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Microsoft Enterprise Project Management (EPM) Solution

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Enterprise Project Management (EPM) Solution Version Comparison

The Microsoft Enterprise Project Management (EPM) Solution ensures organizations select and deliver the right projects, while gaining greater visibility and control of resources. Innovative new capabilities in Project Server 2010 built on Microsoft® SharePoint® Server 2010 lead to improved productivity and better business performance. Compare enterprise level capabilities across versions.

Feature Key:
included ○ improved ● new ★

	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Demand Management					
Governance Workflow Define and enforce governance workflows to subject projects to the appropriate controls throughout their lifecycle.		○		○	●
Establish Accountability and Project Lifecycle Approvals Drive accountability and control by designating individual approvers or approval groups at key gates in the workflow.		○		○	●
Capture Project Requests Capture all project requests in a central repository.	○	○	●	○	●
Capture Non-project Work Capture and manage non-project work (e.g., incidents, tickets etc.)			★		●
Configurable Business Case Template Standardize data collection (including, general information, cost estimates, resource estimates, strategic impact, etc.) for all types of work through configurable business cases / forms.		○	★	○	●
Business Unit-specific Templates Flexibility to define business case templates for different departments within the organization.					★
Initiate Work from Other Systems Initiate work from other Microsoft applications and line of business systems (e.g., SharePoint Task lists, Visual Studio Team Foundation Server, Help Desk Systems, CRM, etc.)	○	○	●	○	●
Best Practice Templates Save time and enforce standards by defining templates based on your organization's best practices or take advantage of industry best practice templates (e.g., Business Case, Project and Project site).	○	○	●	○	●
Portfolio Selection					
Business Strategy Prioritization					
Define and Communicate Organization's Strategy Define and communicate actionable business drivers and key performance indicators (KPIs).		○		○	●
Business Unit Specific Business Drivers Define different business drivers for each department / line of business.		○		○	○

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Portfolio Selection

	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Business Strategy Prioritization					
Objectively Prioritize Business Strategy — Objectively prioritize business drivers using pairwise technique to drive executive consensus and communicate strategic imperatives.		◯		◯	●
Manually Prioritize Strategy — Manually prioritize business drivers.		◯		◯	●
Prioritization & Optimization					
Prioritize Projects from Varying Dimensions — Prioritize competing project requests from varying dimensions (e.g., strategic value, financial value, risk, etc.)	◯	◯	◯	◯	●
Identify Business Dependencies — Capture inter-project dependencies that affect selection and execution.		◯		◯	●
Identify Optimal Portfolio within the Constraints — Run what–if analysis under varying budgetary constraints to recommend the optimal project portfolio.		◯		◯	●
Include Mandatory Projects and Understand Trade Offs — Force projects In or Out of a portfolio (e.g., used to force in compliance or pet projects) to instantaneously understand trade offs.		◯		◯	●
Easily Compare Scenarios — Compare and contrast optimization analyses side by side.		◯		◯	●
Advanced Portfolio Analytics — Utilize advanced portfolio analytical techniques (e.g., Efficient Frontier Modeling and Strategic Alignment Assessment) to further refine portfolio selection and gain insights.		◯		◯	●
Support Portfolio Analysis throughout Project Lifecycle — Prioritize and optimize pending and in-flight projects within the same analysis (i.e., support annual and just in time planning methodologies).		◯		◯	●
Configurable Views to Support Decision Making — Configure and dynamically modify views by adding fields and applying filters to support decision making.					★

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	EPM 2003		EPM 2007		EPM 2010
Capacity Planning (Skill level)	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Understand Resource Capacity Proactively identify resource (by skill) surplus and deficit across a planning horizon.	○		○		●
Reschedule Projects to Maximize Resource Utilization Improve utilization and fully staff projects by adjusting schedules within the planning horizon.					★
Model Headcount Decisions Model headcount decisions by hiring full-time or contract resources and understand impact on the project portfolio.					★
Easily Compare Capacity Planning Scenarios Compare and contrast capacity analyses side by side.					★
Automate Portfolio Selection Commit selected portfolio scenario and automatically update project workflow.					★

