University Identifies IT Project Priorities, Delivers Results to CIO and VP of Finance

Overview

Country or Region: United States
Industry: Education—Universities

Customer Profile
Marquette University is a coeducational Jesuit university in Milwaukee, Wisconsin. It has 11,500 students and 2,200 faculty, staff, and administrators.

Business Situation
Marquette wanted to expand its project management practices so it could better prioritize potential projects, effectively manage resources, and improve business intelligence.

Solution
Marquette implemented Microsoft Project Server 2010 and Microsoft Project Professional 2010.

Benefits
- One source for all projects
- Ability to prioritize
- Tools for resource management
- Dashboards for business intelligence
- Ability to service increased demand

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Dan Smith, Senior Director of IT Services, Marquette University

Marquette University—a large Jesuit university in Milwaukee, Wisconsin—wanted to expand its project management practices. Although Marquette successfully managed projects inside and outside the IT department, it wanted to better track and prioritize potential projects and improve its resource management. Marquette implemented Microsoft Project Professional 2010 and Microsoft Project Server 2010, which the university uses to maintain an integrated database of potential and existing projects and to prioritize projects based on business rules. With the solution, the university has improved its resource management, and it uses dashboards to communicate business intelligence to internal customers and senior management. Demand for project management services across the university is increasing due to the effectiveness of its project management processes and tools.

Microsoft
Project Server 2010

Situation

Marquette University is a nationally ranked private, coeducational university established in 1881 in Milwaukee, Wisconsin. With 11,500 students, including 8,000 undergraduates, it is one of the largest Jesuit universities in the United States.

Marquette has a centralized IT Services department that includes six project managers, four of whom are certified Project Management Professionals. "We run all IT-related projects—not just internal ones, but those that affect the university as a whole," says Dan Smith, Senior Director of IT Services at Marquette. "For example, we managed the implementation of a new student system and an upgrade for the financial and human resources application. We also act as a subsidiary project management office to the Office of the University Architect for building projects."

Marquette was managing these projects using Microsoft Office Project Server 2007. "We enjoyed the collaborative aspects of the software, including workspaces that could serve as the focal point for all projects, capturing documents, issues, and risks," says Smith. "But we had some projects that were not covered because they were not yet 'projects': they were pending, or in planning and awaiting a budget, or submitted for budget approval."

Smith tracked these potential projects in a separate database using Microsoft Office Access 2007 database software. His office had no way to prioritize these projects. "Furthermore, when the CIO asked, 'Do you have project X on your list?' I would have to open that Office Access 2007 database to find out," Smith says.

Smith was also concerned about resource management. "We have long wanted to do better resource management—for example, to see when a database analyst was busy so we could avoid overloading him or her. But we discovered that this requires a fairly mature project methodology—a project schedule with tasks outlined in sufficient detail that the task durations are meaningful."

To communicate with the wider university community, project managers generated a weekly status report that was sent out by e-mail. Smith also created lists of projects, potential projects, and potential issues and risks, and then handed the lists to a Web developer, who generated Web pages to inform the appropriate university audiences. The process worked smoothly but did involve some manual labor, and the business intelligence in the reports was static—neither automatically updated nor easy for users to probe.

Marquette wanted a means to include and prioritize both active and potential projects, provide tools for more effective resource management, and expand and automate project business intelligence across the university.

Solution

The university decided to participate in the Technology Adoption Program for Microsoft Project Professional 2010 and Microsoft Project Server 2010. Marquette deployed Project Server 2010 in a virtual environment on an HP ProLiant BL460c G1 blade server computer and used the features of Project Server 2010 to expand project and portfolio management practices.

Project Server 2010 enhances reporting and project execution. It also incorporates and improves the functions of Office Project Portfolio Server 2007. "'Integration' is not even the right word anymore, because it's

one product," says Smith. "You don't have to move or manipulate anything—it all works together seamlessly."

Furthermore, Smith uses Project Server 2010 to incorporate the database of potential projects and to prioritize them. "We can define business rules on how projects should be ranked," Smith says. Currently the rules are IT-focused: how a project aligns with the existing technology stack, the current system state (whether it's replacing something at the end of its life), the stakeholders and beneficiaries, and the effect on the university. He adds, "In the future, we want to get other departments more involved in setting these rules."

The six project managers perform their duties using Project Professional 2010. "The full-blown client provides a rich feature set for managing projects," Smith says. For example, managers frequently use visual scheduling features to identify overallocations. As a manager sets up tasks, resources, and the amount of time a resource can be dedicated to a project, Project Professional 2010 identifies in red the time periods where the resource has too much to do. "You see a little red person on the screen, and on the Resource page the tasks also show up in red. It's a strong visual way to see your potential problems," Smith says. The manager can then use Project Professional 2010 to apply resource leveling, which uses task priorities to determine which tasks should be performed in which order.

With another popular feature enhanced in Project 2010, the Timeline View, managers can easily create a high-level view of a project plan. They can drag and drop tasks into the timeline and paste the timeline into presentations or e-mail messages. "We use Timeline View all the time," says Smith. "It alone is worth the price of admission."

