

PM Software Evaluation and Selection Process

November 23, 2010



Project Summary

The Department of Administrative Services, Information Technology (IT) Services Applications group is responsible for providing application and web development services to divisions within DAS, boards and commissions, and the Governor's Office. IT Services is comprised of 15 developers and 1 business analyst. Currently, IT Services has over 12 active projects, 8 project charters awaiting signature, and in excess of 30 web sites or applications that they support. IT Services has no dedicated project manager.

IT Services currently utilizes network drives, SharePoint, a custom time tracking application and a shared custom help desk application to track tasks, projects, and documentation. None of the applications currently in use by the group can be considered a project management solution. IT Services finds it increasingly difficult to accurately provide quotes, schedule resources, track task completion, and complete projects on time. In addition, there is no single application that can be reviewed to determine current projects, status of those projects, amount of time a team member has spent working on a task, or project progress against the schedule.

Project Goal

Project Management Software Comparison and Recommendation

- Comparison of ten project management software packages against customer criteria.
- Recommendation of three software packages that meet or exceed the needs of the project sponsor.

Implementation Plan

Project Management Software Implementation Plan that can be used to implement the project sponsor's project management software selection. The plan includes hardware, installation, and training considerations.

Each Project Management software solution will be evaluated based on the following criteria:

- Is the software available from an Ohio based Vendor?
- If software is not available from an Ohio based vendor, is the vendor a US based vendor?
- Is the software available on State of Ohio State Term Schedule?
- Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?
- From what vendor(s) can the software be procured?
- What is the cost of the project management solution?
- What is newest release (version)?
- What are the initial licensing fees?
- Are there on-going licensing fees?
- What number of users does the system support?
- Does the software require maintenance fees?
- Does the software allow source code ownership? Is the software open-source?
- What hardware is required to support the software?
- What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? What is unique from other solutions?
- Does the software offer employee time tracking functionality?
- Does the software offer issue tracking functionality?
- Does the software offer out of the box reporting? If so, describe.
- What type of security does the software offer? Does it allow multiple levels of security? Does it integrate with Active Directory? (Internal and External users)
- Does the vendor offer training with initial procurement? If so, what kind of training? Are their training manuals or job aids available?
- Have we identified other State of Ohio agencies using this software?
- If so, have we talked with this agency regarding advantages and disadvantages?
- Is the software web-based?

Project Benefits

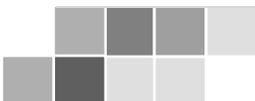
IT Services desires to procure a project management solution that will also track employee time against tasks as well as serve as a issue tracking system. Initially, only the project management component of the solution will be implemented. The issue tracking functionality of the application will be implemented at a later time.

With implementation of a project management solution, IT Services will be able to strategically align resources with current projects and be able to better forecast, quote, and schedule future projects based on historical information that will begin to accumulate once a project management solution is implemented. IT Services will be able to streamline and create more efficient business practices that can support the customer base. The solution will also provide better visibility of projects and their current status to IT Services customer's through the project management software's reporting functionality.

Project Team

For more information about this project, contact team members

- Crystal Beacom – Crystal.Becom@dot.ohio.gov
- Felecia Jackson – Felecia.Jackson@com.ohio.gov
- Cheryl Reed – Cheryl.Reed@das.ohio.gov
- Erika Sowry – Erika.Sowry@oit.ohio.gov
- Dan Sowry – Dan.Sowry@epa.ohio.gov
- Project Management Coach: Nelson Gonzalez



Project Management Software Evaluation, Recommendation and Implementation Plan



Crystal Beacom
Felecia Jackson
Cheryl Reed
Dan Sowry
Erika Sowry

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About this Document

This software evaluation and recommendation document is a compilation of research performed by the PM Wise Project Team as a part of the Department of Administrative Services (DAS), Human Resources Division's Project Management class. The project was completed for the Department of Administrative Services, Information Technology (IT) Services Applications group. This document includes background information and objectives for the project along with project management software research, analysis, evaluations, software scoring and a team recommendation of three project management software solution.

Project Background

The Department of Administrative Services, Information Technology (IT) Services Applications group is responsible for providing application and web development services to divisions within DAS, boards and commissions, and the Governor's Office. IT Services is comprised of 15 developers and 1 business analyst. Currently, IT Services has over 12 active projects, 8 project charters awaiting signature, and in excess of 30 web sites or applications that they support. IT Services has no dedicated project manager.

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IT Services desires to procure a project management solution that will also track employee time against tasks as well as serve as a issue tracking system. Initially, only the project management component of the solution will be implemented. The issue tracking functionality of the application will be implemented at a later time.

With implementation of a project management solution, IT Services will be able to strategically align resources with current projects and be able to better forecast, quote, and schedule future projects based on historical information that will begin to accumulate once a project management solution is implemented. IT Services will be able to streamline and create more efficient business practices that can support the customer base. The solution will also provide better visibility of projects and their current status to IT Services customer's through the project management software's reporting functionality.

IT Services has limited budget funds to procure a project management solution. Before moving forward, the group requires a comparison of project management solutions to determine what software will best fit the needs of the group.

Project Objectives

The project objective is to compare ten project management software solutions against the customer's selection criteria, provide recommendation of the top three project management software solutions that meet or exceed the customers needs and provide a Project Management Software Implementation Plan that can be used to implement the project sponsor's project management software selection.

Project Approach

Ten software packages were chosen for review based upon interviews with the project sponsor, industry recommendations, DAS currently-owned (and possibly under-utilized) tools, and Gartner's Magic

Quadrant for Project Portfolio Management. The Gartner Magic Quadrant is a proprietary research tool developed by Gartner Inc., a US based research and advisory firm.

