

Enterprise Resource Management using MS Project Server 2007

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Project Assistants

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Objectives

To ensure you understand:

- Why should an organization Implement a Enterprise Resource Management solution?
- How to define Enterprise Resource Management
- How to use Microsoft Enterprise Resource Management features
- How to apply Microsoft ERM Tools to effectively manage resources



Why should an organization Implement a Enterprise Resource Management solution?

- Lack of visibility on current resource's demand and capacity.
- Not sure if you have the right resources work on the right initiatives
- Not sure if you have enough of the right skill sets and experience level.
- Lack of insight into resource utilization.



What is Enterprise Resource Management?

- The management of a pool of resources belonging to the whole organization
- Analyzing and/or selecting resources based on availability and type from a central source
- Making decisions on how to upgrade an enterprise resource pool based on its current makeup



Microsoft EPM Features

- How can a Microsoft Solution help with Enterprise Resource Management?
 - Defining Human Generic Resources
 - Defining Material Resources
 - Setting cost rates and resource calendars
 - Generic Skill Matching
 - Resource Availability Reporting

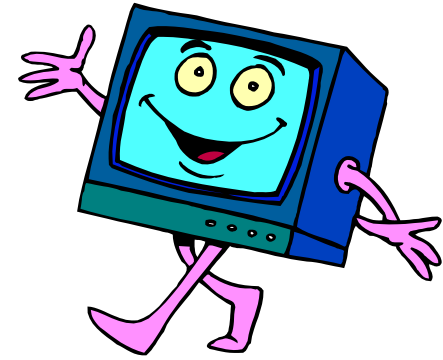
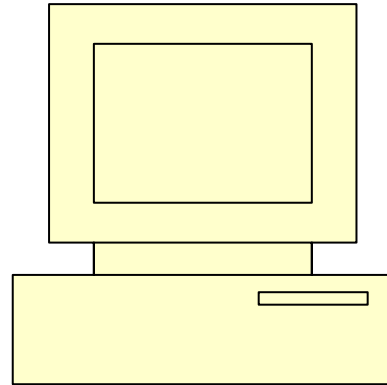


Defining Human Generic Resources



A generic resource defines the type of resource we need on our project. Skill sets, experience, etc...

Defining Material Resources



A material resource such as a test environment, a room, cables, PC's etc



Costs Rates

Resource Information

General **Costs** Notes Custom Fields

Resource Name:

Cost rate tables

For rates, enter a value or a percentage increase or decrease from the previous rate. For instance, if a resource's Per Use Cost is reduced by 20%, type -20%.

A (Default)	B	C	D	E
\$90.00/h				
Effective Date	Standard Rate	Overtime Rate	Per Use Cost	
--	\$90.00/h	\$0.00/h	\$0.00	
Mon 3/10/08	\$100.00/h	\$0.00/h	\$0.00	

Cost accrual:

Help Details... OK Cancel



Resource Calendars

Change Working Time

Resource calendar for 'Natalie Doe':

Base calendar: Standard

Legend:

- Working
- Nonworking
- Edited working hours

On this calendar:

- Exception day
- Nondefault work week

Click on a day to see its working times:

February 2008

S	M	T	W	Th	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	

February 4, 2008 is nonworking.

Based on:
Exception 'vacation time' on calendar 'Natalie Doe'.

