Enterprise Resource Management using MS Project Server 2007

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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
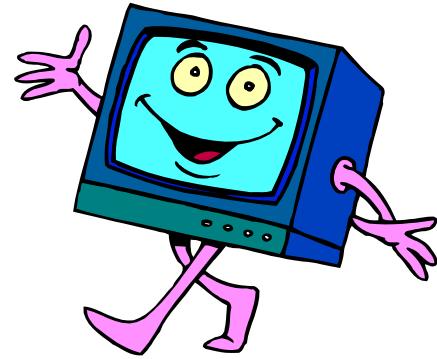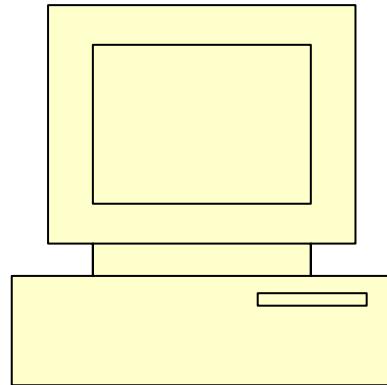
A material resource such as a test environment, a room, cables, PC's etc
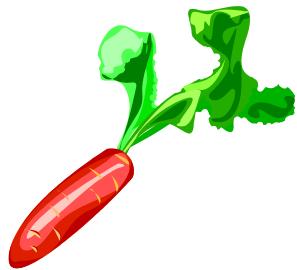
# Costs Rates
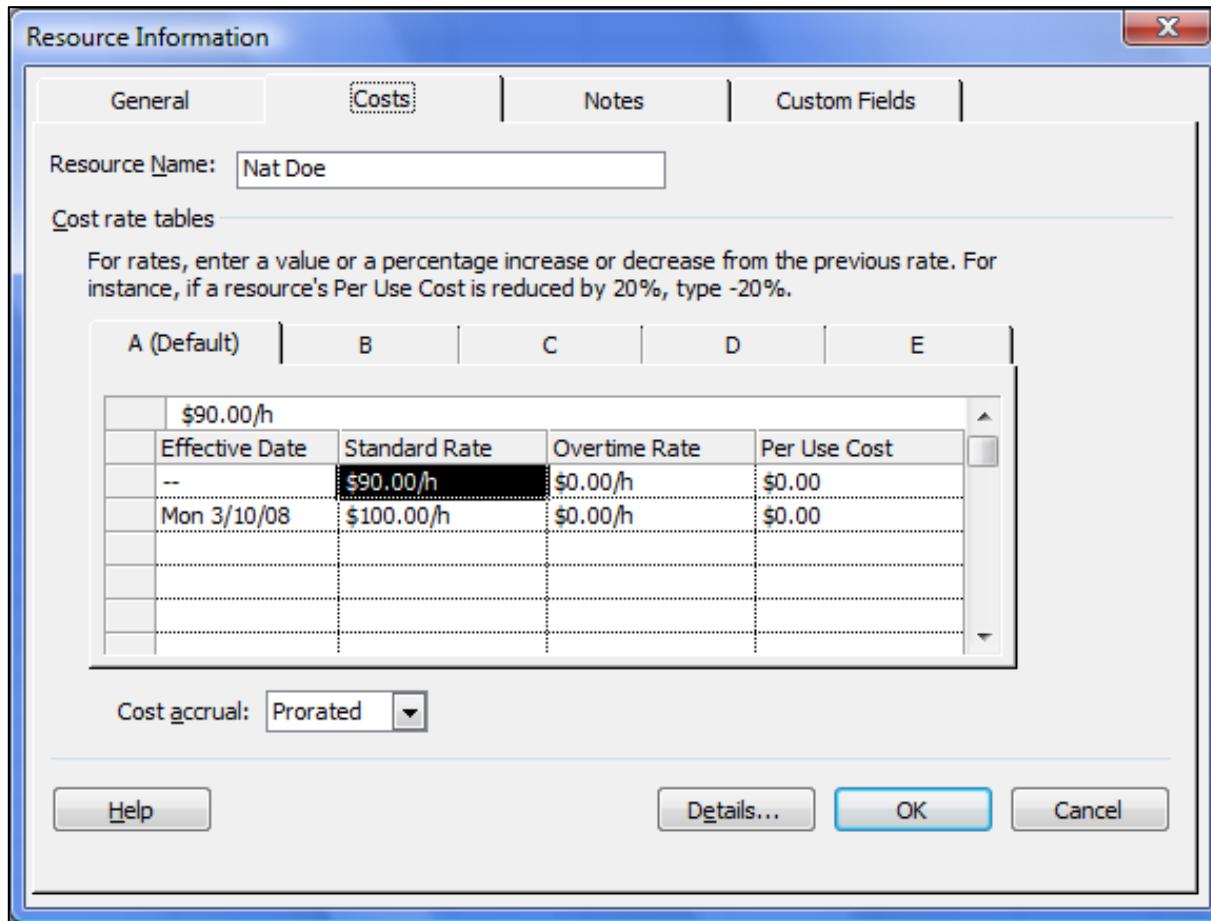
Resource Calendars
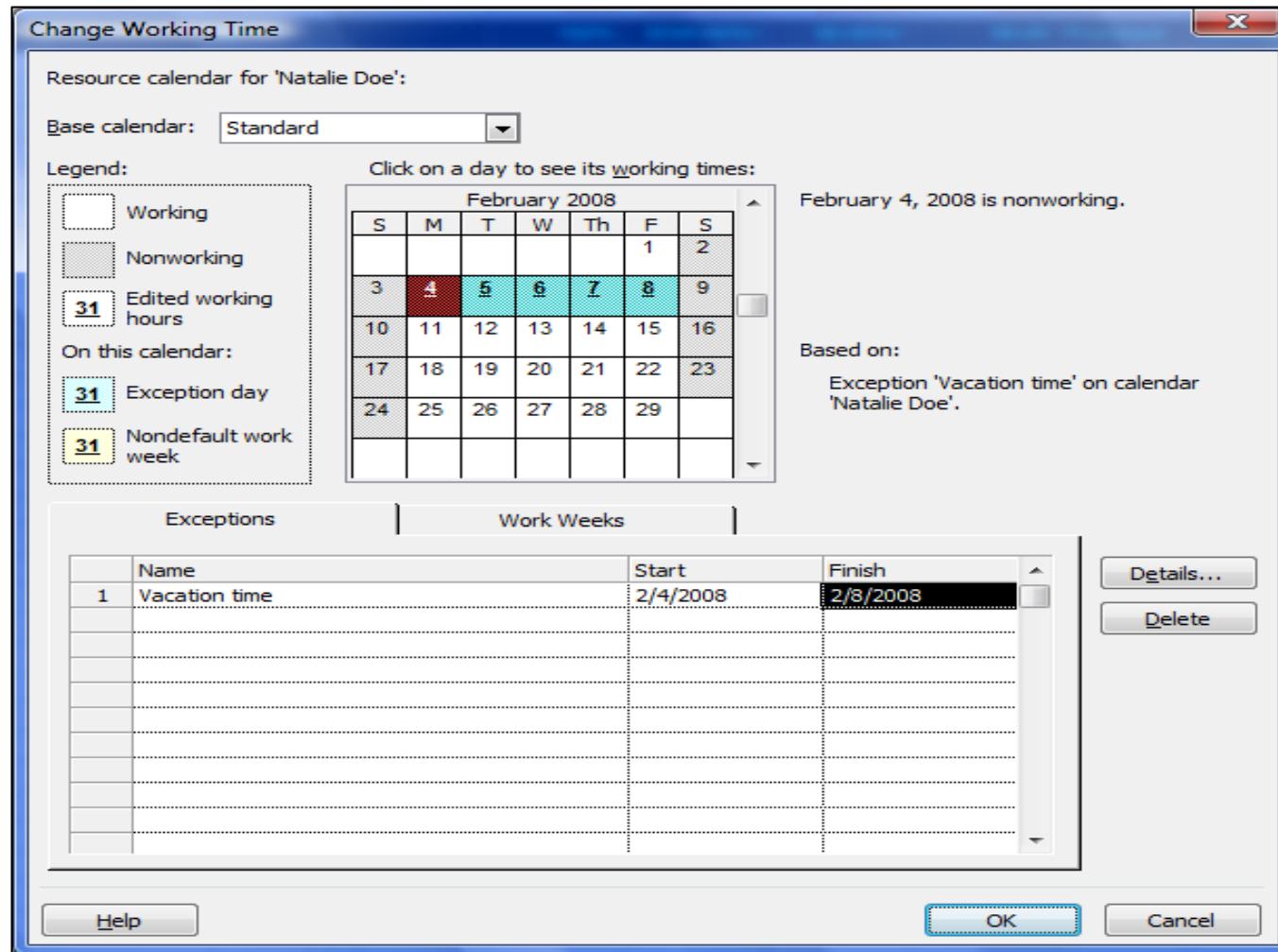
Booking Types
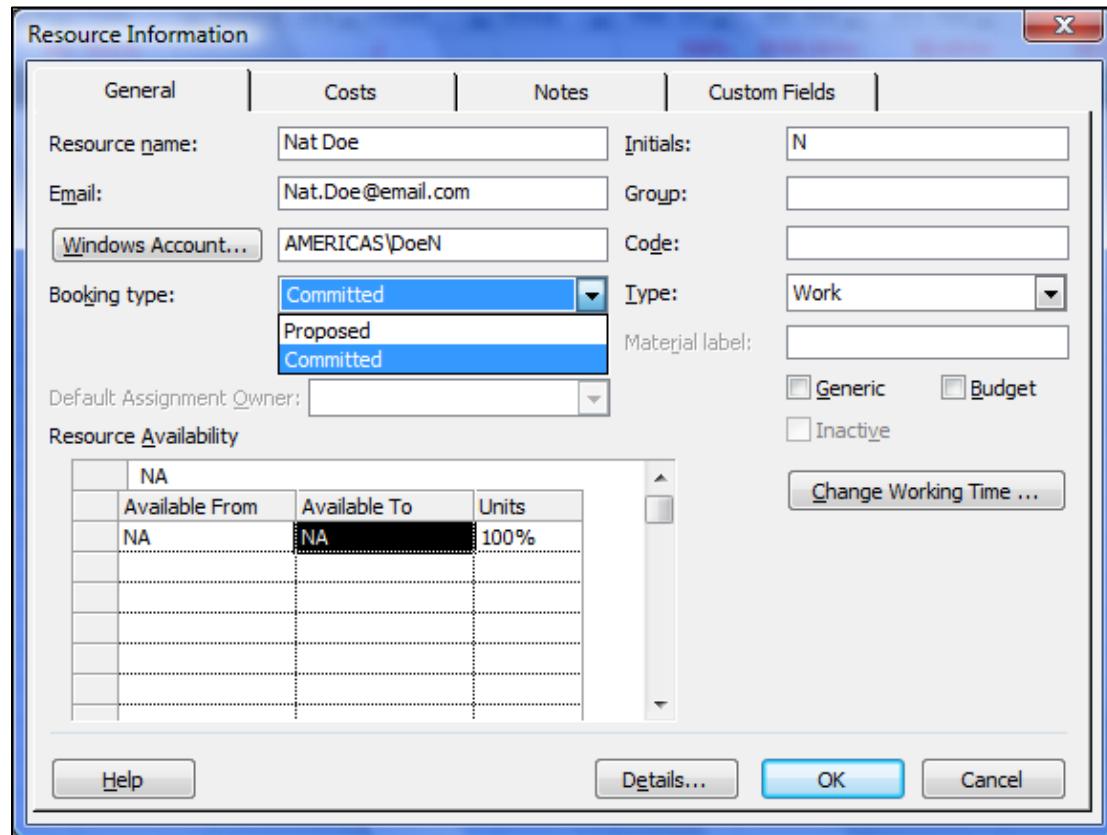
Proposed: Resource can still be booked to another project during a proposed time frame