According to Gartner, the Magic Quadrant aims to provide a qualitative analysis into a market and its direction, maturity and participants, thus possibly enabling a company to be a stronger competitor for that market. Gartner rates vendors upon two criteria: completeness of vision and ability to execute. Using different qualifiers per criteria for the varying industries, the Magic Quadrant then rates the participants along each of these parameters. Gartner does not share these component scores with the participant. Then, using a methodology which Gartner does not disclose, these component scores lead to a vendor position in one of four quadrants:

- Leaders score higher on both criteria; the ability to execute and completeness of vision. Typically larger industry developed businesses with vision and potential for expansion.
- Challengers score higher the ability to execute and lower on the completeness of vision. Typically larger, settled businesses with minimal future plans for that industry.
- Visionaries score lower on the ability to execute and higher on the completeness of vision. Typically smaller companies that are unloading their planned potential.
- Niche players score lower on both criteria: the ability to execute and completeness of vision. Typically new additions to the Magic Quadrant, or market fledglings.

The team created a software evaluation form containing the following evaluation criteria:

- Is the software available from an Ohio based Vendor?
- If software is not available from an Ohio based vendor, is the vendor a US based vendor?
- Is the software available on State of Ohio State Term Schedule?
- Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?
- From what vendor(s) can the software be procured?
- What is the cost of the project management solution?
- What is newest release (version)?
- What are the initial licensing fees?
- Are there on-going licensing fees?
- What number of users does the system support?
- Does the software require maintenance fees?
- Does the software allow source code ownership? Is the software open-source?
- What hardware is required to support the software?
- What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? What is unique from other solutions?
- Does the software offer employee time tracking functionality?
- Does the software offer issue tracking functionality?
- Does the software offer out of the box reporting? If so, describe.
- What type of security does the software offer? Does it allow multiple levels of security? Does it integrate with Active Directory? (Internal and External users)
- Does the vendor offer training with initial procurement? If so, what kind of training? Are their training manuals or job aids available?
- Have we identified other State of Ohio agencies using this software?
- If so, have we talked with this agency regarding advantages and disadvantages?
- Is the software web-based?

The team then conducted research regarding each of the criteria and documented the results for each solution.

The ten software packages reviewed by the team are as follows:

- Microsoft Project EPM Solutions 2010
- Clarity (Computer Associates)
- Gemini
- HyperOffice
- IT4Control
- Project.net
- One2Team
- Onepoint Software
- Tenrox Project Management
- Sharepoint

After the research was completed for each of the ten software packages, PM Wise scored each product as a team in order to select the top three PM software packages.

Project Management Software Evaluations

The following section contains software evaluations completed for each of the ten software packages evaluated as part of this project. The software evaluations were completed by PM Wise team members. Each team member is identified on the software evaluation form. Not all information collected on the evaluation form was directly used in scoring the project management software solution. Information that was not directly used to score the project management software was used as a source of additional detail regarding the product and is documented on the evaluation forms. In addition, if we were able to determine that other State Agencies were using an evaluated product, they were contacted to discuss benefits and weaknesses of the product. Any information collected from these individuals is included on the applicable software evaluation forms.

Clarity

Software Name:	CA Clarity PPM			
Company Name:	Computer Associates			
Reviewed By:	Dan Sowry			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages? Amie Newcomb Clarity Architect Ohio Bureau of Workers' Compensation	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	

7. If so, what are the advantages/disadvantages?

Advantages:

- Reporting is extremely robust.
- Clarity contains all data related to portfolios, projects, resources, and their associated attributes, so reporting can be done at many levels—resource allocations for projects, for various portfolios (groups of projects), or across a department, organization, etc.
- Multiple projects and portfolios can be reported on for status reporting or for trending, estimating, etc.
- Clarity provides two types of reporting, both of which can be used to develop custom reports from existing reports or from scratch:
 - Portlets are online reports that leverage SQL queries as well as advanced HTML elements to add parameters to provide on-demand, on-screen reports.
 - Reports use Business Objects/Crystal Reports advanced reporting capabilities to produce on-demand reports that can also be printed or distributed electronically.
- Clarity provides standard sub-objects for project “parts” such as Change Requests, Risks, and Issues, and all are interrelated, so a Risk can be converted to an Issue, an Issue to a Change Request, etc.
- Clarity can be customized to provide other sub-objects, such as Lessons Learned, so that all entries across all projects can be accessed through customized reports or portlets.
- Clarity allows users to manage their project schedules using the Clarity interface, Open Workbench (a project scheduling tool similar to MS Project but fully compatible with Clarity) or Microsoft Project.
- Clarity includes out-of-the-box processes, and allows creation of custom processes, which can be used to automate parts or all of various business processes in the system. For example, a process is included to route timesheets for approval.
- Clarity includes out-of-the-box jobs, and allows creation of custom jobs, which are used to perform routine tasks for maintenance, processing of transactions, etc. within the system. Jobs can be scheduled to run at any interval (monthly, weekly, hourly, etc.) with limitless flexibility.
- Clarity provides other types of investments (such as tasks to track non-project work, such as operational tasks) so that all resource time can be tracked and allocations can be better estimated and work performed can be accurately reported on.
- Clarity can be used as a full ERP—it has modules for Asset and Application Management, Financial Management (including chargebacks, billing, etc.), Resource Management, etc.
- Clarity can be used for Incident Tracking (as a Help Desk ticket tracking tool).

