# **Project Online Foundations**

Statement of Work

Prepared for

Prepared by

Date: March 22,2020

Version: 2.1

# Table of contents

[**Introduction** 1](#_bookmark1)

1. [Project objectives and scope 1](#_bookmark2)
   1. [Objectives 1](#_bookmark3)
   2. [Areas in scope 1](#_bookmark4)
   3. [Areas out of scope 2](#_bookmark5)
2. [Project approach, timeline, and deliverable acceptance 4](#_bookmark6)
   1. [Approach 4](#_bookmark7)
   2. [Timeline 11](#_bookmark9)
   3. [Deliverable acceptance process 11](#_bookmark10)
   4. [Project governance 12](#_bookmark11)
   5. [Project completion 13](#_bookmark13)
3. [Project organization 13](#_bookmark14)
   1. [Project roles and responsibilities 13](#_bookmark15)
4. [Customer responsibilities and project assumptions 16](#_bookmark16)
   1. [Customer responsibilities 16](#_bookmark17)
   2. [General project assumptions 16](#_bookmark18)
   3. [Other assumptions 17](#_bookmark19)

This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order 7-VEH2MRXUM and describes the work to be performed (Services) by Microsoft (“us,” “we”) for (“Customer,” “you,” “your”) relating to Project Online Foundations (project).

This SOW and the associated Work Order expire 30 days after their publication date, unless signed by both parties or formally extended in writing by Microsoft.

# **Introduction**

The Project Online Foundations Offer includes a flexible solution for implementing project portfolio management that helps organizations get started, prioritize project portfolio investments, and deliver the intended business value. The Offer delivers a core set of activities for implementation that can be enhanced, with recommended practices across project intake and portfolio management, resource management, schedule management, issues management, and risk management.

# **Project objectives and scope**

## **Objectives**

The Project Online Foundations Offer is a 10-week-long Microsoft Services engagement that provides assessment, planning, configuration, engagement management, and a predictable approach for onboarding to Microsoft Project Online that uses the Microsoft Online Solutions Lifecycle delivery framework.

The objectives of this engagement are to:

* Assess your organization’s readiness to adopt project portfolio management (PPM) processes and

capabilities.

* Design and implement a foundational Project Online solution that helps your business processes to support your overall Microsoft PPM onboarding initiative.
* Provide the Customer with onsite functional, technical, and project management assistance that helps complete the Customer activities that are required for the transition to Project Online.

## **Areas in scope**

The Project Online Foundations components and scope are specified in the following tables. Microsoft will provide Services in support of the following scope.

|  |  |  |
| --- | --- | --- |
| **Area** | **Description** | **Assumptions** |
| Workshops | Delivery of 4 assessment workshops and 3 design workshops (see the [2.1.1](#_bookmark8) section for additional details) | The Customer will actively participate in the workshops in a timely manner. |

|  |  |  |
| --- | --- | --- |
| **Area** | **Description** | **Assumptions** |
| Solution design | Solution design for Project Online to meet specific business process requirements in the following areas:   * Enterprise custom fields * Up to 3 project detail pages * Enterprise project types * Enterprise resource metadata * Project Web App views | The Customer will actively participate in the planning process and provide the appropriate information needed to build out the solution design in a timely manner. |
| Project Online configuration | Configuration of Project Online according to the solution design | Project Online is available. |
| Knowledge transfer | Coaching and knowledge transfer necessary to support the transition to Project Online | The Customer will actively participate and provide the appropriate resources in a timely manner. |
| Remediation guidance | Recommendations for further activities that involve an extension of and migration to Project Online | The remediation activities are reviewed and finalized. |
| Process guidance | Microsoft Services will assist the Customer in defining recommended core processes and documentation in the following areas:   * Project intake and portfolio process design * Resource management process design * Schedule management process design | The Customer will actively participate in the planning process and provide the appropriate information needed to build out the core processes in a timely manner. |
| Power BI Project Online report app | Microsoft will deploy and configure the Power BI Project Online reporting and analytics application. | The Power BI service has been licensed and is available for app deployment. |

## **Areas out of scope**

Any area not explicitly included in the [This Statement of Work (SOW) and any exhibits, appendices,](#_bookmark0) [schedules, and attachments to it are made pursuant to Work Order 7-VEH2MRXUM and describes the](#_bookmark0) [work to be performed (Services) by Microsoft (“us,” “we”) for (“Customer,” “you,” “your”) relating to](#_bookmark0) [Project Online Foundations (project).](#_bookmark0)

