



THE PROJECT NETWORK

THE OFFICIAL INDUSTRY ASSOCIATION FOR MICROSOFT® OFFICE PROJECT
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Microsoft® Releases New Project Scheduling Certification

Mark Dochtermann, EPM Solutions Specialist, Microsoft Corp., PMP, CISSP, MSP Black Belt (Founding President and MPA Member, Sacramento Chapter)
Marie Mihail, Senior Marketing Manager, (MSL) Microsoft Corp. (MPA Member, Puget Sound Chapter)

According to 2006 CHAOS Research, a study of 10,000 global software projects completed between October 2005 and November 2006, reveals that only 35% were delivered on time, on budget, and within stated requirements¹. That's a significant improvement over the 1994 CHAOS report² where it was reported that only 9% of IT projects came in on-time and on-budget. Even when these projects were completed, many were no more than a mere shadow of their original specification requirements.

That news should be a major concern however, as the remaining software projects were either challenged or considered failures. If 65% of projects failed in other disciplines - healthcare, manufacturing, or construction for example - that would just not be acceptable. IT professionals have only recently started to embrace a formal Project Management discipline and are now starting to see some positive results from that investment.

Growing Interest in PM Methodology and Credentials

The Project Management Institute (PMI)³ has become the leading organization for the advancement and success of the discipline of Project Management globally. PMI offers several certifications⁴ including the Project Management Professional (PMP). PMI Today⁵ reports that there are currently 233,330 active, certified PMPs.

A PMP credential is a great differentiator in today's competitive job market. The question that remains, however, is whether it is sufficient to manage today's projects, given complex work breakdown structures, enterprise-wide resource management challenges, and sophisticated schedules. Add to that a mix of global project teams, who need to report project performance data to Senior Management, and suddenly, the need for additional expertise becomes quite apparent.

Microsoft Office Project 2007 Certification Program

Certifications are a proven way to validate your knowledge and expertise, not only to yourself, but also to your colleagues and your management. Rising corporate IT spending is leading to increased demand for workers with certifications in information security, project management and related disciplines. In fact, Project Management skills are especially vital to organizational senior leadership. A recent study showed that 23% of CIOs ranked project management as the area in which their IT staffs could most use improvement⁶.

Given the latest release of Office Project 2007 and the growing demand for a credible way to demonstrate expertise with this proven project management application, Microsoft is pleased to announce the newest certification family for Office Project 2007 and Office Project Server 2007. Microsoft certifications represent the mark of tool utilization expertise and offers increased breadth of knowledge, increased opportunities on the job, and increased value to the organization.

More than a product certification, the new Office Project 2007 certification suite is designed specifically to help project managers, in all types of business environments, apply the leading project management best practices and methodologies as established by PMI. The result? Project Managers now have a thorough understanding of how to establish and maintain project schedules, resulting in better project outcomes, greater efficiency, and optimal resource management.

Before highlighting how these Office Project 2007 certifications can benefit Project Managers, it is worthwhile to consider some

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“Microsoft recognizes MPA as the leading industry association helping project managers and organizations get the maximum value out of Microsoft Office Project. With its different avenues to interact and network and resources on Microsoft Office Project, MPA is playing a pivotal role in helping project managers and organizations learn from each other and maximize the success of their projects using Project. We strongly believe that any individual managing projects would benefit immensely from being part of this association.”

**Michael Angiulo, General Manager
Microsoft® Office Project, Microsoft Corporation**

MPA Mission Statement

MPA is dedicated to fostering a dynamic professional association that serves as the preeminent resource for Microsoft Office Project to a worldwide member community.

Email: info@mympa.org Web: www.mympa.org

MPA Headquarters

1340 Eisenhower Place, Ann Arbor, MI 48108 (U.S.A.)
Phone: 734.741.0841 Fax: 734.741.1343

MPA Staff

Chief Executive Officer Christine Buonocore
VP, Sales & Marketing Beth A. Swartz
VP, Strategic Alliances Tim Cermak
VP, Systems & Services Kirk Vantine

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From the Editor

The evolution of project management is well underway. As Microsoft unveils the certification programs now available to all customers, it is evident that these credentials will play an important role in the professional development of this discipline. Doc Dochtermann and Marie Mihail, emphasize this in our issue's lead article. Supported by research and based on fundamentals of sound project management practice, the Microsoft suite of credentials will provide a measurable competency that can assist both the employee and employer in improved performance. More information on certification will be available at the Microsoft Project Conference slated for October 29 – 31, in Seattle, Washington.



Beth A. Swartz

This special expanded edition of the Project Newsletter also covers a broad range of other topics that the professional practitioner will find valuable. Pcubed, one of our founding sponsors, was the recipient of the 2007 Microsoft EPM Partner of the Year Award. In this issue, they share with us the “secrets” of the Earned Value Management Solution. Our regular feature “Ask Brian” raises interesting points in “Iterative Design/Build Loops in the Configuration of Project Server” by Brian Kennemer. MPA then went out to discuss some interesting buzz on the street in an interview with Dan Renier as we learned more about “YJTJ™”. Some helpful tips were provided by Genea Mallow-Jensen in “Working in Customized Project Assignment Views”; Bonnie Biafore in “Send Your Tracking Change Requests in Project” and by Ira Brown in “Got to Get you Into My List”. John Reinheimer makes a special offer to MPA members with a working copy of his “Project Plan Analysis”, available by request. Al Callan raves about the WBS Chart Pro while Michael Steinberg offers new Project users “Top Ten” (actually 12) Tips. Last but not least Nicholas Pisano begins a three-part series addressing the “Building Blocks to an EPM Solution”.

Our diverse views and needs are highlighted by this wide range of topics and discussions. MPA strives to offer unique information for every level user of Microsoft Office Project, which is in fact, the fundamental structure of the MPA philosophy. MPA offers networks of information access, available through content and contact, to impact your performance. We hope that we have achieved our goal with this expanded edition.

Certification - Continued from page one

common market perceptions around Project Management, both the “Myths” and “Truths”:

Redefining Market Perceptions

<p>Myth Project management is hard and reserved for high-end, lengthy and complicated projects.</p>	<p>Myth Project management new generation technology certifications are just for IT project managers.</p>	<p>Myth Office Project 2007 can be perceived as a time-consuming application to learn and use effectively.</p>
<p>Truth Project management skills and tools can be for anyone responsible for coordinating, communicating and delivering a project.</p>	<p>Truth MS Office Project 2007 certifications benefit project managers in all business environments, not just in a technical (IT Professional) environment.</p>	<p>Truth Familiarity with Office Project 2007 enables individuals to use the program quickly and easily, maximizing project results and resources management.</p>

Initial feedback from the Project Management community has been enthusiastic about the opportunity to validate project management expertise with Office Project 2007. How do these certifications really

impact a professional working in a project manager role? By learning how to maximize your usage of Office Project 2007 as the project management application, you will build your project management skills and competency so that you are now in control of the project.

A commonly asked question about these new Microsoft Office Project 2007 certifications centers upon whether the certifications are really about *Project Management methodologies* or about validating expertise with the management of *Project Management tools*. The new Office Project 2007 certifications focus on leveraging Office Project 2007 as the Project Management tool. However, they are also designed to complement the PMI® Project Management Body of Knowledge (PMBOK) methodology. Achieving Office Project 2007 certifications are a perfect way to

showcase your commitment to the project management discipline and further differentiate yourself as a proven project manager.

The Office Project 2007 certifications are designed to support both the Desktop and Enterprise Project Management (EPM) business environments. This ensures that whatever your project management responsibilities cover, the Office Project 2007 certification family includes a perfect option for your learning needs. This chart illustrates the three certifications, the associated exams and training courses, and how these Microsoft Office Project 2007 certifications align to and complement the PMBOK methodologies.

Office Project 2007 Certification Family

- Benefits all project management communities
- Provides Project Management application expertise
- Complements PMBOK methodologies
- New Generation Certification Family™

Certification	Exam	Course
Desktop Technology Specialist (MCTS)	Exam: 70-622 (July 2007)	Course: 5927 (August 2007)
EPM Technology Specialist (MCTS)	Exam: 70-633 (October 2007)	Course: 5928 (November 2007)
EPM Professional (MCP)	Exam: 70-634 (January 2008)	Course: 5929 (February 2008)

To maximize the learning experience, we recommend that you have a good understanding of key project management concepts and terminology (i.e. PMBOK). In terms of how these certifications can help you in different types of project management capacities, the

following section outlines the key topics, skills and roles.