Disadvantages:

- Expensive to implement, maintain, and support.
 - Clarity is not a cheap application to purchase; the software and associated licenses (administrator licenses, user licenses, and creator licenses) are very expensive in and of themselves. Also, Clarity requires its own Production server, and it is recommended that you also have at least one Test server and one Development server. In addition, it is recommended that you have separate database servers (SQL or Oracle) as well as reporting servers (for CA Business Intelligence, also known as Business Objects).
 - Maintenance and support of Clarity requires full-time staff. Currently, we have a System Architect, a System Administrator, and a Functional Analyst (who handles reporting and recommendations for configurations and usage). We would require additional personnel as well, were it not for the fact that our servers are maintained by our Server department and our databases are maintained by our Database Administrators. Even with their involvement, though, we work with the servers and databases regularly.
- CA (vendor) doesn't provide the greatest support. It's hard to get the right people to work on your open trouble tickets. Many of our more difficult tickets take 2 to 3 months to resolve (though usually once they get the right people involved, it takes only a few days or a week or two).
- Upgrades and implementation of built-in features (e.g. Financial Management) often require external help to implement.
 - Some upgrades (like from 8.1.3 to 8.1.4 or 8.1.4 to 12.0.x) are as simple as installing a fix pack. Others, like 7.5.3 to 8.1, are extremely difficult and require involvement from the vendor or from vendor-recommended resources that have extensive experience with Clarity upgrades.
 - Some built-in functions (such as Resource Management) are easy to implement with little to no configuration. Others, such as Financial Management, are nearly impossible without outside help due to various configuration settings which must be mapped out to mesh business practices with the system.

	<ul style="list-style-type: none"> • Clarity Interface is not intuitive—it doesn't resemble Microsoft products or most other user applications. <ul style="list-style-type: none"> ○ Users seem to struggle with navigation, even on basic elements (like timesheets) until they have done it repeatedly, and often forget if they don't do it regularly. ○ Users don't understand the underlying logic of many parts of the application (like automated processes) and so even Alerts are seen as Error messages. Error messages and Alerts alike seem to be cryptic to users and most spawn a call to the Service Desk for support. 		
8.	From what vendor(s) can the software be procured? Computer Associates		
9.	What is the newest release (version)? V12		
10.	What are the initial licensing fees? >\$10,000		
11.	Are there on-going licensing fees?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	0
12.	What number of users does the system support? 50 to 100,000		15
13.	Does the software require maintenance fees?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	0
14.	Does the software allow source code ownership?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A	0
15.	Is the software open-source?	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A	0
16.	What hardware is required to support the software? This depends on the size of the software package – some packages like Demand, for instance, do not require any hardware installations		
17.	What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? Everything listed there and more!		15
18.	What is unique from other solutions? No hardware required (depends on software package)		
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	9
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	9
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	9

22.	<p>If so, describe: Out of the box reports available through Crystal Reports that help collect information on investments, resources, project statuses, and profitability. CA Clarity PPM connects this business information to red, yellow and green stoplight reports for quick, visual alerts based on a project or program's risk, budget or status. This information can then be drilled down to obtain further detail.</p>			9	
23.	<p>What type of security does the software offer? The security functionality within CA Clarity PPM allows three levels of granularity : Instance Based - This is where the user has a specific right to an instance of an object e.g. an individual project. OBS Based - Based on the Organizational structure that has been defined for your company and linked to the many objects within CA Clarity PPM e.g. Projects, Resources, Processes. Global - Allows users access to all instances of a particular object or defines an area of the application they can see (e.g. Administration) Additionally, there is financial security which is governed by the Entity structure defined as part of the financial setup i.e. membership to an entity gives certain restrictions on what a user will be able to do e.g. Post to WIP or Billing.</p>			15	
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					45
Total Score					168
Additional comments and suggestions:					
Notes:					
References					
http://www.ca.com/us/project-portfolio-management.aspx http://www.ca.com/files/technologybriefs/ca_clarity_od_technical_overview_brief_213501.pdf					

Gemini

Software Name:	Gemini			
Company Name:	CounterSoft			
Reviewed By:	Cheryl Reed			
Evaluation Criteria				Score
1. Is the software available from a US based vendor? <i>Privately-held, Limited Company registered in England (Registration Number 05299579). Our EU VAT registration number is "GB 971639193".</i>	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software? Dell, Motorola, Capgemini, Disney, Intel	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
7. If so, what are the advantages/disadvantages? Not applicable				
8. From what vendor(s) can the software be procured? CounterSoft				
9. What is the newest release (version)? 3.7.2				
10. What are the initial licensing fees? The Gemini Commercial License is perpetual: yours forever to use without having to pay anything again. All purchases come with 12 months Product Support and Upgrades as standard. <ul style="list-style-type: none"> • \$1,999.00 • Unlimited Users and Projects • Add-on + Integration Products • Gemini API • 12 months Support + Upgrades • Web Application Source Code (.NET 3.5) \$1,199.00 without code ownership				

