

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 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

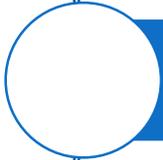
Staff Aug



Session Background



Deeper Dive, Details Beyond Previous Resources



Tips and from Lessons Learned in the Field



Fast Pace, Consolidate Presentation



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>



Why Workflow?

Simple Reasons

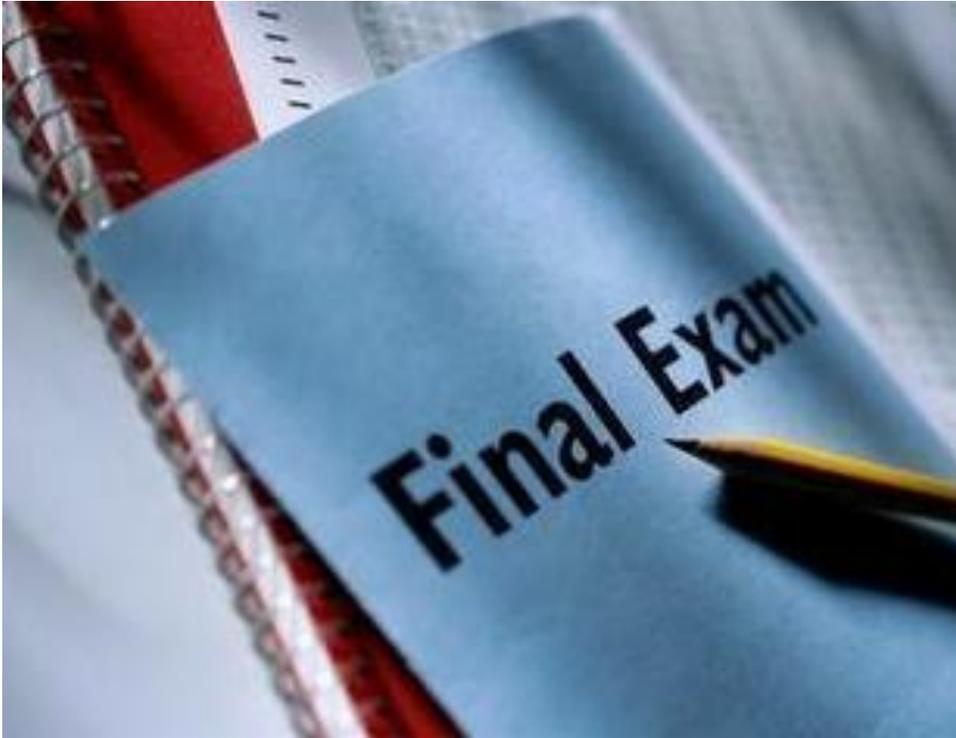
- Send Email Notice Upon Project Initiation
- Set Required Fields by Department

Advanced Reasons

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



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





SharePoint Designer Workflows for Project Online / Project Server 2013

The image displays two screenshots of Microsoft SharePoint Designer 2013. The left screenshot shows the 'Text-Based Designer' view for a workflow named 'ProposalWorkflow'. It lists several stages:

- Stage: Initial Proposal Details**
 - Action: Set Variable: Total Cost to Project Date.Total Cost
 - Transition to stage: If Variable: Total Cost is greater than 1000000
 - Yes: Go to Automated Rejection
 - No: Go to Project Details
- Stage: Automated Rejection**
 - Transition to stage: Go to End of Workflow
- Stage: Project Details**
 - Action: Wait for Event: When a project is submitted
 - Transition to stage: Go to Lead Approval
- Stage: Lead Approval**
 - Action: Wait for Event: When a project is submitted
 - Transition to stage: Go to Execution
- Stage: Execution**
 - Action: Wait for Event: When a project is checked in
 - Transition to stage: Go to Post Mortem
- Stage: Post Mortem**

