Microsoft®

Microsoft Enterprise Project Management 2010 Licensing Guide

Microsoft® **Project** 2010

Microsoft Project 2010 Licensing

Microsoft® Project 2010 is a family of products that provide a range of functionality depending on organizational needs. Project 2010 allows organizations to ease into the correct level of maturity for their work management needs.
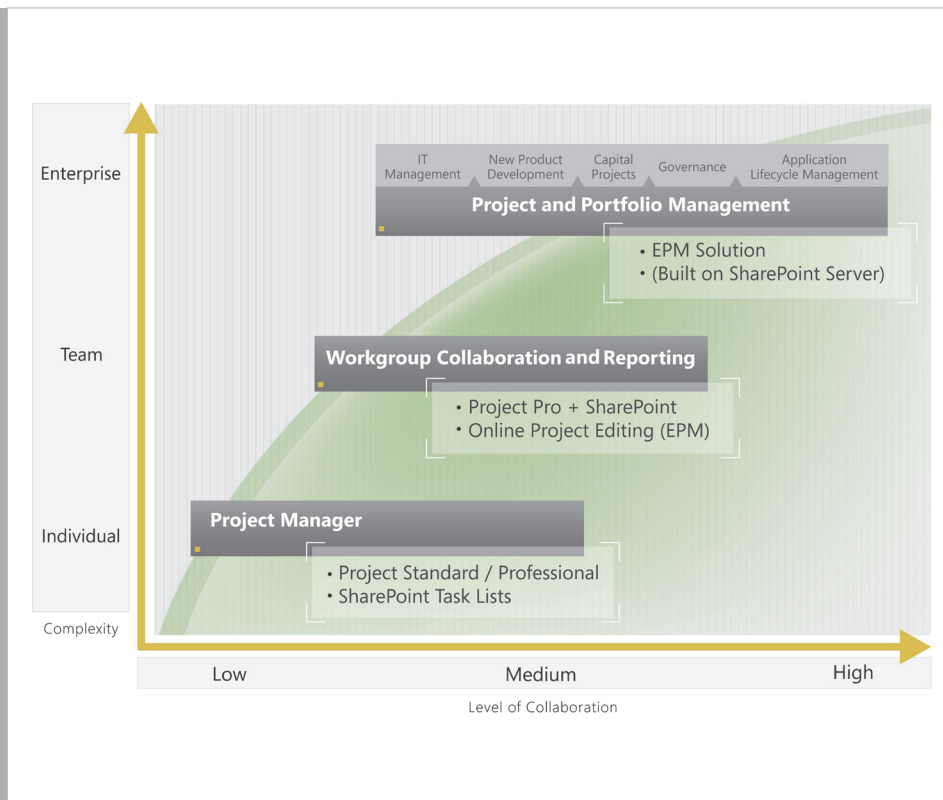
The Project 2010 family consists of desktop and server products. Microsoft Project Standard 2010 and Microsoft Project Professional 2010 are both desktop editions. The flagship of the Enterprise Project Management solution is Microsoft Project Server 2010.

This guide will help you understand the relationship among the various Project editions, their interdependencies, and requirements. The goal of this guide is to help identify the correct technologies to put in place in order to have an effective project management system.

Work Management Solutions for Individuals, Teams, and the Enterprise

For Enterprise Project Management (EPM) solutions to be effective, they need to provide organizations of different sizes and varying EPM maturity levels with the appropriate tools to help ensure that teams can collaborate to deliver projects successfully. A small or mid-size organization may have different EPM requirements as compared to a multinational organization.

Organizations can achieve incremental gains in collaboration capabilities by using products within the Microsoft Project and Microsoft SharePoint® families. Large and small organizations alike can deploy the EPM solution to successfully support project management.

Individual Project Management

Microsoft Project Standard and Project Professional (used as standalone applications) and SharePoint task lists can help full-time and part-time project managers to create and track schedules that enable project teams to complete their work on time and within budget.