- The MCTS: Managing Projects with Microsoft Office Project 2007 certification validates the skills of a project manager who uses Office Project 2007. This individual may work on projects as a team member, project lead, project manager,

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Earned Value Management Solution

Winner of the 2007 Information Worker Solutions Microsoft Enterprise Project Management Partner of the Year Award

Jay Mancuso, Program Management Consultant, Pcubed (MPA Member, Frontrange Chapter) and Sean O'Brien, Senior Vice President, Pcubed (MPA Member, New York City Metro Chapter)

Elements of EVM have been in practice since the turn of the century. In the 1960's, the U.S. Department of Defense established the Cost/Schedule Control Systems Criteria (C/SCSC) as a financial control methodology, which has evolved into a more streamlined project management methodology known today as EVM. This practice has become widely used and boasts a direct correlation between the use of EVM methodologies and program/project success. In many cases, EVM is mandated for certain federal agencies and government programs and projects. In addition, many private companies have adopted EVM as a means to comply with the increased accountability brought forth by the Sarbanes-Oxley Act of 2002.

Many organizations practice some form of rigor in planning, executing, controlling, and measuring performance on their programs or projects. The most common practice followed is the comparison of actual cost and schedule performance to the planned or budgeted cost expenditures and estimated timelines for accomplishing the scope objectives of the project. What typical project monitoring and control does not adequately measure, is the amount of actual scope that has been accomplished or "earned" in relation to the budgeted and actual cost and schedule. In other words, cost and/or schedule status may not always reflect the true picture of actual work accomplished, which is frequently a subjective determination.

So what is EVM and what makes this different from the typical project controlling and monitoring? EVM is an advanced means of objectively measuring the true health of a program or projects technical (scope), cost, and schedule condition and provides the ability to better forecast the outcome of the program or project. EVM's underlying foundation is the processes and methodologies used to achieve a more structured and disciplined approach for:

- Improving scope definition
- Limiting scope increase
- Measuring and reporting progress objectively
- Providing the visibility of potential challenges

Processes include at a minimum:

- Definition and documentation of project organization and planning techniques: a Work Breakdown Structure (WBS), Organizational Breakdown Structure (OBS), Responsibility Assignment Matrix (RAM), Budget Management, Schedule Management, Change Control, etc.

- Definition of planning values for each work element or work package
- Definition of "earning" rules for which work accomplishment is recognized
- Application of formulated calculations for measuring progress and forecasting project outcomes

Successful practitioners of EVM have instituted the fundamental elements described above as a means to improve the success rate on their projects and programs. While this reflects EVM from a methodology and process standpoint, most organizations augment their processes with the use of automated scheduling, accounting and cost control tools.

Figure 1 depicts a generic example of how processes and systems are integrated to achieve a sound EVM capability.

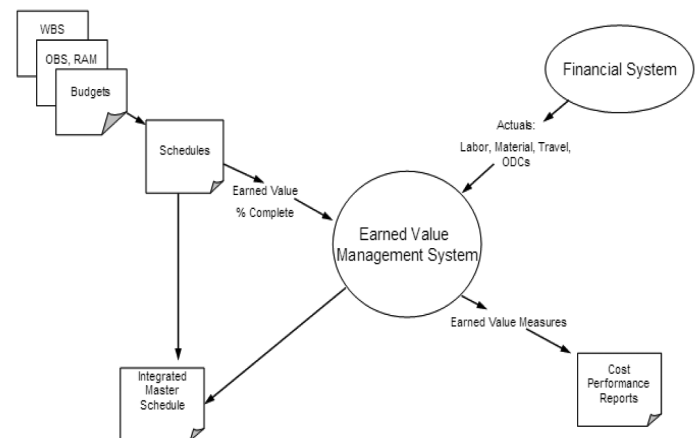


Figure 1. EVM Process and System Integration

Enabling processes with technology applications can be complex and laborious as it typically requires integration with multiple and disparate systems.

Recognizing this challenge, Pcubed and its development partner Friedrich, Klatt and Associates, have developed a solution that simplifies the ability to seamlessly integrate process with technology and achieve a robust EVM capability. Leveraging Microsoft Office Project Server 2003 or 2007 and Microsoft SQL 2005 for its data mart and custom OLAP cubes, the solution provides a means for embedding EVM processes, integrating cost and schedule data, and accessing and assembling data for required reporting outputs. Figure 2 shows the architecture of the Earned Value Management Solution.

Continued on page five

Solution - Continued from page four

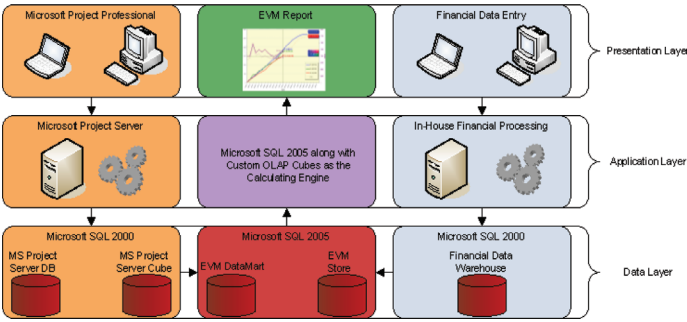


Figure 2. Earned Value Management Solution Architecture

The solution allows for any project staff member such as schedulers, work package leaders, or control account managers to plan work packages representing the WBS in Microsoft Office Project Professional. Each work package is coded with an earned value type to determine how it will accrue value, for example 50/50, 0/100, or physical % complete. Based on the “as of” status date, the solution determines the amount of the planned value, and based on the % complete progress update, the solution determines the value earned. This data is combined with the “as of” date actuals coming in from any cost and time accounting system to bring together the Actual Cost of Work Performed (ACWP). All data is stored in a data mart, which can be used to create numerical or graphical views of key performance indicators such as planned figures, variances against baselines, and estimates regarding completion. Figure 3 and Figure 4 show sample reports.

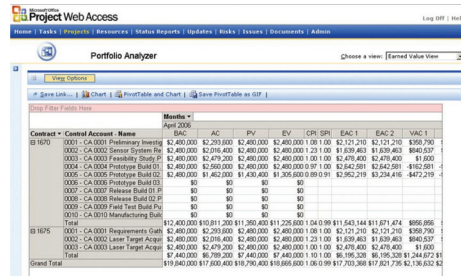


Figure 3. Earned Value View in MS Office Project Web Access

Figure 4. Cost Performance Report based on EVM

In summary, the Earned Value Management Solution succeeds at combining the discipline of EVM methodologies and processes with “state of the art” technology. It seamlessly integrates and reports project data based on EVM criteria and best practices, ultimately leading to a greater chance of achieving project success.

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Iterative Design/Build Loops in the Configuration of Project Server

Brian Kennemer, EPM Services Solution Group, COE Group, Microsoft Corporation
“endlessly obsessing about Project Server so you don’t have to”; <http://www.projectified.com>

I have always been a fan (and in fact a major proponent) of the idea of iteration in the long term deployment and roll out of Project Server across an organization. Russ Young of QuantumPM and myself were one of the first ones to talk about this in the **Enterprise Project Management Deployment Guide** way back during the Project Server 2002 days. Our work in this area was based on ideas that were widely held not only in the Project Server consulting world, but in almost all enterprise software organizations. These iterations were fairly large scale ones dealing with the staged, incremental roll out of Project Server to the many organizations within a larger organization as opposed to the massive one-time dropping of Project Server on the entire company. This approach started with a small, but representative (as much as possible) group, or small organization. Then using the lessons learned from this group, the system would be adjusted (new fields added, new views, server architecture adjusted, etc.) and then another group would be added. This process would repeat until the entire organization was using the tool. Each iteration added not only new people, but also new or fixed functionality in the form of views, security, process, etc. This method is now used by virtually every consulting company doing Project Server deployments.

The kind of iteration I’m talking about here, happens on a much, much smaller scale and deals with the actual design and production of the configuration of the Project Server system for a given organization. Instead of dealing with the successive roll out to new organizations, I’m now talking about the iterative design/build loops around adding new fields, views, or security configurations within any one of those larger iterations.

Understanding of the Environment and the Problem(s) to be solved

This includes the collection of what the users want the system to do for them, in addition to the observation of the system at work. This allows you as the consultant, to help make suggestions.

Configuration/Build

From the knowledge gained so far, the system is configured to the best of your ability. This includes: fields, views, security, etc.

Simulations

Most organizational uses of tools like Project Server, revolve around the capture and editing of project data and the subsequent use of that data to make specific business decisions that effect the ability of the organization or project team to function with regard to projects. I look at kernel, the very core of Project Server’s use in an organization, as the understanding of data via views or reports by decision makers. Everything else that project Server does supports this in some way or another. With this driving principle

in mind, the check or test of the configuration/build ‘stage’ is a simulation. Here decision makers use the tool as it is currently configured to simulate the decision making processes they must go through to manage their work/projects/portfolios/etc. These simulations have the decision makers using the tool in a conference room, with the design team and other decision makers up on a projector. The team talks through the decisions they need to make and what data they would need to see to make them. Points of discussion include: How it would need to be displayed, grouped, sorted, how it should be secured, who can see it, who can’t see it, etc. All efforts are directed toward a better understanding of how the tool will be used and what decisions it will be used to support.

Revisiting the build stage...