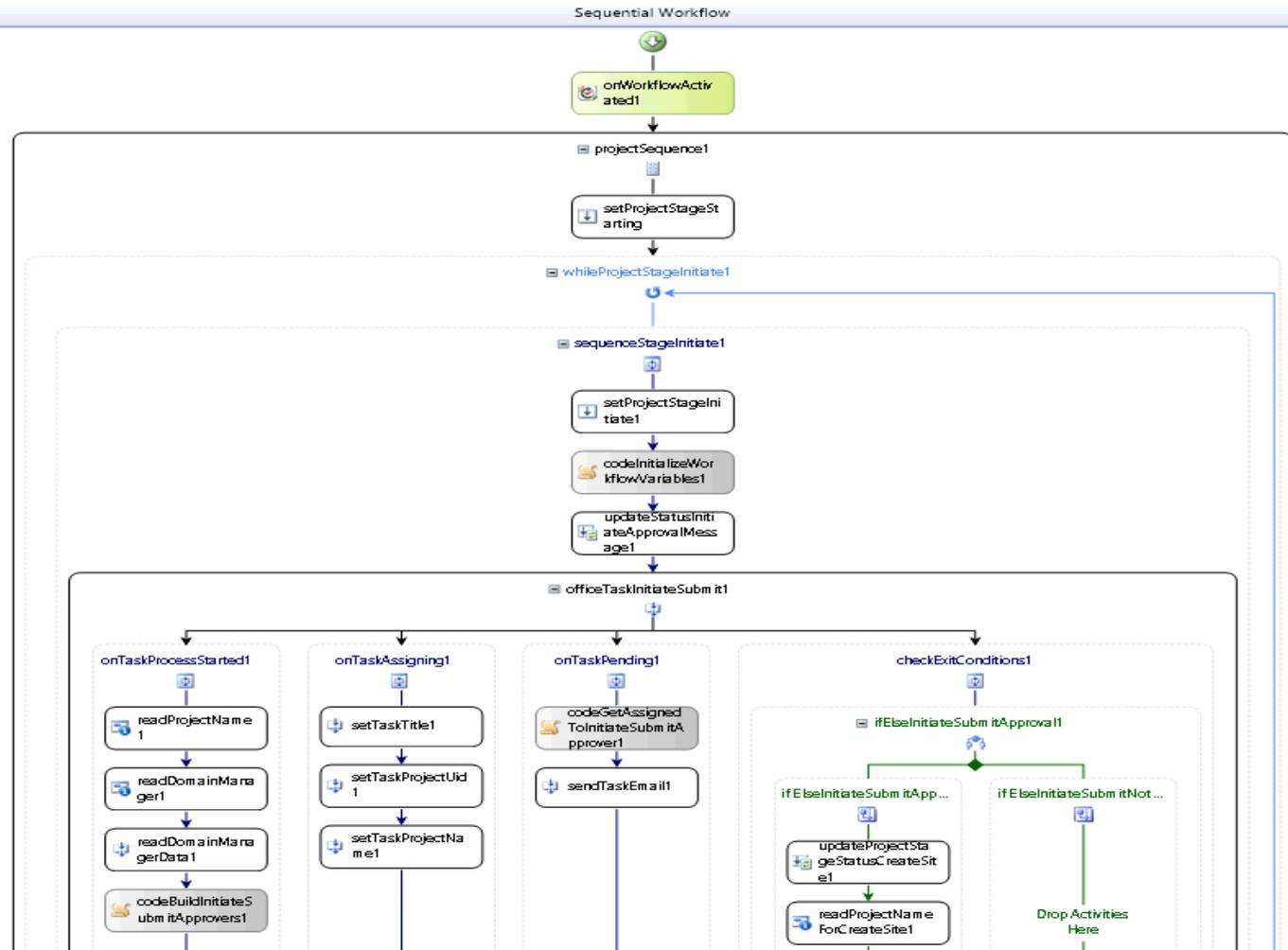
The right screenshot shows the 'Visual Designer' view of the same workflow. It features a flowchart with the following elements:

- Start arrow pointing to a green box labeled 'Stage: Initial Proposal Details'.
- A blue circle icon labeled 'Set workflow variable'.
- A red diamond decision icon labeled 'If value equal or less'.
- A green box labeled 'Stage: Automated Rejection' connected to the 'Yes' path of the decision.
- A green box labeled 'Stage: Project Details' connected to the 'No' path of the decision.
- A blue circle icon labeled 'Wait for event' at the end of the 'Stage: Project Details' path.



