REVIEW: ManagementStudio

Part III - Exploring the 4C's Methodology for Delivering Projects - CONTROL

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The Second 'C' is for CONTROL

Welcome to the third article in this series of ManagementStudio reviews of the 4C's methodology where I am going to take you through the second of the 4C's. CONTROL. I'll make no apologies for this review being the longest to date, but even now I could have written far more. Even a book maybe! But that just goes to show the extent of the features and capabilities that ManagementStudio has to offer.

In keeping with the book analogy from the first two articles, having now met the characters in the story, understood their backgrounds, and of course we already know what the plot is going to be (the project outcome), we can start to piece together what our characters (users), are doing, their background, how they are doing it (where, what, and when), we can now start to tell the story.

I guess you could also compare this with doing a jigsaw puzzle. In the previous phase, the capture phase, we collected all the pieces so now all we need to do is put them together to build the complete picture.

So, lets tell the example story of how John Doe migrated his PC from Windows 10 to Windows 11 while working from home. Not the catchiest of titles, but I'm sure you know where I am going with this example. And of course, ManagementStudio can tell far more stories than that. In fact, there are lots of different titles or projects ManagementStudio can help deliver.

Start at the beginning

I know that might sound like an obvious statement, but I want to just start by looking at what exactly ManagementStudio has captured before we start putting the information and data to work in delivering the project.

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ManagementStudio Review

The 4C's Methodology: **CONTROL**
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It also serves as a checkpoint to make sure you actually have usable data and the connectors are doing their job of capturing data and information.

To do this I'm going to highlight some of the reporting features starting with the very first screen you will see when you first log in to the ManagementStudio Client and the dashboards.

An example dashboard screen is shown below for a project that is already inflight (top left):

I've also included a couple of other screenshots I took from the demo platform just to highlight some of the data we have at our disposal.

Bottom right is the status of applications within the project. It gives you a quick snapshot of where you are at in the project. Perfect for showing stakeholders the state of play in real-time.

This screenshot also shows something called blueprints that I will come back to later in this review, as they provide another really useful feature.

I've also shown (top right) a view of all the applications that have been identified. You can see that these are all in the "discovery" phase ready for you to work out what the next steps are. Similarly, there are dashboard views for user migrations and devices too.

Finally (bottom left) is the dashboard designer that allows you to create your own custom dashboards to show exactly the information you need.

The team at ManagementStudio have informed that the next release of the solution will allow these dashboards to be accessed from a web browser, which will extend their usefulness even further and adding to one of the other of the 4C's, and that is collaboration.

So now we know we have real information and data and from the example screenshots, you can see that ManagementStudio gives you a comprehensive high-level overview of your project or projects. In this case, an example of an already up and running project.

One important point I would just like to highlight is that you can have multiple projects running simultaneously, all sharing the same data, but displaying it in different ways depending on the structure of the project. It's just a click of an icon to jump between different projects. Not only that, different project managers can have different access levels to different projects. Maybe I have full access to my project, but read only access to another, or just one component of that project. I'll talk a bit more about that later.

Armed with all this newfound information, it is time to put it to work in delivering the project.

Exploring your environment with Data Mining

There is no point to collecting all this valuable information if you can't use it. Luckily, I found the ManagementStudio datamining report feature invaluable in presenting just the right information you need without spending hours having to sift through it manually.

Before I start exposing screen shots of data, even though from a demo platform, I should, as you would with a fiction book, state that the story, all names, characters, and projects portrayed in this article are fictitious. No identification with actual persons (living or deceased), places, buildings, and products are intended or should be inferred. So, now with the disclaimer out of the way, we can move on and start to look closely at how to make the data work for you.

ManagementStudio has a few different ways in which you can manipulate data to show you the reports and exactly what you need in answering questions about your environment.

The first I'm going to look at is the integrated datamining reporting functionality within the ManagementStudio client, an example of which is in the screenshots:

