is quick and easy. Nevertheless, learning about the features took more time than some simpler products reviewed here (e.g. Microsoft Planner or Realtime Board – two products with many fewer features). However, given the feature set, I would rate setup very good.

Available Support/Training

As I accessed a feature for the first time I was offered training information (including videos). The built-in help is high quality, and Smartsheet offers community forums, blogs, and 1-1 training.

Cost / Versions Available

Smartsheet offers three tiers: Individual is \$14/month/user and includes basic views and mobile access, Business tier is \$25/month/user and adds dashboards and workflow (the alerting noted above), and Enterprise adds single sign-on along with additional features.

Application Integration

Smartsheet can integrate with Box, Dropbox, Salesforce CRM, DocuSign e-signature, Workplace HRIS, and many other platforms.

Email Integration

Alerts and invitations integrate with email.

Challenges with Updating/Maintaining

None significant.

Mobile Support

There is a mobile client available for download. The only obvious difference between this and the web UI is that the Kanban (“card”) view is replaced in the mobile client with a “List” view. I presume this IS out of consideration for the smaller screen size:



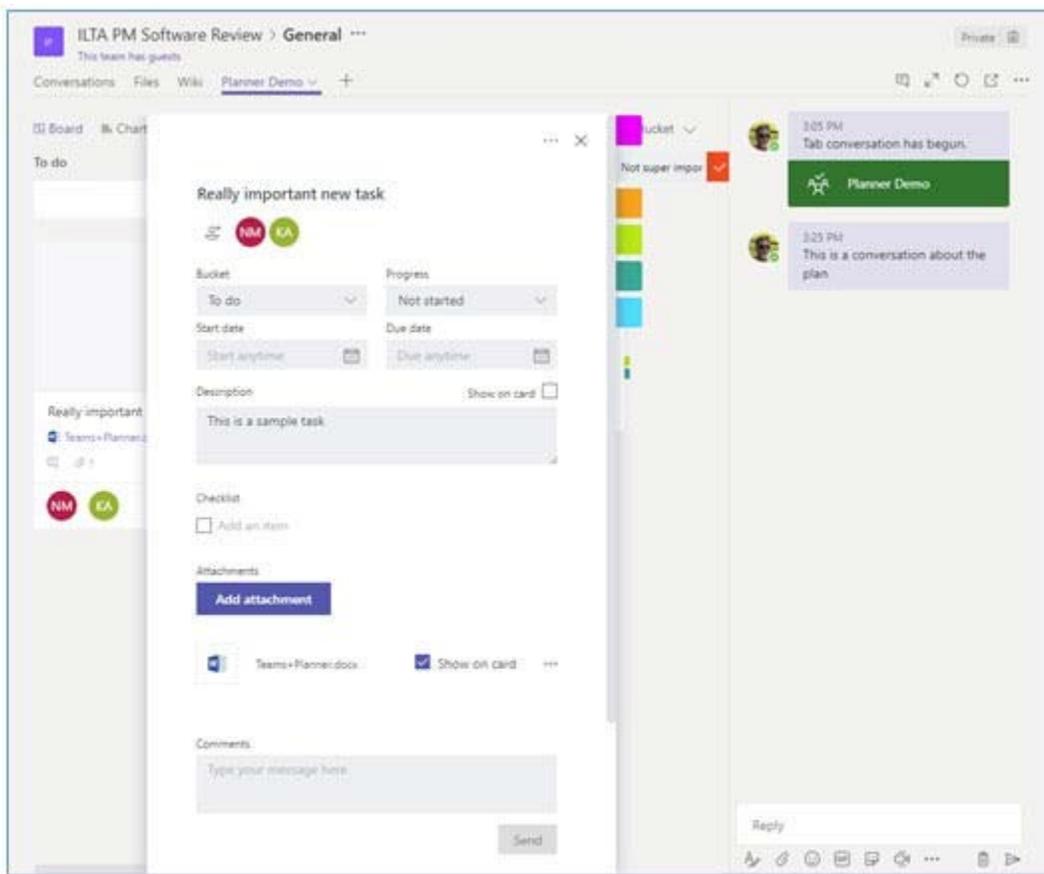
TEAMS + PLANNER

General Interface Design

Microsoft Teams+Planner provides a super-simple UI suitable for those using Office 365 and Teams who don't need much customization at all. If you have Office 365 and want a dead-simple task tracking solution that anyone can use with minimal training, this may be your best bet.

General Usability

Very easy to use – but also very few options. If you want project management your way, this may not be a good choice. Nevertheless, if you currently use Office 365 and want to get started fast can't think of a better way to go.



