

WHY MICROSOFT PROJECT SERVER / PROJECT ONLINE?

The Advantages of an Enterprise-Wide Microsoft Project Solution

Microsoft has delivered a server version of Microsoft Project since 2002. In the meantime, it has become a standard in many companies' project environment. But there are many companies, who are still working with Microsoft Project Client – unfamiliar with the advantages of Microsoft Project Server.

It will provide project and program managers, IT decision-makers or PMO members with arguments for Microsoft Project Server or the cloud-based version Project Online. You will also become familiar with the differences compared to the single-user tool Microsoft Project Standard.

This document addresses an audience looking for an expandable and performant software for enterprise-wide multi-project management tried and tested over the long term with a plethora of references and customer success stories.

WHAT IS MICROSOFT PPM?

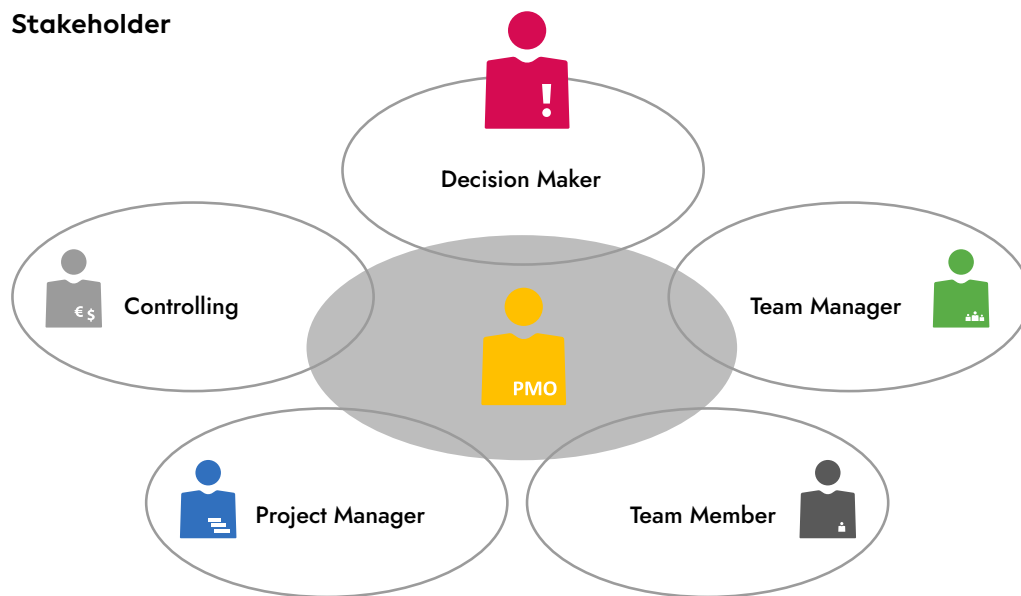


Figure: Microsoft PPM supports all roles of portfolio and project management

Unlike the file-based standalone tool on the desktop, the enterprise-wide solution for project and portfolio management is based on a server with central data storage. Microsoft refers to it as Project and Portfolio Management from which the acronym **Microsoft PPM** is derived. **Microsoft PPM** supports all roles in enterprise-wide project and portfolio management. What it offers:

- » Central configuration and standardization
- » Central resource administration and reporting
- » Role-specific use and access
- » Individual expandability and integration with other systems

Microsoft PPM is available on-premises or in the cloud. It is fully integrated in SharePoint Server as well as SharePoint Online.

THE COMPONENTS OF ON-PREMISES MICROSOFT PPM

A PPM solution installed and operated at your own company, i.e. “on-premises”, requires the following components:

- » Microsoft Project Server incl. Project Web App
- » Microsoft SharePoint Server
- » Microsoft SQL Server
- » Microsoft Project Professional or Microsoft Project Online Desktop Client

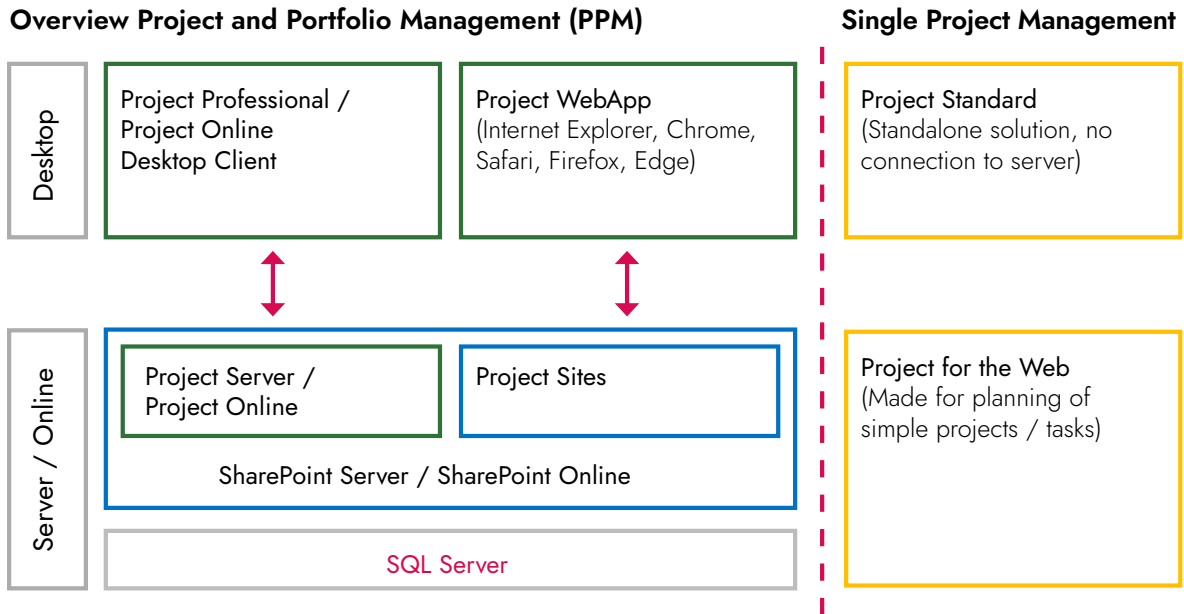
THE COMPONENTS OF MICROSOFT PPM IN THE CLOUD

