

Pragma Consultores



Project Online - Gestión de proyectos en la nube

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V1.0

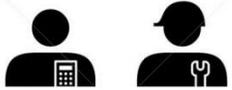




- Arquitectura de la nube
 - Windows Azure
- Modelo de servicio de Project Online
- Principales funcionalidades de Project Online
- Más productivo e integrado
 - Fácil administración
- Modelado de procedimientos



Sobre esta charla



Para público **con o sin experiencia en herramientas de gestión de proyectos**



Veremos las capacidades y beneficios de **Project Online**



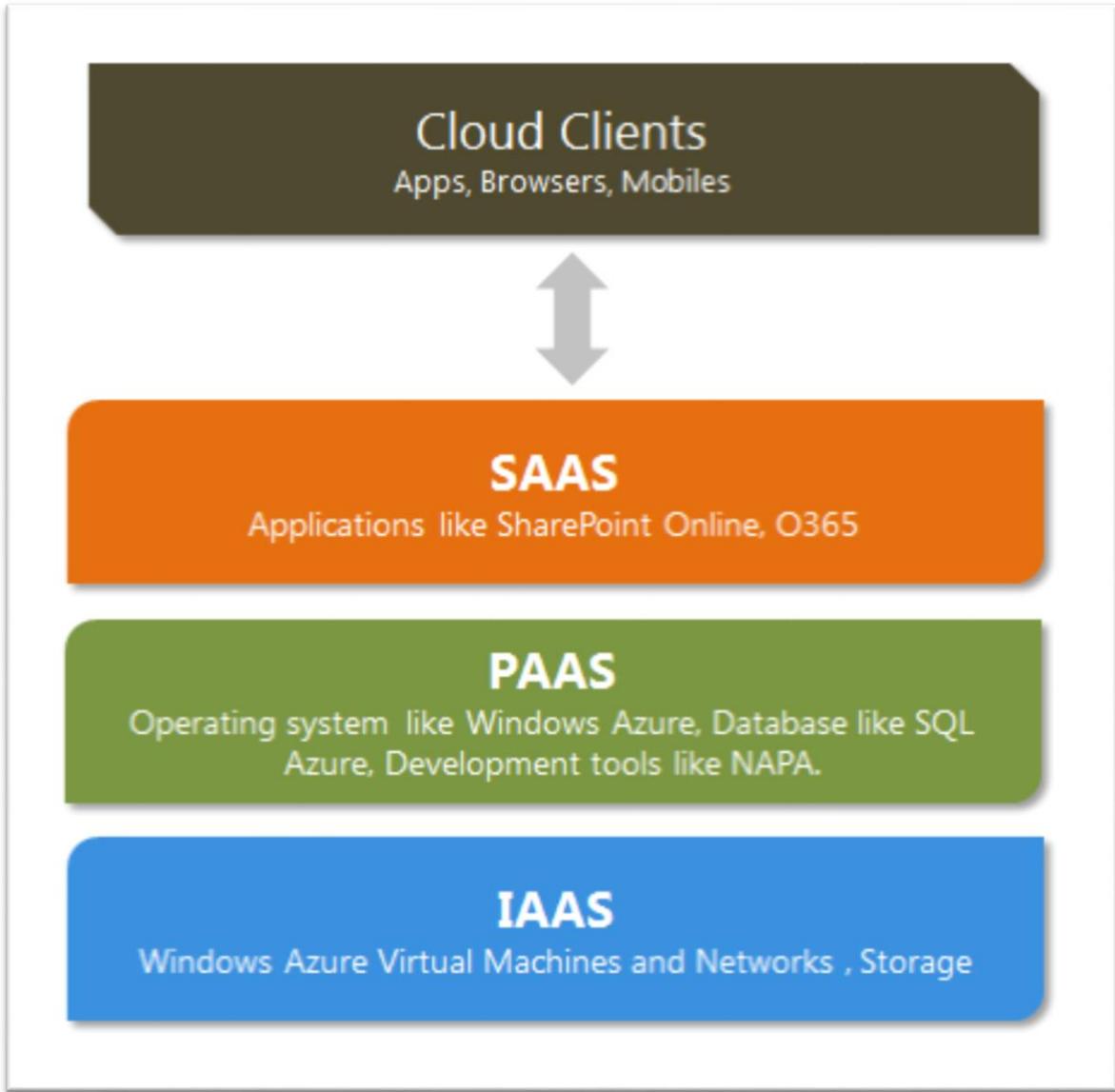
Anunciaremos como se puede modelar un procedimiento de gestión de proyectos



Apuntamos a **despejar dudas**



Arquitectura de la nube – Windows Azure





Modelo de servicios de Project Online



- **Modelo de suscripción:**
 - Se contrata independientemente y se integra a las características de Office 365, ej.: Lync Online.
- **Puedo integrar con usuarios de mi organización?**
 - Si. A través de AD FS (Active Directory Federation Services), disponible en Office 365
- **Tengo control sobre la infraestructura, ej.: la base de datos de reporting?**
 - No. Todas las capacidades se ofrecen como servicios. La infraestructura es controlada y administrada en datacenters de Microsoft.





IT Simplificado: Baja barrera de entrada para PMO y equipos, con foco en la separación de la gestión de la PMO, sin necesidad de asistencia de IT.

Confiabilidad: Uptime de 99.9% respaldado por garantía económica.

Seguridad de datos: Estrictas políticas de confidencialidad de datos privados.

Updates: Periódicos, automáticos, transparentes.

Backup: Procesos de backup y disaster-recovery continuos, soportados por redundancia global..

Performance: Scripts preventivos de ejecución continua a nivel servicios y datos, para prevenir errores y mejorar performance.

Active Directory: Capacidad de integración para autenticación de usuarios.

Accesibilidad global: Potenciando el uso en dispositivos portables





- **Basado en tecnología SharePoint 2013 y Office 365:**
 - Soporte Full HTML5, compatible con los principales navegadores del mercado
 - Soporte CCS3, Scripting avanzado
- **COSM: Client-Side Object Model**
 - Microsoft .NET COSM
 - Microsoft Silverlight COSM
 - Windows Phone 8 COSM
 - Javascript (JSOM)
 - OData sobre REST