Challenge:

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





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.

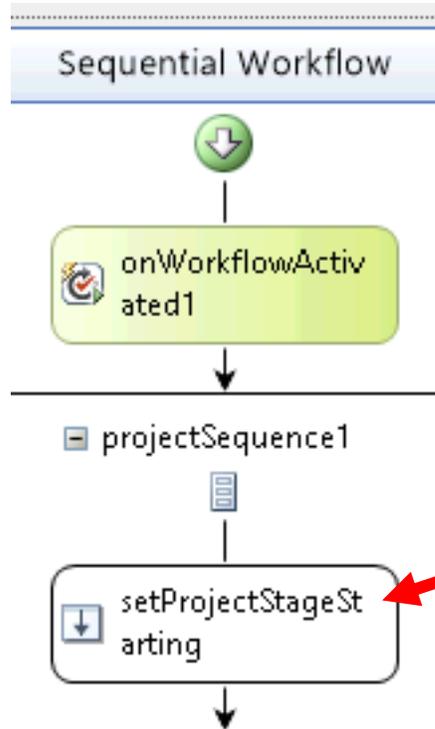
SharePoint 2010 Workflows

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



FYI

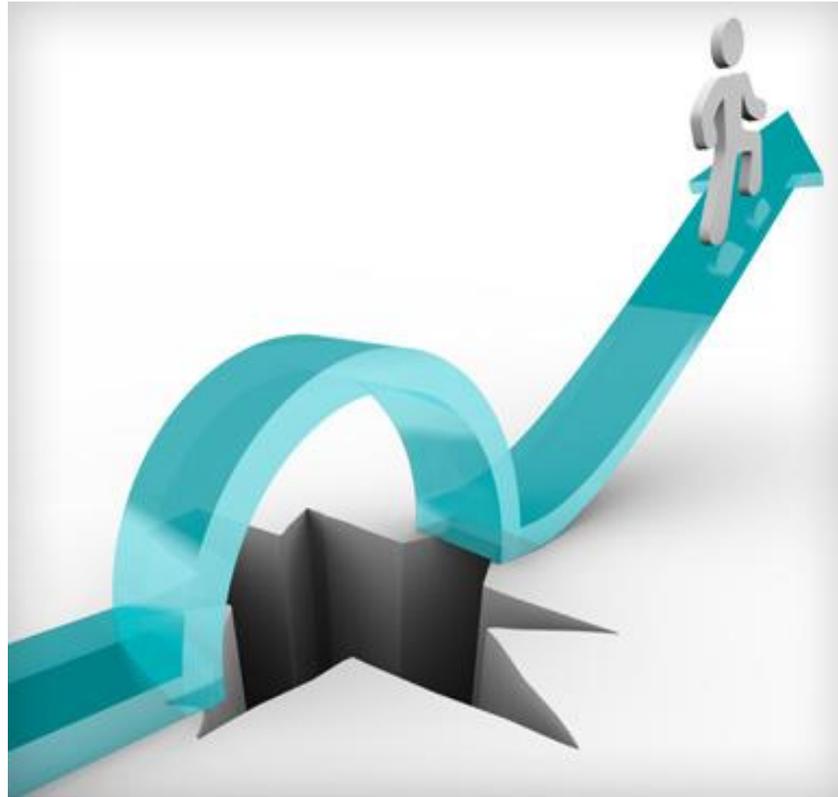
2010 Sequential Workflows must start with a Set Project Stage Activity





Challenge:

Preventing disruption to users when implementing workflows

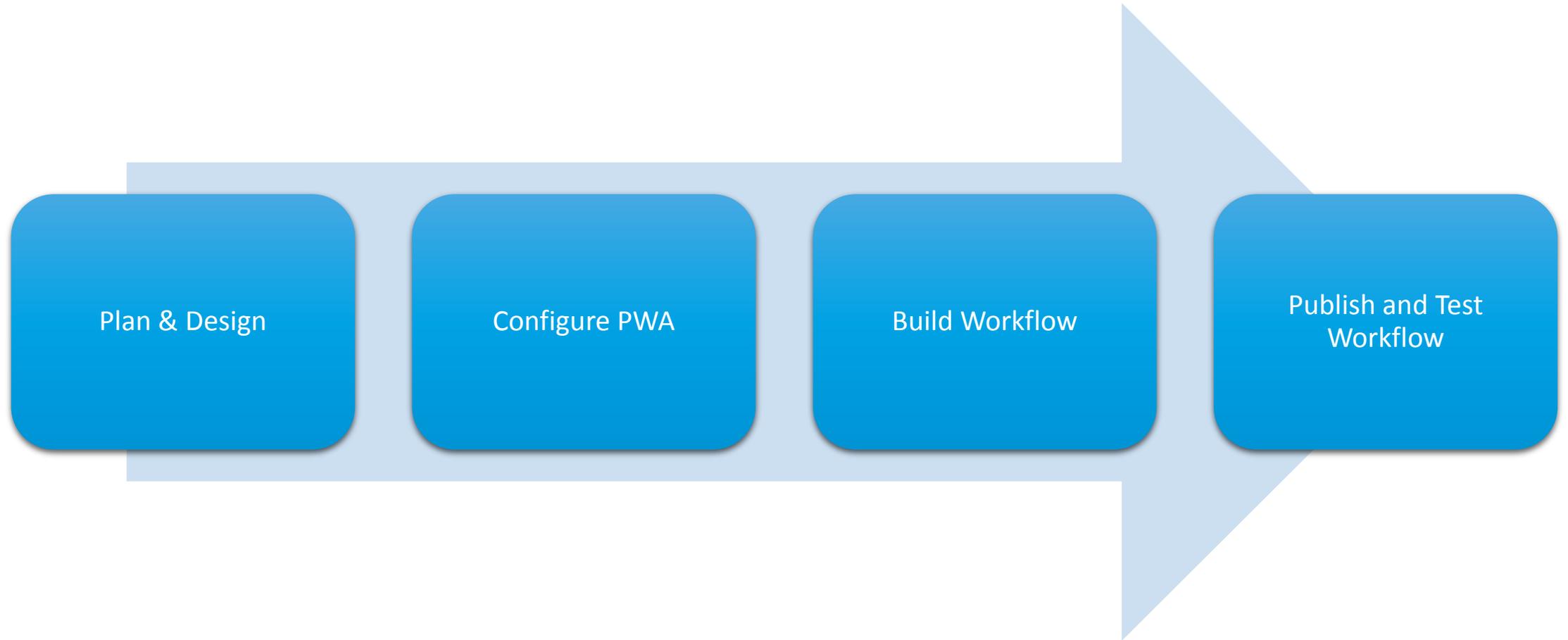




Tip #1

Follow a Workflow Implementation Process, outside of Production

Quick Tip





Quick Tip

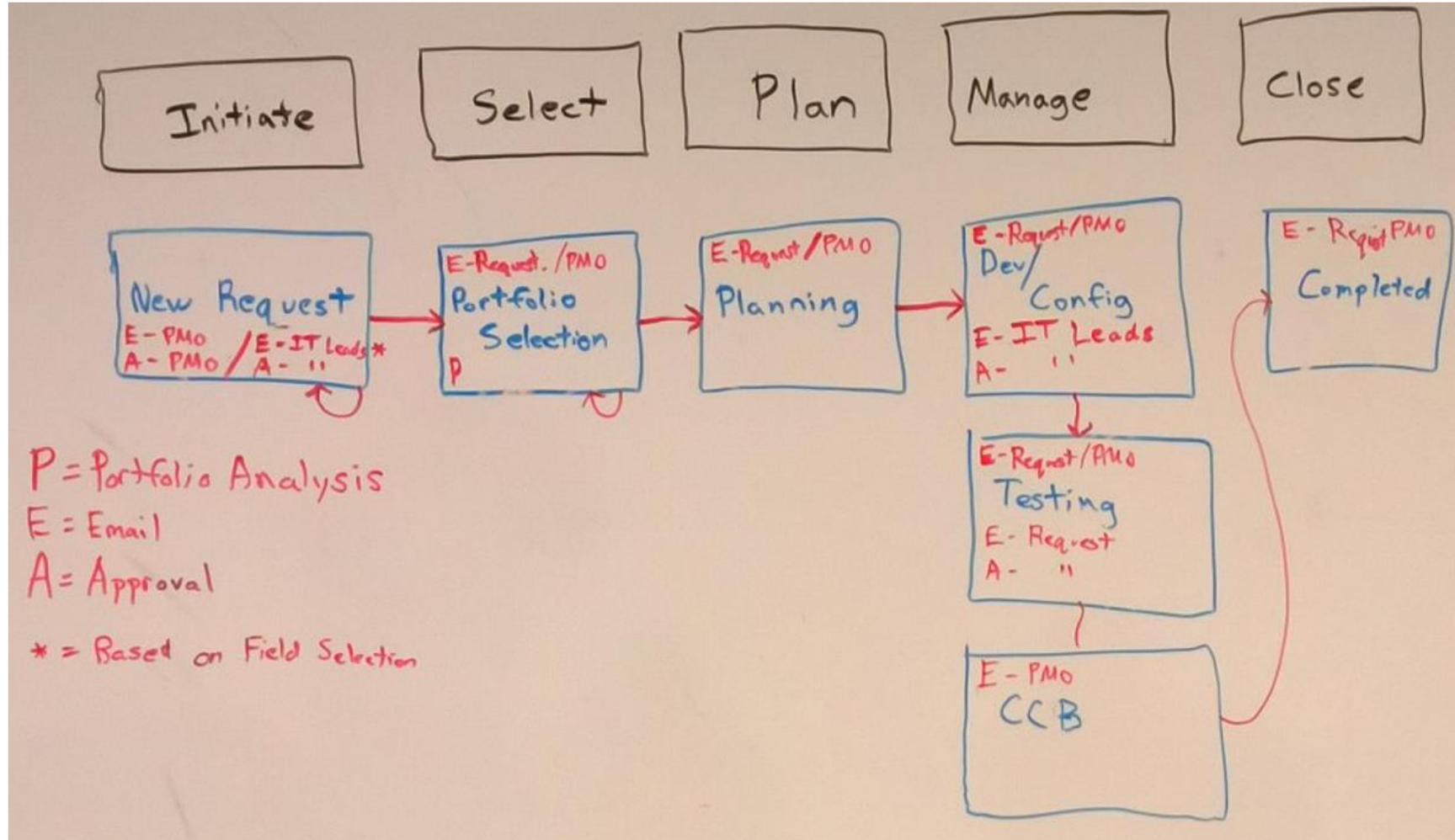
Tip #2

Document the Workflow Design Before Building





Start with White-Boarding





Next Translate Whiteboard Notes to a Design Document

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Challenge: Sending an Email Notice based on Project Information

Detailed Project Information

Requester Name





Jacques Goupil
Kiran Khanvilkar
Scott Clausen



Using a SharePoint List for Email

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #3

Quick Tip

Use a SharePoint List to Identify Email Addresses

PPM Works PWA Demo

Requesters

[+ new item](#) or [edit this list](#)

All Items



Find an item



✓	Title		Email
	Jacques Goupil	...	jacques.goupil@ppmworks.com
	Scott Clausen	...	scott.clausen@ppmworks.com
	Kiran Khanvilkar	...	Kiran.Khanvilkar@ppmworks.com



Challenge:

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

Stage: 1.2 Business Case

If Project Web App starts the workflow normally or restarts the workflow and includes this stage

