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 Content Updates

# Electronic Addendum

## Proactive PPM with Microsoft Project 2016 for Project Online and Project Server

A best practices guide for project managers

*A practical approach to building schedules  
and managing projects with Microsoft PPM*

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### Electronic Addendum

Sensei Project Solutions is pleased to provide this electronic addendum to "Proactive PPM with Microsoft Project 2016 for Project Online and Project Server". As Microsoft continues to provide incremental updates and on-going improvements to Microsoft Project and Project Online, Sensei will provide supplementary content updates to the Project Manager's guide in this electronic addendum document.

This addendum will be updated based on changes introduced by Microsoft to Microsoft Project or Project Online that impact developing and maintaining project schedules. As a registered owner of this book, you will be notified by email when updates are issued.

When a specific change impacts several sections of the book, we will simply document the change once. For example, the addition of the agile boards impacts many chapters in this book. We have created a single, although significant update, which covers iterative management across the complete project life cycle.

In other instances, where a change from Microsoft explicitly changes a specific section of the book, we will call out the appropriate section and, in most instances, provide the replacement (or additional) text for impacted areas.

Finally, if you find items which you believe are wrong or out of date, please contact us to bring it to our attention. Email any updates or concerns to us at [info@senseiprojectsolutions.com](mailto:info@senseiprojectsolutions.com).

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Electronic Addendum

## 1. Addendum Updates 1 – January 2019

# 1.1. Managing Agile Projects

**Addendum at a Glance – Microsoft added Sprint Planning and Task Boards to allow you to manage tasks using a visual drag and drop approach similar to techniques defined for agile or iterative planning and management. These new boards and the ability to support iterative management are exciting new additions to Microsoft Project and make it an ideal tool for managing all projects in an organization, independent of the delivery approach. In this addendum we review:**

**Understanding both agile boards and schedule views**

**Starting an agile project**

**Developing the product backlog**

**Planning a sprint**

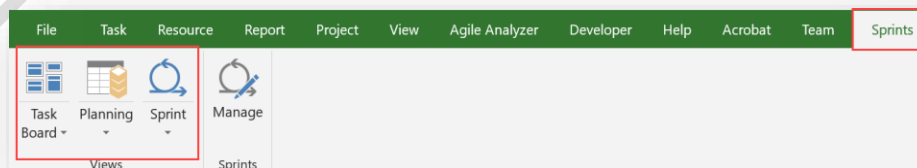
**Closing a sprint**

As more organizations move towards agile or iterative delivery approaches, having the ability to do visual board management is becoming more important to most organizations. The Backlog boards allow you to manage the project's backlog and schedule stories for completion in a specific sprint and the Sprint boards allow you to manage the status of each story within the current sprint to track the progression of the work within a sprint.

In addition, you can combine the visual boards with traditional Microsoft Project views to easily manage hybrid projects where some work will be managed using predictive or traditional methods while other work will be managed interactively using the visual boards.

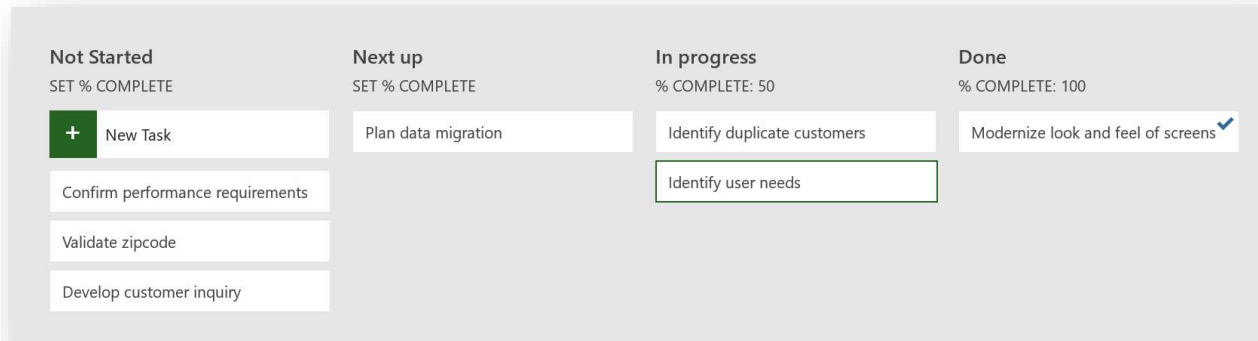
### 1.1.1. Microsoft Project Board Functionality

Microsoft has developed three visual boards in support of iterative management that can be accessed from the 'Sprint' ribbon.



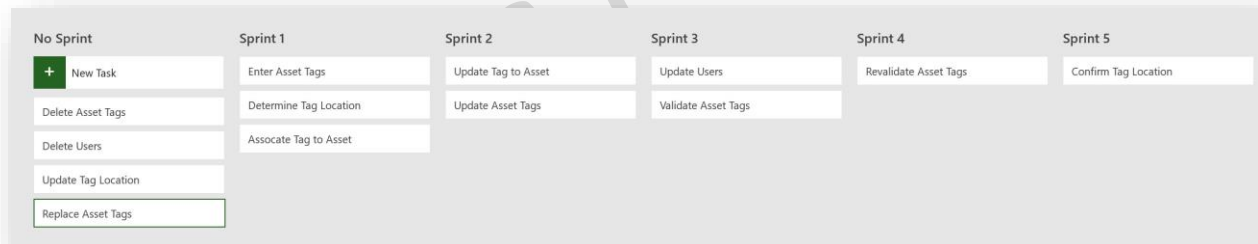
*Sprints ribbon*

The first board, referred to as the Task board, allows you to manage your work using a Kanban approach where the work can be managed based on defined states or status. This board shows all the iterative tasks in a project and supports continuous flow development where the number of stories in each state can be managed based on the team's capacity.



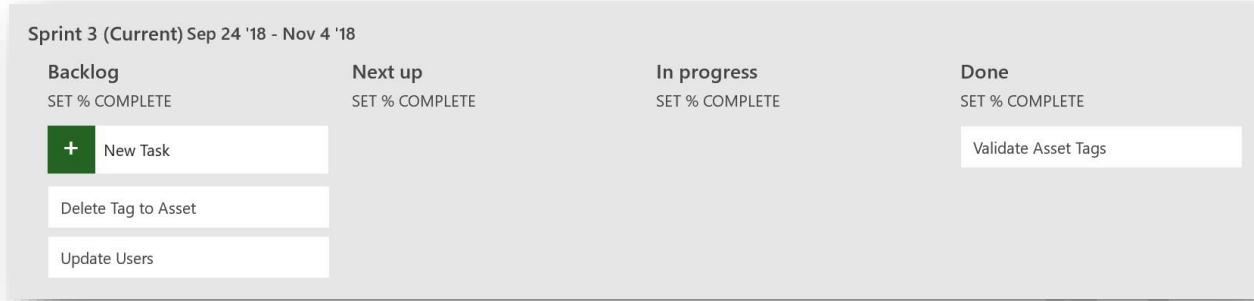
*Task Board*

The remaining boards are used for sprint based iterative development. The Sprint Planning Board allows you to assign a task to a specific sprint. You can allocate the work to sprints for completion based on priority and capacity of the team to complete the work.



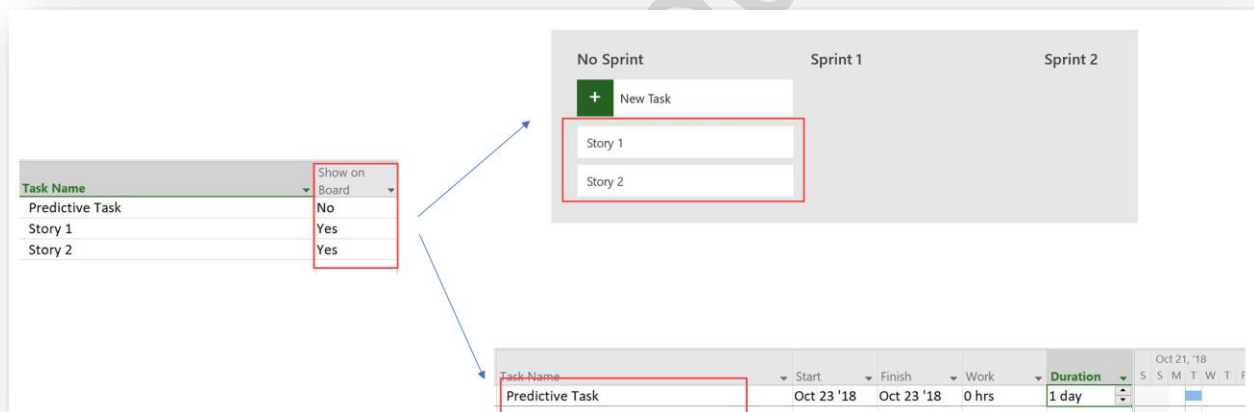
*Sprint Planning Board*

The final board, the Current Sprint Board, allows you to track the progress of the tasks being worked on within the current sprint. The Current Sprint Board is much the same as the Task Board as it allows you to track the process of the tasks. However, unlike the Task Board which shows all the iterative work in the project, the Current Sprint Board is filtered to show only the work being completed in the current sprint (based on 'Current date').



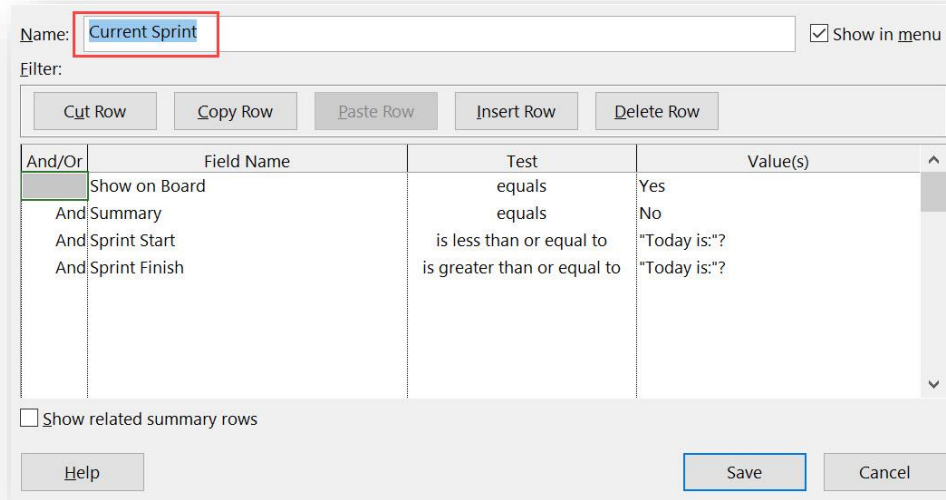
*Current Sprint Board*

A new task flag field named 'Show on Board' has also been added, which is used to control whether a task should be visible on these boards. When this flag is set to 'Yes' the task will show on all boards. Understanding how this flag controls the display on the boards is important as it allows you to distinguish between traditional tasks (not set) which should not show on the boards and story tasks (set) which should show on the boards.



*Filtering tasks based on 'Show on board' flag*

Microsoft has included additional filtering to exclude summary tasks, completed tasks, and inactivated tasks in the filters used in these boards as well.



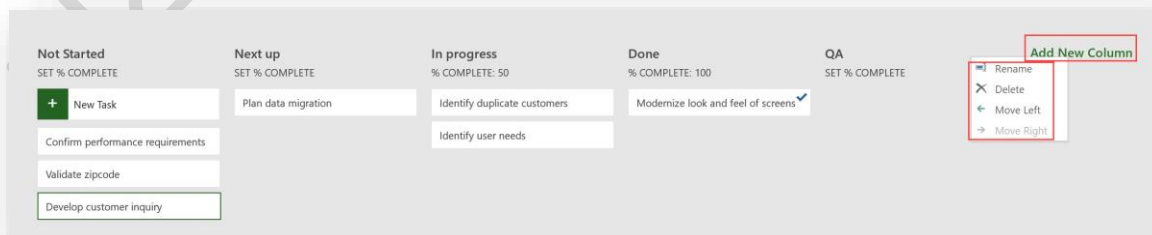
*Filter definition for Current Sprint board*

**Warning:**

You may experience these boards “losing” the filtering based on the ‘Show on Board’ field, resulting in all tasks in the project showing on the board. If this happens, you can either exit Microsoft Project and relaunch it to reapply the protected filter on these boards, or you can go to the ‘View ribbon’ and manually apply the appropriate built in filter for the specific board being used.

1.1.1.1. Using Board Views

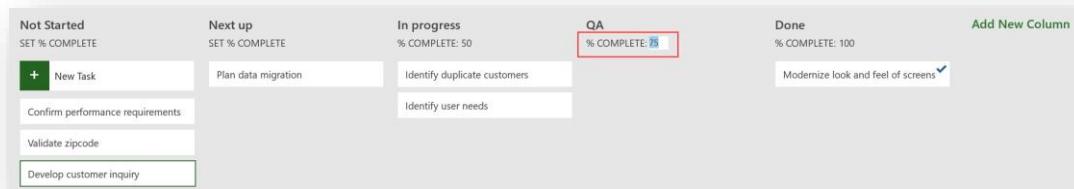
The Task Board and the Current Sprint Board can be configured to contain states or status that align to your organizational processes. To add a new state column to a board, click the ‘Add New Column’ link and then type the name of the new state into the dialog box. With the new column added, it can be repositioned by right-mouse clicking and selecting ‘Move Right/Left’ in the shortcut menu. Columns can be renamed, and unneeded columns can also be deleted using the same shortcut menu.



*Configure board columns*



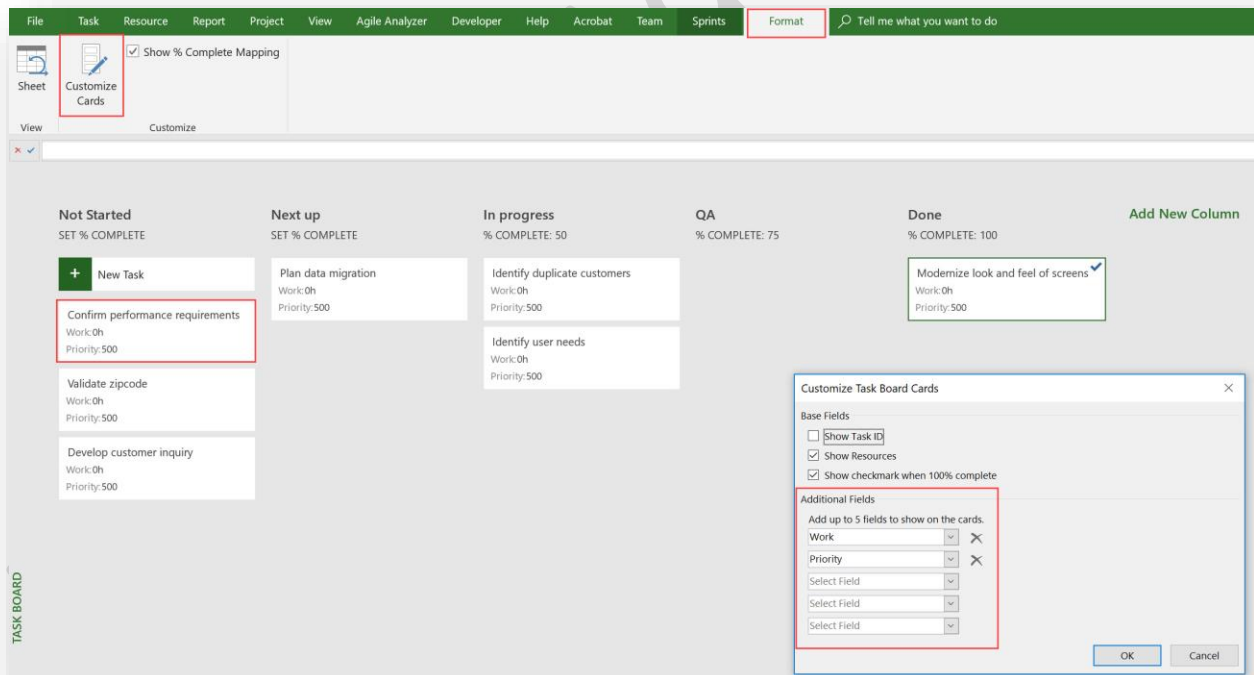
You also can set a ‘% complete’ for each column on the board. When a task is moved to the column, the ‘% complete’ for that task is set accordingly. At a minimum, we recommend setting the ‘Done’ column to reflect 100% complete. This facilitates ease of closing stories during the sprint retrospective.



