

# Project Manager

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## Microsoft Enterprise Project Management 2007

It has been four years since MS Project 2003 hit the streets and now there is a new version on the block. So what has changed? **Steve Cotterell** takes an inside look at Microsoft's latest offerings.

The first thing to understand is that Microsoft Enterprise Project Management (EPM) 2007 is a combination of Microsoft products. Project managers and planners will use MS Office Project Professional, while executives, resource managers and team members will use MS Office Project Web Access. The central database of projects is held by MS Office Project Server, which uses Windows Server 2003, Microsoft SQL Server 2005 and SharePoint Services 3.0.

The Project Server concept is a set of five shared databases of projects. Database one holds resource information, project plans, standards and configuration details. MS Project 2007 accesses this information, as well as using a local C: drive, and data is cached to minimise time delays. Each change to data is stored in order in the cache and is invisible to the user. The second database stores information that the project manager deliberately publishes into it as a result of the reporting cycle. This means that the data held in database one can be kept confidential with public access only to 'published' database two.

The third holds a copy of the second database which is optimised for reporting purposes – for speed, and ease of access. It uses SQL Analysis Services creating OLAP cubes and formatting data for reporting purposes. The fourth is an archive. It can be used to restore a project if, for example, the data is lost while it's checked out. It can also hold historical archives. Databases two to four are used by Project Web Access. If 'Proposals and Activities' plans are used (more on them later) then PWA will use database one.

Microsoft's Enterprise Project Management system offers planning, scheduling, resource management and document management features, along with close integration to MS Office products.

The fifth is used by Windows SharePoint Services. It holds copies of documents, issues, risks, deliverables and is used for the creation of project websites.

As you'd expect of a system that has been three years in development, there are changes and improvements. For example, in MS Project, if any piece of data (such as duration) is changed, then all those tasks that contain data affected by the change are highlighted.

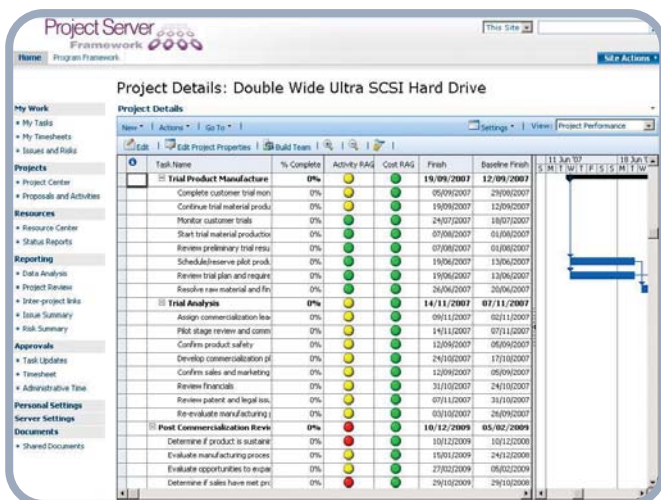
Multi-level undo now enables you to revert as far as the last time the file was saved.

If you click on the 'Task Drivers' function and highlight a task, the 'Task Drivers' window on the left of the screen gives details of the highlighted task and the driving predecessor(s) with details of their resources and any constraints. By clicking on the predecessor in this window you can step back through the plan.

There is also a new 'cost' resource type which enables you to track resource costs against budgets.

The file name suffixes are \*.mp for files that are used both by the server and local machines and \*.mpp files which can only be used on local machines. As a result, \*.mp files must be saved as \*.mpp files if they are to be sent outside the server system.

There are many other improvements and changes and you can read about them in more detail in the 'Project User Plus' supplement, sponsored by Corporate Project Solutions (CPS), which was in the March issue of PMT.



The Project Performance Task view

### Getting started

Microsoft say that most of their EPM customers require the services of a Microsoft Partner to install and configure their system, as well as providing other value-added services. There are a number of such partners in the UK, including CPS and Program Framework.

I was invited by Program Framework (PF) to look at EPM 2007 via their 'out of the box' configuration of EPM that they say allows 80% of their clients to start working without a major implementation process. So the review that follows is of the MS product set but within the PF framework.

Their Project Server Framework (PSF) sits alongside a conventional range of services including installation, customisation to clients' requirements, hosting, training and mentoring and support.

Log into PSF's out-of-the-box configuration of Project Web Access (PWA) and you enter your home page. On the left is the navigation menu. In the main screen area are lists of reminders (tasks, timesheets, approvals, issues and risks, etc.) and Project Workspaces. A click on any list item takes you into that work area.



*The Resource Availability chart*

### At the centre

At the heart of everything is the 'Project Centre'. This lists the projects in your database (one per line) via a number of pre-configured views, some of which have been added to the product by PF.

The underlying security model can be configured so that you can only see and do those things that you're allowed to – based on your authority and your need to know.