Workgroup Collaboration and Reporting

By connecting Project Professional to Microsoft Windows® SharePoint Foundation (or Microsoft SharePoint Server), or by using online project editing in Project Web App, teams can more effectively collaborate and successfully complete project work.
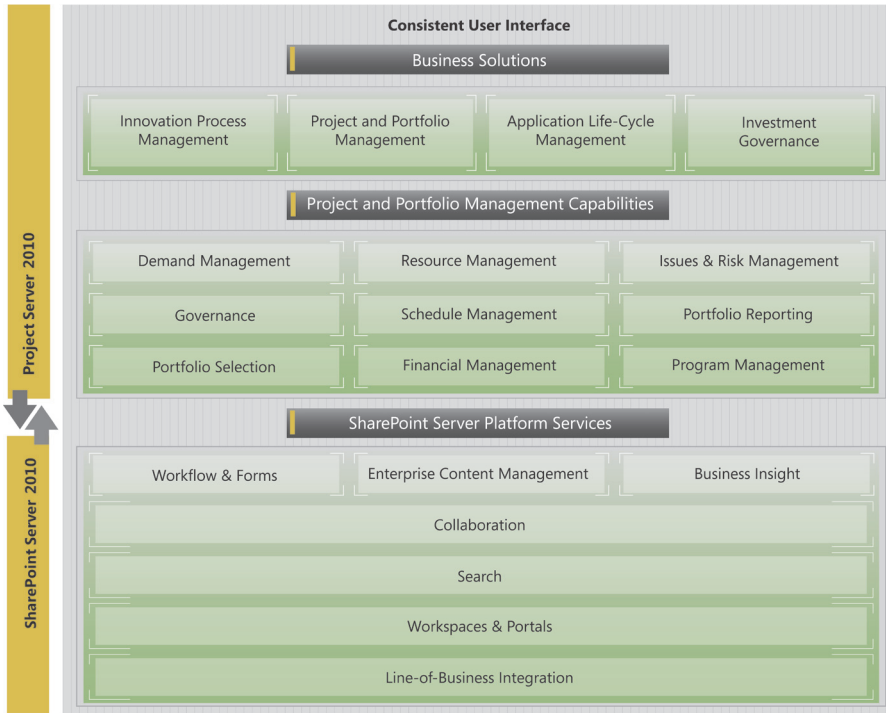
Unified Project and Portfolio Management

In the latest version of the Microsoft EPM solution, best-in-class portfolio management techniques are included in Microsoft Project Server 2010 to provide a single server that has end-to-end EPM capabilities.

EPM Solution Architecture

Project Server 2010 is built on top of SharePoint Server 2010. This architecture enables customers and partners to take advantage of the SharePoint Platform Services coupled with the project management capabilities of the EPM solution to build powerful business solutions such as EPM, innovation process management, investment governance, and others. These solutions have the following features and capabilities:

Consistent User Interface

Business Solutions

| Innovation Process Management | Project and Portfolio Management | Application Life-Cycle Management | Investment Governance |

Project and Portfolio Management Capabilities

Demand Management	Resource Management	Issues & Risk Management
Governance	Schedule Management	Portfolio Reporting
Portfolio Selection	Financial Management	Program Management

SharePoint Server Platform Services

| Workflow & Forms | Enterprise Content Management | Business Insight |

Collaboration

Search

Workspaces & Portals

Line-of-Business Integration

Project Server 2010

SharePoint Server 2010

- **Consistent server interface:** Provide the same experience whether people are within SharePoint Server sites or in Project Web App

- **Reporting:** Quickly create a variety of reports, define key performance indicators (KPIs), and configure powerful dashboards

- **Governance workflow:** Use workflows to better track the completion of key deliverables

- **Enterprise search:** Use improved search to find people, documents, project artifacts, and other project information

- **Social computing:** Enable more effective EPM team collaboration and communication with wikis, blogs, and people and expertise search capabilities

- **Portals:** Create portals to enhance reporting or centralize demand management

- **Line-of-business integration:** Streamline the use of multiple business applications, systems, and servers for seamless operation and provide a unified view of work management information

Project Server capabilities inherited from SharePoint

- Report Center
- Excel Services
- Advanced charting and KPIs
- Workflow components

