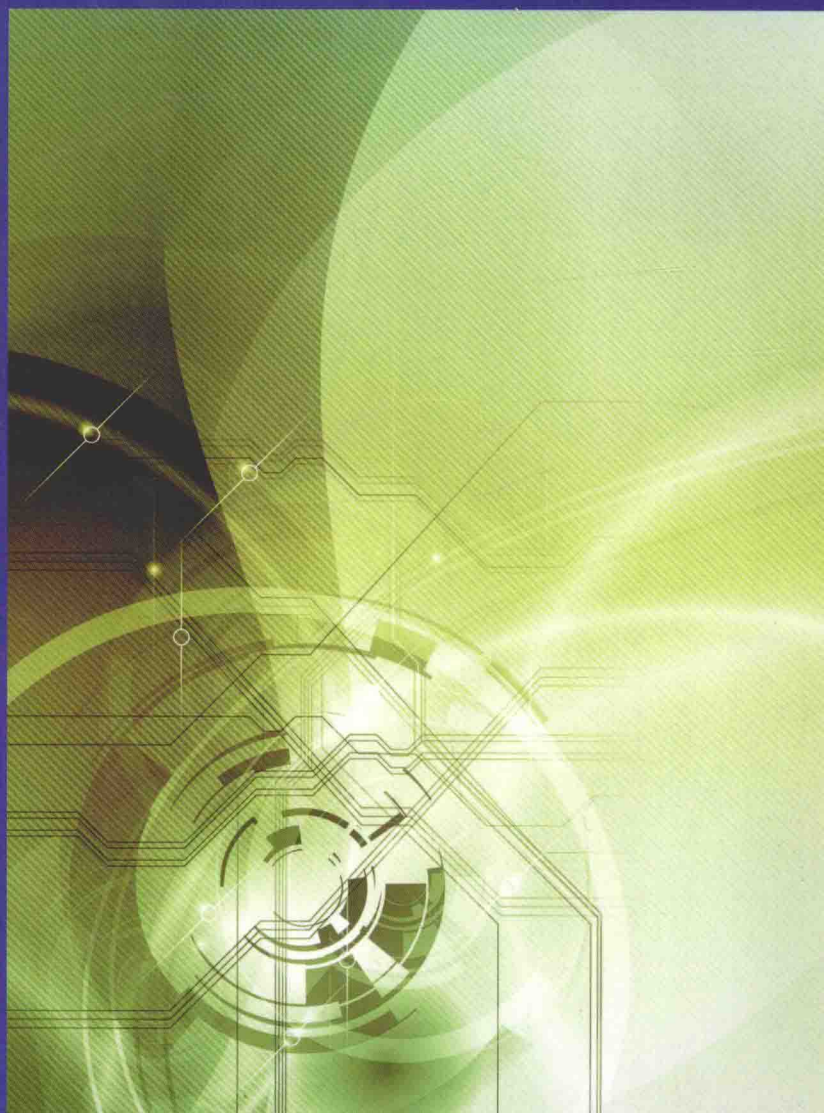


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IT项目管理

[美] 凯西·施瓦尔贝 (Kathy Schwalbe) 著

(英文精编版·第7版)