The metaphor is a simplified Kanban board, with tasks grouped in “buckets”. You can assign tasks, add comments and attach documents. When tasks are grouped by progress, you can drag tasks to change their status on the board. A few limitations to keep in mind:

- You can't add or change status codes, you only have three: not started, in progress, and completed – if you need more (e.g. “on hold” or “blocked”) you may want to look at some other product
- There's no way to add custom fields to a Planner list

Use of Common Terminology

Planner uses mostly common terminology – but not quite. It is sort of SCRUM-like. However, given the simplicity, it won't take users long to get used to it.

Visualization Capabilities

Planner has just three views: Board (shown above), Charts, and Schedule:

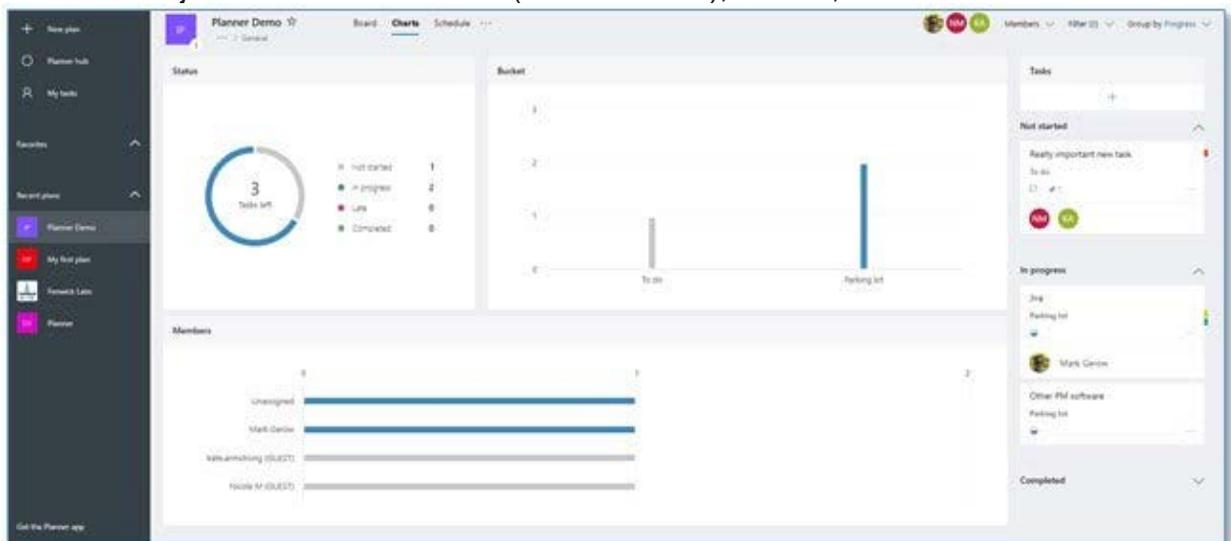


Figure 1: Charts view

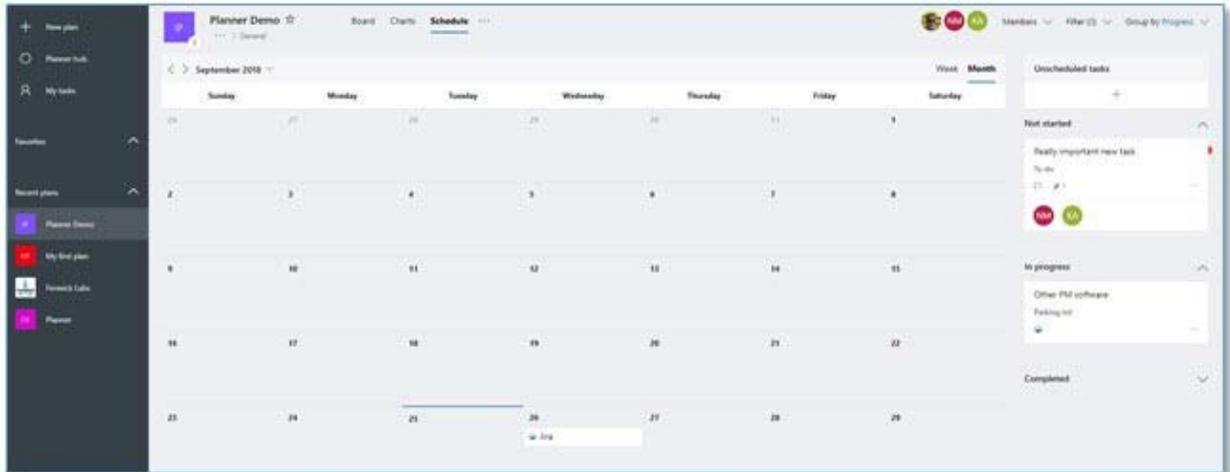


Figure 2: Schedule view

These views are not customizable.