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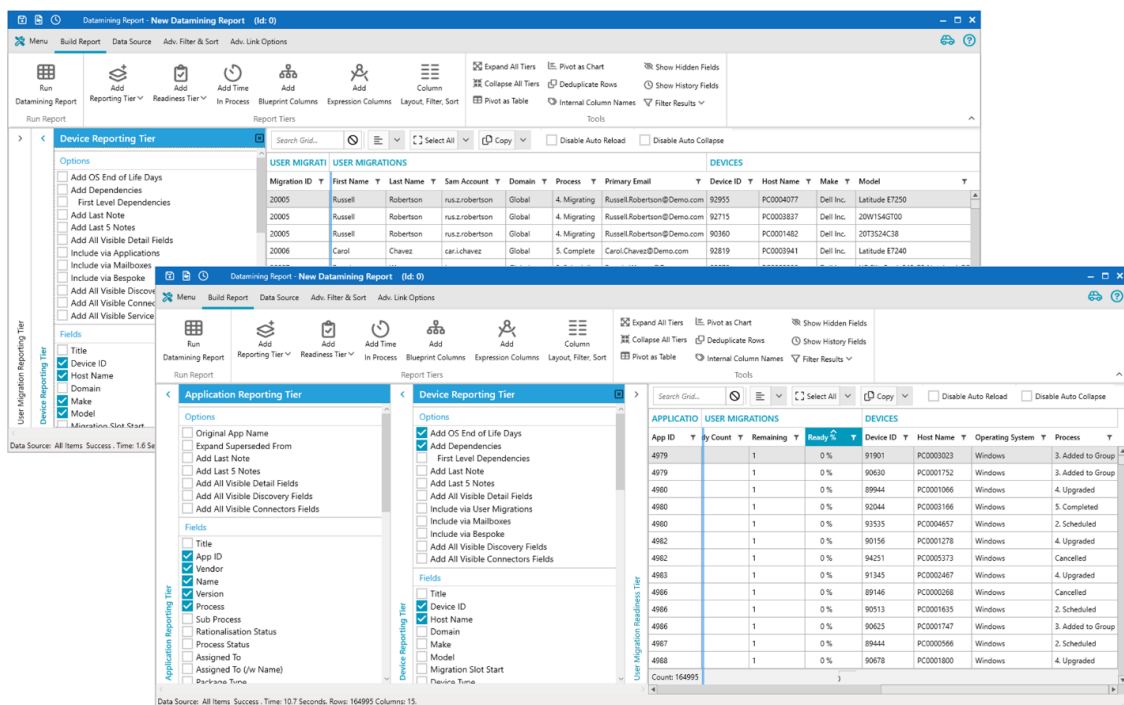
Creating and generating reports is easy to achieve yet helps create a very powerful story.

You simply select the reporting tiers, by clicking the dropdown button for reporting tier or readiness tier.

For example, clicking **Applications** under **Add Reporting Tier** will allow you to configure what aspects of that tier, in this case applications, that you want to report on such as App ID, vendor, version etc.
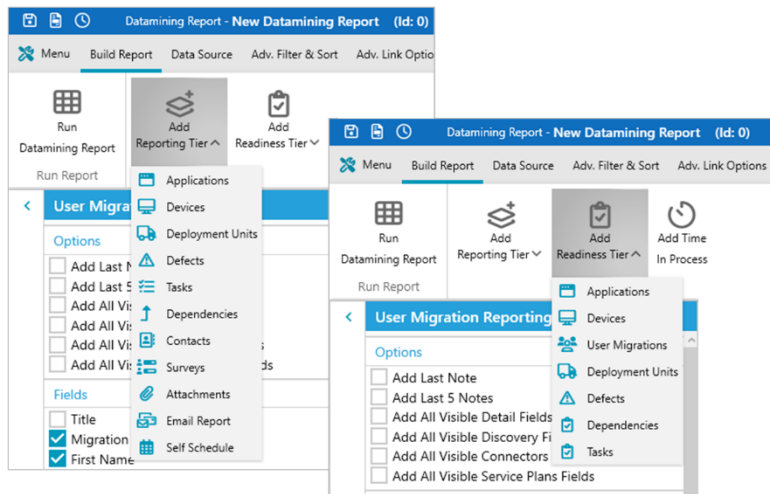
The same process works for adding a **Readiness Tier**. Again, select the subject of the report, applications, devices etc., and then configuring the information you want to include in the report.

Once configured, just click the **Run Datamining Report** button and, hey presto, you will see something like the example above.