Project Online provides all capabilities of the on-premises solution. When it comes to the integration with Microsoft 365, it offers even more. There are different licenses available taking into account the functional needs for different roles:

- » Microsoft Project Online Essentials for Team Members with limited functionality
- » Microsoft Project Online Plan 3 incl. Project Web App & Microsoft Project Online Desktop Client for Project Managers
- » Microsoft SQL Server
- » Microsoft Project Online Plan 5 incl. Project Web App & Microsoft Project Online Desktop for Administrators, Resource Managers and Portfolio Managers

THE COMPONENTS OF MICROSOFT PPM AT A GLANCE

The figure below provides an overview of the components of a **Microsoft PPM** solution. Below, you will find out more about the individual components.



D E S K T O P

MICROSOFT PROJECT DESKTOP APPLICATION – PROJECT PLANNING FOR PROJECT MANAGERS

Microsoft Project is the world-renowned powerful planning tool. It provides the responsible project manager with the necessary functions for the effective planning and controlling of schedules, resources and costs. The graphical representation of project data for reports is another feature. The desktop application is available in the following versions:

- » Microsoft Project Standard
- » Microsoft Project Professional
- » Microsoft Project Online Desktop Client

Microsoft Project Standard is a standalone tool. It is not meant for use across departments or projects. It does not offer the connection to Microsoft Project Server / Project Online.

Microsoft Project Professional can be used as a standalone tool or connected to a server. It also possesses additional functions. This version is the basis for working in a multi-project environment with an on-premises Project Server and Project Online. In the classic installation process, your IT administration uses local installation packages.

Microsoft Project Online Desktop Client is the cloud version of Microsoft Project Professional. It can be used as a standalone tool but also in connection with Project Server on-premises or Project Online. Besides the classic installation, it can be downloaded or updated from the Microsoft Cloud. This is important, as new functions are made available in Project Online on a regular basis. Those functions can only be used with this version.

MICROSOFT PROJECT SERVER – THE CENTRAL PLATFORM SOLUTION

Microsoft Project Server is a flexible platform for multi-project and portfolio management. As a central solution, Project Server provides you with well-tried capabilities for planning, reporting, and project team collaboration. In addition, it supports resource management. It enables the central and uniform storage of your company's project and resource data.

Microsoft Project Server is a service within Microsoft SharePoint. Along with Microsoft SQL-Server, the latter is installed and operated "on-premises" as part of your infrastructure. Thus, the integration in Microsoft SharePoint Server is available to you. This means that, within this solution, you can use functions for file management and collaboration for increased team efficiency.

PROJECT ONLINE – THE CLOUD SOLUTION

As a component of Microsoft 365, Project Online is a service provided by Microsoft in the cloud. The range of functions corresponds to Microsoft Project Server. However, Project Online is continuously extended with new functions. You can subscribe to Project Online as required. You will not need your own server infrastructure at your company. The users connect their Microsoft Project desktop application directly to the service running in the cloud. Or they access the Project Web App directly from their browser.

PROJECT FOR THE WEB – MULTI-PROJECT MANAGEMENT ONLY WITH EXTENSION

Project for the Web is intended for planning simple projects and tasks. It provides a modern graphical user interface and more favorable license conditions. This is because Microsoft does without functionalities for multi-project management, resource management and customization. With the aid of **extensions using the Microsoft Power Platform** in M365 (e.g. **TPG Project Power Pack**), Project for the Web also provides the option to build high-quality corporate solutions.

MICROSOFT PROJECT WEB APP – PROJECT ACCESS FOR ALL PARTICIPANTS IN THE BROWSER

The browser-based Microsoft Project Web App is available both in Microsoft Project Server and in Project Online. With all established browsers, its users have role-specific access to central data, resources and functions. It allows project managers to plan projects. However, the desktop version offers a notably higher range of functions.



Note: In addition to the components for the on-premises or cloud solution, Microsoft uses its own terms to distinguish between the different licensing options. Find out more in the chapter: „**Microsoft PPM** in the Cloud – Licenses”.

THE MOST IMPORTANT ADVANTAGES OF MICROSOFT PPM

Below, you will find the most important advantages of the server-based solution **Microsoft PPM** over the simple standalone tool without connection to a server.

1. TRANSPARENCY AND GOOD BASES FOR DECISION-MAKING

Using **Microsoft PPM** as the enterprise-wide portfolio and project management solution, you will achieve one thing: Transparency in the multi-project environment. This transparency will become the basis for correct decisions at all levels.

Dashboards will help you to identify variances in the current portfolio. The central overview takes you to the relevant projects via drill-down. There, status reports and various graphical representations will inform you about the reasons for the current status of every single project.

Your advantage over the standalone tool: You have a complete overview of all running projects, deadlines, states and responsibilities – the best possible decision-making basis available at all times.



Figure: Microsoft PPM is the basis of a central portfolio & project management solution and offers options to drill down to reporting details.

2. CENTRAL PROJECT LIST

As a project manager, you work with the Microsoft Project desktop application as usual. But you save your projects in Project Server or Project Online rather than as files. This provides all stakeholders with a central project list. Depending on permissions, this list is easy to access via the Project Web App. It only shows the projects you are authorized to see.

Administrators can create additional user fields for projects. This makes it possible to display further information such as the project status, the site, developed product, name of the customer, budget, total costs, risks, etc. A current and meaningful project list is the most important step in multi-project management. The perfect basis for all evaluations and decisions in portfolio meetings and steering committees.

Your advantage over the standalone tool: You have a complete overview of all running projects, deadlines, states and responsibilities. This provides you with the best possible basis for decision-making at all times.