Set column % complete

### 1.1.1.2. Configuring Cards on Board Views

You can add up to five additional fields (including Enterprise Custom Fields) to your task cards to ensure the most important information is visible on the cards. To configure the cards, from the ‘Format ribbon > Customize section’ select ‘Customize Cards’. Select the information you wish to have displayed on the cards in the ‘Customize Task Board Cards’ dialog and then click the ‘OK’ button.

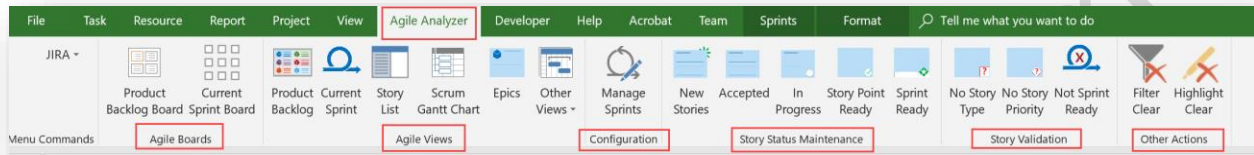


Configure task cards



### 1.1.2. Using the Sensei Agile PPM Add-In

Using the new board and sheet views, Sensei has created the Sensei Agile PPM add-in to Microsoft Project, which adds support for other core iterative development data and principles such as epics, story points, story status, type, and priority. A new ribbon, the Agile Analyzer, has been added to ensure the core functionality required for full iterative management is available on a single ribbon.



*Agile Analyzer ribbon*

Additional fields have been added with the Sensei Agile PPM add-in to collect additional iterative data typically required for iterative management, including the following:

Epic - A free form text field used for the association of stories to an epic.

Story Points - A numeric field to capture the story point estimate for the story.

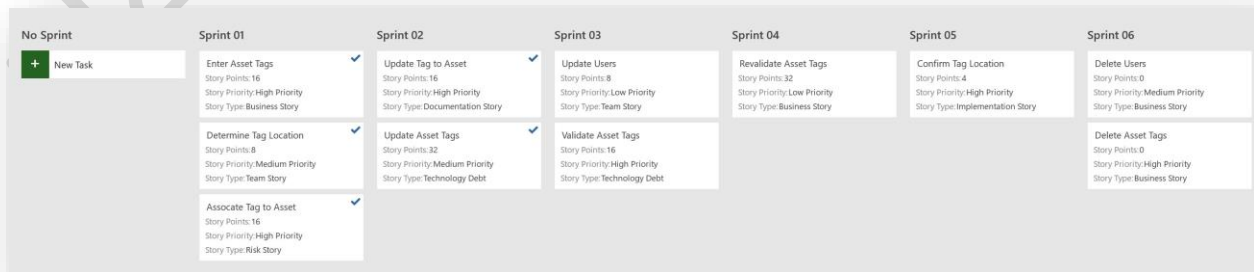
Story Priority - A table driven field used to define the business priority of the story.

Story Status – A table driven field used to define the current status of the story.

Story Type – A table driven field used to identify the type of story.

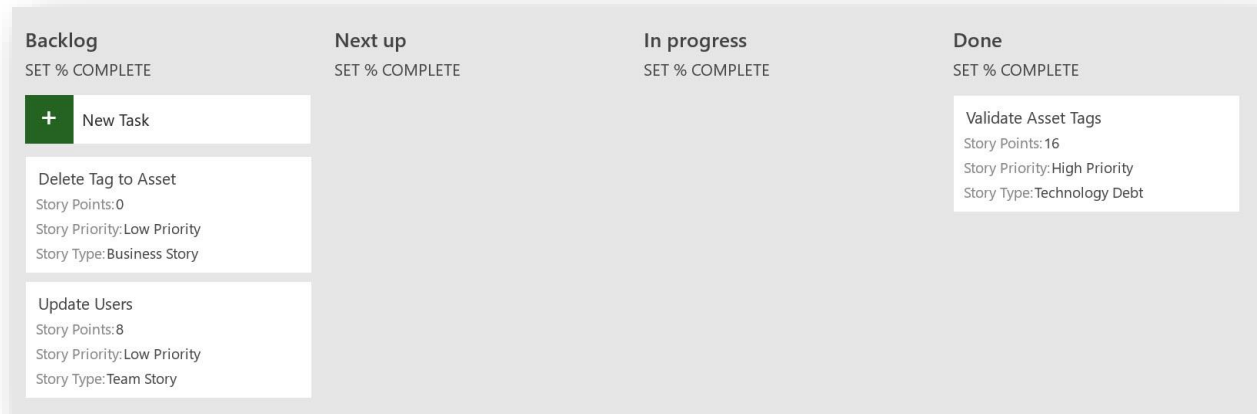
#### 1.1.2.1. Agile Boards

The Agile Boards section of the Agile Analyzer ribbon provides access to the two boards focused on sprint based iterative development. The AG31 - Product Backlog Board is based on the 'Sprint Planning Board' with additional configuration for the cards and filters to reflect the full set of data an organization would typically use to manage the project backlog.



*AG31 - Product Backlog Board*

The AG32 – Current Sprint Board is based on the ‘Current Sprint Board’ with additional configuration for the cards and filters to reflect the full set of data an organization would typically use to manage the stories within the current sprint. The stories in the current sprint are “calculated” by the system and reflects all iterative tasks where the ‘Current date’ aligns with the ‘Sprint Start Date’ and the ‘Sprint Finish Date’.



AG32 – Current Sprint Board

#### 1.1.2.2. Agile Views

The agile views use a traditional task sheet and are designed to provide support for additional iterative management approaches not available in the board views. The AG31 – Product Backlog sheet view allows you to view and maintain a broader set of information than the AG31 – Product Backlog Board. In this view, in addition to scheduling an iterative task into a specific sprint, you can also maintain Story Type, Story Priority, Story Status and Story Points. As this view sums the Story Points by Sprint, you can also maintain and validate that the total story point count for a sprint is consistent with the team’s capacity or velocity. In addition, by setting the Epic field, you can associate an individual iterative task with an Epic.

Name	Sprint	Show on Epic	Story Type	Story Priority	Story Status	Story Points
<b>Sprint: Sprint 01</b>	<b>Sprint 01</b>	<b>Yes</b>				<b>40</b>
Enter Asset Tags	Sprint 01	Yes	Business Story	High Priority	Sprint Rea	16
Determine Tag Location	Sprint 01	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete 8
Associate Tag to Asset	Sprint 01	Yes		Risk Story	High Priority	Sprint Rea 16
<b>Sprint: Sprint 02</b>	<b>Sprint 02</b>	<b>Yes</b>				<b>48</b>
Update Asset Tags	Sprint 02	Yes	Technology Debt	Medium Priority	Sprint Rea	32
Update Tag to Asset	Sprint 02	Yes		Documentation Story	High Priority	Story Poin 16
<b>Sprint: Sprint 03</b>	<b>Sprint 03</b>	<b>Yes</b>				<b>24</b>
Validate Asset Tags	Sprint 03	Yes	Technology Debt	High Priority	In Progres	16
Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progres 8
<b>Sprint: Sprint 04</b>	<b>Sprint 04</b>	<b>Yes</b>				<b>32</b>
Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted 32
<b>Sprint: Sprint 05</b>	<b>Sprint 05</b>	<b>Yes</b>				<b>4</b>
Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progres 4
<b>Sprint: Sprint 06</b>	<b>Sprint 06</b>	<b>Yes</b>				<b>0</b>
Delete Asset Tags	Sprint 06	Yes		Business Story	High Priority	Accepted 0
Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progres 0
<b>Sprint: Sprint 07</b>	<b>Sprint 07</b>	<b>Yes</b>				<b>0</b>
Replace Asset Tags	Sprint 07	Yes		Risk Story	Low Priority	In Progres 0
<b>Sprint: Sprint 08</b>	<b>Sprint 08</b>	<b>Yes</b>				<b>0</b>
Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted 0
Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted 0
<b>Sprint: Sprint 09</b>	<b>Sprint 09</b>	<b>Yes</b>				<b>0</b>
Delete Tag to Asset	Sprint 09	Yes		Business Story	Low Priority	Accepted 0
<b>Sprint: Sprint 10</b>	<b>Sprint 10</b>	<b>Yes</b>				<b>0</b>
Create Users	Sprint 10	Yes		Risk Story	Medium Priority	0
Delete Locatons	Sprint 10	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted 0
<b>Sprint: Sprint 11</b>	<b>Sprint 11</b>	<b>Yes</b>				<b>0</b>
Print Tag Inventory	Sprint 11	Yes		Documentation Story	Medium Priority	New 0
Update Locations	Sprint 11	Yes	Manage Inventory Locations	Team Story	High Priority	New 0

AG31 - Product Backlog sheet view

The AG32 – Current Sprint sheet view, much like the AG31 Product Backlog sheet view, allows you to view and maintain a broader set of information than the AG32 – Current Sprint Board. In this view, in addition to maintaining the ‘Board Status’, you can also view Story Type, Story Priority, Story Status and Story Points. Additionally, this view allows you to view or maintain any task status updates, specifically the ‘Work’, ‘Actual Work’ and ‘Remaining Work’. Maintaining these work data items is optional based on whether your organization wishes to maintain this level of detail for iterative projects.

If your organization wishes to maintain these work data items using either the PWA timesheet/task functionality or by directly maintaining these fields in Microsoft Project, the agile functionality is fully integrated ensuring that all projects, independent of delivery approach, can report consistent data across the organization. If, on the other hand, your organization chooses a more agile approach to tracking progress, these fields can be hidden, and you can simply record each iterative task as not-done or done (100% complete) as part of each sprint’s review and retrospective.

Name	Board Status	Epic	Story Type	Story Status	Story Points	Work	Actual Work	Remaining Work
<b>Board Status: Backlog</b>	<b>Backlog</b>					<b>8</b>	<b>0h</b>	<b>0h</b>
Update Users	Backlog		Team Story	In Progress	8	0h	0h	0h
Delete Tag to Asset	Backlog		Business Story	Accepted	0	0h	0h	0h
<b>Board Status: Done</b>	<b>Done</b>					<b>16</b>	<b>0h</b>	<b>0h</b>
Validate Asset Tags	Done		Technology Debt	In Progress	16	0h	0h	0h

AG32 – Current Sprint sheet view

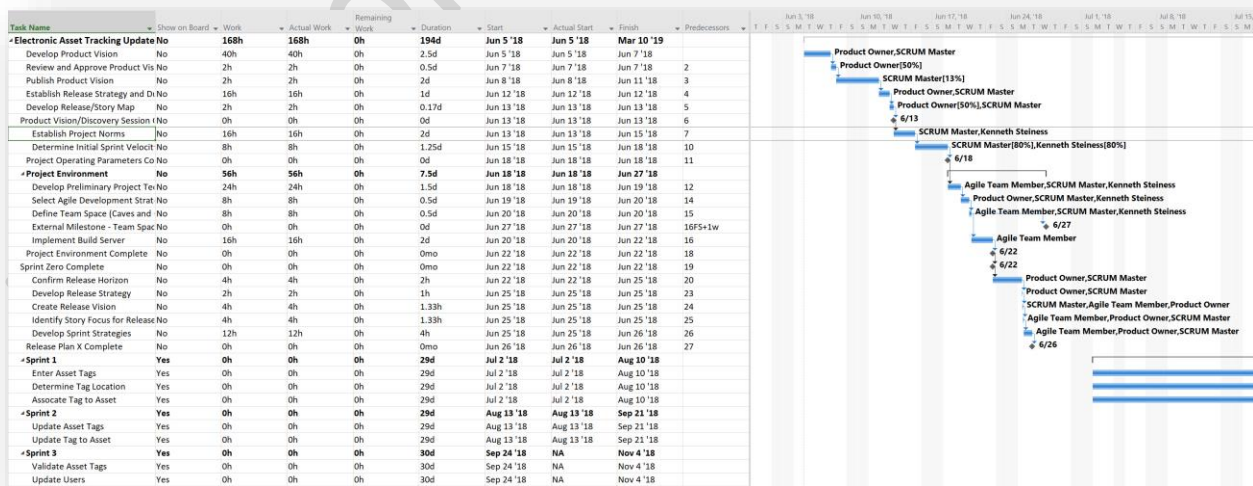


The AG33 – Story List view provides a “flat” list of all the iterative tasks in a project, with the ability to manipulate any of the iterative management fields, including Sprint, Epic, Board Status, Story Type, Story Status, Story Priority and Story Points.

Name	Sprint	Epic	Board Status	Story Type	Story Status	Story Priority	Story
Enter Asset Tags	Sprint 01		Next up	Business Story	Sprint Ready	High Priority	16
Determine Tag Location	Sprint 01	Manage Inventory Locations	In progress	Team Story	Complete	Medium Priority	8
Associate Tag to Asset	Sprint 01		Done	Risk Story	Sprint Ready	High Priority	16
Update Asset Tags	Sprint 02		Next up	Technology Debt	Sprint Ready	Medium Priority	32
Update Tag to Asset	Sprint 02		Done	Documentation Story	Story Point Ready	High Priority	16
Validate Asset Tags	Sprint 03		Done	Technology Debt	In Progress	High Priority	16
Update Users	Sprint 03		Backlog	Team Story	In Progress	Low Priority	8
Revalidate Asset Tags	Sprint 04		Next up	Business Story	Accepted	Low Priority	32
Confirm Tag Location	Sprint 05	Manage Inventory Locations	In progress	Implementation Story	In Progress	High Priority	4
Delete Asset Tags	Sprint 06		In progress	Business Story	Accepted	High Priority	0
Delete Users	Sprint 06		In progress	Business Story	In Progress	Medium Priority	0
Replace Asset Tags	Sprint 07		In progress	Risk Story	In Progress	Low Priority	0
Update Tag Location	Sprint 08	Manage Inventory Locations	Next up	Implementation Story	Accepted	High Priority	0
Define Locations	Sprint 08	Manage Inventory Locations	Done	Business Story	Accepted	Medium Priority	0
Delete Tag to Asset	Sprint 09		Backlog	Business Story	Accepted	Low Priority	0
Create Users	Sprint 10		In progress	Risk Story		Medium Priority	0
Delete Locations	Sprint 10	Manage Inventory Locations	Next up	Risk Story	Accepted	High Priority	0
Print Tag Inventory	Sprint 11		Next up	Documentation Story	New	Medium Priority	0
Update Locations	Sprint 11	Manage Inventory Locations	In progress	Team Story	New	High Priority	0

AG33 – Story List sheet

The AG34 – Scrum Gantt Chart view is a hybrid view which shows all the non-iterative tasks ('Show on Board' = No) as well as all the iterative tasks that have a 'Sprint Start Date' earlier than 'Current date'. This allows you to view any traditional tasks, perhaps for up-front planning or for back-end implementation, that don't fit into a sprint model as well as all iterative tasks completed in earlier sprints and in the current sprint. We describe this as the committed iterative work on the project. The iterative tasks for future sprints are not included in this view as they are not committed and based on agile principles, may never be completed during the life of the project.