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

Resource Availability Reporting
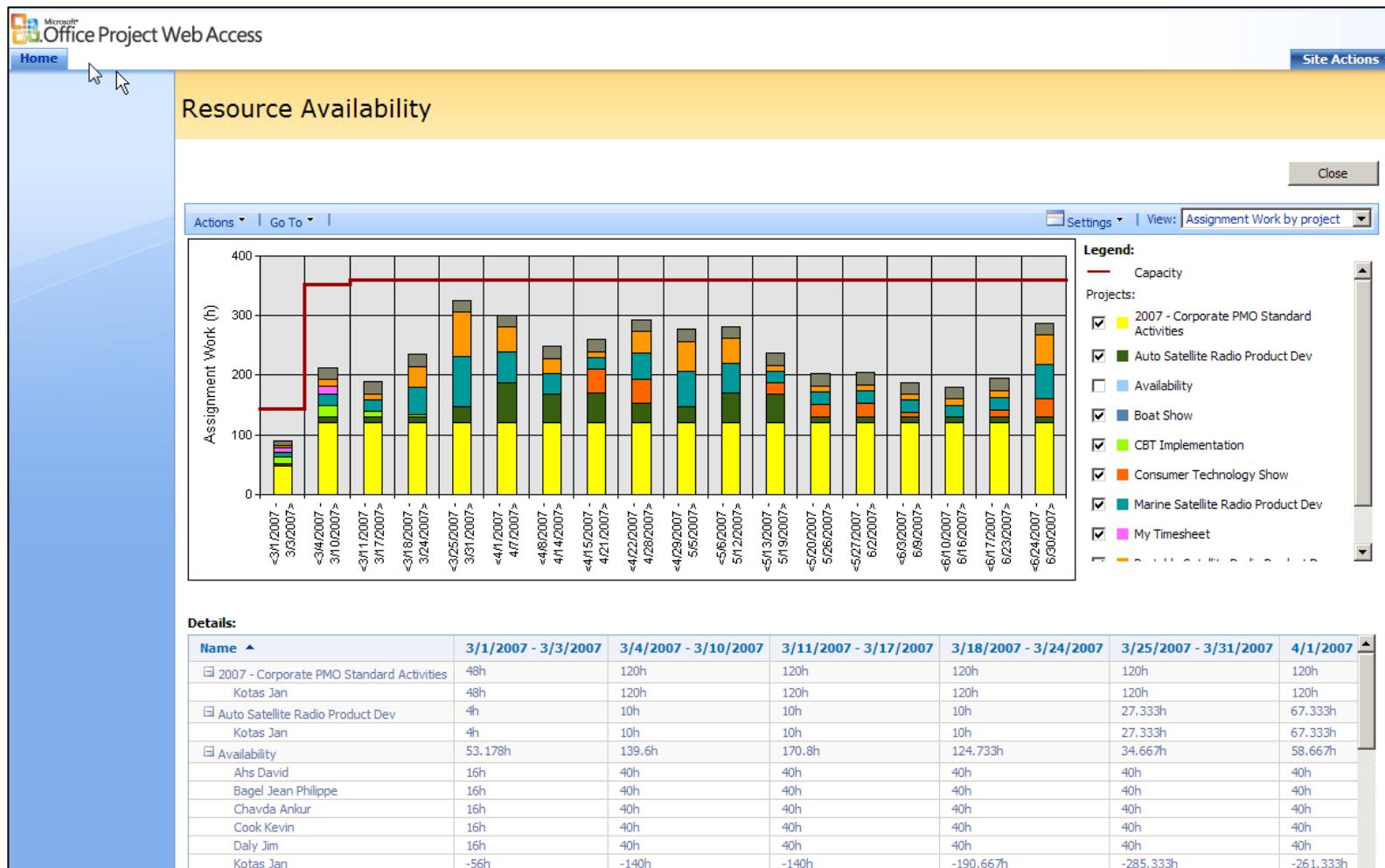
Resource Visual Reports