At this point, we jump into a loop of Configuration/Build and Simulation loops that successively improve the suitability of the Project Server configuration to the needs of the decision makers that will be using it to run the business/projects/work. If this means new views or fields, then so be it. If it means configuring and rolling out the use of timesheets to those doing the work, or the development of custom OLAP cube building routines to provide company specific data in Portfolio Analyzer views, then that is fine too. The point is that the design/configuration happens based on simulated use of the product as it is configured currently.

This process can take place either prior to the system “going live” or as part of the addition of new users to the system. Also, a variation on this process happens on an ongoing basis while the system is being used by the organization. As people touch the system and use it as part of their project management/portfolio management processes, their new experiences and new expectations, often become new requirements for the system. The administrator of the Project Server system should constantly collect suggestions and new requirements and evaluate them with the team for inclusion in the system. This constant updating of the product’s configuration ensures that it keeps up with the most current processes in use within the organization.

Obviously, this is not rocket science and I’m not claiming to have ‘invented’ it by any means. I’m sure that many others are using similar processes for their Project Server (or other PM software) roll outs. I should also mention that this process is only suitable where the organization is able to devote several weeks (at least 3 or 4) to this initial design process. Often organizations that are rolling out Project Server have only a very short time to do their initial design and configuration. In cases like this, the process laid out here may require too much time. But it should be said that while this process requires more time than many methodologies, it is much more likely to produce a usable system. Shorter term processes get you up and running very quickly, but at the cost of fully understanding the processes and needs of the organization.

The YJTJ™ Process: An MPA Interview with Dan Renier

Dan Renier, Principal Consultant, Milestone Consulting Group (MPA Member, Twin Cities Chapter)

MPA is committed to serving the Microsoft Project user. Toward this end, we consistently strive to make strong, relevant information available to the Microsoft Project practitioner. Recently, MPA sat down to address Milestone's YJTJ™ Process as this process, as noted by Microsoft Project users, is strong, highly relevant information.

MPA: Dan, what is Milestone's YJTJ Process?

Simply put, YJTJ is a mindset for working effectively as a project manager using Microsoft Project. The YJTJ process is designed to assist project managers with understanding their responsibilities with initiating, planning, executing, controlling, and closing projects, and how to work through the extremely rich features of Microsoft Project to support this process.

In order to work effectively with Microsoft Project, you must understand what Your Job (YJ) is and what the Tool's Job (TJ) is at every point throughout a project lifecycle. Once you understand this process, you are provided with an ability to work in concert with Microsoft Project as opposed to in conflict. Simply stated, you know exactly what you need to do and what you should consistently expect Microsoft Project to do.

For Microsoft Project Standard and Professional implementations, we work very closely with management teams to determine what we call "critical success factors" for a successful deployment. During this process, at some point, at least one management team member will state the following: "Dan, you must get our project managers to a point of spending more time managing projects and less time working with and being frustrated by Microsoft Project." This statement becomes a primary critical success factor, and is addressed through our YJTJ process.

MPA: Does YJTJ apply to a particular version of Microsoft Project?

No. YJTJ is applicable to every version of Microsoft Project from the very first release through Microsoft Office Project 2007. It is applicable whether you are working on large projects with multiple shared resources using Microsoft Office Project Server 2007 or managing a small project with a prior release of the desktop tool.

MPA: So, if I am a project manager using Microsoft Project, what is my job and what is the tool's job?

To address this, let's begin with the YJ part of the acronym. Your job as a project manager begins with possessing a good understanding of globally accepted project management principles and a solid understanding of your organization's interpretation and utilization of such principles. Once understood, you should then use Microsoft Project in a manner that supports and allows you to visualize your organization's project management process.

From a Microsoft Project perspective, on the surface, YJ is actually very simple and may be stated as follows: your job is to provide Microsoft Project with information related to the schedule, and nothing else. That in itself allows Microsoft Project to be exactly what it is primarily designed to be, a scheduling tool. YJ entails a good understanding of Microsoft Project which may be gained through understanding the YJTJ process as it applies to all phases of a project Microsoft Project supports.

MPA: So what type of information do you categorize as YJ?

Microsoft Project knows nothing about your company, the business you are in, the unique product or service you are trying to introduce, who is working on your project, the deliverables you must produce, or the activities you must perform in order to close your project. You do. You bought Microsoft Project as a trusted advisor to help you figure out, document, and communicate when your project's activities, deliverables, phases, and the overall project are going to start and finish.

Therefore, based on this information, YJ is to feed Microsoft Project the information it knows nothing about. This includes, but is definitely not limited to: what phases are appropriate for this project? What deliverables need to be produced? What activities need to be performed? What are the dependencies between deliverables and activities that must be honored by nature or by defined process? Who has the requisite knowledge to complete each of the tasks? How much effort (work) your experts believe is required to complete tasks? etc.

Once you provide Microsoft Project with this basic information, it will do exactly what you bought it to do - produce an accurate schedule. Microsoft Project will tell you when tasks, deliverables, phases, and the overall project start and finish. And, if desired, you can bring the availability of your experts into the equation and have the schedule account for resource availability. From a scheduling perspective, at all times, the "task" start and finish fields are Microsoft Project's job. We never touch task start or finish as that is the tool's job! And, throughout the life of a project, there are many other fields that fall into the YJ or TJ category depending on a number of factors. The YJTJ process goes much deeper than just task start and finish.

MPA: Wait a minute here, Dan. You're telling me you never touch the start or finish fields in Microsoft Project. We live in the real world and there are deadlines to meet. Naturally, I have to tell Microsoft Project when certain tasks are going to end.

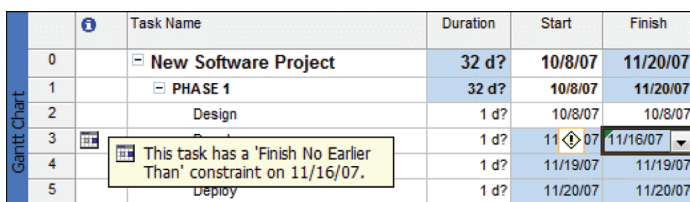
To address your first statement, we never enter values in the task start and finish fields. There are other start, finish and date fields in Microsoft Project that are perfectly acceptable to enter values into, and at times very important to do so.

Continued on page eight

MPA Interview - Continued from page seven

To your second statement, it is true that we all have deadlines to meet. Have you ever been handed a date you need to complete an activity by, and then manually entered the date in the task finish date field? When you do so, it is very important to know that Microsoft Project is programmatically designed to think finish-no-earlier-than when you are thinking finish-no-later-than.

For example, let's assume you have been instructed to finish the "Develop" task no later than November 16, 2007. When you enter 11/16/07 into the task finish field, Microsoft Project has now instructed the task to finish no earlier than 11/16/07 as shown by the constraint indicator (Figure 1).

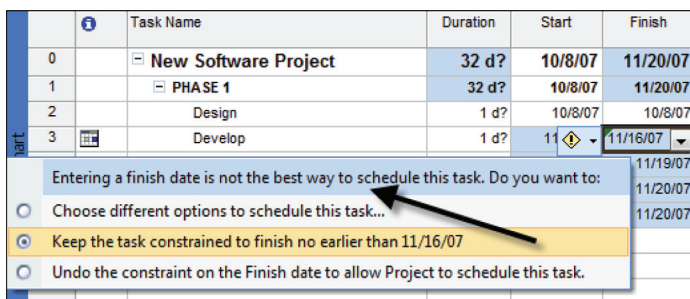


	Task Name	Duration	Start	Finish
0	New Software Project	32 d?	10/8/07	11/20/07
1	PHASE 1	32 d?	10/8/07	11/20/07
2	Design	1 d?	10/8/07	10/8/07
3		1 d?	11/16/07	11/16/07
4		1 d?	11/19/07	11/19/07
5	Deploy	1 d?	11/20/07	11/20/07

This task has a 'Finish No Earlier Than' constraint on 11/16/07.

Figure 1. Finish No Earlier Than constraint indicator

And, as evidenced by the Smart Tag text that may be displayed when you edit the task finish field, even the engineers at Microsoft will agree, that entering a value into the task finish field is not a best practice (Figure 2).



	Task Name	Duration	Start	Finish
0	New Software Project	32 d?	10/8/07	11/20/07
1	PHASE 1	32 d?	10/8/07	11/20/07
2	Design	1 d?	10/8/07	10/8/07
3	Develop	1 d?	11/16/07	11/16/07

Entering a finish date is not the best way to schedule this task. Do you want to:

- Choose different options to schedule this task...
- Keep the task constrained to finish no earlier than 11/16/07
- Undo the constraint on the Finish date to allow Project to schedule this task.

Figure 2. Smart Tag text

In this example, YJ is to enter a Constraint Type, a Constraint Date, and a Task Note describing the reason for constraining the schedule. Microsoft Project's job, according to YJTJ, is to manage task start and finish dates at all times (TJ).

MPA: OK. I'm not sure I quite understand, I think you better tell me a little more about this then.

