



Work Globally. Store Locally. Communicate Securely.
Project Management for Virtual Teams

MS Project Synchronization with TeamDirection® Project

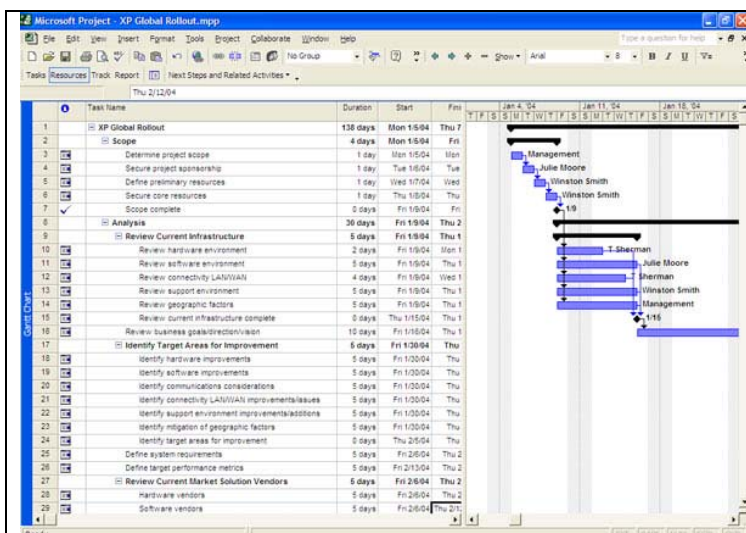
TeamDirection Project allows the import, export, and on-demand synchronization of a Microsoft (MS) Project and one or more TeamDirection (TD) Projects.

A number of functions are supported:

1. creation of a new TD Project from an entire MS Project or from any Summary Task in the task hierarchy
2. creation of a new MS Project from a TeamDirection Project
3. synchronization of data between the two project types wherein the project manager chooses the direction of synchronization

Sample Use Case

A Project Manager (PM) has planned the global roll-out of Microsoft XP to the organization's worldwide operations using Microsoft Project. Execution of the plan involves resources from corporate and three regional IT organizations, as well as external resources for both Administrator and End-user training classes.



The MS Project Plan


In this sample project there are two levels of sub-tasks as well as dependencies between tasks. A number of resources have been defined.

Since the roll-out will be executed concurrently in several regions using different resources, the PM has decided to create separate project plans for each region. A shared Groove Workspace is used to distribute technical information as well as host Discussions from which all team members, regardless of region, will benefit.

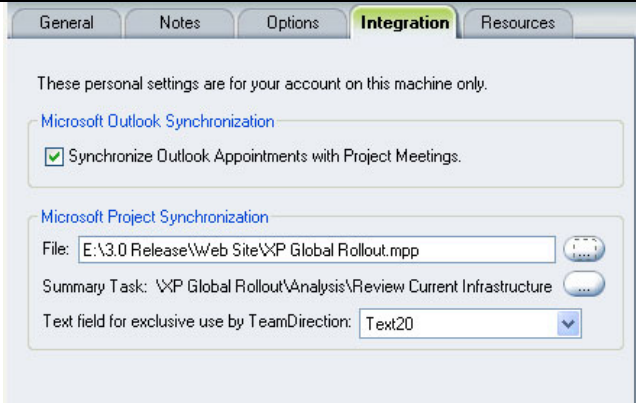
Files	XP Deployment Discussion	Dashboard	Americas Roll-out (1)	European Roll-out	Asia-Pacific Roll-out	Add Tool
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The Groove Workspace with Files tool for sharing information, a Discussion tool for resolving technical issues, three separate TeamDirection project plans (one for each regional roll-out), plus a TeamDirection Dashboard for a cross-project view.

At this point the Project Manager is ready to populate the three regional project plans from the original MS Project plan.

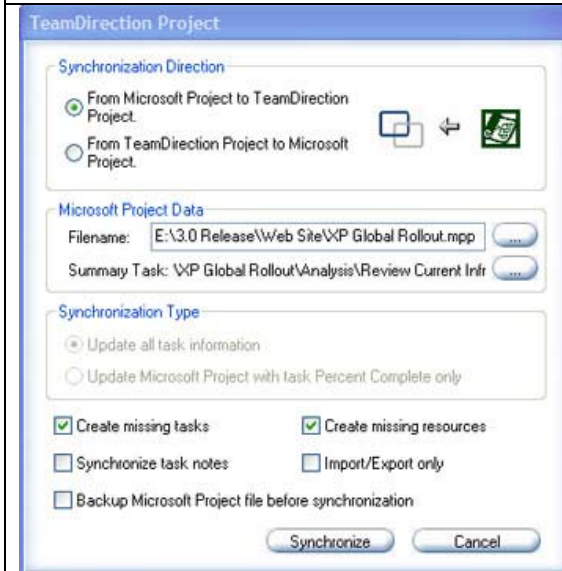
	<p>The leftmost toolbar button invokes MS Project synchronization from within TeamDirection Project.</p>
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The name of the MS Project file to synchronize with, as well as the Summary Task which will act as the top of the hierarchy to be imported, can be entered as part of the synchronization process, or can be set as defaults on the “Integration” tab, shown below.

