Why Choose Microsoft Project Portfolio Management?
A comparison between the centralized server solution and Microsoft Project 2013 Client

Definition of Microsoft Project Portfolio Management
Microsoft uses the term Project Portfolio Management (PPM) to refer to a group of components that includes Microsoft Project Professional 2013, Project Server 2013 and Project Web App 2013. It is also used for Microsoft Project Online combined with Project Pro for Office 365. These are integrated into SharePoint Server 2013, delivering a common collaboration and information platform available to everyone involved in the project – from general management through to project managers and project participants. This combination provides a proven, centralized solution for successful, enterprise-wide project and portfolio management on-premise or – since the recent availability of Project Online – in the cloud. In contrast, Microsoft Project Standard 2013 is a standalone solution for one workstation and is not designed for collaborative work across departments or projects.

Typical Microsoft Project Portfolio Management Customers
The Microsoft PPM solution is suited to companies that place a lot of importance on centralized project planning and management across multiple projects. They are likely to need functions such as centralized resource management, capacity planning, portfolio management, partially automated approval processes, flexible and eye-catching reports using dashboards and cockpits, among many others.

A role-based solution with multiple options
Unlike Microsoft Project Standard 2013, which is a standalone solution, Microsoft PPM 2013 is a role-based tool that is not only useful for project managers, but for everyone involved in a project, including decision makers. It can be used for all phases of a project, from gathering project ideas and requirements to selecting the “right” projects (from a strategic and business perspective) and from project planning to execution and management.

Depending on the project requirements, the PPM 2013 platform provides out-of-the-box solutions that can be used for individual process steps as well as for a project’s entire lifecycle. These standard solutions can easily be tailored to each company’s specific requirements.

PPM Online Benefits
- Available for use immediately
- No installation necessary
- License/cost flexibility
- No infrastructure costs
- Available from any location
- Accessible with mobile devices
- Seamless online and offline use
- Extendable with web apps
- Ideal for a quick introduction to PPM
- Test system with no risk
- No additional workload for internal IT

PPM Hosting Benefits
- Completely tailored to requirements
- No capital commitment to hardware
- No maintenance costs
- No support costs
- No license purchase costs
- No infrastructure necessary
- Administration by specialists
- Transparent, fixed costs
- No internal services necessary
- One month cancelation period
- No follow-up costs
- Test and integration system

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Gathering project ideas

Using workflows, ideas for a project can be gathered from members of the team. The process starts with the collection of rudimentary data and these suggestions are then enriched with structured data (such as a business plan), making it easier to prioritize one project over another. With SharePoint Designer 2013 and Visio 2013, users can now also create graphical workflows.

Integrated Portfolio Management

The new portfolio management functions in Microsoft Project Server 2013 and in Project Online help companies compile their project portfolio and select the projects to be executed. Selection criteria can be purely financial (budget, resource availability etc.) or include “soft” factors as well (such as customer satisfaction) that companies can define as they wish.
Microsoft Project Standard / Professional /Project Pro für Office 365

Project managers with experience in Microsoft Project 2013 Standard will quickly get to grips with the interface of the Professional version and the cloud-based Project Pro for Office 365 version. The main difference is communication with the server, which is only possible with the Professional and Project Pro versions. A new feature in these versions is that predefined and user-defined reports can be created and viewed directly in Microsoft Project.

Working on projects in the browser with the Project Web App

The new PPM solution also allows users to create and work on projects in the browser-based Web App. This is made easier by the fact that the complete computation logic from the Client version is now available in Project Web App. While the Microsoft Project 2013 Professional and Project Pro for Office 365 client is exclusively used by people involved in detailed project planning and management processes, all other participants and decision-makers only work with the browser-based Project Web App. The advantage of solely using the Web App is that license costs are significantly lower. Project participants can use Project Web App to access an overview of all the work packages assigned to them.
Managers can access the Project Web App anytime to see current reports as well as analyses of the project portfolio. The centralized resource pool gives them a clear overview of the workload of resources that have been assigned to several different projects.

Central and standardized document storage using SharePoint
To facilitate end-to-end project communication, project sites are available on the Windows SharePoint Server, which is the technology underpinning the seamlessly integrated Project Server 2013 and Project Online 2013. It provides a central and standardized way to store documents and update additional information. Topics like risks and problems can be managed using lists that can be assigned to individual projects and/or tasks.