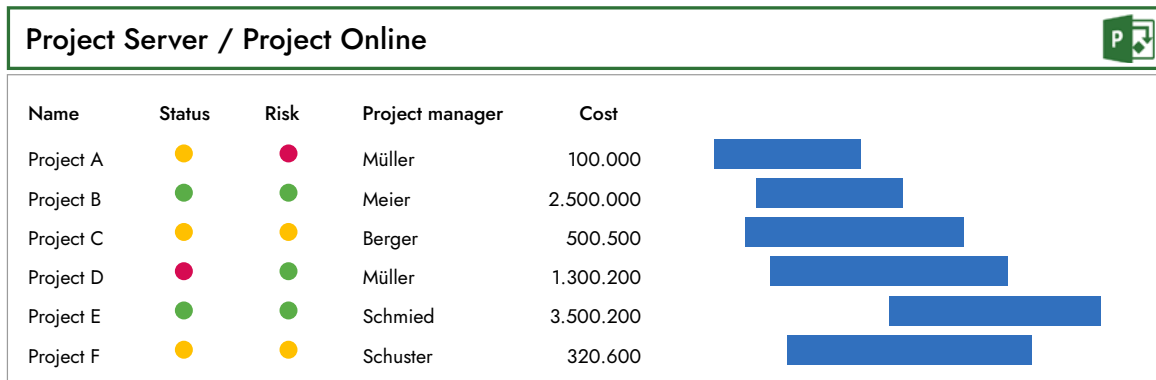


Figure: The central project list in the Project Center shows all the important information at a glance

3. WORKFLOWS AND PORTFOLIO PLANNING

Depending on the company organization and the type of project, it can make sense to divide the project initiation into steps with different authorization levels and permissions. You define this process in **Microsoft PPM** via workflows that can be started directly from the Project Center. As a rule, it is also very important to select the projects in line with corporate strategy. **Microsoft PPM** allows you to assign strategic drivers to the projects. Through the specification of budgets and available resources, **Microsoft PPM** suggests which projects you should select with due regard to the priorities. And which ones could be started later or not at all.

Your advantage over the standalone tool: You are equipped with the capability to prepare the selection of projects centrally. Objective investment decisions mean that you work only on the right projects.

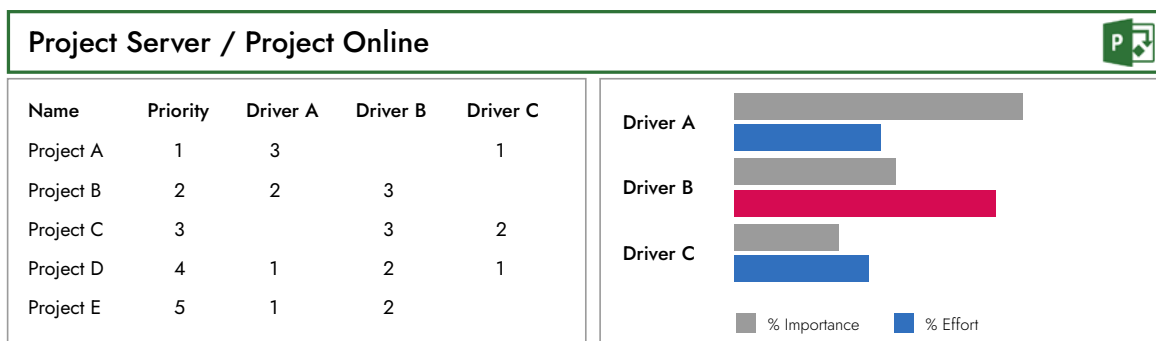


Figure: The portfolio management function supports you in the selection of the projects. The highest effort should go towards the most important projects. Thus, imbalances can be pointed out directly, as in the example above.

4. SHARED RESOURCE POOL

Microsoft PPM features a central resource pool. All projects have access to it.

The advantages:

- » You ensure the central and correct maintenance of capacities and qualifications
- » All resource assignments are visible across projects
- » In contrast to Project Standard, you have a functioning basis for your multi-project planning – even with hundreds of projects and several thousand resources.

You can also represent the company organization in the resource pool. Enterprise custom fields allow you to maintain skills, sites, and other information. Calendars, vacation and cost rates are also stored centrally. In accordance with the access permissions, these data are available in the Project Web App for evaluation. You can see the cross-project work load per staff member. And what tasks the latter are working on.

Your advantage over the standalone tool: You always have the complete and enterprise-wide overview of the resource utilization and deployment. You can see if staff members are over-allocated. And if there are remaining capacities for new projects.

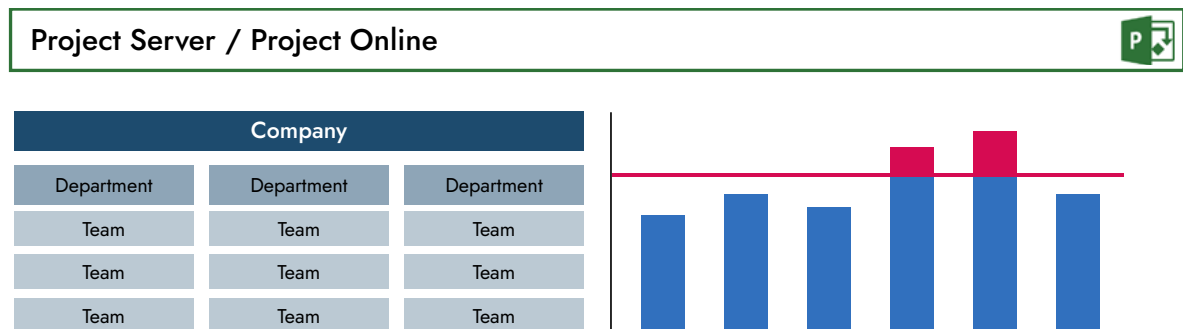


Figure: The central resource pool shows the assignment and workload of staff members

5. PERSONAL RESPONSIBILITIES AND TIME TRACKING

Via the Project Web App, your team members can see all projects for which they are assigned. Likewise, they can record their actual hours and add comments. This is how the status of tasks and work packages can be documented in a transparent and direct way.