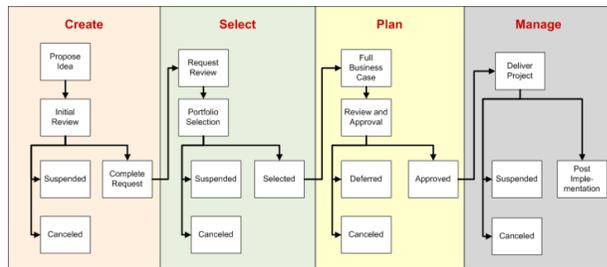


Project Online

Principales funcionalidades



Gestión de la demanda



Reporting



Gestión de cartera

Funded Project List

Priority Score	CPE Requirement	Project Name	Schedule Status	Capital Year	Allocated Budget	Spent	Blind	Proposed (WIP) Budget	Allocated (Approved) Budget	Spent	Proposed (Change) Budget	Target Completion Date
613	Information	General Information Request	On Track	2007	\$1,000,000	\$0,000,000	0%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	12/31/07
624	IT/IT	Virtual Site Backup (VSP)	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
625	Engineering	Planning Software	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	7/31/07
626	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
627	Finance	Implementation	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
628	Finance	Implementation	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
629	Finance	Implementation	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
630	Finance	Implementation	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
631	Finance	Implementation	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
632	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
633	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
634	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
635	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
636	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
637	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
638	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
639	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
640	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
641	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
642	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
643	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
644	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
645	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
646	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
647	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
648	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
649	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
650	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
651	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
652	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
653	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
654	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
655	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
656	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
657	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
658	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
659	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
660	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
661	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
662	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
663	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
664	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
665	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
666	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
667	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
668	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
669	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
670	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
671	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
672	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
673	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
674	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
675	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
676	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
677	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
678	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
679	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
680	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
681	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
682	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
683	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
684	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
685	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
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687	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
688	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
689	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
690	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
691	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000	\$0,000,000	1/31/08
692	IT/IT	IT/IT	At Risk	2007	\$1,000,000	\$1,000,000	100%	\$0,000,000	\$0,000,000	\$0,000,000		

Mas simple para el Project Manager



The screenshot shows the Project Web App interface in a Windows Internet Explorer browser window. The address bar shows the URL <http://servdesa250/PWA/default.aspx>. The page title is "Project Web App". The interface features a green header with the "SharePoint" logo and a "System Account" dropdown menu. Below the header is a "BROWSE" section with a search bar labeled "Search this site". The main content area is titled "Project Web App Home" and includes a sidebar with navigation links: "Projects", "Approvals", "Tasks", "Timesheet", "Resources", and "Reports". The main content area is divided into two sections: "Get Started with Project Web App" and "Track your work". The "Get Started" section contains six green tiles with icons and text: "Create or import projects.", "Use reports. Gain insight.", "Share your site.", "More features?", "Your site. Your brand.", and "Add lists, libraries, and other apps.". The "Track your work" section contains four green tiles with icons and text: "Projects", "Approvals: 0 Pending", "Tasks: 0 New", and "Reports".

Interfaz simplificada.

Mas simple para el Project Manager



Office 365 Newsfeed SkyDrive Sites Projects ...

BROWSE PROJECTS

New Open Add SharePoint Sites Build Team Resource Plan Project Permissions Check in My Projects Zoom In Zoom Out Scroll to Project Outline View: Summary No Filter No Group Add Project Add Tasks Export to Excel Print Subprojects Time with Date Change

Project Navigate Zoom Data Timeline Share Show/Hide Project Type

Projects

Approvals

Tasks

Timesheets

Resources

Strategy

Driver Library

Driver Prioritization

Portfolio Analyses

Reports

Dashboard

Server Settings

EDIT LINKS

Health Assessment Reporting Tool
3/12 - 9/5

Today

June, 2012 November, 2012 April, 2013 September, 2013 February

General Ledger (GL) currency update 1/12 - 8/13

Apparel ERP Upgrade 1/28 - 8/30

Acquisition Target Analysis 11/28 - 9/12

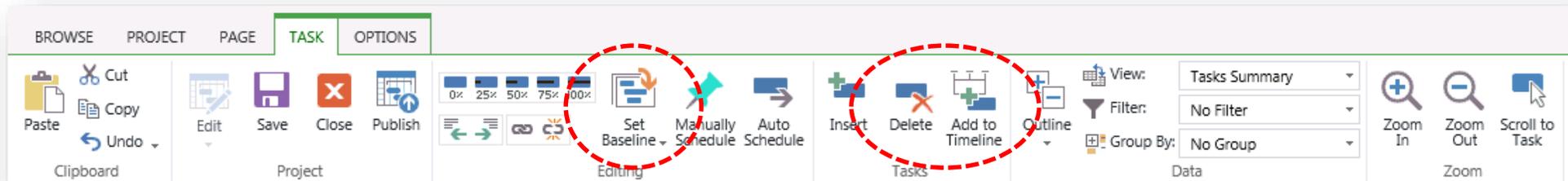
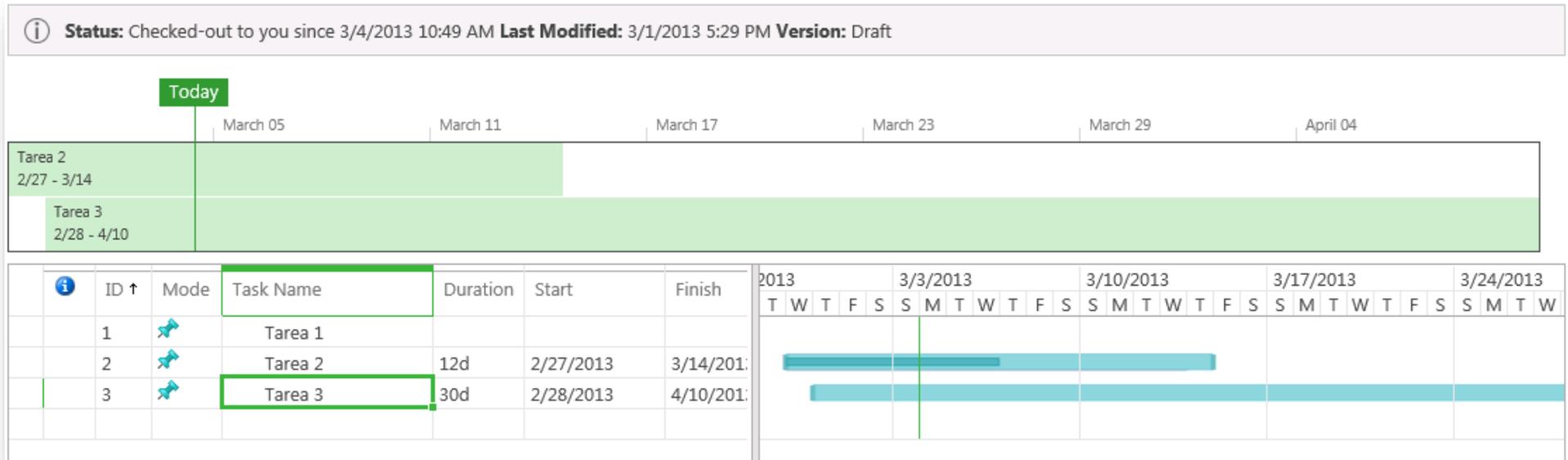
Payroll System Upgrade 7/24 - 2/21

Merger and Acquisition Deal... 2/28 - 7/9

Project Name ↑	Start	Finish	% C	12	January, 2013			April, 2013		July, 2013	
				Dec	Jan	Feb	Mar	Apr	May	Jun	Jul
Acquisition Target Analysis	11/28/2013	9/12/2014	0%								
Apparel ERP Upgrade	1/28/2013	8/30/2013	0%								
Audit Tracking Solution	1/21/2013	7/30/2013	0%								
Automated Software Installation	2/18/2013	6/5/2013	0%								
Catalog Publishing	1/30/2013	1/30/2014	0%								
CFO Campaign	6/25/2012	9/13/2013	0%								
Content Filtering Design and Implementation	2/20/2012	12/14/2012	33%								
Currency Translator Upgrade	2/4/2013	7/16/2013	0%								

Manejo de Timeline en la interfaz web

Mas simple para el Project Manager



Timeline a nivel Gantt por proyecto / Manejo de baseline desde la interfaz web



Share with Everyone -

Start a conversation

Newsfeed Everyone Activities ...