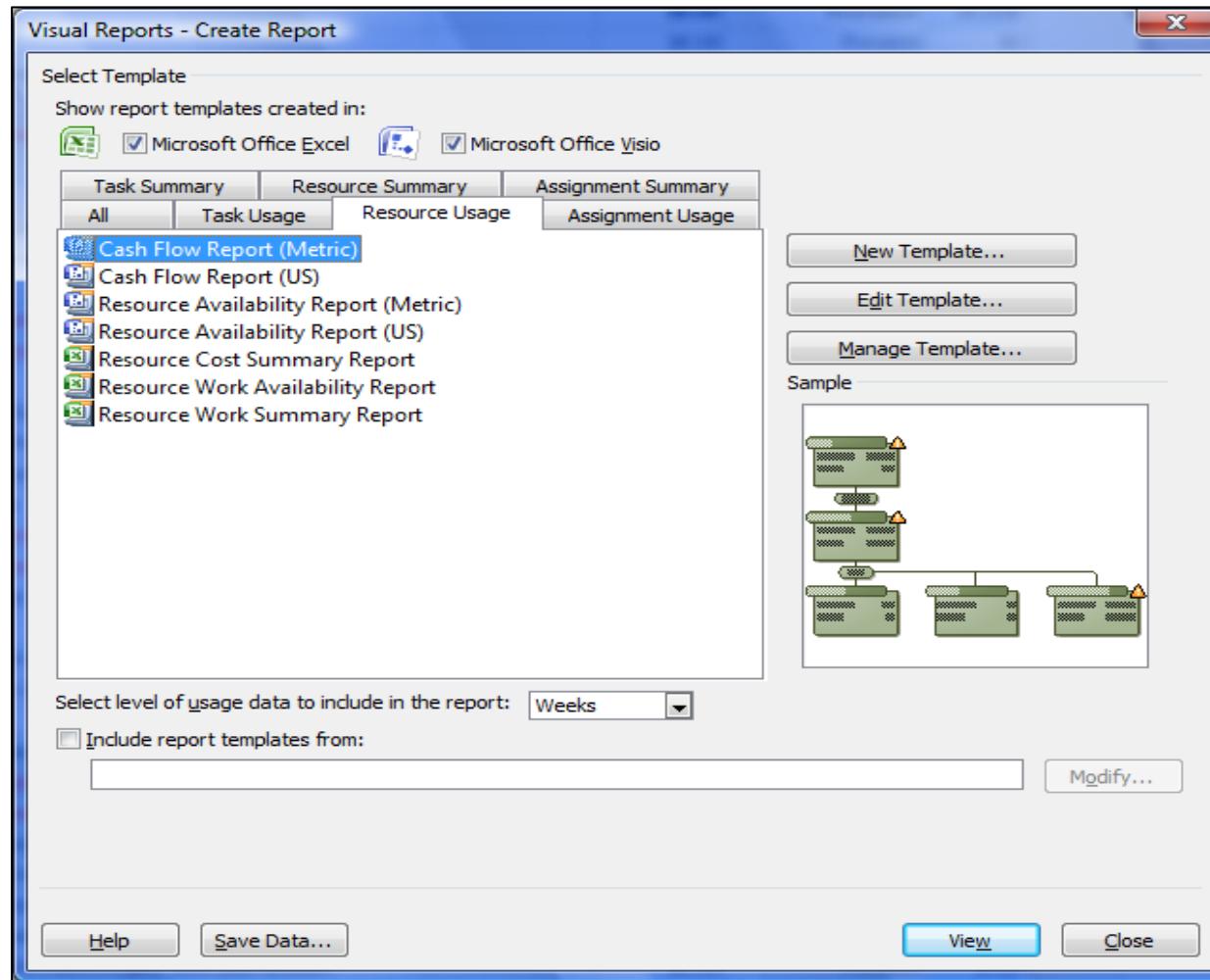
Resource Work Summary Report
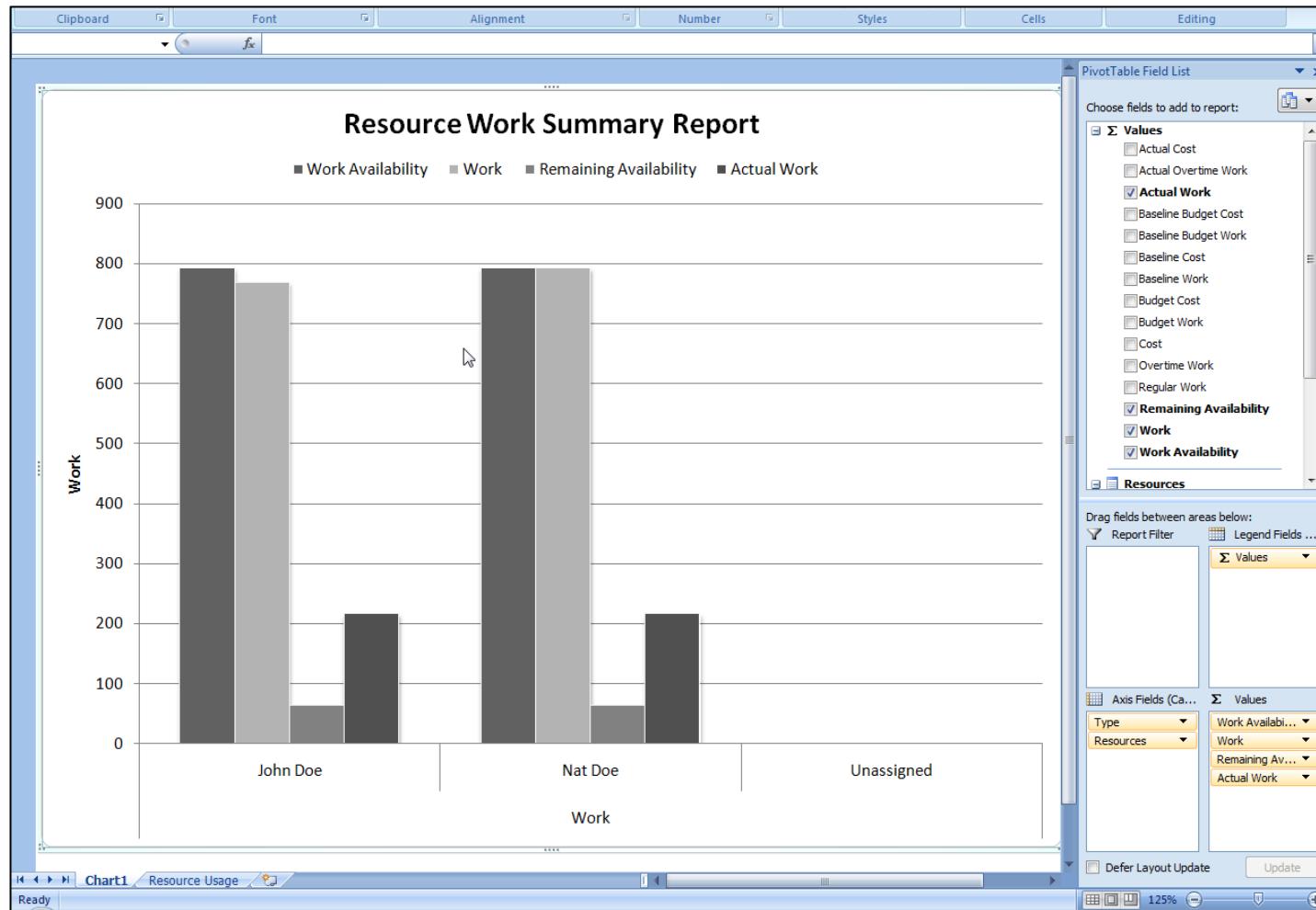
Additional Microsoft EPM Features

