Project and Portfolio Management in Government
Key usage scenarios for Project Online

1. **PROJECT MANAGEMENT**
   - Project planning
   - Project tracking
   - Out-of-the-box reports

2. **RESOURCE MANAGEMENT**
   - Systematic resource requests
   - Visualized heat maps
   - Robust resource analytics
   - Intuitive mobile task and time management

3. **PORTFOLIO MANAGEMENT**
   - Portfolio optimization
   - Prioritization
   - Seamless BI integration

4. **PROJECT COLLABORATION**
   - Office 365 communications
   - Document management
   - Risks and issue management
## MICROSOFT PPM

### MICROSOFT PPM

### OFFICE 365 PLATFORM

### OFFICE 365 INFRASTRUCTURE

<table>
<thead>
<tr>
<th>Project Management</th>
<th>Resource Management</th>
<th>Portfolio Management</th>
</tr>
</thead>
<tbody>
<tr>
<td>Project Collaboration</td>
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</tbody>
</table>

- **Email**
- **Voice**
- **Social**
- **Insights**

- **Documents**
- **Sites**
- **LOB integration**
- **Add-ins**

- **Redundant data centers**
- **99.9% uptime**
- **Compliance**

![Project Collaboration Image](image-url)
Harness the power of the Microsoft Cloud
Incorporate other Microsoft Cloud services for a powerful PPM solution

Enjoy all the benefits of the Microsoft Cloud, a leader in public cloud,

Adhere to broader cloud strategy by adding Microsoft PPM – complete compatibility in the MS O365 stack

Leverage a broad set of innovative cloud services to satisfy growing PPM needs

Government Community Cloud
Government Community Cloud HIGH
Department of Defense Cloud
## Project Online Licensing
### Picking the right SKUs for roles and usage scenarios*

<table>
<thead>
<tr>
<th>User role</th>
<th>Cloud SKU</th>
<th>On-premises SKU</th>
<th>Usage Scenarios</th>
<th>User Experience</th>
</tr>
</thead>
<tbody>
<tr>
<td>Executives</td>
<td><strong>Project Online Premium</strong></td>
<td><strong>Project CAL + Server</strong></td>
<td>Portfolio Management, Resource Management, Program Management, Project Management</td>
<td>Web browser + Rich client</td>
</tr>
<tr>
<td>Portfolio Managers</td>
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<td>Project Collaboration</td>
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<tr>
<td>Resource Managers</td>
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<tr>
<td>Program Managers</td>
<td><strong>Project Online Professional</strong></td>
<td><strong>Project Standard Project Professional</strong></td>
<td>Program Management, Project Management, Project Collaboration</td>
<td>Web browser + Rich client</td>
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<tr>
<td>Project Managers</td>
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<tr>
<td>Team Members</td>
<td><strong>Project Online Essentials</strong></td>
<td><strong>Project CAL + Server</strong></td>
<td>Project Collaboration</td>
<td>Web browser</td>
</tr>
</tbody>
</table>

* The matrix represents a generic recommendation of SKUs for roles and scenarios. Specific needs may alter this recommendation.
**Project Online Subscriptions**

<table>
<thead>
<tr>
<th>Features</th>
<th>Project Online Essentials</th>
<th>Project Plan 3</th>
<th>Project Plan 5</th>
</tr>
</thead>
<tbody>
<tr>
<td>Update Tasks, Issues &amp; R</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<tr>
<td>Submit Timesheets</td>
<td>●</td>
<td>●</td>
<td>●</td>
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<tr>
<td>Share documents &amp; Collaborate with Skype for Business presence</td>
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<td>●</td>
<td>●</td>
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<tr>
<td>Project Desktop Client</td>
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<td>●</td>
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<tr>
<td>Web Interface for Project Management</td>
<td></td>
<td>●</td>
<td>●</td>
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<tr>
<td>Project Scheduling and Costing</td>
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<td>●</td>
<td>●</td>
</tr>
<tr>
<td>Manage Project Resources</td>
<td></td>
<td>●</td>
<td>●</td>
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<tr>
<td>Publish projects to the cloud</td>
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<td>●</td>
<td>●</td>
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<tr>
<td>Portfolio Selection &amp; Optimization</td>
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<td>●</td>
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<tr>
<td>Demand Management</td>
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<td>●</td>
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<tr>
<td>Enterprise Resource Management</td>
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<td>●</td>
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<tr>
<td>Out-of-the-box Portfolio Reporting</td>
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<td>●</td>
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**Your Microsoft licensing reseller will provide pricing for each plan upon request**
# Project Product Comparison

<table>
<thead>
<tr>
<th>TEAM MEMBER</th>
<th>Update tasks, issues, Risks</th>
<th>Submit timesheets</th>
<th>Share documents</th>
<th>Collaboration</th>
</tr>
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<tr>
<td>PROJECT MANAGEMENT</td>
<td>Project Desktop Client</td>
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<tr>
<td>ENTERPRISE VALUE</td>
<td>Group Policy</td>
<td>Volume Activation</td>
<td>Terminal Service</td>
<td>VDI</td>
</tr>
<tr>
<td>SUBSCRIPTION TYPE</td>
<td>Click to Run Deployment</td>
<td>Version Upgrades</td>
<td>Roaming Apps</td>
<td>Transitions right to Office 365</td>
</tr>
<tr>
<td>LICENSE TYPE</td>
<td>License Type</td>
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</tr>
<tr>
<td>ONLINE</td>
<td>Project Online Essentials</td>
<td>Project Plan 3 Professional</td>
<td>Project Plan 5 Premium</td>
<td></td>
</tr>
</tbody>
</table>

