Die TPG®Migration Method

A Structured Approach to Achieve Your Goals – Quickly and Securely

Safe and reliable: The TPG Migration Method

Fast and Secure Migration of Existing Data to New Systems

Version 2016, the sixth generation of the Microsoft Project Server is now available. As of Version 2007, the Project Server functions have been seamlessly embedded in Microsoft SharePoint technology. Programmability and scalability lay the foundations for a genuinely stable and powerful infrastructure for multi-project and portfolio management (integrated since 2010).

The cloud-based solution Project Online has been available since Version 2013. It provides almost all capabilities of Project Server on premise, but licensing is very flexible.

With a new resource feature and practical capabilities such as several timelines, the current Version 2016 provides additional enhancements compared to previous versions.

MIGRATION – A CHALLENGING TASK

If you are already using an older generation of Microsoft Project Server (PPM) and are looking to benefit from the additional value of Project Server 2016 or Project Online, the migration of your PPM system will be necessary. This is a challenging task.
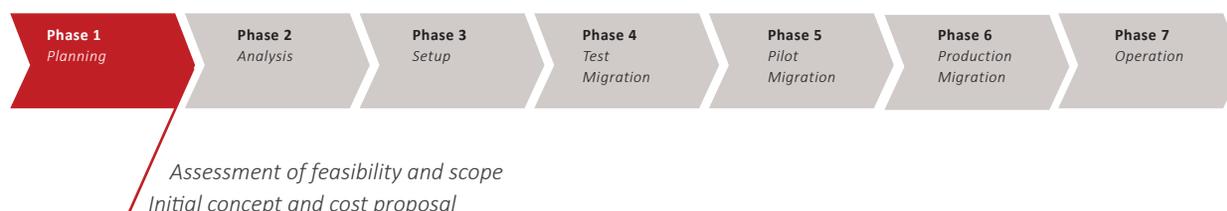
The migration must follow the right steps. This is the only way to ensure that the new system is available to use again quickly. It also ensures the quality of the transferred data.

TPG The Project Group is a reliable and very experienced partner for this task.

The TPG Migration Method was developed to ensure a structured implementation process. It provides you with the highest level of assurance that data quality will be maintained. In addition, the implementation of the migration will be most efficient. The method follows seven steps. It is based on the migration guidelines provided by Microsoft and amplified by our many years of experience.

This document describes the phases according to the TPG Migration Method.

PHASE 1: PLANNING

Phase 1 *Planning*	Phase 2 *Analysis*	Phase 3 *Setup*	Phase 4 *Test Migration*	Phase 5 *Pilot Migration*	Phase 6 *Production Migration*	Phase 7 *Operation*

Assessment of feasibility and scope
Initial concept and cost proposal

We start by meeting with you to review your existing systems and organization. The objective here is to assess the scope of the migration project and its feasibility. Once this is complete, we send you an initial concept that describes the work to be undertaken and a suggested schedule, as well as a cost proposal.

DIFFERENT INTERNATIONAL TPG CLIENTS FROM DIFFERENT VERTICALS

Airbus, GER/FRA	Grupo Leao, BRA	Lonza, GBR	Tecnisa, BRA
BAE Systems, GBR	Hamburg Port Autority, GER	MAN Diesel & Turbo, GER	Tyco Electronics, USA
Bosch (BSH), GER	Harman International, GER/USA	NATS, GBR	Vaillant Group, GER
DESY, GER	Helsinki City Transport, FIN	QinetiQ, GBR	Vorwerk, GER
Dimension Data, MEA	Hydro Quebec, CAN	Rentschler Biotechnologie, GER	Votorantim, BRA
Dürr, GER	Irish Rail, IRL	Rheinmetall, GER/CHE/CAN	
ELM, MEA	Johnson Controls, GER	Siemens Energy, GER	
E.ON, GER	Karl Storz, GER	Siemens Mobility, CHE	
Exxaro Coal Mines, MEA	Kemira, FIN	Stora Enso, FIN	
Goodyear, GER/USA	KFW, GER	Swisscom, CHE	

PHASE 2: ANALYSIS

Phase 1 Planning	Phase 2 Analysis	Phase 3 Setup	Phase 4 Test Migration	Phase 5 Pilot Migration	Phase 6 Production Migration	Phase 7 Operation

Workshops complete, pilot team set up
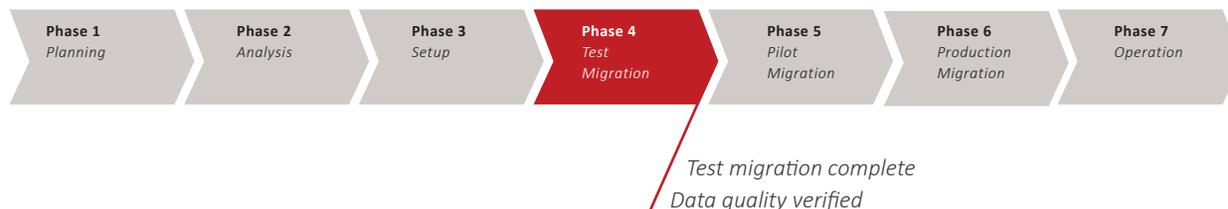*PPM system requirements defined*