- 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

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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
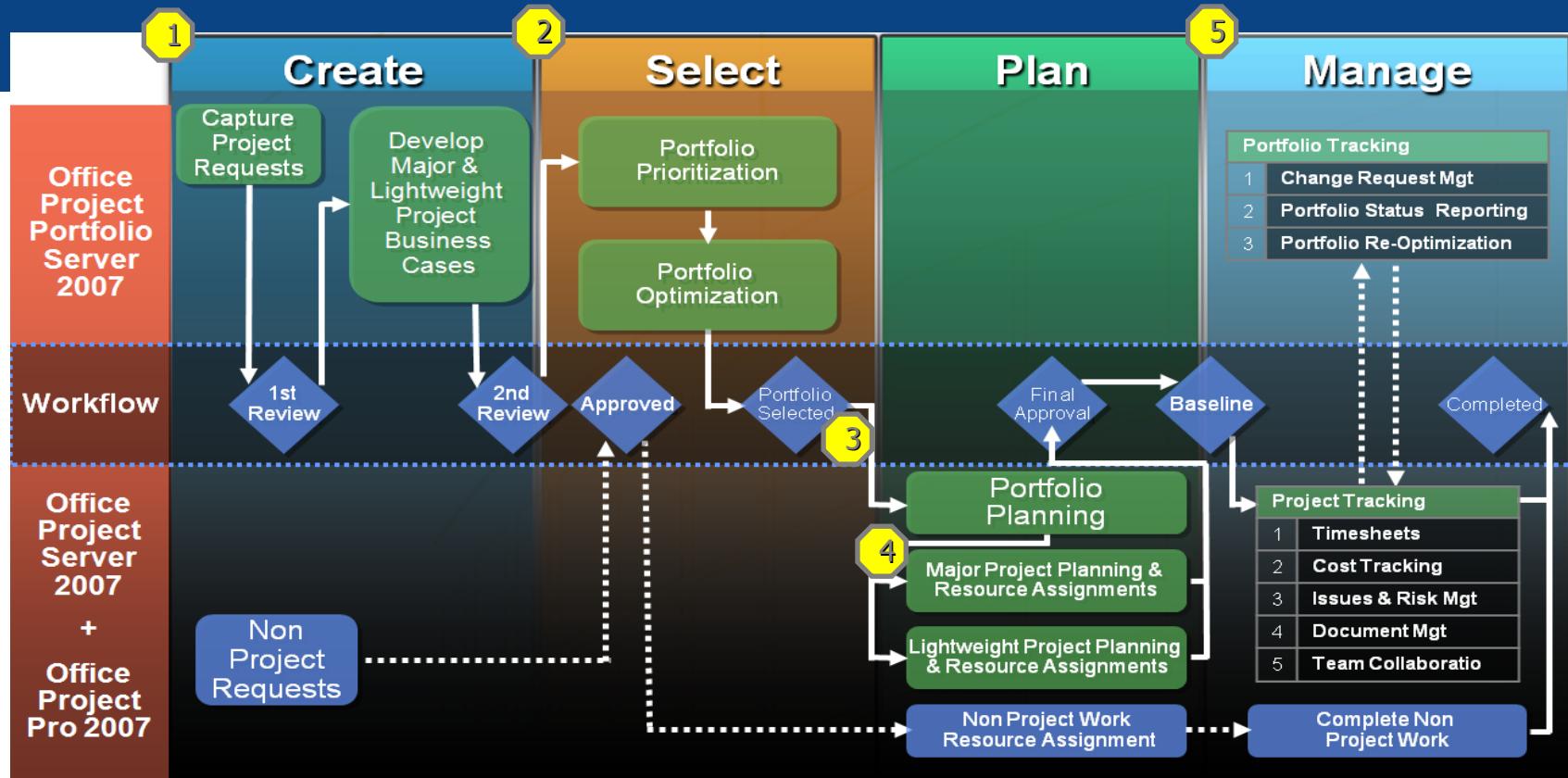
1 Capture the project and resource request and build detailed business case. (Resources Plans)