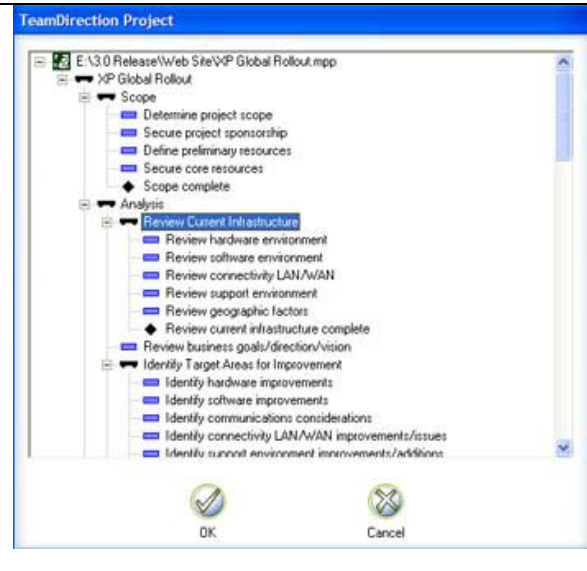
	<p>MS Project Synchronization Options</p> <p>The Project Manager (PM) can browse to the MS Project file to be imported, as well as specify the summary task. These are saved as defaults for the next time synchronization is run.</p>
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If these synchronization defaults have not been set previously, the user is prompted for them during the process.

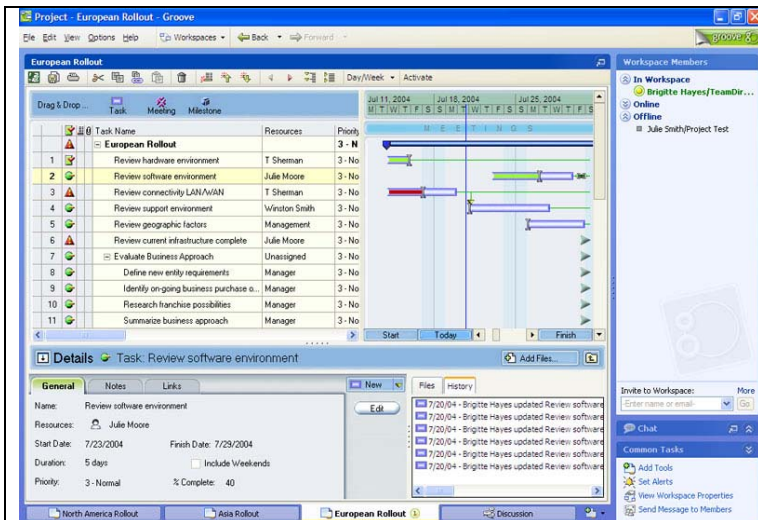
Specifying the direction of data flow.
 The Project Manager selects the direction of data flow from MS Project into TD Project. Typically on the first import, all tasks and resources would be created.



Selecting the import hierarchy. The Project Manager selects the Summary task that reflects the top of the hierarchy to be imported.



The Project Manager repeats this process three times, once for each region in its own copy of the TD Project tool. The end result is a separate project plan for each region in a single Groove workspace. Alternatively, the projects could have been imported into separate Groove shared spaces.



The TeamDirection Project “European XP Rollout” now has the task hierarchy and resources of the imported Summary task from MS Project. All task dependencies and percent completion have been maintained.

Once the PM has imported the tasks into TeamDirection Project, it is immediately apparent whether the project is on-schedule based on the status icons to the left of each task name (on-schedule, late or completed). The overall project has a late status since once of its tasks is overdue.

The resources assigned in MS Project are carried over to the TeamDirection Project as Display Names. The PM can now go into the TD Project Resource Pool and map these Display Names to real people, using their Groove IDs. For example, the original MS Project may have been a template with resources given names such as Admin1, TechSupport1, etc. After import, the Project Manager maps these names to the staff available to carry out these tasks in each region.