[This SOW and the associated Work Order expire 30 days after their publication date, unless signed by](#_bookmark0) [both parties or formally extended in writing by Microsoft.](#_bookmark0)

# [**Introduction**](#_bookmark0)

[The Project Online Foundations Offer includes a flexible solution for implementing project portfolio](#_bookmark0) [management that helps organizations get started, prioritize project portfolio investments, and deliver the](#_bookmark0) [intended business value. The Offer delivers a core set of activities for implementation that can be](#_bookmark0) [enhanced, with recommended practices across project intake and portfolio management, resource](#_bookmark0) [management, schedule management, issues management, and risk management.](#_bookmark0)

# [**Project objectives and scope**](#_bookmark0)

## [**Objectives**](#_bookmark0)

[The Project Online Foundations Offer is a 10-week-long Microsoft Services engagement that provides](#_bookmark0) [assessment, planning, configuration, engagement management, and a predictable approach for](#_bookmark0) [onboarding to Microsoft Project Online that uses the Microsoft Online Solutions Lifecycle delivery](#_bookmark0) [framework.](#_bookmark0)

[The objectives of this engagement are to:](#_bookmark0)

* [Assess your organization’s readiness to adopt project portfolio management (PPM) processes and](#_bookmark0)

[capabilities.](#_bookmark0)

* [Design and implement a foundational Project Online solution that helps your business processes to support your overall Microsoft PPM onboarding initiative.](#_bookmark0)
* [Provide the Customer with onsite functional, technical, and project management assistance that helps complete the Customer activities that are required for the transition to Project Online.](#_bookmark0)

## [**Areas in scope**](#_bookmark0)

[The Project Online Foundations components and scope are specified in the following tables.](#_bookmark0) section is out of scope for Microsoft during this project. Areas out of scope for this project are listed in the following table.

|  |  |
| --- | --- |
| **Area** | **Description** |
| Customization | Modifications to the Project Online service beyond the configurable options are out of scope. |
| Processes and training | The following are out of scope:   * Management of user and organizational communications, documentation, training, and change management processes * Help-desk documentation and training |
| Customer documentation | Except as explicitly defined as in scope, producing Customer-specific reports, presentations, or meeting minutes, and architectural and technical documentation that is specific to the Customer is out of scope. |
| Customer prework | Prework that is required at the Customer site is out of scope. |

|  |  |
| --- | --- |
| **Area** | **Description** |
| Hardware and networking | Design, procurement, installation, and configuration of hardware and networking are out of scope. |
| Software | Procurement, installation, and configuration of software, except as explicitly defined as in scope, are out of scope. Configuration, packaging, and distribution of client software that is required for the Project Online service are out of scope. |
| Mobile devices | The following are not in scope:   * Management, configuration, and activation of mobile devices * Applying security policies on mobile devices |
| Configuration and testing | Implementation of network configuration, analysis, bandwidth validation, testing, and monitoring are out of scope. |
| Change management | The technical change management approval process and production of supporting documentation are out of scope. |
| Group policy settings | Rationalization and definition of group policy settings for user, workstation, and server management are out of scope. |
| Operations | Modification of a current operational model and operations guide is out of scope. |
| UX | Cobranding of Project Online user interfaces is out of scope. |
| Existing environments | Decommissioning and removal of on-premises environments are out of scope. |
| Test environment | Construction and maintenance of a Customer test environment are out of scope. |
| Software updates | Installation of service packs and any required updates on infrastructure servers is out of scope. |
| Third-party software | Integration with any third-party or other line-of-business (LOB) application or system, or data migration from any third-party or other LOB application or system is out of scope. |
| Product configuration | Configuration of any Project Online or Microsoft Office 365 functional capabilities not included as in scope (such as Microsoft Yammer, Microsoft Skype, or Microsoft OneDrive) is out of scope. Configuration of any Project Online functionality not explicitly stated as in scope (such as strategic portfolio analysis, timesheets, workflow, schedule templates, project site template customizations, custom security model, or Business Intelligence Center reports) is out of scope. |

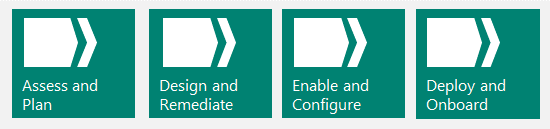
|  |  |
| --- | --- |
| **Area** | **Description** |
| Other process design | Process definition or design except as explicitly stated as in scope is out of scope. |
| Custom reporting | No customized reports will be created for this engagement. |

# **Project approach, timeline, and deliverable acceptance**

## **Approach**

During the engagement, the Microsoft Services delivery team will help with functional, process, technical, and PPM operations guidance assistance while working alongside the Customer to complete the overall Project Online onboarding initiative.

