



# PPM Tools Analysis

The Good, the Bad & the Ugly



## Contents

01 Introduction

02 Microsoft  
PPM

03 Oracle  
Primavera

04 CA Clarity

05 Daptive  
AtTask  
JIRA

# Introduction

- Due, in part, to a combination of social and technological factors, demand for IT PPM software continues to grow
  - In 2012, Gartner declared an “Innovator Dilemma” at play in the PPM tool market: Well-established on-premises technology providers with seemingly secure customer bases and apparent lock on the market were being threatened by relatively new and low-end providers. Today in 2014, this declaration still holds true. We are seeing iterations of traditional on-premises PPM software products being replaced by new offerings.
  - Fewer features and functions is not necessarily a bad thing. Most of the mainstream buyers don’t need all the capability upfront. PPM tools are used to increase organisations’ maturity.
  - SIMPLICITY is very attractive.
  - SaaS is truly here, and it is changing the way PPM tools is offered.
  - Buyers are demanding more standards and best practices in their PPM tools.
  - However, there is still a risk with SaaS, e.g. Basecamp in March 2014. Gartner is not predicting a shift back to on-premises.
- 
- **Change management and manage the change**

# Pole #1 & #2

You and PPM Tools

What PPM Tools do you currently use

# Market Scope for IT Project and Portfolio Management Software Applications

	RATING				
	Strong Negative	Caution	Promising	Positive	Strong Positive
Augeo Software			X		
CA Technologies					X
Changepoint				X	
Genius Inside			X		
GFT Italia			X		
HP				X	
Microsoft				X	
Oracle				X	
Planisware			X		
Planview					X
Project.net			X		
SAP			X		
Sciforma				X	

As of 16 May 2014

# Gartner Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services



# Magic Quadrant for Integrated IT Portfolio Analysis Applications

- Integrated IT portfolio analysis (IIPA) bridges the gap between the formulation of IT strategies and the actual management of the physical changes made to the IT footprint in response to these strategies.
- The IIPA software market consists of vendors providing the integration of individual portfolios - for investments, projects, assets and IT services - to present a more holistic story regarding the true state of the IT portfolio.

# Gartner Magic Quadrant for Integrated IT Portfolio Analysis Applications





# Choosing a PPM Tool



- Cloud, Hosted or On-Premises
- From experience, the 4 main factors to consider:
  - Price / cost
  - Features / functions
  - Interface / users' adoption
  - Integration with existing applications
- <http://project-management.com/category/software-reviews/>
- <http://www.softwareinsider.com/>
- CA Clarity has good functional requirements and RFP templates.
- Gartner links:
  - <http://www.gartner.com/technology/reprints.do?id=1-1UB15TY&ct=140520&st=sg>
  - <http://www.gartner.com/technology/reprints.do?id=1-1UMU2B7&ct=140529&st=sb>
  - <http://www.gartner.com/technology/reprints.do?id=1-2500SC4&ct=141119&st=sb>

# Pole #3

Why are you Interested in PPM Tools

# Microsoft PPM - History

- Development of Microsoft Project was started in 1987 by a third-party contracting company, but following that company's acquisitions by Microsoft in 1988 development was brought in-house and V1 was finally released in 1990 - as part of the application offering for Microsoft Windows 3. A Macintosh version was released in July 1991.
- Microsoft Project was the company's third Microsoft Windows-based application.
- Then versions 5, 6, 7 and 8, known as 95, 98, 2000 and 2002.
- Version 9 known as Project 2003 offered the additional features of dynamic scheduling, new wizards, shared workspaces and smart tags, as well as enhanced help and assistance. Then Project 2007.
- Project 2010 introduced the ribbon.
- The latest is Project 2013
- Project Server History:
  - 2000 – Project Central
  - 2002 – Project Server 2002
  - 2003 – Office Project Server 2003
  - 2007 – Office Project Server 2007
  - 2010 – Project Server 2010
  - 2013 – Project Server 2013

# Microsoft PPM - the Good

- On-premise or SaaS (Project Online and Office365, *EPMonDemand*)
- Configuration capabilities are quite good, enabling skilled administrators and power-users
- Suited for organisations with good to excellent PPM maturity. However, it includes task management and collaboration functions that supports customers with low or inconsistent PPM maturity
- Geared towards supporting enterprise work management (this is on Microsoft's product roadmap)
- Built on SQL Server which provides excellent reporting and business intelligence (BI) capabilities.
- It's built on SharePoint. In fact it is SharePoint !
- Integrates with other Microsoft technologies - Dynamics, CRM, etc.
- Large partner ecosystem

# Microsoft PPM - the Bad

- Organisations with limited support resources may struggle configuring / maintaining it.
- Build on SharePoint, SQL, Project Server and Project Professional – technically complex.
- No out-of-the-box vertical applications.
- Limited out-of-the-box reports

# Microsoft PPM - the Ugly

- Was not ranked as a leader in Gartner Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services for 2014
- Microsoft is a software development company...
  - ... but there are partners.