11.	Are there on-going licensing fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9																								
12.	What number of users does the system support? Unlimited Users				15																								
13.	Does the software require maintenance fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9																								
14.	Does the software allow source code ownership?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9																								
15.	Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0																								
16.	What hardware is required to support the software? No specific hardware required. Gemini consists of an ASP.NET web application and SQL Server database components. These can either be installed using the MSI installer files or manually using the source files																												
		<table border="1"> <thead> <tr> <th>#</th> <th>Type</th> <th>Title</th> <th>Comment</th> </tr> </thead> <tbody> <tr> <td>1</td> <td>Mandatory</td> <td>Microsoft .NET Framework v3.5 SP1</td> <td></td> </tr> <tr> <td>2</td> <td>Mandatory</td> <td>Microsoft ASP.NET Charting</td> <td>Get MSChart.exe from http://tinyurl.com/59889k</td> </tr> <tr> <td>3</td> <td>Mandatory</td> <td>SQL Server 2000/20052008/Express</td> <td>Your SQL installation must be case-insensitive!</td> </tr> <tr> <td>4</td> <td>Mandatory</td> <td>Internet Information Server (5/6/7)</td> <td>Web server</td> </tr> <tr> <td>5</td> <td>Optional</td> <td>SMTP Server</td> <td>Required for email activities</td> </tr> </tbody> </table>			#	Type	Title	Comment	1	Mandatory	Microsoft .NET Framework v3.5 SP1		2	Mandatory	Microsoft ASP.NET Charting	Get MSChart.exe from http://tinyurl.com/59889k	3	Mandatory	SQL Server 2000/20052008/Express	Your SQL installation must be case-insensitive!	4	Mandatory	Internet Information Server (5/6/7)	Web server	5	Optional	SMTP Server	Required for email activities	
#	Type	Title	Comment																										
1	Mandatory	Microsoft .NET Framework v3.5 SP1																											
2	Mandatory	Microsoft ASP.NET Charting	Get MSChart.exe from http://tinyurl.com/59889k																										
3	Mandatory	SQL Server 2000/20052008/Express	Your SQL installation must be case-insensitive!																										
4	Mandatory	Internet Information Server (5/6/7)	Web server																										
5	Optional	SMTP Server	Required for email activities																										
17.	What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? Scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculates critical path, project templates, workflow, personal dashboard, automated email, quick metrics, and release management.				15																								
18.	What is unique from other solutions? Gemini also supports mobile and occasionally-connected team workers through Gemini Desktop - a desktop application offering offline working with full data synchronization. Meaning your project management software can always be with you.																												
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9																								
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9																								
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9																								

22.	<p>If so, describe:</p> <p>Standard reports are provided per project and additional reports can be added as required.</p> <p>Custom Reports Custom reports can be created and deployed across single or multiple projects.</p> <ul style="list-style-type: none"> • Create a User Control that inherits from CounterSoft.Gemini.Presenter.Base.ReportBaseControl. • Drop your User Control into the Gemini web application directory. • Add an entry to the Administration Reports section that points to your User Control. • Enable the Report for the projects required via Project Administration Reports. <p>Gemini utilizes the Microsoft ASP.NET Charting Controls for visual elements.</p> <p>Any user can create and save ad hoc reports based upon Filters. User saved ad hoc reports can optionally be shown as Reports within the Project Dashboard.</p>	15			
23.	<p>What type of security does the software offer?</p> <p>Global Groups will be used to group related users and their permissions. For example:</p> <ul style="list-style-type: none"> • Issue Workers: this group will contain people who work on issues. • Issue Administrators: this group will contain people who control all aspects of an issue. • Project Administrators: this group will contain people who can administer projects (the highest permission possible at the project level). <p>By using Global Groups you define group membership globally – group membership does not vary by project (it is the same for all projects).</p> <p>Project Groups allows administrators to vary group membership. Project Groups enable are very useful when you have one or two Security Schemes and you want to vary who can do what per project. For example:</p> <ul style="list-style-type: none"> • Bob & Sarah are part of Developers group for Project X. • Sarah & Tim are part of Developers group for Project Y. <p>As you can see from the above example, the membership of the Developers group is different for each project.</p> <p>Permissions can also be field specific so a specific group can see a field but another group cannot.</p> <p>Delegate the permission administration when appropriate to Project Admins/Leads for smarter administration. Conceal sensitive data from users (hiding internal discussions from external participants), enable CAPTCHA to suit your deployment scenario.</p>	15			
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
26.	Does the vendor offer training with initial procurement? 4 web-based, live instructor courses are available for additional cost. Personalized training is also available for additional cost.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	2
27.	Are there training manuals or job aids available for this software? Nine guides available as free download, knowledge base and webcasts.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	10

28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					75
Total Score					225
Additional comments and suggestions: Integrates with Microsoft Visual Studio 2008 / 2010 / TFS and Outlook					
Notes:					
References CounterSoft. http://www.countersoft.com/home.aspx					

HyperOffice

Software Name:	HyperOffice				
Company Name:	HyperOffice Collaboration Made Simple				
Reviewed By:	Felecia Jackson				
Evaluation Criteria				Score	
1.	Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
2.	Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3.	Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4.	Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5.	Have we identified other State of Ohio agencies using this software?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
6.	If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
7.	If so, what are the advantages/disadvantages? The advantage of HyperOffice is that it allows clients to access the business email, share calendars, contact management, manage documents, have online meetings, online databases, have web forms and much more. HyperOffice can be customized				
8.	From what vendor(s) can the software be procured? HyperOffice				
9.	What is the newest release (version)? n/a				
10.	What are the initial licensing fees? They offer several online collaboration tools Collaboration suite: Monthly: \$1,499.99; Annually: \$14, 399.90 (pricing based on 250 users) Collaboration suite: 20 users \$867.90/annually.				
11.	Are there on-going licensing fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
12.	What number of users does the system support? 250			9	