<sup>1</sup>Only CAL rights. Requires Project Server to be purchased separately.<br><sup>2</sup>Publishing to Server only; publishing to cloud requires a Cloud SKU.<br><sup>3</sup>Subscription licenses available through the Enterprise Agreement Subscription, Open Value Subscription, and Enrollment for Education Solutions programs.
Plan

Select effective portfolios and devise pragmatic project plans

Conduct high-level portfolio planning

Select the right projects

Develop realistic project plans

Manage resource demand and assignments

Manage large programs
Develop realistic project plans
Converge data points from across the business to create an accurate execution plan

Get started fast with premade templates, or build one from scratch to meet specific requirements

Create a work breakdown structure (WBS), map task dependencies and estimate work and task durations

Forecast role-based demand for resources

Devise a realistic project plan that considers multiple planning dimensions like resource availability, task dependencies etc.
Manage projects your way
Gain project management flexibility with native agile and waterfall support

Leverage agile templates, reports, and Scrum- or Kanban-style board views to **track projects your way**

Create **new agile projects or apply agile views** to existing waterfall projects

Use a combination of agile and waterfall methodologies for a **bimodal, balanced approach** to meet specific project needs
Manage large programs
Meet the unique management needs of large programs

Establish **program-specific standards**, like templates, views, and reports

**Segregate program segments** across different project managers as a best practice for managing large initiatives

Use **built-in collaboration tools** to drive alignment and boost communications among program teams

Gain **program insights** with detailed and highly visual reports
Boost efficiencies with self-reliant teams
Empower team members to propose changes and submit time and task updates from anywhere

Enter **time and task status updates** for all project and non-project work in a single place

**Empower team members** to add new tasks and amend assigned work as projects evolve

Encourage individuals to **self-assign to “team tasks”**

![Image of Office 365 Project and Timesheet](image)
Assess the impact of new and updated work
Understand how resource and budget requirements change as projects evolve

Regulate change management by vetting submitted updates

Compare progress updates to baseline plans to assess the impact on project goals

Adjust and formalize project plans by publishing modifications for all stakeholders to see
Visualize project metrics with Power BI reports

Instantly create a variety of status reports to track and communicate performance

Create powerful status reports (see partial list below) in one click to track progress and identify negative trends in progress:

- Burndown
- Cost Overview
- Overallocated Resource
- Earned Value

Leverage rich Power BI dashboards and reports to communicate project status and grab management’s attention.
Execute
Orchestrating execution and help ensure performance and outcomes are on track

Boost efficiencies with self-reliant teams

Assess the impact of new and updated work

Gain at-a-glance portfolio insights
Collaboration

Boost teamwork through inherent collaboration through Office 365

A Day in the Life of a Team Member
A Day in the Life of a Project Manager
A Day in the Life of a Portfolio Manager

Connecting Project Team through Project Sites
Collaborate in the cloud
Leverage the Microsoft Cloud to boost coordination across project teams

Enable real-time access to project information from virtually anywhere to **connect geographically dispersed project teams**

Leverage native mobile apps for **collaboration on the go**
Improving Performance and Efficiency
Instantly create a variety of status reports to make objective project adjustments

Create **powerful status reports** (see partial list below) in one click to track progress and identify negative trends in progress:
- Burndown
- Cost Overview
- Overallocated Resources
- Earned Value

Rich **dashboards highlighting:**
- Portfolio Performance
- Resource Availability
- Project Status Reports

**Quickly gain insights** using preconfigured dashboards and reports for portfolios, programs, projects, tasks, and resources

Enable real-time decision making with **anywhere access to insights** across most browsers and on the native iPad app
Portfolio Planning and Project Intake

Ideate and develop project proposals that advance strategic goals

Establish standards and governance

Translate strategy into actionable goals

Capture business demand

Capture Ideas
Project Intake
Establish Standards and Governance

Use workflows to help ensure projects follow a desired lifecycle

Create custom templates or reuse out-of-the-box templates for each type of initiative (e.g., project, program, etc.)

Create custom views and reports for simplified communications and decision making

Implement and adhere to industry standards and preferred PPM techniques
Translate strategy into actionable goals
Define business drivers to help achieve results that advance corporate strategy

Define **business drivers** for each portfolio (e.g., product division portfolio, IT portfolio, etc.)

Develop a **quantitative impact scale for each business driver**

**Assign weights to business drivers** to help decision makers prioritize goals

**Communicate business drivers** to all stakeholders
Optimize your Projects
Devise portfolios that maximize efficiencies and honor constraints

Feed the optimization model with resource and financial constraints

**Force mandatory, preapproved projects**, like regulatory initiatives, into the portfolio

**Model what-if scenarios to compare alternative portfolios** for more informed portfolio selection

**Formalize project approvals** by selecting the optimal portfolio

**Perform ongoing portfolio optimization** as new work emerges or business priorities change

According to Forrester, 75% of surveyed companies experienced **better strategic and organizational alignment** with Microsoft PPM

Value of Microsoft

Harness cutting-edge cloud technology to boost the Microsoft PPM experience