- ★ Sara Davis is now following #PMO.
- Sara Davis
Interesting whitepaper on #PMO setup best practices and tools.
👍 You like this.
July 11 Unlike Reply --
- ★ Sara Davis is now following Team Meeting Minutes.docx.
- ✓ Sara Davis replied to a post by Molly Dempsey.
 Sara Davis @Molly Dempsey I'll finish with it in a couple of minutes. I will let you know once it is checked-in.
July 11 Show conversation
- ★ Sara Davis is now following Payroll System Upgrade.
- ✓ Sara Davis replied to a post by Molly Dempsey.
 Sara Davis @Molly Dempsey It's ok, we'll bring you up to speed once you get here.
July 11 Show conversation
- ★ Sara Davis is now following Molly Dempsey.
- ★ Sara Davis is now following Robin Counts.
- ★ Sara Davis is now following Health Assessment Project Status Stakeholder Report.pptx.

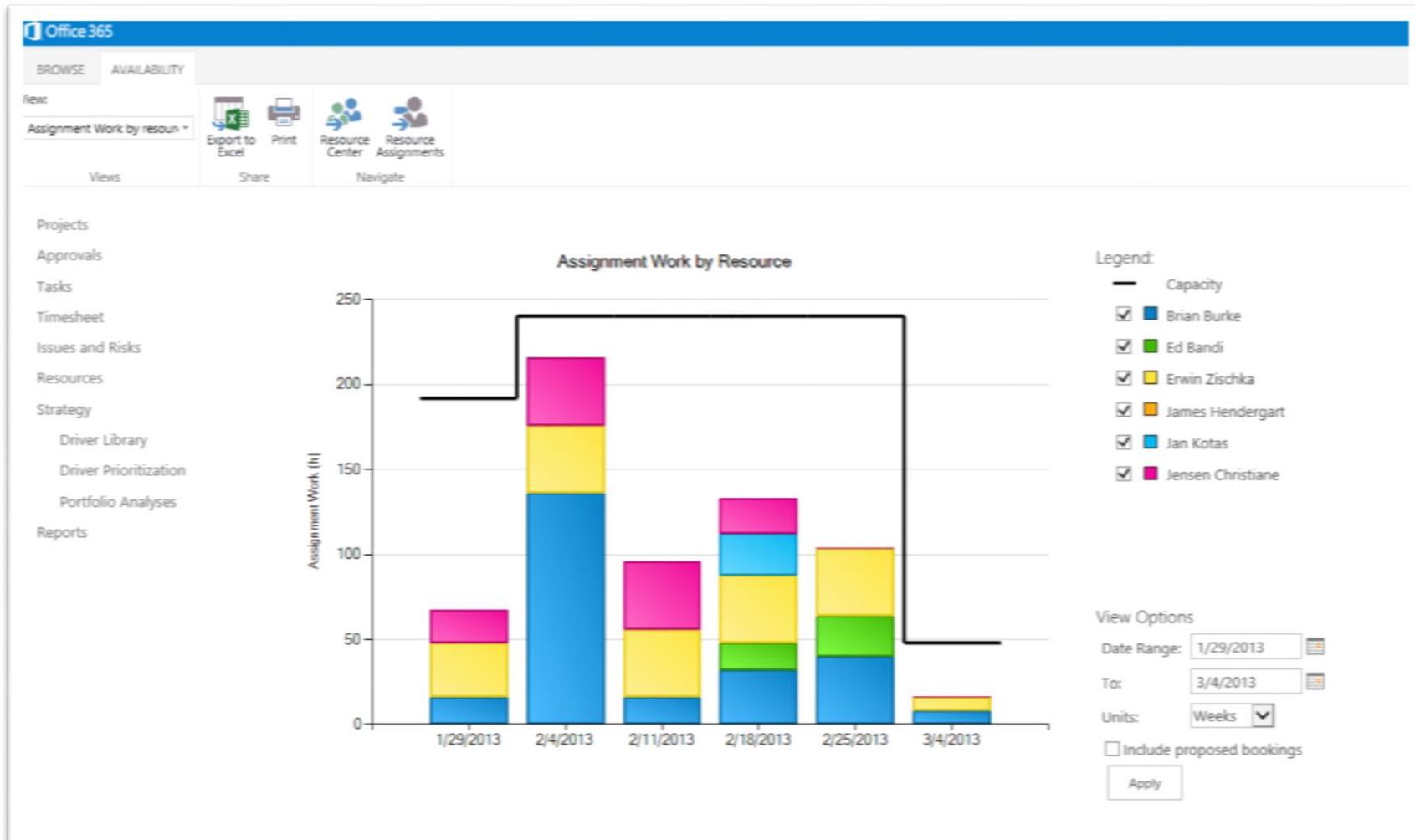


BROWSE | **TASKS**

View: My Assignments
 Filter: No Filter
 Group By: Project

- Projects
- Approvals
- Tasks
- Timesheet
- Issues and Risks
- Resources
- Status Reports
- Strategy
- Driver Library

		Task Name	Start ↑	Finish	Remain	% Wor	Period Total
		▶ Planning Window: In Progress for Curr	4/2/2014	5/1/2014	204h		
		▶ Project Name: Ejemplo	4/2/2014	5/1/2014	204h		
<input type="checkbox"/>		Tarea 1	4/2/2014	4/11/2014	64h	0%	
<input checked="" type="checkbox"/>		Tarea 5	4/11/2014	4/24/2014	68h	15%	4h
<input type="checkbox"/>		Tarea 3	4/21/2014	5/1/2014	72h	0%	



Project Online – Análisis de portfolio



Office 365 | Outlook | Calendar | People | Newsfeed | SkyDrive | Sites | Admin

Project Online

Cost Constraint Analysis: 2013 Annual Portfolio Selection Analysis

Metrics

Cost Limits	Modify
Total Cost	\$7,860,000.00
Totals	Modify
Projects Selected	10
Strategic Value	57.37%

Efficient Frontier | Strategic Alignment

Strategic Value vs Total Cost

- Efficient Frontier
- Current Portfolio Selection Scenario
- Saved Portfolio Selection Scenarios

[Previous Review Priorities](#)