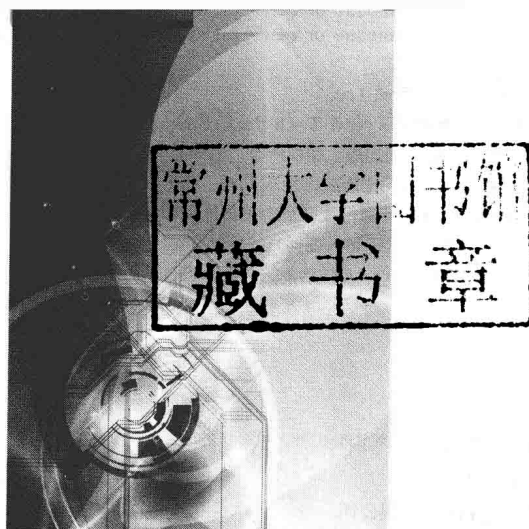


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出版者的话

文艺复兴以来，源远流长的科学精神和逐步形成的学术规范，使西方国家在自然科学的各个领域取得了垄断性的优势；也正是这样的优势，使美国在信息技术发展的六十多年间名家辈出、独领风骚。在商业化的进程中，美国的产业界与教育界越来越紧密地结合，计算机学科中的许多泰山北斗同时身处科研和教学的最前线，由此而产生的经典科学著作，不仅擘划了研究的范畴，还揭示了学术的源变，既遵循学术规范，又自有学者个性，其价值并不会因年月的流逝而减退。

近年，在全球信息化大潮的推动下，我国的计算机产业发展迅猛，对专业人才的需求日益迫切。这对计算机教育界和出版界都既是机遇，也是挑战；而专业教材的建设在教育战略上显得举足轻重。在我国信息技术发展时间较短的现状下，美国等发达国家在其计算机科学发展的几十年间积淀和发展的经典教材仍有许多值得借鉴之处。因此，引进一批国外优秀计算机教材将对我国计算机教育事业的发展起到积极的推动作用，也是与世界接轨、建设真正的世界一流大学的必由之路。

机械工业出版社华章公司较早意识到“出版要为教育服务”。自1998年开始，我们就将工作重点放在了遴选、移译国外优秀教材上。经过多年的不懈努力，我们与Pearson, McGraw-Hill, Elsevier, MIT, John Wiley & Sons, Cengage等世界著名出版公司建立了良好的合作关系，从他们现有的数百种教材中甄选出Andrew S. Tanenbaum, Bjarne Stroustrup, Brian W. Kernighan, Dennis Ritchie, Jim Gray, Alfred V. Aho, John E. Hopcroft, Jeffrey D. Ullman, Abraham Silberschatz, William Stallings, Donald E. Knuth, John L. Hennessy, Larry L. Peterson等大师名家的一批经典作品，以“计算机科学丛书”为总称出版，供读者学习、研究及珍藏。大理石纹理的封面，也正体现了这套丛书的品位和格调。

“计算机科学丛书”的出版工作得到了国内外学者的鼎力相助，国内的专家不仅提供了中肯的选题指导，还不辞劳苦地担任了翻译和审校的工作；而原书的作者也相当关注其作品在中国的传播，有的还专门为其书的中译本作序。迄今，“计算机科学丛书”已经出版了近两百个品种，这些书籍在读者中树立了良好的口碑，并被许多高校采用为正式教材和参考书籍。其影印版“经典原版书库”作为姊妹篇也被越来越多实施双语教学的学校所采用。

权威的作者、经典的教材、一流的译者、严格的审校、精细的编辑，这些因素使我们的图书有了质量的保证。随着计算机科学与技术专业学科建设的不断完善和教材改革的逐渐深化，教育界对国外计算机教材的需求和应用都将步入一个新的阶段，我们的目标是尽善尽美，而反馈的意见正是我们达到这一终极目标的重要帮助。华章公司欢迎老师和读者对我们的工作提出建议或给予指正，我们的联系方式如下：

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PREFACE

The future of many organizations depends on their ability to harness the power of information technology, and good project managers continue to be in high demand. Colleges have responded to this need by establishing courses in project management and making them part of the information technology, management, engineering, and other curricula. Corporations are investing in continuing education to help develop effective project managers and project teams. This text provides a much-needed framework for teaching courses in project management, especially those that emphasize managing information technology projects. The first six editions of this text were extremely well received by people in academia and the workplace. The Seventh Edition builds on the strengths of the previous editions and adds new, important information and features.

