

EPM Partners



EPM-in-a-Box

EPM-in-a-Box is a package of proven, standardised, consulting services (both business and technical), and installation and configuration processes, that delivers a successful implementation of Microsoft Project Server.

It is based upon a tried-and-tested EPM system implementation methodology that facilitates the configuration of typical and most-often implemented EPM functions - to the customer's specific requirements

Fixed Scope and Fixed Investment

EPM-in-a-Box is a fixed-investment, fixed-scope package that delivers excellent and fully-featured solutions. It is available in three versions - Lite, Standard and Enter-

Three Versions

EPM-in-a-Box is available in three different versions - Lite, Standard and Enterprise to reflect the level of implementation required. The features that are configured for each version are described in the table below. Note that specific additional features can be included in the selected version

<i>EPM-in-a-Box: Feature Sets</i>	Lite	Standard	Enterprise
Demand Management			✓
Portfolio Selection			✓
Capacity Planning (Skill Level)			✓
Schedule Management	✓	✓	✓
Resource Management	✓	✓	✓
Time and Task Management		✓	✓
Financial Management	✓	✓	✓
Team Collaboration	✓	✓	✓
Artefact Management	✓	✓	✓
Reporting and Business Intelligence			
• Project Server and SharePoint Views	✓	✓	✓
• Microsoft's EPM Reports Packs		✓	✓
• Excel Services and Performance Point Reports			✓
Program Management		✓	✓

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*EPM Partners is a unique, end-to-end, service provider supporting the complete
Microsoft Enterprise Project Management Solution*

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Services & Deliverables

EPM Partners provides the following services and deliverables as part of the **EPM-in-a-Box** package

Services

1. Conduct discovery meetings and workshops to gather and analyse requirements, current governance framework and portfolio management practice, detailed project scope and solution definition
2. Conduct workshops to demonstrate configuration options
3. Install the Microsoft Office Project Server 2010 software in two environments (production and test)
4. Design and document the EPM solution including a detailed usage workflow and functional specifications
5. Configure the EPM solution to align with the business requirements. To include:
 - Create and configure system objects metadata and properties for projects, programs, portfolios, resources and tasks.
 - Create and configure projects review, approval and selection workflows, with email notification and security settings
 - Create and configure cost estimate templates and structure
 - Create and configure projects benefits structure (financial and/or non-financial)
 - Create and configure organisation projects impact assessment criteria (i.e. business drivers or strategic objectives)
 - Create and configure projects selection and portfolio optimisation constraints (such as budget, resources availability, etc)
 - Create and configure an enterprise resource pool including teams, generic resources, cost resources and skills.
 - Create and configure Programs, Portfolios, Projects, Resources and Tasks online views and dashboards (including traffic-light KPIs) with the ability to export to MS Excel
 - Create and configure EPM data business intelligence (BI) using MS SQL Server Analysis Services (OLAP cubes) and MS SQL Reporting Services.
 - Configure EPM security model to meet client's access level requirements and usage workflow
 - Create and configure Microsoft SharePoint templates to be used to manage project workspaces and artefacts (i.e. documents, risks, issues, changes, etc)
 - Configure Time Sheets to capture resources efforts spend on project and/or non-project tasks
 - Integrate with SMTP server to provide email integration, reminders functionality, etc.
6. Conduct discovery meetings and workshops to gather and analyse requirements, current governance framework and Deploy and configure Microsoft Project Server Reports Pack (Standard and Enterprise) including one-page Project Status Report
7. Role-based user training as follows:
 - One Project Manager session (1 Day)
 - One Resource Manager session (½ Day)
 - One Team Members session (½ Day)
 - One Executive session (½ Day)
8. Provide system administrator training (one, 1 day training session)
9. Develop and deliver the following documents:
 - Scope Document
 - Project Schedule
 - Functional Specifications
 - Installation Specifications
 - User Training
 - Administrator Training

Deliverables

- Project Schedule
- Planning Workshop Agenda
- Vision Scope Document
- Requirements Log
- Test/Dev Server
- System Test Script Document
- System Testing Session
- Proof-of-Concept (PoC) Acceptance Document
- Production Server set-up
- UAT Script Document
- UAT Session
- Functional Specifications Document
- Install Specifications Document (Prod and Test/Dev)
- Training Materials and Documentation
- Role based Training
- Project Closure Document
- Project Status Reports

How to get started

Contact our head office to discuss further how an EPM-in-a-Box Solution package will bring business benefits to your organisation.