# Microsoft PPM

PPM



Program Management



Demand Management



Portfolio Analytics & Selection



Time Reporting



Issues & Risk Management



Business Intelligence & Reporting



Team Collaboration & Social



Financial Management




Resource Management



Schedule Management

# Microsoft PPM - Offerings

- Microsoft Project Standard
- Microsoft Project Professional
- Microsoft Project Server
- Project Online (Office365)



The image shows a tablet displaying the Microsoft Project Online interface. The screen displays a project dashboard with various charts, including a Gantt chart and a resource usage chart. The interface is clean and modern, with a blue and white color scheme. The tablet is placed on a desk with some papers and a pen nearby.

**Project Online**

Get started quickly with a flexible online solution for project portfolio management (PPM) and everyday work delivered through Office 365.

[See the video](#) ↗

**\$33.00** per user/month  
with annual subscription [Buy now](#)

Connect with a partner for a customized trial or proof of concept ⓘ [Find a partner](#)

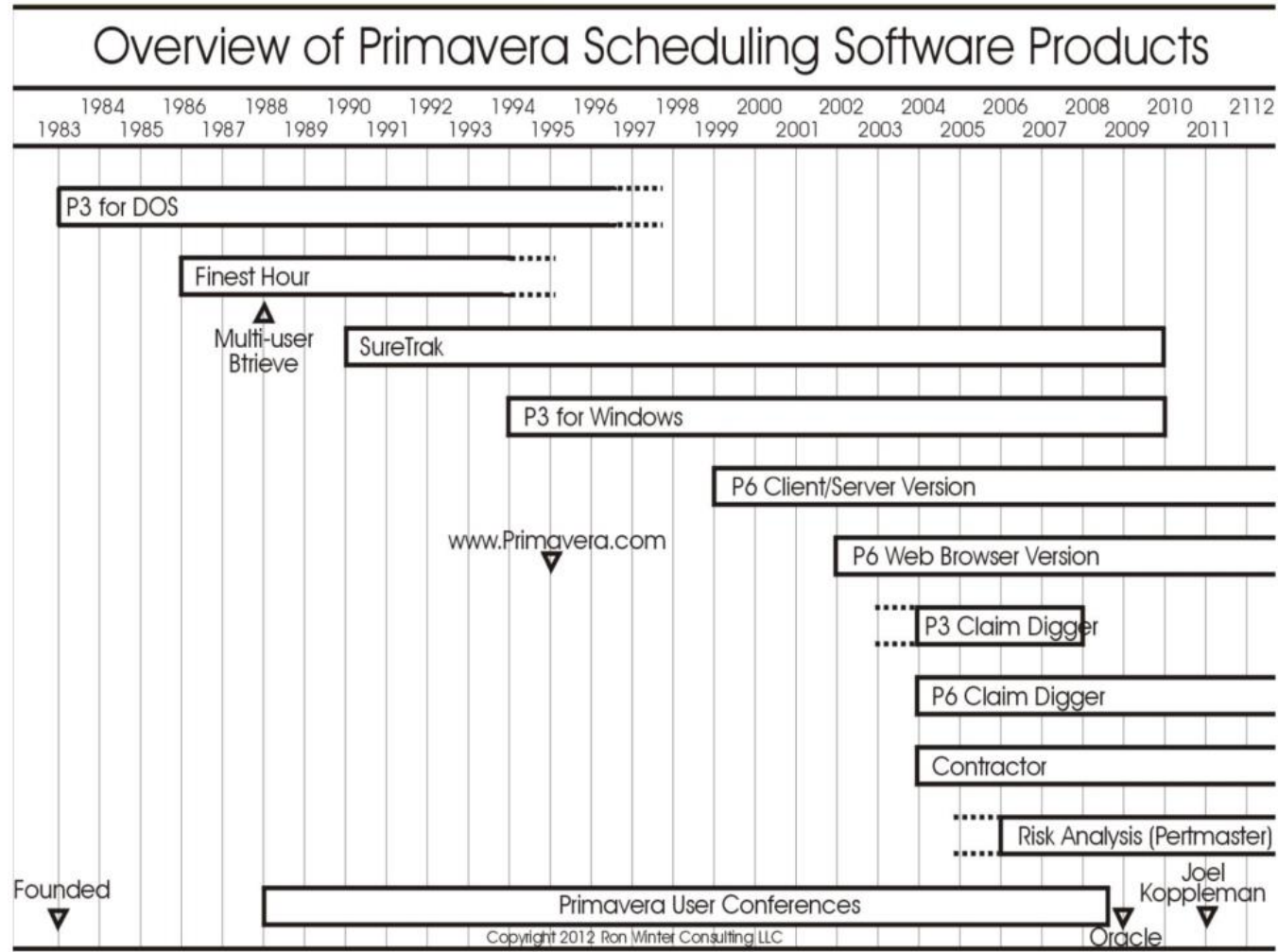
Take an interactive tour of Project Online [Take a tour](#)



