The Genius Project solution goes beyond simple planning; it covers all phases of a project as well as the management of all the documents related to a project. Genius Project coordinates projects through logical and chronological segmentation.
Benefits by Role

The right solution for everyone

Different people have different needs. Genius Project ensures that you offer the right functionality to the right people.

Executive

- Evaluate project requests and select according to ranking and value
- Align and measure project portfolio with business strategies
- Gain maximum visibility into project data
- Have maximum control, flexibility and visibility
- Display Gantt chart for more than one project to get a global portfolio view

Project Manager

- Clearly define project scope, objectives and participants
- Improve planning and reduce time-to-market
- Optimize resource allocation and reduce costs
- Reduce communication efforts from project manager
- Anticipate budget and cash flow troubles
- Identify issues and prevent budget over-runs
- Avoid unprofitable projects
- Use gathered data to improve future project forecasting and budgeting
- Practice proactive project management by anticipating risks and their impacts

Project Team Member

- Improve project quality and delivery
- Ensure everyone is clear on their deliverables and to-dos
- Achieve quicker response times and better communication
- Improve access to project documentation and ensure quality standards
- Simplify information sharing
- Improve risk and issue awareness
PPM Software Features

Everything you need to succeed

It doesn’t take a genius to know your company’s success depends on the success of your projects. It does take Genius Project to automate all your projects, people and priorities across the entire organization.

Project portfolio management
Genius Project provides the tools necessary for organizations to ensure their projects are in line with the company’s strategic objectives as well as the functions required to track, manage and manipulate their projects from a high level.

Planning and Gantt Chart
The Genius Planner Gantt chart tool is designed to facilitate project planning and resource management simultaneously. Use it for individual resources or allow managers to use it for their entire teams.

Resource management
The Resource management module and tools help team and project managers view their resources’ availability, workload and capacity filtered by a variety of different criteria helping PMs select the best resources for the job.

Time and expense tracking
The Timesheets module provides a one stop shop for gathering all actual labour and expense costs generated and incurred by resources for each individual project.

Project Tracking
Using the following Genius Project tools, project managers will be able to maintain a constant eye over the progress of their projects and efficiently plan and track their completion.

Cost and budget management
Genius Project’s cost and budget management takes the math out of budgeting. By simply having resources input their expenses and time, Genius Project automatically does the rest.
With Genius Project, you get a complete project portfolio and project management solution that will connect the various departments within your organization, facilitate communication and ensure uniformity of enterprise processes and workflows. Each feature of Genius Project reflects our years of experience and knowledge in project management and our dedication to helping you succeed.

**Invoicing**

Genius Project’s invoicing module is the natural next step in cost & budget management of projects. It includes all of the tools necessary to either automatically generate invoices for all billable labor and expenses captured in the software or to schedule billing milestones.

**Demand management**

Using the various demand management tools, companies can design unique request, approval and tracking workflows to capture the specific information and standardize the collection of data across projects, departments and/or even the entire organization.

**Document management**

The document management module provides companies with a central repository for all project related documents. Information can be sorted using various different criteria and simplify access to project information for different users with different needs.

**Collaboration with Genius Live!**

Genius Live!’s familiar social interface will improve collaboration among your project teams, streamline the flow of project information, provide a better end user experience and increase productivity and application adoption.

**Risk and change management**

Using Genius Project’s risk and change management modules companies can automate their internal methodologies, build mitigation plans into their project plans and track all problems and changes for future reference.

**Dashboards and reporting**

Genius Project offers companies the ability to design sleek dashboards including views and charts for each of the different application modules in addition to the vast list of canned dashboards, charts and views already pre-loaded with the software.
Project Portfolio Management

Get aligned, speed-up ROI

Make the right choices and increase productivity and ROI with the right strategic mix of projects. Manage the project pipeline and prioritize projects according to strategic alignment and constraints. Genius Project’s portfolio capabilities allows you to group actual and potential projects so you can define scores and compare them at the portfolio level.

Base your decisions on accurate information. Define your own key performance indicators (KPI), access information through visual charts and reports and get e-mail alerts for critical decision factors.

Genius Project provides high-level portfolio views of the entire project portfolio. Projects may be grouped by business unit, division or department hierarchy. This provides management with a powerful enterprise-wide view of project statistics.