Basically, you start with a good planning process beginning with task planning. The task planning process includes: building out your Work Breakdown Structure, adding dependencies between tasks observed by nature or defined process, and by adding known constraint and/or deadline date information. Next, you build a team of experts to be assigned to tasks to complete the resource planning process. And finally, you assign resources to tasks based on each resource's availability and expert judgment work and/or duration estimates to complete the assignment planning process. If you do not input resources into your

schedule, you still need to solicit expert judgment work and/or duration estimates and input that information into Microsoft Project. Based on this task, resource, and assignment information, Microsoft Project will build the schedule and tell you when tasks, deliverables, phases, and the overall project will start and finish (TJ).

If you don't like the answer Microsoft Project gives you, you need to do your job as a project manager which includes but is not limited to: negotiating with resource managers for additional resources and/or availability of currently assigned resources, negotiating an extension on a deadline date and/or the scope of the project with the project sponsor, etc. If you must ask for an extension, you will then have documented in your schedule all of the information about the current scope of the project, the natural progression of activities, and the resources allocated to you, etc. You can then use Microsoft Project as a powerful tool to illustrate your position during negotiations.

MPA: OK. I think I am beginning to understand. What's happening is that I am really using Microsoft Project as a model to help me calculate a very complex problem. Then I can try out the impact on dates by adding resources, removing or simplifying deliverables, starting design before requirements are completely done, and so on.

Exactly!

MPA: There are so many other features in Microsoft Project, especially when we start talking about resource management and a resource pool in the Microsoft Project Server tool. Aren't you really missing a lot of what Microsoft Project really does?

That's a very good question. Particularly when managing complex projects in the enterprise tool, you need Microsoft Project to calculate dates for you. Based on these dates and when tasks start and finish, Microsoft Project can tell you when the resources will be needed for work. It is this basic information that gives you a graph of overall resource commitment. Along with your schedule and resource allocation, Microsoft Project is also calculating costs, variances from baseline, and a host of other related information.

MPA: That makes sense. Now how about those dates I have to meet?

The key is in knowing how to tell Microsoft Project the information you have gained from doing your job. As stated in the earlier example, YJ is to enter a Constraint Type (Finish No Later Than), a Constraint Date (November 16th, 2007), and a Task Note describing the reason for constraining the schedule (good project management communication principles).

If you input information into Microsoft Project in this manner (YJ), Microsoft Project will communicate with you through the Planning Wizard and the Gantt Chart when a conflict arises (TJ) as shown in Figures 3 and 4:

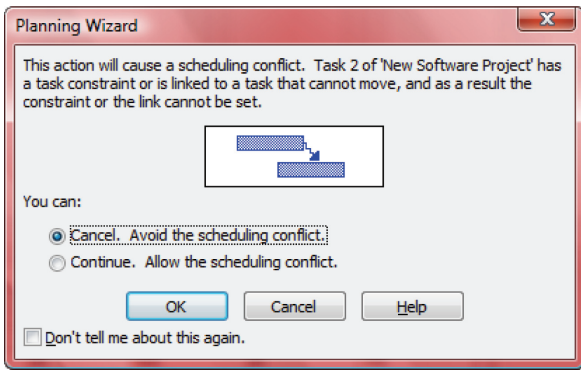


Figure 3. The Planning Wizard message regarding a scheduling conflict

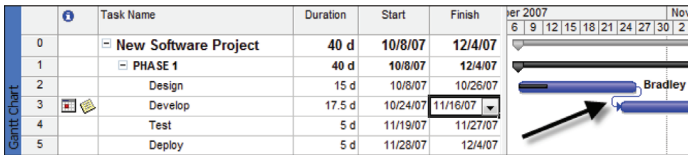


Figure 4. Gantt Chart view displaying a scheduling conflict

Your schedule is free to adjust as necessary, but Microsoft Project will let you know through the Planning Wizard if you have a problem meeting a commitment. At this point, it is time to do your job as a project manager by negotiating for items such as additional resources, deadline extensions, and/or a reduction in

scope all in an effort to bring the schedule back in line with client commitments.

To reemphasize, the tool's job is to inform you as to what will happen to the schedule, i.e. task start and finish dates, based on the information you have provided. Your job is to stay focused on good project management and communications principles in an effort to resolve schedule conflicts, and to allow Microsoft Project to manage task start and finish dates at all times!

MPA: What do I need to know about Microsoft Project to get started with YJTJ?

YJTJ is a mindset. There are numerous best practices we have developed for different scheduling/management scenarios that discuss which fields are YJ and which are TJ in each scenario. It is helpful to remind yourself that it is the Tool's Job to schedule tasks and think carefully about that as you work. If Microsoft Project doesn't do what you expected, the first question you should ask yourself is, "Did I just try to do the Tool's Job?" Your next question should be, "Did I give Microsoft Project all of the information it needs to reasonably do its job?"

The mindset is fairly simple, and is enough to get started. As you develop your skills and you work with more complicated projects, you will want to acquire additional modeling tools. You can do this through training, consulting, discussion with your fellow project managers, or by trial and error. The YJTJ

Continued on page ten

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MPA Interview - *Continued from page nine*

process goes much deeper, however, than what is required to simply get started.

MPA: What feedback have you received from people that have adopted this mindset?

Our number one point of feedback has been nearly universal. Regardless of whether people like or dislike Microsoft Project, they understand what to expect from it. Every level of management has been satisfied with the results from their unique perspective. We have numerous senior managers, resource managers, and project managers available for comment if desired.

We do admit, however, that for some people the first time they sit through the introductory YJTJ presentation they have trouble understanding how you could possibly use Microsoft Project without ever touching the task start and finish fields. We know, however, if they put the YJTJ principles into action, and even attend the introductory YJTJ session a second time, that they become believers. It is this belief and day-to-day practice that greatly assists organizations with achieving the primary critical success I hear so often: "Dan, you must get our project managers to a point of spending more time managing projects and less time working with and being frustrated by Microsoft Project."

Simply stated, YJTJ is a process that greatly assists organizations with realizing a positive ROI on their Microsoft Project investment!

MPA: Where can I go to get more information on applying YJTJ™?

YJTJ is a little bit difficult to explain in text; therefore, it is better to see it in action. If you are fortunate enough to have a DVD from the Microsoft Office Project Conference in 2006, you can watch the full introductory YJTJ presentation. If not, you can get a copy of a YJTJ presentation slide deck from the National Association of Technology Professionals (www.nwaitp.org). You can also send an email to YJTJinfo@MilestoneConsultingGroup.com to request information.

Please note that the introductory YJTJ presentation was initially created for what was known as the Microsoft Project Global Customer Advisory Council. Through four days of presentations, it was the top-rated session. This presentation has been received extremely well at MPA and PMI chapters in the United States, at Microsoft offices in the United States, and most recently at Microsoft in Israel. We highly recommend this presentation for MPA and PMI chapters around the world! Please note that the introductory YJTJ presentation will be delivered at the Microsoft Office Project Conference scheduled October 29 – 31, 2007, in Seattle, Washington. Any organization wishing to schedule the introductory YJTJ presentation may do so by sending an email to YJTJinfo@MilestoneConsultingGroup.com.

MPA: Thank You, Dan.

You're very welcome!

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Send Your Tracking Change Requests in Project

Bonnie Biafore, PMP, President, MonteVista Solutions, Inc. (MPA Member, Frontrange Chapter)

When a project doesn't run exactly as planned (which is most of the time), you update your Project file with actual values and sometimes adjust the schedule to get things back on track. But what about changes that people ask for—enhancements, requirements that weren't spelled out in the original plan, or new and improved approaches to project tasks? Change requests require the same care and feeding as the original tasks in your project, although transplanting them into your Project file sometimes requires a few extra steps.

This article describes ways to use Project to evaluate change requests in a Project schedule, so your change control board (or whoever approves change requests) can make informed decisions. You'll also learn how to add approved change requests to a Project schedule and incorporate them into your Project baseline so you can track them along with original tasks. This article also describes a method for identifying tasks that relate to change requests so you can easily put them in the spotlight.

Evaluating Proposed Change Requests

In all but the most laissez-fair change management processes, someone has to approve a change request. Predictably, approvers want to evaluate change requests before they say yes—why it's needed, how much it costs, how it affects the schedule, and so on. You don't want to gunk up your Project schedule with change requests that might not be approved. A what-if copy of your Project file is just the ticket; it shows the effects of change requests without a single change to your working Project file.

Note: Project 2007's multi-level undo (yippee!) is one way to play what-if games with your working schedule, but it has some drawbacks. Multi-level undo works only until you save your Project file. Approvals usually take time and keeping your Project file open for that length of time isn't realistic. However, you could make changes to a Project file during a change control board meeting and use multi-level undo to back out change requests that the board nixes.

A change request typically includes an estimate of the impact on schedule, cost, scope, and quality. Many change control boards approve change requests based simply on these estimates, for example, \$2000 and 2 days. For major change requests, such as adding a new model to the product lineup or a big project scope reduction, the impact requires careful study. If you want to see how change requests affect your project schedule, consider one of the following approaches:

- **One change request per what-if Project file.** The purest view of a change request's impact comes from adding only that change to a what-if Project file. Any date, cost, or other changes are the result of that change request alone. This approach is ideal for big ground-shaking change requests.