The project will be structured following the Microsoft solution delivery methodology across four distinct phases: Assess and Plan; Design and Remediate; Enable and Configure; and Deploy and Onboard. Each phase has distinct activities and deliverables that are described in the following sections.

If a deliverable requires formal review and acceptance (a process described in the [Deliverable acceptance](#_bookmark10) [process](#_bookmark10) section), this is indicated in the following sections.

### **Engagement initiation**

Before beginning the project, the following prerequisites must be completed.

|  |  |
| --- | --- |
| **Engagement initiation** | |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | Distribute a pre-assessment questionnaire to the Customer at least 5 days prior to the engagement kickoff. |
| **Customer activities**  The activities to be performed by the Customer | * Complete the pre-assessment questionnaire and return it to the Microsoft team prior to the kickoff meeting. * Identify and provide a dedicated solution application administrator. * Provide project manager or program manager resources who can coordinate and manage the enablement activities. |

### **Assess and Plan**

During the Assess and Plan phase, the team conducts a detailed discovery and assessment of your PPM environment through several workshops. The Assess and plan phase ends when the Services remediation plan or checklist is delivered. This milestone indicates that the team understands what remediation is required to bring the vision to reality.

|  |  |
| --- | --- |
| **Assess and Plan phase – 15 days** | |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | Microsoft Services will:   * Participate in the project kickoff meeting to align the Customer’s Project Online deployment program with the Customer’s key business and technical requirements. * Lead the assessment workshops:   + PPM Readiness and Maturity Review workshop   + Project Intake and Portfolio Design Workshop   + Resource Management Design Workshop   + Schedule Management Design Workshop * Document the remediation and on-premises configuration requirements for the Project Online deployment program. * Work with the Customer to prioritize, assign, and plan the remediation activities required for the Project Online deployment services. |
| **Customer activities**  The activities to be performed by the Customer | * Provide resources to participate in the project kickoff and assessment workshops. * Provide information to Microsoft teams that can lead to improved alignment with overall Project Online onboarding activities. |
| **Key assumptions** | * All assessment workshops will be scheduled during the first week of the engagement. * The PPM Assessment Findings and Enablement Plan will provide overall approach but not design level specifications. |
| **Exit criteria** | * The assessment workshops have been completed. * The PPM Assessment Findings and Enablement Plan has been delivered. |

**Deliverables**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Acceptance required?** | **Responsibility** |
| PPM Assessment Findings and Enablement Plan | Incudes an assessment of the Customer’s project management and PPM maturity and PPM readiness, data remediation requirements, and implementation approach for Project Online service usage. It also includes a list of Customer- owned activities that are required to address any items for effective Project Online implementation. | No | Microsoft |

* + 1. **Design and Remediate**

During the Design and Remediate phase, the Customer will complete activities identified during the Assess phase and prepare for the Enable phase.

|  |  |
| --- | --- |
| **Design and Remediate phase – 15 days** | |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | Microsoft Services will:   * Provision user subscriptions and verify user access to Project Online. * Configure the enterprise resource planning (ERP) sync. * Create the first project. * Design recommended processes in the PPM focus areas identified as in scope based on recommended practices and technology alignment. * Define and document these processes to support the Project Online solution based on the Microsoft Services assessment of the Customer's organizational and PPM maturity. * Conduct configuration design workshops and sessions:   + Project Intake and Portfolio Design Workshop   + Resource Management Design Workshop   + Schedule Management Design Workshop * Work with the Customer to complete remediation requirements for the Project Online enablement and onboarding initiative. * Create a solution design for Project Online to meet specific business process requirements in the following areas:   + Up to 10 enterprise project custom fields   + Up to 3 project detail pages   + Up to 3 enterprise project types |