The portfolio dashboard brings together the critical elements of portfolio monitoring, issues, schedules, deliverables, risks, and metrics. Executives can quickly identify trouble areas, and drill-down for more details.

Genius Project’s Key Performance Indicators. Using the Genius Key Performance Indicators you can effectively align projects to your corporate strategy. This KPI module is designed to translate your organization’s mission and business strategies into performance measures and operating objectives. It allows you to align project impact with corporate strategy to help maximize ROI.

Highlights

- Strategic Alignment
- Hierarchical Portfolio
- KPI Definition
- Portfolio Analysis
- Project Ranking
- Financial Planning
- Project Request Management
Planning and Gantt Chart

Powerful interactive Gantt chart and scheduling tool

Genius Planner. The powerful and feature rich alternative to Microsoft Project is a Java based tool providing a web based comprehensive «Microsoft Project like» scheduling and planning tool in the form of the Gantt chart/diagram.

It's never been so easy to visually plan and modify projects, assign and link tasks, determine workload, base line, and cost estimates in a web based Gantt chart, that supports all functions you are used to having, as drag & drop facilities.

Genius Planner also provides advanced resource management functions, aiding you in spotting bottlenecks and under utilization of resources, in order to maximize and optimize the resource’s usage in a multi-project environment.

Integration with Microsoft Project. Genius Project provides a unique integration with Microsoft Project that enables the export and import of any plan into MS Project software. In addition to this, it allows you to synchronize a Microsoft Project plan from anywhere within the project repository.

Genius Simulator. Change is probably the only constant variable project managers can depend on. Whether it is shifting priorities or the change in resource availability, preparing for the unexpected is essential for realistic project planning. Genius Project now provides a planning tool that enables managers to create “what-if” scenarios and determine how each scenario will impact your project’s resources and deadlines.

Highlights

- Powerful Gantt chart
- Easy resource and team scheduling
- Multi-project Gantt chart
- Manage cross project resource usage and allocation conflict
- Genius Simulator
- MS Project integration
- Streamline planning processes and task list distribution
Resource Management

Gain full visibility into resource supply and demand.
Build the strongest team for your project

Maximize the ROI from your people. Genius Project's Resource module enables organizations to gain optimal results from their most valuable asset – their people. To speed time-to-results, organizations must quickly find the right people and form interdepartmental teams to resolve complex problems.

Centralized management of project resources to facilitate project administration. The management of project team members in a centralized manner allows you to automatically ensure the consistency of information for those people that are not only actually involved, but also those that are potentially involved, across a range of projects.

Resource availability management. Graphical and simple dashboard views are used to identify assignments and ‘free’ time of resources; information is also available to show skills or a particular competency.

Dynamic resource allocation. Within your project and process models you can define resources in terms of the role they will play (for example: project manager, designer, developer, system architect).

Advanced resource search functions. Genius Project provides the tools to enhance your staffing processes. Do a quick and simple resource search based on skills and availability, then drill down to specific information about each person, including skills and individual calendars. You have instant visibility into the resource pool, making it easy to find available, qualified people across an entire global organization.

Highlights

- Maximize resource utilization
- View resource schedules and availability in real-time
- Increase accuracy of resource and team planning and forecasting
- Create more effective and profitable project teams through appropriate staffing
- Availability management
- Capacity planning
- Generic resource and resource profile
Well, now you can! Genius Project is a powerful project management software that links timesheet data directly to a project and updates the information automatically.

**Easy-to-use user interface.** Genius Project provides an easy-friendly way of collecting actual hours and estimates of time required to complete tasks related to projects. When entering the data, an individual can also enter comments or detailed information on the nature of the time spent. When timesheets are completed, users can send an approval request to their project manager using the workflow feature or the timesheet can be approved automatically (depending on the configuration).

**A complete picture of resource usage and costs.** All entries in timesheets are calculated and charged to specific projects. Each resource is assigned to an internal cost structure and a billing rate that is dependent upon the role they perform. Costs are calculated according to the planned time, time actually spent and time billed. Therefore, a complete picture of resource usage can be obtained and the financial implications (including budgets, costs and margins) can be identified. Detailed views allow management to track project hours and costs. Leveraging advanced reporting functions or advanced Microsoft Excel export (built-in), managers can create tailored views and reports.