13.	Does the software require maintenance fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
14.	Does the software allow source code ownership?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
15.	Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
16.	What hardware is required to support the software? No extra hardware is required				
17.	<p>What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?</p> <p>http://www.hyperoffice.com/online-project-management/ (link is a video demo)</p> <p>Create Tasks Manage Responsibilities & Permission To do list Import & Export Tasks to Excel Synch with Outlook Tasks Gantt Charts File Collaboration Interlinking – linking project, tasks and subtasks with related resources</p>				3
18.	<p>What is unique from other solutions?</p> <p>For a small business HyperOffice offers affordable online collaboration tools and hosted intranet solutions. There is no commitment, low cost monthly billing, no contracts and can be canceled at anytime. There is also no IT investment, no servers requires, no maintenance fees.</p>				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
	http://www.hyperoffice.com/online-database-software/				
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
21.	Does the software offer out of the box reporting?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
22.	If so, describe:				0
23.	<p>What type of security does the software offer?</p> <ul style="list-style-type: none"> • HyperOffice offers an archiving feature that allows customers to backup their data. • There is also the secure login application that prevents unauthorized access to company data. For an addition charge they offer a secure (SSL) connection. • Absolute security through 128-bit encryption technology, 99.9% uptime and Verio / NTT class backbone support. • 24 X 7 support via live phone, chat & email, and FREE live training ensure your peace of mind. 				9
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0

26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					75
Total Score					142
Additional comments and suggestions:					
This software is only offered for group of 250 or less					
Notes:					
HyperOffice is a great collaboration and database management software, unfortunately this product does not meet our client's needs in other areas. Eventually the client would out grow HyperOffice.					
References					
http://www.hyperoffice.com/					

IT4Control

Software Name:	IT4Control			
Company Name:	IT4Control			
Reviewed By:	Cheryl Reed			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
7. If so, what are the advantages/disadvantages? Not applicable				
8. From what vendor(s) can the software be procured? IT4Control				
9. What is the newest release (version)? Version 3.2				
10. What are the initial licensing fees? Regular user fees start at \$110 per person per month and include license and maintenance fees. They also offer pay-per-use access fees per hour. \$110 X 12 months x 20 users = \$26,400 per year.				
11. Are there on-going licensing fees? Incorporated in monthly fee.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
12. What number of users does the system support? Unlimited				15
13. Does the software require maintenance fees? Incorporated in monthly fee.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
14. Does the software allow source code ownership?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
15. Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0

16.	<p>What hardware is required to support the software?</p> <p>Typically hosted through IT4Control but for clients who want this on site, the following are the minimal hardware requirements.</p> <p>Platforms supported by IT4Control are rack servers of the IBM xSeries 346 or 3850 type that include the following elements at minimum:</p> <ul style="list-style-type: none"> • 1 or 2 multi-core Intel Xeon processors • 4 GB memory minimum • 2 x 73GB internal disks • Windows Server 2003 or 2008 • DVD-Rom reader • Ethernet interface <p>The database used is Microsoft SQL Server 2005. Clients need Microsoft Internet Explorer (IE6-SP2 min)</p>		
17.	<p>What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?</p> <p>Scheduling, cost control management from a portfolio perspective. Does not provide strong project management functionality for day to day project management control.</p>	3	
18.	<p>What is unique from other solutions? Applications and Project Portfolio Management solution.</p>		
19.	<p>Does the software offer employee time tracking functionality?</p>	<input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A	0
20.	<p>Does the software offer issue tracking functionality?</p>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	9
21.	<p>Does the software offer out of the box reporting?</p>	<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	9

22.	<p>If so, describe:</p> <ul style="list-style-type: none"> • A standardized reporting format that includes standard reports produced at predefined intervals and distributed to different users according to their profiles, either in PDF or Web format. • Specifically designed requests and reporting: Users have access to reports that are adapted to their specialty. They have open access to information to obtain answers to specific questions, such as, "How many instances are found in the Oracle 8 database?" • A personalized reporting format that is easily created using configuration and drag-and-drop by a user or an administrator. • Operational reporting: This type of reporting is produced according to an adapted frequency, which can be almost as often as real-time, to provide an immediate and continuous view of data. This is the case, for instance, of application availability for use. 	15			
23.	<p>What type of security does the software offer?</p> <p>The integrated management of profiles and access rights guarantees that only authorized users will be able to access the information that concerns them. If necessary, the solution can be made accessible in the HTTPS secure mode or by VPN.</p>	9			
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
26.	Does the vendor offer training with initial procurement?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
27.	Are there training manuals or job aids available for this software?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					45
Total Score					141
Additional comments and suggestions:					
IT4 is more of a Project and Application Portfolio Management tool for managerial staff than a project management solution.					
Notes:					
References					
IT4Control http://it4control.com					

Microsoft Project (Enterprise Project Management) EPM

Software Name:	Microsoft			
Company Name:	Microsoft Project EPM Solutions 2010 (MS Project and Server)			
Reviewed By:	Erika C. Sowry			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor? Although Licensed Authorized Resellers may be MBE/EDGE in FY 2012.	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	