If you manage many small change requests, the overall impact may not match that of the individual change requests. For

example, the project finish date might not move very much if you can assign change requests to different people.

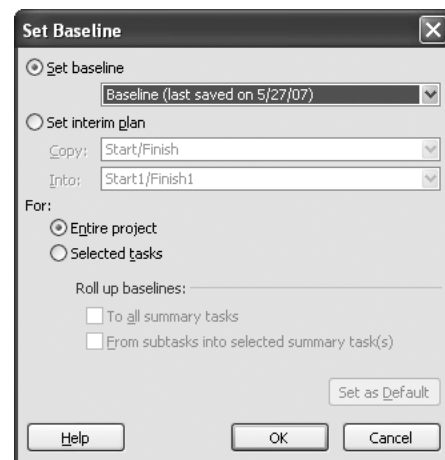
- **Recommended change requests in a what-if file.** Another approach is a what-if Project file that includes all the change requests you think should be approved—like the shareholder ballots that recommend how you should vote for corporate directors. The change control board might approve all the change requests if the schedule and budget are still acceptable.

Note: If you think the change control board is in a generous mood, you can create a second what-if file that includes all submitted change requests.

Copying a Project file to create a what-if file is a slam-dunk; choose File→Save As and give the what-if file a unique and meaningful name. For example, rather than naming a file *WaterlessIgloo2.mpp*, name it *WaterlessIgloo_CREval070630.mpp* or include individual change request identifiers like *WaterlessIgloo_CR462.mpp*.

Setting a baseline before you add change requests is the key to evaluating change request impact. You can compare the new dates, cost, and resource workloads to the pre-change request baseline. Here's a quick review of setting a baseline:

1. Make sure that the what-if copy is the active Project file. (The name of the active file appears in the main Project window title bar and appears in a darker color in the Windows taskbar.)
2. Choose Tools→Tracking→Set Baseline in Project 2007. (In Project 2003, it's Tools→Tracking→Save Baseline.)
3. In the Set Baseline (or Save Baseline) dialog box, choose the baseline you want to use in the Set Baseline (or Save Baseline) drop-down list and then click OK.



Don't select a baseline with a date to the right of its name, which means the baseline has already been saved. Resaving it overwrites the baseline values with the current values.

4. Edit the file to incorporate the change requests.

Tracking Change - Continued from page eleven

5. Use your favorite techniques to evaluate the impact of the change requests. For example, in the Tracking Gantt view, baseline task bars show the project before adding the change requests, while the current task bars show the project including change requests. You can see the variances that change requests generate by displaying tables like Variance, Work, or Cost in a Gantt view.

Setting Up Change Requests in a Project File

With those approved change requests burning a hole in your in-basket, you must add them to your Project file in order to track their progress. In addition to adding change requests to your working Project file, you must decide how to incorporate them into your Project baseline.

Adding Change Requests to a File

A what-if copy might be the quickest way to get change requests into a working Project file, but this approach works only if your working Project file hasn't been updated in any way. That is, you haven't added new actual values or edited the schedule in other ways. You can simply rename the what-if file and add any missing details like accounting codes or custom field values, and then rename the original and the copy. (Append “_Orig” or a date to the original filename, for example, *WaterlessIgloo_Orig.mpp* or *WaterlessIgloo_20071014.mpp*. Then, rename the what-if copy to the name you use for the working file, *WaterlessIgloo.mpp*, in this example.)

If your working Project file contains new information, you're better off adding change request tasks to the current working file. Use one of the following methods to include change requests:

- **Copy tasks.** If change requests are standalone tasks, you can copy the tasks from the what-if file into your working Project file.

In the what-if file, select tasks to copy by clicking or dragging across their task ID cells (the leftmost column in the table area of a view). Press Ctrl+C to copy them to the Clipboard. Switch to your working file (choose Window and then choose the file name). Click the row where you want to insert the tasks and press Ctrl+V to paste them. Project inserts the tasks above the row you select.

- **Modify tasks.** You can also incorporate change requests by editing tasks directly in your working Project file. For example, if a change request adds work and duration to an existing task, edit the task as necessary.
- **Remove tasks.** You don't actually delete tasks that a change request eliminates. Instead, change their remaining work to zero (0). This approach leaves the original baseline values in place, but shows the eliminated tasks as complete. Successor tasks can start earlier and you can reassign the resources to other tasks.

To edit these tasks, right-click the Task Form (in the default Gantt Chart view) and choose Resource Work. In the top

pane of the Gantt Chart view, select a task you want to “remove”. In the Task Form in the Rem. Work column (Remaining Work), type 0 and click OK.

Baselining Change Requests

How you baseline change requests in your Project file depends on how you want to track approved change requests. For example, if you have a hardhearted client who wants you to complete change requests within the original schedule and budget, you might want to keep your original Project baseline as it is so variances represent the divergence from the original plan. Here are three options for baselining change requests:

- **Adding tasks to a baseline.** If your change requests are new tasks, you can add those tasks to a baseline. (Select the tasks you want to add and then choose Tools→Tracking→Set Baseline (Save Baseline in Project 2003). In the Set Baseline (Save Baseline) dialog box, select the “Selected tasks” option.

For that hardhearted client, you want to set a baseline for your change request tasks, but you don't want to overwrite the original project baseline values. The answer is to turn on the From Subtasks Into Selected Summary Task(s) checkbox. With this setting, change request values update only summary tasks you select, for instance, only the summary tasks to which the change requests belong. You can review change request progress by comparing current change request values to their baseline values. At the same time, higher-level summary tasks show their original baseline values, so variances show any divergence from your original plan.

If you turn on the To All Summary Tasks checkbox, Project rolls up the new baseline values into all summary tasks up to the Project summary task. This is perfect when you want the Project baseline to reflect the additional cost and time that the change control board has approved.

Setting a new baseline. If a change request represents a major overhaul to your project, you can set a baseline of the project including the change requests. Then, you can track progress against this more recent baseline.

Choose Tools→Tracking→Set Baseline (Save Baseline). In the Set Baseline (Save Baseline) drop-down list, choose the baseline you want, select the Entire Project option, and click OK.

Note: If you want Project's variance fields to show the variances compared to this new baseline, choose Baseline in the Set Baseline drop-down list.

Saving a data cube instead of a baseline. If you don't want to use up one of Project's 11 available baselines, you can save your Project file as a data cube with the help of Project 2007 visual reports. A data cube saves a snapshot of project data into a special kind of database that you can view in Excel or Visio. You can use these data cubes to retrieve data by different categories, for example, to evaluate progress for change requests.

After you baseline change request tasks, entering actual values is the same for original, modified, or new tasks. Type values in

Continued on page thirteen

Tracking Change - Continued from page twelve

fields like Actual Work or import values from a time-tracking system.

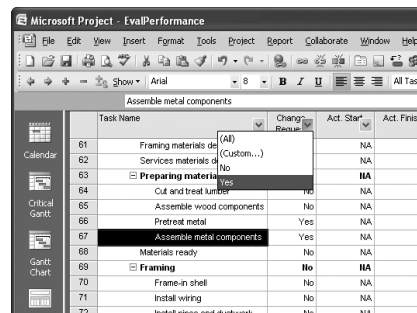
Highlighting Change Requests

Viewing change requests by themselves is useful when the project sponsor or customer develops amnesia about having approved a change. One way to spotlight change request tasks is with a custom field that flags them as change request. Then, you can filter a view to show only the tasks with the change request flag. Here are the basic steps:

1. Create a custom field for tasks. Choose Tools→Customize→Fields.

If you want to flag tasks by their change request identifier, use a text or number field. (Then, you can type the change request number or name in the field.) To simply track tasks as change requests, use a Flag field, which you set to **Yes** for change requests and **No** for original tasks. Name the field something like **Change Request**.

2. Insert the custom field into a table, for example, the Entry table of the Gantt Chart view, shown in the screenshot.



3. For every task that relates to a change request, type a value in the custom field.

The value would be **Yes** in a Flag field, but it could be something like **2008/01 CR** in a text field or **121** in a number field.

Display change request tasks by choosing Project→Filtered for→AutoFilter. In the change request flag column, click the down arrow and choose a filter value like **Yes**.

To remove the filter, click the down arrow and choose (All).

Certification - Continued from page one

scheduler, or another role that requires the ability to formulate well thought-out project plans and to manage projects effectively. Those pursuing this certification may be responsible for the scheduling, estimating, coordinating, controlling, budgeting, and staffing of projects.

- The MCTS: Enterprise Project Management with Microsoft Office Project Server 2007 certification provides industry recognition to project managers and other professionals who use Microsoft Office Project Professional 2007 and Office Project Server 2007 to manage and support projects in an enterprise environment. Candidates for this credential may use Office Project 2007 or Office Project Server 2007 to manage project and non-project efforts, risks, issues, documents, task progress, and timesheets.