- Set the current project stage status to WaitingForInput with status information : When Business Case is complete submit...
- then Wait for Event: When a project is submitted
- then Set the current project stage status to WaitingForApproval with status information : Project pending PMO approval to advan...
- then Start a task process with PMO Approval (Workflow) (Task outcome to Variable: BusinessCaseApproval)

Transition to stage

If Variable: BusinessCaseApproval equals Approved

- Go to 1.3 Selection

Else

- Go to 1.2 Business Case



Using Repeating Condition Sets for Email Notifications

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #4

Repeat Condition Sets for Email Notifications

Quick Tip

Stage: 1.2 Business Case

If Project Web App starts the workflow normally or restarts the workflow and includes this stage

Set the current project stage status to WaitingForInput with status information : When Business Case is complete submit...

then Wait for Event: When a project is submitted

then Set the current project stage status to WaitingForApproval with status information : Project pending PMO approval to advan...

then Start a task process with PMO Approval (Workflow) (Task outcome to Variable: BusinessCaseApproval)

If Variable: BusinessCaseApproval equals Approved

Email Project Data:Project Owner Email; Requesters:Email

If Variable: BusinessCaseApproval equals Rejected

Email Project Data:Project Owner Email; Requesters:Email

Transition to stage

If Variable: BusinessCaseApproval equals Approved

Go to 1.3 Selection

Else

Go to 1.2 Business Case



Challenge:

Using the Set Project Field Action

Stage: 1.1 Concept

If Project Web App starts the workflow normally or restarts the workflow and includes this stage

Set the current project stage status to WaitingForInput with status information : When Concept is complete submit proje...

then Wait for Event: When a project is submitted

then Set this field in the project to this value

Transition to stage

Go to 1.2 Business Case



Set Force Check-In on Stage

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #5

Quick Tip

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

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).

Project check in is required



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



Setting Stage Status When Entering and Exiting Each Stage

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #6

Set Stage Status When Entering and Exiting Each Stage

Stage: 1.1 Concept

If Project Web App starts the workflow normally or restarts the workflow and includes this stage

Set the current project stage status to WaitingForInput with status information : When Concept is complete submit proje...

then Wait for Event: When a project is submitted

then Set the current project stage status to None with status information : Concept Stage Completed

Transition to stage

Go to 1.2 Business Case



Challenge: Including Portfolio Selection as a Workflow Condition

Commit

Commit the current portfolio selection scenario. Project constraint data will not automatically be overwritten, but the selection decisions will be written to specific fields available in projects and project views. The scenario must be saved in order to commit.

Metrics	
Cost Limits	
Total Project Cost	\$1,000
Totals	
Projects Selected	5
Strategic Value	100%

Efficient Frontier | Strategic Alignment

Toptrax
Zimflex



Including Portfolio Selection as a Workflow Condition

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #7

Evaluate Optimizer / Planner Decision for 0 or 3

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

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

Else

If Project Data:Optimizer Decision equals 3

Set Variable: PortfolioSelection to 1



Challenge: Including On Hold and Canceled Stages





Adding On Hold and Canceled Stages

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #8

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

Quick Tip

Stage: 4.3 On Hold
If Project Web App starts the workflow normally or restarts the workflow and includes this stage
Set the current project stage status to <u>WorkflowProcessing</u> with status information : <u>Project On Hold</u>
Transition to stage
Go to <u>End of Workflow</u>
Stage: 4.4 Canceled
If Project Web App starts the workflow normally or restarts the workflow and includes this stage
Set the current project stage status to <u>WorkflowProcessing</u> with status information : <u>Project Canceled</u>
Transition to stage
Go to <u>End of Workflow</u>



Challenge:

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

Choose Workflow Stage to Skip to

This is the target Workflow Stage this workflow will try to skip to

Choose Workflow Stage:

- Skip until the current workflow stage
- Skip to a particular workflow stage:

3.1 Execution



Include the Include this Stage Condition

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #9

Add the “Include this Stage” Condition to All Stages for Skip to Stage

Quick Tip

Stage: 1.1 Concept

If Project Web App starts the workflow normally or restarts the workflow and includes this stage

(Start typing or use the Insert group on the Ribbon.)