Benefits to using Project Server in addition to Project Professional
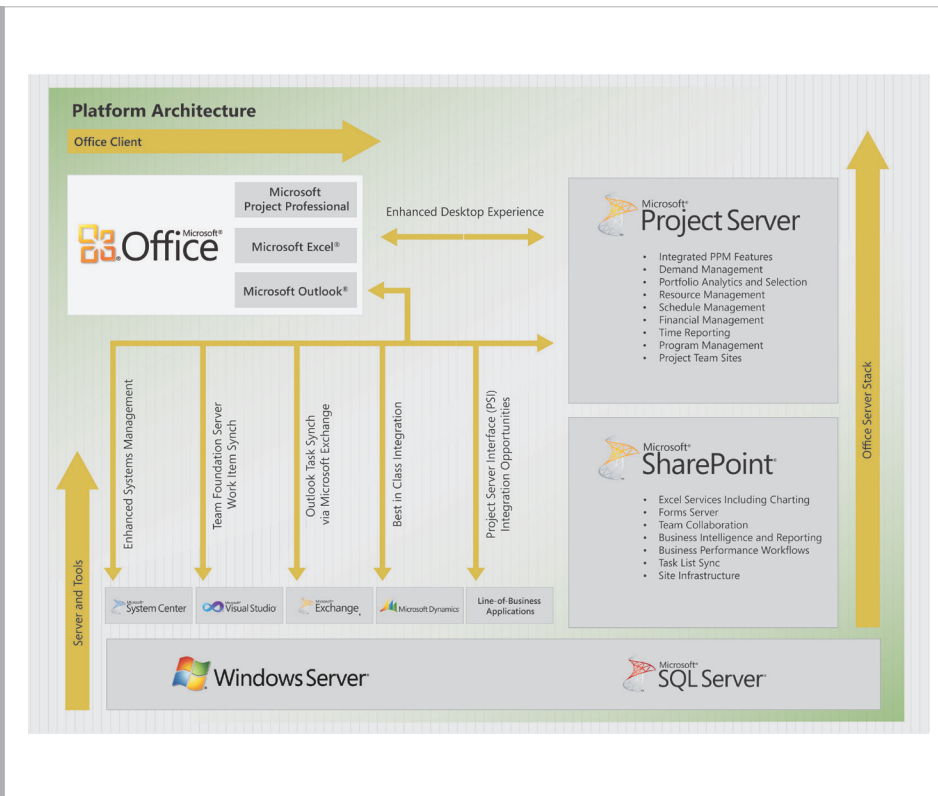
- Scorecards for in-depth business insight
- Greatly expanded reporting options
- Enhanced project and document workflow
- Gain leverage from full SharePoint collaboration capabilities

Platform Architecture

Project Server 2010 integrates Project and Portfolio Management features and depends on Microsoft Windows Server® 2008 (or 2008 R2) x64 editions, Microsoft SQL Server® 2005 (or 2008) x64 editions, and Microsoft SharePoint Server 2010. There are many opportunities to take advantage of the Microsoft platform architecture for Project Server 2010.

Platform Architecture

- Office Client
  - Microsoft Office
  - Microsoft Project Professional
  - Microsoft Excel®
  - Microsoft Outlook®
  - Enhanced Desktop Experience

- Microsoft Project Server
  - Integrated PPM Features
  - Demand Management
  - Portfolio Analytics and Selection
  - Resource Management
  - Schedule Management
  - Financial Management
  - Time Reporting
  - Program Management
  - Project Team Sites

- Microsoft SharePoint
  - Excel Services Including Charting
  - Forms Server
  - Team Collaboration
  - Business Intelligence and Reporting
  - Business Performance Workflows
  - Task List Sync
  - Site Infrastructure

- Enhanced Systems Management
- Team Foundation Server Work Item Synch
- Outlook Task Synch via Microsoft Exchange
- Best in Class Integration
- Project Server Interface (PSI) Integration Opportunities

- Server and Tools
  - Microsoft System Center
  - Microsoft Visual Studio
  - Microsoft Exchange
  - Microsoft Dynamics
  - Line-of-Business Applications

- Office Server Stack

- Windows Server
- SQL Server

- In SharePoint Server 2010, use application features such as Excel Services, Report Center, workflow, task lists, and team sites.