|  |  |
| --- | --- |
| **Design and Remediate phase – 15 days** | |
| **Category** | **Description** |
|  | * Up to 5 enterprise resource custom fields * Up to 5 Project Web App views * Prepare and deliver a configuration design document. * Conduct a configuration design review. |
| **Customer activities**  The activities to be performed by the Customer | * Provide subject matter experts who have technical and business knowledge of the Customer environment. * Provide a key point of contact for each in-scope PPM design focus area. * Participate in process design interviews and workshops. * Review recommended processes. * Drive process adoption. * Make decisions about the solution design. * Allocate availability of the Office 365 administrator and application administrator to work on enablement activities. * Allocate availability of the Project Online administrator to participate in solution design workshops. * Implement remediation activities by making changes to source data, including portfolio metadata and the project schedules as defined in the implementation plan. |
| **Key assumptions** | * The Customer will verify that resources are available to participate in the design interviews and workshops. * Design Workshops will take place over a 4-day period. Microsoft will use existing Customer PPM and project management processes as input to the solution design. If documented processes do not exist, enhanced implementation services will be required. * 1 instance of a Project Online Project Web App site collection will be created. * The Customer has identified and made available a Microsoft Office 365 administrator. * The Customer has identified and made available a Project Online application administrator. * Recommended process design will be limited only to those areas specifically related to the Project Online solution. * Recommended process definition and design must be completed prior to configuration design. * The Customer is responsible for all process adoption and change management activities. * The Customer is responsible for all data and data remediation activities. |

|  |  |
| --- | --- |
| **Design and Remediate phase – 15 days** | |
| **Category** | **Description** |
| **Exit criteria** | * The solution design has been mutually agreed upon. * The remediation checklist necessary for enablement has been completed by the Customer. * The recommended process documentation has been delivered. |

**Deliverables**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Acceptance required?** | **Responsibility** |
| PPM process documentation | Details the necessary processes for effective use of the Project Online service and includes Microsoft Visio diagrams or other representations of processes related to project management and PPM data management processes and procedures | No | Microsoft |
| Configuration design document | A document outlining the configuration of the solution | No | Microsoft |
| Project Online Project Web App | The Project Online Project Web App site collection has been provisioned and the Project Web App administrator can log on to Project Online. | Yes | Microsoft |
| Enterprise resource pool | The Project Web App ERP has been populated using the Active Directory ERP Sync with Microsoft Azure Active Directory. | Yes | Microsoft |
| Project creation | A project has been created in the Project Web App. | Yes | Microsoft |

* + 1. **Enable and Configure**

During the Enable phase, the team refines the baseline design created in the Assess phase and works to configure a Project Online solution to meet the business requirements.

|  |  |
| --- | --- |
| **Enable and Configure phase – 5 days** | |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | Microsoft Services will:   * Configure the Project Online solution to meet business requirements based on the solution design. Configuration items will include:   + Project Server permissions mode.   + Resource pool metadata and population.   + Enterprise custom fields.   + Project detail pages.   + Enterprise project types.   + Project Web App views and a portfolio dashboard. * Conduct a configuration review. * Implement and configure the Power BI Project Online reporting and analytics application. |
| **Customer activities**  The activities to be performed by the Customer | * Identify and provide a dedicated solution application administrator. * Provide project manager or program manager resources who can coordinate and manage the implementation activities. * Participate in configuration review. |
| **Key assumptions** | * The Project Online service was successfully provisioned in the Remediate phase. * The core enablement of Project Web App configuration activities will be completed within a 5-day period. * The coaching and knowledge transfer activities conducted by Microsoft will be completed within a 6-day period. |
| **Exit criteria** | The solution configuration is completed and reviewed. |

**Deliverables**

|  |  |  |  |
| --- | --- | --- | --- |
| **Name** | **Description** | **Acceptance required?** | **Responsibility** |
| Solution configuration | The Project Online solution has been configured based on the configuration design document. A configuration review with the Customer has also been completed. | No | Microsoft |

* + 1. **Deploy and Onboard**

During the Deploy phase, the team refines the baseline design created in the Assess phase and works to configure a Project Online solution to meet the business requirements.