Exceptions | Work Weeks

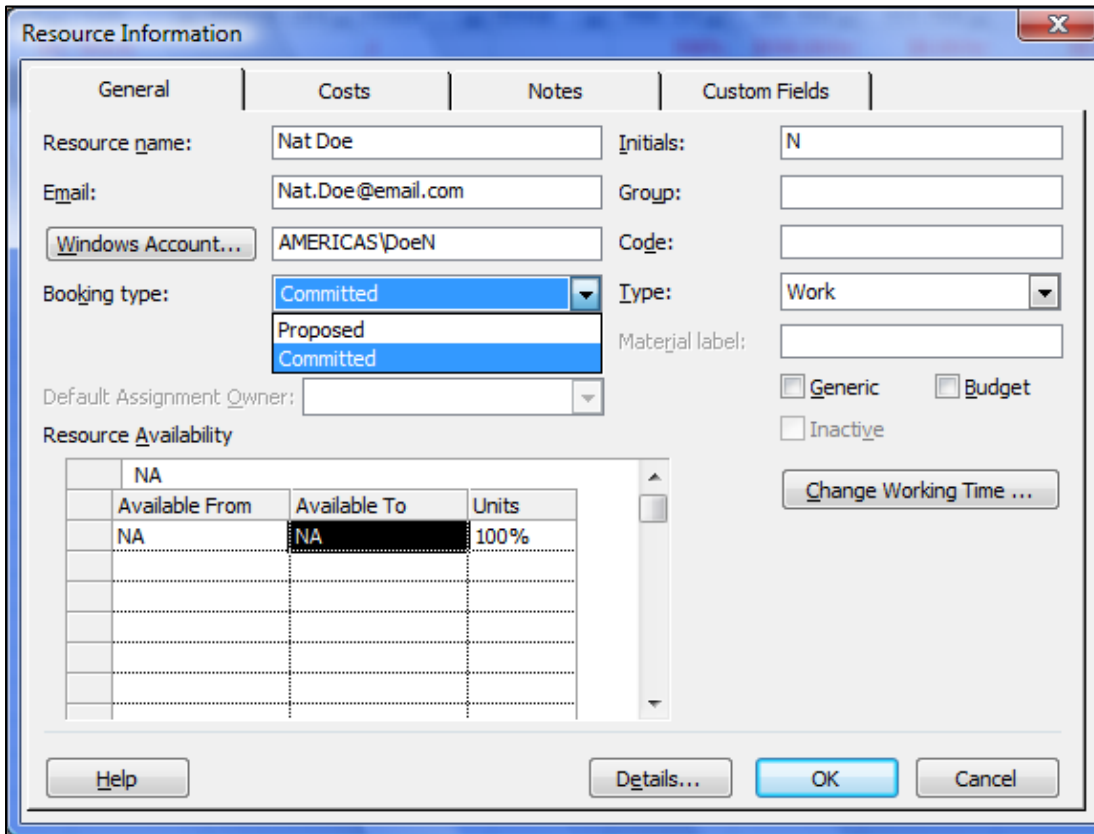
	Name	Start	Finish
1	Vacation time	2/4/2008	2/8/2008

Help OK Cancel

Details... Delete



Booking Types



The screenshot shows a 'Resource Information' dialog box with the following fields and options:

- Resource name: Nat Doe
- Email: Nat.Doe@email.com
- Windows Account: AMERICAS\DoeN
- Initials: N
- Group: (empty)
- Code: (empty)
- Booking type: **Committed** (selected), Proposed, Committed
- Type: Work
- Material label: (empty)
- Default Assignment Owner: (empty)
- Generic:
- Budget:
- Inactive:
- Change Working Time ...