If you are using a standalone tool without connection to Project Server / Project Online, the exchange of information between project manager and team is more cumbersome. The project manager has to collect the actual hours of the team members and enter them into the project plan manually. Then, he or she has to inform the team members about their individual resource utilization (e.g. via PDF).

Microsoft PPM transfers the entries the staff members made in the Project Web App into the plan on the Project Server with one click. And the generation of reports aggregated across all relevant projects is possible.

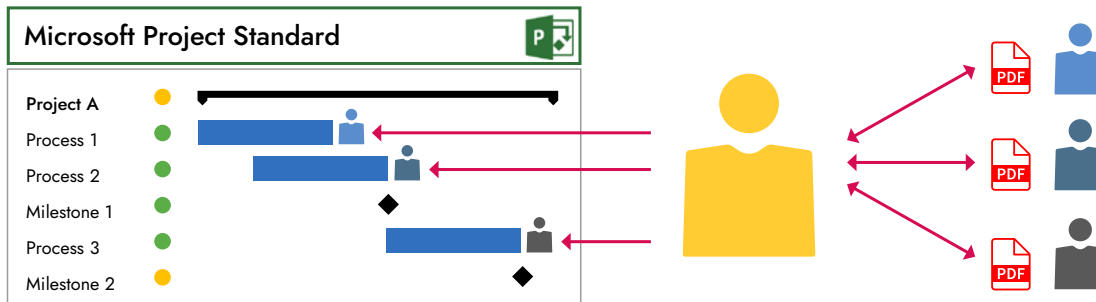


Figure: Cumbersome time tracking and file-based assignment of tasks without **Microsoft PPM**

Your advantage over the standalone tool: The project managers are relieved from manual tasks, such as information collection and data entry. Staff members can see their individual tasks and are able to report actual hours or the progress made.

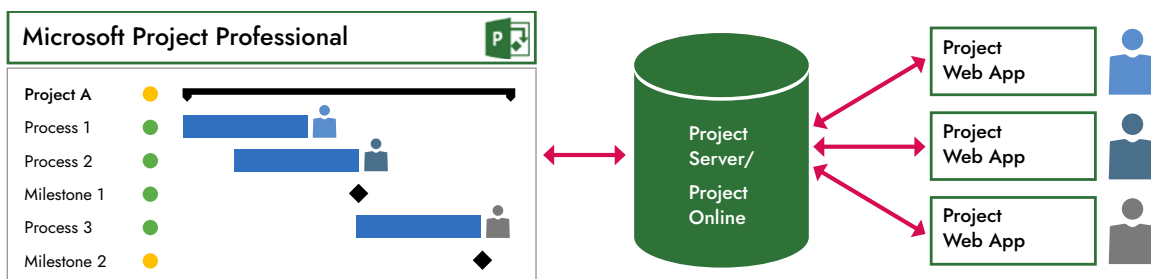


Figure: The Project Web App gives staff members access to their information and allows them to report actual hours or the progress made.

6. PROJECT-SPECIFIC WORKSPACES

Besides the project plan, you tend to require various other documents and data during project executions. In the standalone tool Project Standard, it is necessary to create additional folders in which you save the documents. What is more, they are not automatically linked to the corresponding project. In this case, lists usually consist of Excel files, which cannot be edited simultaneously and do not have a history.

Microsoft PPM, on the other hand, is a tool already running in the Microsoft SharePoint environment. Therefore, it provides all advantages for team collaboration.

From different templates, it is possible to create a project website automatically for every project. This website already contains documents and lists. SharePoint makes lists available to all authorized team members for simultaneous editing. Project managers are the administrators of their project-specific websites and can edit them as required. In this activity, they are independent from internal IT.

In the Microsoft App Store, you can also obtain suitable enhancements from a range of offers for their project website, for example: Risk analyses, Milestone Trend Analyses, WBS charts, etc.

Your advantage over the standalone tool: The central storage of documents for each project in one database means you have fewer losses due to internal friction. And your communication becomes much more efficient.

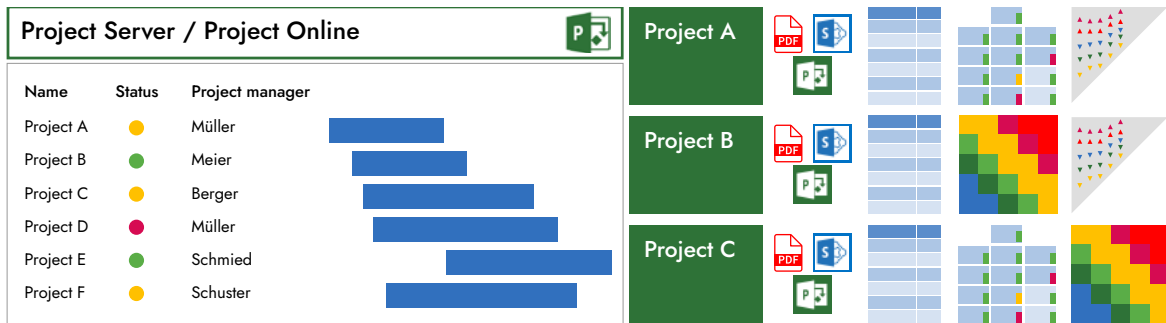


Figure: Project-specific websites assemble all documents and information on the project in a central place.

7. HANDLING CROSS-COMPANY PROJECTS

Many companies are working with external partners and contractors. In most cases, you will not want them to access your internal infrastructure. Project Online offers a modern solution for this business case. Depending on permissions, every stakeholder gets access to a joint planning environment in the cloud and therefore outside of your company. Thereby, you avoid potential security risks and reduce the effort for your own IT's digital rights management. What is more, you are flexible timewise in making the environment available to the participants. This is possible at a reasonable price, and accounting is transparent.

