# 

Statement of Work

Project Online Assistance

Prepared for

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This Statement of Work (SOW) and any exhibits, appendices, schedules, and attachments to it are made pursuant to Work Order **7-V673FQZFL** and describes the work to be performed (Services) by Microsoft (“us,” “we”) for (“Customer,” “you,” “your”) relating to **Project Online Assistance** (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

is one of the leading system integrator for business operations of many customers in the market (like , SORGENIA, ENEL, etc.) and, in this area, provide personal productivity and enterprise project management solutions based on Microsoft technology platforms.

Within this scenario, Project Online is being adopted as a central entity for all customer’s business projects, as a common tool to define a life cycle monitoring model of ICT initiatives, through the implementation and adoption of an integrated PowerBI solutions for real-time tracking and reporting of the status of ongoing projects, resource productivity and points of focus for each project (both operationally and directionally).

As part of this agreement, Microsoft will provide project online technical assistance and services to support in evolving a customer’s system ().

# Project objectives and scope

## Objectives

The Project Online Foundations Offer is a 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 |
| --- | --- | --- |
| Solution design | Solution design for Project Online to meet specific business process requirements in the following areas:   * **Implementation Authorization Workflow and Approval Gates**  1. Stage Structure & Gate at least 2 x Phase [#12] 2. WF with 6 gates and 3 exits [#18]  * **Power BI enhancements** (see the Approach section for additional details) to satisfy the follow requests:   1. Integrated business cost information management   2. Data synchronization to other business systems   3. Reporting Dashboard Enhancement * **New design Entrprise Projerct Types**   o Agile  o Fast activities  o Recurring   * **Prod and Test Environments Alignment** | 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. |
| Remediation guidance | Recommendations for further activities that involve an extension of and migration to Project Online | The remediation activities are reviewed and finalized. |
| 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. |
| Workshops | Delivery of **3 advanced workshops** (see the Approach section for additional details) | The Customer will actively participate in the workshops in a timely manner. |

## Areas out of scope

Any area not explicitly included in the Areas in scope 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  Except for the training workshop described in the table of section “2.1.4. Enable and Configure” |
| 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. |
| 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. |
| 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. |

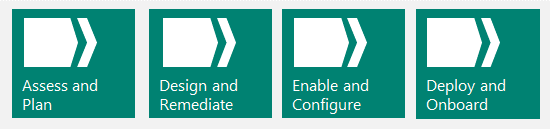
# Project approach, timeline, and deliverable acceptance

## 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 process 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 | * Organize the project kick-off | |
| **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 enablement activities. |

### Assess and Plan

During the Assess and Plan phase, the team conducts a detailed discovery and assessment of your PPM environment. 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 | |
| --- | --- |
| 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.   * 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 information to Microsoft teams that can lead to improved alignment with overall Project Online onboarding activities. |

### 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 | |
| --- | --- |
| Category | Description |
| **Microsoft activities** The activities to be performed by Microsoft | Microsoft Services will:  Create a solution design for Project Online to meet specific business process requirements in the following areas:   * + **Implementation Authorization Workflows and Approval Gates**     - Two WFs are expected to be built:   1. A first WF will allow the management of the lifecycle of the “**Scheda Esigenza**” until its final approvals before turning into a project.  The WF will be structured on 3 main phases (P1, P2 and P3), structured in detail steps  2. A second WF will handle **Project** lifecycle.  The WF will be structured on 3 main phases (P4, P5 and P6), structured in in detail steps  The phase steps will be managed through **SharePoint approval tasks**.  The separation of the two WF, allows you to support the following cases:   * + - * The inclusion of one “Scheda Esigenza” and the development of one single project compared to one “Scheda Esigenza”       * The inclusion of one “Scheda Esigenza” and the development of multiple projects compared to one “Scheda Esigenza”   In all cases, the code of “Scheda Esigenza” will become an attribute on the Project tab.   * + **New Enterprise Project Types**   It is planned to build 3 more Enterprise Project Types within the platform. These EPTs can be associated with very simple or even managed WF.  The types identified to date are as follows:  a. Agile  b. Fast activities  c. Recurring |
| **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 * 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. * 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.   * 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. |
| **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 |
| --- | --- | --- | --- |
| Configuration design document | A document outlining the configuration of the solution | No | Microsoft |

### 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 | |
| --- | --- |
| 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.  Conduct a configuration review.  Implement and configure the Power BI Project Online reporting and analytics application.  **Power BI enhancements** activity is planned to:   * + **support the customer to the analysis** of Integrated business cost information management and data synchronization to other business systems   + propose our **approach of the solution**: at this stage, there is no planned data import into the online project database. Instead, it is planned to integrate project cost information through the merger (into Power BI) of the data from the POL platform with data from ad hoc extractions from SAP or other business systems. These data will be shared and updated on document library SharePoint, so that the BI upgrade takes place through the simple upgrade of the BI extractions in csv or excel format.   This activity includes also:   * + - #1 csv file synchronizing with the data model of Power BI     - #1 dashboard development based on the csv file mentioned above * Delivery of **3 advanced workshops** (of 4h each one) where will be described the new project lifecycle trough the project workflow implemented on above phase |
| **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. |
| **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 |

### 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 – 15 days** | |
| --- | --- |
| **Category** | **Description** |
| **Microsoft activities** The activities to be performed by Microsoft | Microsoft Services will provide:   * **Production and Test Environment Alignment**   It is planned to create a Test Project Online environment to be used for all development and simulation before bringing evolutionary features and CRs into a developing environment  Production.  Aligning the Test environment involves the following tasks:  Configuring the PWA:   * EPT * Custom fields * Permissions and groups * Defined WF * Templates and master data |
| **Customer activities** The activities to be performed by the Customer | Facilitate the change management process.  Review recommendations for extension of Project Online capabilities. |
| **Exit criteria** | The Project Online service has been successfully provisioned. |

## Timeline

It is estimated that this engagement will be performed over a period of 9 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.

## Deliverable acceptance process

Microsoft will not provide any formal deliverable that requires an acceptance process.

## 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.

### 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

## Project completion

Microsoft will provide Services defined in this SOW to the extent of the fees available and the term specified in the Work Order. If additional services are required, the change management process will be followed and the contract modified. The project will be considered complete when at least one of the following conditions has been met:

* All fees available have been utilized for Services delivered and expenses incurred.
* The term of the project has expired.
* All Microsoft activities and in-scope items have been completed.
* 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 inl 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. |
| Client Office 365 administrator | 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. |
| 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. |
| Microsoft SharePoint lead | Take responsibility for the Office 365 collaboration infrastructure. |
| Security lead | 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. |
| 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 | 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. |

# Customer responsibilities and project assumptions

## Customer responsibilities

In addition to Customer activities defined in the Approach 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 exl dependencies.
  + The Customer will facilitate any interactions with related projects or programs in order to manage exl 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 or Italian (if available). 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.