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: Capacity Planning Analysis
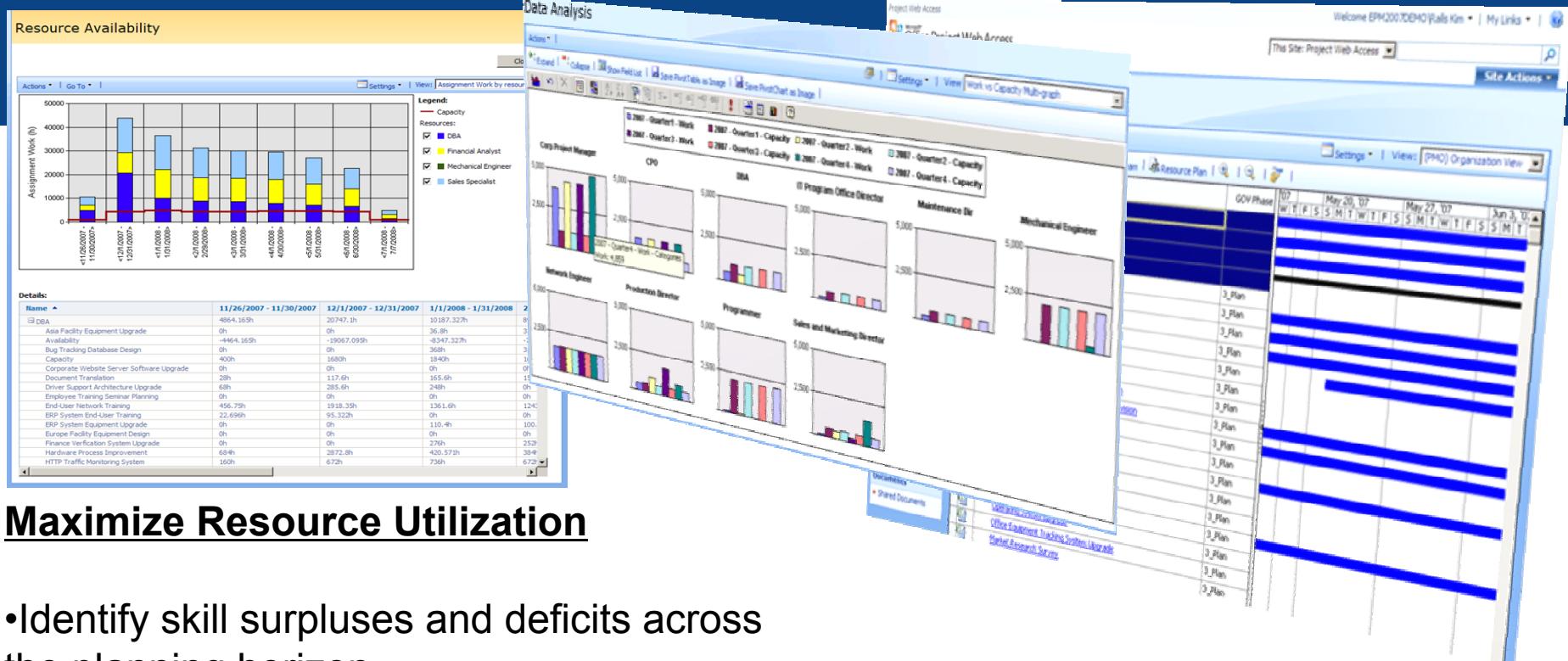
Maximize Resource Utilization

- Identify skill surpluses and deficits across the planning horizon

- Finalize project portfolio release schedule

- Analyze and communicate training and headcount requirements to HR