- Design, build, and modify existing workflows through Microsoft Visual Studio®. Model additional workflows from those delivered with Project Server 2010.

- Use project and portfolio performance data from Project Server 2010 as a source for performance reporting and dashboard content.

- In Microsoft Visual Studio Team Foundation Server, synchronize project tasks with Project Server 2010 tasks.

- Enable integration with line-of-business systems with the Project Server interface and system management platforms such as Microsoft System Center.

Roles in an EPM Implementation

The following table presents several roles in typical project management scenarios. The suggested client interfaces are the preferred interfaces to accomplish tasks for that role, though users are free to use any number of client interfaces (including alternate interfaces such as Microsoft Excel) to access Project data.

Roles	Responsibilities	Suggested Client Interfaces
Team Member	Perform day-to-day activities such as work on tasks, timesheet submissions, status communication, and participation in project collaboration processes. Team Member is the default role for everyone in the resource pool.	Project Web App
Project Manager	Create and maintain project plans, schedule tasks, manage resources, track and analyze progress, and communicate project status.	Project Standard 2010 or Project Professional 2010 with Project Web App
Resource Manager	View resource capacity and utilization information, and allocate resources based on different criteria.	Project Professional 2010 with Project Web App
Executive	View the collective status of projects and portfolios with dashboards, drill-through reports, and KPIs.	Project Web App
Project Management Office (PMO)	Manage workflows, templates, permissions, and other settings (with access to all Project Manager, Resource Manager, and Executive capabilities).	Project Professional 2010 with Project Web App
Portfolio Analyst	Help build, select, and manage projects that align with business objectives.	Project Web App
Administrator	Deploy, configure, and maintain the EPM solution (with access to all EPM capabilities).	Project Web App and Project Professional 2010

Capabilities by Product Types

The following table shows the main capabilities enabled by different product types.

Capabilities	Products Required			
	Project Standard 2010	Project Professional 2010	Project Professional 2010 with SharePoint Foundation 2010	Project Server 2010 with SharePoint Server 2010
Simple navigation: Make every action easier with graphical menus and an intuitive experience	■	■	■	■
Timeline: Create timelines more easily with a clear view of tasks, milestones, and phases	■	■	■	■
Flexible scheduling: Reduce the complexity of viewing and updating schedules with the ability to choose the level of detail	■	■	■	■
Resource management: Create the right mix of resources visually by using drag-and-drop editing		■	■	■
Business intelligence: Make project information available to more people by creating reports and powerful dashboards		■	■	■
Synchronize project information with SharePoint and Project Server 2010: Enhance team collaboration by sharing project information more efficiently; enable round-trip synchronization			■	■
Document management: Control document review and approval through workflow			■	■
Project and resource collaboration: Create stronger team connections by using Microsoft Project Server 2010 for Enterprise Project Management				■
Enterprise search: Find people and locate relevant project data more easily				■
Web-based project editing and calculations: Build schedules online and conveniently update basic project data from virtually anywhere				■
Time and task progress: Save time and unify task status updates and timesheet submissions by enabling single-entry mode				■
Unified project and portfolio management (PPM): Provide a single server with end-to-end PPM capabilities				■
Portfolio selection: Select project portfolios that align with business strategy				■

Solution Environment

Servers and Clients in the EPM Solution

The EPM solution has two client front ends: Project Web Access and Project Professional. All roles can use Project Web Access. Project Managers also use Project Professional for detailed project planning and tracking, and to publish updates to Project Server. For licensing purposes, everyone who uses either front end needs a Project Server Client Access License (CAL). Project Professional includes a Project Server CAL.

Dependencies

The EPM solution provides work management capabilities on top of the Microsoft core infrastructure, which many organizations already have in place. The core infrastructure consists of Windows Server 2008 (or 2008 R2) x64 editions, SQL Server 2005 (or 2008) x64 editions, and Microsoft SharePoint Server 2010.