It's impossible to read a newspaper, magazine, or Web page without hearing about the impact of information technology on our society. Information is traveling faster and being shared by more people than ever before. You can buy just about anything online, surf the Web on a mobile phone, or use a wireless Internet connection at your local coffee shop. Companies have linked their systems together to help them fill orders on time and better serve their customers. Software companies are continually developing new products to help streamline our work and get better results. When technology works well, it is almost invisible. But did it ever occur to you to ask, "Who makes these complex technologies and systems happen?"

Because you're reading this text, you must have an interest in the "behind-the-scenes" aspects of technology. If I've done my job well, you'll begin to see the many innovations society is currently enjoying as the result of thousands of successful information technology projects. In this text, you'll read about IT projects around the world that went well, including Mittal Steel Poland's Implementation of SAP that unified IT systems to improve business and financial processes; Dell Earth and other green computing projects that save energy and millions of dollars; Six Sigma projects such as the project to improve case load management at Baptist St. Anthony's Hospital in Amarillo, Texas; the systems infrastructure project at the Boots Company in the United Kingdom that takes advantage of supplier competition to cut costs and improve services; and many more. Of course, not all projects are successful. Factors such as time, money, and unrealistic expectations, among many others, can sabotage a promising effort if it is not properly managed. In this text, you'll also learn from the mistakes made on many projects that were not successful. I have written this book in an effort to educate you, tomorrow's project managers, about what will help make a project succeed—and what can make it fail. You'll also see how projects are used in everyday media, such as television and film, and how companies use best practices in project management. Many readers tell me how much they enjoy reading these real-world examples in the What Went Right?, What Went Wrong?, Media Snapshot, and Best Practice features. As practitioners know, there is no "one size fits all" solution to

managing projects. By seeing how different organizations successfully implement project management, you can help your organization do the same.

Although project management has been an established field for many years, managing information technology projects requires ideas and information that go beyond standard project management. For example, many information technology projects fail because of a lack of user input, incomplete and changing requirements, and a lack of executive support. This book includes suggestions for dealing with these issues. New technologies can also aid in managing information technology projects, and examples of using software to assist in project management are included throughout the book.

Information Technology Project Management, Seventh Edition, is the only textbook to apply all 10 project management knowledge areas and all five process groups to information technology projects. As you will learn, the project management knowledge areas are project integration, scope, time, cost, quality, human resource, communications, risk, procurement, and stakeholder management. The five process groups are initiating, planning, executing, monitoring and controlling, and closing.

This text builds on the *PMBOK® Guide, Fifth Edition*, an American National Standard, to provide a solid framework and context for managing information technology projects.

Information Technology Project Management, Seventh Edition, provides practical lessons in project management for students and practitioners alike. By weaving together theory and practice, this text presents an understandable, integrated view of the many concepts, skills, tools, and techniques of information technology project management. The comprehensive design of the text provides a strong foundation for students and practitioners in project management.

NEW TO THE SEVENTH EDITION

Building on the success of the previous editions, *Information Technology Project Management, Seventh Edition*, introduces a uniquely effective combination of features. The main changes in the Seventh Edition include the following:

- Several changes were made to synchronize the Seventh Edition with the *PMBOK® Guide, Fifth Edition*. Changes were made based on the exposure draft released in February 2012. The biggest change was the addition of a tenth knowledge area, Project Stakeholder Management. This text includes a new chapter to address this important topic.
- Includes additional information on agile project management. Chapter 2 includes general information on this popular concept, and Chapter 3 provides a second case study illustrating the outputs produced for the JWD Consulting project when using an agile approach. For example, you can see a sample product backlog, a sprint backlog, a burndown chart, and key artifacts or outputs produced when using Scrum, the most popular agile method.
- A new feature, Global Issues, provides examples of how project management concepts and practices affect people around the globe.
- Updated examples are provided throughout the text. You'll notice several new examples in the Seventh Edition that explain recent events in managing real information technology projects. Several of the What Went Right?, What Went Wrong?, Media Snapshot, and Best Practice examples have been

updated to keep you current. Additional examples and results of new studies are included throughout the text, with appropriate citations.