Extensions with Project and SharePoint Apps
A new feature in the 2013 version is that apps can be used to extend the PPM solution’s functional scope. The chart below shows three of these: the TPG MTA Chart app for milestone trend analysis; the TPG Risk Chart app that shows risks in a matrix listed by impact and probability; and the TPG WBS Chart app that lets users create an easy-to-read work breakdown structure.
Optimized for use on mobile devices

Project Online is a new cloud-based solution and is part of Microsoft Office 365, which gives users complete flexibility to work on their projects while they are out of the office. A useful new feature that underlines this commitment to mobility is the ability to hide and show the PWA navigation bar. This makes it easier to view more content on small screens such as tablets.

Project data on the server can also be stored offline if required, making it easier to carry them around and work on them without a server connection. Once the user connects to the server again, the updated information on the local device is synchronized to the server.

Multiple advantages from centralized project data storage

The ability to centralize structured information about all projects is one of the biggest advantages of Microsoft PPM 2013 compared to standalone solutions. Authorized users have a range of other options available to them, including reporting and analyses that are easy to access via SQL Reporting Services. There are also extensive Excel Services and Performance Point Services, both of which are already integrated into SharePoint Server 2013 (Enterprise Version).
The Advantages of Microsoft Project Portfolio Management – Point by Point

Centralized data management

Central data pool: all data are stored on a central Microsoft SQL server in a single database, which provides extensive analysis capabilities.

- Multi-project and portfolio management: important performance data and projects can be quickly monitored and analyzed in the Project Center.
- What-if analyses for portfolios are available to assist with project selection.

Project life cycle with workflows

- Project idea gathering / selection process: A small set of basic data (e.g. topic and project description) is usually enough to start a collection of new ideas. As the selection process continues, more information should be added (e.g. budget, resource and skill requirements etc.). Further selection steps can be workflow-driven and made dependent on approvals if required.
- Project selection / approval process: Based on “hard” criteria (such as budget or resources) and on predefined “soft” criteria (customer satisfaction, market awareness etc.), the system suggests the optimal project portfolio to decision makers. By selecting or changing various parameters, customers can review a number of different scenarios.
- Project planning: Microsoft Project 2013 provides project planners with all the standard options for schedule, resource and cost planning. With the consistent use of the central resource pool on the Project Server, they always have visibility into resource availability and workloads across all projects.
- Project execution: Planned activities are automatically communicated to project participants, making it easier to plan and manage project execution. Team members provide feedback about progress directly within the project plan, so managers can view the status of a project at any time. This makes reporting significantly easier.

The Project Center provides an excellent overview of key performance data, which can be made even clearer with graphics such as configurable traffic-light indicators.
A particular highlight is that updates to project plans can be communicated quickly. In addition, the Project Webspace provides an efficient platform that makes up-to-date project-related content and information available anytime and from any location.

**Collaboration**

- Flexible access to information: viewing and using specific project data in the Project Web App (across projects, departments, and locations, project teams, managers and suppliers) is dependent on permissions.
- Feedback: team members can use the Web App to enter their actuals and work completed as well as their remaining work.
- Depiction of different organization types: centralized directives concerning project and resource structures as well as mandatory information.

**Resource management**

- Enterprise-wide resource pool: this provides an overview of all available resources, their current workload levels and the projects they have been assigned to in order to avoid overload and optimize capacity utilization.
- Skill management: a function for managing the capabilities of each individual resource.
- Generic resources: these facilitate the initial planning of resources based on skills, groups or departments and without naming team members.
- Reservation of resources: this is preparatory step before the firm commitment of resources and enables these resources to be shown separately in the project analysis.
- Budget resources: rough planning on the project level that can be compared later on with the detailed plan.
- Team resources: Process of assigning a task to a team. If a substitution arrangement is in place, any team member can be booked to work on the task.

**Reporting**

- Analyses across projects: project lists can be grouped together and filtered in the Project Web App, and have data fields added to them that are useful for analyses.
- Portfolio reports: browser-based analysis of project and portfolio data in the form of graphics and tables using Online Analytical Processing (OLAP) or OData in Project Online.
- Complete Office integration: this makes it easy to generate status reports in Microsoft Excel or Visio quickly and automatically.
- Export to external systems: reports can be exported to Excel for further editing. Note: Web apps can be used to integrate reports. Examples include TPG’s products TPG MTA Chart for milestone trend analysis, an easy-to-read combination of the history and forecast of selected milestones with a chart showing time-related deviations. Other products include the TPG Risk Chart app that shows risks in a matrix listed by impact and probability, helping project managers to set priorities and develop a response to counter risks; and the TPG WBS Chart app that shows the work breakdown structure and progress overview at the touch of a button.
Documentation (only available with use of project websites in SharePoint Server)
- Centralized document management: this provides a central file storage area in SharePoint and enables documents to be attached to individual tasks.
- Protected project area: every project has its own project area in SharePoint with specific access permissions.
- Management of risks and unresolved issues: additional information on projects and individual tasks in the project plan.
- Cross-referenced information: users can link project documents, lists and tasks to facilitate the retrieval of all interrelated information.
- Easy creation and management of workspaces and sub-workspaces (e.g. for project meetings).
- Fast bidirectional access to and from the project in Project Web App or in the client and from the website to the project.