Not only are these reports designed to present the captured data, but also to help you quickly answer questions relating to the project. Perfect for when stakeholders want to know where the project is at.
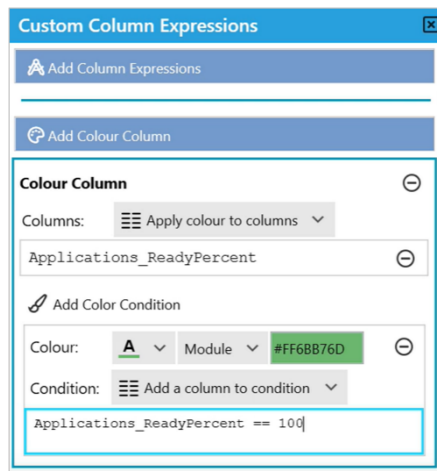
For example, you could configure the reports to tell you which of your users are ready to be migrated, i.e. are listed at 100%. You would do this ready by adding what ManagementStudio calls an **Expression Column**, which you can even configure the font colours to highlight the data. Then you could filter even further by adding the device and maybe even an application.

So, the report could be something like, show me which users with a Dell Latitude 7490, in the Bristol office, running Adobe Acrobat, are ready for migration.

Another cool feature is the ability to pivot the results into either a table or a chart with the ability to completely customise them in order to present the data how you want it to be presented.

Before we move on to cover the other datamining options, we have a quick guest appearance from one of the other 4C's. Say a quick hello to Collaborate.

As I mentioned previously, maybe one of the project stakeholders had asked a question about the project status or had a more specific question about who is running what, from what location, and when that user is likely to be migrated.

Maybe they want a progress report on what percentage of users in a particular location have already been migrated and who is left to migrate.

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Either way, ManagementStudio allows you to share a link to the report you just created to answer their questions.

In my experience this is a very useful feature because if you let them try and run a report themselves, they might not configure it correctly and, as a result, might come up with different answers to your answers.
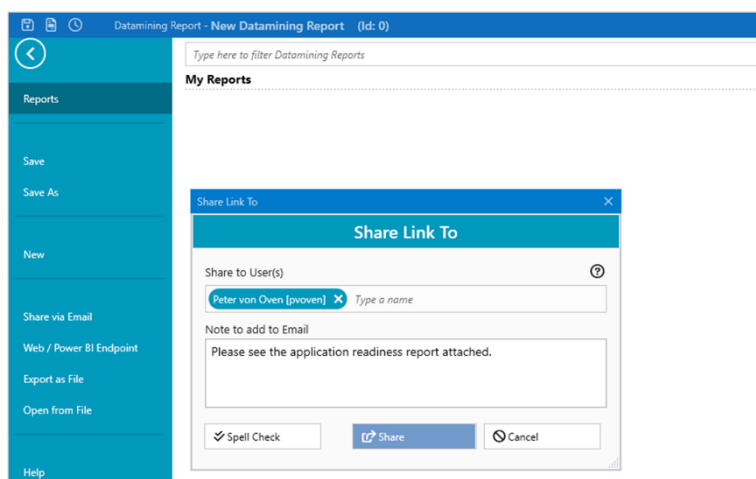
You will also see in the screenshot an entry for **Web / Power BI Endpoint,** which is a nice segway into those last couple of datamining options I spoke of earlier.

If we take the first of these, **Web**, this feature allows you to publish, to authenticated or anonymous users, a URL from which they can access the report.

Secondly, there is the **Power BI** option. Power BI, for those unfamiliar with the product, is a Microsoft business analytics tools that used to analyse data and share insights in the form of reports and dashboards. ManagementStudio datamining reports can be published as a Power BI Endpoint that allows Power BI to connect to and, as with the web feature users, connect either as authenticated user or anonymous users.

If I was presenting the datamining feature on a Teams call (other platforms are available) then I can almost hear the next burning question coming before somebody even asks it. What's that question? That question is "Is there an API?"

And the answer is …. Yes of course there is!

As the whole datamining and reporting feature is so critical to running a project and the core component to everything ManagementStudio can do, then having an API is key too. I'm not going to go through the entire API stack and the different API calls now but, suffice to say, it is very comprehensive. It also provides the backbone to the ManagementStudio automation engine that I will discuss later.

Organising your data logically

You will have seen, as did I, the amount of data that has been captured is somewhat comprehensive to say the very least, but maybe also not quite complete in the sense that it doesn't reflect your project.

Luckily, ManagementStudio can restore order in the form of a feature called **Blueprints** that allows you to create folder structures. Think Active Directory OU's or Window folders.