|  |  |
| --- | --- |
| **Deploy and Onboard phase – 10 days** | |
| **Category** | **Description** |
| **Microsoft activities**  The activities to be performed by Microsoft | Microsoft Services will:   * Provide 5 days of knowledge transfer and technical assistance for Customer activities to support implementation of the Project Online solution in the following areas:   + Project intake.   + Schedule management.   + Resource management.   + Problem and risk management.   + Project management organization (PMO) support including reporting and analysis.   + Solution application administration. * Provide 5 days of scheduling support.   Training during this engagement is limited to informal knowledge transfer—defined as Customer employees, associates, or contractors working side-by-side with Microsoft personnel. No formal deliverables or meeting summaries will be provided for these sessions or activities. |
| **Customer activities**  The activities to be performed by the Customer | * Provide project manager or program manager resources who can coordinate and manage the knowledge transfer session scheduling and related activities. * Participate in knowledge transfer sessions. * Facilitate the change management process. * Review recommendations for extension of Project Online capabilities. |
| **Key assumptions** | PMO, project managers, and other key stakeholders are available and participating in knowledge transfer and onboarding sessions. |
| **Exit criteria** | The Project Online service has been successfully provisioned. |

## **Timeline**

It is estimated that this engagement will be performed over a period of 10 weeks, according to the following timeline, and will include the phases and milestones noted. The actual timeline for this engagement will be relative to the project start date, and all dates and durations provided are estimates only.

Assess and Plan

3 weeks

Design and

Remediate

3 weeks

Enable and

Configure

1 week

Deploy and

Onboard

2 weeks

## **Deliverable acceptance process**

During the project, Microsoft will submit certain deliverables (listed in the [Approach](#_bookmark7) section as

deliverables with “Acceptance required?” equal to “Yes”) for the Customer’s review and approval.

Within three business days of the date of submittal, the Customer is required to:

* **Accept the deliverable** by signing, dating, and returning a service deliverable acceptance form, which can be sent by email, or by using (or partially using) the deliverable.

Or

* **Reject the deliverable** by notifying Microsoft in writing; the Customer must include a complete list of reasons for rejection.

Deliverables shall be deemed accepted unless the written rejection notification is received by Microsoft in the timeframe specified.

If a rejection notification is received, Microsoft will correct problems with a deliverable that are in scope for the project (and documented in this SOW), after which the deliverable is deemed accepted.

Problems that are outside the scope of this SOW, and feedback provided after a deliverable has been accepted will be addressed as a change request, managed as described in the [Change management](#_bookmark12) [process](#_bookmark12) section.

## **Project governance**

The governance structure and processes the team will adhere to for the project are described in the following sections:

### **Project communication**

The following will be used to communicate during the project:

* **Communication plan**: this document will describe the frequency, audience, and content of communication with the team and stakeholders. It will be developed by Microsoft and the Customer as part of project planning.
* **Status reports**: the Microsoft team will prepare and issue regular status reports to project stakeholders per the frequency defined in the communication plan.
* **Status meetings**: the Microsoft team will schedule regular status meetings to review the overall project status, the acceptance of deliverables, and review open problems and risks.

### **Risk and issue management**

The following general procedure will be used to manage active project issues and risks:

* **Identify**: identify and document project issues (current problems) and risks (potential problems that could affect the project).
* **Analyze and prioritize**: assess the potential impact and determine the highest-priority risks and problems that will be actively managed.
* **Plan and schedule**: determine the strategy for managing priority risks and issues and identify a resource who can take responsibility for mitigation and remediation.
* **Track and report**: monitor and report the status of risks and problems.
* **Escalate**: escalate to project sponsors the high impact problems and risks that the team is unable to resolve.
* **Control**: review the effectiveness of risk and issue management actions. Active problems and risks will be regularly monitored during the project.

### **Change management process**

During the project, either party is able to request modifications to the Services described in this SOW. These changes only take effect when the proposed change is agreed upon by both parties. The change management process steps are:

* **The change is documented**: All change requests will be documented by Microsoft in a Microsoft change request form and submitted to the Customer. The change request form includes:
  + A description of the change.
  + The estimated effect of implementing the change.
* **The change is submitted**: The change request form will be provided to the Customer.
* **The change is accepted or rejected**: The Customer has three business days to confirm the following to Microsoft:
  + Acceptance—the Customer must sign and return change request form.
  + Rejection—if the Customer does not want to proceed with the change or does not provide an approval within three business days, no changes will be performed.

