Project Online and Project Server 2013 Workflows

Presented by Scott Clausen and Jacques Goupil

Tuesday January 20th, 2015

PPM Works

Project

Why clients choose PPM Works

Our Philosophy: We believe in honesty, integrity, and dedication – our passion for success drives our team. PPM Works core values start with family and health first to provide the most for our clients.

- Quality of Services are unmatched
- Trusted Experience
- Listening comes 1st
- Proven Methodology and Templates
- Competitive Pricing

*Thank you for the **information share** today! You are so **knowledgeable** and a gifted presenter/teacher.*

Program Manager, UnitedHealth Group

I wish we would have found PPM Works a long time ago - you make Microsoft Project understandable for all

Large Boston-based Pharma Co, Director of Training

*I've attended several industry webcasts, conference sessions, and vendor meeting – this week's MPUG webinar certificate series on Microsoft Project (Online, Server, and Professional) was **by far the best** and I found it very useful – thank you.*

Sr. Project Manager Consultant, Large Legal Firm

PPM Works

PPM Works Expertise

Project Server

Microsoft Project Server Implementations and Upgrades - let us assist you with your Project Server assessment. implementation, or upgrade. Our years of experience across all industries provide the foundation of our straight-forward team approach.

Project Online

Microsoft Project Online is a flexible online solution for project portfolio management (PPM) and everyday work. Delivered through Office 365, Project Online enables organizations to deliver the intended business value—from virtually anywhere on nearly any device.

Project Training

Our expert training has provided impactful learning to thousands for over fifteen years. We believe the best learning environment provides the opportunity to understand and practice the key concepts. Let our expert, patient trainers guide you to your Microsoft Project goals.

Support

PPM Works understands that you may have questions or need assistance on an ongoing basis or just a few times. Regardless of your situation, **PPM Works Support** options are flexible and meet your needs. Choose your Support plan today and get started.

PPM Works Other Services

Here at PPM Works, we provide clients with additional value everyday that extend beyond implementing Project Server, Upgrades, Training, and Support. Our experienced team is certified in Business Intelligence reporting, Collaboration, Project and Portfolio Management process development, Use Case scenarios, and more. Come explore all of our additional value-add services.

Mentoring	Business Intelligence	Process Development	Assessments	Collaboration	Staff Aug

PPM Works

Session Background

- Deeper Dive, Details Beyond Previous Resources
- Tips and from Lessons Learned in the Field
- Fast Pace, Consolidate Presentation

PPM Works

Great Resources on Workflows

- Hitchhiker's Guide to Demand Management in Project Server 2013 by Steven Haden
  http://go.microsoft.com/fwlink/p/?LinkId=304220

- Designing Project lifecycles and workflows in Project Online and Project Server 2013 by Steven Haden:
  http://channel9.msdn.com/Events/Project/2014/PC321

- Workflow deep dive in Project Online and Project Server 2013 by Biatrice Ambrosa (bia):
  http://channel9.msdn.com/Events/Project/2014/PC327

- Project Online & Project Server 2013 Workflows
  (MPUG Members Only):
  http://www.mpug.com/education/project-online-project-server-2013-workflows

PPM Works

Why Workflow?

Simple Reasons

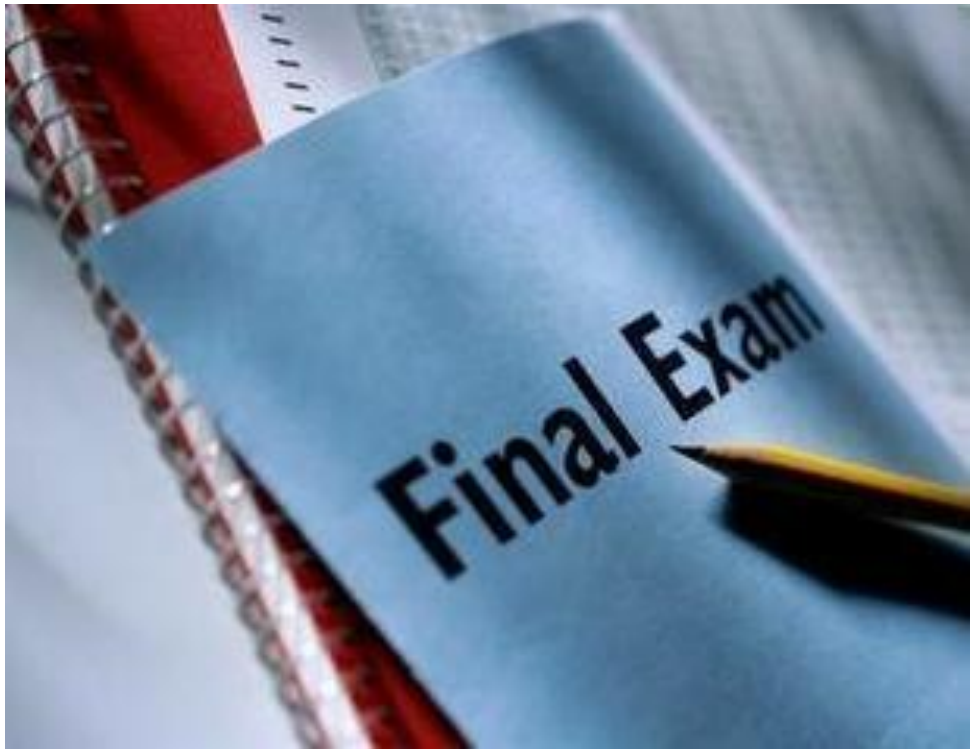
- Send Email Notice Upon Project Initiation
- Set Required Fields by Department

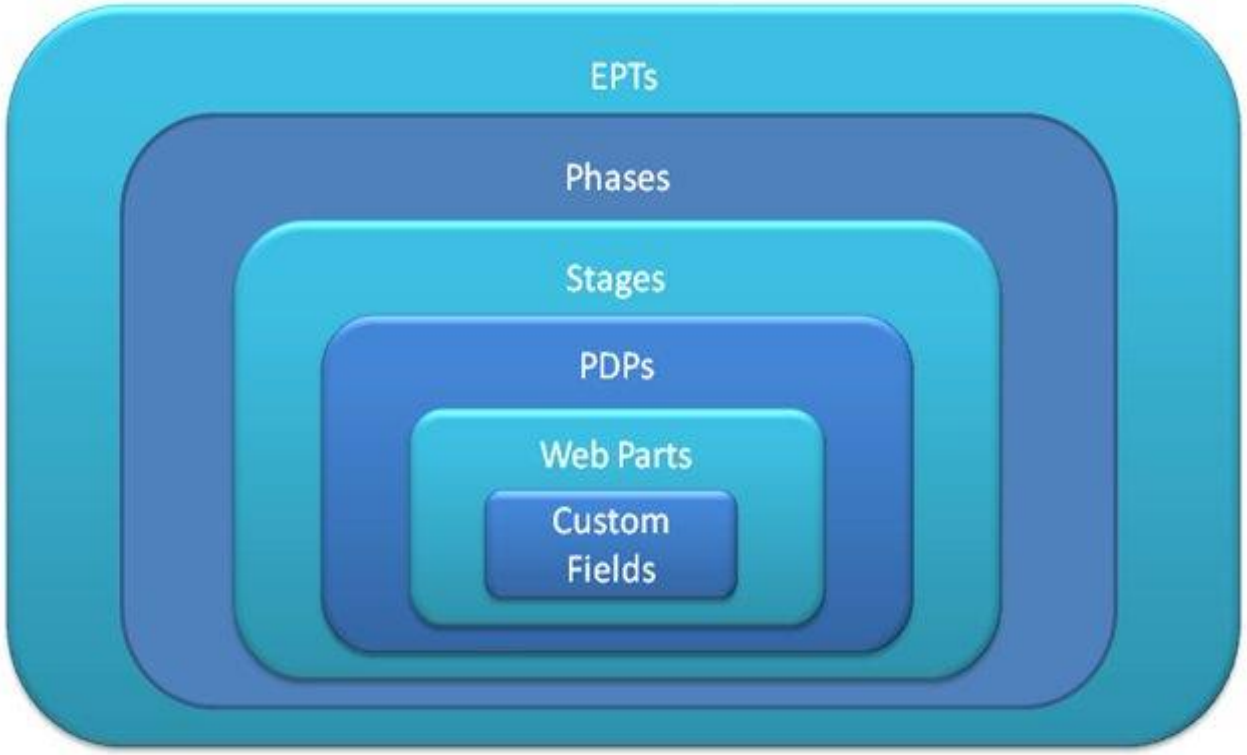
Advanced Reasons

- Implement Demand Management
- Transition Informal to Formal Portfolio Governance
- Raise Organizational Commitment to Portfolio Management