Your advantage over the standalone tool: Even outside the company, you handle your projects securely with the aid of a transparent permissions system.

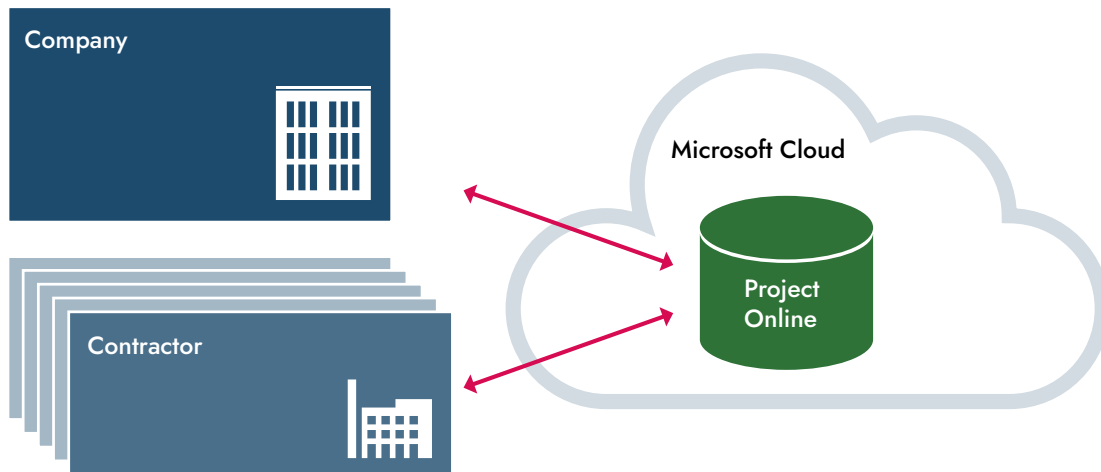


Figure: Project Online provides a secure solution for cross-company projects.

ADVANTAGES OF MICROSOFT PPM WITH ADD-ON PRODUCTS

Two options make **Microsoft PPM** particularly attractive: you can enhance the **Microsoft PPM** platform with additional products. And you can integrate it with other business systems. These options enable you to have the best possible decision-making bases at the highest process efficiency.

ENTERPRISE-WIDE SOLUTION WITH INTEGRATION

Microsoft PPM offers many possibilities for setting up enterprise-wide project and portfolio management. Moreover, you can integrate other systems and processes. The tool provides a comprehensive interface for the automated import and export of master data, project, resource and task data. Many Project Web App contents regarding costs, scheduling, etc. can be integrated into other portals.

Through Web Add-Ins, it is possible to view external contents on the project websites or also on the Project Details page. Web Add-Ins allow you to roll out company-specific solutions centrally step by step. The advantage is that your project managers can simply use these solutions without having to create them themselves. This involvement of other roles at the company will help you increase effectiveness and efficiency in project and portfolio management.

- » **Connection to ERP systems:** By synchronizing the project structures with the cost structures in your ERP system, you optimize the collaboration of project management, controlling and accounting. This is the basis for transferring the forecast from projects to e.g. SAP. In addition, this allows you to transfer the pending commitments and actual costs accrued from SAP to the projects. Depending on the business case, actual hours can also be synchronized in both directions.

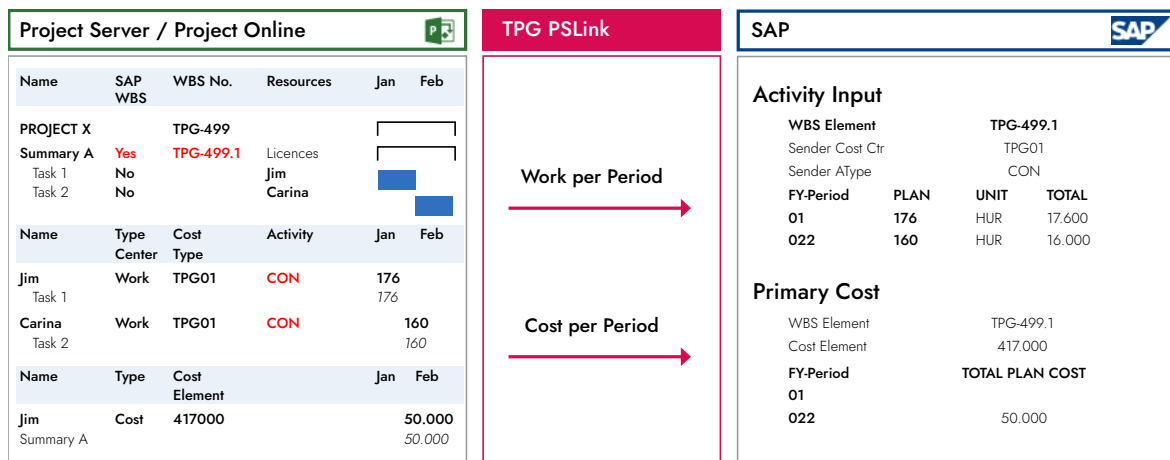


Figure: Transfer of planned work and cost from **Microsoft PPM** to SAP (e.g. via the **Middleware TPG PSLink**)

- » **Connection to work management systems:** The connection to work management systems, such as for example Jira or Azure DevOps, is another useful integration option with **Microsoft PPM**. In such a case, the work packages created in the projects are planned in more detail in Jira, i.e. with issues and actions. They are also updated and reported there. The results are transferred back to the projects. This makes the collaboration between project managers and team members much more efficient and more accurate through documentation.

