Microsoft Project 2013/Online

Alan Richardson, PMP, ACP

Bio

- Alan Richardson, PMP, ACP
  - Covenant Technology Partners
  - Project Manager
  - 24 years in U.S. and I.T.
  - Managed projects for dozens of companies, primarily St. Louis area.
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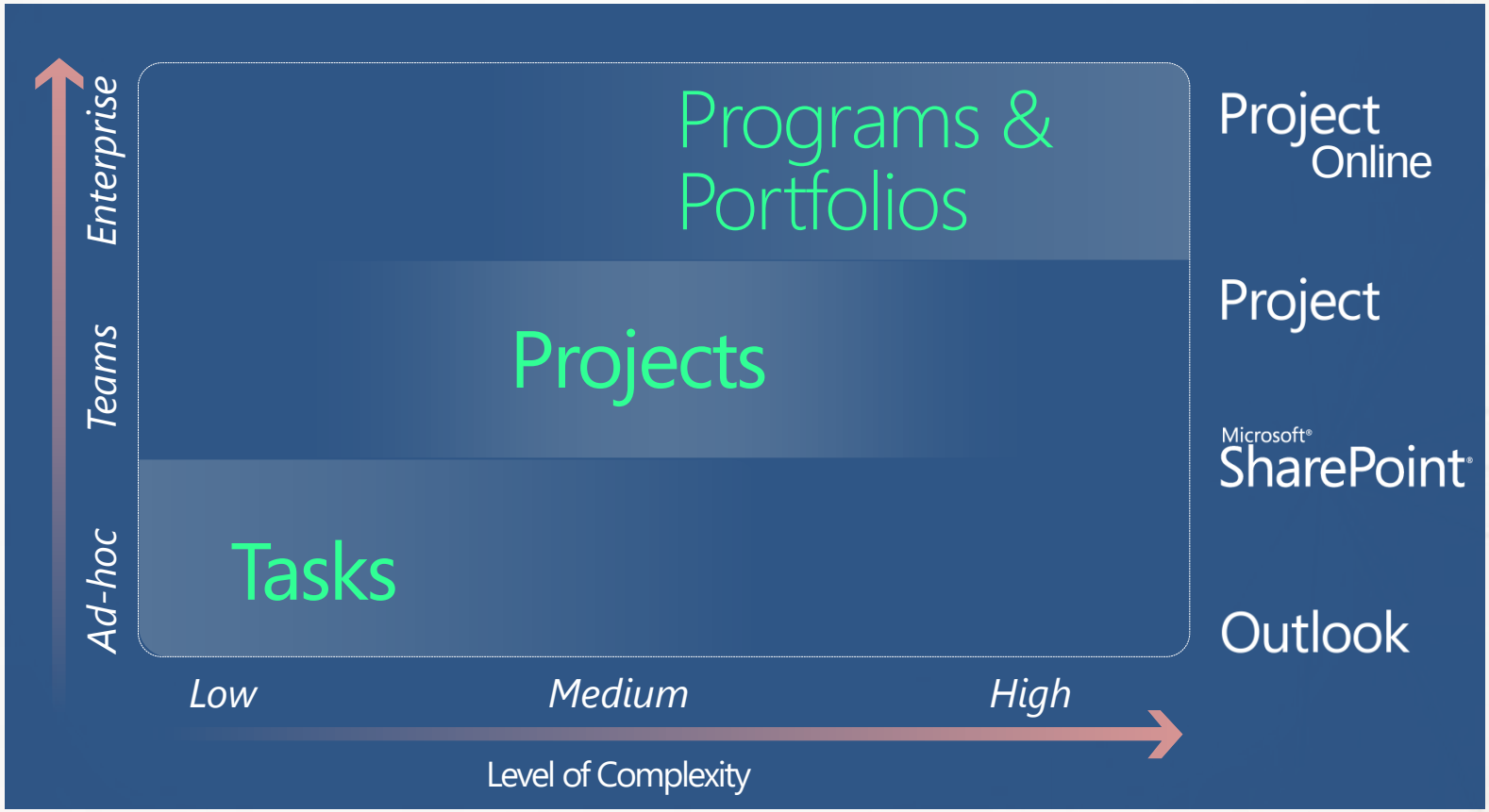
The big picture



1 – Task Management

- Small amount of work, small team
- Minimal scheduling needs
- Email-only approach leads to confusion
- Need one place to collaborate and coordinate
- Task-centric

RE: New Project - Message (HTML)

FILE MESSAGE

Fri 1/11/2013 1:20 PM

Alan Richardson

RE: New Project

To Alan Richardson

From: Alan Richardson
Sent: Friday, January 11, 2013 1:17 PM
To: Jeff, Sam, Julie, Eric, Prassad
Subject: RE: New Project

Has anyone start any of these tasks yet?