You can create and customise blueprints to reflect your environment by creating folders that maybe reflect geographical office locations, or maybe on a departmental basis. Maybe it's divided into desktop PC's and laptops. However you carve out the structure that works for you and your project, you

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can then add the data into those blueprint folders. That data may be users, applications, devices, and so on. I've added a screenshot below as an example:
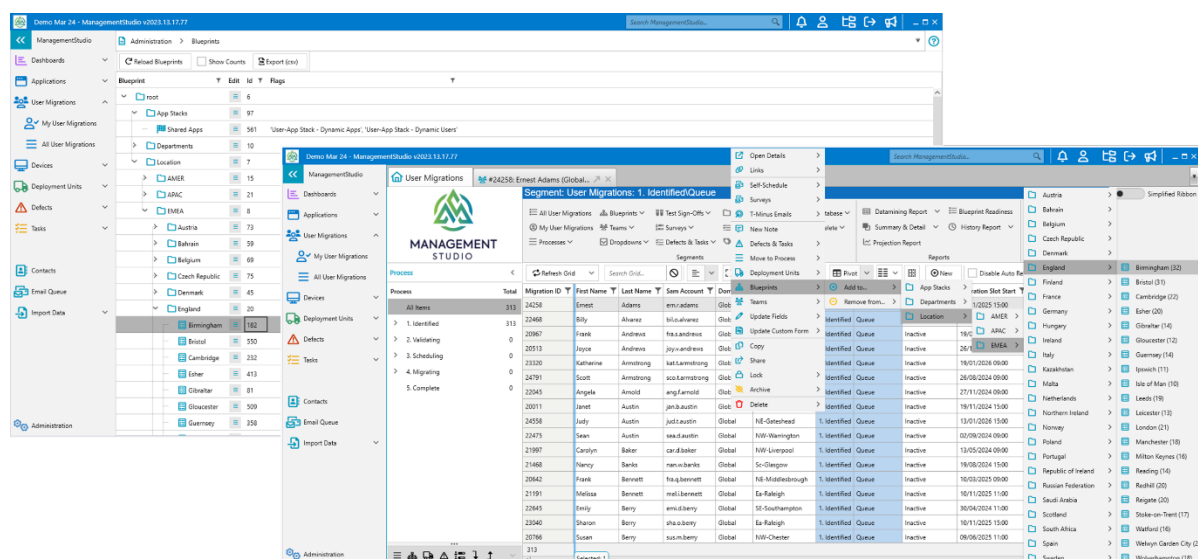
A neat feature is that you can add the same data to multiple blueprints. For example, if you were using Microsoft Word, a common application in most organisations, then you could add Word to more than one blueprint. That blueprint reflecting a department, location, or user. It is entirely up to you how you organise your data.

As my example screenshot above shows, the demo platform has a location-based blueprint. Then to add applications and users to the blueprint, i.e. add them to that folder, it is just a case of right clicking on the target and navigating to the blueprint you want to add them to. I'm told that most customers use the data connectors to build blueprints, typically using Active Directory attributes like Office and Department. This means the blueprint creation and maintenance is fully automated.

Organising your data in this way enables ManagementStudio to target specific blueprints. For example, if you have a London migration coming up you can email just those in that blueprint. There is no point emailing those in a different location with irrelevant information. That will likely mean they switch off from future communications that may affect them. Great for the overall user experience.

Then of course there is the role-based access elements to consider which, by creating these blueprints, you can enable those directly involved in managing the project to have access to just the data they need. Maybe on a location basis, or on a departmental basis.

Structuring your project with Workflows

ManagementStudio is all about managing your projects and so it should come as no surprise that one of the core features are workflows. Workflows also provide the project lifecycle management and structure that you need as you work through the various steps to achieve the desired project outcome.

Each of the categories has it's own unique workflow, based on the individual requirements of that category and the different tasks required to successfully complete the project. In terms of categories, I'm talking about users, applications, and devices as we have discussed previously. For example, in the applications workflow you have things like packaging, QA, and UAT. All things that relate to an

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applications journey through the project. I've taken a screenshot to highlight both the modules and the steps within each one to demonstrate what I mean.

The other reason for the screenshot was because I wanted to also show you a couple of other modules that I found really useful that haven't been previously mentioned, but equally add to the comprehensive list of ways to manage elements of a project.

The first is **Deployment Units**. This simply allows you to group users (or other items like devices) together that ensure the users within the deployment unit to be migrated as a single entity. For example, you could create a deployment unit based on location so that you can easily schedule and catch everyone in the same place when it comes to deployment. Maybe you do it by department so as to cause as little disruption as possible. Communication is also key here as you can communicate relevant information to your deployment unit members rather than just send out blanket emails to everyone.

The other module I wanted to highlight is **Defects**. These are very useful for recording things that might not go to plan and, for anyone who has ever been involved in a project, this can happen a lot. As with the other processes and workflows, ManagementStudio can be used to track these issues from initial reporting through to resolution, but, not only that, this is integrated into the whole project process.