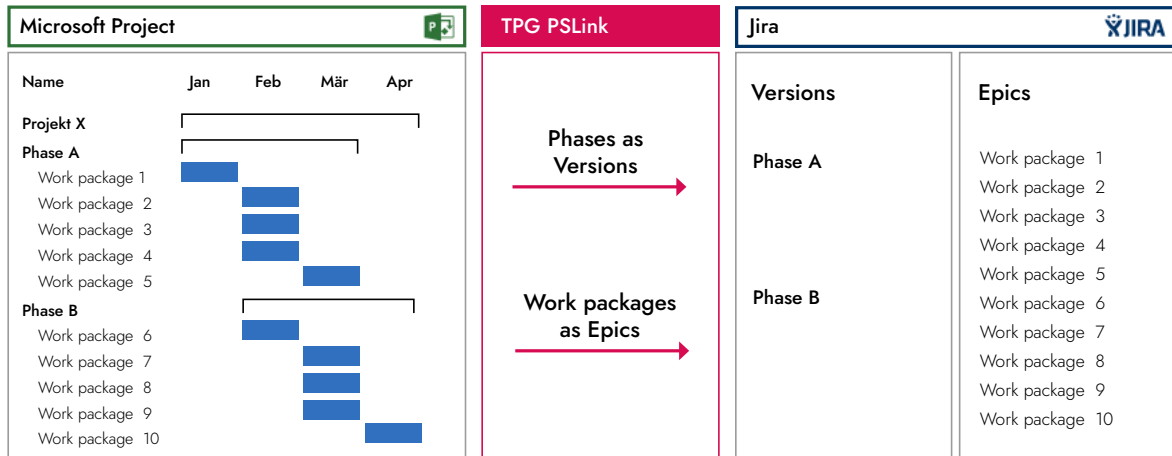


Figure: The integration of Jira or Azure DevOps makes it possible to plan work packages and project tasks with the suitable tool in each case.

» **Connection to CRM systems:** The connection to a CRM system facilitates the automated creation of projects in the sales process. Besides the project number, it is possible to transfer customer data as well as budgets, sales price and delivery dates. In the course of the offer phase and during project implementation, these continue to be synchronized.

ENTERPRISE-WIDE SOLUTION WITH MULTI-PROJECT / PROGRAM MANAGEMENT

Cross-project links in programs are a huge challenge. By combining top-down targets and bottom-up responses for important milestones, you can master these reliably. You automatically create any required cross-project milestone overviews. These you can update at any time at the click of a mouse.

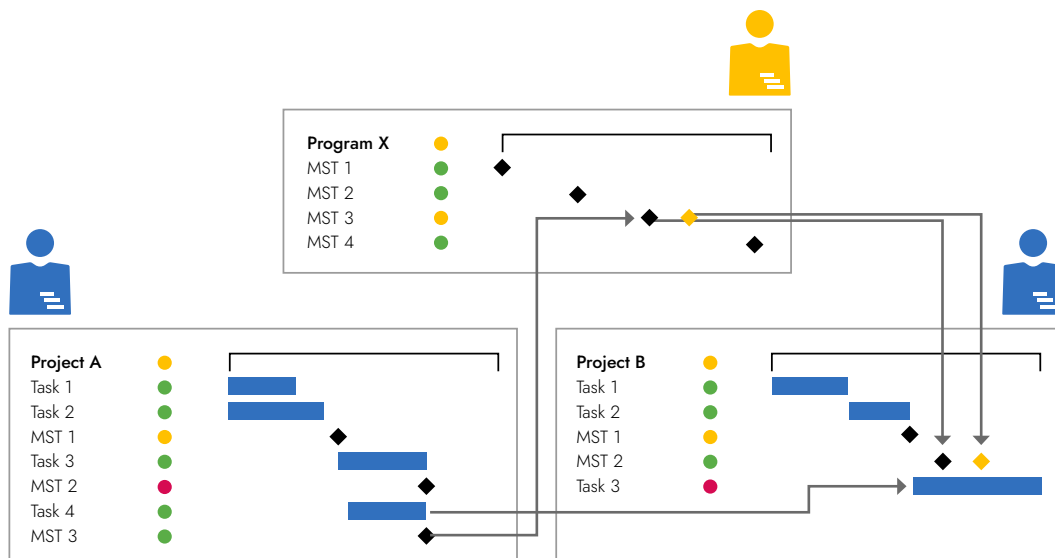


Figure: You can stay on top of program management with **Microsoft PPM** and an extension tool (**TPG ProjectLink**).

ENTERPRISE-WIDE SOLUTION THROUGH OPTIMAL RESOURCE COORDINATION

Your resource planning in the matrix organization will only function optimally under one essential condition. Besides the project managers, you will have to involve the team leaders in the planning process. The team leaders commit the resources requested by the projects. On the other hand, they plan all operations (**TPG CoReSuite Team Manager App**) outside of projects. Only this aspect makes the overview of available capacities complete and leads to the desired success in resource planning.