Project Name	Priority	Force in/out	Total Cost	Moved in/out	Enterprise Proj	Workflow Stags
Selected Projects			57.37%	\$7,845,000.00		
Shared GPS devices for transportation	8.26%	Auto	\$1,125,000.00	Unchanged	New Product De	4. Select Gate
Print Advertising Campaign System	8.15%	Auto	\$925,000.00	Unchanged	Software Develo	4. Select Gate
Acquisition Target Analysis	7.84%	Auto	\$860,000.00	Unchanged	Marketing Camp	4. Select Gate
E-campaign to bloggers	7.34%	Auto	\$856,000.00	Unchanged	Marketing Camp	4. Select Gate
Removable protective lining	7.29%	Auto	\$1,284,000.00	Moved-in	New Product De	4. Select Gate
Catalog Publishing	5.82%	Auto	\$435,000.00	Unchanged	Marketing Camp	4. Select Gate
Internal Software Database Audit	3.69%	Auto	\$700,000.00	Moved-in	Software Develo	4. Select Gate
Voice Recognition Product	3.55%	Auto	\$450,000.00	Unchanged	New Product De	4. Select Gate
Operations Management	3.46%	Auto	\$485,000.00	Unchanged	Merger & Acquisi	1. Initiate Gate
Software Security Audit	1.96%	Forced in	\$725,000.00	Moved-in	Software Develo	4. Select Gate
Unselected Projects			42.63%	\$12,015,000.00		
Knee and Elbow Pads	6.03%	Auto	\$1,100,000.00	Moved-out	New Product De	4. Select Gate
Lync 2012 Enterprise Deployment	5.62%	Auto	\$1,000,000.00	Moved-out	Infrastructure &	4. Select Gate
Audit Tracking Solution	4.99%	Auto	\$1,020,000.00	Unchanged	Software Develo	4. Select Gate
Helmet with integrated survivor	4.88%	Auto	\$800,000.00	Moved-out	New Product De	4. Select Gate
Data Exchange and Integration	3.91%	Auto	\$730,000.00	Unchanged	Software Develo	4. Select Gate
Data Parsing Tool	2.88%	Auto	\$850,000.00	Unchanged	Software Develo	4. Select Gate
Merger and Acquisition Deal Room	2.57%	Auto	\$630,000.00	Unchanged	Merger & Acquisi	4. Select Gate
Hub Upgrade	2.48%	Auto	\$705,000.00	Unchanged	Marketing Camp	4. Select Gate
Customer service feedback portal	2.05%	Auto	\$910,000.00	Unchanged	Marketing Camp	4. Select Gate
Software Development Plan	1.9%	Auto	\$900,000.00	Moved-out	Software Develo	4. Select Gate
Automated Software Installation	1.86%	Auto	\$800,000.00	Moved-out	Merger & Acquisi	4. Select Gate
Apparel ERP Upgrade	1.64%	Auto	\$1,020,000.00	Unchanged	Infrastructure &	4. Select Gate
Internal Application Customization	0.95%	Auto	\$800,000.00	Unchanged	Software Develo	4. Select Gate
Software Benchmarking Architecture	0.85%	Auto	\$750,000.00	Unchanged	Software Develo	4. Select Gate



Sales Dashboard

Salesperson from: Annette Hill

Company: jetCorp, North America; jetCorp, UK; Unknown

Salesperson: John Roberts; Mary A. Dempsey; Roberto Hernandez

Year: 2007-2011

Country: Germany, Great Britain, Iceland, Netherlands, Slovenia, Spain, Sweden, Switzerland, USA

Global Dimension 1: CORPORATE - Corporat, EVENTS - Events and T, SPORTS - Sports & Act...

Global Dimension 2: LARGE - Large Business, MEDIUM - Medium Bu..., SMALL - Small Business



ng Services



Project Online
Mas productividad

Mas simple para el Project Manager



SharePoint

BROWSE PROJECTS

New Open Add SharePoint Sites Build Team Resource Plan Permissions

Propuestas

Projects

Approvals

Tasks

Timesheet

Resources

Strategy

Driver Library

Driver Prioritization

Portfolio Analyses

Reports

Investigación y Desarrollo tecnologías 2/1/2013 5/15/2013 0% 1,448h 74d

Mantenimiento Banca 3/4/2013 5/13/2013 0% 0h 51d

Add SharePoint Sites to Project Web App

You can create new projects in Project Web App from existing tasks lists. Select the SharePoint Sites you want to add, enter the project name, and select a tasks list. This tasks list is used to create the project.

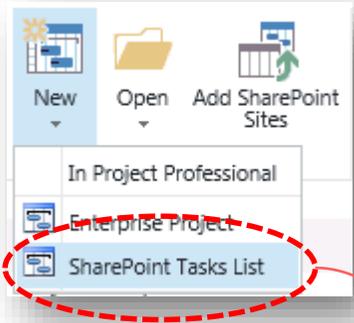
SharePoint Site ↑	Project Name	Tasks List
<input type="checkbox"/> Proyecto en SharePoint	Proyecto en SharePoint	Tasks

Add Cancel

	Project Name ↑	Start	Finish	% Complete	Work	Durat
	Diseño e Implementación Interfaz S	4/10/2013	5/7/2013	0%	160h	20d
	Investigación y Desarrollo tecnologías	2/1/2013	5/15/2013	0%	1,448h	74d
	Mantenimiento Banca	3/4/2013	5/13/2013	0%	0h	51d
	Migración SharePoint 2010 a 2013	3/12/2013	4/15/2013	0%	0h	25d
	Propuesta 1	3/21/2013	3/21/2013	0%	0h	0d
	Propuesta 2	3/13/2013	3/13/2013	0%	0h	0d
	Proyecto Empresarial	2/26/2013	4/10/2013	13%	120h	32d
	Proyecto en SharePoint	3/10/2013	4/5/2013	0%	168h	20d
	Proyecto Simple	3/11/2013	4/5/2013	33%	120h	20d
	Revisión Arquitectura	2/1/2013	5/1/2013	0%	1,024h	64d
	Tareas Administrativas del equipo I	2/4/2013	5/16/2013	0%	224h	74d

Mas alternativas para iniciar proyectos

Mas simple para el Project Manager



March 13 March 17 March 21 March 25

Análisis y relevamiento
3/12 - 3/15

Desarrollo
3/18 - 3/29

Reunion de Kickoff
3/11

+ new task or edit this list

All Tasks Calendar Completed ... Find an item

<input type="checkbox"/>		Due Date	Assigned To
<input checked="" type="checkbox"/>	Add a new item to this list or library.		
<input checked="" type="checkbox"/>	Reunion de Kickoff *	... March 11	
<input checked="" type="checkbox"/>	Análisis y relevamiento *	... March 15	
<input type="checkbox"/>	4 Desarrollo *	... March 29	
<input type="checkbox"/>	Sitio *	... March 22	<input type="checkbox"/> Leonardo Perosio
<input type="checkbox"/>	Web Part *	... March 29	<input type="checkbox"/> Leonardo Perosio
<input type="checkbox"/>	Ajustes e implementación *	... April 05	

Gestión de proyectos pequeños a través de listas SharePoint



Project Online

Mas simple de Administrador



- **La PMO se independiza del departamento de TI**
- **Sincronización con AD de la organización.** Luego se le asigna la responsabilidad de gestionar los recursos de Project Online a un colaborador de la PMO
- **Seguridad. Opciones de modos de permisos en ProjectOnline.** Puede ser propio o a través del modelo de seguridad integrado de SharePoint
- **Aseguramiento de respaldos de datos continuos y monitoreo de la performance**