AG34 – Scrum Gantt Chart view

The final view, the AG35 – Epic view, is intended for “viewing purposes only” and allows you to view what stories are associated with specific epics. While you can change any of the data visible on this view, we recommend using either the Product Backlog or Story List views for maintaining the data associated with iterative tasks as opposed to doing it in this view since it does not reflect the sprint status of these stories.

Name	Show on	Story Type	Story Priority	Story Status	Story Points
<b>4 Epic: Manage Inventory Locations</b>	<b>Yes</b>				<b>12</b>
Determine Tag Location	Yes	Team Story	Medium Priority	Complete	8
Confirm Tag Location	Yes	Implementation Story	High Priority	In Progress	4
Update Tag Location	Yes	Implementation Story	High Priority	Accepted	0
Define Locations	Yes	Business Story	Medium Priority	Accepted	0
Delete Locatons	Yes	Risk Story	High Priority	Accepted	0
Update Locations	Yes	Team Story	High Priority	New	0

AG34 – Epics

### 1.1.2.3. Story Status Maintenance

The Story Status Maintenance section of the ribbon is intended for the Product Owner or Scrum Master to support “story grooming” ensuring that the backlog is well managed and there are always stories ready for the next sprint.

As shown below, the “In Progress” button was selected, and it highlights in yellow using cell background formatting all the stories which are “In Progress”. Knowing what stories are under development by the subject matter experts, for example, being classified by type or priority, story card or definition of done, would be useful prior to a sprint planning session. This would allow the Product Owner to be able to find stories that should be “hurried up” to allow them to be candidates for the next sprint.

The screenshot shows the Agile Analyzer interface in Microsoft Project 2016. The 'Sprints' ribbon is active, and several buttons are highlighted with red boxes: 'New Stories', 'Accepted', 'In Progress', 'Story Point Ready', and 'Sprint Ready'. Below the ribbon is a table of stories organized by sprints. The table columns include Name, Sprint, Show on, Epic, Story Type, Story Priority, Story Status, and Story Points. The 'In Progress' button is highlighted in yellow for several stories, such as 'Validate Asset Tags' and 'Confirm Tag Location'.

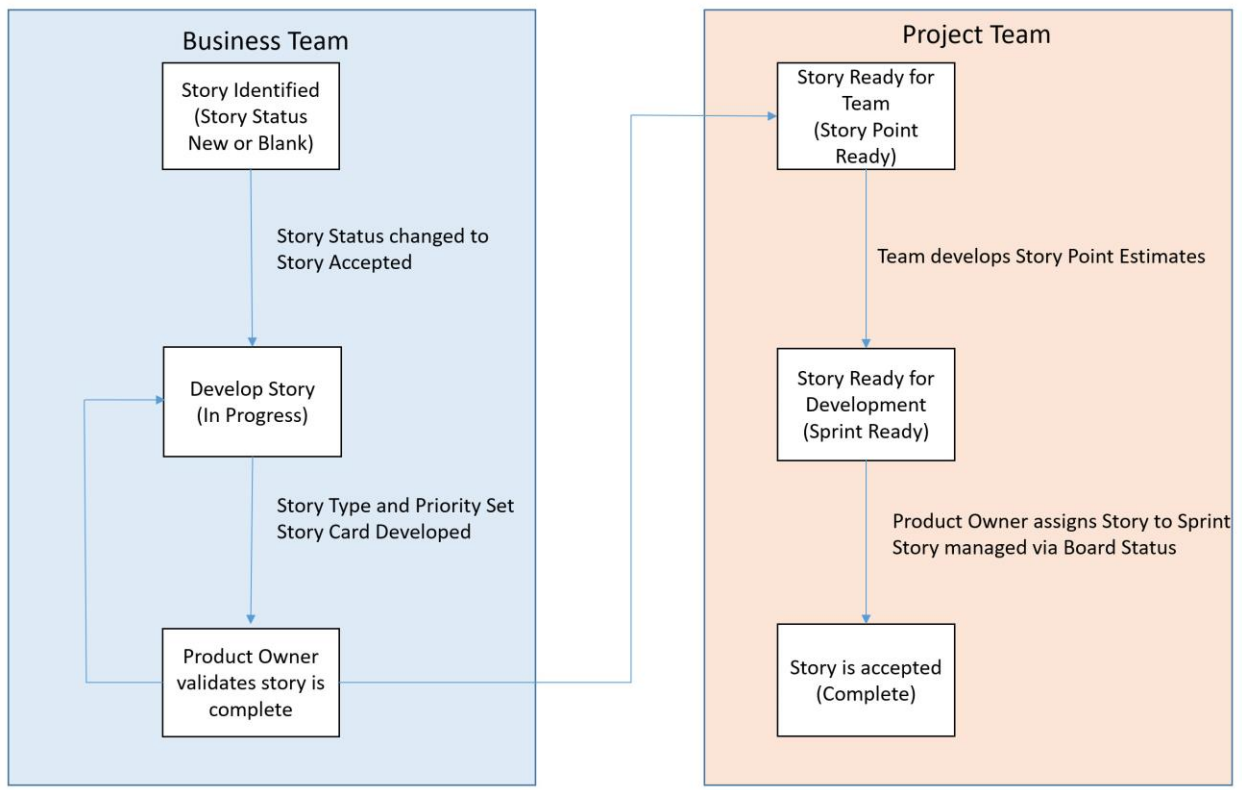
Name	Sprint	Show on	Epic	Story Type	Story Priority	Story Status	Story Points
<b>Sprint: Sprint 01</b>							
<b>Sprint: Sprint 01</b>							
31	Enter Asset Tags	Yes		Business Story	High Priority	Sprint Rea 16	
32	Determine Tag Location	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete 8	
33	Associate Tag to Asset	Yes		Risk Story	High Priority	Sprint Rea 16	
<b>Sprint: Sprint 02</b>							
<b>Sprint: Sprint 02</b>							
35	Update Asset Tags	Yes		Technology Debt	Medium Priority	Sprint Rea 32	
36	Update Tag to Asset	Yes		Documentation Story	High Priority	Story Point 16	
<b>Sprint: Sprint 03</b>							
<b>Sprint: Sprint 03</b>							
38	Validate Asset Tags	Yes		Technology Debt	High Priority	In Progress 16	
39	Update Users	Yes		Team Story	Low Priority	In Progress 8	
<b>Sprint: Sprint 04</b>							
<b>Sprint: Sprint 04</b>							
52	Revalidate Asset Tags	Yes		Business Story	Low Priority	Accepted 32	
<b>Sprint: Sprint 05</b>							
<b>Sprint: Sprint 05</b>							
54	Confirm Tag Location	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progress 4	
<b>Sprint: Sprint 06</b>							
<b>Sprint: Sprint 06</b>							
56	Delete Asset Tags	Yes		Business Story	High Priority	Accepted 0	
57	Delete Users	Yes		Business Story	Medium Priority	In Progress 0	
<b>Sprint: Sprint 07</b>							
<b>Sprint: Sprint 07</b>							
59	Replace Asset Tags	Yes		Risk Story	Low Priority	In Progress 0	
<b>Sprint: Sprint 08</b>							
<b>Sprint: Sprint 08</b>							
62	Update Tag Location	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted 0	
63	Define Locations	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted 0	
<b>Sprint: Sprint 09</b>							
<b>Sprint: Sprint 09</b>							
65	Delete Tag to Asset	Yes		Business Story	Low Priority	Accepted 0	
<b>Sprint: Sprint 10</b>							
<b>Sprint: Sprint 10</b>							
68	Create Users	Yes		Risk Story	Medium Priority	0	
69	Delete Locations	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted 0	
<b>Sprint: Sprint 11</b>							
<b>Sprint: Sprint 11</b>							
71	Print Tag Inventory	Yes		Documentation Story	Medium Priority	New 0	
72	Update Locations	Yes	Manage Inventory Locations	Team Story	High Priority	New 0	

*In Progress button*

The buttons in this section align to the agile story life cycle:

- **New Stories** – highlights all stories where the 'Story Status' is either blank or equal to 'New' and would be used to review and validate that the new stories are appropriate and should be included in the project.
- **Accepted** – highlights all stories where the 'Story Status' is "Accepted" and would be used to review stories as candidates for completion of the story card details.
- **In Progress** – highlights all stories where the 'Story Status' is "In Progress" and would be used to review all the stories where the story card is in progress, but not yet ready to be a candidate for sprint planning.
- **Story Point Ready** – highlights all stories where the 'Story Status' is "Story Point Ready" and would be used to identify all stories which have a complete story card and are candidates for story point estimating.
- **Sprint Ready** – highlights all stories where the 'Story Status' is "Sprint Ready" and would be used to identify all stories which have both a complete story card and story point estimates and are candidates for sprint planning.

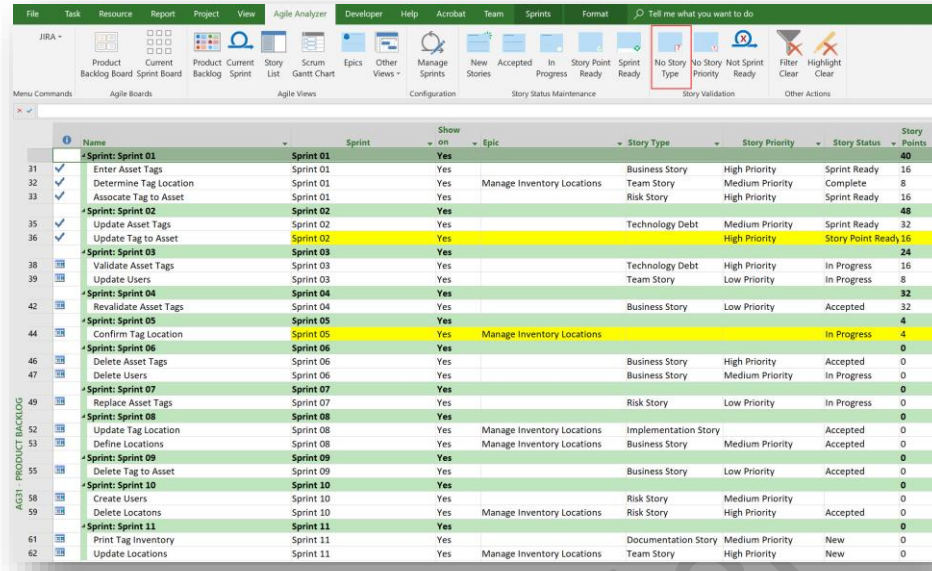




*Agile story life cycle*

#### 1.1.2.4. Story Validation

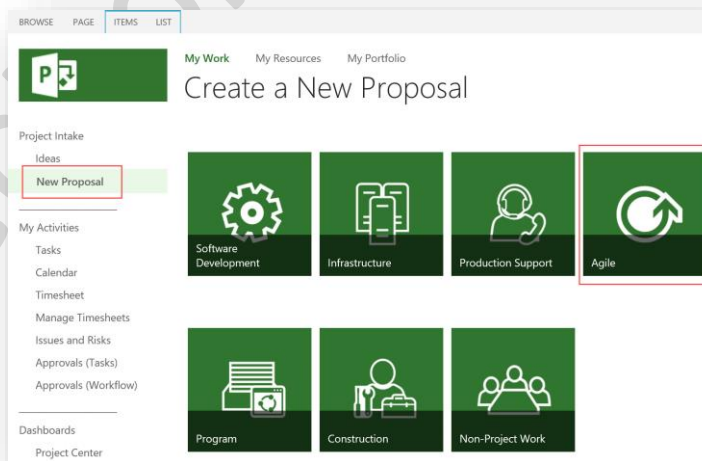
The Story Validation section of the ribbon contains three buttons for governance validations to ensure that all iterative tasks have the minimal data required to meet organizational standards. In the figure shown below, the No Story Type is clicked, which highlights several tasks missing a Story Type value. The other two buttons provide validations that confirm that the Story Priority is set and that all tasks which are defined as Sprint Ready are not missing any key data items.



No Story Type validation button

### 1.1.3. Starting an Agile Project

All projects should be started using an approved organizational project type. Therefore, assuming you are using Project Online, you should always start each new agile project on the 'Create a New Proposal' page in 'PWA' by selecting the appropriate Enterprise Project Type. This will ensure that the appropriate workflow, project detail pages, and templates are applied to your project.

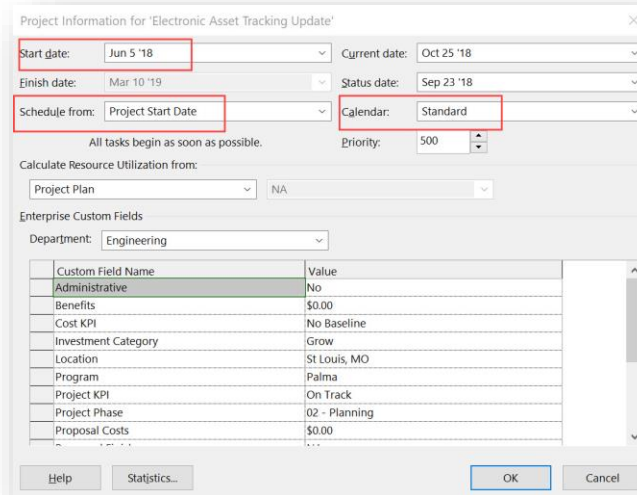


Create new agile project

This will create a new project in Project Online following your organizational standards. If you are using Microsoft Project standalone, select an appropriate template from the 'Backstage > New page'.