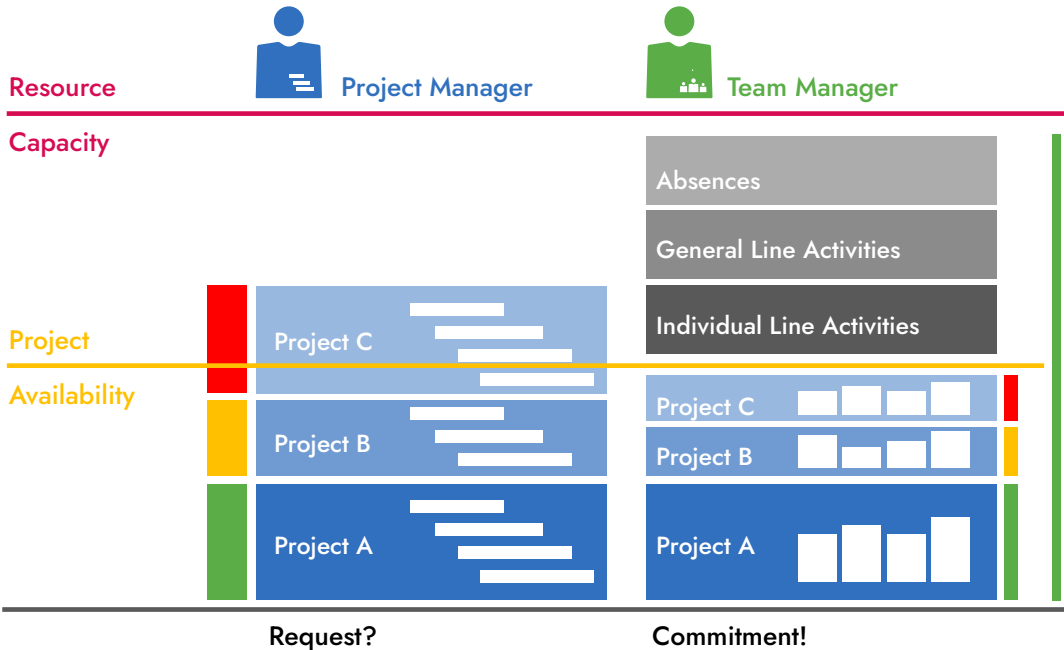


Figure: Resource commitments to the project managers become more reliable through coordination with the team leaders

MICROSOFT PPM IN THE CLOUD – LICENSES

In the last few years, the IT services on offer are moving more and more towards cloud solutions. Therefore, we will go into more detail on the Project Online environment here, Microsoft's offer for project and portfolio management in the M365 cloud. Please find an overview of the Project Online licenses and their prices below.

MICROSOFT 365 SERVICE

Project Online Essentials

(additional license for project teams, only in combination with Project Online Professional / Premium)

Project Online Plan 3

(additional license for project teams, only in combination with Project Online Professional / Premium)

Project Online Plan 5

(additional license for project teams, only in combination with Project Online Professional / Premium)

TARGET GROUP

Team members

Project managers,
program managers

Resource managers, PMO, decision-makers, administrators

	Project Online Essentials	Project Online P3	Project Online P5
Update Tasks, Issues, Risks	X	X	X
Submit Timesheets	X	X	X
Share docs & collaborate with Skype for Business	X	X	X
Project Desktop Client		X	X
Web Interface for Project Management		X	X
Project Scheduling / Costing		X	X
Manage Project Resources		X	X
Publish Projects to the Cloud		X	X
Portfolio Selection & Optimization		(Single projects only)	X
Demand Management		(Create project only, no project approval)	X
Enterprise Resource Management		(Resource request only, no resource commitment)	X
Out-of-the-box Portfolio Reporting			X

Figure: Application areas of the licenses in the Project Online environment

PROJECT PLAN 3	PROJECT PLAN 5	PROJECT ONLINE ESSENTIALS
25,30 €	46,40 €	5,90 € / 7,90 €
user / month (annual subscription, Price does not include VAT)	user / month (annual subscription, Price does not include VAT)	Zusätzlich buchbar zu Project Plan 3 oder 5 user / month (annual / monthly subscription, Price does not include VAT)

Figure: Prices for Project Online licences in the EU-Cloud (06/2022)

TPG – MICROSOFT CLOUD PROVIDER (CSP)

As a Microsoft Cloud Solution Provider (CSP) Indirect Reseller, TPG The Project Group supports you on your way into the Microsoft Cloud. We offer the comprehensive Microsoft 365 Enterprise or Business packages and provide everything you need from a single source:

- » Identification of your actual requirements
- » Consulting regarding the appropriate solution
- » Procurement of Microsoft 365 licenses
- » Setup of your individual cloud or hybrid solution
- » Support of the change process in the company
- » Training of the user teams
- » Technical support for your solution

For further information, follow this link!

Simply test Project Online

Just test Project Online yourself! Let us set up a cloud test environment for you. Our experts will accompany you during the testing phase.

<https://www.theprojectgroup.com/en/project-management-tools/project-online-trial>

FAST MICROSOFT PPM IMPLEMENTATION

Implementing **Microsoft PPM** can be more or less of a big project. You should consider a few essential points. These include the expectations of your stakeholders and a PMO as the central point of coordination. And in any case, you should take one step at a time. “Less is more” to begin with.

The first steps into your PPM system should be simple and lead to its general acceptance at the company. At a later stage, you can still detail and expand it further as required. TPG The Project Group has been supporting customers in the implementation of **Microsoft PPM** solutions for 20 years. We offer two approaches for this scenario: the standardized solution at a fixed price (TPG QuickStart) and the individual implementation (TPG 5-Phase Method). Find short descriptions of both below.

MICROSOFT PPM AT A FIXED PRICE: TPG QUICKSTART

TPG QuickStart is a ready-to-use solution based on **Microsoft PPM** – at a fixed price. This tool combines generic processes of project management and best practices from various industries. This makes it the optimal entry point for companies looking to implement a proven PPM solution in a quick and safe manner. At low cost, you can start using your own solution for project management in a matter of weeks.