- User feedback is incorporated. Based on feedback from reviewers, students, instructors, practitioners, and translators, you'll see several additional changes to help clarify information. (This book has been translated into Chinese, Japanese, Russian, and Czech.)
- A new CourseMate site for the Seventh Edition (www.cengagebrain.com) provides access to informative links from the end notes, lecture notes, interactive quizzes, templates, additional running cases, suggested readings, and many other items to enhance your learning.

ACCESSING THE COURSEMATE SITE

To access the CourseMate site, open a Web browser and go to www.cengagebrain.com. Search by ISBN, author name, or title, and click Create My Account to begin the registration process.

APPROACH

Many people have been practicing some form of project management with little or no formal study in this area. New books and articles are written each year as we discover more about the field of project management, and project management software continues to advance. Because the project management field and the technology industry change rapidly, you cannot assume that what worked even a few years ago is still the best approach today. This text provides up-to-date information on how good project management and effective use of software can help you manage projects, especially information technology projects. Six distinct features of this text include its relationship to the Project Management Body of Knowledge, its detailed guide for using Microsoft Project 2010, its value in preparing for Project Management Professional and other certification exams, its inclusion of running case studies and online templates, its companion (premium) Web site, and its inclusion of a 60-day trial of MindView Business software.

Based on *PMBOK® Guide, Fifth Edition*

The Project Management Institute (PMI) created the Guide to the Project Management Body of Knowledge (the *PMBOK® Guide*) as a framework and starting point for understanding project management. It includes an introduction to project management, brief descriptions of all 10 project management knowledge areas, and a glossary of terms. The *PMBOK® Guide* is, however, just that—a guide. This text uses the *PMBOK® Guide, Fifth Edition* exposure draft (2012) as a foundation, but goes beyond it by providing more details, highlighting additional topics, and providing a real-world context for project management. *Information Technology Project Management, Seventh Edition*, explains project management specifically as it applies to managing information technology projects in the 21st century. It includes several unique features to bring you the excitement of this dynamic field. (For more information on features, see the Pedagogical Features section.)

Resource for PMP and Other Certification Exams

Professional certification is an important factor in recognizing and ensuring quality in a profession. PMI provides certification as a Project Management Professional (PMP), and this text is an excellent resource for studying for the certification exam as well as the entry-level Certified Associate in Project Management (CAPM) exam. This text will also help you pass other certification exams, such as CompTIA's Project+ exam. Having working experience on projects does not mean you can easily pass the PMP or other certification exams.

I like to tell my students a story about taking a driver's license test after moving to Minnesota. I had been driving safely and without accidents for over 16 years, so I thought I could just walk in and take the test. I was impressed by the sophisticated computer system used to administer the test. The questions were displayed on a large touch-screen monitor, often with an image or video to illustrate traffic signs or driving situations. I became concerned when I had no idea how to answer several questions, and I was perplexed when the test seemed to stop and a message appeared: "Please see the person at the service counter." This was a polite way of saying I had failed the test! After controlling my embarrassment, I picked up one of the Minnesota driving test brochures, studied it for an hour or two that night, and passed the test the next day.

The point of this story is to emphasize the importance of studying information from the organization that creates the test and not to be overconfident that your experience is enough. Because this text is based on PMI's *PMBOK® Guide, Fifth Edition*, it provides a valuable reference for studying for PMP certification. It is also an excellent reference for CompTIA's Project+ exam. I have earned both of these certifications and kept them in mind when writing this text.

Exercises, Running Cases, Templates, Sample Documents, and Optional Simulation Software

Based on feedback from readers, the Seventh Edition continues to provide challenging exercises and running cases to help students apply concepts in each chapter. The text includes more than 50 templates, examples of real project documents, and information on several simulation software tools that you can use to practice your skills in managing a project. All of these features help the subject matter come alive and have more meaning.