PPM Works

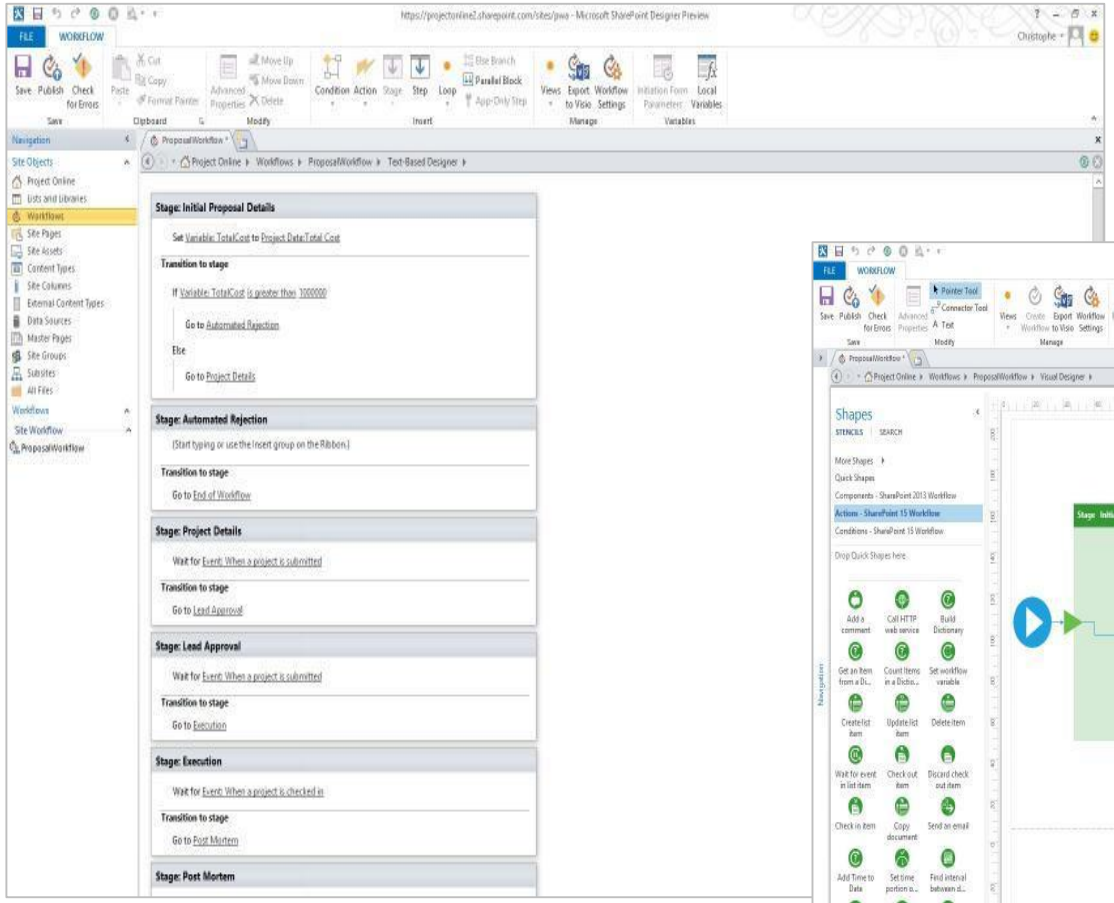
Workflow Implementation is the Final Exam for Project Online / Project Server

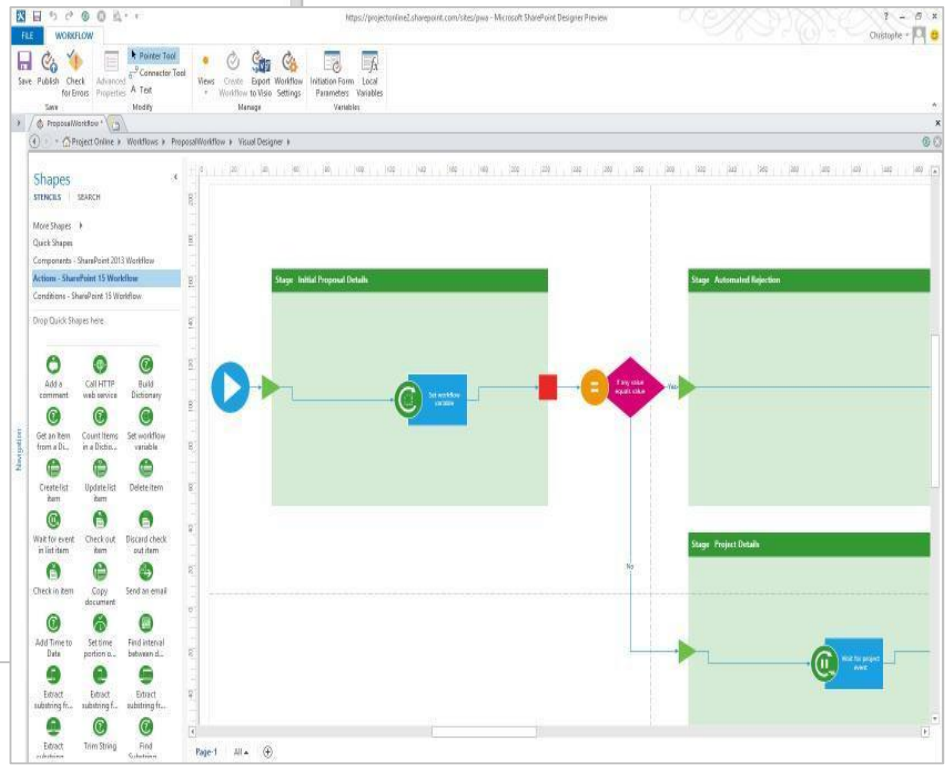




PPM Works

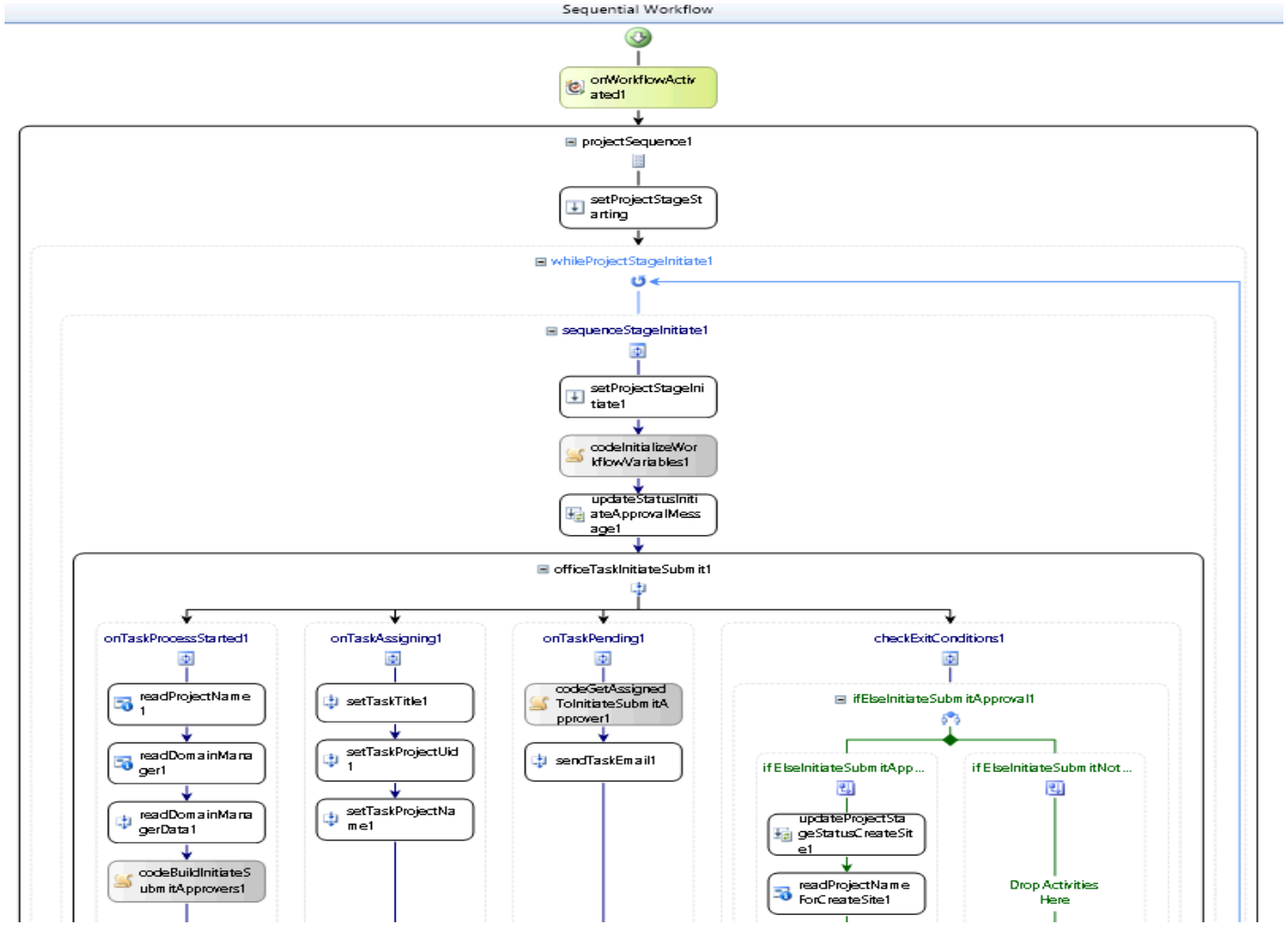
SharePoint Designer Workflows for Project Online / Project Server 2013





PPM Works

Challenge:
How to Upgrade Workflows Developed for Project Server 2010 in Visual Studio



PPM Works

Sequential Workflows for Project Server 2010
Work on Project Server 2013 !!!