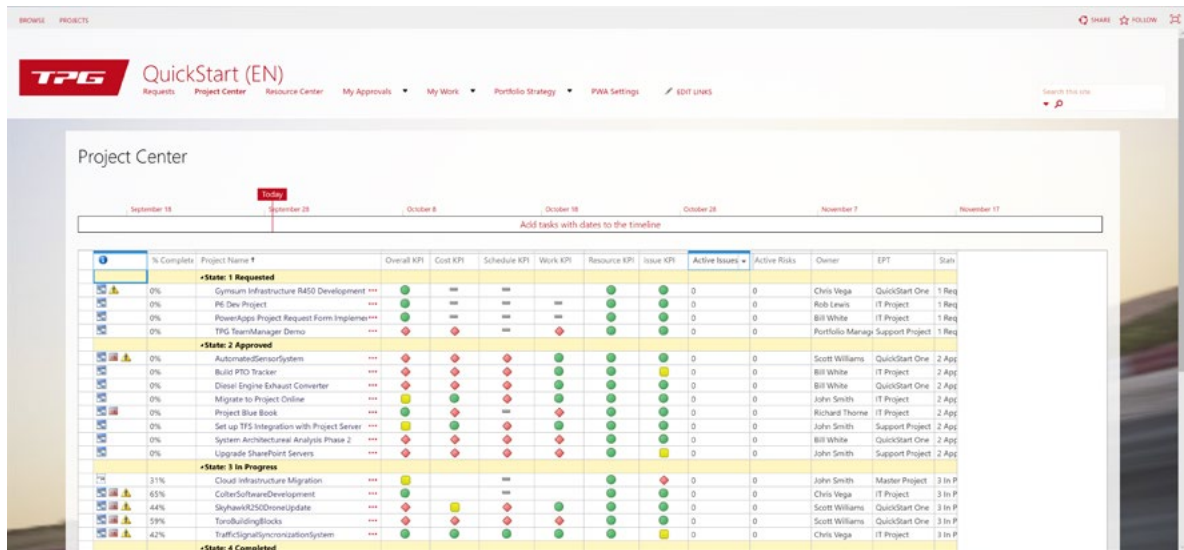


Figure: The transparent complete overview with traffic-light indicators in the TPG QuickStart Project Center

Your investment is future-proof. With Microsoft Project Server, there will be a local installation. In the case of Project Online, this occurs via the cloud. If required, the **Microsoft PPM** platform can be functionally extended as your company reaches an increased maturity level. It can also be integrated with other systems.

TPG QuickStart enables access to proven methods and functions of project management.

It employs:

- » A preconfigured security concept
- » A customer-specific project template
- » Views and reports
- » An enterprise resource pool which is aligned to your requirements
- » Lists of risks and open issues

PRECONFIGURED STANDARDS AND REPORTS

In addition to basic functions such as project creation, resource planning, time tracking and evaluation, the TPG QuickStart package in Project Online (or Project Server) includes field-tested traffic lights, pick lists, tables, filters and calendars. For improved planning and decision-making, the basic package also contains a number of meaningful and printable reports based on Excel, e.g. for portfolios, individual projects or resource utilization. Beyond that, TPG QuickStart includes a comprehensive set of valuable Power BI Reports (for more detail see **TPG Power BI ReportPack**).

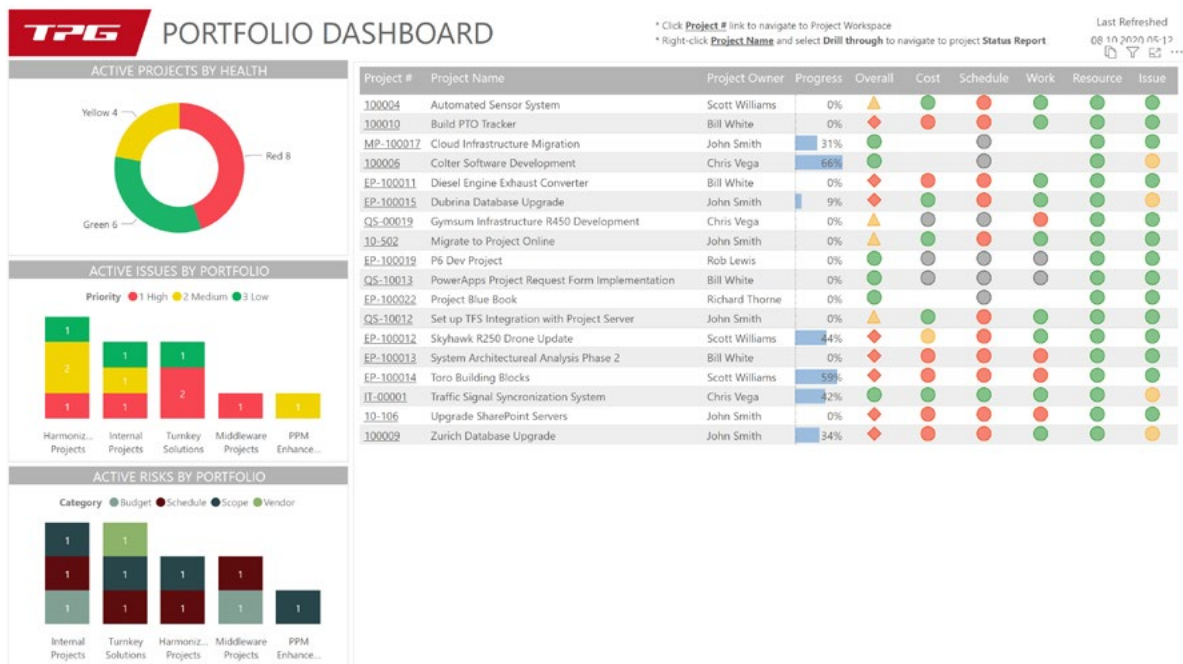


Figure: TPG QuickStart Power BI Standard Report: Portfolio dashboard for Project Online / Project Server

TPG QuickStart at a glance:

- » Fully configured solution for project management
- » Generic processes and best practices
- » Sector-independent
- » Workshop, implementation, training
- » Fully running solution within just a few weeks
- » Based on SharePoint / Project Server / Project Online
- » Realization at a fixed price

For more information: www.theprojectgroup.com/quickstart

INDIVIDUAL MICROSOFT PPM INTRODUCTION: THE TPG 5-PHASE METHOD

Unlike TPG QuickStart, the TPG 5-Phase Method is an approach for more complex PPM solutions. This is the right approach for your company, if you are aiming for an extended PPM solution with individual requirements from the beginning. For instance, you might wish to integrate other business systems. In the first step, this method ensures a general understanding of all stakeholder requirements through different workshops. The step-by-step implementation only happens after this stage has been completed.

www.theprojectgroup.com/5phasen