<p>7.</p>	<p>If so, what are the advantages/disadvantages?</p> <p>Advantages:</p> <ul style="list-style-type: none"> • The 2010 version of EPM is built on Microsoft SharePoint Server, providing support and inclusion of SharePoint’s business collaboration capabilities, a common user interface, data integration, search functions, and reporting infrastructures. (Gartner 2010) • The 2010 version of EPM combines Microsoft’s portfolio management capabilities and its centralized project management features (previously in two separate but integrated products) into a single, unified product with a common repository and data flow. (Gartner 2010) • The 2010 release of EPM adds support for managing projects and work requests during the demand collection, proposal, business case generation, and approval/rejection phases of a typical project life cycle. (Gartner 2010) <p>Disadvantages:</p> <ul style="list-style-type: none"> • Microsoft EPM does not yet provide strong, out-of-the-box “budget versus actual” reporting at the portfolio level, but customers can meet these requirement with custom fields, by extending Excel Services integration or with a number of existing add-on modules available from the Microsoft partner network. In addition, EPM provides integration and bridges to third-party financial management systems. (Gartner 2010) • Microsoft EPM provides limited preconfigured reports and dashboards. Users will need to create and modify their own reports using Excel and Excel Services, the added Report Wizard, or the Performance Point Dashboard Designer. Alternatively, more-advanced reports can also be developed using SQL Reporting Services, which generally require a skilled IT resource. (Gartner 2010) <p>The DAS/OIT Project Management Office uses Project and Project Server along with other Microsoft products (Share Point, Excel) in conjunction for their PMO. A representative from the OIT PMO made the following comments when questioned about usage:</p> <p>M/S EPM – yes I have experience, both good and bad. Microsoft would love everyone to be on it, since it increases the licensing and the amount they get paid. The reality is that there are 2 modules – one (for which I haven’t had a lot of experience) seems good; the second, has some issues. The first module is for planning at the program level (i.e. we have a request to do something – where does it fit in the strategic plan, have we got resources to do it, etc.). It looks OK, although I haven’t seen the latest version. The second module uses a Project Server approach to “coordinate” project plans across the whole organization. In concept, it sounds great; in reality, it’s a big of a monster and a nightmare to operate (or at least old versions were and, given the nature of the problems, I don’t know if M/S solved them). Firstly, it requires all the resources that are in project plans to be in one common resource pool – not an easy thing to do in a large organization. Secondly, it works reasonably well if resources are assigned to projects within a given department and only within that department (with one manager “approving” the time they spent working on a given project). Once a resource works on different projects managed by different managers, things get complicated. For example, Manager A needs to re-schedule his Resource X to do something else today because of a high priority incident. He looks at his project plan which gives him to Tuesday to finish the task, and slides Resource X’s task from Monday to Tuesday. However, since the resource was on another plan, run by Manager B, the change in schedule just screwed up Manager B’s plan and made him miss a deadline (because Resource X had a task that was on a critical path or was a dependency on someone else’s task that now slipped and affected the critical task).</p>	
<p>8.</p>	<p>From what vendor(s) can the software be procured?</p> <p>Microsoft products can be procured from several state Licensed Authorized Resellers (LARs). The LAR for DAS is Dell/ASAP. All MS Project purchases must be procured via the Microsoft Enterprise Agreement with DAS.</p>	
<p>9.</p>	<p>What is the newest release (version)? Microsoft Enterprise Project Manager (EPM) Solution 2010</p>	

10.	<p>What are the initial licensing fees?</p> <p>Licensing fees for DAS vary depending upon version purchased and whether or not the license was purchased under the DAS Enterprise Agreement with or without Software Assurance (SA). Specific seat/license costs specific to DAS range between \$150-\$1000 for MS Project (without server) depending upon needs and contract length.</p> <p>For true-up of 20 licenses (for MS Project only) under the DAS Microsoft Enterprise Agreement and estimated cost per license would be approximately \$250 x 20 users = \$5000.</p> <p>This does not include pricing for Project Server 2010 as DAS owns Project Server user licenses but costs have not necessarily been broken out by usage per particular office. It has been determined that Project Server can be made available for usage by IT Services. An evaluation would need to occur regarding support and hosting of the server.</p>		
11.	<p>Are there on-going licensing fees?</p> <p>If Software Assurance (SA), i.e. upgrade rights are included then fees are renewed every three years via the DAS Enterprise Agreement.</p>	<p><input checked="" type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A</p>	0
12.	<p>What number of users does the system support?</p> <p>If Project Server is included and well managed, hundreds, even thousands of users can utilize it.</p>		15
13.	<p>Does the software require maintenance fees?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A</p>	0
14.	<p>Does the software allow source code ownership?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A</p>	0
15.	<p>Is the software open-source?</p>	<p><input type="checkbox"/> Yes <input checked="" type="checkbox"/> No <input type="checkbox"/> N/A</p>	0
16.	<p>What hardware is required to support the software?</p> <p>Hardware and software requirements (Project Server 2010) Updated: October 7, 2010</p> <p>This article describes in detail hardware and software requirements for Project Server 2010.</p> <p>At a high-level, the key requirements for Project Server 2010 are as follows:</p> <ul style="list-style-type: none"> ● The 64-bit version of Windows Server 2008 Service Pack 2 or Windows Server 2008 R2 ● Microsoft SharePoint Server 2010 Enterprise version ● For a farm deployment, database servers must be the 64-bit version of Microsoft SQL Server 2008 with Service Pack 1 (SP1) and Cumulative Update 2, Microsoft SQL Server 2008 R2, or Microsoft SQL Server 2005 with Service Pack 3 (SP3) ● Microsoft Internet Explorer 7 or Microsoft Internet Explorer 8 for Microsoft Project Web App user access 		

17.	<p>What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?</p> <p>The EPM solution automates the following PPM capabilities:</p> <ul style="list-style-type: none"> • Demand Management - Intuitively capture all requests within a central repository, and manage them using governance workflow • Portfolio Selection and Analytics - Objectively prioritize, optimize, and select project portfolios that best align with the organization's business strategy • Resource Management - Proactively and reactively manage resources throughout the project life cycle • Schedule Management - Easily create and communicate both simple and complex project schedules • Financial Management - Control and measure project and portfolio financial performance • Time and Task Management - Simplify the collection of time and task status updates from team members • Team Collaboration - Better connect disparate teams to share information and drive collaboration • Business Intelligence and Reporting - Effectively measure project performance and gain visibility and control across all portfolios • Administration, Scalability and Extensibility - Streamline administration and effectively extend the solution to meet unique business requirements 	15			
18.	<p>What is unique from other solutions? Microsoft Project and Project Server 2010 offer full compatibility and integration with all other Microsoft products including SharePoint. Microsoft's suite of solutions offers a completely robust Project Management environment and since it is used by the vast majority of the state already, integration between agencies would be enhanced and there would be minimal costs involved in utilizing the products already in-house to their full potential.</p>				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	15
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	15
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9