I'm having a hard time keeping track of the tasks – let alone who is working on them etc!

Alan

From: Julie
Sent: Friday, January 11, 2013 1:14 PM
To: Jeff, Sam, Julie, Eric, Prassad
Subject: RE: New Project

Also, we need to talk to the branches to get their manager name(s) and hours of operation - that data is not in the database today.

Julie

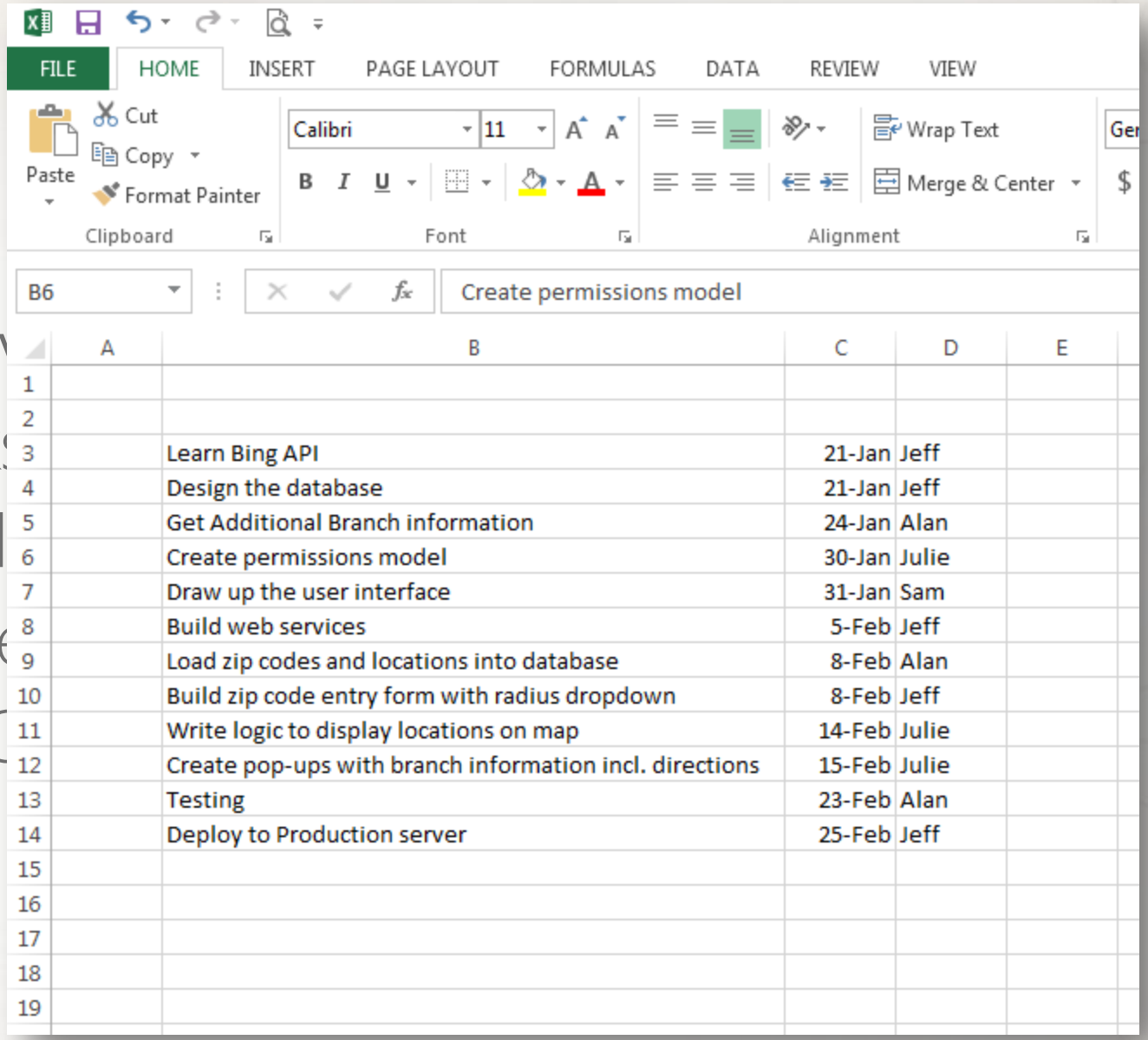
From: Sam
Sent: Friday, January 11, 2013 1:13 PM
To: Jeff, Sam, Julie, Eric, Prassad
Subject: RE: New Project

You didn't put anything in there for testing. Please add something for that.