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Plan: Detailed Planning

Develop Detailed Project Plans

•Build the detailed project plan (e.g. detailed tasks, milestones etc.)

•Assign name d / 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
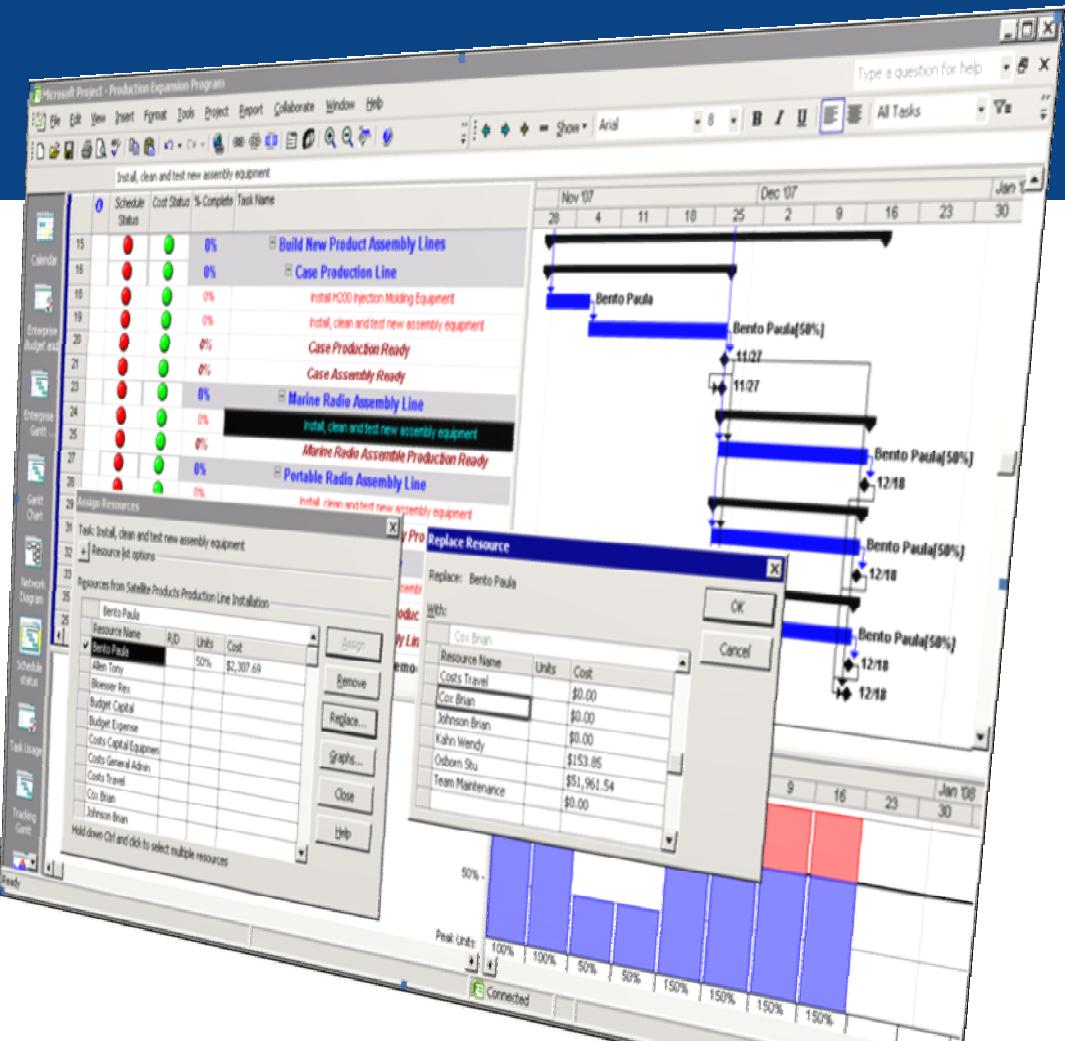
Manage: Track Project and Resource Performance