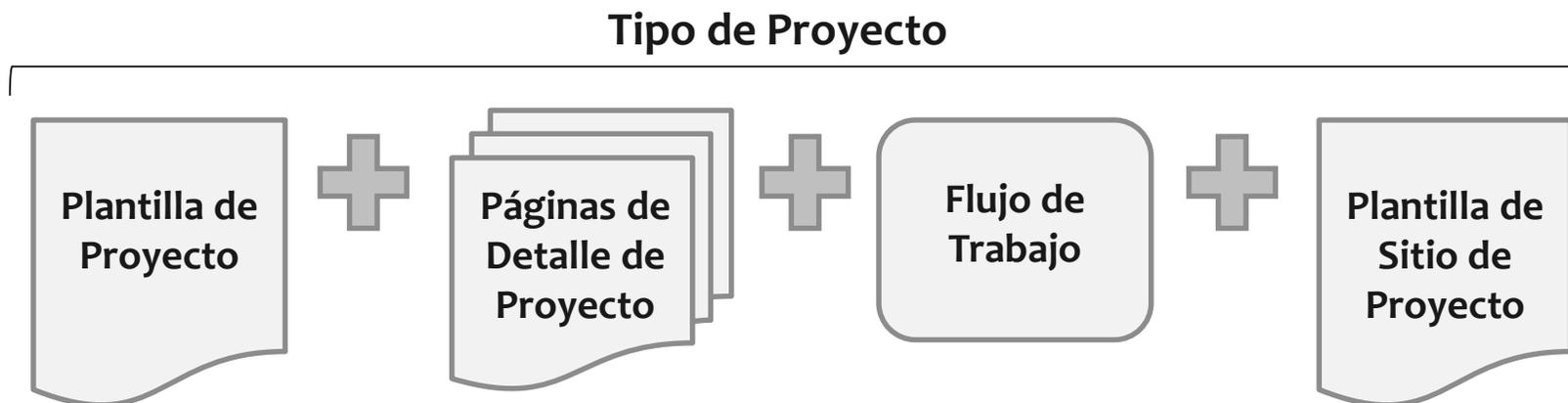
Project Online

Potencial de customización



Los **Tipos de Proyecto** son elementos claves para la gestión del ciclo de vida de un proyecto.

Un Tipo de Proyecto esta compuesto por una Plantilla de Proyecto, un conjunto de Páginas de Detalle de Proyecto, un Flujo de Trabajo (opcional), y una Plantilla de Sitio de Proyecto.





Tipo de proyecto empresarial
[EPT]

Workflow del proyecto

Plantilla del plan Gantt

Sitio del proyecto



SHP Designer + Visio

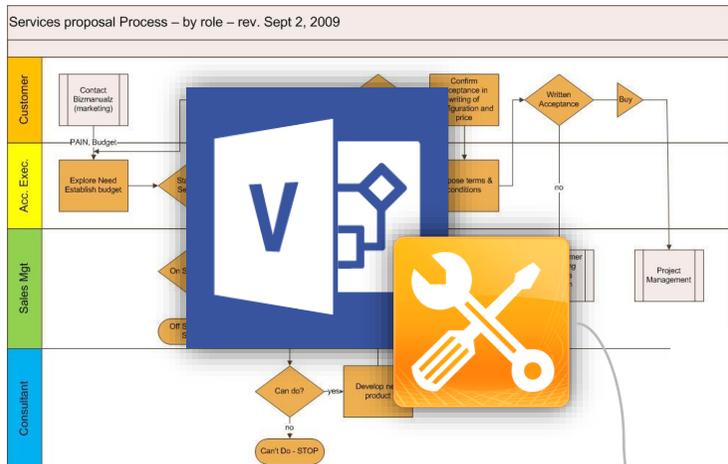


MS Project 2013

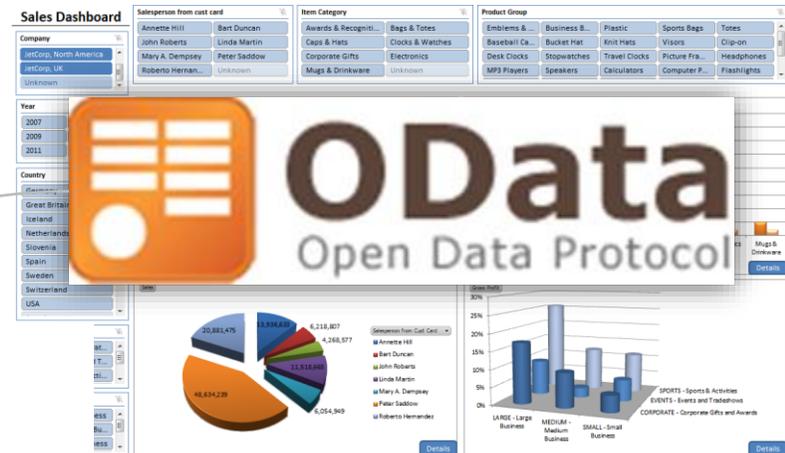


Versión 2013

Cuales son los principales desarrollos / configuraciones en implementaciones?