Flexibility with Customizations

You do have a few ways you can customize Planner:

- Add “buckets”
- Change titles of the titles (colored flags that you can attach to tasks)

That is really it. As noted above, the beauty here is extreme simplicity.

Initial Set Up Timeframe

Zero if you already have Office 365 enterprise. Simply create a new plan and start entering tasks.

Available Support/Training

Planner is a newer member of the Office 365 suite, but given its parentage, there is already a large and growing number of posts, articles, and other resources available. However, it's so simple most users won't require much training or support.

Cost / Versions Available

There is only one version of Planner, which is available in the Office 365 Business Premium (\$12.50/user/month) and Business Essentials (\$5/user/month) packages.

Application Integration

Planner tasks can use attachments from Office 365 SharePoint Online sites. You can also upload documents directly from your local drive. Planner can be used standalone view the Office 365 web UI, or integrated into MS Teams.

Note: not all Planner features work in Chrome. For example, drag-drop of tasks across buckets worked fine in Edge, but not in Chrome. I did not test in Firefox or Safari, but you should test in your target browser(s) before adopting.

Email Integration

Assignees will receive email notifications

Challenges with Updating/Maintaining

None significant.

Mobile Support

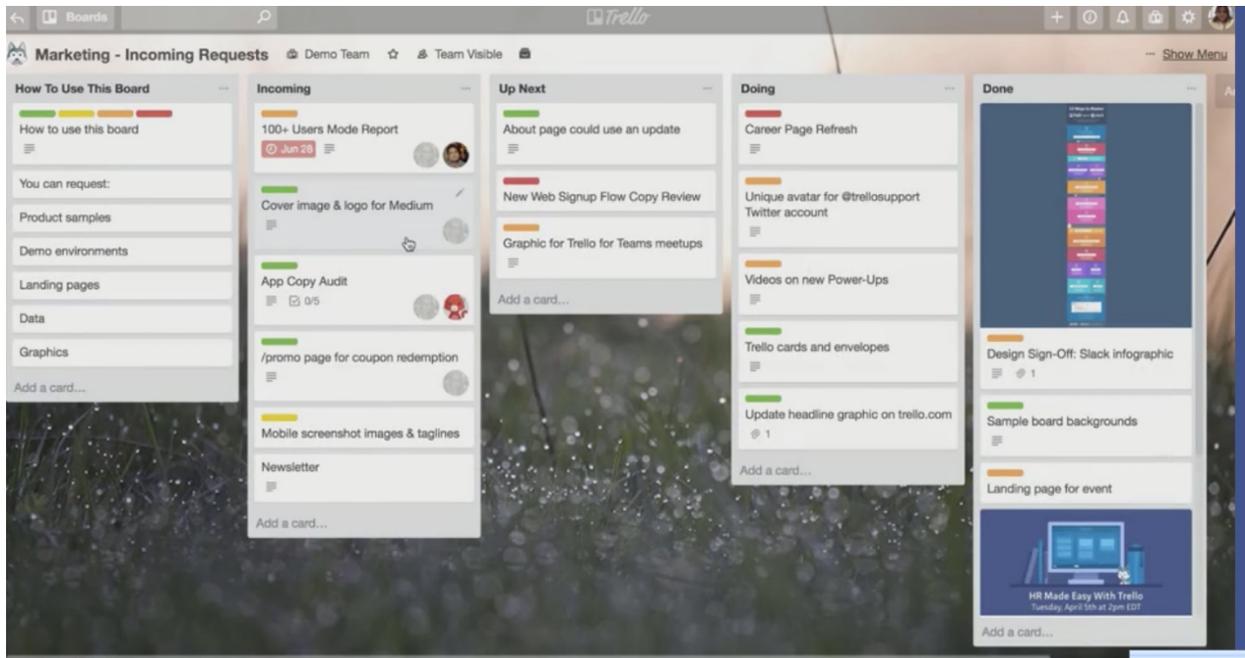
Microsoft offers a free mobile app for Planner for both Android and iOS. This app lets you create and edit Planner tasks while on the go. The UI is quite basic but will get the mobile job done without additional cost.