**Input expenses directly into corresponding projects.** Consultants and other collaborators that travel frequently can associate their expenses directly to the corresponding projects. This is a time saving function that accelerates project invoicing and reduces the reimbursement effort for collaborators.

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**Timesheets and Expense Tracking**

**What if you could link timesheets and project costing?**

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**Highlights**

- Weekly time and expense reports
- Compliance reporting
- Approval workflow
- Detailed reporting views

- Task re-estimation process
- All standard reporting tools supported
- Export to Microsoft Excel with field to cell mapping
Detailed Project Tracking

Ensure on-time project delivery
Staying on track means keeping track

**Project monitoring.** To be pro-active and for optimal project steering, Genius Project provides you with all the essential information to monitor your projects: resources used, estimated and actual costs, deliverables, task progression, and a lot more.

You know what has been done, how long it took, the costs, what remains to be done, the problems encountered and the results.

**Visual indicators.** Easily interpreted progress reports and delay management are provided. You always know who and what. Resource allocation and expenditures, as well as the control of time spent, puts an end to any possible project slippage thanks to an effective and accurate detail tracking and escalation system.

**Genius Project Dashboards** are displays that summarize details in a concise management summary. These displays show interpretive color-coded indicators and a collection of project statistics. The six standard project indicators shown are Time, Cost, Effort, Progress, Issue and Risk. For each project you set targets for the Completion Time, Budget and Completion Effort.

**Personal project tracking.** Genius Project provides a personal dashboard to see all your planned, ongoing and requested activities, the documents and reports you have to work with and a clear view of the process and workflow you are involved in.

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**Highlights**

- Accurate tasks and to do follow-ups
- Visual indicators
- Delays, alerts and reminders
- Actual vs. Planned
- Deliverable tracking
- Approval tracking
- Personal dashboard
- Personal calendar
Cost and Budget Tracking

Staying on budget is critical to success
Make sure that your projects do

Cost tracking is essential to measure project performance vs. budgets. Genius Project compares planned vs. actual expenditures vs. estimated work completion to highlight budget drifts.

**Cost and budget management.** Genius Project puts all elements necessary for cost and budget management of your projects at your disposal. Reporting, management and the ability to take an overview of the discrepancies, provide a clear and accurate picture of budget status.

Genius Project allows you to calculate and adapt your budget management, regardless of whether your budget is based on annual costs, quarterly costs or on one or multiple cost centers. After assessing your fees and defining your purchases and expenses, Genius Project allows you to establish a preliminary estimate of fees and costs. By readjusting resource costs and personnel used, you are able to carry out “what if” calculations.

**Cost and rate management.** Genius Project has the ability to maintain multiple rate matrices that establish bill and cost rates for labor, expenses, materials and others. Further, it can do this in multiple currencies.

**Cash flow.** Genius Project's intuitive tables show required cash flow for each project period (months or weeks) including labor costs, purchases and expenditures.

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### Highlights

- Detailed dashboards to follow cost, budget and margin
- Multi-rate
- Tracking time, expenses, products
- Multi-currency capabilities
- Cross-charging support
- Cash and calculation
- Easy detailed & customizable project budget
- Automatic calculation of actual and re-estimated costs
Document Management

Improve resource output by eliminating duplication and paper waste

Genius Project manages all documents related to projects. It provides document templates and helps in the structuring of information. These can be easily extended with a series of pre-defined documents, according to your requirements.

Centralized document management. Genius Project and its internal templates allow you to integrate all your documents into the reference system, whatever their format (Excel, Word, Wordpro, Photoshop, Paint Shop Pro, Adobe Acrobat, AutoCAD, etc.). You can then design your own document formats.

A real project documentation tool. Genius Project is more than just a file store in the project database, it also allows you to attach files and comments to any piece of information, such as tasks, deliverables, project descriptions, and many others.

Microsoft Office integration. Genius Project’s Microsoft & Open office integration allows you to produce richly formatted Microsoft Word, Microsoft Excel or Open office documents with your project data. Users can create new Microsoft Word documents, Microsoft Excel worksheets or Open office-based documents upon user-defined templates. Depending on the template setup, Genius Project will populate the document fields with corresponding project data – a feature similar in concept to a mail-merge.