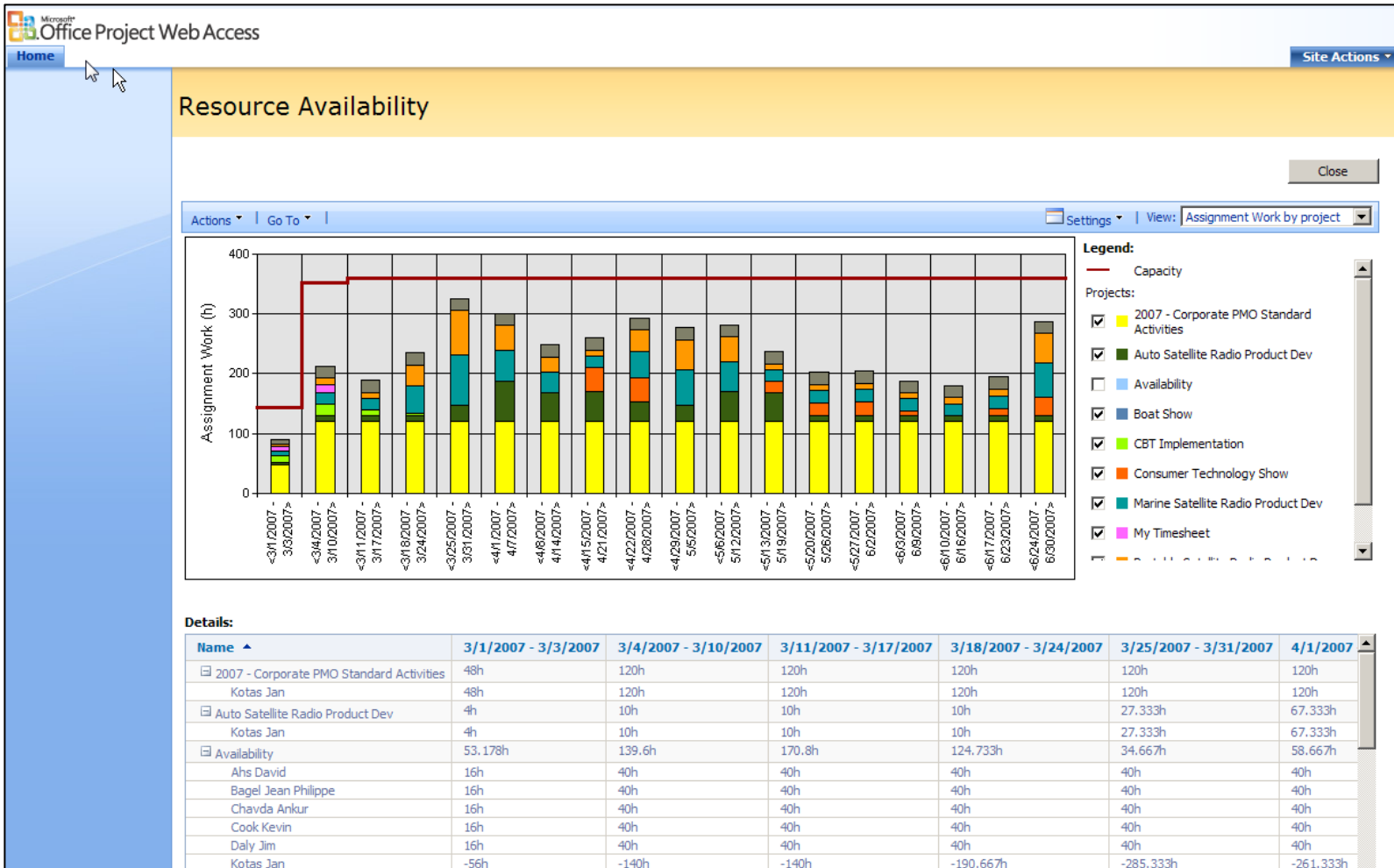
The 'Resource Availability' table is shown below:

NA	Available From	Available To	Units
NA		NA	100%

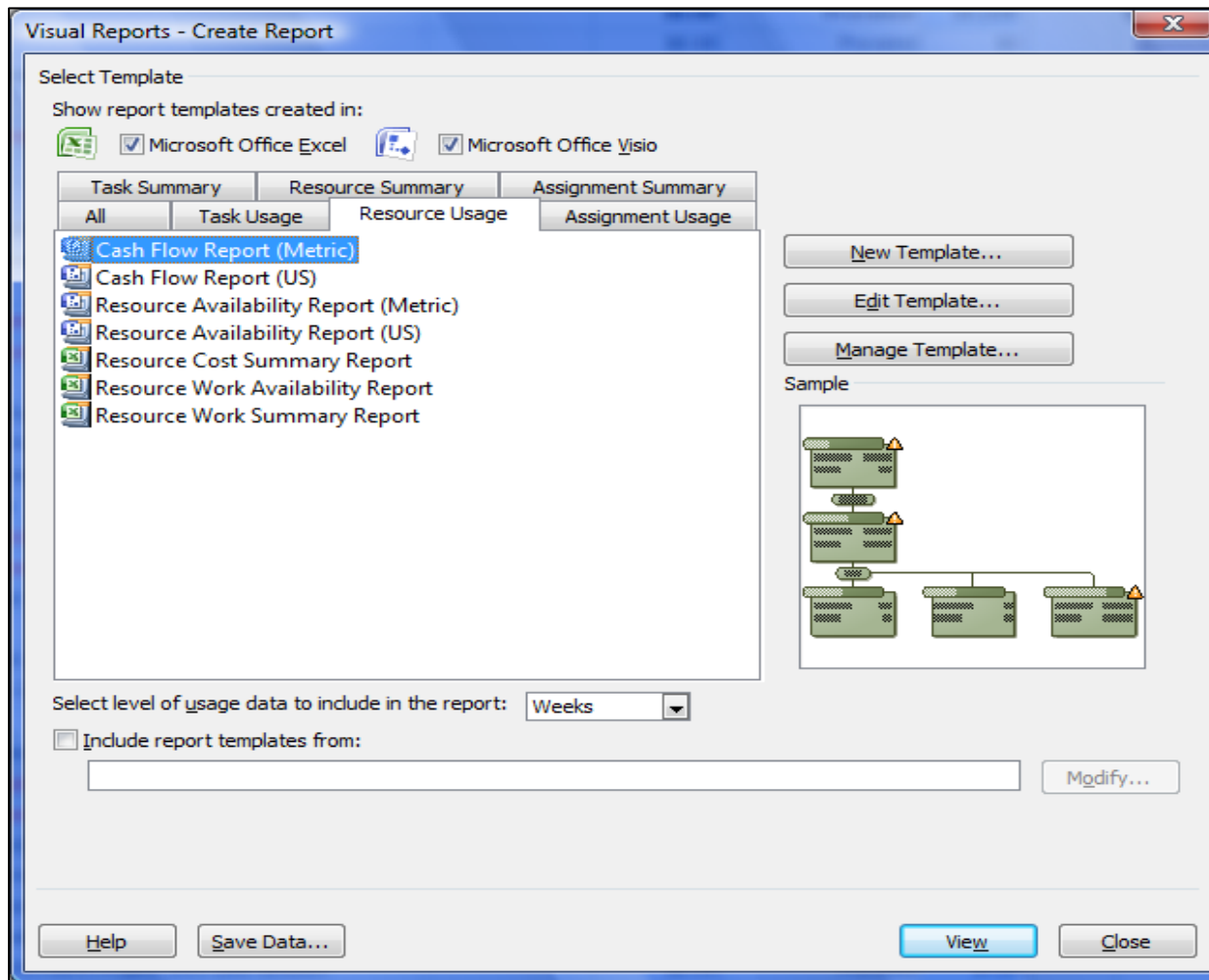
Proposed: Resource can still be booked to another project during a proposed time frame

Committed: Resource cannot be booked to another project during a committed time frame