This means that the workflow cannot continue to a successful close until the issue has been resolved. Maybe it is something the IT admins need to address, or maybe a support issue for a vendor. You can also add dependencies too. Either way, you can also assign defect events to an owner, meaning there is accountability and defects and issues are addressed.

Just to expand on the defects module for a moment, I'd also like to introduce you to another feature that enables ManagementStudio to help the project team deliver all aspects of the project, and that's the **Tasks** feature.

As the name suggests, tasks allow you to create tasks, and assign tasks to particular members of the projects team. As we were just discussing defects then maybe a key task would be to resolve that defect to enable the project to move forward.
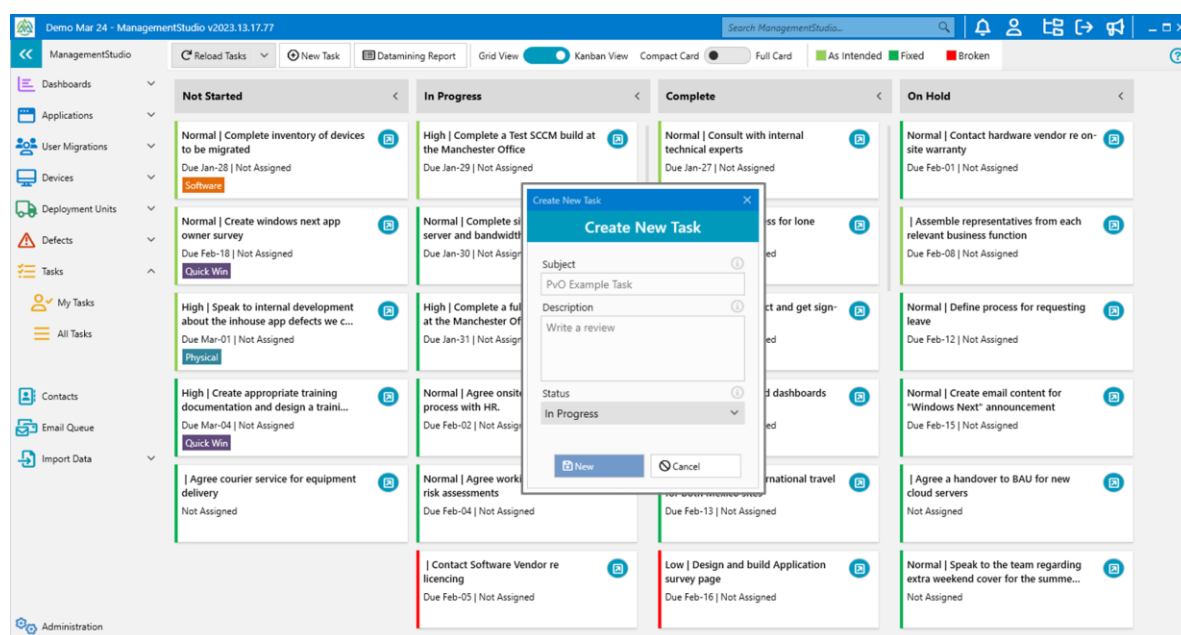
Tasks can also have a relationship with another of the 4C's and thats collaborate. You could have third parties working towards resolving and working through some of the tasks.

We've looked at some of the processes in the different modules and how you move through the processes, but my next question is "is this all manual or is there an element of automation that can be applied?"

Automating the Process Progression Steps

There may be times when manual workflow management is required, as you want to physically check things have been completed before moving on, but then there may be times when there is no need for manual intervention and the process can move automatically to the next step. This is where I can see how ManagementStudio saves time and enables you to deliver projects much quicker.

There are three types of automation that can be configured:

- Triggered Events: this runs when the configured trigger is activated. For example, an end user completes a survey or a form requesting additional information, and they submit the answers.

That user is then automatically moved to the next process step where you can see they are now ready for the next step.

- Conditional Events: this runs when a condition is met. For example, once an end user's applications reach 100% ready then they are automatically receiving an invite to choose their migration time and date slot.
- Scheduled events are performed at a specified point and are designed to help with routine activities. For example, sending surveys to end users after a particular project phase has been completed.