### 1.1.3.1. Setting Agile Sprints

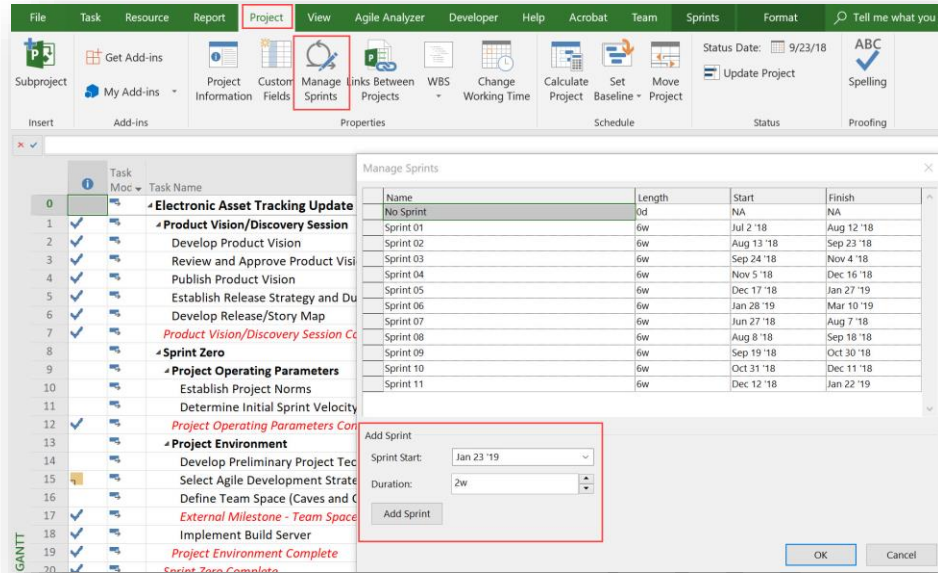
With the project created in PWA, we now open it in Microsoft Project desktop to complete the core planning activities. As with any project, the first step is to define the project in the 'Project Information' dialog, specifically the 'Start date', 'Schedule from' and 'Calendar' fields.



*Set Project level fields*

Next, from the 'Project ribbon > Properties section', click the 'Manage Sprints' button and define the Sprint details in the 'Manage Sprints' dialog. First set the 'Duration', then set the 'Sprint Start' date if it is different than the project 'Start date'. Click the 'Add Sprint' button in the dialog to create as many sprints as you believe the project will require.

You can rename the sprints in this dialog to make them more descriptive. Click the 'OK' button when finished.



Manage Sprints dialog

**Caution:**

The project calendar is not used when creating sprints. Sprints are always created based on a fixed duration independent of the number of working days in the period.

Tips and Hints:

If your organization adjusts the sprint dates to accommodate statutory holidays and other non-working time, only create as many sprints needed to take you to the first sprint that contains non-working time. Adjust the Start/Finish dates and then continue to create sprints until the next non-working time period.

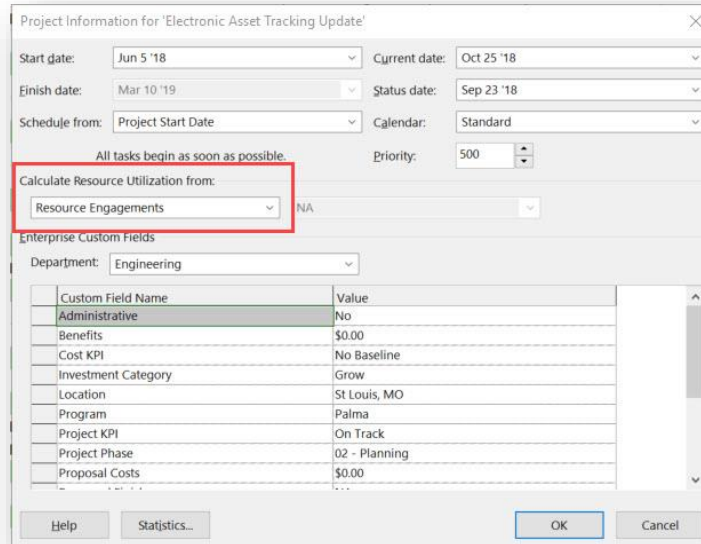
Tips and Hints:

If you rename your sprints, we recommend prefixing the sprint number at the beginning to ensure that any views which you sort/group by sprint name will remain in chronological order. For example, "01 – Identify Customer, 02 – Capture Order Details".

1.1.3.2. Using Resource Engagements on an Agile Project

Because agile projects are planned iteratively, most organizations will use Resource Engagements with named resources to ensure the team is committed to the project at the appropriate allocation, independent of iterative task assignments. Resource engagements for iterative projects are created using the same process as predictive projects. See Section 4.10 Creating Resource Engagements for Named Resources in this book for more details.

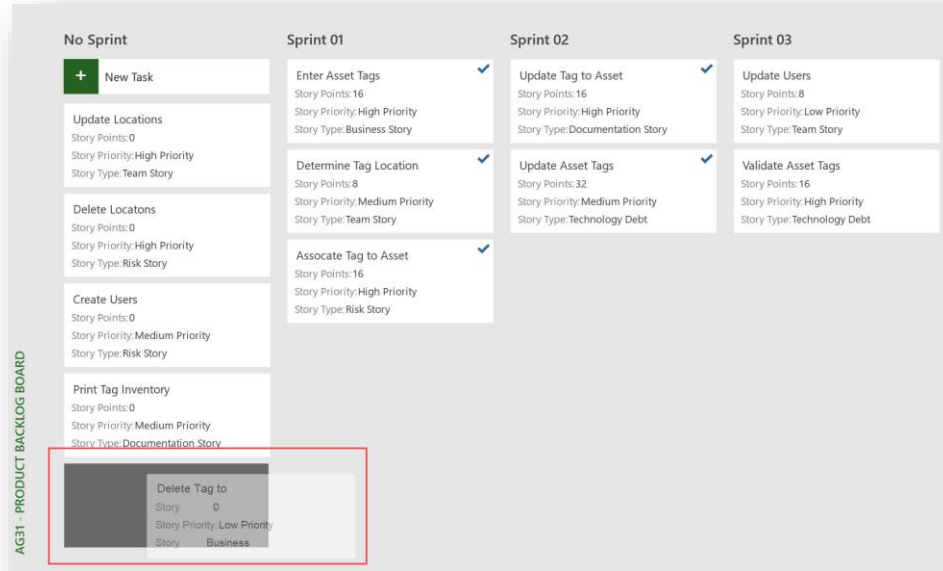
Resource engagements for named resources should be created for each team member on the iterative project and should cover the duration of the project to ensure that the capacity demand of each team member reflects the unplanned work for future sprints. Once the resource engagements have been submitted, you need to ensure that 'Calculate Resource Utilization from' value is set to 'Resource Engagements'. From the 'Project ribbon > Properties section' click the 'Project Information' button. In the Project Information dialog, ensure that the 'Calculate Resource Utilization from' value is set to 'Resource Engagements', and then click the 'OK' button.



*Ensure Resource Engagements is selected*

#### 1.1.4. Developing the Product Backlog

Maintaining the product backlog can be as simple as dragging and dropping stories into the appropriate sprint column using the AG31 – Product Backlog Board. This will schedule the story for work in that sprint.



*Drag and drop stories to manage the product backlog*

If you need to maintain additional detail on the stories, such as Story Priority, Story Type or Story Points, the AG31 – Product Backlog view would be more appropriate. In this view you can also assign stories to a sprint using the drop-down list in the Sprint column. Also, in this view, you can maintain any of the other fields to ensure full details of each story are available to help the Scrum Master or Product Owner maintain the product backlog.

Name	Sprint	Show on	Epic	Story Type	Story Priority	Story Status	Story Points
<b>Sprint: No Sprint</b>	<b>No Sprint</b>	<b>Yes</b>					<b>0</b>
Delete Tag to Asset	No Sprint	Yes		Business Story	Low Priority	Accepted	0
Create Users	No Sprint	Yes		Risk Story	Medium Priority		0
Delete Locations	No Sprint	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted	0
Print Tag Inventory	No Sprint	Yes		Documentation Story	Medium Priority	New	0
Update Locations	No Sprint	Yes	Manage Inventory Locations	Team Story	High Priority	New	0
<b>Sprint: Sprint 01</b>	<b>Sprint 01</b>	<b>Yes</b>					<b>40</b>
Enter Asset Tags	Sprint 02	Yes		Business Story	High Priority	Sprint Rea	16
Determine Tag Location	Sprint 04	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete	8
Associate Tag to Asset	Sprint 06	Yes		Risk Story	High Priority	Sprint Rea	16
<b>Sprint: Sprint 02</b>	<b>Sprint 02</b>	<b>Yes</b>					<b>48</b>
Update Asset Tags	Sprint 08	Yes		Technology Debt	Medium Priority	Sprint Rea	32
Update Tag to Asset	Sprint 09	Yes		Documentation Story	High Priority	Story Poin	16
<b>Sprint: Sprint 03</b>	<b>Sprint 03</b>	<b>Yes</b>					<b>24</b>
Validate Asset Tags	Sprint 05	Yes		Technology Debt	High Priority	In Progress	16
Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progress	8
<b>Sprint: Sprint 04</b>	<b>Sprint 04</b>	<b>Yes</b>					<b>32</b>
Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted	32
<b>Sprint: Sprint 05</b>	<b>Sprint 05</b>	<b>Yes</b>					<b>4</b>
Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progress	4
<b>Sprint: Sprint 06</b>	<b>Sprint 06</b>	<b>Yes</b>					<b>0</b>
Delete Asset Tags	Sprint 06	Yes		Business Story	High Priority	Accepted	0
Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progress	0
<b>Sprint: Sprint 07</b>	<b>Sprint 07</b>	<b>Yes</b>					<b>0</b>
Replace Asset Tags	Sprint 07	Yes		Risk Story	Low Priority	In Progress	0
<b>Sprint: Sprint 08</b>	<b>Sprint 08</b>	<b>Yes</b>					<b>0</b>
Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted	0
Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted	0

*Maintain product backlog in view mode*



### 1.1.4.1. Creating and Managing Epics

Traditionally there is no work associated with an epic (as the work is all done in the stories), so there is no need to create a task in Microsoft Project for Epics. To create an Epic, you simply have to enter the name of the Epic into the 'Epic' column in any of the agile views. We find that the 'AG31 – Product Backlog' view works very well for associating stories to an Epic.

Name	Sprint	Show on	Epic	Story Type	Story Priority	Story Status	Story Points
<b>Sprint: Sprint 01</b>							
Enter Asset Tags	Sprint 01	Yes		Business Story	High Priority	Sprint Rea	16
Determine Tag Location	Sprint 01	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete	8
Associate Tag to Asset	Sprint 01	Yes		Risk Story	High Priority	Sprint Rea	16
<b>Sprint: Sprint 02</b>							
Update Asset Tags	Sprint 02	Yes	Maintain Asset Tags	Technology Debt	Medium Priority	Sprint Rea	32
Update Tag to Asset	Sprint 02	Yes	Maintain Asset Tags	Documentation Story	High Priority	Story Point	16
<b>Sprint: Sprint 03</b>							
Validate Asset Tags	Sprint 03	Yes	Maintain Asset Tags	Technology Debt	High Priority	In Progress	16
Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progress	8
<b>Sprint: Sprint 04</b>							
Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted	32
<b>Sprint: Sprint 05</b>							
Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progress	4
<b>Sprint: Sprint 06</b>							
Delete Asset Tags	Sprint 06	Yes	Maintain Asset Tags	Business Story	High Priority	Accepted	0
Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progress	0
<b>Sprint: Sprint 07</b>							
Replace Asset Tags	Sprint 07	Yes	Maintain Asset Tags	Risk Story	Low Priority	In Progress	0
<b>Sprint: Sprint 08</b>							
Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted	0
Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted	0
<b>Sprint: Sprint 09</b>							
Delete Tag to Asset	Sprint 09	Yes		Business Story	Low Priority	Accepted	0
<b>Sprint: Sprint 10</b>							
Create Users	Sprint 10	Yes		Risk Story	Medium Priority		0
Delete Locatons	Sprint 10	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted	0
<b>Sprint: Sprint 11</b>							
Print Tag Inventory	Sprint 11	Yes		Documentation Story	Medium Priority	New	0
Update Locations	Sprint 11	Yes	Manage Inventory Locations	Team Story	High Priority	New	0

Associate stories with an Epic

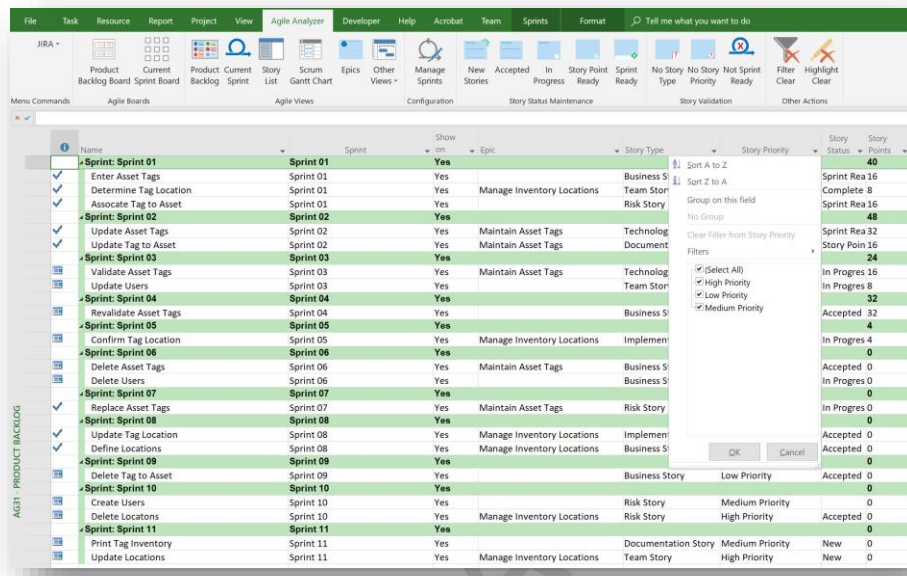
You will notice in the preceding figure, this allows you to complete the stories for the epic over many sprints. You can view the status of epics using the 'AG35 – Epic' view.

Task Name	Show on	Story Type	Story Priority	Story Status	Story Points
<b>Epic: Maintain Asset Tags</b>					
Update Asset Tags	Yes	Technology Debt	Medium Priority	Sprint Ready	32
Update Tag to Asset	Yes	Documentation Story	High Priority	Story Point Ready	16
Validate Asset Tags	Yes	Technology Debt	High Priority	In Progress	16
Delete Asset Tags	Yes	Business Story	High Priority	Accepted	0
Replace Asset Tags	Yes	Risk Story	Low Priority	In Progress	0
<b>Epic: Manage Inventory Locations</b>					
Determine Tag Location	Yes	Team Story	Medium Priority	Complete	8
Confirm Tag Location	Yes	Implementation Story	High Priority	In Progress	4
Update Tag Location	Yes	Implementation Story	High Priority	Accepted	0
Define Locations	Yes	Business Story	Medium Priority	Accepted	0
Delete Locatons	Yes	Risk Story	High Priority	Accepted	0
Update Locations	Yes	Team Story	High Priority	New	0

Associate stories with an Epic

### 1.1.5. Planning a Sprint

While you can associate stories with a sprint in either of the Product Backlogs (board or view), the 'AG31 – Product Backlog' view is very practical for sprint planning. It allows you to assign a story to a sprint, validate the story points assigned to the sprint, and validate the readiness of the story to be assigned to a sprint.



