

The Microsoft EPM Solution: Blending Tools to Create an Automated Project Management Environment

by John White

The enterprise project management business process encompasses project, program, and portfolio management. Program and project managers concentrate on *doing the work correctly*, while portfolio managers concentrate on *doing the correct work*. Project and program managers get the work accomplished on time and within budget to the satisfaction of their stakeholders. Portfolio managers help organizational decision makers select, categorize, prioritize, and control all work across the enterprise. They work to enhance strategic decision making, align projects and programs with the organization's business strategy, maximize enterprise resource utilization and capacity, and monitor the organization's operational efficiency.

Effective performance and governance of these objectives relies heavily on the integration of people, processes, and tools. Using an integrated tool set, such as the Microsoft® Office Enterprise Project Management (EPM) Solution, can automate the EPM process. Project, program, and portfolio managers can manage and control all types of work within a portfolio of projects across the enterprise, improve the visibility of portfolio projects, and promote effective collaboration and communication with all stakeholders and among project team members.

The Microsoft Office EPM Solution is comprised of:

- The robust database features of Microsoft Office Project Server 2007.
- The full array of powerful project management tools for scheduling and controlling projects in Microsoft Office Project Professional 2007.
- The rich set of browser-based collaboration and document management features of Microsoft Office Project Web Access that is built on top of Microsoft® Windows® SharePoint® Services.
- The business strategy governance and evaluation tools of Microsoft Office Project Portfolio Server 2007 that are visible through Microsoft Office Project Portfolio Web Access.

Collectively, they create an automated end-to-end project portfolio management solution.

Office Project Server 2007

To provide the automation features, Office Project Server 2007 integrates three important products:

- Office Project Professional 2007 – project and program management.
- Office Project Web Access – sharing and accessing information.
- Windows SharePoint Services – collaboration, communication, and document management.

Together, they contain the project schedules, resource pool data, and reporting capabilities required to automate the project management environment. Project and resource information are stored centrally in the Office Project Server database and use the Microsoft SQL Server database functionality. Organizations can effectively and consistently plan, control, analyze, and report on projects and resources, thereby enabling better strategic decisions and optimizing project and program performance.

Office Project Professional 2007

Office Project Professional 2007 provides features to plan and control work and information efficiently and to track and monitor schedules, costs, and resources. Project and program managers can initiate, plan, execute, monitor and control, and close all types of work to efficiently deliver and maximize the organization's return on investment through the projects and programs in a portfolio.

Here, project and program managers create and manage project schedules along with their dependencies, deadlines, and constraints. Tasks, calendars, costs, and resources and their assignments are more effectively managed, with greater insight and visibility across the enterprise. Project automates collaboration and communication among team members, across teams, and with stakeholders enterprise-wide. Coordination within and across teams enables users to view, update, and analyze project information.

Office Project Web Access

Office Project Web Access provides enterprise-wide access to information stored on Project Server 2007 about projects, resources, and costs and to Windows SharePoint Services collaboration features. The access and visibility features help team members work effectively together and enhance analysis and decision making through custom views and reports on all projects and programs in a portfolio.

Among its many features, Office Project Web Access components automate the following activities:

- **Project Center.** Manage and analyze real-time data. Objectively prioritize, optimize, and select projects that align with your organization's business strategy. Conduct earned value analysis and identify budget and schedule variances.
- **Resource Center.** Conduct analysis on resource allocation and availability. Predict resource costs and forecast resource capacity planning across the enterprise.
- **Timesheets.** Update project schedules and view the full impact of the updates on projects and programs in real-time. Keep teams aligned through task assignments and timesheet reporting.
- **Status Reports.** Gain transparency, visibility, and control of current status and potential problems across projects and programs.
- **Data Analysis.** Generate detailed or summary dynamic reports. View project, resource, task, assignment, schedule, progress, cost, and other information. Analyze information and create reports to display critical project or program information.

Windows SharePoint Services

Windows SharePoint Services provides the workspaces in Office Project Server 2007 through which team members and stakeholders keep informed and aligned. A communication plan that uses Windows SharePoint Services features, such as the following, automates collaboration, information sharing, and communication of project, program, and portfolio information.

- **Deliverables.** Allows easy access to project deliverables information. Deliverables need to be reviewed by the project team and may be subject to approval by the sponsor. Deliverables can be directly linked to a project by using Office Project Web Access. When team members and stakeholders want to see these deliverables, they can be viewed without the whole schedule.
- **Risks and Issues.** Provides visibility to potential risks and issues. They can be identified, tracked, updated, linked with tasks, assigned responsibility, and closed. They can be escalated to the appropriate person and assigned specific status, categories, and priorities, along with any mitigations or resolutions.
- **Documents.** Locates all project-related documents in one central repository for access as needed by the team members and stakeholders. Documents can be added, updated, viewed, searched, and archived, depending on permissions. You can assign a specific status to a document, and you can control document versions by using the check-in and check-out process.

Office Project Portfolio Server 2007

Office Project Portfolio Server 2007 is part of the EPM Solution to provide top-down portfolio management with Office Project Server 2007. Configured with the Project Server Gateway – the bidirectional link between Project Portfolio Server and Project Server – Microsoft Office Project Portfolio Web Access provides senior executives, portfolio analysts, and program and project managers with access to the information stored on both servers. They can analyze, track, and monitor schedules, costs, and resources to keep a portfolio of projects and programs aligned with organizational strategic objectives.

You can use the following portfolio management features to stay better informed about a portfolio of projects:

- **Portfolio Builder.** Builds and consolidates your portfolio of projects within an enterprise portfolio repository. Standardizes data collection, applies enterprise-wide portfolio governance processes, and implements controls to help guarantee compliance with these governance processes.
- **Portfolio Dashboard.** Gives the organization a central location to evaluate, monitor, and control the performance of the portfolio of projects across all of their phases, ensuring that they are aligned with and benefit from the organization's strategic objectives.
- **Portfolio Optimizer.** Optimizes, prioritizes, and selects projects and programs that are aligned with strategic objectives by automatically implementing strategic, financial, and risk portfolio-priority levels. Charts and graphs can be created to visually assess opposing or competing portfolios aligned with the organization's business strategy.

The Microsoft Office EPM Solution blends project, program, and portfolio management tools and their functions. Organizations gain an effective and efficient automated project management environment in which they can align their portfolio of projects with the organization's overall strategic objectives and help to improve decision making across the enterprise.

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