But there is more to the automation process than just sending emails and moving users through the project lifecycle phases as shown in the example below with a Windows 10 migration project.
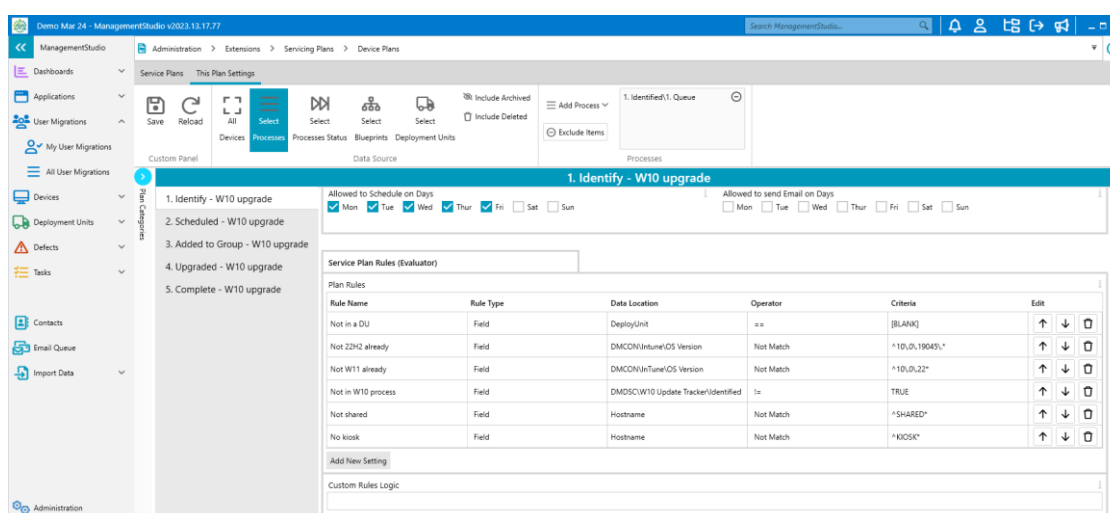
One cool feature I'll use as an example is that if an end user completes a survey in which they update their contact information or office location, this can be updated in your directory service using a combination of the ManagementStudio API and PowerShell scripts. You could even go as far as updating devices in Intune or integrating into a support platform and raise a ticket in something like ServiceNow to maybe mirror a defect that has been logged in ManagementStudio.

Whatever you need to automate to make the process easier, ManagementStudio provides a comprehensive and flexible platform to create the automated workflows you need to successfully complete your project.

Summary

In this third review I have given you an overview of the second 'C' of the 4C's methodology, and that is Control. Probably one of the most important of the C's, although you could argue that they are all as important as each other, but Control in this instance enables you to really get to the heart of your project and actually start to deliver the desired outcome.

Again, I have barely scratched the surface of what is possible with ManagementStudio when it comes to working with the data and putting it to work in taking you through the story of your project, chapter by chapter.

The other interesting thing I have noticed, the more I work with ManagementStudio, is that although I'm looking at each of the 4C's individually, they are in reality all tightly integrated with each other, with the

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sole purpose of assisting you in delivering your project. You can see this, as each one seems to pop up in a cameo role throughout the review.

I've said this before too, and that is that ManagementStudio is more than a point project solution. With data continually and automatically being updated, it will proactively help you in identifying your next migration project which, by having the data already at your disposal, you have already started it without even knowing.

Whats Next?

In the next article I am going to take you penultimate C of the 4 C's with COMMUNICATION and explore the features and capabilities of ManagementStudio and how you can ensure that everyone involved in the project is involved and engaged.

In the meantime, if you want to see ManagementStudio in action, then head over the web site for a demo- https://managementstudio.com/demo/

About the Author

Peter von Oven is an experienced technical consultant working closely with customers, partners, and vendors in designing technology solutions, to meet business needs and deliver outcomes. During his career, Peter has presented at key IT events such as VMworld, IP EXPO, and various VMUGs and CCUG events across the UK.

He has also worked in senior presales roles and presales management roles for Fujitsu, HP, Citrix, and VMware, and has been awarded VMware vExpert for the last ten years in a row including vExpert EUC, vExpert Pro, and now the new and as yet unnamed Omnissa EUC Expert community.

Today he works with partners and vendors helping drive and deliver innovative technology solutions. He is also an avid author, having now written 18 books and created numerous videos on the subject of VMware end-user computing solutions.

In his spare time, Peter volunteers as a STEM Ambassador, working with schools and colleges, helping the next generation develop the skills and confidence in building careers in technology. He is also a serving Royal Air Force Reservist currently working as an instructor with the Air Cadet organisation.

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