Enhanced Tools

Microsoft Project Server 2010 is built on top of Microsoft SharePoint Server 2010, which in combination enable powerful business collaboration platform services and structured execution capabilities to provide flexible work management solutions such as the following:

- Enterprise search
- My Sites and social computing
- Portals
- Business intelligence and reporting
- Customizable business processes and forms
- Enterprise content management
- Line-of-business systems integration

These features enable easier access to colleagues, enhance collaboration, and reduce time needed to find information.

Microsoft Project 2010 Edition Comparison

With significant updates and visual enhancements, Project Standard 2010 delivers powerful, visually enhanced ways to manage a wide range of projects and programs. Project Professional 2010 includes all the capabilities of Project Standard 2010 plus more features such as at-a-glance resource management and team collaboration tools using Microsoft SharePoint Foundation 2010. When using Project Professional 2010, organizations can realize the results of unified project and portfolio management by adding Microsoft Project Server 2010.

Which version of Project is right for your organization?

	Microsoft Project Standard 2010	Microsoft Project Professional 2010
Simplified Navigation		
Increase productivity with the Ribbon, a tab interface to quickly find and use Project features and controls.	New	New
Quickly learn about features with Tool Tips, Status bar messages and context-sensitive online Help.	New	New
Personalize the Ribbon by adding or removing actions on the tabs and creating personal galleries.	New	New
Enter and find project information with the same ease as in Excel by using AutoComplete, text wrap, flexible data types and check-box column filters.	New	New
Use Ribbon formatting commands to easily customize the look and feel of Gantt charts and tasks to help capture your audience's attention.	New	New
Quickly access tools, templates, and program options for Project by using Microsoft Office Backstage™ view.	New	New
Timeline View		
Selectively place phases, milestones, and key tasks in the new Timeline view to provide a high-level summary of your project schedule.	New	New
Illustrate key milestones or phases with new visual effects and colors. Zoom and pan to show different dates and scenarios.	New	New
Copy and edit the graphical timeline in Office applications (such as Microsoft Word, PowerPoint®, and Outlook) to communicate project status quickly.	New	New
User-Controlled Scheduling		
Combine the power of Project scheduling engine with the flexibility to choose between manually scheduling tasks with explicit dates and durations or calculated dates.	New	New
Quickly plan projects top-down with manually scheduled summary tasks.	New	New
Create tasks that have placeholder information such as "TBD" and enter dates and duration later when details are known.	New	New
Compare manually entered project phase duration and start/finish estimates with bottom-up schedule details.	New	New
Perform what-if analysis and review impacts on schedule and resources using active/inactive tasks.		New
At-a-Glance Resource Management		
Drag and drop resources in an interactive resource view to simplify complex scenarios.		New
Quickly spot unassigned or unscheduled work and overload conditions. Drag and drop assignment changes to relieve overload.		New
Be alerted to potential scheduling concerns with visual cues and use Task Inspector warning and suggestion dialog boxes to resolve conflicts.	New	New
Take corrective action such as leveling over-allocated resources on task-by-task basis.	Improved	Improved
Collaboration		
Develop schedules collaboratively by copying and pasting schedule details using Office applications (such as Outlook, Word, and Excel) with outline levels and formatting maintained.	New	New
Save a project schedule to a SharePoint site to collaborate with others.*	Improved	Improved
Publish a project schedule to a SharePoint task list, receive task updates from resources, and the two are automatically synchronized.*		New
With Project Server 2010, gain control across all types of work, improve project selection and strategic alignment, maximize resource utilization, and visualize performance in powerful dashboards. **		Improved
64-bit compatibility provides performance improvements to enable creating large and complex master projects.	New	New