# Oracle Primavera - History

- Primavera Systems, Inc. was founded on May 1, 1983
- Primavera acquisitions:
  - In 1999 Eagle Ray Software Systems
  - In 2003 Evolve Technologies
  - In 2006 ProSight and Pertmaster
- In 2008 Oracle acquired Primavera – now Primavera Global Business Unit (PGBU)
- P3 used to dominate the construction industry (25% in heavy construction companies and nearly 40% of general contractors with an annual revenue of \$5M-\$10M used P3)
- The use of P6 is not fully known
- P3 (first launched in 1983) stopped being sold in 2011 !

# Oracle Primavera - History



# Oracle Primavera - the Good

- Strong PPM vision, that comes from years of project portfolio management experience
- Strong clear verticals within the offerings (solutions)
- Role-based functionality (not just security on data) - Chief Information Officer, Capital Projects Executive, Operations Executive, Process Improvement Champion and PMO Director
- Appeals to large organisations (specially if using Oracle applications like ERP, People Soft, etc.)
- Instantis EnterpriseTrack can generate Microsoft PowerPoint slides with customer-specific visual templates for use as instant project status reports
- Range of different products
- Excellent feedback from clients and excellent experience in Oil & Gas, Manufacturing, Power Generation as well as Engineering and Construction.
- Built to support big project schedules (10,000s of lines)

# Oracle Primavera - the Bad

- Pricing - expensive
- Lag times in processing speed and in updating project records, and troublesome uploading of schedules and integration with Microsoft Project
- Variety of products, solutions and roles, can be overwhelming specially for organisations with low to medium PPM maturity.
- User interface easy to use, but old fashion. New generation buy-in is questionable.
- Limited partners ecosystem

# Oracle Primavera - the Ugly

- It's very big, expensive and requires a lot of investment in change.
- It's PPM first, software second.

# Oracle Primavera - Offerings

## ■ Products:

- **Primavera P6 Enterprise Project Portfolio Management:** Web-side that has rich in graphs, charts, pivot tables and dashboards.
- **Primavera Unifier:** Cloud based, similar to EPPM but with added models like; cost management, document management, fund management.. Etc.
- **Instantis EnterpriseTrack:** Cloud based for IT and business process leaders to improve strategy execution and financial performance through more effective work and resource management.
- **Primavera P6 Analytics:** Add-on for reporting
- **Primavera Gateway and Integration Products:** Add-on for integration
- **Oracle Primavera Prime Capital Plan Management:** Develop long-range capital plans and manage them by strategically responding to change, enabling operational success, and maximizing financial returns.
- **Primavera P6 Professional Project Management:** Windows-based project planning tool most of us are familiar with
- Primavera Portfolio Management: ?
- Primavera Risk Analysis: full lifecycle risk analytics solution, integrating cost and schedule risk management. Primavera Risk Analysis provides a comprehensive means of determining confidence levels for project success.

