

# Implementing Microsoft Project And Project Server

## HMS Software's **Rapid Adoption Framework**<sup>TM</sup>

# Microsoft Project Rapid Adoption Framework

Implementing Microsoft Project and Project Server as an enterprise project management system involves more than just the installation of the software. The Microsoft epm Solution is so flexible that the decisions on what aspects of project management to build the project management environment around can influence the degree of success in the deployment. Working with Microsoft, HMS Software has designed the *Rapid Adoption Framework™ (RAF)* designed for mid sized organizations of 100 to 2000 employees to design, install and configure a Microsoft Project Server based system and to train a core group of users in its use.

The Rapid Adoption Framework is based on the EPM Adoption Framework materials created by Microsoft for large-scale Project deployments. In the Rapid Adoption Framework, HMS consultants and trainers will deploy the basic Project Server system in only two weeks. This structured methodology includes creating a vision for the EPM solution, planning its design, installing the Project Server software and training a core team consisting of an Administrator and up to 10 project managers in the use of the system. The schedule for the RAF is:

Rapid Adoption Framework										
Pre-Day	Day 1	Day 2	Day 3	Day 4	Day 5	Day 6	Day 7	Day 8	Day 9	Day 10
Prep										
	Envisioning/Planning									
			Installation							
					Admin Training					
							PM Training (Project Pro/Web Access)			

## Preparation Day

An HMS consultant will interview at least one person from the organization's project implementation team to prepare for the Envisioning/Planning workshop day scheduled on Day 1. A checklist of questions will be sent to the organization in advance to prepare for this interview. The more information about the structure of the organization that we can give the Workshop facilitator, the better the quality of the workshop. Also checklists for IT infrastructure are completed by the organization's IT personnel.

## Envisioning Planning Workshop, Day 1

This facilitated workshop has an experience Business Analyst from HMS and an assistant work with key executives and members of the Project deployment team to build a common vision for the epm solution. It is this vision that will empower the design and implementation work. Once the vision work is completed, part of the day is dedicated to designing a solution using Microsoft Project and its components to meet the vision agreed upon. HMS will spend time in a day following the meeting to document the results and create an EPM Vision document.

## Installation, Days 3 and 4

HMS Technical personnel will install Project Server and at least one Project Professional and ensure that the system's functionality is all working properly.

## Training, Days 5-10

An HMS consultant will train a Project Server Administrator while configuring the system for basic use and then HMS Training personnel will train up to 10 project managers in the use of Project Professional and the Project Web Access interface. All basic functionality is covered.

At the conclusion of the two week cycle, the basic Project Server system has been installed, is functional and ready to store new projects. Also, a core team of project managers will know how to use the basic functionality of the system and can begin to train new users in the use of the Project Web Access interface.

### **Additional Modules**

Although all the basic functionality of Microsoft Project and Project Server will be active at the completion of the RAF implementation, some organizations will then wish to extend the capabilities of the epm solution, HMS has designed a number of additional modules that can be adopted as required. Each of these modules delves into a particular subject more in depth and includes within it its own envisioning and planning exercise. Within each additional module, there is a focused envisioning and planning process followed by a configuration phase and a training phase as appropriate. Some of these modules include:

#### **Advanced Collaboration (5 Days)**

Microsoft Project Server includes extensive functionality to create a collaborative project management environment. In particular, the link to Windows Sharepoint Services provides remarkable opportunities for the project team to interact. The Advanced Collaboration module delves into this area of your epm system with a focus on: Managing and customizing the Sharepoint Project Workspace, document management issue and risk management, email notification and Outlook integration. Additional time may be spent on modifying the Project Web Access interface by adding menu items or changing the home page.

#### **Advanced Portfolio Management (5 Days)**

Project Portfolio management is a hot topic these days and this module exploits Microsoft Project and Project Server's capabilities in this area. Time is spent on creating views using enterprise fields, using the Portfolio Modeler, creating Portfolio Analyzer reports and, creating a scoring system for a 1-line per project view in a project stage-gating environment.

#### **Advanced Resource Management (5 Days)**

Resource Capacity Planning is a common goal for many enterprise project management implementations. In this module, we focus on Project and Project Server's resource functionality including how to create a proper RBS (Resource Breakdown Structure), proposed vs. committed resource booking, resource reporting, dealing with environments where not all work is detailed in the system or not all resource availability is exposed and working through the resource capacity decision making process.

#### **Advanced Reporting (5 Days)**

The capabilities of reporting using both Project Professional and Project Server are extensive. This module focuses on enterprise level reporting using Project Server including how to create new reports, how to use customized fields, how to change Barchart views, creating reports using Portfolio Analyzer and extending the Portfolio Analyzer cube for more extensive reporting. Additional topics may include how to use external reporting systems to access Project Server's data.

#### **Security (5 Days)**

Project Server provides a highly secure environment with many options for customization. This module focuses on access to the system, creating an outward-facing system, restricting functionality, restricting data access and restricting views. Areas of interest may also include integration with Active Directory and securing the SQL Server database.

#### **Linking to other Line of Business Systems (5 days)**

You can link to Project and Project Server data in several different ways including through Project Professional, directly to the database or through the Project Data Services API. This module will focus on what should and should not be integrated and then assist with the design and deployment of actual system links.

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## About HMS Software

HMS Software, a division of Heuristic Management Systems Inc., is a wholly Canadian-owned company headquartered in Montreal with additional offices in Toronto, Canada. Since its inception in 1984, HMS has specialized in the automation of project control environments. Its commitment is to provide project management solutions to organizations worldwide.

Founded as a consulting firm, HMS Software has maintained its technical orientation throughout the years. Staff in all areas of the organization, from Marketing to Technical, have in-depth knowledge of project management and the enabling technologies that make our automated solutions possible. HMS's offerings include project management software, training, consulting and technical support.

In 1994, HMS Software launched *TimeControl*<sup>®</sup>, a project-oriented timesheet system designed for organizations that need to track project labor hours. TimeControl is now being used by major corporations worldwide.

HMS has been part of the Microsoft Project Solution Provider program since 1995 and is now recognized by Microsoft as a Premier Microsoft Project Solution Provider. Our technical and development staff are given early access to new releases of MS Project so we can ensure that our implementation staff is ready to assist you as soon as a new version has been released.

Through its offices in Canada and a network of agents and distributors throughout the world, HMS Software is able to provide technical expertise, high-quality consulting and training and, of course, software to project organizations worldwide.

HMS Software is proud to count among its clients some of the world's major corporations including: Motorola, Bombardier, CAE, Credit Suisse/First Boston Bank, Duke Energy, Ericsson, EXFO, Kelly Services, Mercury Marine, Motorola, Rolls Royce, Standard Life and the Toronto Transit Commission.

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**HMS Software can help your organization move rapidly to deploy enterprise project management.**

**Problem:** Your organization is committed to implement enterprise project management but you wish to move quickly.

**Solution:** Let HMS deliver the *Rapid Adoption Framework* assistance program. In two short weeks, you will have articulated a vision for your epm system, Project Server will be installed and a core team of users will be trained and ready to use the basic system.

**Problem:** You want to deploy Project Server but you want to ensure the installation and initial configuration match Microsoft's standards for an epm solution.

**Solution:** HMS uses a team approach to deliver highly trained consultants, technicians and trainers. These personnel have all been trained using the latest materials and instruction from Microsoft itself. You can be assured that when you use a Premier Microsoft Project Solution Provider like HMS Software, you are receiving the very best service available.