We use this phase to learn more about how you work, your current projects, your SharePoint data and your Microsoft Project Server system. We also focus on obtaining detailed information about customizations and interfaces which enables us to define the best approach for migrating your Microsoft Project Server. We organize a workshop with the PMO and selected project managers to discuss your current Microsoft PPM system. Together, we determine how existing and new features will be used and decide on the pilot team for the migration. These activities provide TPG with the input needed to estimate the scope of work needed for system extensions, data cleaning, and training. We use this information to finalize our proposal.

PHASE 3: SYSTEM SETUP

Phase 1 Planning	Phase 2 Analysis	Phase 3 Setup	Phase 4 Test Migration	Phase 5 Pilot Migration	Phase 6 Production Migration	Phase 7 Operation

PPM System installed
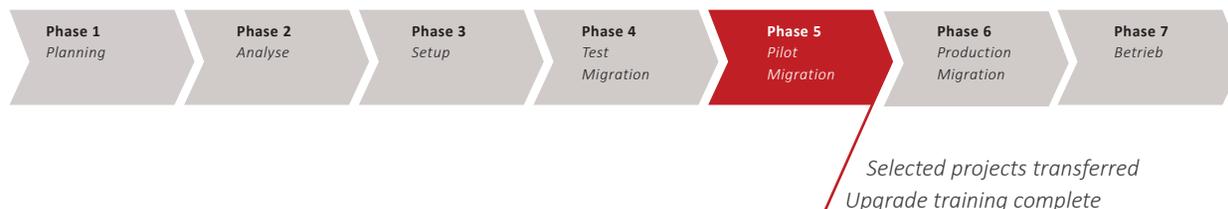*Installation packages ready*
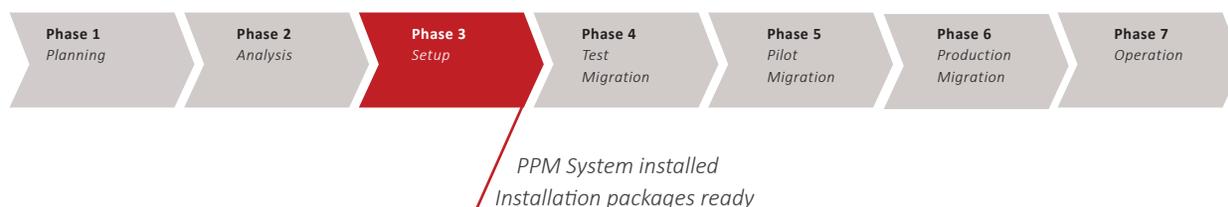
The migration environment needs to be installed before we can carry out the first test migration of your Microsoft Project Server system. We meet with your specialists to clarify the technical details needed to prepare the infrastructure, then carry out the installation. Alternatively, your administration team can install the new Microsoft PPM Version with our full support. Various installation packages will be prepared to facilitate the automatic roll-out of the client software and we'll help complete this as efficiently as possible.
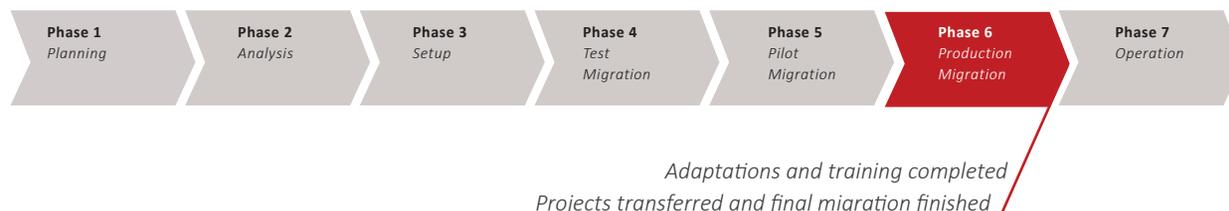
PHASE 4: TEST MIGRATION

Phase 1 Planning	Phase 2 Analysis	Phase 3 Setup	Phase 4 Test Migration	Phase 5 Pilot Migration	Phase 6 Production Migration	Phase 7 Operation

Test migration complete
Data quality verified

Every migration of a Microsoft Project Server is unique. For this reason, we start with a testmigration using your existing data. This helps us to identify any issues that may arise during the pilot or production migration. The test also gives us a good idea of how much work will be needed to clean the data after the migration. It also helps us estimate how long individual projects or Windows SharePoint pages will be unavailable for use. Nobody knows data better than the people who created them, so selected users should be asked to test random samples of the migrated data. TPG will supply the test concept to facilitate this.