Schedule Management

Best Practice Project Templates Initiate project plans using best practice templates with schedule and resource assignments pre-defined.	○		●		●
Flexible Scheduling Methods Enable or disable the CPM scheduling logic to better support occasional and professional project managers.					★
Top Down and Bottom Up Planning Support Support for top down planning and rolling wave planning.					★
Web-based Scheduling Create web-based schedules.		○	★	○	●
Advanced Web-based Scheduling Create, modify and manage simple and complex project schedules on the web.					★
Effectively Communicate Project Schedules Effectively communicate project schedules using intuitive views and tools.	○		●		●
Generate Timeline View Build and customize timeline view to visualize schedule details and communicate with stakeholders.					★
Easily Move Schedule Data between Applications Easily copy and paste information from the project plan to other office applications while maintaining data fidelity.	○		○		●

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Schedule Management

Feature	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Initiate Projects from Other Applications — Quickly create project plans by importing SharePoint Task lists or copying bulleted text from Office applications.			★		●
Excel-Like Ease of Use — Make Project Professional simpler to use, just like Microsoft® Excel, by easily adding new columns, enabling text wrapping and sorting and filtering columns.					★
Perform What-if Analysis and Undo Actions — Model different scenarios and safely return to the original state with multi-level undo/redo.			★		●
Model Scheduling Scenarios — Active/inactivate tasks to view various scheduling scenarios and perform what-if analysis.					★
View Impact of Changes — Instantaneously see the impact on the project schedule with Change Highlighting.			★		●
Schedule Warnings — Be alerted to scheduling issues, drill down to identify issues and take corrective action.	○		●		●
Multiple Baseline Support — Set multiple baselines to measure project performance.	○		○		○
Reschedule Uncompleted Work — Easily reschedule all uncompleted tasks and see impact on the schedule.	○		○		○
Set Project and Task Dependencies — Simply define task relationships (e.g., start to finish) and capture inter-project dependencies.	○		○		○
Specify Project Deliverables — Define soft inter-project dependencies (i.e., Deliverables) that will not automatically impact the project schedule if there is a slippage.			★		●
Versatile Views to Review the Schedule — Utilize Gantt Charts, Calendars, Task Sheets, and a variety of views to manage and present project information.	○		●		●
Critical Path Identification — Quickly identify critical path within the project schedule and across multiple projects.	○		○		●
Project and Task Calendars — Define project and task specific calendars to accurately reflect working time and non-working exceptions.	○		○		○

Resource Management

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	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Enterprise-wide Resource Pool Create and manage an enterprise resource pool containing all resources and skills.	○	○	○	○	●
Filter Resources by Business Units Establish and manage resources at the business unit level.					★
Automate Resource Pool Creation Automate resource pool creation by syncing with Active Directory or integrating with ERP or line-of business systems.	○		○		●
Define Material Resources Add consumable material resources such as lumber or concrete and assign them to tasks.	○		○		○
Resource Calendars Define resource calendars to reflect resource-specific working times, availability and non-working exceptions (e.g., vacations, sick days, etc.)	○		●		○
Multiple-skill Resources Assign multiple skills and cost rates to an individual resource.	○		○		○
Match Resources Based on Multiple Dimensions Easily find resources with availability to work on the project using multiple criteria (e.g., skills, location, availability, department etc.)	○		○		○
Capture Resource Demand Plan resource demand prior to assigning resources to tasks.		○	★	○	○
Proposed vs. Committed Bookings Differentiate between proposed and committed resource assignments.	○		○		○
Support Team Assignments Assign work to teams and allow a member of the team to take ownership of the assignment.			★		○
Effectively Manage Resources Intuitively and effectively manage assignments by resource and quickly visualize over allocation.	○		○		●
Easily Substitute Resources Effectively substitute resources.	○		○		●
Communicate and Delegate Tasks Communicate resource assignments and allow individuals to accept and delegate tasks.	○		●		●
Balance Resource Workloads Use resource leveling features to overcome over-allocation.	○		○		●