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.

Track Progress

Project Workspaces

Task Assignments

Team Members

Project Manager

Issues & Risks Mgmt

Status Reports
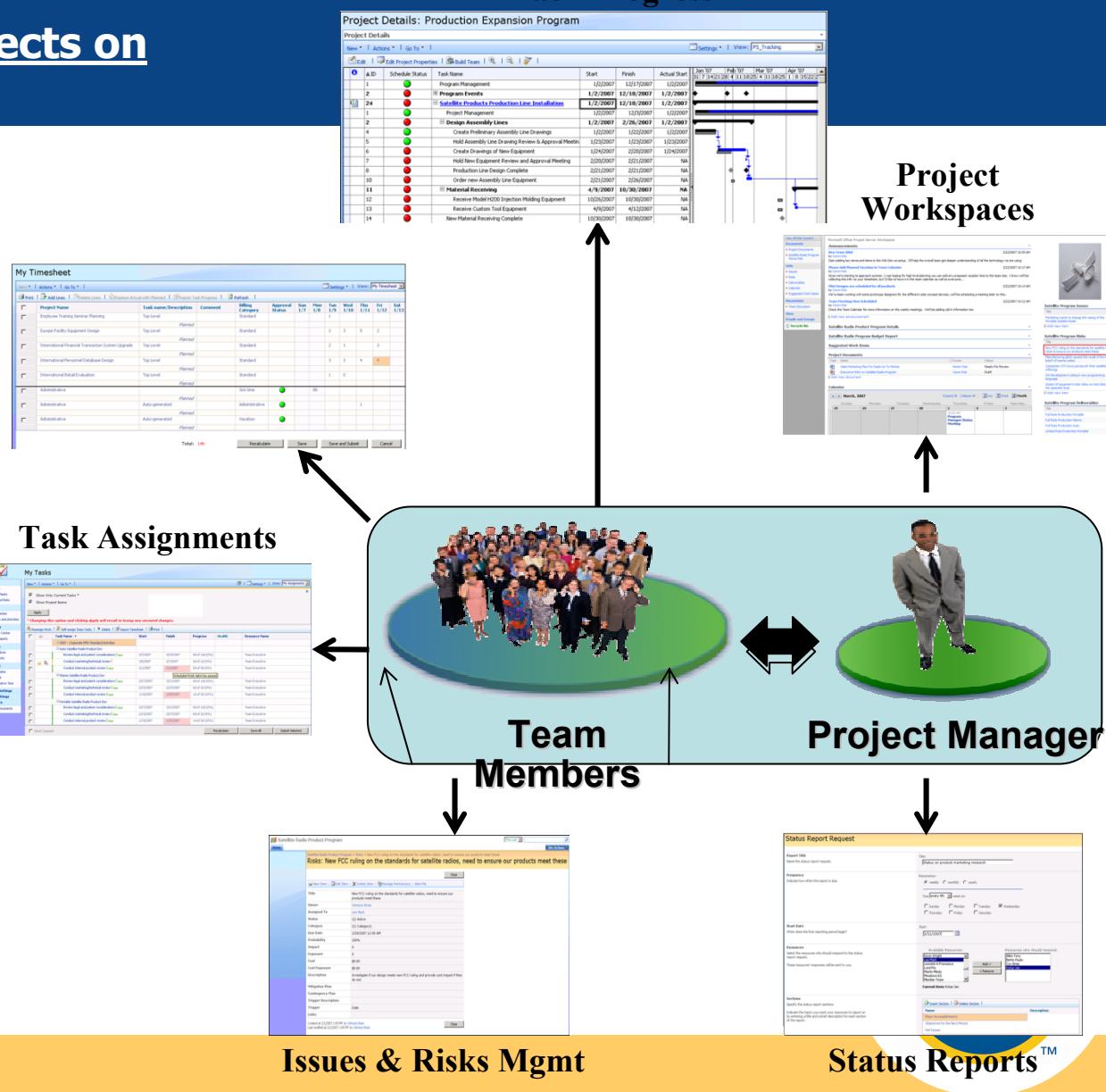
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Q & A

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