Alan Richardson Conversation with Scott Weinstein

1 – Tas

- Team Mov
  - All tasks
  - Spread
  - Multiple
- Result = C



	A	B	C	D	E
1					
2					
3		Learn Bing API	21-Jan	Jeff	
4		Design the database	21-Jan	Jeff	
5		Get Additional Branch information	24-Jan	Alan	
6		Create permissions model	30-Jan	Julie	
7		Draw up the user interface	31-Jan	Sam	
8		Build web services	5-Feb	Jeff	
9		Load zip codes and locations into database	8-Feb	Alan	
10		Build zip code entry form with radius dropdown	8-Feb	Jeff	
11		Write logic to display locations on map	14-Feb	Julie	
12		Create pop-ups with branch information incl. directions	15-Feb	Julie	
13		Testing	23-Feb	Alan	
14		Deploy to Production server	25-Feb	Jeff	
15					
16					
17					
18					
19					

1 – Task Management

- Team Moves to SharePoint
  - Spreadsheet added to Project Site doc library
  - Uses co-authoring to allow concurrent updates
- **Result** = Less confusion, but information is limited and hidden

1 – Task Management

- Team Moves to SharePoint Tasks
  - Spreadsheet imported/pasted into Project Site
  - Team uses Task List to view/update
- Demo

1 – Task Management

One place for everything

Easily collaborate

Status at a glance

Task management for your team

2 – PM for Your Team

- Project Gets Bigger!
  - More tasks
  - More people
  - Scheduling more complex
- Demo

2 – PM For Your Team

Collaborate in SharePoint, manage in Project

Anticipate and solve problems

Create and share reports

Project management for your team

3 – PM for Your Organization

- Multiple Projects!
  - Need Portfolio visibility
- Demo

3 – PM for Your Organization

Flexible PPM

Visibility into all projects and work

Rich reporting at the portfolio level

Project management for your organization

Full Lifecycle

Create

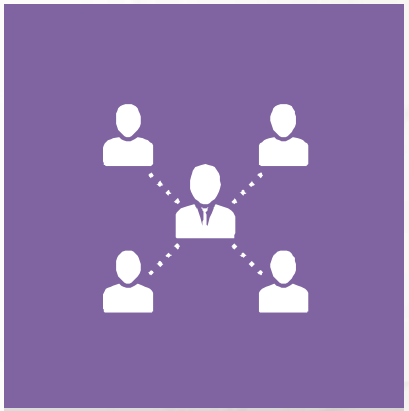
Demand Mgmt

Select

Portfolio Mgmt

Plan

Work Planning
Resource Mgmt



Manage

Collaboration
& Reporting
Time Mgmt

Project Online & On Prem

- 3 Options
  - Project Online
  - Project Pro for Office 365 (incl. desktop client subscription for up to 5 PCs)
  - Project Online with Project Pro for Office 365 (incl. everything)
- Same code-stream

Project Online Benefits

- No infrastructure maintenance (focus on delivery)
- Available on demand
- Available anywhere on any client (no vpn, no windows)
- Spin up Project Server is simple /user /month
- Near instantaneous streaming of the desktop apps
  - Click to Run - subscription installs for Project Online (5 per user)

PWA Improvements

- Mobile
  - Lightweight monitoring, scheduling and tasks mgmt
- Browser support same as SharePoint
- Exchange Server integration
  - Calendaring and tasks
- Baselines, timeline and autocalc in PWA
- UI simpler than Project Professional

Other Improvements

- SharePoint Task Lists
  - Anyone can interact with project plan easily
  - Consolidated Task List (sites, projects, personal, Outlook)
  - SharePoint tasks show in Outlook
- SharePoint Designer 2013 authored workflows
  - Visual workflow development w/o Visual Studio

Other Improvements

- Timesheets simplified
  - Filtered list of projects
  - Admin tasks next to project tasks
- Security simplified
  - Easily use SharePoint security groups
- BI/Reporting using oData
- Lync directly from Project Pro 2013

Migration to PS 2013

- Database attach method
  - No "in-place" method
- Project Professional 2013 (only) connects to (only) Project Server 2013
- 2007 -> 2010 -> 2013
- Databases consolidated
  - 4 DB's (Archived, Draft, Published, Report) -> 1 DB
- http://technet.microsoft.com/en-us/library/ff603507.aspx
- http://technet.microsoft.com/en-us/projectserver/ee198300.aspx

Migration to Project Online

- FluentPro Cloud Migrator Pro
- Migrates entire configuration
  - Custom Fields / Lookups / EPT / PDP / Views / Settings / Portfolio Analysis / Security
  - Resources and project schedules with values in all custom fields
- http://www.projectmigrator.com/