*Sprint planning using the Product Backlog view*

The 'AG31 – Product Backlog' view allows you to apply column filters (on the 'Story Type' or 'Story Priority' columns) to find the optimal stories for each sprint that have a 'Story Point' total count that is consistent with the team's velocity. In addition, this view supports the Story Status Maintenance and Story Validation buttons to facilitate sprint planning. With the appropriate stories assigned to the upcoming sprint(s), agile sprint planning is complete.

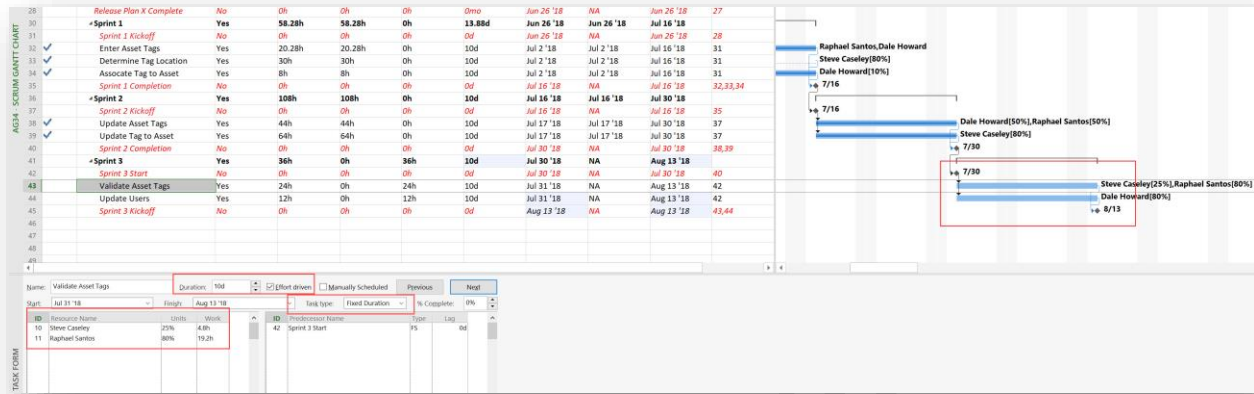
#### 1.1.5.1. Maintaining Story Details

Although optional, you may also want to consider maintaining other information related to the story to leverage the full functionality of Microsoft PPM which supports enterprise resource management and portfolio reporting. The Product Backlog and Sprint boards/views use the 'Sprint Start' and 'Sprint Finish' date fields to manage and assign stories to Sprints (as discussed in the 'Developing the product backlog' section). Many organizations also leverage the full functionality of Microsoft Project to schedule the completion of the stories (or tasks in traditional Microsoft Project terminology) so that team member's timesheets are complete, and that organizational project, program and portfolio reports are accurate and include the agile work packages.

To do this, it is also important to ensure that the detailed tasks for each story are properly defined including the task type, Start/Finish dates and resource allocations. While you can maintain the task details in any view, including using the 'Task Information' dialog and the 'Task Entry' view (split view),



we find the 'AG34 – Scrum Gantt Chart' view works well for this purpose as it is filtered to show only those stories that are either complete or scheduled for work in the current sprint. The following figure shows a split view with the 'AG34 – Scrum Gantt Chart' view in the top pane and the 'Task Form' view in the bottom pane.



Story details

While the level of traditional Microsoft Project discipline applied to Stories will vary by organization, in general consideration should be given to the following:

- WBS structure and Summary tasks – While optional, we recommend creating a Summary Task for each Sprint and organizing the committed stories under the appropriate summary task. These summary tasks should be one-to-one with the Sprints defined in the 'Manage Sprints' dialog. However, there is no direct connection between these, so it is important to manually ensure that they align.
- Dependencies – We recommend using Sprint Start and Sprint Finish milestones which allow you to schedule each sprint sequentially while also allowing you to associate all stories within a sprint for completion in the appropriate timeframe.
- Task type – While Stories can follow the conventional work-based philosophy and use the 'Fixed Work' task type, we find using 'Fixed Duration' and 'Effort Driven' where the task's 'Duration' is always the same as the sprint duration, fits the agile management principles best. This ensures the work is allocated to the proper timeframe, i.e. a 2-week sprint, while still allowing the team to self-organize and manage when the story will be completed during the daily standup.
- Resource assignment – While optional for overall management of agile sprints, if you want stories to appear on team member's timesheets you must assign the appropriate team member(s) to each story to associate the work to a resource. As there is an expectation that the team will "self-manage" within a sprint, we recommend initially assigning all appropriate team members to each story to populate timesheets, recognizing that, in reality, the team may elect to complete the work slightly different during the daily-standups. Team members who do not actually work a story would then simply zero out the remaining work on their timesheets.

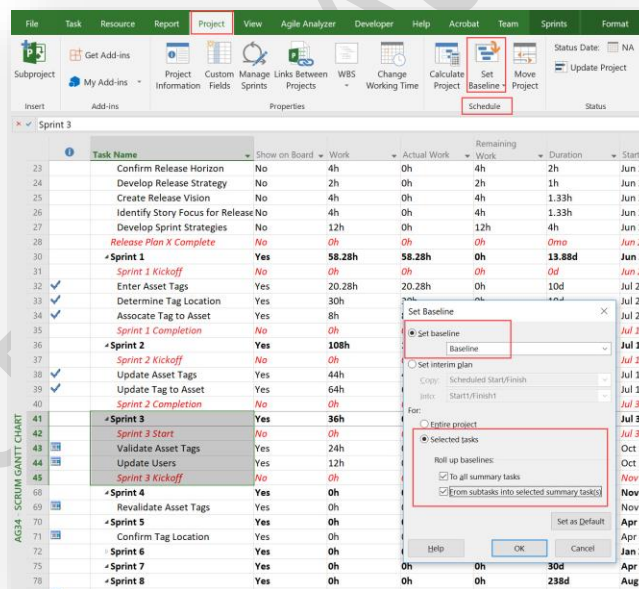
- Work estimation – Similar to resource assignment, while this is optional for overall management of agile sprints, it is required if you want to use timesheets to track work on the stories. As there is no direct relationship between the story point estimation for a story and the hours estimated for the specific resource(s) assigned to a task, a rough-ballpark estimate of hours is sufficient to ensure the team member(s) are able to track progress on their timesheets.

**Caution:**

‘Sprint Start’ and ‘Sprint Finish’ are used exclusively in the Agile Boards and do not set or maintain the task ‘Start’ and ‘Finish’ dates. As a result, we recommend using Milestones and traditional Microsoft Project dependencies to schedule the stories for timesheets and organizational reporting.

1.1.5.2. Baselining Agile Projects

As agile projects are planned iteratively, they should also be baselined iteratively. To do this, you select the new stories (and any other work) committed to the next sprint and then from the ‘Project ribbon > Schedule section’, click the ‘Set Baseline’ pick list button and select the ‘Set Baseline’ item on the pick list. In the ‘Set Baseline’ dialog, ensure the ‘Set baseline’ radio button is selected, and ‘Baseline’ is selected from the list at the top of the dialog. Change the ‘For’ option to ‘Selected tasks’ and ensure both checkboxes are selected and then click the ‘OK’ button.



*Set sprint baseline*

This will incrementally increase the baseline for each sprint as it is planned and rollup the new sprint details to all summary tasks, including to the ‘Project Summary Task’.

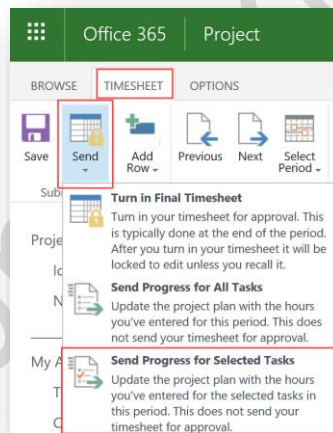
You should always set the baseline for each new sprint using this method as it will preserve any delivery variances in the project to date and will incrementally increase the approved project baseline to include the new sprint details.

### 1.1.6. Closing a Sprint

As part of each sprint's retrospective you should ensure that all stories are either completed or returned to the product backlog.

#### 1.1.6.1. Closing Completed Stories

If your organization is using timesheets (or tasks) in PWA, and your sprint ends on a different day than the timesheet period, it is recommended that you use the 'Send Progress for Selected Tasks' function to have each team member provide an update on all work completed in the sprint. To do this, just prior to the retrospective, the team members would follow organizational timesheet policies to track all of their time to-date, but would then select only the lines associated with the stories for the project, and from the 'Timesheet ribbon > Submit' section, click the 'Send' pick list button and then select the 'Send Progress for Selected Tasks' item in the menu. As the Status Manager for these tasks, you can review and accept the updates which should update the status of all completed stories to 100%.



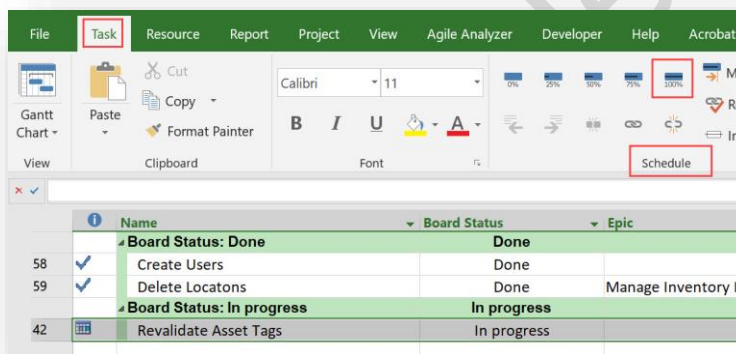
*Submit end of sprint updates*

Alternatively, if you are not using timesheets/tasks updates to record status of your agile projects, you can simply update the '% Complete' field to 100% for all completed stories directly in Microsoft Project. The easiest way to do this is to simply drag and drop all completed stories to the 'Done' column in the 'AG32 – Current Sprint Board'.



*Completing stories during the sprint retrospective*

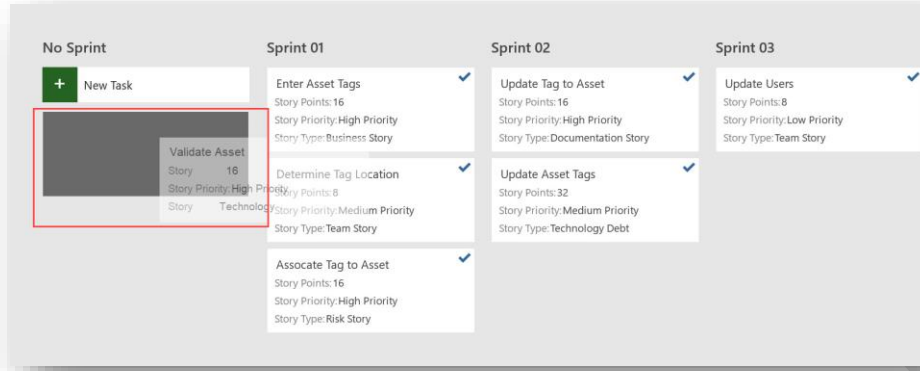
Alternatively, you can use the '100% Complete' button on the 'Task ribbon > Schedule' section to mark selected stories complete.



*Completing stories using the Task ribbon*

#### 1.1.6.2. Returning Incomplete Stories to the Product Backlog

Consistent with agile principles, any stories not completed at the end of a sprint should be returned to the product backlog for completion in a future sprint. The 'AG31 – Product Backlog Board' works well for this as it allows you to drag and drop the not completed stories to the 'No Sprint' column. Alternatively, you can assign the story to any future sprint if the Product Owner has already determined which sprint the story should be assigned to.



*Return uncompleted stories to the product backlog*

It's also an option to use the 'AG31 – Product Backlog' view to return incomplete stories to the product backlog.

Once the story is scheduled into a future sprint, you would follow the standard processes described above for planning a sprint.

Unlike agile principles, which state that a story is either complete or not-started, due to the way that Microsoft Project tracks any work completed on a story, the story (task) start dates will always reflect the actual start date when work was started during the original sprint, and cannot be changed as this preserves the work done to date on the story. When the story is rescheduled to a future sprint, the original start dates will be preserved, and the tasks duration will be extended to reflect that work took place over multiple sprints.

Task Mode	Task Name	Work	Duration	Start	Finish	Add New Column	Details	10/14	10/21	10/28	11/4	11/11
	← Sprint 3	24h	78d	Jul 30 '18	Nov 16 '18				12h	12h		
	Sprint 3 Start	0h	0d	Jul 30 '18	Jul 30 '18	Completed Story			12h	12h		
✓	← Validate Asset Tags	24h	10d	Oct 22 '18	Nov 4 '18		Work		12h	12h		
	Steve Caseley	4.8h		Oct 22 '18	Nov 2 '18		Act. Wc		12h	12h		
	Raphael Santos	19.2h		Oct 22 '18	Nov 2 '18		Work		2.4h	2.4h		
							Act. Wc		2.4h	2.4h		
							Work		9.6h	9.6h		
							Act. Wc		9.6h	9.6h		
	Sprint 3 Kickoff	0h	0d	Nov 16 '18	Nov 16 '18		Work					
	← Sprint 4	171.86h	20d	Oct 22 '18	Nov 16 '18	In-complete Story			7.1h	0.26h	82.5h	82h
	← Update Users	11.86h	20d	Oct 22 '18	Nov 16 '18		Work		7.1h	0.26h	2.5h	2h
	Dale Howard	11.86h		Oct 22 '18	Nov 16 '18		Act. Wc		7h			
							Work		7.1h	0.26h	2.5h	2h
							Act. Wc		7h			
	← Revalidate Asset Tags	160h	10d	Nov 5 '18	Nov 16 '18	New Story	Work				80h	80h
	Raphael Santos	80h		Nov 5 '18	Nov 16 '18		Act. Wc				40h	40h
							Work				40h	40h
							Act. Wc				40h	40h
							Work				40h	40h
							Act. Wc				40h	40h

*Understanding incomplete stories*

### 1.1.6.3. Confirming Agile Resource Engagements

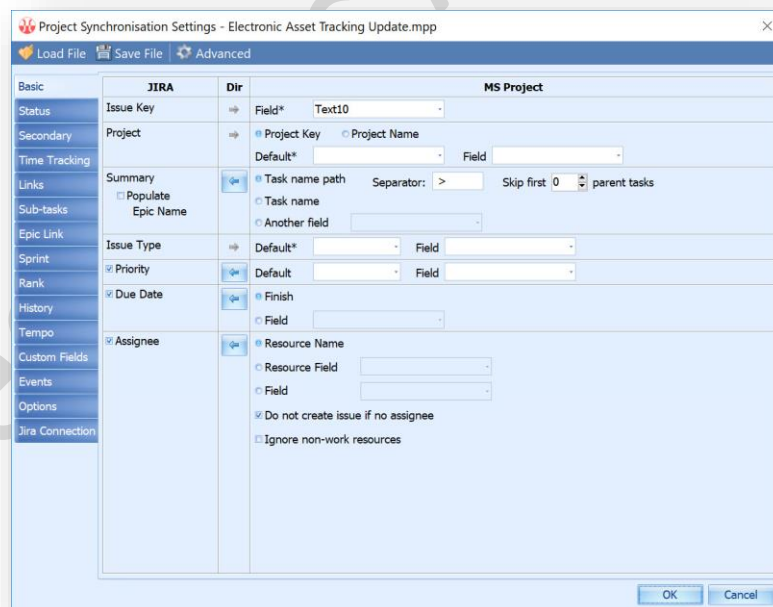
Based on the Product Owner changing the duration of the agile project, you will need to adjust the existing resource engagements for the named resources assigned to your project. As discussed in the Planning a Sprint section above, agile uses the standard functionality for resource engagements and you can follow the instructions in Section 6.4.2 Responding to Out of Compliance Resource Engagements, in this book for more details.