The MCITP: After earning the MCTS credentials, students can then advance their project management career by achieving the advanced Microsoft IT Professional certification which is focused on Project Management as a specific job role. Enterprise Project Management with Microsoft Office Project Server 2007 certification provides industry recognition to project managers and other professionals who use Microsoft Office Project Professional 2007 and Office Project Server 2007 for individuals managing large and complex programs and projects throughout the enterprise.

Got Certification?

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that focus on metrics and team communication. They are looking to increase productivity and streamline operations with measurable results. In doing so, they are differentiating themselves from competitors and better accommodating their distributed workforces.

So now is a great time to take your project management career to the next level by investing in the Office Project 2007 certifications. No matter what type of Project Management role you perform, these certifications can benefit you and enhance your professional standing in the project management community.

Listed below, please find additional resources to help you learn more about the new Office Project 2007 curriculum and credentialing program:

- Join MPA⁷ and learn about Project / Scheduling www.mypma.org/mission.aspx
- Take the training from a Partner organization www.microsoft.com/learning/training/default.msp
- Take the MCTS Office Project 2007 70-632 exam www.microsoft.com/learning/mcp/mcts/project2007/pm/default.msp
- Learn about the upcoming MCTS and MCITP Office Project certifications
MCTS www.microsoft.com/learning/mcp/mcts/default.msp
MCITP www.microsoft.com/learning/mcp/mcftp/default.msp

1 PMI Network June 2007 / Volume 21, No. 6 Failure is Not an Option
2 The Standish Group's Quarterly Research Reports www.standishgroup.com/quarterly_reports/index.php
3 Project Management Institute www.pmi.org
4 Project Management Institute Certification Program
www.pmi.org/info/PDC_CertificationsOverview.asp?nav=0401
5 PMI Today (ISSN 1040-8754) published monthly by the Project Management Institute(PMI)
www.pmi.org/Resources/Pages/PMI-Today.aspx
6 Projects @ Work, May 22, 2007 www.projectsatwork.com
7 MPA The Official Industry Association for Microsoft Office Project www.mypma.org

“Got To Get You Into My List” – Part One

Ira Brown, President, Project Widgets (MPA President, Philadelphia-Delaware Chapter)

If you have ever worked with custom fields in Microsoft Project, you are probably familiar with the concept of a “value list”. Value lists are particularly useful for restricting the allowable values for a custom text field.

One of the challenges of administering value lists, is getting the list populated in an easy manner. Although it is possible to copy one value at a time to a value list, Microsoft Project does not provide the capability to copy an *entire value list* in one easy step. Similarly, you may also have the need to copy an entire value list *out* of Microsoft Project for use in a document or spreadsheet. Again, there is no way to grab the entire list in one step.

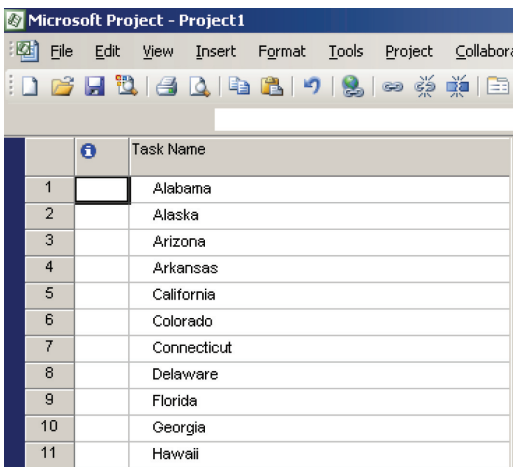
This is where Microsoft Project’s programming language, Visual Basic for Applications (VBA), can make this task a whole lot easier.

This article (Part One) will provide you with an example of using VBA to populate a value list. In the next edition of the Project Network, I will provide you with an example of how to extract values from a value list (Part Two).

Adding Values to a Value List

1. Start Microsoft Project, and from a new, blank project, either type or copy and paste the values you want to use for your value list in the “Task Name” column. This serves as a good technique for allowing you to programmatically populate a value list directly from a list of tasks.

In this example, I will show you how to create the code to populate the task Text1 field’s value list with the names of all 50 states.

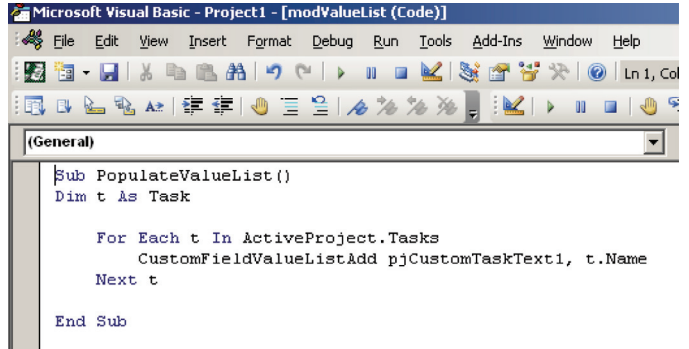


	Task Name
1	Alabama
2	Alaska
3	Arizona
4	Arkansas
5	California
6	Colorado
7	Connecticut
8	Delaware
9	Florida
10	Georgia
11	Hawaii

2. From the menu in Microsoft Project, select Tools... Macro... Visual Basic Editor.
3. From the menu in the Visual Basic Editor, select Insert... Module.
4. Type the following code in the module window, as pictured below.

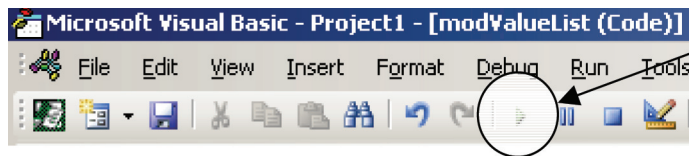
```
Sub PopulateValueList()  
Dim t As Task
```

```
For Each t In ActiveProject.Tasks  
    CustomFieldValueListAdd pjCustomTaskText1, t.Name  
Next t  
End Sub
```

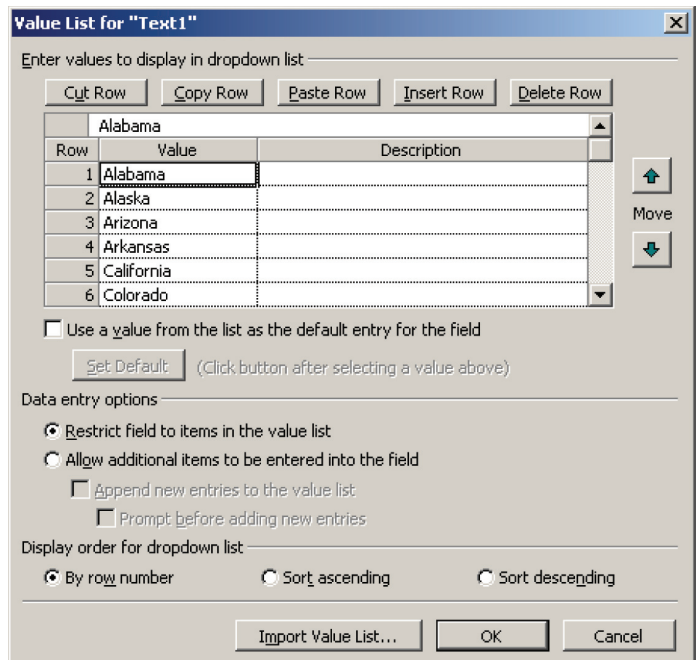


Note: Depending on the field whose value list you want to populate, replace the “pjCustomTaskText1” field with appropriate field constant. For example, to populate the value list for Enterprise Project Text10, you would use the constant “pjCustomProjectEnterpriseText10”.

To run the code, click the Run Sub/UserForm button, as shown below:



That’s all there is to it! As shown below, your value list is now populated with the names of all fifty states!



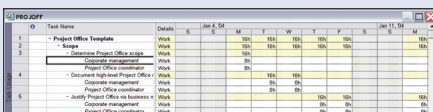
Working in Customized MS Project Assignment Views

Genea Mallow-Jensen, Manager, Enterprise Management, PMP, MBA ITT Systems, PMCOE (MPA Member, Frontrange Chapter)

One of the best ways to analyze and manage your resource loaded Project schedule is to customize (change the default configuration) the Task Usage and/or Resource Usage Views to meet your needs. These views bring together task information and resource information to provide assignment information.

First, we need to understand what we're seeing when we look at the assignment views. The Task Usage View, for instance, lists the tasks in the schedule. Below each task is a resource assignment which provides us with information only relevant to the assignment of that resource to that task. The Resource Usage View lists resource names and below each, in italics, are the task assignments for that resource. This view provides us with information only relevant to the assignment of that resource to that task. The task could have additional resources, more work hours, etc., but you will only see the hours of work for that single resource on that single task.

Let's take a look around... you can open any MS Project schedule with tasks and assigned resources. From the **View** menu, we'll choose **Task Usage...**



MS Project 2003 - P.O. Template, Task Usage View

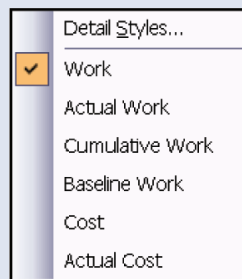
Notice the tasks have resource assignments. If you select an assignment and use the "Go to selected task" button from the Standard toolbar, the time phased grid on the right will take you to the date where the assignment begins.