22.	If so, describe:	15
<p>Microsoft EPM solution includes a variety of online views, such as Project Center, Resource Center, and Portfolio Analysis, in addition to powerful Business Intelligence (BI) and reporting services to help organizations gain insight, visibility, and control across all project portfolios.</p> <p>Because Microsoft Project Server 2010 is built on Microsoft SharePoint Server 2010, users can take advantage of all the tools included in the Microsoft BI platform, such as Excel Services, Performance Point Services, Visio Services, and Power Pivot for Excel, SQL Reporting Services, and more. The flexible Microsoft BI solution provides non-technical resources with familiar tools to easily create reports and configure powerful dashboards, while providing technical resources with more sophisticated capabilities to create complex views.</p> <p>Project Server 2010 includes a dedicated reporting database that stores project and portfolio data to ensure access to up-to-date information. Project management offices (PMOs) can satisfy line-of-business (LOB) reporting requirements by using departmental cubes, so decision makers can focus on their data, eliminate unnecessary clutter, and ensure faster build times.</p> <p>The improved Business Intelligence Center in Project Server 2010 includes a library of preconfigured best-practice template reports. Nontechnical resources can get started quickly by customizing the templates in a familiar Excel editor and then simply publish the report using Excel Services to be incorporated into dashboard views. PMOs can create intuitive audience-based dashboards to ensure that managers receive relevant and useful information. Resources that are more technical can use more sophisticated tools, such as SQL Server Reporting Services, to create complex reports for example, monthly reporting packs to meet the organization's unique requirements.</p>		

23.	What type of security does the software offer?				15
<p>Microsoft Project Server 2010 security is based on users, groups, and categories. Groups contain sets of users who need to access the same set of data in the same way. Categories provide access to projects and resources based on parameters that you define.</p>					
<p>Define your groups by identifying common needs based on the areas of Project Server to which users in your organization need access. After you define your groups, you can add users to the groups and grant permissions to the groups. Permissions assigned to groups apply to all of the users that the group contains. Using groups to control access to Project Server simplifies security administration.</p>					
<p>Project Server users can be automatically added or removed from groups based on Active Directory group membership. This can be configured in Project Server 2010 through the Active Directory synchronization feature. For more information, see Manage security group synchronization with Active Directory in Project Server 2010.</p>					
<p>Users can belong to multiple groups according to their role in the organization and their access requirements. Several groups are created by default when Project Server 2010 is installed, each of which is assigned a set of predefined categories and permissions. For more information, see Manage security groups in Project Server 2010.</p>					
<p>Administrators usually assign permissions by adding a user account to one of the built-in groups or by creating a new group and assigning specific permissions to that group.</p>					
<p>For complete lists of Project Server permissions, see Project Server 2010 category permissions and Project Server 2010 global permissions.</p>					
<p>The following tasks for managing security in Project Server are performed on these components:</p>					
<ul style="list-style-type: none"> • Manage users in Project Server 2010 • Manage security groups in Project Server 2010 • Manage categories in Project Server 2010 • Manage security templates in Project Server 2010 • Manage Project Web App permissions in Project Server 2010 • Manage security group synchronization with Active Directory in Project Server 2010 • Manage Enterprise Resource Pool synchronization with Active Directory in Project Server 2010 • Manage delegates in Project Server 2010 					
<p>The TechNet Security Center provides links to technical bulletins, advisories, updates, tools, and prescriptive guidance designed to help IT pros keep Microsoft servers, desktops, and applications up to date and secure.</p>					
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6

27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					60
Total Score					201
Additional comments and suggestions:					
The Microsoft Enterprise Project Management (EPM) solution is a flexible, end-to-end platform, used across a broad variety of industries to select and effectively deliver the right project portfolios. The Microsoft Enterprise Project Management (EPM) solution is a flexible, end-to-end platform, used across a broad variety of industries to select and effectively deliver the right project portfolios. The EPM solution includes Microsoft Project Professional 2010 and Microsoft Project Server 2010 to provide a unified PC and Web-based Project and Portfolio Management (PPM) offering.					
Notes:					
References					
Microsoft Tech Net Microsoft.com/project Gartner Leaders Wikipedia DAS Microsoft Enterprise Agreement LAR Price List 2010 DAS/OIT PMO					

One2Team

Software Name:	ONE2TEAM			
Company Name:	ONE2TEAM			
Reviewed By:	Felecia A. Jackson			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
7. If so, what are the advantages/disadvantages?				
8. From what vendor(s) can the software be procured?	ONE2TEAM			
9. What is the newest release (version)?	Version 2			
10. What are the initial licensing fees? Pricing information is not available without vendor consultation				
11. Are there on-going licensing fees?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
Pricing information is not available without vendor consultation				
12. What number of users does the system support?	No information on # of users but does appear to support larger industries in France, no US companies are represented or appear to utilize this software solution.			9
13. Does the software require maintenance fees? Pricing information is not available without vendor consultation	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
14. Does the software allow source code ownership? No information	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
15. Is the software open-source? Not sure	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0