ORGANIZATION AND CONTENT

Information Technology Project Management, Seventh Edition, is organized into three main sections to provide a framework for project management, a detailed description of each project management knowledge area, and three appendices to provide practical information for applying project management. The first three chapters form the first section, which introduces the project management framework and sets the stage for the remaining chapters.

Chapters 4 through 13 form the second section of the text, which describes each of the project management knowledge areas—project integration, scope, time, cost, quality, human resource, communications, risk, procurement, and stakeholder management—in the context of information technology projects. An entire chapter is dedicated to each knowledge area. Each of these chapters includes sections that map to their major processes as described in the *PMBOK® Guide, Fifth Edition*. For

example, the chapter on project quality management includes sections on planning quality management, performing quality assurance, and controlling quality. Additional sections highlight other important concepts related to each knowledge area, such as Six Sigma, testing, maturity models, and using software to assist in project quality management. Each chapter also includes detailed examples of key project management tools and techniques as applied to information technology projects. For example, the chapter on project integration management includes samples of various project-selection documents, such as net present value analyses, ROI calculations, payback analyses, and weighted scoring models. The project scope management chapter includes a sample project charter, a project scope statement, and several work breakdown structures for information technology projects.

PEDAGOGICAL FEATURES

Several pedagogical features are included in this text to enhance presentation of the materials so that you can more easily understand the concepts and apply them. Throughout the text, emphasis is placed on applying concepts to current, real-world information technology project management.

CourseMate

Engagement Tracker

How do you assess your students' engagement in your course? How do you know your students have read the material or viewed the resources you've assigned? How can you tell if your students are struggling with a concept? With CourseMate, you can use the included Engagement Tracker to assess student preparation and engagement. Use the tracking tools to see progress for the class as a whole or for individual students. Identify students at risk early in the course. Uncover which concepts are most difficult for your class. Monitor time on task. Keep your students engaged.

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CourseMate includes interactive teaching and learning tools:

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In addition to interactive teaching and learning tools, CourseMate includes an interactive eBook. Students can take notes as well as highlight, search, and interact with embedded media specific to their book. Use it as a supplement to the printed text or as a substitute—the choice is your students' with CourseMate.

Opening Case and Case Wrap-Up

To set the stage, each chapter begins with an opening case related to the material presented in that chapter. These real-life case scenarios, most of which are based on

the author's experiences, spark student interest and introduce important concepts in a real-world context. As project management concepts and techniques are discussed, they are applied to the opening case and other similar scenarios. Each chapter then closes with a case wrap-up—with some ending successfully and some failing—to further illustrate the real world of project management.

What Went Right? and What Went Wrong?

Failures, as much as successes, can be valuable learning experiences. Each chapter of the text includes one or more examples of real information technology projects that went right, as well as examples of projects that went wrong. These examples further illustrate the importance of mastering key concepts in each chapter.

Media Snapshot

The world is full of projects. Television shows, movies, newspapers, Web sites, and other media highlight project results that are good and bad. Relating project management concepts to the types of projects highlighted in the media helps you understand the importance of this growing field. Why not get people excited about studying project management by showing them how to recognize its concepts in popular television shows, movies, or other media?

Best Practice

Every chapter includes an example of a best practice related to topics in that chapter. For example, Chapter 1 describes best practices written by Robert Butrick, author of *The Project Workout*, from the *Ultimate Business Library's Best Practice* book. He instructs organizations to ensure that their projects are driven by their strategy and to engage project stakeholders.

Global Issues

Every chapter includes an example of global issues of importance today. For example, Chapter 2 describes some of the problems with outsourcing, such as rioting in Beijing when customers could not buy the latest iPhones.

SUPPLEMENTS[⊖]

The following supplemental materials are available when this text is used in a classroom setting. All of the teaching tools available with this text are provided to the instructor on a single CD-ROM or can be accessed with your single sign on (SSO) account at *login*.