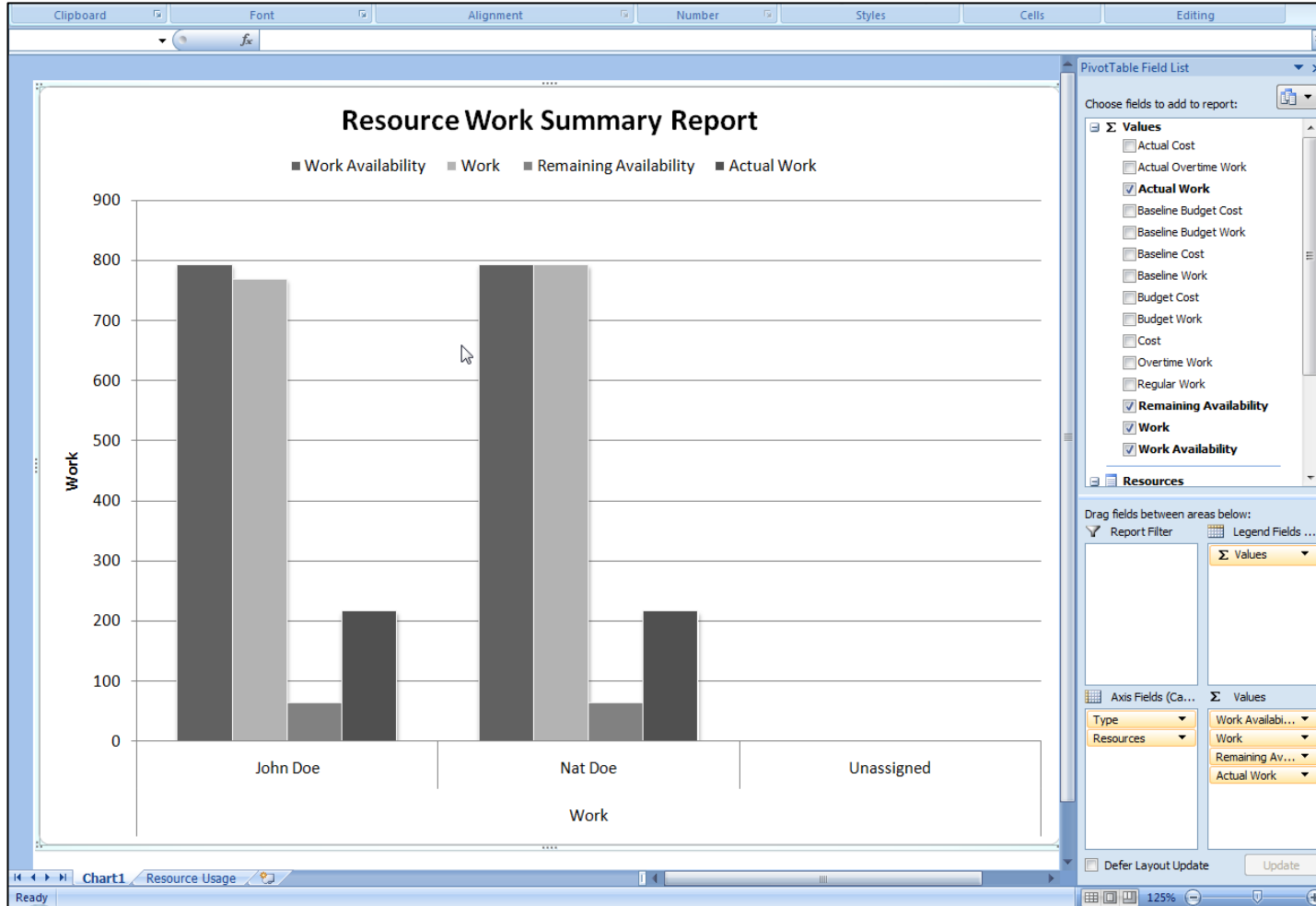
Resource Availability Reporting



Resource Visual Reports



Resource Work Summary Report



Additional Microsoft EPM Features

- Establishing resource control via Resource Breakdown Structure (RBS)
- Setting resource attributes with custom resource outline codes
- Resource re-deployment via portfolio models
- Work Contours
- Historical resource usage on projects



New Microsoft Resource Management Features

- Team Builder
 - Improved skills and resource searching
 - Create filtered views that are specific to Team Builder
 - Use filtering and searching when using Team Builder in Project Web Access
- Resource plans
 - Enables resource demand to be specified independent of project assignments
 - Supports start date, finish date, and units of resource allocated to a project
 - Allows project summary resource assignment to pull from the resource plan or project assignments
 - Resource plans are available in Project Server reports