Site Settings ▸ Workflow Settings

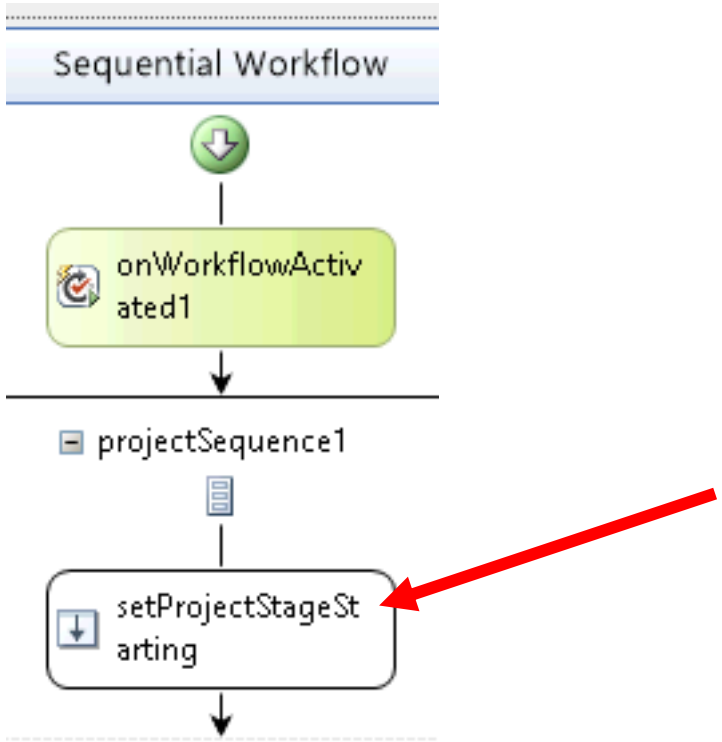
Workflows

Workflow Name (click to change settings)	Workflows in Progress
SharePoint 2013 Workflows	
There are no SharePoint 2013 Workflows associated with this site.	
SharePoint 2010 Workflows	
GSS Project	1209
MS Non PDP Project	97
MS PDP Project	9
Sample Proposal Workflow	1
SS PDP Info Project	214
SS PDP Project	96
VT CDP Project	22
VT PDP Project	18
VT Simple Project	36
VT TechDev Project	2

PPM Works

FYI

2010 Sequential Workflows must start with a Set Project Stage Activity



PPM Works

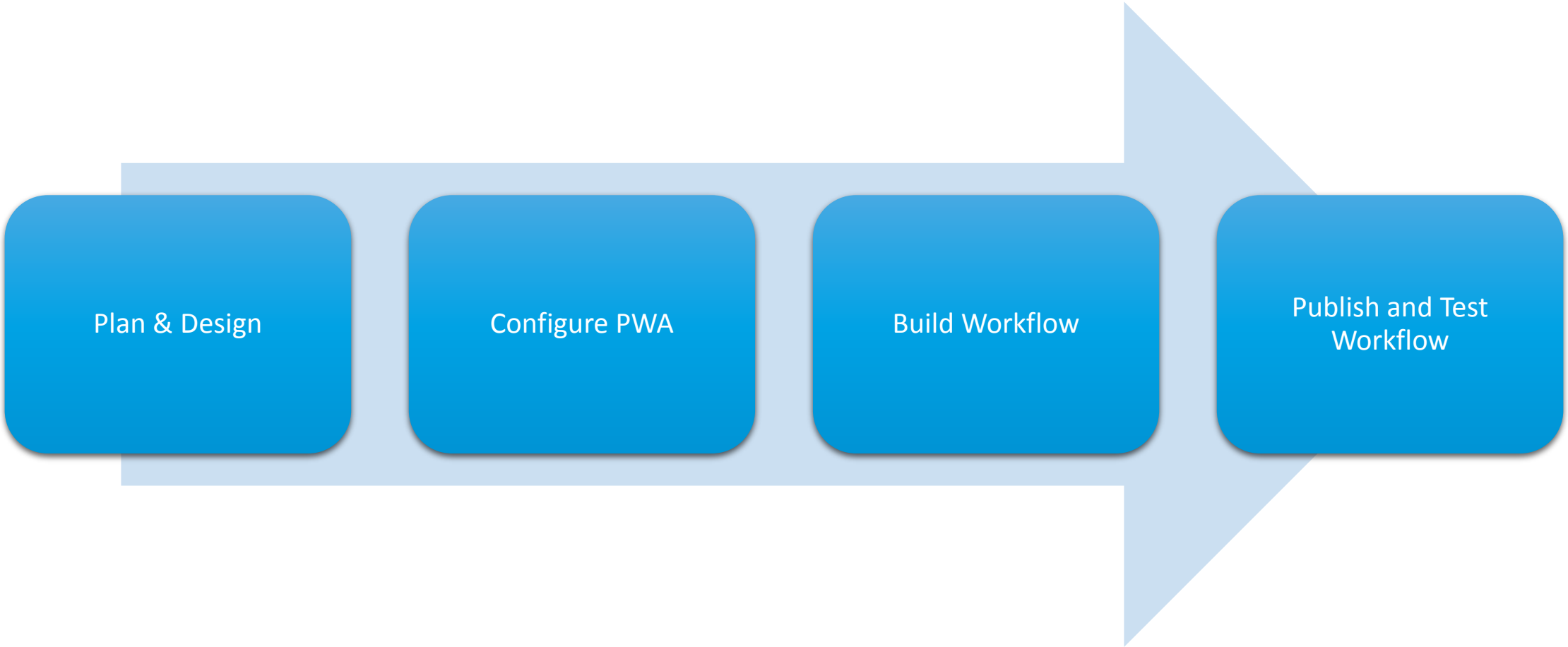
Challenge:

Preventing disruption to users when implementing workflows

PPM Works

Tip #1
Follow a Workflow Implementation Process, outside of Production

Quick Tip



PPM Works

Tip #2
Document the Workflow Design Before Building

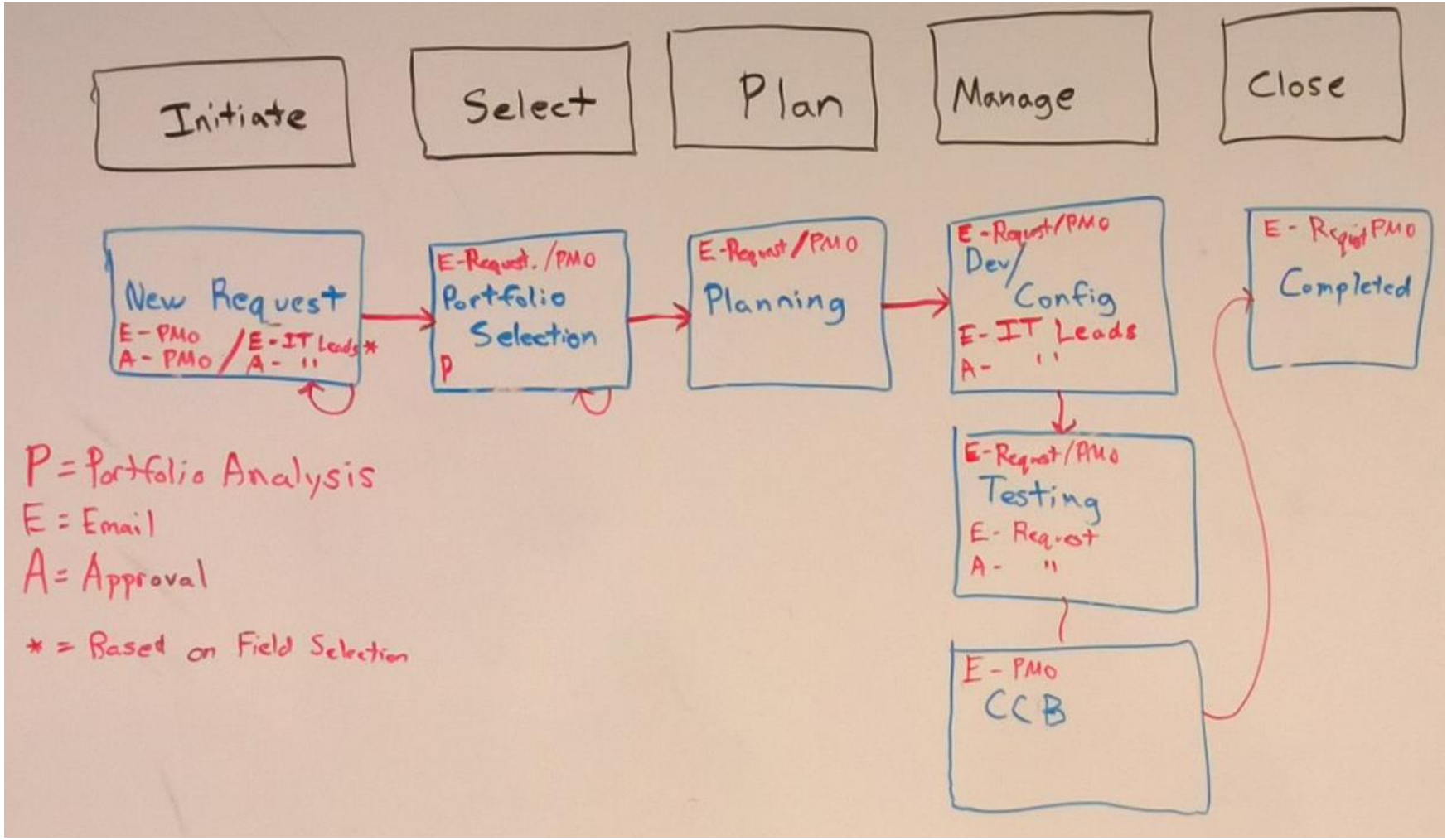
Quick Tip

Visio

Excel

PPM Works

Start with White-Boarding



PPM Works

Next Translate Whiteboard Notes to a Design Document

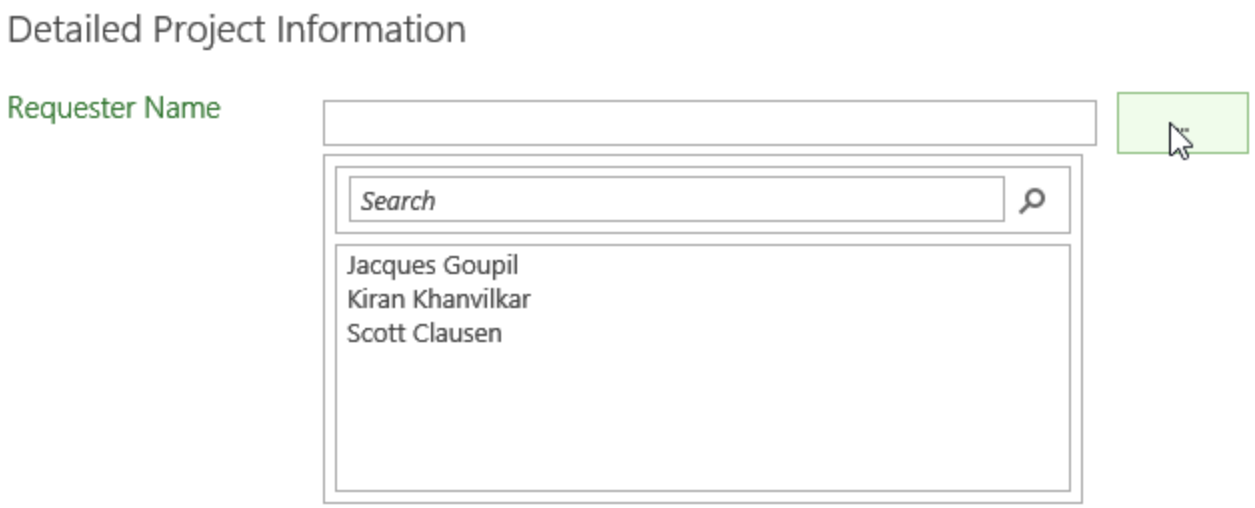
Demo: Instructor to perform demo

Participants to watch and understand

Ask Questions

PPM Works

Challenge:
Sending an Email Notice based on Project Information



PPM Works

Using a SharePoint List for Email

Demo: Instructor to perform demo

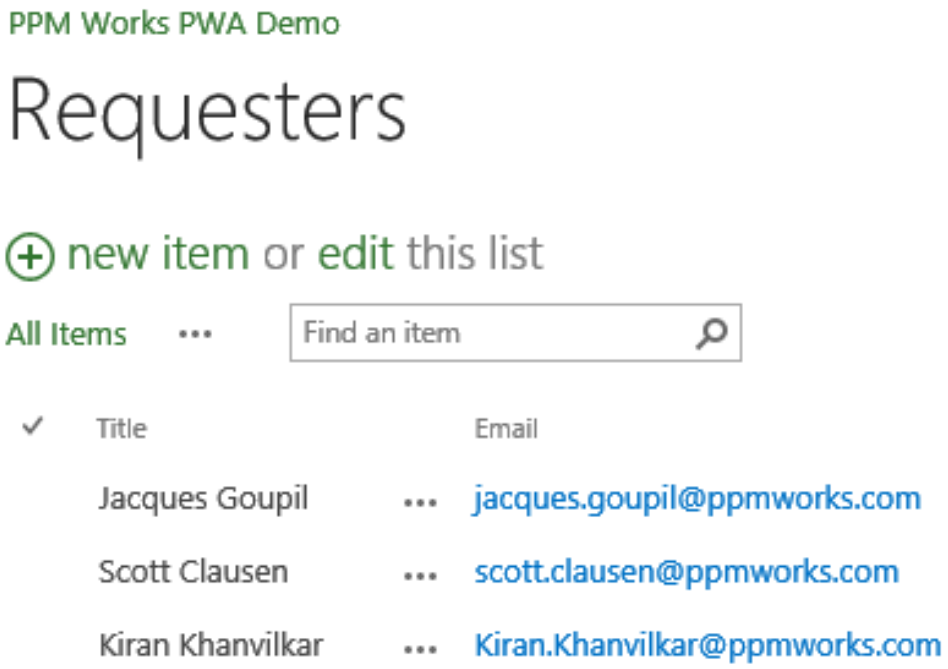
Participants to watch and understand

Ask Questions

PPM Works

Tip #3
Use a SharePoint List to Identify Email Addresses

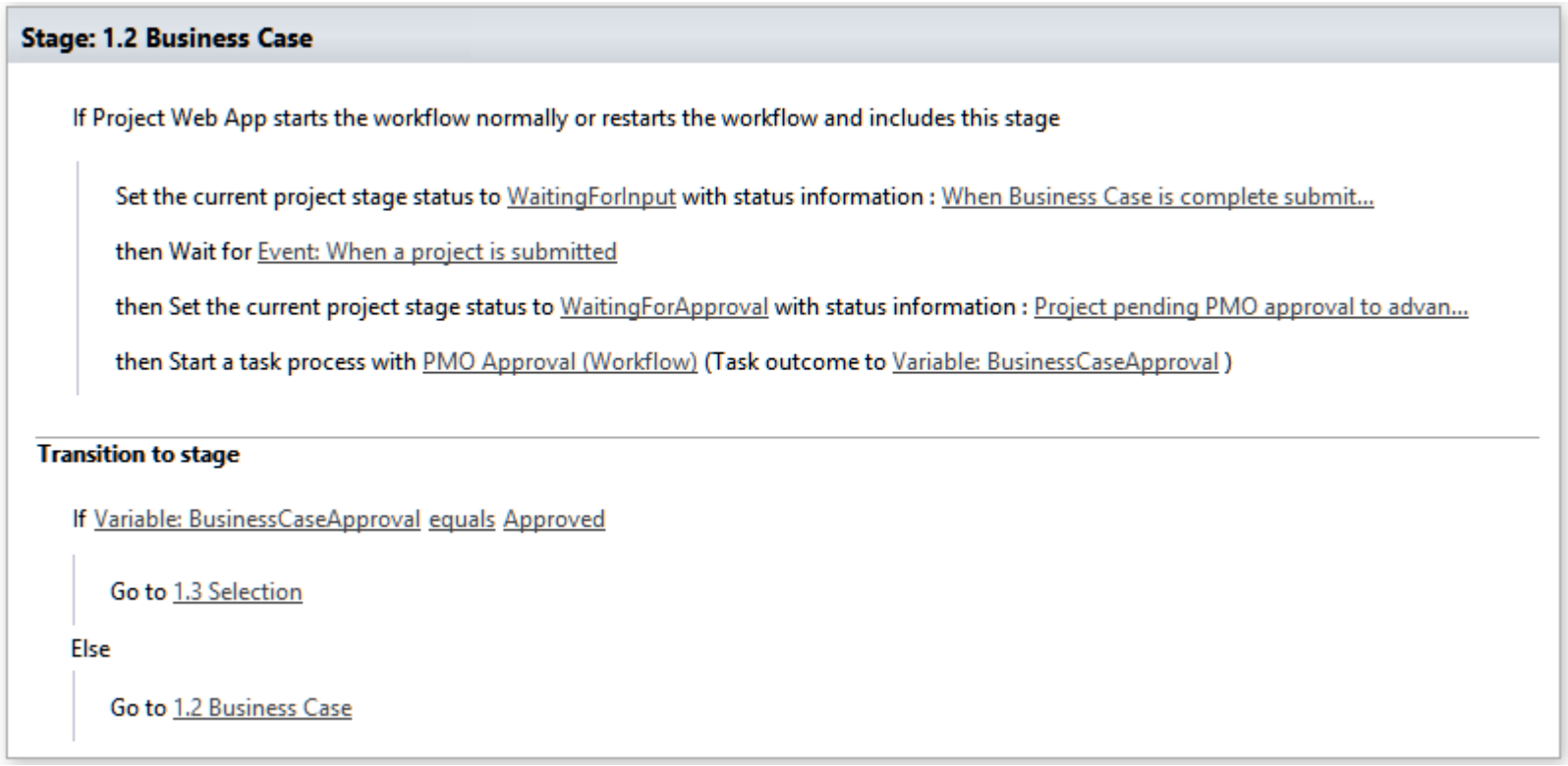
Quick Tip



PPM Works

Challenge:

Determining where in the workflow to send email after a project is approved or rejected.