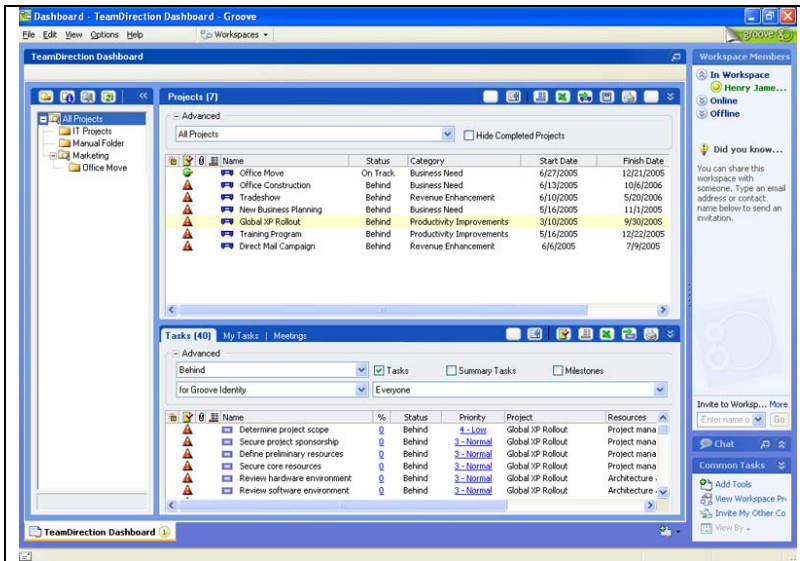
The Project Manager now uses the Resource Pool feature to assign real people to the resources carried over from the MS Project plan.

Display Name	Groove Identity	Task
TechSupport1	<None>	
Accountant	<None>	
Brigitte Hayes	Brigitte Hayes	
Business Advisor	<None>	
Julie Smith	Julie Smith	
Management	<None>	5
T Sherman	<None>	3

The invited team members can now enter the project, find their resource assignments, and report their status against these by using the graphical slider bar. The PM can elect to periodically synchronize the regional rollout projects back into the original MS project for global reporting.

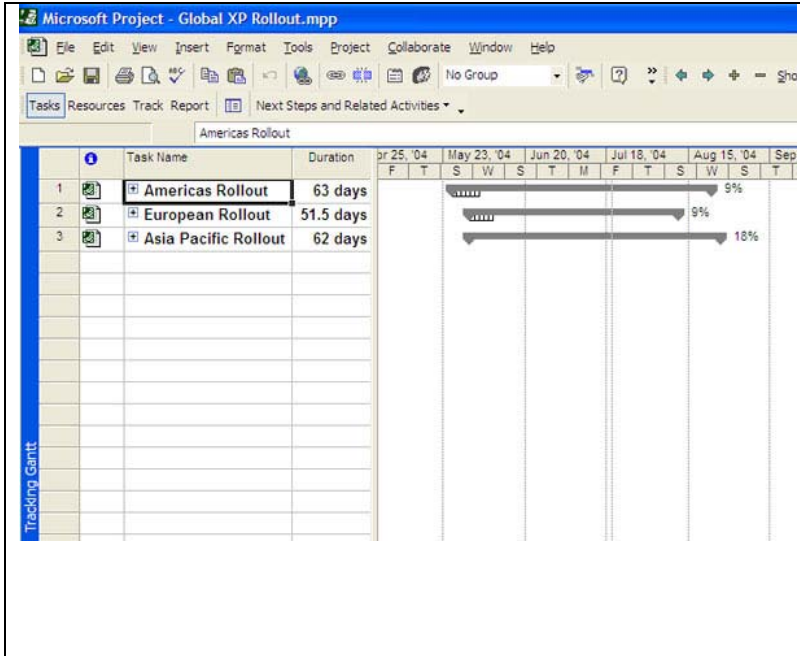
The Project Manager can at any time synchronize these individual TeamDirection projects back into the original MS Project, or export to a new MS Project file entirely.

In addition to monitoring each regional roll-out separately, the Project Manager has a need to check on the overall status of the roll-out globally. By using the TeamDirection Dashboard tool, the PM can monitor the situation across multiple projects, and across multiple spaces as well.



The Project Manager now uses the TeamDirection Dashboard tool each morning to view the status of all projects, and determine where efforts must be placed to stay on schedule. In the bottom pane, the PM has filtered on late tasks, thereby determining where to add or re-assign resources to get the rollout on track.

For reporting purposes, the PM would prefer to continue to use MS Project. He has therefore created a Global XP Rollout master project, and inserted the three regional rollout projects into it. Each regional rollout manager synchronizes his particular TeamDirection Project back to the matching Microsoft Project. The Program Manager views the master project to obtain an overview of how things are going globally with respect to the entire program, and how the individual projects are tracking, as well as with respect to each other.



The overall Program Manager for the worldwide XP rollout infrastructure program can now view the overall program progress by virtue of the three regional projects, all updated by the participants using TeamDirection Project, and synchronized to the individual mpp files by the Project Manager in each region.