### 1.1.7. Integration with Other Agile tools

As many organizations have significant investment in other tools to help manage agile projects, we have experienced significant interest in integrating tools such as JIRA with Microsoft Project and Project Online. Integrating these tools allows organizations to preserve their existing investment in agile-specific tools, while at the same time integrating the project and resource details with Microsoft Project for enterprise portfolio reporting and resource management.

#### 1.1.7.1. Jira

Ceptah Bridge, a third-party product from Ceptah Solutions ([www.ceptah.com](http://www.ceptah.com)), provides a flexible, bi-directional integration between JIRA and Microsoft Project. JIRA and Microsoft Project integration will allow you to leverage each system for what each is good at – Microsoft Project for planning, structuring activities, scheduling and keeping everything under control – JIRA for working on tasks, collaboration, and reporting progress. Ceptah Bridge, based on its extensive set of configuration options, will synchronize data between the systems keeping both systems aligned with consistent data, so that you can focus on getting things done.



Ceptah Bridge configuration

You can start your agile projects in JIRA and then based on pre-defined integration rules move committed stories and resource assignments to Microsoft Project. From there, you can generate enterprise portfolio, program and status reports and manage the capacity of all enterprise resources in a single place independent of delivery approach.

Electronic Addendum

## 1.2. Project Home

**Addendum at a Glance – Microsoft added Project Home to help you quickly and easily access the projects and roadmaps you are interested in. In this addendum we review:**

- **Understanding Project Home**
- **Getting started**
- **Defining Favorites**

### 1.2.1. Understanding Project Home

Project Home is a user-centric landing page that will allow you to quickly access roadmaps, projects and Project Web App (PWA). Project Home allows you to quickly access the things you have worked with most recently and to create favorites to facilitate even easier access to the important items you are focused on.

Project Home is designed to be your new starting point for all your project related work, and with a single click you can quickly launch new browser windows to:

- Open a roadmap
- Open a project in PWA
- Create a new roadmap
- Create a new project
- Launch the PWA home page

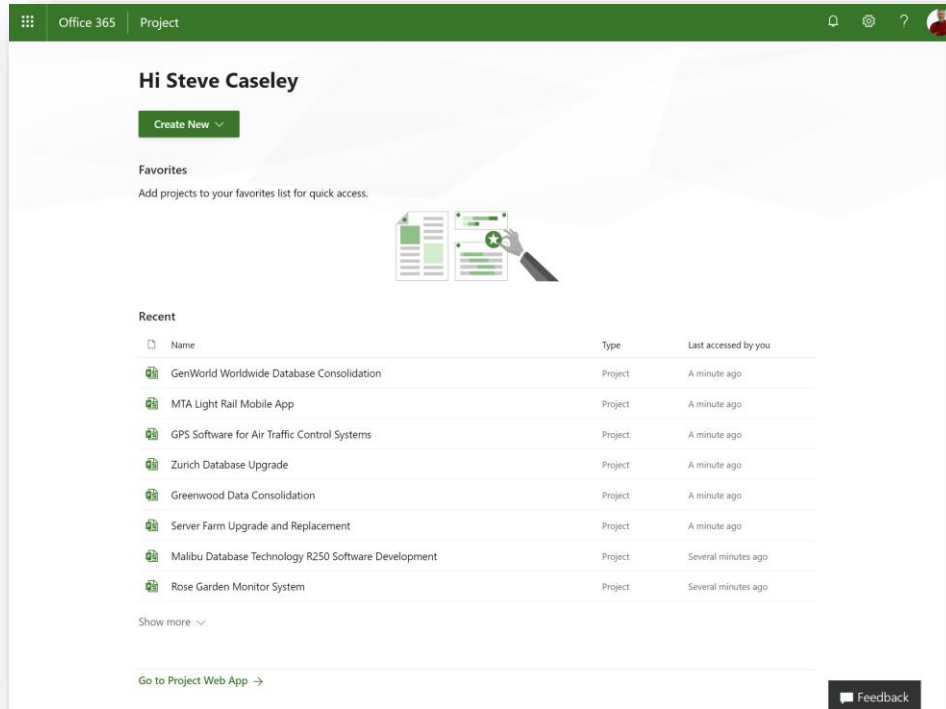
Project Home consolidates everything related to the projects in your organization and provides a configurable list of the items you are working with.

### 1.2.2. Getting Started

Project Home is launched by accessing <https://project.microsoft.com>. It can also be accessed by clicking the 'Project' icon from the Office 365 app launcher (or waffle icon) in the top left-hand section of an Office 365 page or from the home page at <https://www.office.com> by clicking the 'Project' icon.

The Project Home 'Recent' area features the last eight projects and Roadmaps that you have accessed. If the item you are looking for is lower in the list, you can click on the 'Show More' link as many times as needed to show the next eight additional recently accessed projects or roadmaps.





### Project Home

Clicking on a project or roadmap will launch a new browser window taking you directly to the last page you were working with. When you click on a project from the 'Recent' list or your 'Favorites' list, it displays the last accessed page for that project in a separate tab within your browser. In fact, all the links on the Project Home page launch in a separate tab, allowing you to keep the Project Home tab open for ease of access to other projects or roadmaps.

#### Tips & Hints:

Project Home will show all projects and roadmaps that you have accessed, even if they span different PWA instances within your tenant.

If you need to access a project that is not in your 'Recent' list, Project Home also features a 'Go to Project Web App' link at the bottom of the page. This will take you to the existing PWA Home Page for your default site.

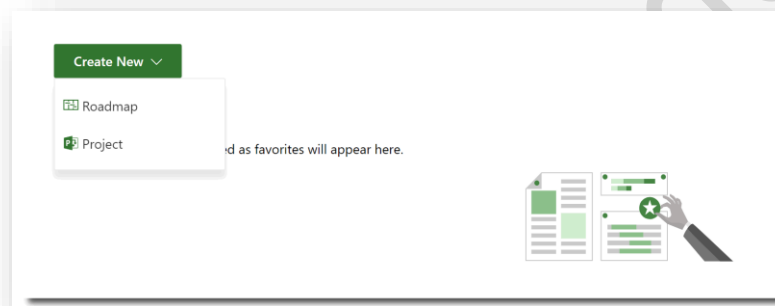
Go to Project Web App →

*Go to Project Web App link*

**Caution:**

**This link opens the default site collection at /sites/pwa. At this point, you do not have the option of changing this setting.**

Project Home also features a 'Create New' button that currently lists 'Project' and 'Roadmap' in the drop-down menu. If you click 'Project', it will open a new browser window with the 'Create a new project' page from your Project Online instance at /sites/pwa. If you click 'Roadmap', it will open a new browser window with the 'New Roadmap' page.

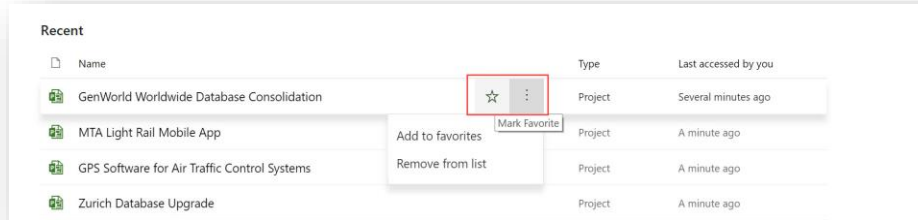


*Create New*

Microsoft is planning to incorporate other types of projects into Project Home from within the Microsoft ecosystem, such as Planner, Azure DevOps, and Dynamics Project Service Automation (PSA).

### 1.2.3. Defining Favorites

Project Home also features a 'Favorites' section that allows you to mark projects or roadmaps as favorites. To create a favorite, float your mouse pointer over the project and click the 'Star' icon, or click the ellipsis and select the 'Add to favorites' item on the menu.



#### *Add Favorite*

By default, Home will display only 8 Favorites. You can click 'Show more' if the one you wanted isn't visible. Creating more than eight will move the "oldest" one and add the new one to the top of the list.

You can remove a project from the Favorites lists by clicking the ellipsis and selecting 'Remove from favorites' item on the menu.

You can choose to remove a project from the Recent lists as well by clicking the ellipsis and choosing 'Remove from list'.

#### Tips & Hints

If you want to re-order the sequence of your favorites, you will need to remove and re-add the favorites in the reverse order you wish to have them displayed. The last favorite added is always first in the list.

## 1.3. Building and Using Roadmap

**Addendum at a Glance – Microsoft added Roadmap to tie top-down portfolio management into the existing project and program management platforms that are in use in your organization. In this addendum we review:**

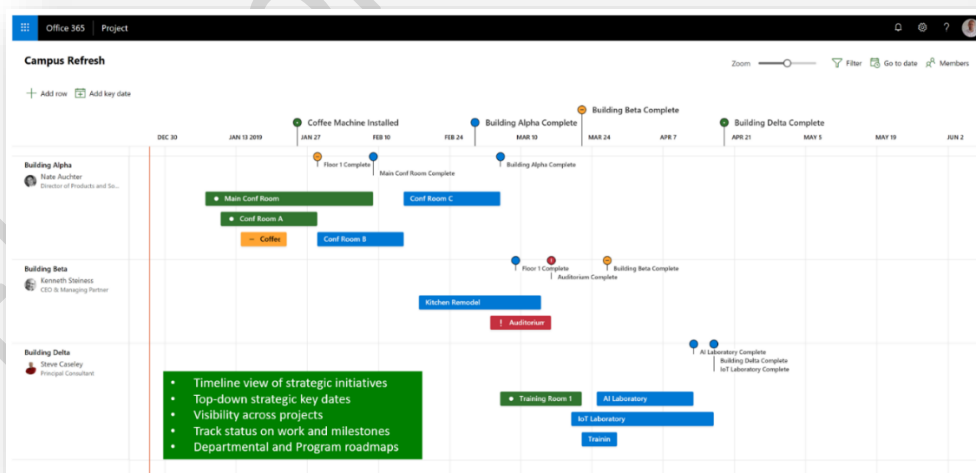
- **Understanding Roadmap**
- **Getting started**
- **Building a Roadmap**
- **Using Roadmap**

### 1.3.1. Understanding Roadmap

Roadmap allows you to create timeline views of strategic initiatives across the enterprise. You can configure the Roadmap to include targeted key dates for the overall initiative and then pull in milestones, phases, and tasks from individual projects providing appropriate details to executives with a succinct overview of how strategy is translated into execution.

Roadmaps can also be created for departments or programs and can be shared with specific audiences to ensure all stakeholders are engaged and aware of the status of the areas that interest them.

Roadmaps provides a central location for tracking project work across the enterprise and effectively communicate how business value is delivered to all project stakeholders.



Microsoft Roadmap

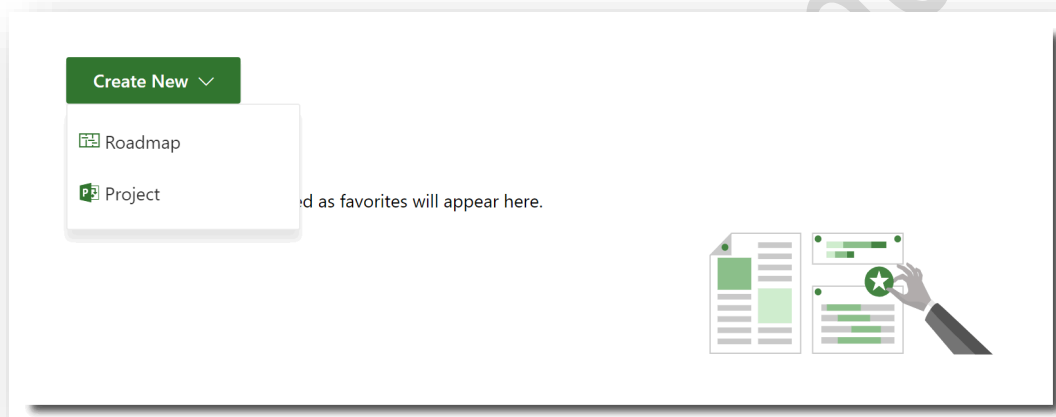
At this time, you can include work from Project Online and Azure Boards (formerly VSTS) in a Roadmap, but in future releases, Microsoft will add support for Planner and third-party services like Jira.

### 1.3.2. Getting started

You can use the Roadmap to combine vital information from multiple projects to view the status of programs and portfolios in a visual and interactive way.

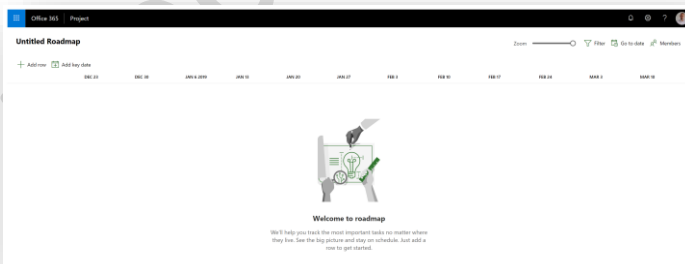
To create a new Roadmap, navigate to Project Home which can be launched by accessing <https://project.microsoft.com>. It can also be accessed by clicking the 'Project' icon from the Office 365 app launcher (or waffle icon) in the top left-hand section of an Office 365 page or from the home page at <https://www.office.com> by clicking the Project icon.

To create a new Roadmap, click the 'Create New' button and then choose 'Roadmap'.



*Creating a new Roadmap*

When a new Roadmap is created, a blank canvas is presented. The canvas layout is clean and intuitive, representing the modern concept that Microsoft is introducing.



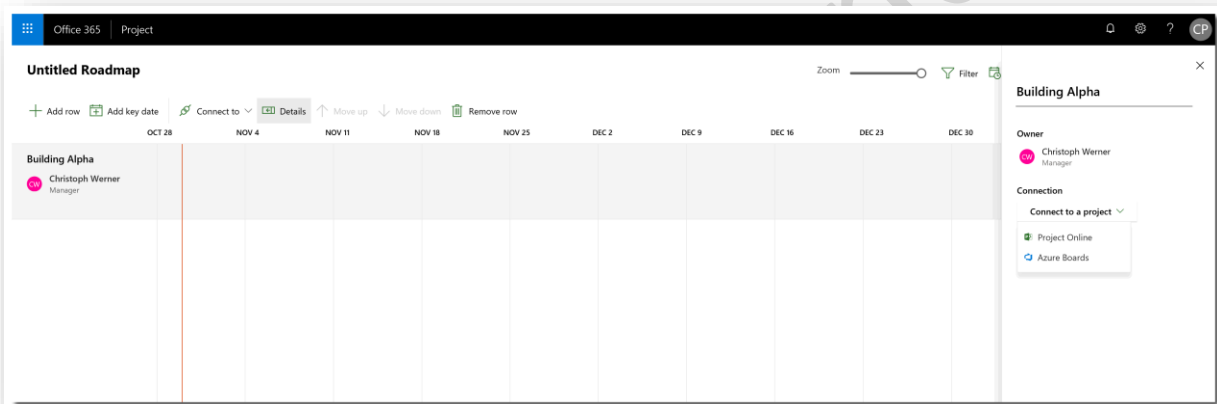
*New Roadmap*

Although you do not need to name the Roadmap, we recommend always giving each one a meaningful name so that it can be shared with the stakeholders.