## Oracle Primavera Global Price List

	Monthly Subscription Fee	Metric	Minimum
<b>Products: P6 (Cloud Service)</b>			
Primavera P6 Enterprise Project Portfolio Management Cloud Service	125	Hosted Named User	200
Primavera P6 Analytics Cloud Service	90	Hosted Named User	25
Primavera P6 Progress Reporter Cloud Service	12	Hosted Named User	
Primavera P6 Enterprise Project Portfolio Management Web Services Cloud Service	20	Hosted Named User	
<b>Products: Unifier (Cloud Service)</b>			
Primavera Unifier Project Controls Cloud Service	150	Hosted Named User	25
Primavera Facility Management Cloud Service	80	Hosted Named User	25
Primavera Real Estate Management Cloud Service	80	Hosted Named User	25
Primavera Unifier Portal User Cloud Service	2	Hosted Named User	100
AutoVue 2D Professional Cloud Service	13	Hosted Named User	1
<b>Products: Primavera (Cloud Service)</b>			
Primavera Cloud Service Additional 1 GB Database Storage	10	Gigabyte	
Primavera Cloud Service Additional 1 GB File Storage	10	Gigabyte	
Primavera Cloud Service Additional Nonproduction Environment - Nonproduction Environment	10% of Monthly Subscription Fee	Nonproduction Environment	
<b>Products: Instantis (Cloud Service)</b>			
Instantis EnterpriseTrack Cloud Service	80	Hosted Named User	25
Instantis EnterpriseTrack Timesheets Cloud Service	17	Hosted Named User	25
Instantis Cloud Service Additional 1 GB File Storage	10	Gigabyte	
Instantis Cloud Service Additional Nonproduction Environment - Nonproduction Environment	10% of Monthly Subscription Fee	Nonproduction Environment	

Term licensing available for all Oracle Products. The list price for a term license is based on a specific percentage of the perpetual license price. Annual terms licenses are available from 1 to 5 years: 1 year - 20% of list; 2 year - 35% of list, 3 year - 50% of list, 4 year 60% of list and 5 year 70% of list.

The list support price for term licenses is 22% of the list perpetual license fee, as listed in the price list. The term license percentages are not applied to the list support price.

# Oracle Primavera - Offerings

- Solutions:
  - PPM Solutions for Capital Projects and Programs
  - PPM Solutions for IT
  - PPM Solutions for Project Manufacturing
  - PPM Solutions for Maintenance Operations Support
  - PPM Solutions for New Product Development
  - PPM Solutions for Enterprise PMO
  - PPM Solutions for Process Improvement (Six Sigma)



# Oracle Primavera - Offerings

<https://www.oracle.com/applications/primavera/index.html>

<https://www.youtube.com/user/oracleprimavera/videos>

# Primavera vs MS EPM

- Cost: Primavera is more expensive
- Ease of use and adoption: MS EPM is easier to adopt unless skills of using Primavera exist. MS EPM is an extension to MS Project (Office) and SharePoint.
- Embedded PPM Artefacts: Primavera has very clear verticals that come with methodologies, templates and best practices. MS EPM relies on Microsoft Partners ecosystem
- Integration: depends on the IT ecosystem of the organisation; MS EPM will integrate easily with other Microsoft products (SharePoint, SQL, Office, Dynamics, etc.,) while Primavera will integrate easily with Oracle products (Financials, PeopleSoft, etc.)
- PPM Methodologies: both MS EPM and Primavera can be configured to support any type of PPM methodology, however Primavera has a few more features than Microsoft Project Agile Product Development / IT Issue Tracking.

<http://www.slideshare.net/ccsspl/features-comparison-between-primavera-and-microsoft-project>

# CA Clarity - History

- CA was established in 1976
- In 2005 CA bought Niku Portfolio Manager for \$350M and renamed it to Clarity
- Now it is called CA PPM

# CA Clarity - the Good

- Strong presence in the PPM market, claims to have 1500 customers.
- Has moved 'successfully' - according to Gartner - to a SaaS / Cloud model.
- Continues improvement, based on customers feedback
- Agile functionality is strong / evident in the solution
- It can be deployed on Windows/Linux, SQL/Oracle
- Leader in the Integrated IT Portfolio Analysis **Applications**, in fact the only one from the PPM reviewed here.
  - It also tracks and manages IT service costs and uses this data to rationalise IT decisions affecting IT operations.

# CA Clarity - the Bad

- Expensive, The price of the on-premises version starts at around US\$125,000 for 100 users. Additional users can be added on a per-seat price. The CA Clarity PPM on-demand service starts at around \$50,000 per year, for 100 users. Additional users can be added on a per-seat basis. Then 20% maintenance, then implementation services.
- Mostly direct, limited partners ecosystem
- Some of its PPM capabilities are add-ons (at additional costs)
- Support can seem to take long and be bureaucratic
- Integration can be hard and costly
- Predicted to have the cloud architecture re-worked, which might possibly lead to service disruption and/or major changes
- When it comes IIPA, it lacks capability to have the graphical representation of data.