Classification. Genius Project allows you to classify all your documents with up to 20 different criteria and to link related documents.

Highlights

- Streamline the collection of new work and project requests.
- Provide a thorough and documented review process.
- Establish common criteria for incoming requests and simplify choice.
- Collect, track and review, all requests through a central repository.
- Define common metrics, key performance indicators (KPIs) and risk factors for evaluating performance.
Process Automation & Collaboration

Stay connected and share information for effective collaboration

Process and workflow support. Define the workflow yourself in order to automate and support your business processes. Organizations can incorporate the desired flow cycles, gates, typical phase reviews and approvals that meet their organizational requirements.

E-mail notification. This feature is quite popular among Genius Project users as it permits excellent communication within a team. Each user may decide to receive an e-mail when he or she is assigned to a new task or when one of their tasks (or any other kind of documents) are modified. This frees the project manager’s time for more important tasks. E-mail notification, is automatic!

Collaboration. Genius Project enables project managers to assimilate users outside of your organization, without jeopardizing your corporate structure or your security policies. All the project team members stay connected and share information for effective collaboration, performance and response. Teams are constantly more knowledgeable, which leads to better decisions and reduced costs.

Social Team Collaboration. Genius Live! is Genius Project’s social collaboration platform that takes enterprise project and portfolio management to the next level. Genius Live! will empower your users by delivering a collaboration platform that will introduce powerful social media capabilities familiar to today’s information worker. Project stakeholders will benefit from Genius Live!’s social interface improving team collaboration, providing a better end user experience, streamlining the flow of project information and increasing productivity among project teams and application adoption.

Highlights

• Automatic distribution
• E-mail and to-do notification
• Calendar, e-mail and to-do integration
• Synchronization between planning tool and calendar

• Approval cycle
• Role based workflow engine
• Project wall
• Social Team Collaboration
Risk and Change Management

Change is a good thing when done right... but it can often be rife with issues

Risk management is crucial to the success of any project. Genius Project allows team members to contribute to the risk registration for a project, identify severity of the risk, analyze its impact, and discuss ways to mitigate the risk.

Change management. Genius Project makes it possible for the team to clearly document changes, evaluate the impact, identify the affected items, and translate the new business needs to specific tasks that can be directly assigned to team members. An integrated routing process helps in both the evaluation as well as approval of the change request.

Issue tracking. Genius Project allows all stakeholders to report issues and keep track of pending issues in the project. The integrated notification reporting and tracking of issues, changes and risk, helps in project level quality assurance.

Help Desk. For many organizations, Help Desk is seen as a support function that IT needs to address quickly with minimal impact on their projects. In reality, poor Help Desk management can lead to an inferior customer experience and lack of performance from your support staff. Delivering an integrated solution, Genius Project allows you to have single point of access to your project statuses, portfolios health and daily logged events. With Genius Project’s work flow engine you can easily capture and manage Help Desk events improving the quality and speed of your service.

Highlights

- Risk impact and probability analysis
- Mitigation plan
- Issue Management
- Change Management
- Analysis of forecast and actual impact
- Help Desk
Dashboards and Reporting

Enhance project analysis with powerful project analytics and reporting software

Genius Project provides a powerful platform for reporting, analytics and information delivery. It combines report creation and analytics tools with a content management and delivery system. Genius Project’s analytical capabilities gives portfolio users and the project manager the big picture while allowing them to drill-down to the smallest detail.

Project dashboards and Genius charts. Genius Project offers 100% configurable dashboards which can contain only the views or graphics you want, or a combination of both. Once defined, these dashboards can be made available to all users simply by adding them to the navigation. Genius project comes with a collection of predefined dashboards, but you can create and store your own. Genius Chart allows users to easily create or customize charts, including drill down capabilities.

Analytics and ad-hoc reporting capabilities let users create ad-hoc reports with the ability to query, filter, group, compute and format data from Genius Project views on-the-fly.

Genius Project’s reporting engine is an effective communication tool for sharing information on the advancement of a project with all people concerned – internal and external. Our server based report engine can even automatically generate reports in Adobe PDF format.