Note: The *Task Information* button just became the *Assignment Information* button too!

"Work" in the right time-phased pane, is referring to scheduled work hours. Warning: Adjusting the hours in the white cells of the right pane can change the total work hours on the task, the duration of the task, and even the cost of the project.

The white cells in the right pane allow data entry, the yellow cells are summary cells. Making adjustments in the summary (yellow) cells may cause changes in your schedule that you do not intend to make and therefore, is not recommended. Changes should be made in the white cells.

Suppose we want to see other details in the right time-phased grid, like Cost. Just **right click** in the yellow area and choose Cost from the list. Now the right pane should show Work hours and Cost for that resource assignment, for that day, based upon the resource rate.



You probably noticed that Cost was not the only option when you right clicked in the yellow right pane. You can add rows for any of the elements listed or you can choose *Detail Styles...* from the top of the list to see all the elements available to add to your time phased grid. Just select the item from the list on the left of the *Detail Styles* box and choose **Show** and then click **OK** to add a row for each item in your timephased grid. Use the **Zoom In** and **Zoom Out** buttons to change the time phased grid to a weekly view, monthly view, etc.

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WBS Chart Pro - Your Next Project Reporting Tool

Al Callan, PMP (MPA Member, Puget Sound Chapter)

In September of 2006, Carl Chatfield, co-author of “Microsoft Office Project 2007 Step by Step,” was a guest speaker at the MPA Puget Sound Chapter (MPA-PS) meeting. The MPA-PS Chapter has the good fortune to be in the Microsoft neighborhoods and as such, gets added benefit of having guests like Carl speak at chapter meetings. Carl’s background and knowledge on the product is rivaled by few...remember, he wrote the book! And so, with Carl at the helm of his Project 2007 PowerPoint demo, I settled in with a fresh coffee (remember, this took place in Seattle) and waited for the curtain to rise on the Project 2007 feature set that piqued my interest most...visual reports.

Leading up to Carl’s presentation, I had, like so many others, spent my career using a desk-top version of MS Project. The nirvana of working with a Project Server instance was a distant reality. And, like many of my colleagues, I have always been challenged to leverage the canned reports of pre-2007 versions to communicate with my key stakeholders. So, over the years, I got creative and used other products like Visio, Excel and PowerPoint and Front Page to tell my Project story.

One of the many disadvantages of using disconnected applications as a reporting tool, is that they are not synchronized with the MS Project Data. So, any time there are changes in your MS Project file, you have to manually update the respective (Visio, PowerPoint, Excel, etc.) files. As I’m sure you know, that can be both extremely time consuming and frustrating. The value propositions that exist for Project Server and Project 2007 Visual Reports are the drivers for desk-top users getting creative to solve the problem with stand-alone applications.

And so, as Carl wrapped up his demo on MS Project 2007 visual reports, I was excited to get started with this awesome new capability. But for other non-2007 users in the audience, they still had the same old challenge. The solution, WBS Chart Pro, a product of Critical Tools, Inc. Ironically, I found out about this tool at the very same MPA-PS meeting that Carl demonstrated Project 2007! The product was demonstrated by our other guest speaker, Bruce Taylor. Bruce is a seasoned Project Manager experienced in large-scale construction projects, and the founder of MPA-PS.

According to the user’s guide, WBS Chart Pro is a “Windows-based project management software application that is used to create and display projects using a Work Breakdown Structure chart.”

Short of writing a nice lengthy product review, suffice to say, this tool is designed to interface bi-directionally with MS Project. I’d describe the tool as a visually strong and an easy-to-use WBS tool that can also be used as a display/edit interface with MS Project. And, oh yea, it’s extremely easy to learn. I ramped up in about 15 minutes.

For purposes of repeatability, I’ve used the MS Project 2007 template, “Software Project.” Inserted task 1 and indented all

other tasks. LEGEND: Blue = complete, Yellow = in progress, Green = not started.

Progress View

Figure 1 shows a progress view for the “MPA_SW_Project.” This simplistic, color-coded view of the project data is a very powerful tool for both analysis, and communication to executives. One of the beautiful features of this UI is that you can drill into detail on the fly. Do you see any problems with this project?

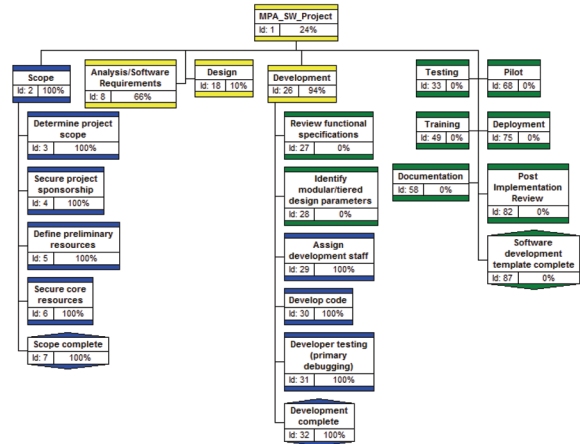


Figure 1. “Progress View”

Critical Path View 2

Figure 2 is the “Critical Path View 2.” This is an awesome view for activity definition and sequencing. You know, the fancy stuff that every good PM does per PMBOK. I like to print this view out in detail and hand it out to my teams, or send them an image file. It’s amazing how such pictures become the plan of record. I see people taping them to walls, carrying them around with them from meeting to meeting and really getting in touch with what a WBS is all about.

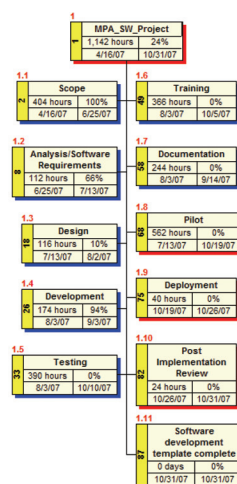


Figure 2. “Critical Path View 2”

The “Top Ten” Tips for New Microsoft Project Users

Michael A. Steinberg, PMP, Senior Project Management Consultant, Project Assistants, Inc. (MPA Member, Atlanta Chapter)

It seems that everyone today has a “Top 10 List”. So why would we want to have one for Microsoft Project? Well, think about these questions:

- How many of you have had formal training in Project before or soon after you started to use it?
- How many of you felt frustrated with Project not behaving like you expect it to?
- How many of you are able to get the tool to do what you want every time?



In my experience of training, mentoring and consulting with users of the tool, I have found very few people who can answer positively to all of the questions above. But, I have found that with the proper training, and understanding of a few simple rules that govern the tool's behavior, users' frustration levels can be drastically reduced.

This article is by no means intended to replace formal training, but it can be used as a refresher, a reference, and a set of guidelines so that the tool becomes the project manager's friend rather than a source of frustration.

So, here is my “top ten” (actually twelve) list of tips, guidelines, or “rules” for understanding how Microsoft Project operates.

I. It's not a spreadsheet

This may seem obvious, but it's worth a mention. A new user may look at the grid-like layout of the default “Gantt Chart” view and assume that because it looks like a spreadsheet that it also behaves like a spreadsheet. They quickly discover that the tool automatically performs some scheduling functions, like, for example, changing start and finish dates. Not understanding how or why it does this, they quickly become intimidated and abandon the tool. The bottom line: Project is a scheduling tool. Scheduling tools will change dates!

II. Know the basic scheduling formula

Duration = Work/Units

Understanding the definition of these three terms (See Project Help), as well as the formula itself, is key to knowing how Project schedules a task. To anyone who has changed any of these three parameters on a task, without understanding this formula, the changes that Project makes to the other parameter(s) can sometimes seem totally unexpected or bizarre.

In my experience, not knowing this formula is the biggest cause of frustration that people experience with the tool. Knowing the

formula will not stop Project from doing things that you don't expect, but it will allow you to know what changes to make so that it will do what you want.

III. Use Task Types correctly

What will Project do when you change either work, duration or units on a task – that is, which of the others will it change and which will it keep constant? The Task Type parameter is what tells Project how to behave. The general rule is:

If work, units or duration is fixed and you change one of the others, Project will recalculate the third, but won't change the one that's “fixed”.

Even if you don't set Task Type explicitly, each task defaults to one of the three – and the system default is “Fixed Units”. This can cause problems in many cases, because since most technical tasks are driven by the amount of work effort required, they should generally be “fixed work”.

IV. Estimate work, rather than duration

As mentioned in the previous tip, most technical tasks are driven by the amount of work effort, not by duration. Therefore, it is a good practice to estimate how much heads-down work effort a task is likely to need, and estimate the number (or fractions) of resources (which is the definition of units), and let the tool calculate duration.

Duration is dependent on many things – not only work effort and assignment units, but calendars, task splits and a number of other factors. Often, when we estimate duration first, we are really applying the basic scheduling formula (Tip number 2) in our heads. Why not let the tool do the math!