Cengage.com/sso.

- **Electronic Instructor's Manual** The Instructor's Manual that accompanies this textbook includes additional instructional material to assist in class preparation, including suggestions for lecture topics and additional discussion questions.
- **Exam View[®]** This textbook is accompanied by Exam View, a powerful testing software package that allows instructors to create and administer printed, computer (LAN-based), and Internet exams. Exam View includes hundreds of questions that correspond to the topics covered in this text, enabling students to generate detailed study guides that include page references for further review. The computer-based and Internet testing components allow

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students to take exams at their computers, and save the instructor time by grading each exam automatically.

- **PowerPoint Presentations** This text comes with Microsoft PowerPoint slides for each chapter. These slides are included as a teaching aid for classroom presentation, to make available to students on the network for chapter review, or to print for classroom distribution. Instructors can add their own slides for additional topics they introduce to the class.
- **Solution Files** Solutions to end-of-chapter questions are available on the Instructor Resource CD-ROM and at the Cengage Learning Web site at *login.cengage.com/ssc*. The solutions are password-protected.

ACKNOWLEDGMENTS

I never would have taken on the project of writing this book, including all the prior editions, without the help of many people. I thank the staff at Cengage Learning for their dedication and hard work in helping me produce this book and in doing such an excellent job of marketing it. Kate Mason, Aimee Poirier, Dan Seiter, Jennifer Feltri-George, Divya Divakaran, and many more people did a great job in planning and executing all of the work involved in producing this book.

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I also thank my students and colleagues at Augsburg College and the University of Minnesota for providing feedback on the earlier editions of this book. I received many valuable comments from them on ways to improve the text and structure of my courses. I learn something new about project management and teaching all the time by interacting with students, faculty, and staff.

I also thank faculty reviewers for providing excellent feedback for me in writing this edition: Brian Cameron, Pennsylvania State University; Jennelle Davis, ECPI University; Wendy Gem Davis, ECPI University; Marcus Goncalves, Boston University; Sue McDaniel, Bellevue University; Dawn Owens, Bellevue University; Arthur Thomas, Syracuse University; and Johnathan Yerby, Macon State College. I also want to thank the many reviewers of the earlier editions of this text. I thank the many instructors and readers who have contacted me directly with praise as well as suggestions for improving this text. I appreciate the feedback and do my best to incorporate as much as I can.

Most of all, I am grateful to my family. Without their support, I never could have written this book. My wonderful husband, Dan, has always supported me in my career, and he helps me keep up to date with software development because he is a lead architect for ComSquared Systems, Inc. Our three children, Anne, Bobby, and Scott, think it's cool that their mom writes books and speaks at conferences. They also see me managing projects all the time. Anne, now 28, teases me for being the only quilter she knows who treats each quilt as a project. (Maybe that's why I get so many done!) Our children understand

the main reason I write—I have a passion for educating future leaders of the world, including them.

As always, I am eager to receive your feedback on this book. Please send comments to me at schwalbe@augsborg.edu.

Kathy Schwalbe, Ph.D., PMP
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ABOUT THE AUTHOR



Kathy Schwalbe is a Professor in the Department of Business Administration at Augsburg College in Minneapolis, where she teaches courses in project management, problem solving for business, systems analysis and design, information systems projects, and electronic commerce. Kathy was also an adjunct faculty member at the University of Minnesota, where she taught a graduate-level course in project management in the engineering department. She provides training and consulting services to organizations and speaks at conferences. She also writes and self-publishes additional books on project management.