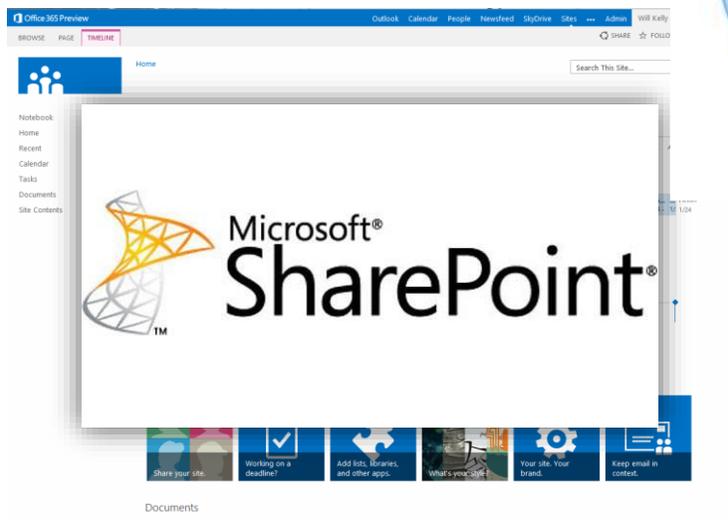
Gestión de la demanda



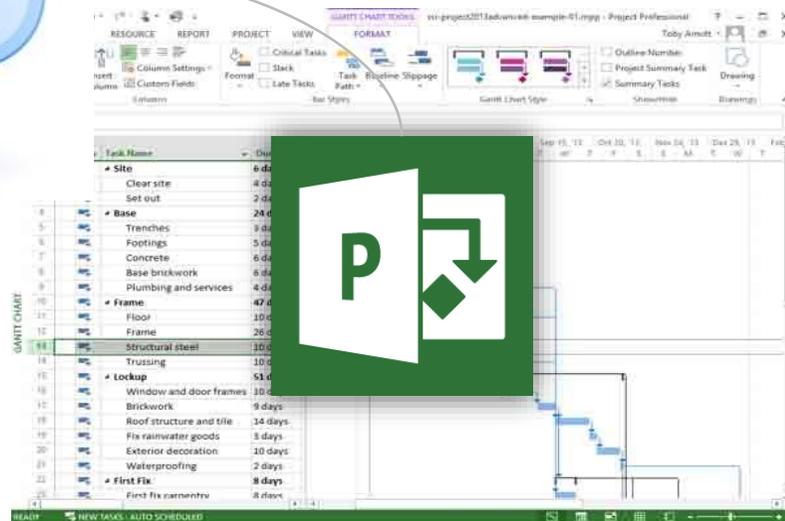
Reporting



Project Online



Definición de sitios de proyecto

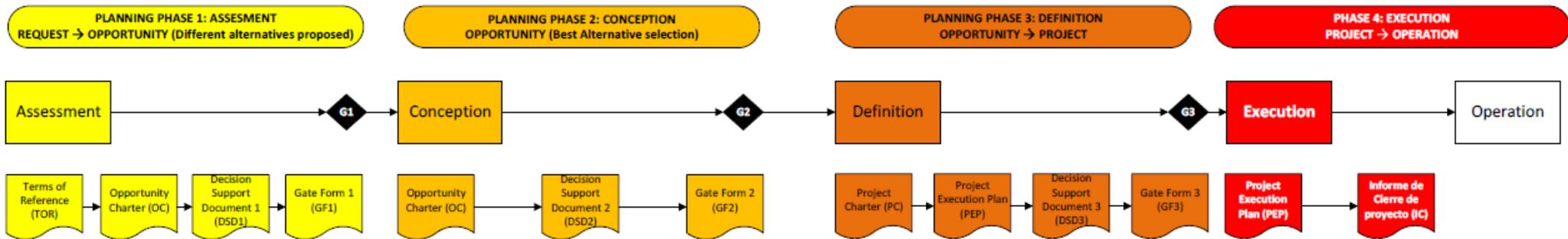


Definición de plantillas (Gantt) de proyecto



Ejemplo de implementación: Metodología ABC

El proceso...



Deliverable status – Opportunity/project status per phase

Document	Document Status	Opportunity Status
TOR	Loaded	Initiated
OC	Loaded	Initiated
OC	Validated	In progress
OC	Needs rework	Initiated
DSD1	Loaded	In progress
DSD1	Validated	Approval in progress
DSD1	Needs rework	In progress
GF1	Approved	Approved
GF1	Needs rework	In progress
GF1	Cancelled	Cancelled
GF1	Suspended	Suspended

Document	Document status	Opportunity status
GF1	Approved	Initiated
OC	Loaded	Initiated
OC	Validated	In progress
OC	Needs rework	Initiated
DSD2	Loaded	In progress
DSD2	Validated	Approval in progress
DSD2	Needs rework	In progress
GF2	Approved	Approved
GF2	Needs rework	In progress
GF2	Cancelled	Cancelled
GF2	Suspended	Suspended

Document	Document Status	Project Status
GF2	Approved	Initiated
PC	Loaded	Initiated
PC	Validated	In progress
PC	Needs rework	Initiated
PEP	Loaded	In progress
PEP	Validated	In progress
PEP	Needs rework	In progress
DSD3	Loaded	In progress
DSD3	Validated	Approval in progress
DSD3	Needs rework	In progress
GF3	Approved	Approved
GF3	Needs rework	In progress
GF3	Cancelled	Cancelled
GF3	Suspended	Suspended

Document	Document Status	Project Status
GF3	Approved	Initiated
PEP	Loaded	Initiated
PEP	Validated	In progress
PEP	Needs rework	Initiated
IC	Validated	Approval in progress
IC	Approved	Closed
IC	Needs rework	In progress



Implementando ABC sobre Project Online



- Definiciones de diseño:
 - **CERO** Desarrollo
 - Realizable en **Project Online**
 - **Seguridad** en el proceso (controlado por grupos SharePoint)
 - Validaciones **automáticas**



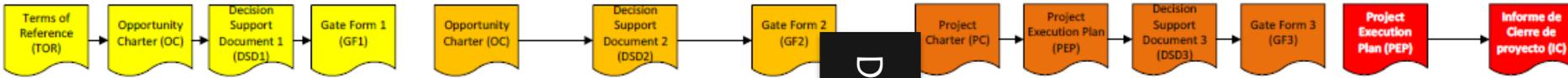
PLANNING PHASE 1: ASSESMENT
REQUEST → OPPORTUNITY (Different alternatives proposed)

PLANNING PHASE 2: CONCEPTION
OPPORTUNITY (Best Alternative selection)

PLANNING PHASE 3: DEFINITION
OPPORTUNITY → PROJECT

PHASE 4: EXECUTION
PROJECT → OPERATION

Workflow de Proyecto Empresarial



Deliverable status – Opportunity/project status per phase

Document	Document Status	Opportunity Status	Document	Document status	Opportunity status	Document	Document Status	Project Status	Document	Document Status	Project Status
TOR	Loaded	Initiated	GF1	Approved	Initiated	GF2	Approved	Initiated	GF3	Approved	Initiated
OC	Loaded	Initiated	OC	Loaded	Initiated	PC	Loaded	Initiated	PEP	Loaded	Initiated
OC	Validated	In progress	OC	Validated	In progress	PC	Validated	In progress	PEP	Validated	In progress
OC	Needs rework	Initiated	OC	Needs rework	Initiated	PC	Needs rework	Initiated	PEP	Needs rework	Initiated
DSD1	Loaded	In progress	DSD2	Loaded	In progress	PEP	Loaded	In progress	IC	Validated	Approval in progress
DSD1	Validated	Approval in progress	DSD2	Validated	Approval in progress	PEP	Validated	In progress	IC	Approved	Closed
GF1	Approved	Approved	GF2	Approved	Approved	DSD3	Loaded	In progress	GF3	Approved	Approved
GF1	Needs rework	In progress	GF2	Needs rework	In progress	DSD3	Validated	Approval in progress	GF3	Needs rework	In progress
GF1	Cancelled	Cancelled	GF2	Cancelled	Cancelled	GF3	Cancelled	Cancelled	GF3	Cancelled	Cancelled
GF1	Suspended	Suspended	GF2	Suspended	Suspended	GF3	Suspended	Suspended	GF3	Suspended	Suspended

Dependencia

Documentos

Documentos

Documentos

Documentos

Worflows de documentos SharePoint



Workflow de Proyecto Empresarial

Fases

Etapas

Formularios (PDPs)

Campos custom
empresariales

Proyecto FEL

- **Assessment**
 - Terms of Reference (TOR)
 - *Metadatos / Documentos*
 - Opportunity Charter (OC)
 - *Metadatos / Documentos*
 - Decision Support (DS)
 - *Metadatos / Documentos*
 - Gate Form 1
 - *Combo de aprobación*
 - *Comentarios*
 - *Etc.*
- **Conseption**
- **Definition**
 - Project Charter (PC)
 - *Metadatos / Documentos*
 - *Impulsores de negocio*
- **Execution**
 - Project execution plan (PEP)
 - *Metadatos / Documentos*
 - *Schedule (GANTT)*

Cómo se controla el proceso?