Data Security
- Built on a database: all data are stored in SQL Server.
- Role and permissions concept: differentiated access for project managers, participants, resource managers, team leaders, executive management etc. Companies can choose between a SharePoint Permission Mode and a Project Server Permission Mode when setting up their role and permission concept.
- Data protection: automatic backups increase security.
- Data recovery: restores the entire database or individual projects and documents.
- Fast and secure data access with SSL encryption.

Integration
- Synchronization with Active Directory: this enables customers to synchronize login data for resources (see also the TPG ResourceLink product that automatically imports resources data).
- Integration with external systems: Microsoft PPM is an extendable platform with a documented database model. It offers full integration with Microsoft Office (TPG products utilize this, e.g. TPG PSLink for integration with SAP).
- Integration with Outlook: project-related timesheet reporting and feedback can be carried out using Outlook.

The Burndown Chart is a completely new report available in Project Client.
Your Microsoft PPM System – targeted to your needs and available fast

Enterprise-wide portfolio and project management increases transparency and efficiency in your company. It’s no surprise that more and more firms are choosing to use it – while optimizing or reorganizing their existing processes. TPG The Project Group helps you make the right decision from the outset – with consulting, implementation and operation.

TPG QuickStart – to get up and running quickly and cost-effectively

TPG QuickStart is a preconfigured PPM solution based on Microsoft Project Server 2010/2013. It meets the majority of requirements for a project and portfolio system and can be set up rapidly – at a fixed price. The implementation comprises the following seven phases.

This approach gives you a fast, cost-effective and successful introduction to Microsoft PPM. It combines generic project management methods with best practices from various industries, delivering the benefits of a PPM solution in just a few days. The platform is ready to use immediately and can be extended as your company grows, eventually becoming an enterprise-wide solution.

How does TPG QuickStart work?

TPG QuickStart gives you immediate access to proven project management methods and functions. It includes a preconfigured security concept, project templates, a pre-populated enterprise resource pool, views and reports, and risk and issue lists for one project lifecycle.

Preconfigured standard functions

Alongside basic functions like project creation, resource planning, time management and analyses, TPG QuickStart also includes calculated fields, selection lists, tables, filters and calendars. This ensures complete support for portfolio management functions. Find out more at www.theprojectgroup.com/quickstart

TPG 5-Phase Method – the enterprise-wide solution tailored to your needs

The TPG 5 Phase Method differs from TPG QuickStart in that it provides a more customized approach. It starts by specifying the exact requirements of the customer.

Based on a pilot system tested under real-life conditions, the solution takes shape and is tailored to your exact needs. If required, it can also be integrated with external systems such as SAP and databases. Find out more at www.theprojectgroup.com/5phasemethod
Technical Requirements for Microsoft PPM 2013

Recommended hardware for Microsoft Project Server 2013
- Physical hardware is recommended, but virtual can be used
- Processor: 64-bit, quad-core, 2.5 GHz per processor core
- RAM: 8GB for Project Server, 16GB for SQL Server
- Disk space required: >200GB
- Available on a single server, multiple servers or a server farm

Software for Microsoft Project Server 2013
- Operating system: Windows Server 2008 R2 (64-bit) with at least Service Pack 1
- Database: SQL Server 2012 (64-bit) or SQL Server 2008 R2 (64-bit) with SP1
- Internet Information Server 7.xx (included in Windows 2008 Server)
- Windows SharePoint Server 2013, Project Server 2013 and Client software

Microsoft Project Online
- Hardware: not necessary
- Browser for Project Web App: Internet Explorer 8, 9, 10, Firefox 10.x+, Safari 5 (Mac), Chrome 17.x.
- Client Software

Client Hardware and Software
- Hardware: PC or laptop (touch features require a touch-enabled device with Windows 7 or Windows 8)
- Operating system: Windows 7, Windows 8, Windows Server 2008 R2 or Windows Server 2012 with .Net 3.5 or later
- Software for project managers: MS Project 2013 Professional (standalone solution) / MS Project Pro for Office 365 (streaming version)
- No access to Project Server 2013 or Project Online with older versions of Microsoft Project or with Project Standard 2013

Scalability
Microsoft PPM solutions are highly scalable. Your solution can run on one PC for a few users and projects or be expanded to run on a server farm supporting several thousand users. TPG can provide several references to support its expertise in scaling Microsoft PPM solutions.