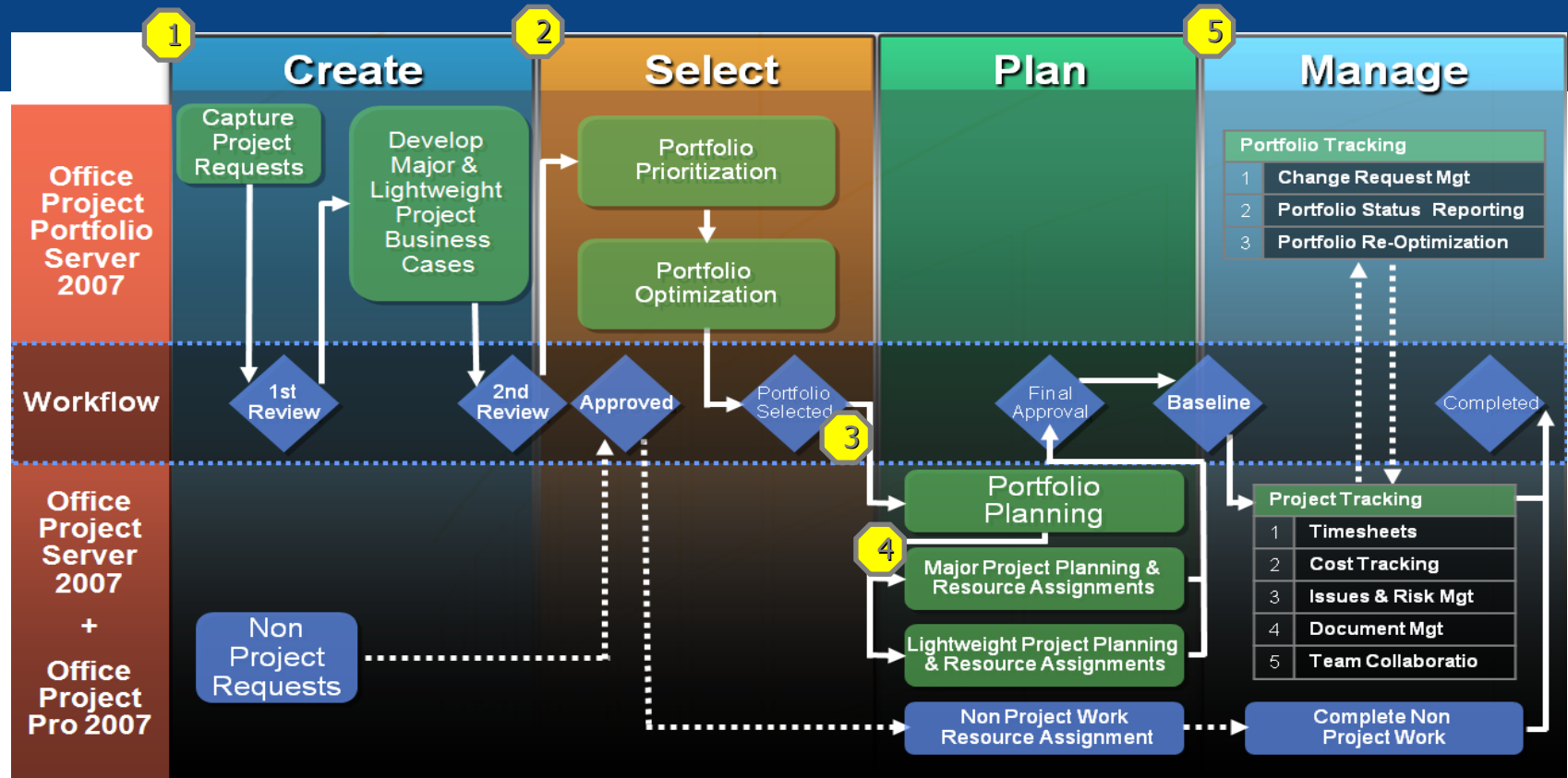


New Microsoft Resource Management Features (Cont)

- Team resources
 - Allows assignments to be published to a team
 - Team members can see and take ownership of assignments published to a team
 - Team capacity and demand can be viewed in Project Server 2007 reports
- Resource editing
 - Enterprise resources can be defined through Project Web Access or PSI
 - Supports availability, rate tables, custom fields, and standard fields



How to use Microsoft Enterprise Resource Management features



- 1 **Capture the project and resource request and build detailed business case. (Resource Plans)**
- 2 **Select the optimal project portfolio**
- 3 **Export selected projects to Project Server 2007**