Fase:
Assesment

Fase:
Conception

Etapa:
Terms of
Reference

Etapa:
Oportunity
Charter

Etapa:
Decision Support
Document 1

Etapa:
Gate Form 1

Etapa:
Oportunity
Charter

TOR definido?

OC validado?

DSD1 validado?

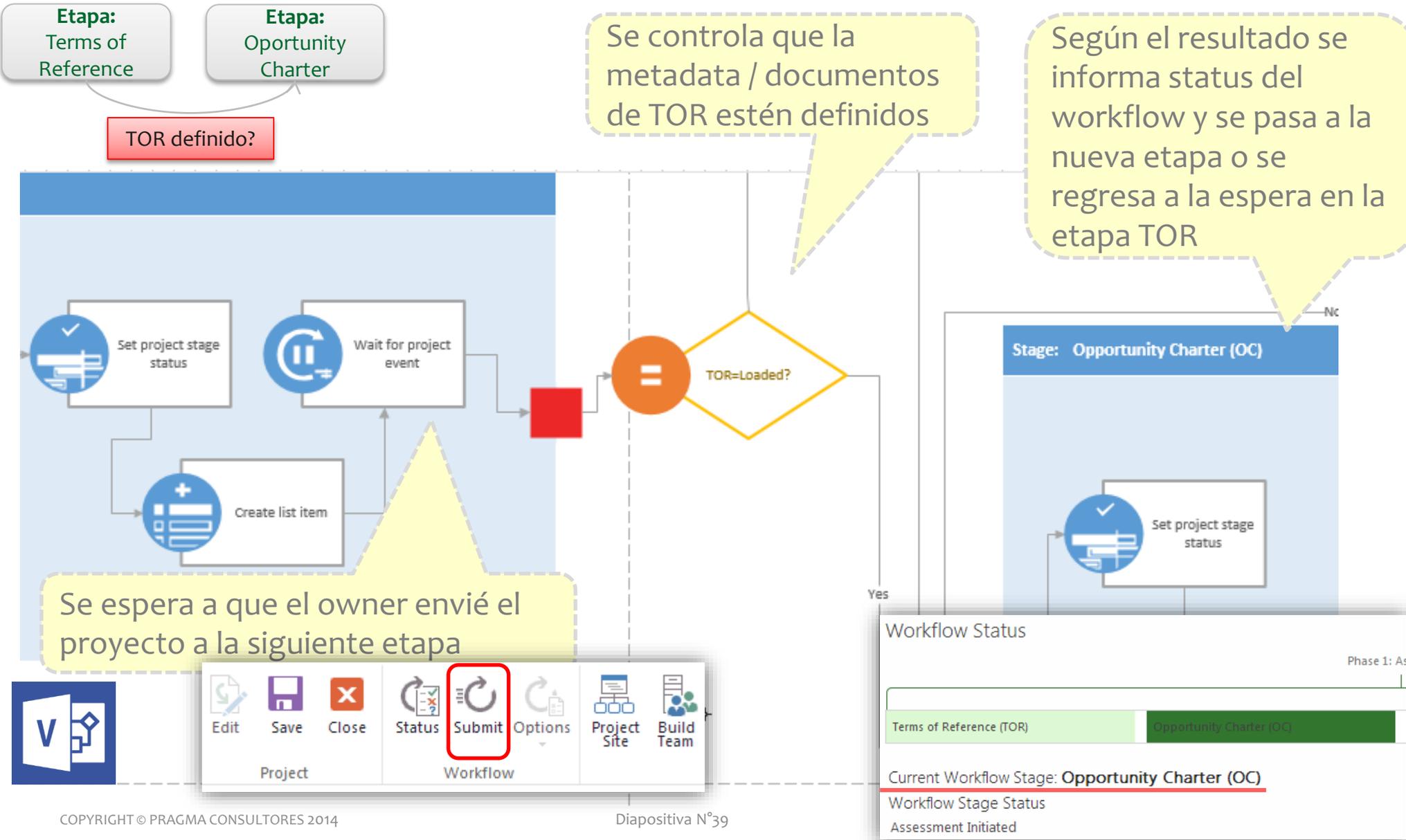
GF1 aprobado?

Ante cada evento de cambio de etapa se validan campos custom o documentos presentes en bibliotecas. Se realiza el cambio de etapa o se informa al usuario si una validación falló

Las validaciones de etapa lo realiza la lógica del workflow

- Campos custom definidos desde formularios del workflow (PDPs)
 - Documentos en bibliotecas SharePoint

Cómo se define la lógica del workflow?



Cómo se diseñan los formularios?



BROWSE PROJECT PAGE

Edit Save Close Status Submit Options Project Site Build Team Documents Deliverables Issues Resource Plan Project Permissions Previous Next

Project Workflow Navigate Page

Proyecto 8

Status: Checked-out to you since 2/25/2014 4:07 PM **Last Modified:** 9/17/2013 4:59 PM

Terms of Reference

Opportunity Charter

Decision Support Document 1

Gate Form 1

Project Site

Projects

Approvals

Tasks

Resources

Reports

Reports level 1

Reports level 2

Other

Assessment Documents

TOR Documents

OC Documents

Sección protegida solo para usuarios aprobadores

Project Workflow

GF1 Document Status

Pending

...

Workflow Comments

9/12/2013 7:13:16 PM: Workflow iniciado por System Account

Sección visible para aprobadores y PMs

GF1 Metadata

Name *

Proyecto 8

Cómo se diseñan los formularios?



WebPart nativo para generar formularios PDP

Selección de campos a mostrar

Add a Web Part

Project Workflow

GF1 Document Status

Pending

Workflow Comments

9/12/2013 7:13:16 PM: Workflow iniciado por System Account

Minimize

Close

Delete

Edit Web Part

Edit Web Part

Export...

Help

Selección de la audiencia del WebPart (los aprobadores del Gate 1)

Project Workflow

Displayed Project Fields

- GF1 Document Status
- Workflow Comments

Modify

Appearance

Title

Project Workflow

Title Icon Image URL

Import Error Message

Cannot import this Web Part.

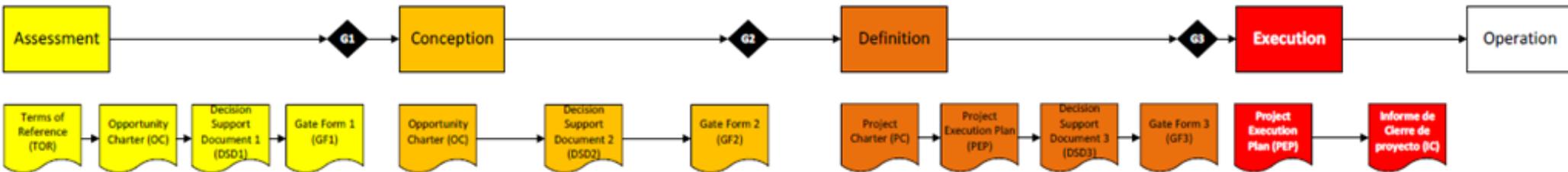
Target Audiences

GF1 Document Approvers:

Project Web App

OK Cancel Apply

Cómo continua el workflow?