PPM Works

Using Repeating Condition Sets for Email Notifications

Demo: Instructor to perform demo

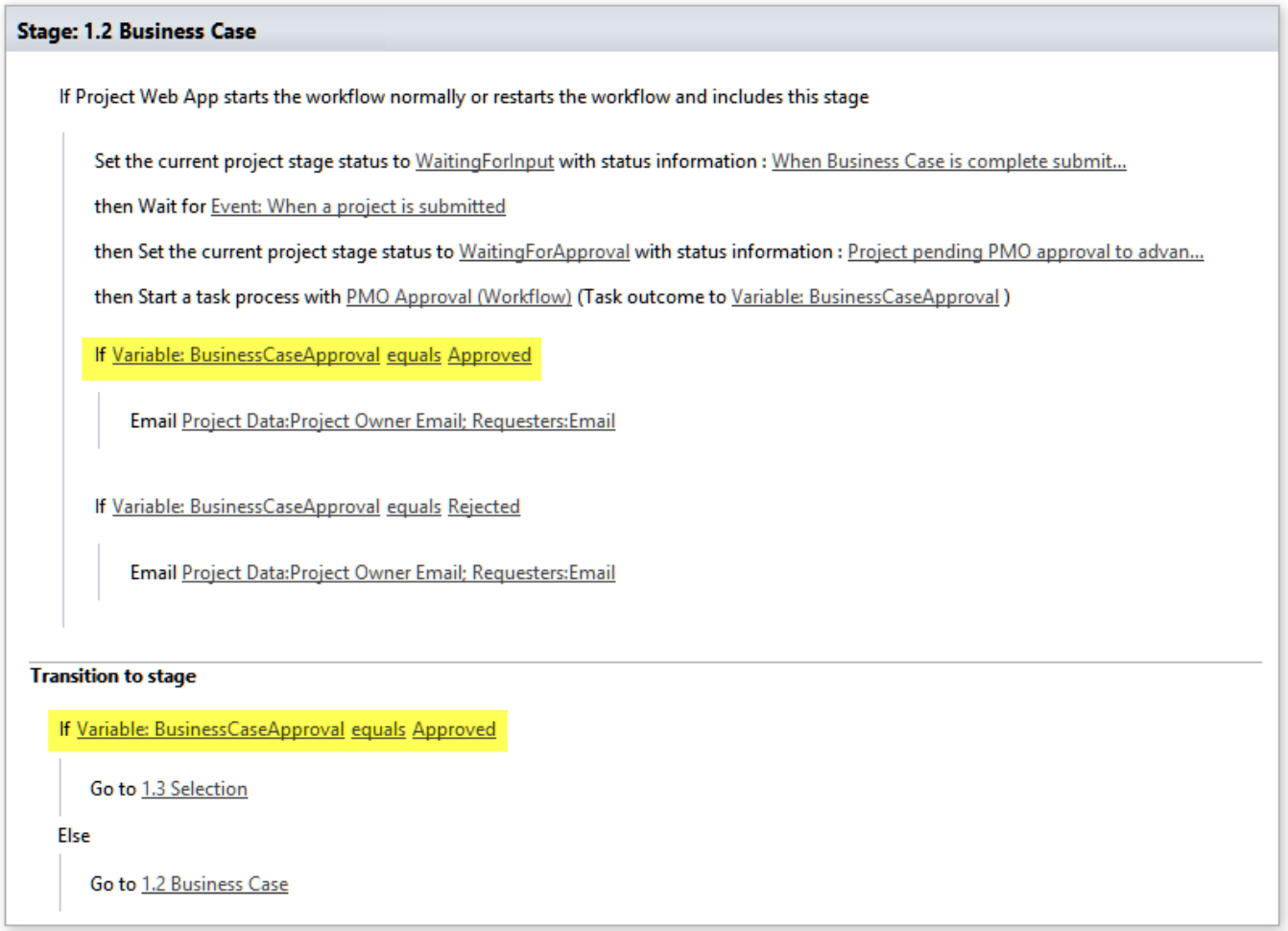
Participants to watch and understand

Ask Questions

PPM Works

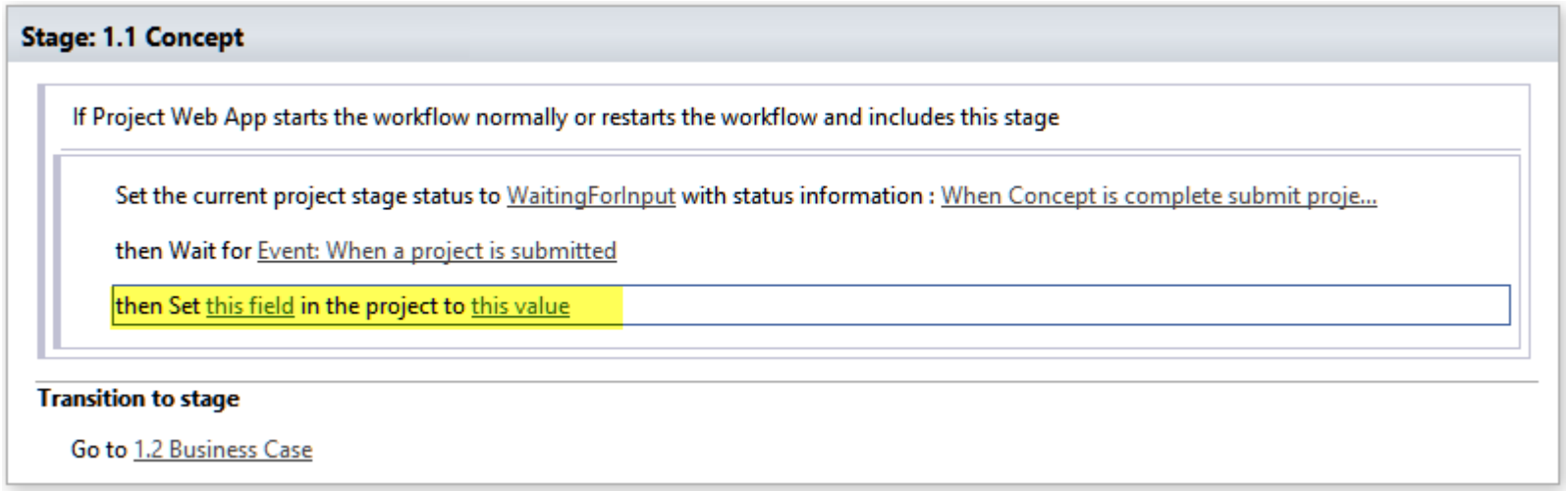
Tip #4
Repeat Condition Sets for Email Notifications

Quick Tip



PPM Works

Challenge:
Using the Set Project Field Action



PPM Works

Set Force Check-In on Stage

Demo: Instructor to perform demo

Participants to watch and understand

Ask Questions

PPM Works

Tip #5
When Setting Fields Don't Forget to force Check-In on the Stage

Quick Tip

Project Check In Required

Choose whether this Workflow Stage requires the project to be checked in. If project checkin is required for the current workflow stage, the user cannot Submit the Project to Workflow without checking in the Project. This option is typically selected if any project updates occur in this Workflow Stage (which will be blocked if the project is not checked in).

PPM Works

Challenge:
Updating Stage Status for new and completed stages

All Workflow Stages

Workflow Stage status may not show current information until the project is either Submitted or the page is Refreshed.

