Improve Project Team Collaboration Using Microsoft Project Online

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…Discipline! That’s the thing.

“It was then I received the Victoria Cross for bravery, above and beyond the call of duty. Ha-ha! Those were the days! Discipline! Discipline was the thing; builds character and all that sort of thing.”

Colonel Hathi, Jungle Book
Agenda

The Journey –

• Background
• Vision, Objectives & Requirements
• Why Microsoft Project Online
• Implementation Plan
• How to Improve Team Collaboration with Project Online
• Benefits Summary
• Lessons Learned

Sometimes it’s the journey that teaches you a lot about your destination.

Drake
Infor

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Specialties:

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Background

- Expanding rapidly through acquisition
- Challenged by integrating disparate organizations, people, processes and tools
- Challenged by managing growth in consulting services
- Executive management funds a global Project Management Office (PMO) in 2012
- A group of 6 people embark on a journey to build a world-class PMO and build common tools, methods and practices to bring order to the rapid growth
Vision of the Global PMO

Review projects and bids for compliance with policies, procedures and quality standards

Improve the capabilities, maturity and effectiveness of project management and project delivery

Engage in pre-sales activities, project start-ups, remediation, project team training and other delivery efforts
Vision – Implement PMO Capabilities Over 3+ Years

**PMO Maturity Level**

<table>
<thead>
<tr>
<th>Level 1 Initial</th>
<th>Level 2 Managed</th>
<th>Level 3 Defined</th>
<th>Level 4 Quantitatively Managed</th>
<th>Level 5 Optimizing</th>
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- **Processes are unpredictable, poorly controlled and reactive; ad hoc**
- **Basic processes and templates are built for projects; often reactive**
- **Methods, processes and tools are built for the organization; proactive, repeatable**
- **Methods, processes and tools are institutionalized; measured and controlled**

**Focus on quality, continuous process improvement and optimization**

Objectives & Requirements

Objectives:
• Implement a Project & Portfolio Management System for Consulting Services (CS) global operations
• Develop common set of business processes and industry best practices to govern CS project and portfolio management

System Context:
• PPM tool in center, people and system actors on either side describing information flow and use cases

Requirements:
• UC001 – Create New Project
• UC002 – Guide Project Delivery
• UC003 – Account for Project Financials
• UC004 – Capture Time & Expenses
• UC005 – Manage Client Billing & AR
• UC006 – Report on Project Status
• UC007 – Forecast & Schedule Resources
• UC008 – Manage Project Documentation
• UC009 – Communicate via Email
• UC010 – Manage Project Work
• UC011 – Manage Project Schedule
• UC012 – Manage Work Assignments
• UC013 – Manage Work Products
• UC014 – Collaborate with Project Team
• UC015 – Manage Project Issues/Risks
• UC016 – Manage Project Staff
• UC017 – Manage Project Content
• UC018 – Manage Project Status
• UC019 – Manage PPM System
• UC020 – Create Project WBS
Business & System Requirements

1. Prioritize detailed requirements in a MoSCoW list

2. Support requirements with business process models

3. Elaborate requirement details in use cases that define the best practice
Why Microsoft Project Online?

1. It meets the majority of our requirements

2. The approach is simple – add ‘Project Online’ to our existing Microsoft O365 footprint

More important…

3. It is the right tool to promote disciplined team behavior, information transparency and accountability
What is Project Online?

Project Online utilizes standard Microsoft products for Project Management: Project Pro on the desktop, and Project Server and SharePoint in Microsoft’s Office 365 Cloud.

**Microsoft SharePoint**
- Document Repository
- Issue/Risk Management
- Team Collaboration

**Microsoft Project Server – Project Web App (PWA)**
- Schedule Management
- Work Management
- Progress Reporting

**Microsoft Project Pro**
- Build & Maintain a Project Schedule

SharePoint is a secure place to store, organize, share, and access information from almost any device.

Microsoft Office 365 provides anywhere access to your project schedule, team, events, issues and risks.

Project Pro is a desktop application that builds and maintains Project Schedules.

