TIPS FOR DEPLOYING PROJECT SERVER

By Dr. Waffa Karkukly, PMP, ACP

Abstract

Implementing any software requires planning, executing, and controlling. This translates into deploying the right skill sets, at the right time while understanding the scope and objectives to ensure the delivery of the desired outcome per client's satisfaction.

Although the three successful elements of projects; people, processes, and tools never change regardless of whether the project is internal or external to the organization the measure of scope, time, and budget is the same. The trend is if a solution is being deployed for external entities, there is a strong attention to the way the project is being run; this neither is necessarily true for internal entities.

The objective of this article is to share Project Server implementation practices that work whether an organization is planning to deploy, about to deploy, deployed, or planning to upgrade to the next version.

Key Words

Project Server, EPM, Implementation, Project Management

Introduction

In today's industry's shift towards managing the organization by projects, project and program management, organizations require the same three elements (people, processes and tools) to be successful. The lack of any of these elements will result in issues that impede organizations' effectiveness. The dynamics and synchronization between these three elements will affect the success of the project management office implementation.

Implementing project tools is one of the key elements to any PMO's success, effectiveness, and continuity. As the expectation of what the PMO should deliver grows in organizations and in the industry, PMO's will require the right mechanics to gather the right data that will enable performance measurements; hence, better decision making ability. There are many great tools out there that allow any PMO organization to perform all required project, program, and portfolio planning, monitoring, and control. Project Server , or known as EPM (Enterprise Project Management) is one of these great tools that allow an organization to build world class project solution to support organizations' people and processes.

Things you need to know when deploying Project Server

Project Server deployment needs to be taken seriously and managed as an organization would manage SAP, Oracle, etc. The reason for this emphasis is due to that some organizations or leaders within some organizations view Project Server as a project tool that will not generate the dollars that an external implementation would. Some may think that what is so difficult about deploying any project tool, it is another internal tool similar to that used for system performance or issue tracking, etc. The benefits that Project Server provides an organization is far more sophisticated than a desktop standalone project scheduling tool can do. The depth and strength of Project Server requires the right understanding and the proper planning.

1. Understanding the organization's requirements:

Understanding these collective requirements crosses through the entire organization and goes into multiple dimensions. What are your CIO's requirement, your CIO's direct report requirements, your project managers' requirements, your PMO's requirements, your business partners' requirements, and technology's requirements (what functionality to turn on or off and why). Gathering and understanding requirements needs to occur regardless if an organization has a Project Server environment or not, the focus of these requirements will differ. While in a new environment, all the requirements mentioned

previously should be considered of today's organization project practice and processes in place to determine what stays and what goes.

In an environment where Project Server exists and an organization is looking to upgrade, the focus should be additional functionalities an organization will benefit from and what does it mean to the overall processes and data migration.

2. Proper planning of the Project Server implementation:

The implementation should not be taken lightly. Planning the right resource, the right training, the right architecture and security model, and the potential integration with other applications must all be considered upfront. Below are the detailed steps for planning and executing a Project Server implementation.

Breaking Down Your Implementation

1. Pre Implementation Phase (Planning your implementation) Build multi dimension requirements as advised above (Executives, Project Managers, PMO's, technology) and then follow the bullets below

- Assess current project practices (does the organization use Excel for project tracking, project professional on their desktop, or other home grown tools)
- Assess and plan project processes (drivers and triggers to approving plans, creating plans, tracking plans, archiving plans, etc)
- Plan server(s) architecture, security access, network specification, etc (How are the servers structured, connected, distributed, etc)
- Build any reporting requirements (prioritize what information is required out of the system for all the dimensions in your organization)
- Build a robust test plan that will cover functionality as well as operate in light of the processes established.

- Build a project conversion plan. This may require re-creation of some projects, or clean-up of others depending on the tools used to create projects and the discipline that was followed.

- Build a cutover plan of when the system will go live with all the converted plans.