Transition to stage

(Insert go-to actions with conditions for transitioning to the stage)



Challenge: Prevent breaking an existing workflow

Stage: 1.1 Concept
(Start typing or use the Insert group on the Ribbon.)
Transition to stage
(Insert go-to actions with conditions for transitioning to the stage)  (Transition section cannot be empty. Insert a go-to action.)
Stage: 1.2 Business Case
(Start typing or use the Insert group on the Ribbon.)
Transition to stage
(Insert go-to actions with conditions for transitioning to the stage)  (Transition section cannot be empty. Insert a go-to action.)



Export to Visio

Demo

Demo: Instructor to perform demo
Participants to watch and understand
Ask Questions



Tip #10

Export to Visio Frequently for Backup!

Quick Tip

The screenshot shows a toolbar with several icons. The 'Export to Visio' icon, which features a blue square with a white 'V' and a circular arrow, is highlighted with a blue background. A mouse cursor is pointing at this icon. A tooltip box is open below the icon, containing the following text:

Save and Export to Visio Drawing
Export the selected workflow as a Visio (.vwi or .vsdx) file.

Changes to the workflow will be saved to the server before the workflow is exported.

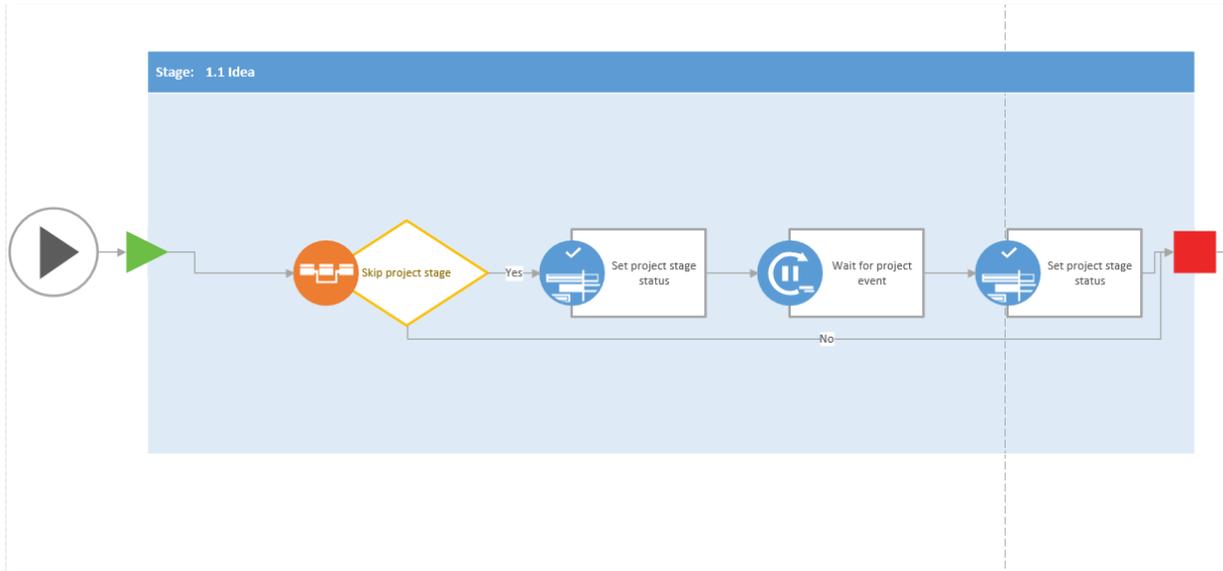


Review of Tips

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!

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 be found in the **PPM Works-flow Package**.

[Need Help - Contact Us](#)

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

Call to Action



LinkedIn: www.linkedin.com/company/ppm-works-inc

Our Site: www.ppmworks.com

Blog: <http://ppmworks.com/blog/>

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