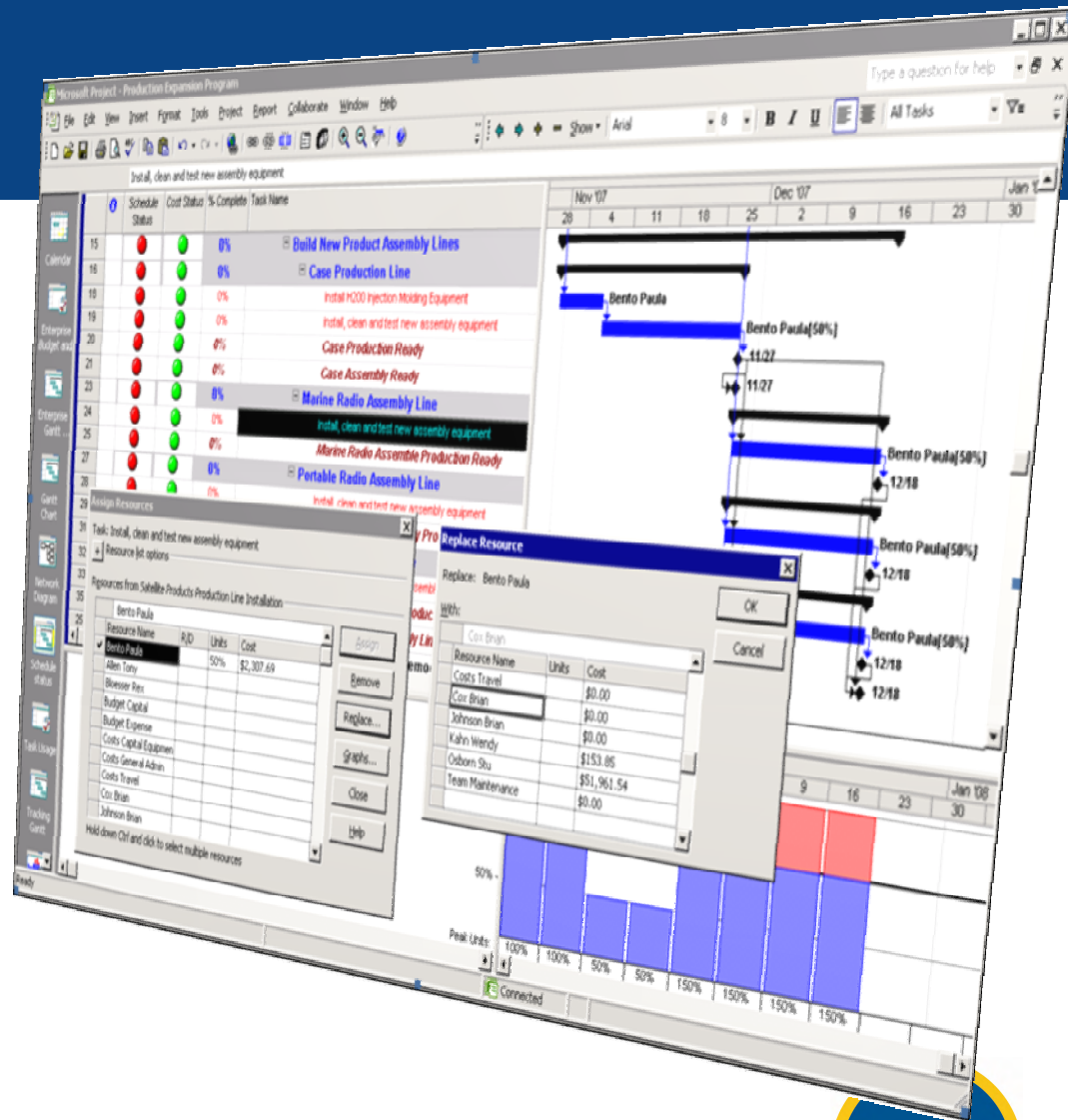
- 4 **Capacity analysis and detailed project and resource planning**
- 5 **Track and manage resources and the project to a successful conclusion**



Plan: Detailed Planning

Develop Detailed Project Plans

- Build the detailed project plan (e.g. detailed tasks, milestones etc.)
- Assign named / individual resources to the plan
- Capture inter project dependencies
- Finalize and baseline project plan
- Synchronize project level data with Office Project Portfolio Server 2007 via the Project Server Gateway



Manage: Track Project and Resource Performance

Track Progress

Collaborate to deliver projects on time and within budget

- Share essential information through team project workspaces
- Keep teams aligned through task assignments and timesheet reporting.
- Proactively predict cost, resource and schedule overruns through KPIs
- Use built-in integration to communicate project-related information through Microsoft Office system applications.