# CA Clarity - the Ugly

- Was not ranked as a leader in Gartner Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services for 2014.
- It's expensive
- More focus on financial the traditional Gantt / Project Schedule

# CA Clarity - Offerings

- Clarity PPM: Project Portfolio Management
- Clarity Playbook: for Strategy and Investment Planning
- Clarity Agile: for agile methodologies

<http://www.youtube.com/playlist?list=PLynEdQRJawmwfABu-i-XFrd1570MmEAml>

# Daptiv - History

- First cloud-based project management tool
- In 2010 — Parallax Capital Partners(Parallax), a software and technology acquisition firm acquired Seattle-based Daptiv



# Daptiv - the Good

- Leader on Gartner's Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services
- Relatively new but fast-growing users base
- Usability and configurability are reported to be very good
- Document management and collaboration functions are appealing
- Integrated with IBM Cognos, providing strong reporting flexibility
- Preferred partner for BMC Software for IT PPM in the cloud, which means better integration with BMC products.
- It can integrate with Rally and Jira for agile project management
- Very strong apps on iPhone and iPad
- Daptiv Connect, for integration with MS Dynamics, Oracle, SAP, Salesforce, etc.

# Daptiv - the Bad

- Still small
- Integrated with IBM Cognos, limits users to one reporting platform which requires skilling / learning.
- Limited Portfolio and Program management functionality
- Limited analysis on data
- Only cloud
- Resource Management is not integrated with Project Management

# Daptive - the Ugly

- It's small in terms of users and perceived as for small (maybe medium) size organisations
- More project management than Program and Portfolio Management

# Daptive - Offerings

- Daptiv PPM \$50 per user per month
- Daptiv Report Builder additional \$20 per user per month
- Daptiv Advanced Report Builder additional \$50 per user per month.

# AtTask - History

- Founded in 2001
- Re-writing of AtTask commenced in 2003 finished in 2006
- 2015 - AtTask was renamed: Workfront

# AtTask - the Good

- Leader on Gartner's Magic Quadrant for Cloud-Based IT Project and Portfolio Management Services
- Vision of managing work across the enterprise, not only projects – enterprise work management that includes Project Management
- Very strong on issue management, resolution and tracking.
- Very appealing to organisations with too many work 'tasks' with not enough time / people
- Focus on templates and solutions for specific types of users, like IT and Marketing
- User interface is quite appealing and easy to use

# AtTask - the Bad

- No advanced features for mature PMOs that manage programs and portfolios
- No support for top-down analysis and decision-making
- Seems specific for certain verticals (and not the others)
- Limited reporting capabilities (but enough for the type of users)
- For small organisations / teams
- Min 12 months contract
- Difficult to send / receive data to MS Project (or other scheduling tools)

# AtTask - the Ugly

- Small SaaS, which means competing with small Project Management SaaS (not portfolio and program), and there are lots of them and cheaper
- Only cloud



# AtTask - Offerings

- **WORK LICENSES: US\$30/user/month**
  - For team members who need robust work management, advanced capabilities, and greater flexibility. Includes all collaboration features, plus:
    - Manages work on the go with mobile apps for iPhone, Android and iPad
    - Track and submit timesheets
    - Create and complete work items
- **PLAN LICENSES: US\$60/user/month**
  - For team leaders who need comprehensive project, program and portfolio management with complete visibility and control. Includes all collaboration features, plus:
    - Create and manage projects from start to finish
    - Design and distribute status reports and create custom dashboards
    - Manage resources and capacity planning

# JIRA - History

- Atlassian is an Australian company founded in 2002 in Sydney

# JIRA - the Good

- Leader in Gartner Magic Quadrant for Application Development Life Cycle Management
- Known for its excellent issues and bugs management, resolution and tracking functions
- Great team management tool
- Effective and easy to use UI
- Text message notifications
- Very powerful support for agile software development
- Good customers base (mostly IT)
- Range of 3<sup>rd</sup> party plugins – Jira-Gantt, SharePoint connector, etc.
- Project management capability is strong for Agile
- Not expensive, starts from \$10/user

# JIRA - the Bad

- Project Management is secondary: it's really issues/bugs management solution
- It's actually not one product but a collection of products
- Support can be challenging

# JIRA - the Ugly

- It is not a PPM tool
- If you don't develop software, chances that JIRA is not for you

# JIRA - Offerings

## Packages

Already own JIRA? Try add-ons a-la-carte at [Atlassian Marketplace](#) »

### For projects

Issue tracking



\$10/mo

Free trial

### For development

Issue tracking and agile project management



\$20/mo

Free trial

### For service desk

Issue tracking and service requests



from \$20/mo

Free trial

# Other PPM

- Planview
- Innotas
  
- Wrike
- Basecamp

# Finally..

- EPM Partners offers trial for MS Project Online
  - 30 days 3 users
  - 1 day consulting

<http://www.epmpartners.com.au/microsoft-project-online-partner-led-trial/>



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