	Stage	State	Entry Date	Completion Date	Status Info
	Workflow Phase: 1 Initiation				
✓	1.1 Concept	Completed	10/19/2014 10:21 PM	1/19/2015 8:40 AM	When Concept is complete submit project to advance to Business Case
→	1.2 Business Case	In Progress (Waiting for Input)	1/19/2015 8:40 AM		When Business Case is complete submit project to advance to Initial Plan

PPM Works

Setting Stage Status When Entering and Exiting Each Stage

Demo: Instructor to perform demo

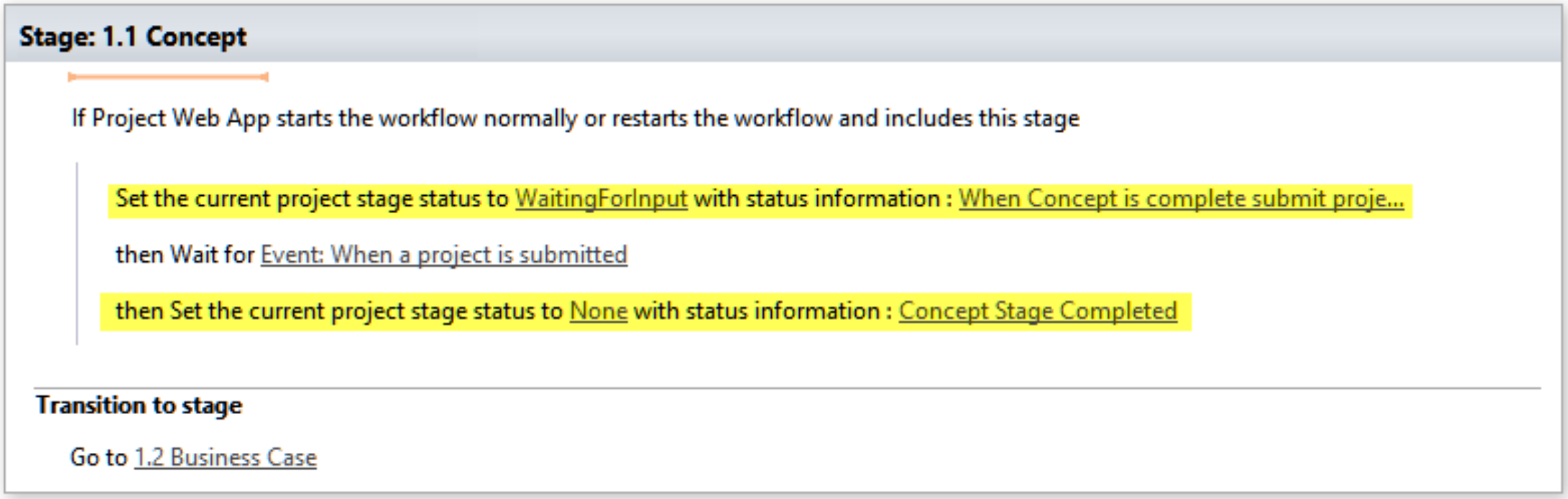
Participants to watch and understand

Ask Questions

PPM Works

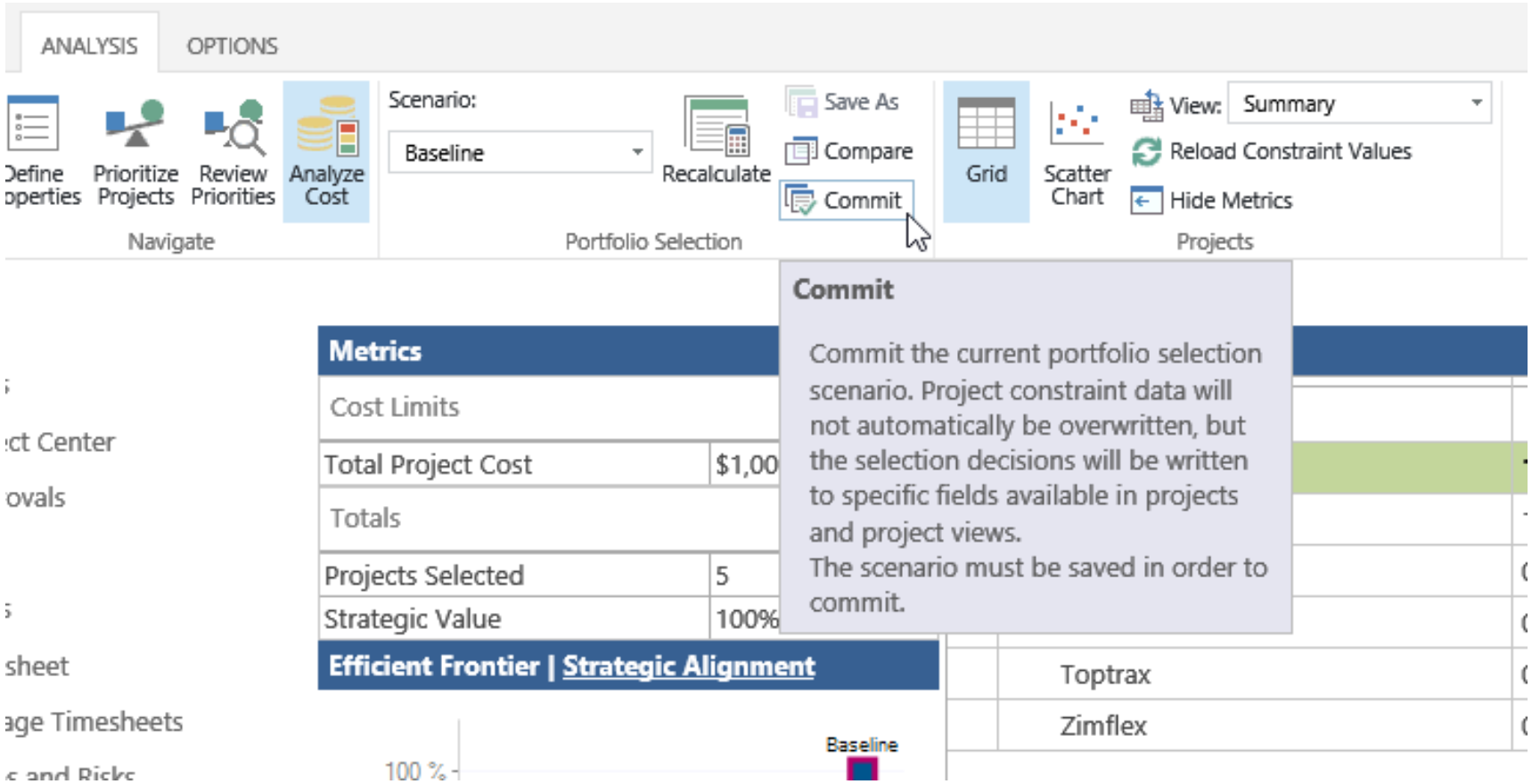
Tip #6
Set Stage Status When Entering and Exiting Each Stage

Quick Tip



PPM Works

Challenge:
Including Portfolio Selection as a Workflow Condition



PPM Works

Including Portfolio Selection as a Workflow Condition

Demo: Instructor to perform demo

Participants to watch and understand

Ask Questions

PPM Works

Tip #7
Evaluate Optimizer / Planner Decision for 0 or 3

Quick Tip

Member name	Description
ForcedIn	Value = 0. Item is forced into the optimizer function regardless of other filters.
ForcedOut	Value = 1. Item is forced out of the optimizer function regardless of other filters.
Out	Value = 2. Item is not included in the optimizer function.
In	Value = 3. Item is included in the optimizer function.

If Project Data:Optimizer Decision equals 0

    Set Variable: PortfolioSelection to 1

Else

    If Project Data:Optimizer Decision equals 3

        Set Variable: PortfolioSelection to 1

http://msdn.microsoft.com/en-us/library/office/microsoft.office.project.server.library.optimizer.committeddecisionresult_dipj14mref(v=office.15).aspx