Reporting with Microsoft Excel. Transform any Genius Project view into a Microsoft Excel report or chart. Create your reports layouts once, store them in the template repository, and use them many times.

Highlights

- Built-in Genius Chart report generator
- Set of pre-defined
- Configurable dashboards
- Batch generation
- Secured access to reports
- PDF format reports
- Automatic generation and distribution of reports
- Microsoft Excel report
Configurable Workflow Engine

**Workflows mapped to your business processes**

**Workflow engine.** Organizations can easily define workflows themselves to automate the flow cycles, gates and typical phase reviews and approvals necessary to comply with their business processes and their organizational requirements.

**Business Rules.** The workflow engine delivers powerful functionality allowing organizations to create business rules as information moves from one status to the next. Business rules may include the automatic trigger of email notifications, as well as formulas that can be applied to provide flexible creation of restrictions, actions and inaction mirroring an organization’s approval process.

**Phase-Review Support.** Genius Project is shipped with standard business process workflows that can adapt to any approval and gated process an organization needs to follow. Furthermore, Genius Project provides approval workflows designed for R&D and New Product Development (NPD) providing organizations full support of score cards and gates.

**Highlights**

- Approval cycle
- Role based workflow engine
- Automatic distribution
- Email and to-do notifications
Solutions for Business Processes

We adapt to you, not the other way around

Processes such as reviews, approvals, and others can be tailored using Genius Project's automated workflows and process design. Project templates can be used by PMOs to ensure compliance with company-wide standards for common project scenarios. This ensures that all projects of one type will have the same structure, and will result in making it easier for everyone to follow and collaborate.

The need to standardize processes across entire organizations exists within companies of all sizes. With as many processes as there are companies, no single model can satisfy them all. Thanks to the flexibility of Genius Project software and its ability to adapt, your company can continue following the processes that work best for you.

Our strength lies in the logic of project management and our expertise lies in the ease of mapping your processes into our project management software.

Don’t change a thing. Genius Project likes you just the way you are.
New Product Development

Shorter time to market

Project and portfolio management is a critical piece to any new product development project. Effectively managing a new product development project requires a global view of the product pipeline and its impact on the organization’s bottom line, competing projects and the people responsible for its successful delivery.

Furthermore, with increased competition, globally dispersed workforce, and the complexity to comply with varied industry standards and meet customers’ expectations, a project portfolio strategy for product development projects is necessary to provide the required visibility to quickly respond to market demands. Genius Project delivers executives, PMOs and project leaders leading edge project and portfolio reporting, tracking and execution tools supporting industry standards for new product development projects. Mapped to your organization’s business processes, Genius Project’s workflow engine allows for configurable phase-review processes, score cards and project documentation, tracking new product development projects from ideation to Commercialization.

Product Development Lifecycle

Priotize Ideas  Allocate Best Resources  Deliver Project on Time and Budget

Project Performance Management

Highlights

- Improve project portfolio, project and resource visibility
- Reduce time to market
- Improve quality management & assurance
- Ensure compatibility with industry processes and standards, Phase or Gate Review and Approval, APQP, etc.
IT Departments

Is your IT department demonstrating business value?

As businesses evolve, more and more, Information Technology is moving from a supporting function to a strategic player driving an organization’s success. Today’s CIOs and IT departments understand that without the strategic alignment of IT and the corporate objectives set forth by their business leaders, their organizations can quickly lose momentum, customer confidence, and their competitive edge. In light of this reality, CIOs and IT departments demand better tools to better support their organizations in delivering higher quality service to their stakeholders.

Genius Project delivers CIOs, IT departments, and PMOs with the latest in IT project and portfolio reporting, tracking and execution tools supporting IT Governance, demand management, and service delivery, Help Desk and Agile/SCRUM methodology. Tailored to your organization’s business processes, Genius Project provides complete visibility into your project and portfolio lifecycles from demand to successful delivery.
Professional Services

The right tools save time and who doesn’t need more time?

With the increasing number of Professional Services organizations across industries, companies need to differentiate themselves from the competition and surpass customer expectations in order to ensure profitability. Like no other type of organization, professional services companies have unique requirements centered on leveraging the experience and knowledge of their resources; as well as building, cultivating and maintaining strong client relationships.