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Time and Task Management

	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Web-based Timesheet System — Easy to use time entry for timesheet (including working and non-working time, e.g., vacation, sick leave, etc.) and task updates.	○		●		●
Consolidated Progress and Time Tracking — Submit project status and timesheet entries from a single interface.					★
Integrate Time Reporting with Financial Systems — Report actual hours for project, administrative, and non-working time to financial systems (e.g., for payroll, costing, chargeback, etc.)			★		●
Create New Tasks for Time Reporting — Allow users to add tasks to projects and timesheets for complete time reporting.	○		●		●
Use Outlook to View and Update Tasks — Maximize user productivity by managing tasks in Outlook.	○		●		●
Communicate on Task Assignments — Receive task notification and updates via PC and Web.	●		○		●
Timesheet Approvals — Project and functional managers approve progress and timesheet updates.	○		●		●
Multi-Level Timesheet Routing — Perform multi-step timesheet reviews and approvals.					★
Approval Preview — Preview changes online before accepting them into your schedule.			★		●
Control Timesheet Entry — Allow time entry within approved and open date ranges.			★		○
Submit and Approve Time on Behalf of Others — Take on a role of another user to perform time entry and task approvals when needed.			★		●
Extensible Timesheets — Flexible and extensible timesheet design.			★		●

Financial Management

Project Cost Estimates — Capture time-phased cost estimates during business case development.	○	○	●	○	○

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		EPM 2003		EPM 2007		EPM 2010
Financial Management		Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Professional 2010
Define Project Benefits — Capture time-phased benefit estimates during the development of the business case.		○	○	○	○	○
Define Financial Metrics — Derive financial valuation metrics (e.g., NPV, ROI, IRR, etc.)		○	○	●	○	○
Define High Level Project/Program Budget — Define a high level budget so the project manager can allocate funds and track actual costs against the budget.			○	★	○	○
Budget Year Planning Support — Supports calendar year or fiscal period accounting.			○	★	○	○
Earned Value Management — Use EVA calculations including Schedule Performance Index (SPI), To Complete Performance Index (TCPI), Cost Performance Index (CPI), Cost Variance Percentage (CV%), and Schedule Variance Percentage (SV%).		○		○		○
Financial Systems Integration — Integration with Financial, ERP and line of business systems for financial data.			○	○	○	○
Microsoft Platform Applications Integration — Integration with Dynamics AX & SL for invoicing, procurement, expense management, multi-currency, etc.				○		○
Team Collaboration						
Effective Project Team Collaboration — Provision a Project Workspace for each project to drive collaboration and knowledge sharing.		○		●		●
Customize Project Workspaces for Each Project Type — Define custom Project Workspaces for different types of projects and work.						★
Track Project Issues and Risks — Create, manage and track issues and risks throughout the life of the project.		○	○	○	○	○
Enterprise Content Management — Includes best practice enterprise content management capabilities.		○	○	●	○	●
Support Common Types of File Formats — Ability to handle common types of file formats, e.g., Word, Excel, PowerPoint and Visio, PDF, HTML & other standard file formats.		○	○	●	○	●
Establish Document Templates — Define best practice document templates and include in Document libraries.		○	○	●	○	●

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Team Collaboration	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Document Review and Approval — Utilize workflow to streamline document review and approval.					☆
Web 2.0 Capabilities — Utilize Web 2.0 capabilities to enhance team collaboration and communication (e.g., Wikis, Blogs.).			☆		●
Intelligent Enterprise Search — Utilize search technologies to more easily locate project data, artifacts and people.					☆
Knowledge Management — Integration with Windows SharePoint Services (or SharePoint Foundation) for knowledge management and collaboration.	○		●		●
Expanded Knowledge Management and Collaboration — Integration with SharePoint Server for knowledge management and collaboration.			☆		●