PPM Works

Challenge:
Including On Hold and Canceled Stages

PPM Works

Adding On Hold and Canceled Stages

Demo: Instructor to perform demo

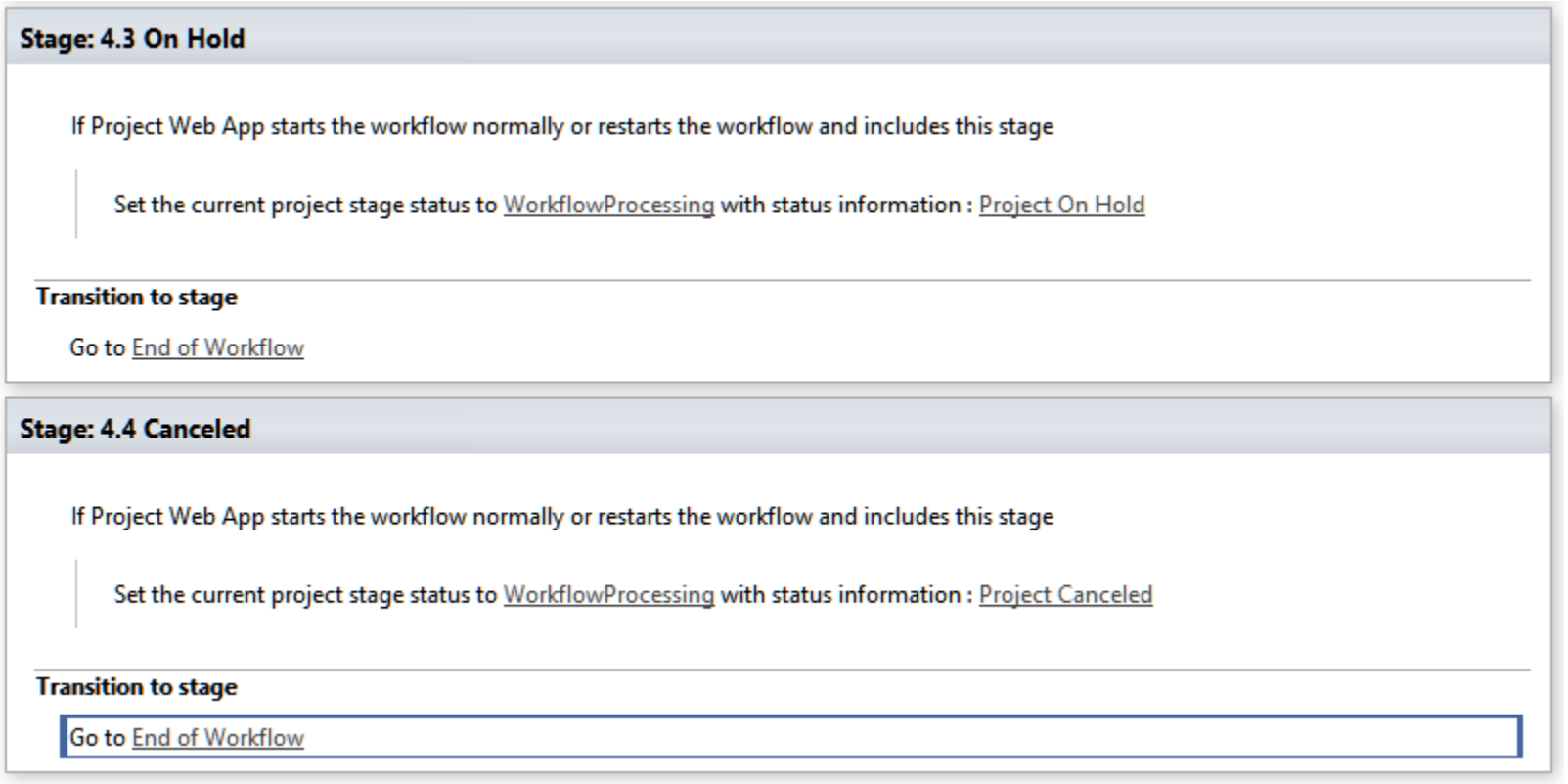
Participants to watch and understand

Ask Questions

PPM Works

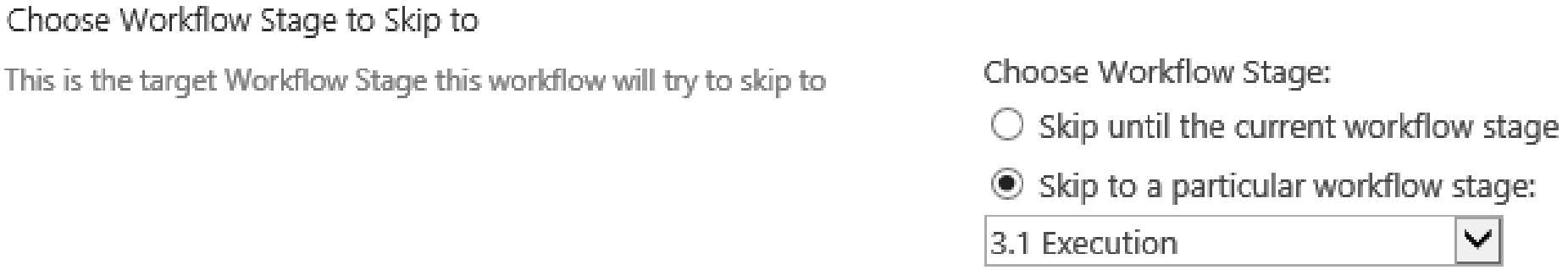
Tip #8
Place On Hold and Canceled Stages at End of Workflow, Transition to End of Workflow

Quick Tip



PPM Works

Challenge:
When Workflow is restarted it's not sipping to a particular Workflow Stage



PPM Works

Include the Include this Stage Condition

Demo: Instructor to perform demo

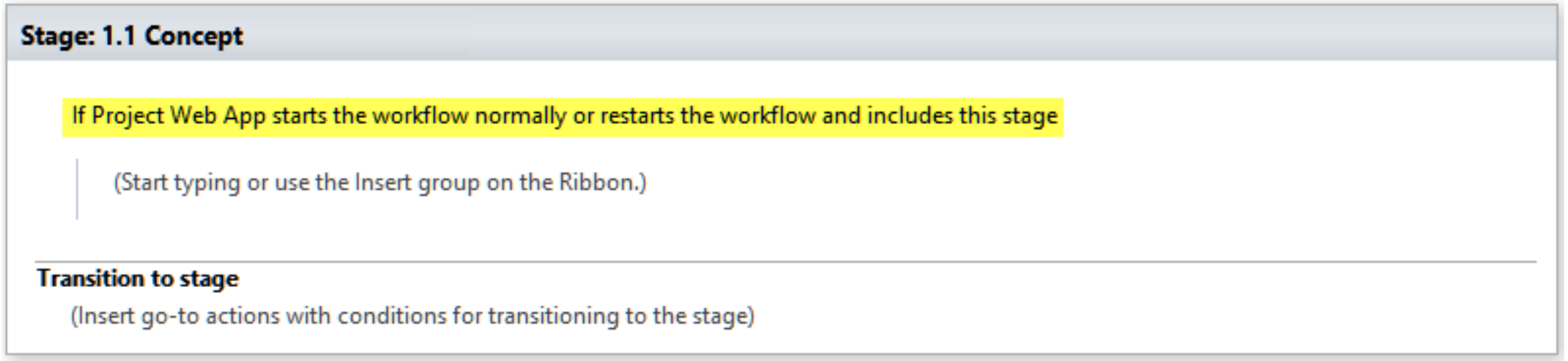
Participants to watch and understand

Ask Questions

PPM Works

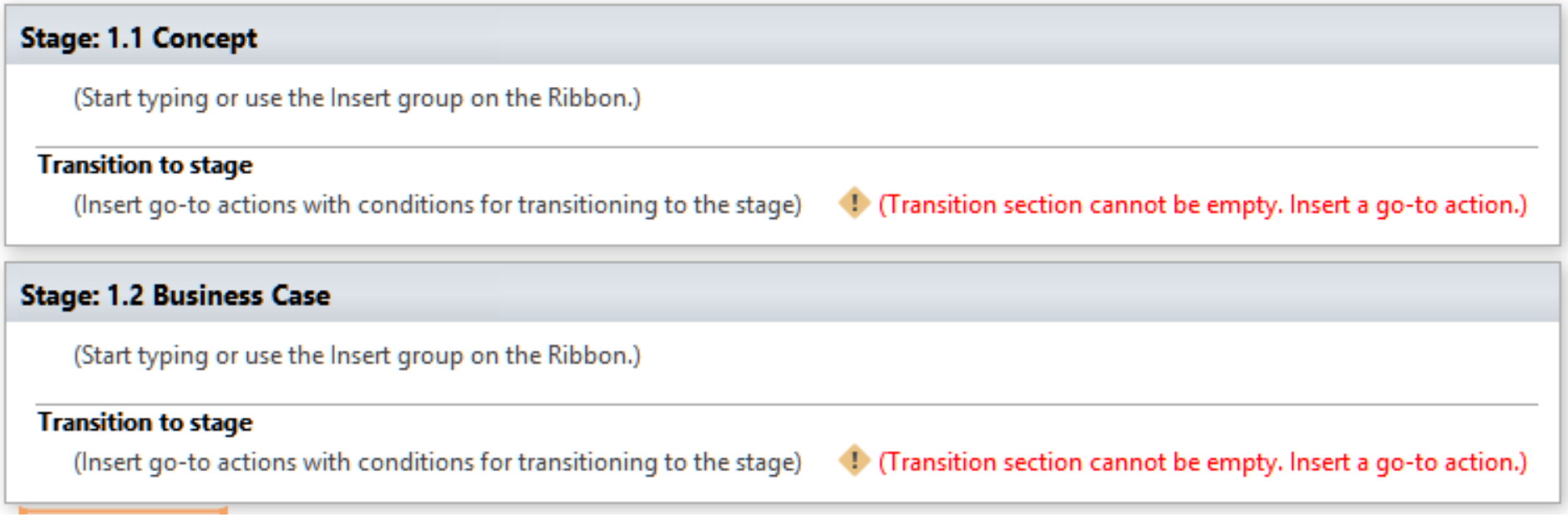
Tip #9
Add the "Include this Stage" Condition to All Stages for Skip to Stage