V. Understand effort driven

If a task is effort driven, the total task work will remain the same if you add or remove resources. If you add a resource, the total amount of work effort will be divided among all of the resources, including the new ones, thereby reducing duration.

A good practice when adding resources to a task, even if you do understand this concept, is to *explicitly* specify the work and units for each assignment, so you remain in control of the division of labor. Do this in a usage view or the bottom half of a split-screen view.

VI. Don't assign everyone at 100%

When you assign a resource to a task, the default level of “assignment units” is 100%. This means that the resource will be assigned full time on that task for its entire duration! Is that what you always want? Probably not, but it is easy to fall into

Continued on page eighteen

Top Ten Tips - *Continued from page seventeen*

that trap. This will result in a serious distortion of their true allocation. Be especially careful when people are assigned to concurrent (parallel) tasks. Be sure not to assign them full time in these cases.

VII. Minimize constraints

Constraints, such as “*Start no earlier than*”, or “*Finish no later than*”, are really telling Project not to schedule a particular task. Sure, there are legitimate uses for them, such as a dependency on a truly external event. However, the best practice is to estimate each task and its dependencies, and let Project adjust the schedule. This is called “Dynamic Scheduling”.

Hard (or “inflexible”) constraints such as “*Finish no later than*”, should be avoided if possible. Hard constraints can cause scheduling conflicts, where Project may be forced to choose to ignore either a constraint or a dependency – again, a situation where you are tying one hand behind its back.

“What if my sponsor mandates an end date?” you say. Use deadlines instead. Deadlines will flag a missed milestone but will not disable scheduling of the task.

One note about constraints: When you manually key in a start date, you are effectively setting a “*Start no earlier than*” constraint. That is why project sometimes ignores a date that you type in.

VIII. Avoid estimating percent complete

Estimating percent complete is not a best practice for many reasons, not the least of which is its vulnerability to abuse. A better practice is to ask a resource (or manager) to report actual work and to estimate remaining work, and let the tool calculate percent work complete. (In fact, when we estimate percent complete, aren't we really mentally estimating those two amounts and doing the math in our heads?)

Another note: In Project, the “% Complete” field really means “% **duration** complete”, as distinguished from the “% **work** complete” field. Make sure you understand the difference and which you want to use.

IX. Heed the planning wizard

Yes, those annoying messages like “This action will cause a scheduling conflict...” are really your friend. They warn you of potential problems, like the one described in the previous tip. Deal with them immediately, because their consequences may become more difficult to trace back to their root causes when they are no longer fresh in your mind.

X. Leveling is not a magic bullet

As anyone who has used automatic leveling knows, there is really no magic to it. It simply delays the start (or continuation)

of tasks in your schedule until resources are no longer overallocated. This is not always practical.

The best practice is to use some thought when first assigning resources to tasks. For example, don't assign the same person full time to two tasks at the same time. If you are careful, leveling can work for you. If you are not, it is sure to make things worse!

XI. Tools do not replace communication

With all of the collaboration tools in the Enterprise Project Management (EPM) environment, like notifications and SharePoint, one might be tempted to think the tool can communicate for us. *Wrong!* Ninety percent of a project manager's job is interpersonal communication. EPM tools will facilitate communication and relieve us of some of the more mundane tasks so we can spend more time communicating – but it won't replace it.

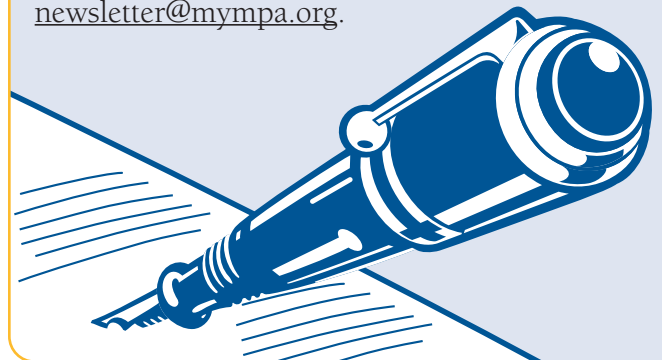
XII. Tool expertise will not make you a good project manager

This point expands on the previous tip. Microsoft Project is a great scheduling tool. But that's all it is. PMI® identifies 44 processes that a project manager performs. Project really only supports a handful of those processes. As they say, “a PM tool makes a good manager better faster and a bad manager worse faster.” Microsoft Project will facilitate some of our more routine scheduling tasks, so that we can devote the bulk of our time truly *managing* our projects.

Special thanks to Dr. Fred Oettle, Director of Training at Project Assistants for articulating these concepts.

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Microsoft Project Server® and Microsoft SharePoint®: The Building Blocks to an EPM Solution: Part One of a Series

Nicholas Pisano, President and CEO, Safran North America, B.S, M.S., M.A. (MPA Member, New Mexico)

The traditional definition of Enterprise Project Management (EPM) is “the field of organizational development involved in the management of change involving either significant transformation or a new development”. Under this concept, management is usually achieved through the establishment of a project or program discipline focused on the individual project or program.

This definition, became inadequate and obsolete with the introduction of more sophisticated information technologies and organizational methodologies of the late 1980s and 1990s. As the potential for greater access to and integration of information generated by the information technology itself increased, it created a demand that outstripped the technology that existed at any one time.

For example, in the United States public sector, particularly in aerospace and defense, highly formalized and disciplined program management controls were instituted on projects related to new technologies and weapons systems that involved significant resources and risk. These systems typically involved between tens of millions to tens of billions of U.S. dollars. As such, structured management systems were put into place in order to ensure that adequate control was exercised to achieve effective management of existing resources and to safeguard the expenditure of the public money in the government’s oversight role.

In commercial industries, given the plethora of “best of breed” solutions tied to business sub-cultures, there developed a need to integrate information both vertically and horizontally across the enterprise from disparate systems. This synthesis was used to anticipate corporate performance, particularly in reaction to the widespread practice in the 1980s of project sub-optimization at the expense of the entire enterprise.

In recent years, beginning with the near-universal acceptance of scalable technologies based on the 32-bit flat address space, notional concepts of portfolio management and distributed management across the enterprise utilizing existing information resources has become a reality. In the early 1990s, the focus was on the individual project, usually organized in an hierarchical model based on its strategic importance, cost or risk to the enterprise. EPM now has come to mean the ability to manage all projects across the enterprise and to integrate previously stove-piped, organizationally-based metrics into an integrated system. The system allows for the conversion of raw data into information that allows managers to aggregate that information at the appropriate organizational level in real time.

The reason for the demand of this type of organized information is obvious: an organization can only apply a finite level of resources to its projects. Projects have always tended to compete for money or personnel. The competition for these resources often resolved themselves through “politics”, in which the force of personality of the individual project manager played a role or for some other anecdotal reason, created a situation in which the decisions were made and the ramifications were only vaguely understood. For example, in matrix organizations, personnel resources are applied to projects in such a way that individual

assets and skills must be shared. Unless all of the entities within the organization that rely upon such expertise are identified and included in our system, we will continue to make decisions ad hoc without understanding the impact until the risk from such a decision has manifested itself. This is oftentimes called portfolio management as opposed to individual project management. The information in the latter systems must roll-up in a meaningful way for the information contained in the former to be valid and of any value to the organization. Thus, the terminology EPM is the more appropriate to this vision.

In order to facilitate EPM, an organization, regardless of its size, must establish what has often been called in IT Governance parlance, a project management system. This system is constructed apart from and prior to, choosing the specific technological solutions. This system consists of a set of processes, methods and procedures that must first be established as a best business process, as if technological resources would otherwise not be available. Typically, these systems will be based on a standard model such as the PMBOK, PRINCE2 and, in earned value-focused organizations, the ANSI 748 guidance. Smaller companies and organizations may tend to develop a proprietary discipline based on a scaled version of these principles, resources applied and risk undertaken.

The essentials of this system involve processes that must be in place in order to ensure adequate management and control. At this stage, the focus for these processes is still at the individual project level. These are:

1. Assignment of Work
2. Identification, definition and scheduling of work
3. Allocation of baseline resources and accounting of material and costs
4. Analysis of performance for cost, schedule and technical achievement
5. Control and documentation of changes to the baseline and/or scope

Any software application or group of applications, must be able to facilitate this flow in order to support the business processes selected by management. Though there will always be variations in individual implementations, the goal of the systems analyst or consultant should be the same: Recommending solutions should be geared to resolutions that meet the overwhelming majority of organization requirements without modification. This is what I call the 80% solution. The goal is to provide an integrated solution that meets the basic requirements for functionality. Complexity can always be introduced into the solution based on the localized business environment.

Given this vision, the next step is to come down from the 20,000 foot level and illustrate in detail that functionality in Microsoft Project. We will then illustrate the manner in which Microsoft SharePoint fulfills the EPM role as an effective open system, creating an enterprise-level business intelligence solution. The next part of this series will address the Microsoft Project Professional and Project Server portions of this discussion, while SharePoint will be the main topic of part three.



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