Genius Project tailored for professional services organizations delivers an end-to-end solution managing all aspects of professional services automation; from project initiation to getting paid. Mapped to your business’ processes, professional services organizations can rest assured that when using Genius Project, their staff can focus on mission critical activities by delivering complete visibility into all project details and issues, effectively managing projects and resources, and providing powerful time and billing functionality that facilitates the highest quality service to clients.

Customer Relationship Management

- Provides a global view of customer status
- Offers customer collaboration capabilities
- Includes opportunities, project statuses and customer history updates
What Makes Us Different?

Complete, customizable and reliable

When your company chooses Genius Project, you are not simply choosing our experience and expertise, you are choosing a solution that conforms to and supports your processes and that will support you throughout your growth and development.

Top 5 reasons why you should choose Genius Project as your project and portfolio management solution:

- Over the past 15 years we have acquired extensive expertise in project management through working with our many customers across a large variety of different industries
- Our software is built by project managers for project managers
- We listened to your needs and have adapted our software to fit them
- We are the best price–for-value solution on the market
- Genius Project will evolve with your company. It can address your basic project management needs and grow with you as your requirements change

Top 5 features that makes us different

- Genius Planner: the best online Gantt Chart available and the only one that can compete with MS project
- Workflow: Ability to design a unique workflow for all types of information to ensure consistency and compliance with implemented processes
- Flexibility: Genius Project is designed to support all kinds of set up requirements such as different document names and types, workload units (hours or days), currencies, groups, etc.
- Social collaboration: Genius Live! is Genius Project’s social collaboration platform that takes enterprise project and portfolio management to the next level.
- Genius Live! will empower your users by delivering a collaboration platform that will introduce powerful social media capabilities familiar to today’s information worker
- Document management: Stop wasting time searching for documents, Genius Project provides a central repository for all of your project related documents that is available to your entire project team. It supports the attachment of all file types and allows you to edit any attachment directly in Genius Project to ensure that everyone has access to the same and most up to date versions
Integration between software applications is a powerful and effective way to streamline the collection of data across entire organizations and eliminate redundant and duplicate data entry into multiple different applications.

Our ease of integration with a variety of different software applications means that the setup and implementation processes will be shorter, resulting in quicker user access. The final result is lower acquisition costs and better ROI. Genius Project can integrate seamlessly with a large list of existing enterprise applications, such as SAP, People Soft, Oracle and many others. Genius Project also provides integration with enterprise portals, CRM systems, help desk and others.

Genius Project supports MS project integration to let you use your existing planning tool while taking advantage of our collaborative platform.
About Cerri.com

Cerri.com, formerly known as Genius Inside, was founded in 1997 to address a need for project management software for the IBM Lotus Notes market. The company’s flagship product, Genius Project, has been offered as an on-demand solution since April 2008 and hosted on-premise since 2010. With offices in Europe and North America and the support of network resellers worldwide, Genius Project now has over 93,000 end users and over 1,050 customers worldwide.

Cerri.com not only provides powerful project management solutions, it also offers expertise in project management best practices.

Dedicated to excellence, Cerri.com’s mission is to make project managers’ lives easier by improving project selection, planning, staffing, execution and tracking with easy-to-use and powerful project management solutions.
Whatever your platform, we have a solution

### On-Demand

The perfect solution for any organization that requires a solution with no large upfront investments costs.

SaaS (on-demand)
Yearly subscription fee that includes online support, updates and upgrades
Accessible via any web-browser
Cerri.com sets up and maintains the system

### On-Premise

The most secure solution for companies that would like to have their data on their own server with access via Internet.

Hosted on-premise (on your own server)
Accessible via any web-browser
Upfront payment plus yearly maintenance that includes online support, updates and upgrades
Cerri.com sets up the system but you maintain it

### Lotus Notes

Genius Project for Domino is the ideal solution for any organization that is using a Lotus Notes client.

In-house on a Lotus Domino Server
Upfront payment plus yearly maintenance that includes online support, updates and upgrades
Accessible on desktop with Lotus Notes database and via any web-browser (with the web server)
You set up the system and install the upgrades (updates)