Key   ● Improved   ⊛ New

Software Dependencies

Product	Project Standard 2010	Project Professional 2010	Project Server 2010
Client Access License Requirements	CALs not required nor included	Standalone: CALs not required If connecting to SharePoint Foundation 2010, users must be properly licensed for Windows Server. If connecting to Project Server: • Project Professional includes the required Project Server CAL • SharePoint Standard CAL required • SharePoint Enterprise CAL required • SQL Server CAL required • Windows Server CAL required	• Project Server CAL required • SharePoint Standard CAL required • SharePoint Enterprise CAL required • SQL Server CAL required • Windows Server CAL required
Dependencies	• Microsoft Office (2007 or later) recommended • Microsoft Office Excel 2007 or later required for report editing	• Microsoft Office (2007 or later) recommended • Office Excel 2007 or later required for report editing	• Windows Server 2008 (or 2008 R2) x64 edition • SQL Server 2005 or 2008 x64 edition • Microsoft SharePoint Server 2010 • Microsoft Office (2007 or later) recommended • Office Excel 2007 or later required for report editing

Software Assurance

As with all enterprise-class software, Microsoft recommends the use of Software Assurance (SA) as part of a properly maintained software environment. SA helps ensure the availability of advancing software releases. Without SA, customers must repurchase software in order to advance to a new release. SA helps reduce initial costs and forecast annual software budget requirements.

Microsoft Volume Licensing programs offer SA, which provides new version rights to software releases. In addition to helping budget for technology upgrades, SA provides access to the security, reliability, and productivity advances of the latest Microsoft programs. SA also helps organizations get the most value from their software investment through several key benefits:

- **Manageability:** All SA benefits are covered by the same even payments, so provisioning the information worker infrastructure is easy to budget, predictable, and simpler to administer.

- **Value:** SA offers a set of organizational benefits that help maximize the value of desktop investment. Individuals in the organization benefit from the software and training they need to improve their ability to use information to positively impact the business.

- **Productivity:** Productivity is a key element of SA. The organization has access to the latest technology when needed, and can choose to spread payments throughout the year.

- **Support:** The organization has access to Microsoft support professionals, resources, and tools to help IT staff efficiently deploy software, as well as problem resolution support to help keep business systems running.

- **Tools:** The organization can deploy software efficiently, monitor errors, and access Microsoft Windows source code.

- **Training:** Everyone can realize greater efficiency with access to many levels of training in instructor-led courses and e-learning, both of which give employees the flexibility to learn at their own pace. Employees get up to speed quickly on new products, and IT professionals keep up to date with the latest technical information. Employees who are educated with the latest knowledge are more productive and have a business edge, and IT staff members can reduce the time they spend on help desk calls and end-user training. End users benefit from online training, which helps them to work smarter with less support impact.

Online and Hosted Scenarios

Today, customers can choose to deploy the EPM solution on premises or by using partner-hosted software-plus-services offerings to effectively manage their project portfolios and drive team collaboration.

Hosted EPM services allow your organization to roll out solutions faster with high reliability, performance, and security. Hosted solutions can be cost effective, retain flexibility, and provide secure channels to protect sensitive data, while allowing a service provider to manage the environment and its configuration.

See http://www.microsoft.com/project for the latest information in online options.

Conclusion

Microsoft Project 2010 builds the foundation for EPM with flexible work management solutions and the right collaboration tools for occasional and professional project managers. Project 2010 includes a pathway to more advanced Project and Portfolio Management capabilities as business needs evolve. The Microsoft Project family of products consists of Microsoft Project Standard 2010, Microsoft Project Professional 2010, and Microsoft Project Server 2010. Project 2010 offers significant functionality in these four areas:

- Unified Project and Portfolio Management

- Simple and intuitive user experience

- Enhanced collaboration and reporting

- Scalable and connected platform

Project Server derives significant functionality from SharePoint Server and SQL Server, and therefore requires licensing of those technologies in addition to the Project Server and desktop components. In doing so, organizations receive significant benefits from their Project and Portfolio Management investments.

The proper licensing of EPM software can provide significant benefits for organizations looking to enhance their work management experience. Microsoft provides scalable purchasing options through its Volume Licensing programs, then enhancing their purchases with SA.

For more information about licensing Project 2010, please visit http://www.microsoft.com/licensing or speak with your local Microsoft representative.

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