Project Server is a project management solution that manages project schedules and tasks with an interface to Microsoft Project Pro and SharePoint.
Project Online Implementation Plan & Timeline

**Develop PMO Tools Roadmap**
6/1/2013 - 8/31/2013

**Define PPM Requirements**
6/1/2013 - 7/31/2013

**Evaluate & Select PPM Tool Candidates**
8/1/2013 - 12/31/2013

**Design, Configure and Test PPM Tool**
1/1/2014 - 6/30/2014

**Develop PPM Processes**
1/1/2014 - 6/30/2014

**Conduct Pilot**
7/1/2014 - 10/31/2014

**Manage Early-adopter Release**
11/1/2014 - 12/31/2014

**Design and Implement Global Support Model**
11/1/2014 - 12/31/2014

**Monitor & Control PPM Tool Usage, Optimize**
11/1/2014 - 12/31/2014

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**Go-live #1 - Pilot**
7/1/2014

**Selected Microsoft Project Online**
12/31/2013

**PPM Requirements Complete**
8/31/2013

**Jun 2013**

**Sep 2013**

**Dec 2013**

**2014**

**Jun 2014**

**Sep 2014**

**Dec 2014**

**2015**

**Dec 2015**

**2016**

**Go-live #2 - Early Adopter**
11/1/2014

**Go-live #3 - General Release**
12/31/2014

**Design, Configure and Test Complete**
6/30/2014
Global System and Business Process Design

- **Global Process Design**: 4 senior PMs, 6 months. Develop system & process designs.
- **Pre-Production Pilot**: 8 projects, 4 months. Refine system & process designs.
- **Early Adopter Release**: Grow to 50 projects. Develop training & support programs.

Timeframe:
- **Design, Configure and Test PPM Tool**: 1/1/2014 - 6/30/2014
- **Develop PPM Processes**: 1/1/2014 - 6/30/2014
- **Conduct Pilot**: 7/1/2014 - 10/31/2014
- **Manage Early-adopter Release**: 11/1/2014 - 12/31/2014
- **Design and Implement Global Support Model**: 11/1/2014 - 12/31/2014
Global User Training & Support

1. User training content
   • Getting Started Guide
   • Recorded Training
   • Live Training for project startups
   • Job Aids

2. Tips & Tricks page

3. Email address for support

4. Automated project site and user account setup process & password reset
Global User Training & Support
How to Improve Team Collaboration Using Microsoft Project Online?

1. Build an effective project schedule in Microsoft Project
2. Enable performance metrics for status reporting
3. Publish and maintain the schedule in PWA (Project Server), synchronizing the task list with SharePoint
4. Manage the task list in PWA
5. Manage issues, risks, deliverables, tasks in SharePoint
6. Manage team collaboration in SharePoint
7. Manage individual resource calendars and time off
8. Manage project status reporting in PWA
9. Manage portfolio reporting in PWA
10. Also, may I suggest a marching song for your team

Hup, 2, 3, 4
Keep it up, 2, 3, 4
Company, sound off!
Steps to Build a Project Schedule in MS Project

1. Work Breakdown Structure (WBS)
   - Level 1: Project Name
   - Level 2: Phase/Track Name
   - Level 3: DELIVERABLE
   - Level 4: Major Activity
   - Level 5: Sub Task
   - Move work to the lowest level where it is budgeted, assigned and managed.

2. Elaborate Tasks
   - The WBS and task list should tell a story
   - Label tasks with clear verb-noun descriptions
   - Choose the appropriate Task Type (fixed work, duration or units)

3. Enter Task Durations
   - Enter work or duration estimates, not both, depending on task type
   - Enter durations between 40 and 80 hours per task

4. Enter Dependencies
   - Add a predecessor / successor to tasks to make entire schedule closed-looped – for dynamic scheduling

5. Enter Resource Assignments

6. Enter Constraints / Deadlines

7. Optimize Plan

8. Maintain Plan

9. Report on Progress/Status
Steps to Build a Project Schedule in MS Project

5. Enter Resource Assignments
   • Assign resources to bottom level tasks, as few resources per task as possible
   • Level resources

6. Enter Constraints or Deadlines
   • Enter constraints only where necessary to set start / finish dates
   • Consider using a deadline instead

7. Optimize Plan
   • Show the critical path and optimize for time resources and cost

8. Maintain Plan
   • BASELINE the schedule
   • Update task status regularly
   • % Complete
   • Remaining work / duration
   • Actual work / duration

9. Report on Progress / Status
   • Show Late Tasks filter
   • Show % Complete
   • Show Status indicator
   • Show progress in Baseline view and/or against deadlines
   • Show progress in Project Statistics

10. Enable performance metrics for status reporting
    • BASELINE the schedule
    • Set Std. Rate on all resources
    • Use Earned Value metrics (SPI & CPI)
    • Develop and set R/Y/G Status/Health indicators at the task and project level
    • Develop project and/or task budgets for hours and cost