### 1.3.3. Building a Roadmap

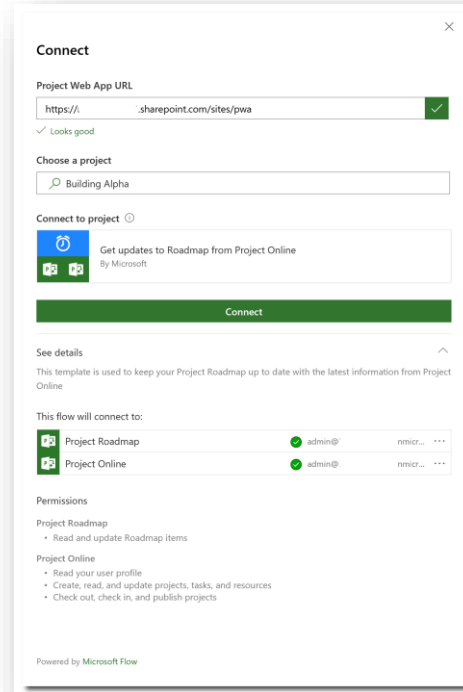
The Roadmap now needs to be defined to display all the items of interest to the stakeholders. A Roadmap is composed of rows which host items that can be connected to either Project Online or Azure Boards.

Click on '+ Add row' to add details to your Roadmap. With the new row added, in the right-hand pane, give the row a descriptive title that will be meaningful to anyone who views the Roadmap. Also, you must specify an owner, in other words the person you would contact to get more details, and then the data source for the row, either Project Online or Azure Boards.



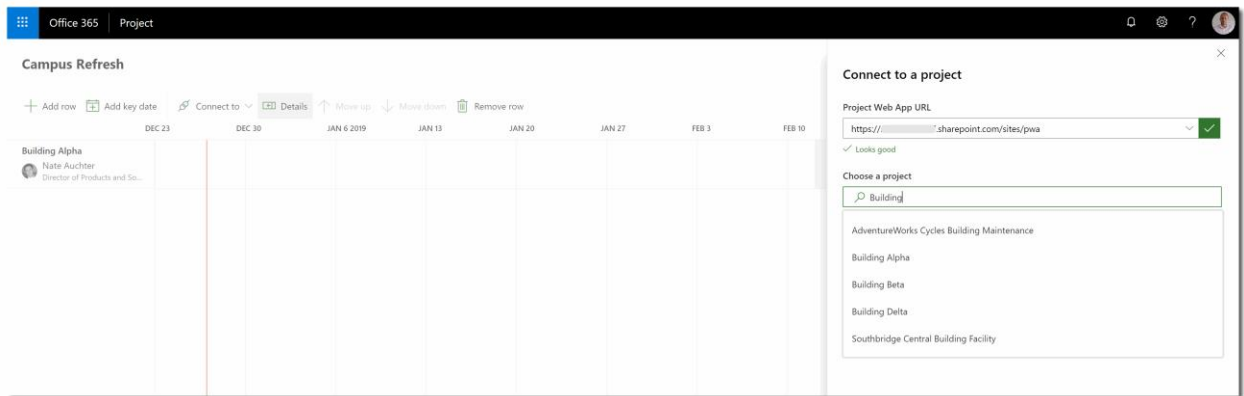
*Adding a row to the Roadmap*

Roadmap uses [Microsoft Flow](#) to keep the data current as changes are made in the connected project schedule(s). When connecting to Project Online (Azure Board connections are discussed later), you first specify the Project Web App URL to configure the 'Flow' connection.



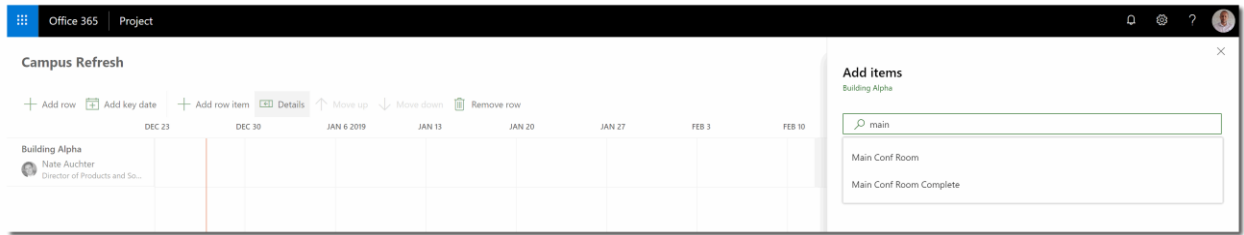
Connection details

Next, you use the text search to select the project from Project Online. In this first example, we will be connecting to a project called 'Building Alpha'.



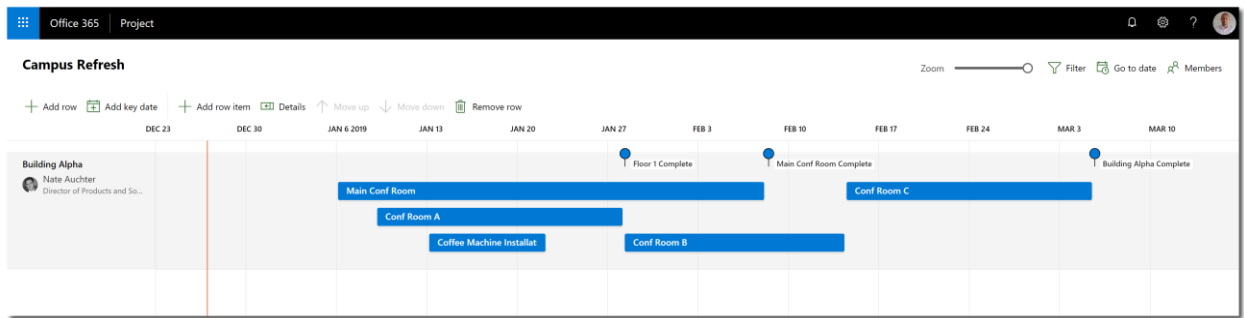
Choosing a project

Once connected, you can populate the row with summary tasks, milestones or tasks from the project schedule. From the 'Row items' pane on the right, you can search for any schedule item that you want to include on the Roadmap.



*Adding items from the project schedule on the row*

Once you have defined all the items to be included on the row, close the dialog and validate that the row displays the appropriate information.

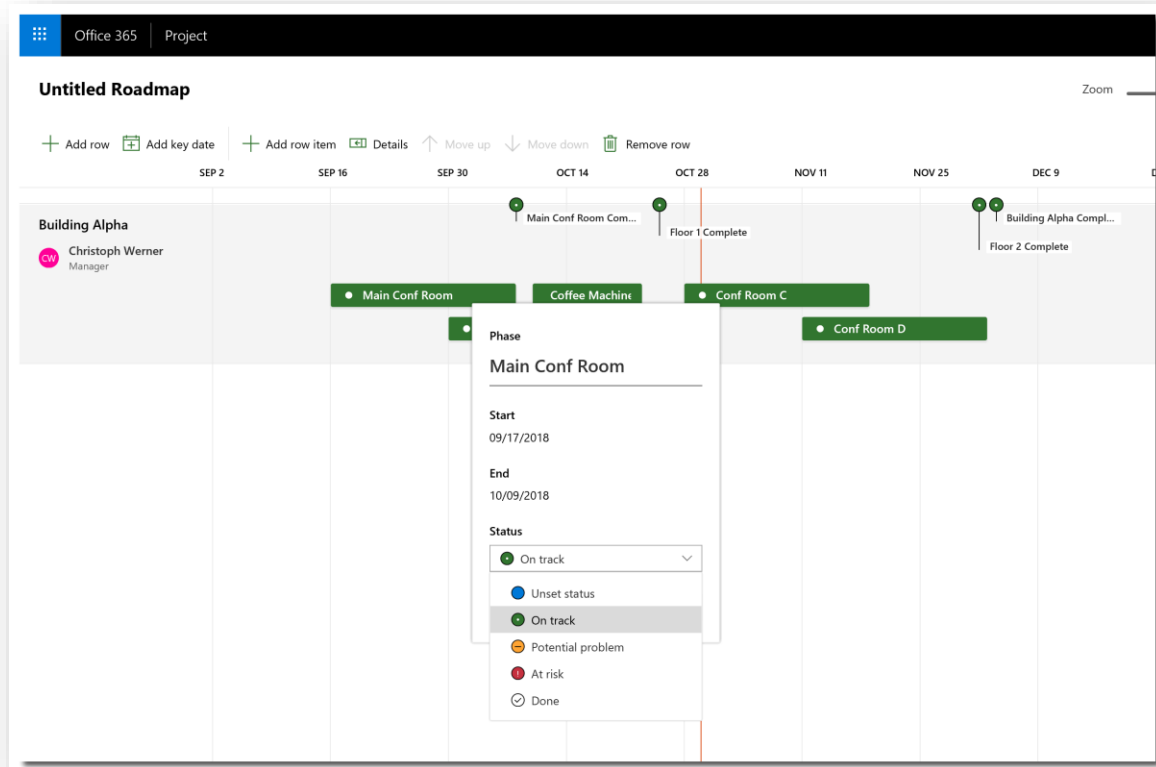


*Tasks and milestones added to the row*

#### 1.3.3.1. Setting the task status

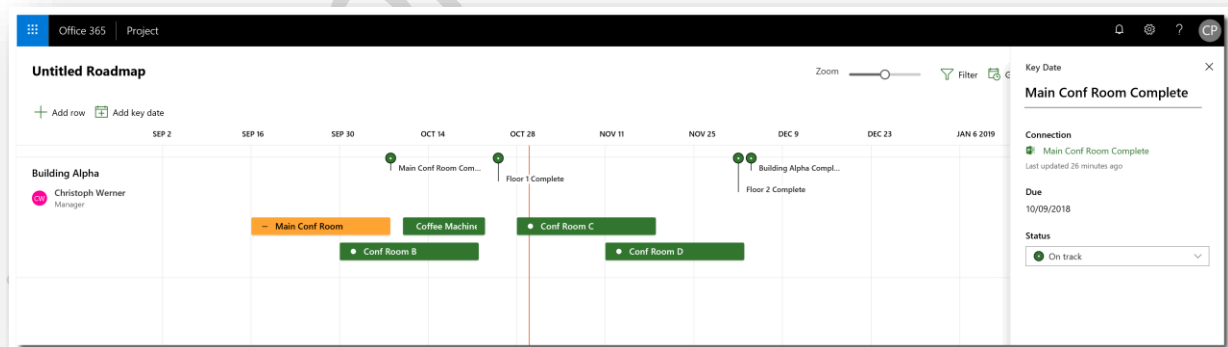
The Roadmap allows you to set the status of any item displayed. To do this, click on a task and choose one of the available options to define the current status of the task.





*Setting the task status*

Setting the status changes the color of the item on the Roadmap.



*Task details*

## Caution

The status on the Roadmap does not have a direct relationship with the task status in the project schedule. Rather, you have the opportunity to set the status manually in the Roadmap. You can always check the status in Project Online by navigating back to the project schedule from the connection link.

### 1.3.3.2. Adding details from Project Web App

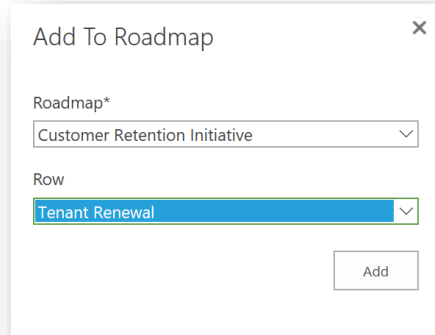
Once you have a project row defined in Roadmap, you can directly add schedule components to it directly in PWA. Open the appropriate project open in PWA and ensure that the Schedule PDP is displayed. Select the appropriate tasks from the view and then click 'Add to Roadmap' from the 'Task ribbon > Tasks section'.

The screenshot displays the Microsoft Project 2016 interface. The 'Office 365 Project' ribbon is active, with the 'TASK' tab selected. The 'Add to Roadmap' button is highlighted with a red box. The main area shows a Gantt chart for 'AA Tenant Renewal R200' with a task 'Draft Preliminary Infrastructure Design Documents' highlighted in yellow. Below the Gantt chart is a task list table with columns for ID, Mode, Task Name, Duration, Start, and Finis. The task 'Draft Preliminary Infrastructure Design Documents' (ID 38) is highlighted in green in the table.

ID	Mode	Task Name	Duration	Start	Finis
25		Define system requirements	6d	8/16/2018	8/24/2018
26		Define target performance metrics	0d	8/24/2018	8/31/2018
27		Review Current Market Solution Vendors	53.04d	8/31/2018	11/11/2018
28		Hardware vendors	2.14d	8/31/2018	9/5/2018
29		Software vendors	2.14d	9/5/2018	10/26/2018
30		Communications vendors	3d	10/26/2018	10/31/2018
31		Evaluate Data Center sites	4.29d	10/31/2018	11/6/2018
32		Design partners	2.86d	11/6/2018	11/9/2018
33		Implementation partners	2.86d	11/9/2018	11/14/2018
34		Review current market solution vendors complete	1.43d	11/14/2018	11/15/2018
35		Analysis Complete	0d	11/15/2018	11/15/2018
36		Design	198.89d	11/15/2018	8/28/2019
37		Secure necessary architectural resources	2.86d	11/15/2018	11/20/2018
38		Draft Preliminary Infrastructure Design Documents	109.46d	11/20/2018	4/25/2019
39		Preliminary hardware design	11.43d	11/20/2018	12/6/2018
40		Preliminary software design	5.71d	12/6/2018	12/14/2018
41		Preliminary communications design	5.71d	12/14/2018	12/24/2018
42		Preliminary connectivity LAN/WAN design	7.14d	12/24/2018	1/4/2019
43		Unplanned Design Investigation and Analysis	35.71d	1/4/2019	2/25/2019

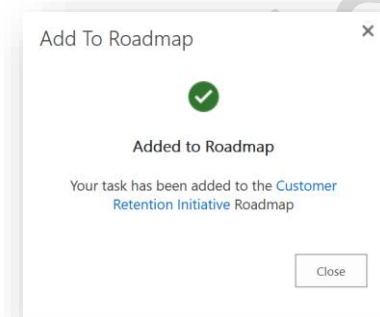
Adding schedule components to Roadmap from PWA

On the 'Add to Roadmap' dialog select the Roadmap and Row that the selected tasks will be added to.