Quick Tip



PPM Works

Challenge:
Prevent breaking an existing workflow



PPM Works

Export to Visio

Demo: Instructor to perform demo

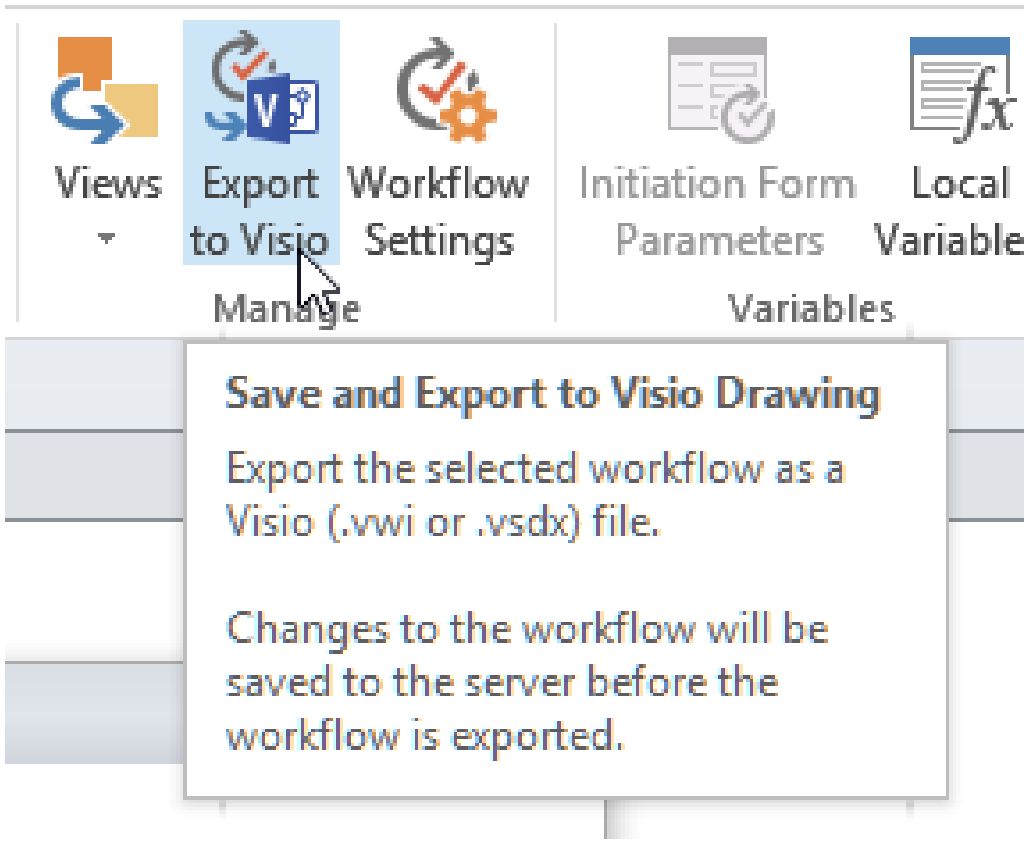
Participants to watch and understand

Ask Questions

PPM Works

Tip #10
Export to Visio Frequently for Backup!

Quick Tip



PPM Works

Review of Tips

Quick Tip

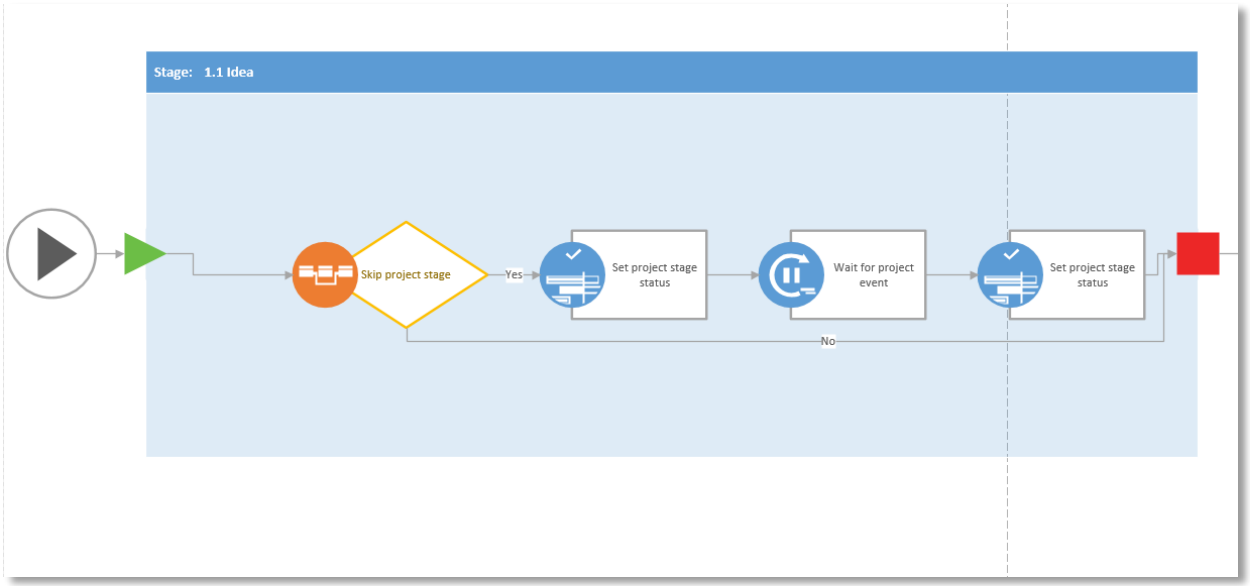
1. Follow a Workflow Implementation Process, outside of Production
2. Document the Workflow Design Before Building
3. Use a SharePoint List to Identify Email Addresses
4. Repeat Condition Sets for Email Notifications
5. When Setting Fields Don’t Forget to force Check-In on the Stage
6. Set Stage Status When Entering and Exiting Each Stage
7. Evaluate Optimizer / Planner Decision for 0 or 3
8. Place On Hold and Canceled Stages at End of Workflow
9. Add the “Include this Stage” Condition to All Stages for Skip to Stage
10. Export to Visio Frequently for Backup!

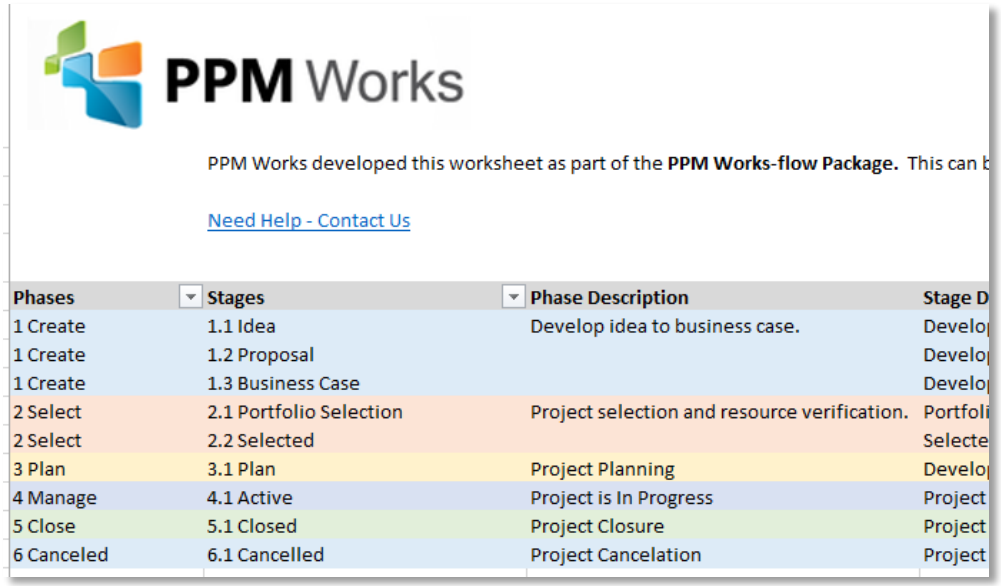
PPM Works

Microsoft Project Workflow Toolkit

Email for a copy of the Microsoft Project Server Workflow Toolkit

info@ppmworks.com





PPM Works

PPM Works developed this worksheet as part of the **PPM Works-flow Package.** This can b

Need Help - Contact Us

Phases	Stages	Phase Description	Stage D
1 Create	1.1 Idea	Develop idea to business case.	Develo
1 Create	1.2 Proposal		Develo
1 Create	1.3 Business Case		Develo
2 Select	2.1 Portfolio Selection	Project selection and resource verification.	Portfoli
2 Select	2.2 Selected		Selecte
3 Plan	3.1 Plan	Project Planning	Develo
4 Manage	4.1 Active	Project is In Progress	Project
5 Close	5.1 Closed	Project Closure	Project
6 Canceled	6.1 Cancelled	Project Cancelation	Project

PPM Works

Call to Action

LinkedIn: www.linkedin.com/company/ppm-works-inc-
Our Site: www.ppmworks.com
Blog: http://ppmworks.com/blog/

PPM Works

Calls to Action

1. Start incorporating these techniques today
2. Email for the Microsoft Project Workflow Toolkit info@ppmworks.com
3. Check out our Blogs / webcasts
4. Get LinkedIn with us
5. Let us know if you have any questions

Contact Details

Jacques Goupil
Director, Business Development
Toll Free: (888) 858-3060

PPM Works