Current Workflow Stage: Gate Form 2 (GF2)

Workflow Stage Status

Conception Approval in progress

Workflow Phase: Phase 1: Asesment					
✓	Terms of Reference (TOR)	Completed	2/26/2014 3:22 PM	2/26/2014 3:25 PM	Assessment Initiated
✓	Opportunity Charter (OC)	Completed	2/26/2014 3:25 PM	2/26/2014 3:26 PM	Assessment Initiated
✓	Decision Support Document 1 (DSD1)	Completed	2/26/2014 3:26 PM	2/26/2014 3:27 PM	Assessment In Progress
✓	Gate Form 1 (GF1)	Completed	2/26/2014 3:27 PM	2/26/2014 3:28 PM	Assessment Approved
Workflow Phase: Phase 2: Conception					
✓	Opportunity Charter (OC2)	Completed	2/26/2014 3:28 PM	2/26/2014 3:31 PM	Conception Initiated
✓	Decision Support Document 2 (DSD2)	Completed	2/26/2014 3:31 PM	2/26/2014 3:32 PM	Conception Initiated
➔	Gate Form 2 (GF2)	In Progress (Waiting for Input)	2/26/2014 3:32 PM		Conception Approval in progress
Workflow Phase: Phase 3: Definition					
	Project Charter (PC)	Not Started			
	Project Execution Plan (PEP)	Not Started			
	Decision Support Document 3 (DSD3)	Not Started			
	Gate Form 3 (GF3)	Not Started			
Workflow Phase: Phase 4: Execution					
	Project Execution Plan (PEP2)	Not Started			
	Información de Cierre de Proyecto (IC)	Not Started			
	Cancelled	Not Started			
	Suspended	Not Started			



Project Server 2013

Cómo se simplifica Gestión de la Demanda?

Cómo se simplifica Gestión de la Demanda?



Create Site Workflow ? X

Add a new site workflow to your site

Enter a name and description for your new workflow

Name:
[Text Field]

Description:
[Text Field]

Choose the platform to build your workflow on

Platform Type: SharePoint 2013 Workflow - Project Server ▼

- SharePoint 2010 Workflow
- SharePoint 2013 Workflow
- SharePoint 2013 Workflow - Project Server**

OK Cancel

Crear workflows de proyecto desde SharePoint Designer, con posibilidad de trabajar en un editor basado en texto o un editor visual (integrado a Visio)



Workflow de Propuestas

Project Web App ▶ Workflows ▶ Workflow de Propuestas ▶ Text-Based Designer ▶

Stage: Datos iniciales de la propuesta

Wait for Event: When a project is submitted

Transition to stage

If Project Data:Costo de la Propuesta is greater than 25000

- Go to Rechazo automático

Else

- Go to Detalles de la Propuesta

Stage: Detalles de la Propuesta

(Start typing or use the Insert group on the Ribbon.)

Transition to stage

- Go to Ejecución

Utilización de acciones predefinidas, eventos, condicionales, etc.
Acceso a campos del proyecto, listas del proyecto, usuarios, etc.

Cómo se simplifica Gestión de la Demanda?



Stage: Gate Form 1 (GF1)

Define E-mail Message

To:

CC:

Subject: [%Project Data:Project Name%]

Segoe UI

3

B

I

U

Automatic

Este es el cuerpo del email

Select Users

Type a Name or E-mail Address:

Or select from existing Users and Groups:

People/Groups from SharePoint site...
Workflow Lookup for a User...

1212 Owners
1212 Visitors
121212 Members
121212 Owners
121212 Visitors
23 Owners
23 Visitors
24 Members
24 Owners
25 Visitors
26 Members
26 Owners
26 Visitors

Selected Users:

Add >>

<< Remove

Move Up

Move Down

OK

Cancel

Lookup for Person or Group

Field Data to Retrieve

Choose the data source to perform the lookup on, then the field to retrieve data from:

Data source: Project Data

Field from source: Project Owner Email

Return field as: As String

Clear Lookup

OK

Cancel

OK

Cancel



- **Crear Proyectos empresariales desde ítems en listas SharePoint:**
 - **Las propuestas, iniciativas o requerimientos se pueden cargar en listas de SharePoint.**
 - La lista SharePoint, puede existir en cualquier sitio de la granja, puede contener cualquier set de columnas, vistas, workflows, permisos, etc.
 - **Es posible mapear columnas de la lista a campos enterprise de Project Server 2013.**
 - Finalmente, **cada ítem de la lista SharePoint se puede convertir en un proyecto Project Server 2013, sin restricciones de elección para el EPT**



List Information

Name: Propuestas
Web Address: http://servdesa250/PWA/Lists/Propuestas/AllItems.aspx
Description:

General Settings

- List name, description and navigation
- Versioning settings
- Advanced settings
- Validation settings
- Audience targeting settings
- Rating settings
- Form settings
- Project Server settings

Permissions and Management

- Delete this list
- Save list as template
- Permissions for this list
- Workflow Settings

Communications

- RSS settings

Field Mappings

Choose how the columns in this list will map to fields in Project Web App.

Column Name	Data Type	Project Web App Fields
Title	Single line of text	Project Name
Costo inicial	Currency	Initial Cost
Fecha de inicio estimada	Date and Time	Start Date
Owner (PM)	Person or Group	Project Owner ID
Created By	Person or Group	
Modified By	Person or Group	

Additional Settings

- Create a new enterprise custom field in Project Web App.
- Reload the list of fields.

Cómo se simplifica Gestión de la Demanda?



SharePoint

BROWSE ITEMS LIST

New Item New Folder Create Projects View Item Edit Item Delete Item Attach File Workflows Approve/Reject Tags & Notes

Propuestas

Projects Approvals Tasks Timesheet Resources Strategy Driver L Driver P Portfolio Reports

new item or edit this list

All Items Find an item

Title	Costo inicial	Fecha de inicio estimada	Owner (PM)
Propuesta 1	\$20,000.00	3/21/2013	i:0#w guillermo filia

Project Name	Start	Finish	2/24/2013	3/3/2013	3/10/2013	3/17/2013	3/24/2013
			S M T W T F S	S M T W T F S	S M T W T F S	S M T W T F S	S M T W T F S
Diseño e Implementación Interfaz S	4/10/2013	5/7/2013					
Investigación y Desarrollo tecnologías	2/1/2013	5/15/2013	█	█	█	█	█
Mantenimiento Banca	3/4/2013	5/13/2013		█	█	█	█
Migración SharePoint 2010 a 2013	3/12/2013	4/15/2013			█	█	█
Propuesta 1	3/21/2013	3/21/2013			█		
Propuesta 2	3/13/2013	3/13/2013			█		
Proyecto Empresarial	2/26/2013	4/10/2013	█	█			
Proyecto Simple	3/11/2013	4/5/2013			█	█	
Revision Arquitectura	2/1/2013	5/1/2013	█	█	█	█	█
Tareas Administrativas del equipo I	2/4/2013	5/16/2013	█	█	█	█	█





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