TRELLO

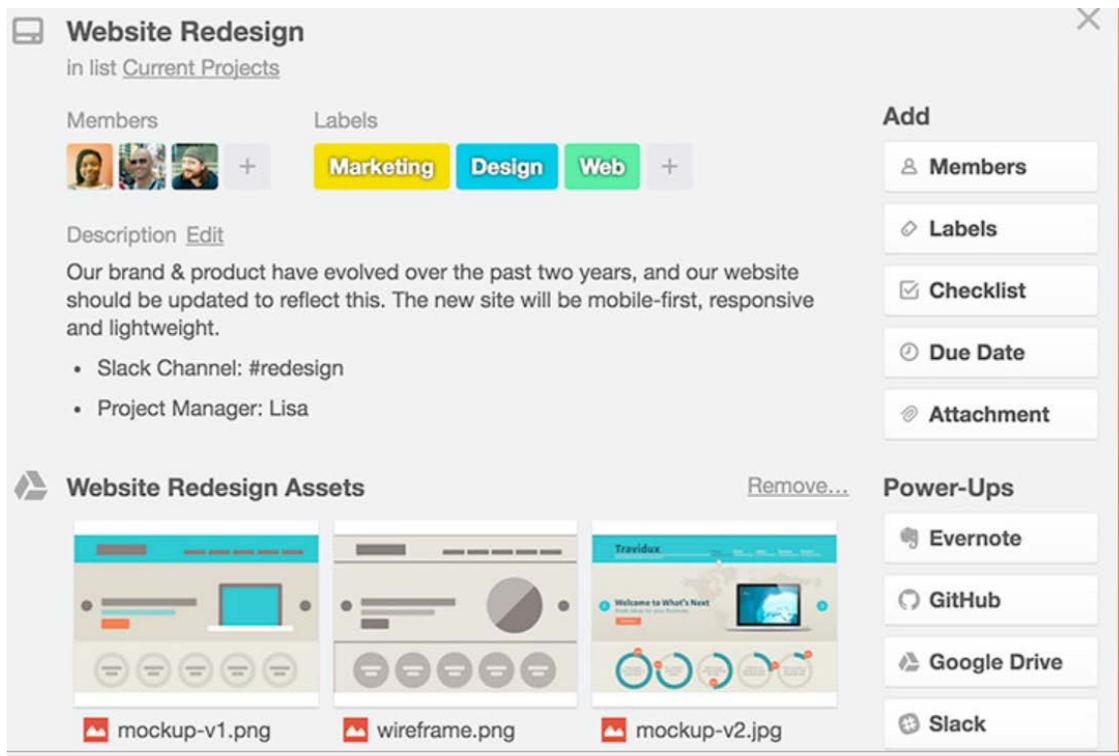
General Interface Design

Trello is a bit different than a general project management software because it comes from the developer world of Kanban boards.

Instead of projects – it uses something called “boards’ of which each board can have cards added to it.



A card is a bit like a high level task in that you can add team members who are responsible for things. Cards can have checklists for subtasks as well as documents attached to it. The cards also can have a calendar for due dates. They can also have integrations' called power ups available..



General Usability

Set up looks to be very quick and easy in their on-line platform. I think this application would be very useful for teams who are doing a repeatable process that is already well known (for example a real estate closing transaction) but would be challenging to use for projects with uncertain scope or duration.

Trello seems to be very useful for team and cross departmental collaboration, and communications on discrete tasks within a project ... what is more challenging is how each card will roll up into a board to determine overall project scheduling, and even more challenging – cards don't seem to be able to be linked so each of the tests seems to be running at once so you can't determine dependencies between cards or major tasks.

Use of Common Technology

Trello is useful for team members in that it uses every day terms like due dates and checklists for subtasks.

Visualization Capabilities

This I think is where Trello is challenging because there is no overall visual to describe the project. The team board only has a collection of cards and you have to dive into each card to see where task and subtasks are completed. You can connect and add visualization tools with their PowerUp integrations but this comes at an extra cost.

Flexibility with Customizations

Customizations is where Trello really is strong. Their integrations are called PowerUps, and depending on your subscription level you can have a number of Integrations to common business applications like Evernote, Slack etc. However most of the integrations are with business focused applications and do not connect to Document Management Systems, eDiscovery repositories, Tickler systems or other essential law applications.

Initial Set Up Timeframe

Setting up an initial board with the free public options is very quick. However having an enterprise Trello system set up with administration, security and access would take considerably longer.

Available Support/Training

Trello has some initial set up guides on their site but relies on 3rd party trainers for Trello certification. Enterprise users can receive customized training webinars directly from Trello.

Cost/Versions Available & Application Integration

Costs per user

- Trello Basic (10GB storage per board and one integration) – Free

- Trello Gold (250GB storage per board and three power ups integration) - \$5 per month / \$45 per year
- Trello Business Class (unlimited Powerups, Admin options, 1-day email Support - \$119.88 per year
- Trello Enterprise for 100+ users – (with SSO, 2 Factor Authentication, file encryption, 1-day telephone support, custom onboarding) - \$250 per year
- Trello Business Class and Enterprise also have the ability to export a boards information into other formats.

Challenges with Updates/Maintenance

Since Trello is only available in a web mobile version so it is maintained centrally on the Trello servers. They seem to do iterative maintenance and updates.

Mobile Support

Trello's mobile capabilities are very strong as its app is compatible for web portal, smartphones and iPads and supports real time data information and updates.