Kathy worked for 10 years in industry before entering academia in 1991. She was an Air Force officer, systems analyst, project manager, senior engineer, and information technology consultant. Kathy is an active member of PMI, having served as the Student Chapter Liaison for the Minnesota chapter of PMI, VP of Education for the Minnesota chapter, Director of Communications and Editor of the Information Systems Specific Interest Group (ISSIG) Review, and member of PMI's test-writing team. Kathy earned her Ph.D. in Higher Education at the University of Minnesota, her MBA at Northeastern University's High Technology MBA program, and her B.S. in mathematics at the University of Notre Dame. She was named Educator of the Year by the Association of IT Professionals in 2011. Visit her Web site at www.kathyschwalbe.com.

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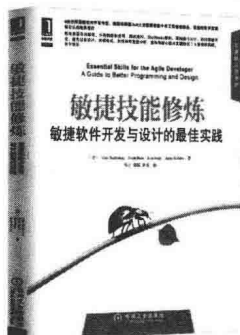
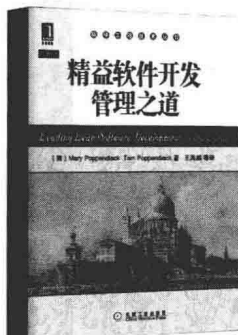
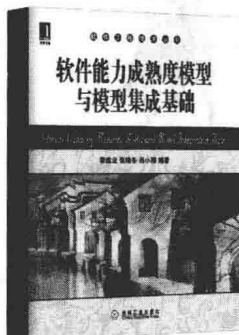
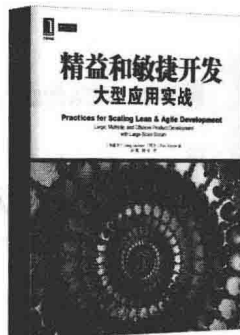
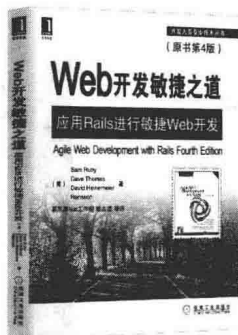
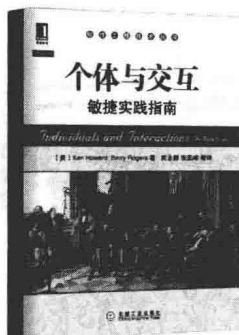
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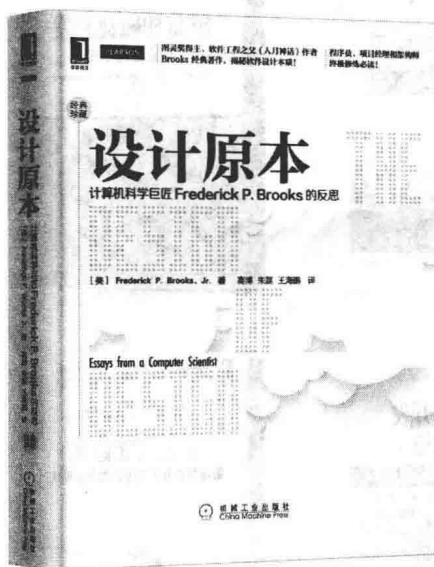
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设计原本（精装本）

如果说《人月神话》是近40年来所有软件开发工程师和项目经理们必读的一本书，那么本书将会是未来数十年内从事软件行业的程序员、项目经理和架构师必读的一本书。它是《人月神话》作者、著名计算机科学家、软件工程教父、美国两院院士、图灵奖和IEEE计算机先驱奖得主Brooks在计算机软硬件架构与设计、建筑和组织机构的架构与设计等领域毕生经验的结晶，是计算机图书领域的又一史诗级著作。

领域特定语言

本书是DSL领域的丰碑之作，由世界级软件开发大师和软件开发“教父”Martin Fowler历时多年写作而成。全面详尽地讲解了各种DSL及其构造方式，揭示了与编程语言无关的通用原则和模式，阐释了如何通过DSL有效提高开发人员的生产力以及增进与领域专家的有效沟通，能为开发人员选择和使用DSL提供有效的决策依据和指导方法。

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