Reporting and Business Intelligence

	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Powerful Business Intelligence Center — Utilize Microsoft's Business Intelligence capabilities to easily create powerful reports and dashboards (e.g., Excel Services, PerformancePoint Services, SQL Reporting Services, Self Service Business Intelligence, etc.)	○		☆	○	●
Quickly Build and Share Reports — Publish or use out-of-the-box best practice report templates to quickly build and share reports.	○	○	●	○	●
Surface Information and Deliver Reports through SharePoint — Deliver the right levels of information to each user through reports using SharePoint web parts.			☆		●
Multi-Dimensional Decision and Analysis Services — Define and build OLAP cubes for analysis and reporting of various dimensions of project data, including tasks, resources, projects, timesheets, etc.	○		●		●
Departmental Cubes — Provide business-unit specific cubes containing only data relating to a specific line of business.					☆
Portfolio Views across Entire PPM Lifecycle — Configure scorecard views to gain visibility and control across all project portfolios.	○	○	○	○	●
Project Performance Tracking — Track project performance against status KPIs (e.g., health, schedule, resource, cost, etc.).	○	○	●	○	●
Central and Extensible Data Store for All Portfolio Data — Dedicated reporting database for all project and portfolio data allowing for easy creation of customized reports.			☆		●

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Reporting and Business Intelligence

	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Easily Configurable Dashboards and Views Easily configure and publish dashboards and views.	○		●		●
Role-based Dashboards Create audience based dashboards and views.					★
BI Tools Integration Integration with Microsoft and 3rd party Business Intelligence tools.	○		●		●

Program Management

Program Business Case Definition Capture programs and develop business cases (including general info, cost, benefit, strategic impact, etc.)		○		○	●
Track Programs throughout PPM Lifecycle Ability to track programs throughout the lifecycle (initiation to post-implementation).	○	○	●	○	●
Associate Projects with Programs Link underlying projects to programs through master projects.	○	○	●	○	○

Administration, Deployment and Extensibility

Built on SharePoint Server 2010 Rich, full-featured productivity platform that delivers project portfolio management capabilities and flexible collaboration tools.			★		●
Consistent, Easy to Use Interface Reduce training requirements and drive adoption with a familiar and easy to use interface.	○	○	●	○	●
Simplified Central Administration Centralized administration module for configuring and managing both project and portfolio management capabilities.	○	○	●	○	●
Flexible and Comprehensive Security Control security and access privileges at the group and individual level.	○	○	●	○	●
Delegate Permissions to Other Users Allow users to delegate responsibilities when on vacation or out of the office.					★
Centralized Cube Management Intuitive interface for managing the reporting infrastructure to quickly add, edit delete, copy or refresh available cubes.	○		●		●

Administration, Deployment and Extensibility

	EPM 2003		EPM 2007		EPM 2010
	Project Server 2003 & Project Professional 2003	Project Portfolio Server 2006	Project Server 2007 & Project Professional 2007	Project Portfolio Server 2007	Project Server 2010 & Project Professional 2010
Enterprise Standards with Business Unit Customization — Provide specific configuration for each department / line of business, but maintain enterprise standardization.		○		○	●
Zero Desktop Footprint — No ActiveX download requirement.					★
Server and Desktop Scalability — 64-bit infrastructure delivers high performance and large program support.					★
Wide Area Network Deployments Support — Support EPM deployment across high work volume, geographically dispersed locations.	○		●		●
Quick Response Time and Efficient Processing — Enhanced performance through infrastructure improvements to support efficient processing and high volume operations.	○	○	●	○	●
Exchange Server Integration — Maximize productivity with out-of-the-box Exchange Server integration to receive and update your task assignments in Outlook via PC, Phone & Web.					★
Extensible and Scalable Interface — Documented read / write Application Programming Interface (API).	○		●		●
Backward Compatibility for Custom Applications — API is backward compatible with previous version (n -1 only).					★
Localized Project and Portfolio Capabilities — Project and Portfolio capabilities are localized to support varying countries / geographies.					★
Line of Business Integration — Effectively integrate PPM solution with line of business applications.	○		●		●
Visual Studio Team System Integration — Support Agile planning and better connect the worlds of PPM and Application Development.		★			●

Note: Project Server 2010 software and system requirements located at http://www.microsoft.com/project/2010/