### **Executive steering committee**

The executive steering committee provides overall senior management oversight and strategic direction for the project. The executive steering committee for the project will meet per the frequency defined in the communication plan and will include the roles listed in the following table. The responsibilities for the committee include:

* Making decisions about project strategic direction.
* Serving as a final arbiter of project problems.
* Approving significant change requests.

|  |  |
| --- | --- |
| **Role** | **Organization** |
| Project sponsor | Customer |
| Delivery manager | Microsoft |

### **Escalation path**

The Microsoft project manager will work closely with the Customer project manager, sponsor, and other designees to manage project problems, risks, and change requests as described previously. The Customer

will provide reasonable access to the sponsor or sponsors in order to expedite resolution. The standard escalation path for review, approval, or dispute resolution is as follows:

* Project team member (Microsoft or the Customer)
* Project manager (Microsoft and the Customer)
* Microsoft project oversight manager or Customer project sponsor
* Executive steering committee

## **Project completion**

The project will be considered complete when at least one of the following conditions is met:

* All Microsoft deliverables that require acceptance have been delivered and accepted (or deemed accepted).
* The Work Order has been terminated.

# **Project organization**

## **Project roles and responsibilities**

The key project roles and the responsibilities are as follows.

**Customer roles**

The key project roles and the responsibilities are listed in the following table. These roles represent key functional areas for successful implementation of the Microsoft PPM. However, some organizations may combine or consolidate these areas depending their staffing model.

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| Customer executive sponsor | * Make key project decisions. * Serve as an escalation point for unresolved problems and clear project roadblocks. * Confirm that the proper funding and support are provided for the success of the project. * Act as the overall escalation point for change and issue management. * Act as an advocate for user and internal communications. |
| Customer project manager | * Function as the primary point of contact for the Microsoft team for each assigned work stream. * Manage and coordinate the overall project. * Take responsibility for resource allocation, risk management, project priorities, and communication to management. * Manage day-to-day project activities. * Manage the project risks and problems register. * Coordinate team activities to provide deliverables according to the project schedule. * Create the end-user communications plan. * Organize training. |

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| Client Office 365 administrator | * Participate in workshop discussions and drive activities that address client configuration for online service consumption. * Help the Microsoft team complete the enablement activities. |
| Communications and training lead | * Take responsibility for Customer communications related to the move to Project Online. * Identify and plan Customer training requirements related to the move to Project Online. |
| PMO lead | * Take responsibility for defining business requirements, understanding implications of configuration options, and making directional decisions. * Participate in workshop discussions and take responsibility for directory- related activities including acquisition and configuration of required hardware and implementation of the user-provisioning approach. |
| Project Online application administrator | * Develop expertise and technical knowledge of the application within the organizational project and portfolio management context. * Partner with Microsoft Services on configuration design and implementation. * Engage with Microsoft Services to realize knowledge transfer. * Seek and obtain additional technical knowledge and education through written and media-based training. |
| Project portfolio analyst | * Participate in workshop discussions. * Understand the capabilities of Project Online and how to derive value from PPM data such as resource capacity management, strategic portfolio, financial, and other data. |
| Microsoft SharePoint lead | * Take responsibility for the Office 365 collaboration infrastructure. * Participate in workshop discussions and take responsibility for activities that address SharePoint readiness, including installation and implementation of SharePoint environment discovery tools, if necessary. |
| Security lead | * Participate in workshop discussions and drive activities that address client configuration for online service consumption. * Assist the Microsoft team in implementing the security-related implementation activities. |
| Service lead | Take responsibility for required Microsoft Project desktop deployments. |

**Microsoft roles**

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| Executive sponsor | Act as a Microsoft Services Customer advocate. |

