

# Enterprise Project Management Technology Whitepaper

By Ted Barth, Managing Partner BNW Manufacturing Associates LLC

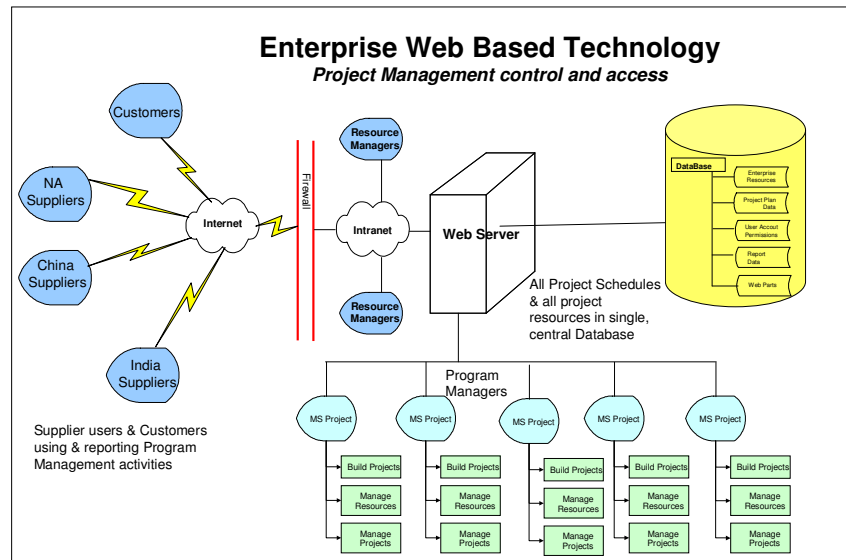
## Introduction:

Project driven organizations working in complex program management organizations can find simplification, communication, and integration benefits through a move to Enterprise Project Management technology. Most organizations in US Industry today manage or attempt to manage their projects and programs utilizing standalone MS Project and standalone MS Excel spreadsheets. In those organizations with multiple project managers, the use of many standalone files with data which resides on multiple computer hard drives causes redundancy, laborious efforts to integrate and consolidate project information, and serious lack of visibility.

One of these challenges-- the heavy use of MS Excel spreadsheets for project planning and tracking, can be attributed to the myth that MS Excel can/ will provide forecasts. This myth is dispelled in the BNW "Forward Scheduling Forecast" whitepaper. However, when MS Project Standard is utilized, it has the weakness that each project file resides on a unique computer hard drive--- making consolidation of multiple project / multiple resources considerably more laborious and normally unattainable due the heavy dependence on laborious and procedural methods. When an organization chooses to have consolidated and summarized information—summary of all projects; resource and capacity management graphical forecasts; and activity reports by resource manager/ work center--- it is time to move from MS Project Standard to MS Project Professional technology.

## Enterprise Project Management Technology (EPM)

The most advanced technology – MS Project Professional—is in reality the same exact project driven functionality as MS Project Standard for scheduling, resource & capacity management, and cost management--- but puts all the multiple files into a single database that can provide web based information. This technology is commonly called Project Server/ Enterprise Project Management (EPM). The



process of learning how to utilize this technology is straightforward since the total functionality overall is 90% the same as MS Project Standard with the 10% being how to use the EPM features. The adjacent diagram shows how the multiple project managers save and publish each of their project data in a central database--- allowing the entire "enterprise" to see and use the data, including exports to MS Excel, Word, Powerpoint, and Visio.

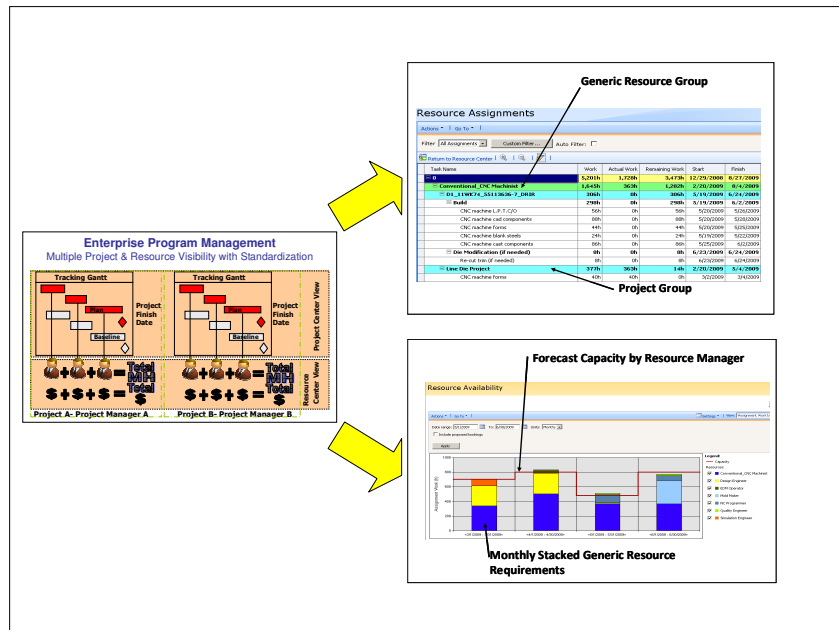
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As shown in the diagram, project managers can save their project data to the central database, they can “publish” that saved data to the web so all enterprise stakeholders can have access to the data in a variety of report formats. Notice that the web data can be made available on the organization’s intranet web internally or on the organization’s internet website externally. Typical external web information is for customers, for suppliers; and for executive /program manager stakeholder information access while travelling.