If you click on a particular project's name and select 'Project Properties' you see a list of the fields and drop-down lists that are used throughout the system when describing projects. In this area you can personalise the fields and lists. For example, 'current status' can be defined with the values that your organisation uses, which are then used as the defaults. These fields are used to drive the Project Centre views that can be built and configured to your organisation's needs.

Project Centre views can be used as executive dashboards to show the current schedule, spend or other status of the project, with RAG traffic light symbols showing their state. There is no workflow system built in, so if you use methods like PRINCE2, they have to be managed manually.

However, I understand that the next version of MS EPM, due in 2009, will provide a workflow management system.

Clicking on the name of a project can also take you to the project schedule – a task view similar to that seen in MS Project. Again, there's a pre-configured set of views that's been extended by PF, who've added about ten and more can be added at installation, if required. For example, 'Out of Condition Tasks' showing the cost and task completion status as RAG traffic light indicators. The values used for RAG indicators can be standardised across the organisation.

### Looking out for resources

In the Resource Centre you can see a list of your individual resources, organised into a Resource Breakdown Structure (RBS) and each with their own set of primary and secondary skills. The skill list can be configured to customer requirements. The RBS can be geographic or can mirror your organisation tree and can be used to drive security.

You can also define generic resources – generic skills or roles that have skills profiles. At an early stage of the project you might do your resource planning at this higher level.

You can highlight a project in Project Centre, select 'Edit' and launch MS Project (provided you have it on your machine).

To create a new project you can use a template (PF can set up templates for your organisation). Templates are held within Project Server and can also be defined by the system administrator.

You can select and edit a template or create a new project from scratch. Once you've defined the tasks, you use a 'Build Team from Enterprise' function to reserve a team of people who'll work on the project, without yet assigning them to tasks. This can be done at generic or individual level. You can filter the resource list so that just the generic resources are shown. You select the skills that you want and the quantity of those skills. Having built your generic team, you can then assign these generic skills to

the tasks in your project. You can save the project, but it won't be visible to other users until you 'publish' it – when it becomes visible in PWA (to those with the rights to see it).

Projects are frequently published and re-published according to a reporting cycle. What people see is the position of the project at the last published date. You can force publication of a project each time it's saved. You can also select the ability to store different versions of a project (this is apart from the capability of storing multiple (11) baselines of a project) but if you used this to overwrite live project data with the results of, say, what-if experimentation, you'd run the risk of losing changes made to the live project in the meantime.

When you publish a project, the job is placed in a queue (which can be monitored from within the project) to release the system to continue working. In the hosted environment (more about this later) this worked, but the review system, which ran on Program Framework's internal server, was having problems with these saves, which were failing due to a configuration error. Microsoft know about the problem and are developing a fix.

If the resource manager is not also the project manager, once the project manager has assigned generic resources, the resource manager can use PWA to assign individuals to tasks – without needing MS Project. Having selected the project in Project Centre, they select the 'Build Team' option. They can see a list of all the resources available and another of the resources assigned to the project. By highlighting an assigned generic resource in the second list, and hitting a 'Match' button, the list of available resources is filtered to show only those people with the required skill. These can then be selected and assigned. You can select an individual's name and hit a 'View Availability' button that produces a chart indicating their work status. This chart can be used to show the availability of one or more individuals, a team (or teams) or any combination, and the resources can then be assigned immediately.

However, a team is regarded as a single entity with no account taken of how many people are in the team or of their individual assignments. This means that you can assign a task to a team whose individual members are already fully booked and you will not get a warning of what you've done. Although resource levelling can be carried out automatically it's still recommended that you do this manually.

### Digging into the data

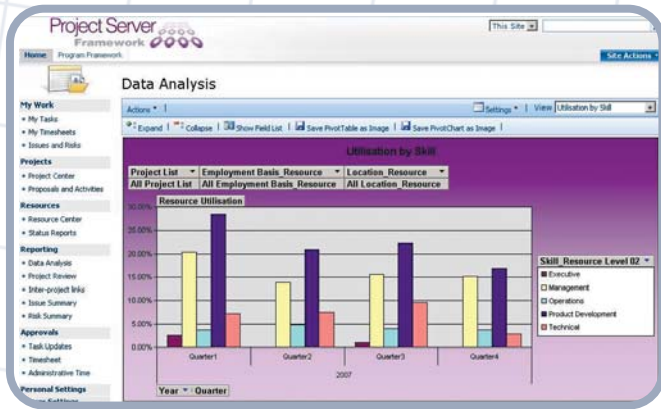
Project Server provides data analysis functionality via the 'Project Reporting Centre', a flexible data warehouse reporting system that can be used to build reports by choosing filters, selecting data and dragging and dropping it on to the report. A nice feature is that you can point at a bar on a report and a little 'screen tip' box opens to display the data that the bar illustrates.