|  |  |
| --- | --- |
| **Role** | **Responsibilities** |
| Delivery manager | * Manage and coordinate the overall Microsoft project * Serve as a single point of contact for escalations, billing problems, personnel matters, and contract extensions. |
| Project manager | * Facilitate project governance activities. * Serve as a single point of contact for the Microsoft Services project status. * Manage and coordinate Microsoft project delivery. * Provide a weekly status report and prepare and lead 1 status meeting per week of no more than 1 hour in duration. * Take responsibility for issue and risk management, change management, project priorities, weekly status communications, and weekly status meetings. * Coordinate Microsoft Services resources and partners subcontracted to Microsoft Services; this includes staffing, task assignments, and status reporting. |
| PPM solution architect | * Provide technical and architectural oversight for the overall Project Online onboarding initiative. * Provide subject matter expertise for complex configuration requirements that are related to the Project Online enablement. |
| PPM consultant | * Participate in workshop discussions and contribute to the Customer remediation checklist and implementation plan. * Complete and deliver the remediation checklist to the Customer to facilitate service consumption. * Provide technical and functional subject matter expertise that can be used to complete remediation activities. * Implement the configuration that is required for Project Online Services. |

1. **Customer responsibilities and project assumptions**
   1. **Customer responsibilities**

In addition to Customer activities defined in the [Approach](#_bookmark7) section, the Customer is also required to:

* Provide information.
  + This includes accurate, timely (within three business days or as mutually agreed upon), and complete information.
* Provide access to people and resources.
  + This includes access to knowledgeable Customer personnel, including business user representatives, and access to funding if additional budget is needed to deliver project scope.
* Provide access to systems.
  + This includes access to all necessary Customer work locations, networks, systems, and applications (remote and onsite).
  + This includes necessary Customer work sites, systems logons and passwords, and material and resources as needed and as advised by us in advance.
  + This includes access—with proper licenses—to the tools and third-party products that the Microsoft team needs to complete its assigned tasks.
  + Acquire and install the appropriate server capacity that is required to support the environments as defined in the in-scope section of this SOW.
* Provide a work environment.
  + This consists of suitable work spaces, including desks, chairs, and Internet access.
* Manage non-Microsoft resources.
  + The Customer will assume responsibility for the management of all Customer personnel and vendors who are not managed by Microsoft.
* Manage external dependencies.
  + The Customer will facilitate any interactions with related projects or programs in order to manage external project dependencies.

## **General project assumptions**

The project scope, Services, fees, timeline, and our detailed solution are based on the information provided by the Customer to date. During the project, the information and assumptions in this SOW will be validated, and if a material difference is present, this could result in Microsoft initiating a change request to cover additional work or extend the project duration. In addition, the following assumptions have been made:

* General:
  + In performing Services under this SOW and the applicable Work Order, Microsoft will rely upon any instructions, authorizations, approvals, or other information provided by the Customer project manager or personnel duly designated by the Customer project manager.
  + Throughout the project, Microsoft will submit requests for decisions or feedback for the Customer to complete. Decisions are assigned due dates, and it is assumed that the Customer will provide the required feedback or make decisions on either the due date agreed upon or within three business days of submittal. If a decision or feedback is not provided by the due date or within three business days, it will be addressed as a potential change of scope pursuant to the change management process outlined in this SOW.
* Work day:
  + The standard work day for the Microsoft project team is between 9 AM and 6 PM, Monday through Thursday.
  + Resources might stretch their daily work plan in order to accommodate the project's weekly activities within those four days.
* Standard holidays:
  + Observance of consultants’ country-of-residence holidays is assumed and has been factored into the project timeline.
* Remote working:
  + As needed, resources might perform project activities by working remotely on Fridays.
* Language:
  + All project communications and documentation will be in English. Local language support and translations will be provided by the Customer.
* Staffing:
  + If necessary, Microsoft will make staffing changes. These can include, but are not limited to, the number of resources, individuals, and project roles.
  + Microsoft offshore resources and Microsoft’s offshore subcontractors will perform work remotely from Microsoft India facilities or Microsoft partner facilities. The Customer is expected to provide the Microsoft offshore team with virtual private network (VPN) access to the various environments being deployed at the start of the engagement.
* Informal knowledge transfer:
  + Customer staff members who work alongside Microsoft staff will be provided with information knowledge transfer throughout the project. No formal training materials will be developed or delivered as part of this informal knowledge transfer.

## **Other assumptions**

* Project Online enablement assumes that the Customer has obtained and deployed the Office 365 service.
* The Customer is responsible for procuring all required Project Online subscriptions.
* This SOW assumes that there are no migration activities associated with any existing Project Server, Project Online, or third-party PPM solution.
* Reporting is limited to the Power BI Project Online reporting and analytics application only. SQL, SSRS, Excel Services, and other reporting applications will not be configured or deployed.