## Resource & Capacity Management

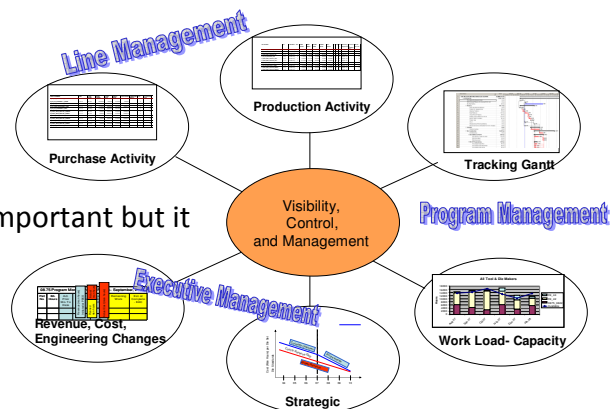
One of the most effective use cases why organizations choose Project Server is the development of Resource and Capacity Management capabilities. In this more advanced project management maturity stage, all resource requirements for multiple projects are saved in the central database—regardless of the multiple project managers that develop those projects---and a central standard pool of generic resources with resource work calendars reside in the central database.



The consolidation of project resource requirements and resource capacity allows Project Server to automatically generate time based requirement and capacity forecasts in dashboard views and exported MS Excel views in tabular and graphic form. This allows organizations to implement resource and capacity management on a one to six month planning horizon. See the adjacent diagram showing this standardization and web based visibility view concept. For more detail in integrating resources, capacity, and schedules, refer to BNW whitepaper- “Integration of Project Resources and Schedules”.

## Reports & Dashboards

The key to high performance projects is for management to have accurate and timely project and program information. Not only is information important but it is critical that management have reliable forecasts of project schedule, resource, and cost information to come. When management has reliable forecasts and the information is readily accessible in



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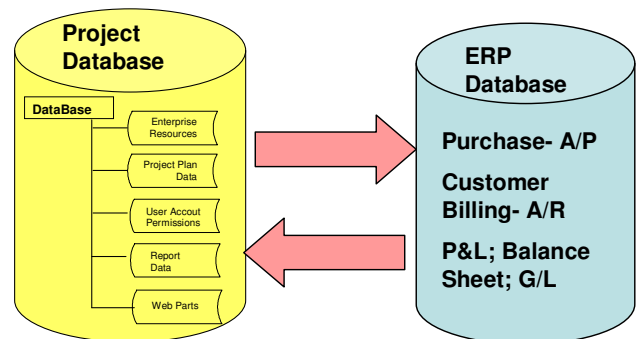
reports and dashboards--- management then has the unique ability in process in the project to direct corrective actions on troubled projects and areas before the project phase or project finish is completed--- thereby wringing better project performance. The enterprise project management technology with its web based access upon demand to reports and dashboards—has this capability—see adjacent diagram.

## Other EPM Features

Project Server has other enterprise wide features that can make organizations more efficient and more effective benefits—security access controls and document management. The Security access control can be as simple (seven default user groups) or as sophisticated (create your own user defined user groups) to read, read write, or no data access. This capability is as sophisticated as the most advanced ERP (Enterprise Resource Planning) system. The document management capability is a web based tool that allows document storage of word documents, spreadsheet documents, photos or pictures, drawing files, and engineering change documents. This tool named “Sharepoint” also can have pre defined and standardized directories; controlled or uncontrolled documents; ability to create one unique or multiple unique document templates; email event notification; and capability for each project manager and their team with automatic access to project specific documents in what is called “project workspace”. An article in the Wall Street Journal titled “Microsoft Embeds Sleeper in Business Software” heralded this technology a leader in U.S. Industry for collaboration.

## Line of Business (LOB) Integration to ERP/ Legacy Business Systems

Lastly, a single database containing all project data--- scope, schedule, resource, and cost allows the integration of that data with other business systems and their single database. The most common integration to other business systems is an ERP (Enterprise Resource Planning) business system that provides the organization engineering, manufacturing, purchasing, and accounting/ financial (A/P; A/R; G/L; P&L; and Balance Sheet) functions. ERP business systems traditionally have not and currently still do not perform nor account for project management activities in a robust manner. Once a project management data base like Project Server and an ERP data base both have been implemented, integrating LOB (line of business) data is a straightforward investment—see adjacent diagram. Typically, time tracking and purchased item/cost integration are normal integration considerations. See BNW whitepaper “Integrating Project Server and Business Systems”.



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## About the Author:

Ted Barth, Managing Partner of BNW Manufacturing Associates is the Past President of the PMI (Project Management Institute) Great Lakes Chapter and Founding Director of the Michigan Huron Valley PMI Chapter and is a Microsoft Partner. BNW has been providing high performance project and program management solutions for clients since 1996. During that period, Mr. Barth has utilized his manufacturing and engineering line management experience – managing seven plants in five states---to assist clients to increase their project and program performance.

Mr. Barth's use of the BNW Project Management Maturity Model is considered one of the most accelerated and ease of adoption approaches in U.S. Industry today. BNW is considered to be a subject matter expert a leader in the development of schedule, resource capacity management and cost management use for complex projects and programs. Mr. Barth currently is a guest speaker at PMI chapters and industry groups nationally on these topics.