PHASE 5: PILOT-MIGRATION

Phase 1 Planning	Phase 2 Analyse	Phase 3 Setup	Phase 4 Test Migration	Phase 5 Pilot Migration	Phase 6 Production Migration	Phase 7 Betrieb

Selected projects transferred
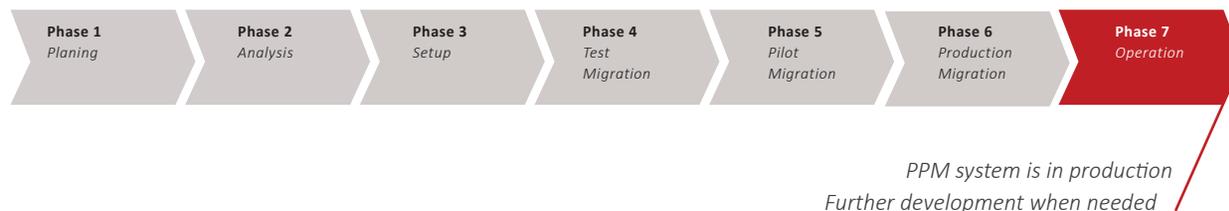*Upgrade training complete*

We use the insight gained from the previous test migration of your Microsoft Project Server system as a basis to help transfer selected projects into the new production system. Once the projects have been transferred, the pilot team will only work on them in the new system. We provide an upgrade training session that is tailored to the new system. This ensures that the pilot users can immediately start working with the system in a productive manner. If required, our specialists can adapt existing documents – such as manuals, training files, instruction books and others – to the new version of the Microsoft PPM system.

PHASE 6: PRODUCTION MIGRATION

| Phase 1 Planning | Phase 2 Analysis | Phase 3 Setup | Phase 4 Test Migration | Phase 5 Pilot Migration | Phase 6 Production Migration | Phase 7 Operation |

Adaptations and training completed
Projects transferred and final migration finished

When the pilot projects have been running for a while on the new Project Server, we assess the system and make any modifications necessary. Once this has been completed, the remaining projects can be ported from the old system into the new Microsoft PPM – either all at once or in groups, depending on how many there are and which ones are needed most. Next, further training is provided in a phased approach for employees who are not members of the pilot team. The migration of the Project Server is complete when the last project has been ported to the new PPM system. The old system can be used for a while as a read-only storage facility for non-migrated projects and sites. After that, it can be archived and turned off.

PHASE 7: OPERATION AND FURTHER DEVELOPMENT

| Phase 1 Planing | Phase 2 Analysis | Phase 3 Setup | Phase 4 Test Migration | Phase 5 Pilot Migration | Phase 6 Production Migration | Phase 7 Operation |

PPM system is in production
Further development when needed

Even after you have achieved your primary goal – the successful migration of your Microsoft Project Server – our specialists are always available for you. We provide several tailored products and solutions to assist you in the day-to-day operation of your system. More about future developments: Your PPM system now plays a valuable and important role in your company and will need to be adapted to the changing needs of its users. Whenever you need advice or support, TPG The Project Group is available to help.

TPG PROJEKT MANAGEMENT INCLUDED

With all projects TPG also provides typical project management services.
This is how we secure the quality of process and results. These TPG services include:

▸ deciding or support of decisions regarding content, schedules, changes etc.

▸ arrange project jour fixe meetings

▸ TPG internal coordination (schedules, project staff)

▸ coordination and consulting with the customer's project leader

▸ provide means and material from TPG

▸ preparation of the acceptance test

▸ documentation of all migration steps and actions

OPTIONAL TPG SERVICES

In the context of a migration TPG also offers additional services like:

▸ migration of customizations of the old system

▸ adoption of existing interfaces

▸ update of user manuals

▸ update of manuals regarding project management methodologies

▸ update of best practice documents

▸ update of documents within SharePoint list templates

▸ update of any other documents

OUR COMMON PROJECT – HOW THE CUSTOMER ASSISTS

During the project we need your active collaboration and support like this:

Project leader with authority to decide and manage for

▸ internal coordination (schedules, project staff)

▸ organizational arrangements and clearance

▸ provision of needed means and material, acceptance tests etc.

▸ deciding or pressing for decisions regarding content, changes etc.

Attending PM and/or PMO workshops

▸ member of the responsible project management coordination team or PMO

▸ decision maker for the content to be migrated

▸ member of the pilot team (may overlap with the decision makers mentioned above)

▸ IT responsible person

Responsible and executing persons for

▸ revision or the source data base

▸ revision of the target data base

▸ check and approval in regards of content and data quality on the target data base

▸ check and approval of the programming accomplishment and products

▸ check and approval in regards of content of documents

Technical contact person for

▸ system access (remote access)

▸ credential information

▸ further technical questions

Ein eigens für das Migrationsprojekt eingerichteter, temporärer Arbeitsplatz für TPG Experten und / oder ein Remote-Zugang auf Ihr System sind sinnvoll für die effiziente Durchführung.

www.theprojectgroup.com/migration

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