- Plan building a Project Server test environment immediately after Project Server in production or preferably in parallel

- Staff the right resources (SME) whether internal to the organization or experienced consultants

- Plan your on-going support model

- Build training and rollout plans. The training should include many tracks; Project Manager Track, team members track, resource managers track

If this is something an organization is taking on for the first time and does not have the SME (Subject Matter Expert) within the organization, I would recommend engaging an experienced consulting firm who has proven experience with similar work. In case your organization already have an existing EPM environment, similar considerations to the above pre-implementation practice for Project Server will still apply. The items below are specific to an existing environment planning.

- Revisit and validate current requirements, internal processes, and current project practice (i.e. create, publish project, global template, custom fields, RBS, etc)

- Build any new technology specification, server architecture plan, security plan, and network plan that might be required due to the new changes.

- Build installation and configuration plan

- Build a migration plan, cutover plan. It is important that you have a number of plans in the system to orchestrate the migration and cutover and it is important that it is done during down time and in non project maintenance days.

- Re-visit your current support plan

- Build specific training and rollout plan. This will need to focus on the added functionality, new processes and practices that the organization will need to learn.

2. During Implementation (Execution of the plan) synchronizing the pieces of work especially if a vendor and consulting firm is involved is crucial

- Setup the architecture per the architecture plan. Set-up and configure the production servers' environment and test servers' environment
- Install, configure, set-up security, project parameters.
- Build out RBS, outlook options and turn on all required functionalities
- Migrate data. This is a critical step. Work with the various project managers on standardizing, cleaning up their plans before moving it to Project Server.
- Testing will need to be coordinated outside of business hours
- Rollout training and provide a go to place for support and fielding questions

The execution addresses when, how many, medium of training, documentation and material provided, on-going knowledge for current employees and the new ones joining. Rollout the system and synchronize the first time timesheet acceptance process and project tracking and maintenance process. First report generation is very important to start managing and measuring projects by the information provided.

In case your organization already have an existing EPM environment, similar steps apply, with attention to specific steps to existing environment

- Migrate data. This is a critical step now that there are numerous plans in the repository. Ensure plans are cleaned and have no open issues needs to be addressed prior to migration.
- Rollout the system synchronizing the time acceptance process.

3. Post Implementation (after completion of rollout) the success in carrying out this phase will determine level of adoption and acceptance of EPM in the organization

- Immediate monitoring for post implementation issues
- Lesson learned for the project team
- Satisfaction survey on the rollout and training
- On-going support per the documented process and procedures
- Monitoring time sheet entry and acceptance to ensure compliance

- Assess further organizational reporting needs and effectiveness of the current.
- Creating various learning and how to (aka. Wiki's, blogs, sharepoint, newsletters)
- Hold frequent refresher and orientation for new employees requiring EPM's use.

Benefits of Project Server to an organization

The benefits to implementing a project tool is seen across the organization at the various levels. The benefits may differ in nature in how it serves the various audience using EPM; nevertheless, everyone achieves benefits that improve their project operation, monitoring and controlling.

For PMO and Organization Leaders

- Visibility into process compliance through exception reporting on new project assignments for departments and cross functional projects
- Availability of historical data on staffing model for similar engagements which promotes best practice
- Ability to compare actual associate utilization by project owners against assigned allocation at department /Project Sponsor Level
- Insight into time spent on ad hoc, change control and support initiatives
- Visibility into resources assigned to projects and their utilization

For Project Managers and project teams

- Project Managers are in better control of the day-to-day activities of a project, e.g., time reporting, changes to resource allocations, re-scheduling tasks, and reporting status.
- New monitoring tools that provide the information necessary to track and report on important project metrics
- Overload situations are highlighted, and minimized, by having a true, holistic picture of team member availability (including scheduled administrative time) which promotes more balanced assignments

- Clarity around "who is doing what" and simplified time reporting – team members are assigned to tasks in Project Schedules and can report time only to those tasks assigned

- Visibility and tracking of specific task assignments and performance on completing those tasks supports associate evaluation and recognition

Conclusion

A project organization needs to have people with the right skill sets and processes augmented by Project Server to improve managing and controlling resource allocation, budget, etc. The depth and strength of Project Server is manifested by first, the tool itself for the various functionalities and capabilities it has; second, for the process carrying out the implementation having proper planning, flawless execution, and attending to all audience through appropriate post implementation procedures to ensure success, minimal resistance to new tool, and continuity of projects, resources, budgets monitoring and control.