*Add to Roadmap dialog*

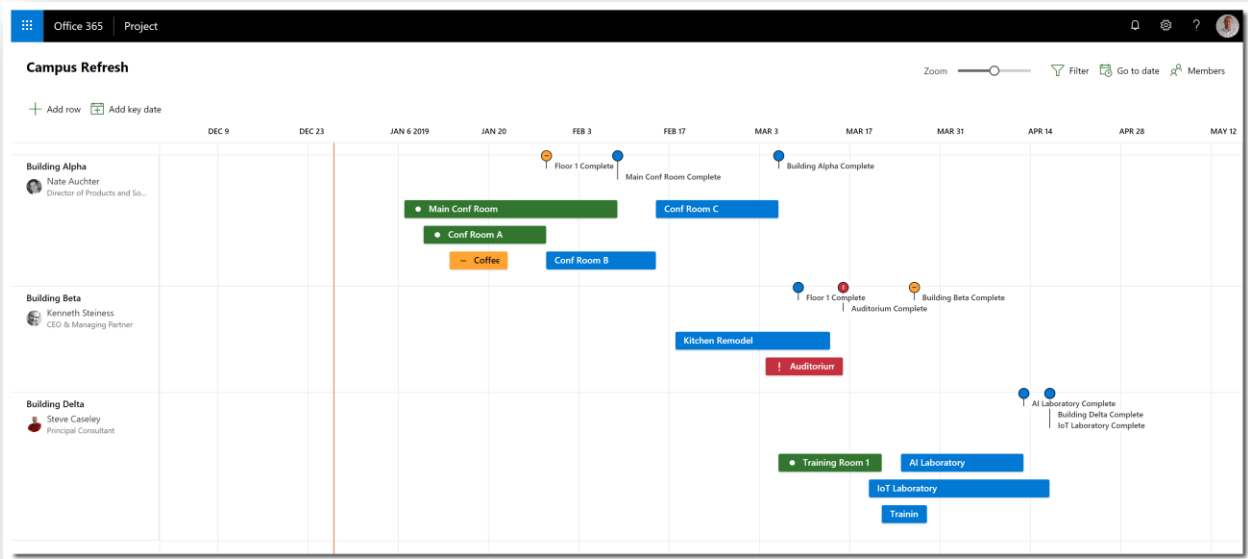
We find this functionality specifically useful as it will allow you to add the 'Project Summary' task to a roadmap. Click 'Add' and return to the Roadmap to view the updated roadmap and set the new items status as required.



*Add confirmation dialog*

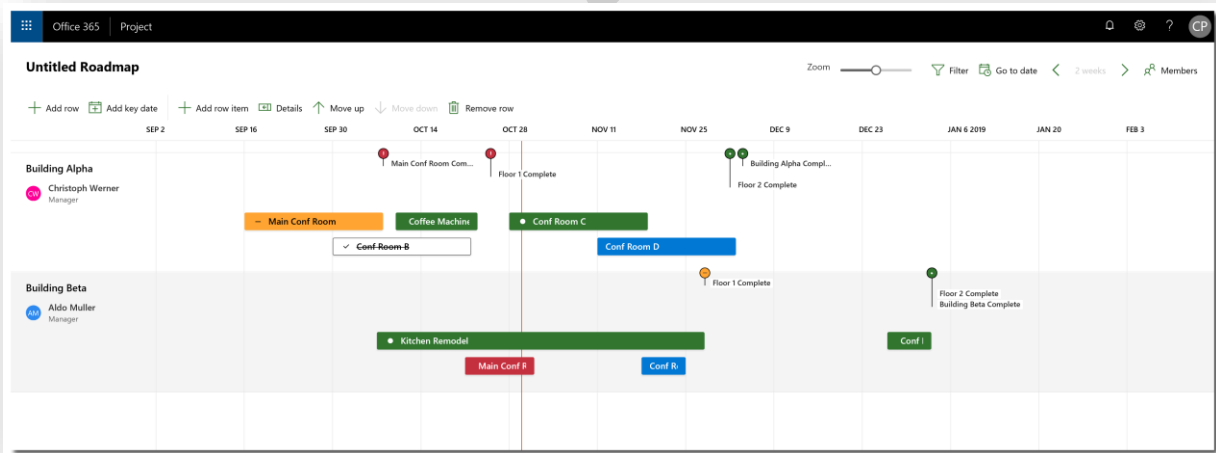
#### 1.3.3.3. Adding new rows

As a Roadmap is intended to represent a program, portfolio or departmental view, you will need to create additional rows to add more projects to your Roadmap. Each new row can represent a collection of important tasks from a different project that is also of interest to the stakeholders. Follow the steps described above to configure each new row.



*New rows added to the Roadmap*

You can use the 'Move up' or 'Move down' buttons to organize the layout of your Roadmap.

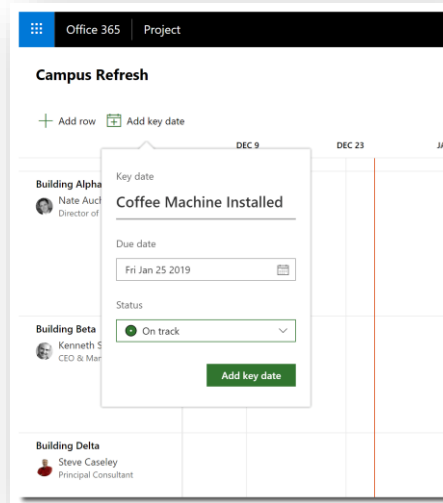


*Repositioning the rows in the Roadmap*

#### 1.3.3.4. Key dates

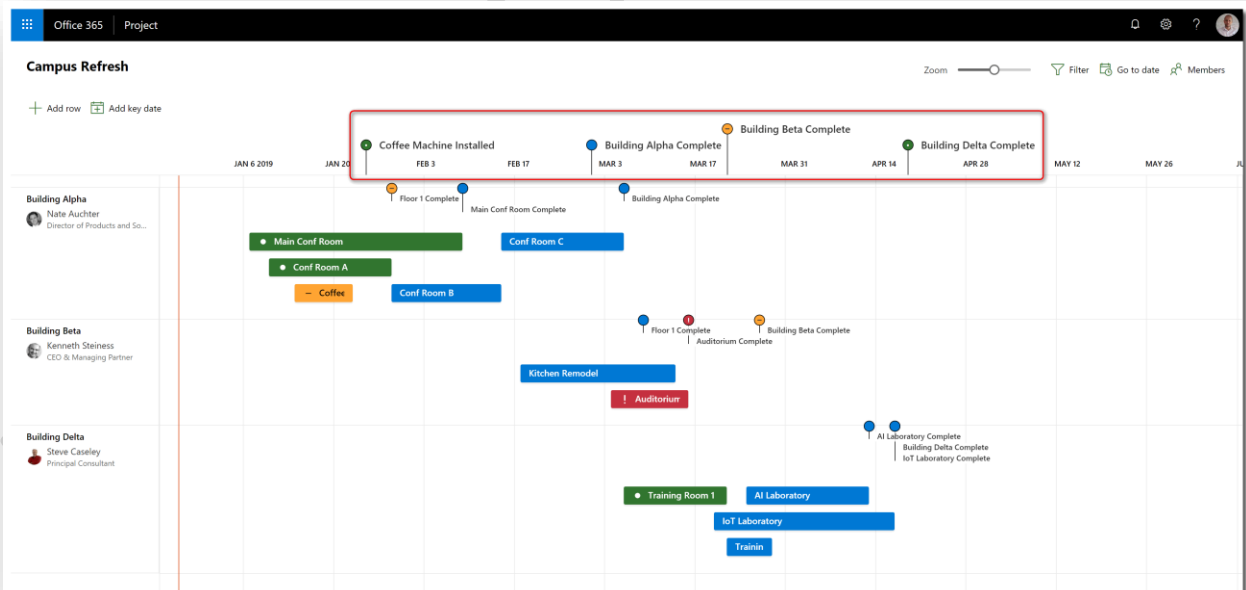
In addition, you also can add 'Key Dates' to the Roadmap. Think of 'Key Dates' as organizational milestones that should be watched for the entire Roadmap and are typically not linked to a specific item in the project schedules. Stakeholders can then easily compare the milestones from connected projects to the 'Key Dates' that have been added at the Roadmap/Program level.

You can add 'Key Dates' to your Roadmap by clicking in the 'Add key date' button and providing the Name, Due Date and Status.



*Adding Key dates to the Roadmap*

Once added, Key dates will be displayed at the top of the Roadmap, in the Timeline area:

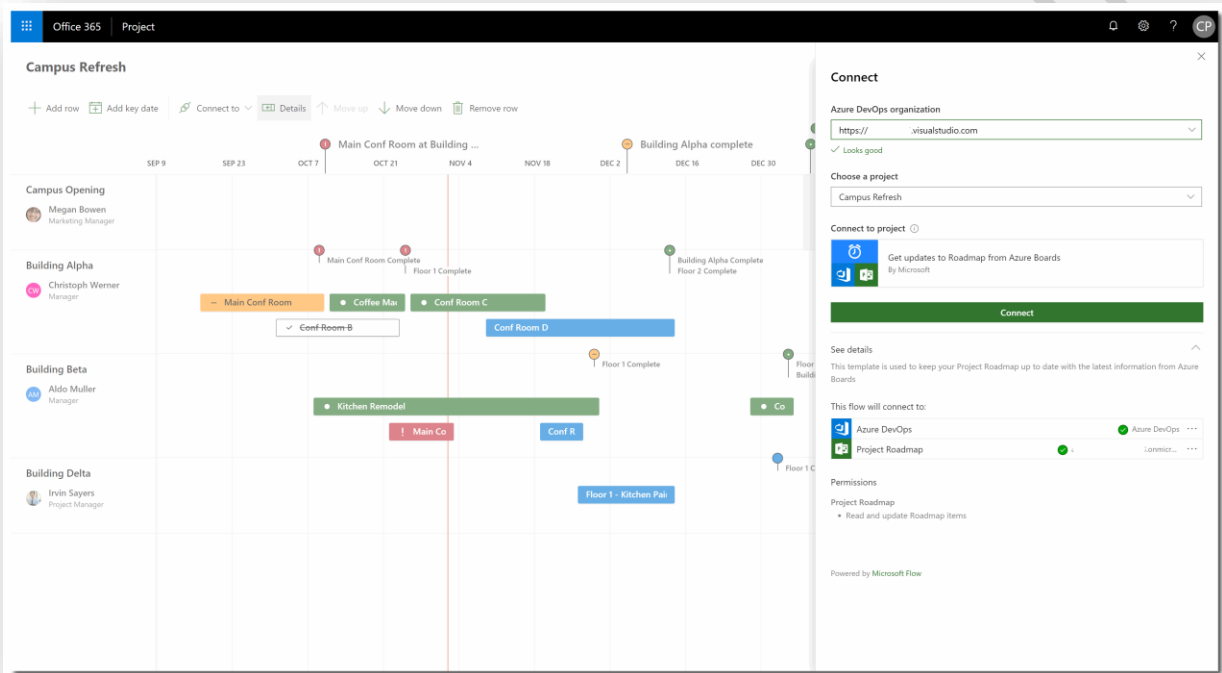


*Key dates added to the Roadmap*

### 1.3.4. Connecting to Azure Boards

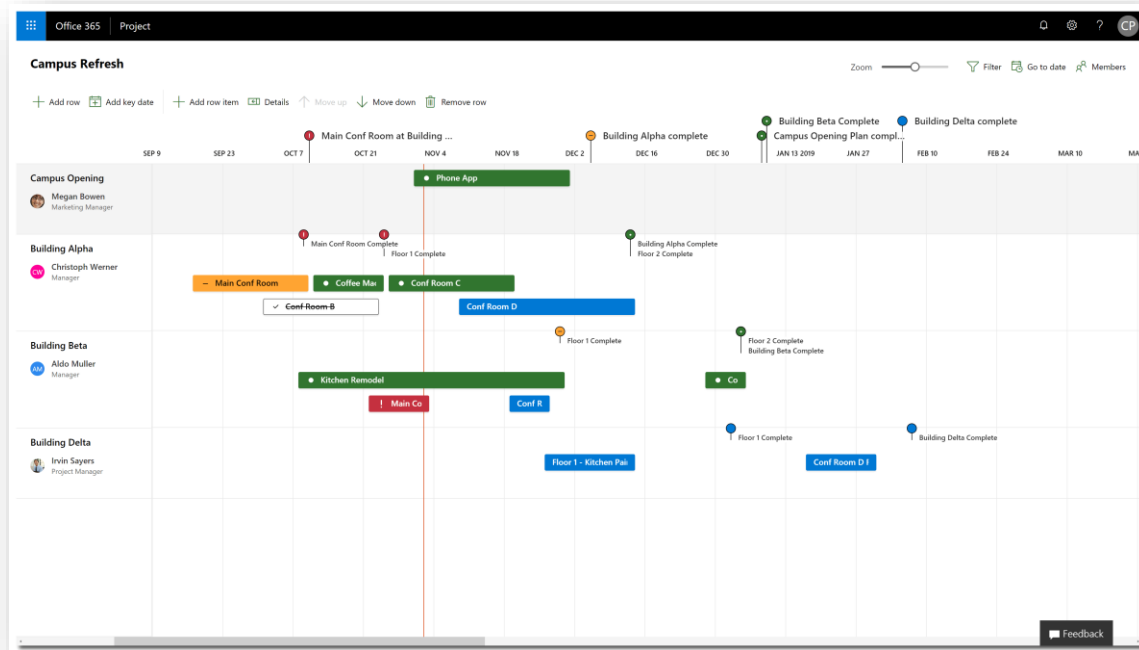
Roadmaps have been designed to display projects from multiple platforms allowing your organization to pick the optimal method when managing projects, tasks, and work (Project Online or Azure Boards) while allowing you to integrate the details into a common roadmap.

As was previously done when connecting with Project Online, start by inserting a new row into your roadmap, this time using Azure Boards in the connection area. Provide the Azure DevOps URL and confirm the 'Flow' connection to the tenant.



Connecting to Azure Boards

After the connection is configured, you will be able to add the work items from Azure Boards that are relevant to the program. As with Project Online, first you choose the appropriate project and then select the details to be shown on the Roadmap.



*New row with items from Azure Boards*

### 1.3.5. Using Roadmap

You have the ability to adjust the display to help you focus on what's relevant to you based on a specific information requirement:

- **Zoom:** By using Zoom you can increase or decrease the time period displayed to accommodate the items that are relevant to you.
- **Filter:** You can also apply filters to show only the items for a specific row owner.
- **Go to date:** If your Roadmap has multiple items that span across a wide period, you can easily focus on a period that is important to you.
- **Navigation:** You can also use the horizontal scroll to quickly move to past or future periods.

### 1.3.6. Sharing a Roadmap

As a Roadmap owner, I can share my Roadmaps with other people in the organization. I use the 'Members' area on the toolbar to invite my stakeholders to view the roadmap. I can either share with an existing group that I own or create a new group from scratch. I can let everyone know they can view the roadmap.