PF has created a report that pulls key performance indicators such as actuals versus forecast work and cost, milestones, risks and issues on a project-by-project basis and which is useful as a regular Board-level report.

Project Web Access's (PWA) 'Proposals and Activities' functionality has been added to allow the creation of lightweight projects, avoiding the need for unnecessary MS Project licences.

You complete the basic project description information (later it can be converted into a true project) and then enter the set of tasks. An Activity is similar, but whereas Proposals have a status field to be completed, Activities don't. An Activity isn't used to start a new project, but possibly to manage some support activities to be done.

PF has added about seventeen pre-configured views to MS Project, which assist in developing and updating the schedule. Some views are available in both Project Server and PWA. When I looked at these in the hosted environment they worked fine, but the internal server configuration error (mentioned previously) prevented the 'Develop Schedule' view from



A report produced using the system's data analysis functionality

working properly on the review system.

PWA makes timesheets available to your organisation. You click on a period in the 'My Timesheets' list to create a timesheet for that period. All the tasks that you are assigned to appear, as well as slots for administrative time. Timesheets can be configured to collect percentage complete and remaining duration figures against tasks. Timesheets can also be used to collect percentage complete, actuals by day, or actuals by time period, and allow the user to input remaining effort against tasks. Manual management of the timesheet cycle is required. Timesheets don't update the project until they have been approved by the project manager and the project re-published. PF personalises the appearance of timesheets for their clients.

Risks and issue logs are available and will also be personalised for the client. Both risks and issues can be associated with tasks and can be assigned to team members.

Also provided is a list of project deliverables, which can be defined as external links which other projects can see and base dependencies on. Any delays to the deliverables are merely reported on – they don't cause changes to the schedule of the dependant project – which is what happens now when hard links between projects are used.

Project Workspaces provide common areas for project teams. You can upload documents to be shared, with the usual document management functions available – check out and in, maintenance history, and so on. PF will do some personalisation of the folder structure in the document storage area. Documents can be linked to tasks causing an icon to show against the tasks when listed. In this area you can also have discussion groups, contact lists, meeting announcements and agenda publication and team calendars.

Outlook can be integrated with PWA so that information can be synchronised between the two applications and PWA objects (such as documents) can be accessed via Outlook. The PWA calendar data can be duplicated in the Outlook calendar.

### Web access

PF's 'thin client' Citrix-based hosted environment (which can run in most desktop situations, including securely locked-down systems) is provided by Aenigma. You connect to it via Internet Explorer 6 and later, with a username and password.

The first time you log on, you download the Citrix client which is automatically configured and is invisible thereafter. You don't need administrator rights on the machine to install and use the system. It is ideal for temporary programmes of projects, with a transient, widely dispersed user base. A 'third-party' environment can be created for extranet users.

PWA runs in a window and is almost the same as that which runs on an organisation's own Web server. The main difference is that, when downloading data from the system, this can only be saved to your PCs C:

drive because the system can't see any network drives that you may have. Clicking on the name of a project opens it in MS Project in the same way – provided that you have the rights (and the right access agreement). Microsoft tell me that, if the project management side of their business was to be separated from the main company, and set up a business in its own light, it would be one of the largest software companies in the world. Sales of Project Server are steadily increasing. I have seen nothing in this review to suggest that these trends won't continue.

## Right to reply

With Microsoft Office Project 2007 family we aligned around four, core focus areas which were driven by our customers and an inherent aim to be the technology enabler behind project management. Steve has mentioned many of these areas – from both a client perspective with Microsoft Office Project Standard through to our EPM Solution offering.

The one key point that I would like to reinforce is that the Microsoft Office EPM Solution is now an end-to-end collaborative project and portfolio management environment that helps our customers gain visibility, insight, and control by enhancing decision making, improving alignment with the business strategy, maximizing resource utilization as well as measuring and increasing operational efficiency.

When speaking to customers the repeated required functionality is that the EPM Solution offers effective communication and collaboration within project teams. With the dramatic increase of multi-site and global projects – the technology required to assist, drive and enable the project manager has needed to adapt. Project collaboration is critical and the Microsoft Office Enterprise Management Solution now delivers this.

Howard Lewis

Microsoft Office Project Product Manager, Microsoft UK

### What does it cost?

For a typical team size of 25, including five project managers and 20 resources, including installation, personalisation, training, mentoring and a support budget, the prices (excluding VAT) are:

A client internal installation of Project Server Framework would cost about £25,000 excluding hardware and Microsoft software licences (ie, Project Server, Project Professional and Project Web Access licences are extra, plus potentially SQL server and Windows Server licences. The actual price depends on existing client licences and any pricing agreements with Microsoft).

A hosted system would cost £25,000, plus an estimated monthly cost of £1,495 for hosting and licence fees (licensing is independent from any existing conditions and is based on a 'pay per use' model).

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