Enable performance metrics for status reporting

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Publish Project Schedule in PWA (Project Server)

1. PMs manage the schedule online via PWA

2. PMs must maintain and “Publish” the schedule in Microsoft Project Pro to publish changes and update task lists in PWA and synchronize the SharePoint task list.
Publish Project Schedule in PWA (Project Server)
Manage the Task List in PWA

1. Resource assignments in the schedule will be converted to individual tasks lists in PWA

2. Task owners can locate, track and update individual tasks in their Task list
Manage Project Events in SharePoint

Project events are defined as:

- Issues
- Actions
- Risks
- Change Requests
- Key Decisions
- Deliverables
Manage Issues & Actions

- **Issues** are situations, actions, decisions or other elements that exist and must be addressed within a certain timeframe.
- **Actions** are tasks or activities; things that must be performed or completed within a certain timeframe.
Manage Risks

• **Risks** are potential, future events that may threaten project performance

• Risks should be defined as the cause and effect and should have supporting detail –
Individual Issue and Risk List in PWA

- Issues and Risks assigned to an individual will be summarized in the “Issues and Risk” menu in PWA.
- Team members should regularly monitor and address their assigned Issues and Risks.
Manage Change Requests

- **Change Requests** are formal proposals to modify project scope, cost, schedule or other managed deliverable, work product or output.
Manage Key Decisions

- **Key Decisions** are formal decisions that must be made, or have been made, regarding system designs, business practices, policies or other matter that should be adequately documented.
Manage Deliverables

- **Deliverables** are contractual obligations to produce and deliver something meaningful: work product, artifact or outcome.
Manage Team Collaboration in SharePoint

Team Collaboration is defined as:

- Manage Documents
- Manage the Team Calendar
- Manage Team Contact List
- Manage the Notebook (OneNote application) for Meeting Minutes
Manage Documents

- Manage the Document Folder Structure
- Upload files or download files to PC for save or edit
- Sync files using O365 Office
- Open and edit document online or offline
Manage Calendar

- Form the Calendar menu, review the calendar items or click to add on a new entry by clicking on “add”.
Manage Contacts

• Form the Contact List menu, review the list of contacts or click + new announcement to create a new one.
Manage OneNote

• The OneNote feature is available in SharePoint for online and collaborative documentation of meeting minutes or other purposes
Manage Resource Calendars & Time Off

• Enter time against tasks and for non-productive time (e.g. admin and PTO) in Timesheet.
Manage Project Status Reporting in PWA

- Use the SharePoint Document Library to store status reports.
- Or use the “Status Report” feature in PWA to submit status report requests and responses online.
Manage Portfolio Reporting in PWA

- Use Project Center to present portfolio status and performance information:
  - Schedule health
  - Earned value
  - Other status information
Manage Portfolio Reporting in PWA

• Examples of Power BI portfolio reports
Benefits Summary

Effectively using Microsoft Project Online—combining the power and flexibility of SharePoint, Project Server and Project Pro—along with disciplined leadership and best practices for:

A- • Document Management
B • Event Management (issues, risks, changes, key decisions, etc.)
B+ • Team Collaboration
B- • Schedule and Work Management
C+ • Project and Portfolio Progress Reporting

• Results in:
  • Disciplined team behavior, information transparency and accountability
  • Anywhere access to manage your project schedule, team, events, issues, risks and deliverables
  • Anywhere access to project and portfolio status reporting
  • World-class PMO and project management capabilities
  • Standard, repeatable and predictable project management practices
Lessons Learned

• Acquire adequate executive support
• Develop clear processes, practices, training material and training program
• Develop adequate PM skills in Microsoft Project fundamentals
• Address the steep learning curve for casual users
• Deploy an effective and scalable user support structure
• Consider the significant amount of work in user account setup – license all users under an enterprise agreement, if possible
• Design and deploy BI dashboards and standard reports and present regular progress reports that demonstrate the desired behaviors
• Stick with standard functionality and limit use of personalization
About the Presenter:

Steven Vowles has been actively designing, developing, and implementing ERP applications for more than 20 years as technical consultant and project manager at companies like Oracle, CIBER and Infor. He is uniquely positioned to provide insights and perspective into IT Project Management best practices, risks, and success factors, Steven is an expert in IT project governance, quality management, risk management, and implementation methods, delivering simple, creative, and often radical perspectives that will open doors and minds.

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