Approximately 370 team members (people working on projects, inside or outside the IT Services department) and upper-management staff access information in Project Server 2010 through the Microsoft Project Web App technology. "They can view their tasks, look at their projects, or go to project workspaces to update their issues—all through a Web browser," Smith says.

Marquette has instituted synchronization of Project Server 2010 task data with Microsoft Exchange Server 2010 Enterprise. With this synchronization, users can see and update tasks in the Microsoft Outlook 2010 messaging and collaboration client instead of having to open Project Web App.

Marquette has deployed Microsoft SharePoint Server 2010 to take advantage of the software's workflows. And because Project Server 2010 is built on SharePoint Server 2010, interoperation is seamless. For example, a SharePoint Server 2010 workflow automatically routes change orders to the appropriate approval authorities. Indeed, because Marquette stores project workspace documents in SharePoint Server 2010, it gains cross-platform compatibility—for example, with Macintosh users at the law school.

Finally, Marquette is working on building executive-level dashboards, using Project Server 2010 to show high-level metrics such as the number of projects in progress, in planning, and behind schedule.

Benefits
Marquette uses Microsoft Project Server 2010 to be a source for all project-related information, to prioritize projects, and to more effectively manage resources. IT Services has plans to improve business intelligence and is doing its job so

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effectively that demands for its services are increasing.

One Source for All Projects

The Marquette IT services department no longer has to maintain its separate Office Access 2007 database of potential projects. When Smith's supervisors want to find out if he's aware of an upcoming project, they can see the Project Server 2010 data themselves using Project Web App. "One of the biggest wins we got out of the Microsoft Project 2010 upgrade was the ability to have all of our projects in one spot," Smith says.

Furthermore, it's easy to filter and sort those projects. "You can put your own fields into the Project Server 2010 database," says Smith. "That's what I did with our 'gates,' such as Pending or Awaiting Budget Approval. With the click of a button I can go from a view of all my projects and their various gates to a view that shows only active projects assigned to a certain project manager. The software is customizable to display what you want, when you want it."

Ability to Prioritize

The Marquette IT Services department uses Project Server 2010 to rank its potential projects. "For the first time, this year we were able to send the Office of Finance a list of projects prioritized using a methodology in Project Server 2010, rather than using our best guess of what the priority should be," Smith says. "We can show Finance a ranked list of the projects we want to see funded."

The financial office appreciates the ranking. "Our Vice President for Finance wants to do things in a more organized manner," Smith says. "Right now we use Project Server 2010 to develop an internal IT ranking, but he sees this as the first step toward an

ultimate goal of having all key players contribute to ranking the projects."

Tools for Resource Management

Project Server 2010 and Project Professional 2010 provide valuable tools that Marquette can combine with its mature project processes to achieve effective resource management. "The Resource pane in Project Professional 2010 shows a manager with the appropriate permissions all of the resources and the projects they're on," says Smith. "So in Project Professional 2010, you can see where a person is overallocated, go to the project manager, and say, 'Can you free this person up for me?' That's huge for us."

Meanwhile, Project Server 2010 supports the increasingly mature project management processes at Marquette. "You can't have a four-line project and expect to do resource management," says Smith. "But we're just now at the maturity level where we can start taking advantage of the features in Project Server 2010. And when you do it right—with tasks, resource assignments, and durations that are detailed and meaningful—you can actually look at a schedule and say, 'Victor is overworked this week but not next week. Maybe I can move this task to next week and see what that does to the rest of the schedule.'"

Dashboards for Business Intelligence

The executive-level dashboards will increase effective business intelligence. "With the new business intelligence features of Project Server 2010, you can get more information out more easily than you could before," Smith says. "The dashboards will automate some of the reporting steps that we take right now, freeing up a few hours per month. But more importantly, the information will be timely and available." From dashboards, users will be able to drill

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For more information about Marquette University, call (414) 288-7250 or visit the Web site at:
www.mu.edu

down to find out more about what they're interested in.

Ability to Service Increased Demand
Smith measures his department's performance partly by the satisfaction of IT and non-IT project sponsors and their demand for project management services. "People keep coming to ask us to run projects for them. They say, 'You did a good job last time and we want you to do so again.' That's very gratifying for us." He says that the number of projects his office is managing has increased by 5–7 over the last year—and they've increased in size and importance as well.

Smith continues, "Our success comes from a combination of our expertise, the processes we use to run projects, and the tools—such as Project 2010—that help us take full advantage of the expertise and processes."

Microsoft Project Server 2010

Microsoft Project Server 2010 brings together the business collaboration platform services of Microsoft SharePoint Server 2010 with structured execution capabilities to provide flexible work management solutions. Project Server 2010 unifies project and portfolio management to help organizations align resources and investments with business priorities, gain control across all types of work, and visualize performance through powerful dashboards.

For more information about Microsoft Project Server 2010, go to:
www.microsoft.com/project/2010

Software and Services
- Microsoft Server Product Portfolio
  - Microsoft Exchange Server 2010 Enterprise
  - Microsoft Project Server 2010
  - Microsoft SharePoint Server 2010
- Microsoft Office
  - Microsoft Outlook 2010
- Microsoft Project Professional 2010

- Technologies
  - Microsoft Project Web App

Hardware
- HP ProLiant BL460c G1 blade server computer