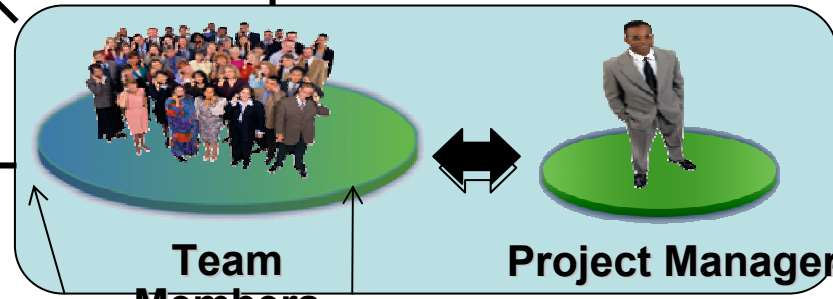
ID	Schedule Status	Task Name	Start	Finish	Actual Start	Actual Finish
1	Green	Program Management	1/2/2007	1/21/2007	1/2/2007	1/2/2007
2	Green	Program Events	1/2/2007	1/21/8/2007	1/2/2007	1/2/2007
24	Green	Sub-Mic Products Production Line Installation	1/2/2007	1/2/19/2007	1/2/2007	1/2/2007
3	Green	Project Management	1/2/2007	1/2/2007	1/2/2007	1/2/2007
4	Green	Design Assembly Lines	1/2/2007	2/29/2007	1/2/2007	1/2/2007
5	Green	Create Preliminary Assembly Line Drawings	1/2/2007	1/22/2007	1/2/2007	1/2/2007
6	Green	Hold Assembly Line Drawing Review & Approval Meeting	1/2/2007	1/23/2007	1/2/2007	1/2/2007
7	Green	Create Drawings of New Equipment	1/2/2007	2/28/2007	1/2/2007	1/2/2007
8	Green	Hold New Equipment Review and Approval Meeting	2/2/2007	2/2/2007	2/2/2007	2/2/2007
9	Green	Production Line Design Complete	2/2/2007	2/2/2007	2/2/2007	2/2/2007
10	Red	Order New Assembly Line Equipment	2/2/2007	2/28/2007	NA	NA
11	Red	Material Receiving	4/18/2007	1/2/30/2007	NA	NA
12	Red	Receive Model H200 Injection Molding Equipment	1/2/2/2007	1/2/2/2007	NA	NA
13	Red	Receive Custom Tool Equipment	4/1/2007	4/1/2007	NA	NA
14	Red	New Material Receiving Complete	1/2/2/2007	1/2/2/2007	NA	NA

Project Workspaces

Task Name	Description	Comment	Approval Status	Time	Rate	Start	End	Start	End	Rate	Cost
Production Line Design	Production Line Design		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
Equipment Facility Equipment Design	Equipment Facility Equipment Design		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
International Production Transfer System Upgrade	International Production Transfer System Upgrade		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
International Production Transfer System Upgrade	International Production Transfer System Upgrade		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
International Production Transfer System Upgrade	International Production Transfer System Upgrade		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
Administrative	Administrative		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
Administrative	Administrative		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0
Administrative	Administrative		Approved	1.0	17.0	1/2/07	1/21/07	1/2/07	1/21/07	17.0	313.0

Task Assignments

Task Name	Description	Progress	Status	Resource Name
Production Line Design	Production Line Design	100%	Complete	John Doe
Equipment Facility Equipment Design	Equipment Facility Equipment Design	100%	Complete	John Doe
International Production Transfer System Upgrade	International Production Transfer System Upgrade	100%	Complete	John Doe
International Production Transfer System Upgrade	International Production Transfer System Upgrade	100%	Complete	John Doe
International Production Transfer System Upgrade	International Production Transfer System Upgrade	100%	Complete	John Doe
Administrative	Administrative	100%	Complete	John Doe
Administrative	Administrative	100%	Complete	John Doe
Administrative	Administrative	100%	Complete	John Doe



Team Members

Project Manager

Issue/Risk	Description	Severity	Status
New FCC ruling on the standards for satellite radios	Need to ensure our products meet these standards	High	Open

Issues & Risks Mgmt

Report Title	Description	Status
Production Line Design	Production Line Design	Complete
Equipment Facility Equipment Design	Equipment Facility Equipment Design	Complete
International Production Transfer System Upgrade	International Production Transfer System Upgrade	Complete
International Production Transfer System Upgrade	International Production Transfer System Upgrade	Complete
International Production Transfer System Upgrade	International Production Transfer System Upgrade	Complete
Administrative	Administrative	Complete
Administrative	Administrative	Complete
Administrative	Administrative	Complete

Status Reports™

DEMO



Q & A

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