16.	What hardware is required to support the software? No information				
17.	What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? Project / Program management solutions One2team is specifically efficient when facing multi-site, multi-country, multi-business and high complexity projects : Strategic and transformation : organizational projects, merger and acquisitions, cost cutting Information Technology and IS projects : in house developments, packaged solution configuration Deployment : new business concept, distribution channel reorganization, technical infrastructure deployment The core of our approach is the industrialization of project management activities and collaboration. All project actors benefit from an easy access to a collaboration space. They can collaborate on documents and take part in project processes: milestones, deliverables, actions, risqué, decisions, reports, issues... They can easily track cross-dependences when managing programs.				9
18.	What is unique from other solutions? <ul style="list-style-type: none">ONE2TEAM enables customers to employ a SaaS PPM system for its most complex IT projects or manage complex projects or program requiring extensive collaboration.ONE2TEAM provides 2 services: Consulting and Technical Services. The consulting team is responsible for deployment projects and the technical services they provide include support for all the infrastructure and operation of the ONE2TEAM solutions for clientsONE2TEAM can be deployed s n 'umbrella portfolio system, supporting existing PPM environments. This allows the company to bring portfolio-level visibility to these environments				
19.	Does the software offer employee time tracking functionality?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
20.	Does the software offer issue tracking functionality?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
21.	Does the software offer out of the box reporting? Not sure	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
22.	If so, describe:				
23.	What type of security does the software offer? No information available on security.				3
24.	Does the software allow multiple levels of security?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
26.	Does the vendor offer training with initial procurement? No information available	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6

27.	Are there training manuals or job aids available for this software? No information available	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					0
Total Score					54
Additional comments and suggestions:					
<p>This is a French company and does not appear to have any clients in the US. Additionally, their Project Management solutions do not provide any of the requirements set forth in this project charter. One2Team.com does not provide any valuable information and there is no information in any of the other IT resources researched on the internet. Without a specific consultation with the vendor there is very little information available to make a determination on the advantages/disadvantages of this software. Scoring for this product is incomplete as the vendor requires you to contact them for pricing. As this software did not rank high in key areas, team has elected not to contact vendor for pricing.</p> <p>Because of the lack of support in the United States this would not be a good company for our client to go with.</p>					
Notes:					
They do not provide strong, direct integration to third-party ITSM and ALM application, hindering its ability to build IT service or application portfolios. It does not exemplify strong North American PPM for IT market penetration, but rather, is mainly successful in Europe.					
One2team offers an alternative approach for project and portfolio management					
<ul style="list-style-type: none"> ▪ Focused on results / operational vision for decision making and steering the solutions are not resource management oriented ▪ Result driven and forward facing steering approach, project progress based on operational project practices : One2team is not activity based ▪ Facilitating collaboration with industrialized project practices. Improving committees' efficiency. Focus on steering relevance and drill down : One2team is efficient ▪ Reconciling management vision & day to day activities in the field through a unique collaborative framework : One2team is not declarative 					
References					
http://en.one2team.com/					

OnePoint

Software Name:	Onepoint Software				
Company Name:	Onepoint				
Reviewed By:	Dan Sowry				
Evaluation Criteria				Score	
1.	Is the software available from a US based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
2.	Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3.	Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4.	Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5.	Have we identified other State of Ohio agencies using this software?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
6.	If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
7.	If so, what are the advantages/disadvantages?				
8.	From what vendor(s) can the software be procured? Onepoint Sales Office				
9.	What is the newest release (version)? V10.1				
10.	What are the initial licensing fees? For 20 users, approximate cost is \$8,290.00				
11.	Are there on-going licensing fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
12.	What number of users does the system support? 1 to Unlimited				
13.	Does the software require maintenance fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
14.	Does the software allow source code ownership?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0

15.	Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
16.	What hardware is required to support the software? Intel PC, Linux 2.4 or higher, 1 GB, 50 MB, JRE 5 or higher, JRE 6 recommended				
17.	What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? Work Breakdown Structure, Project Pipeline, Cost Baseline, Plan/Actual Comparisons, Milestone Trend Analysis, Resource Utilization, GANTT/Schedule, Tasks and Comments, Documents and Links, Project Templates, Custom Types & Fields, E-Mail Alerts, Custom Report Wizard, Project Traffic Light				9
18.	What is unique from other solutions? No hardware required (depends on software package)				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
22.	If so, describe: The new report wizard allows manager users of Onepoint Project to create their own tabular reports simply via point & click. Such custom reports can then be saved and shared with other users or groups within the project organization. Custom reports support grouping, sorting and filtering				9
23.	What type of security does the software offer? Functionality is based on the roles of observer, contributor, and manager.				3
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
	Solution Cost Score				60
	Total Score				153

Additional comments and suggestions:

Notes:

References

<http://www.onepoint-project.com/>

Project.net

Software Name:	Project.Net				
Company Name:	Integrated Computer Solutions (ICS) of Bedford, Massachusetts				
Reviewed By:	Crystal Beacom				
Evaluation Criteria				Score	
1.	Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
2.	Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3.	Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4.	Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5.	Have we identified other State of Ohio agencies using this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
6.	If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
7.	If so, what are the advantages/disadvantages? N/A				
8.	From what vendor(s) can the software be procured? It's an open source and can be downloaded.				
9.	What is the newest release (version)? 9.2				
10.	What are the initial licensing fees? It's free.				
11.	Are there on-going licensing fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
12.	What number of users does the system support? 1 to 2000+				9
13.	Does the software require maintenance fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
14.	Does the software allow source code ownership?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
15.	Is the software open-source?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
16.	What hardware is required to support the software? http://doc.project.net/9_1:Project.net_Deployment_Requirements				

17.	What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer? Scheduling, cost control management, resource allocation, collaboration, communication, document management, critical path.				3
18.	What is unique from other solutions? Open source code with many attributes our project is looking for.				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
20.	Does the software offer issue tracking functionality?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
22.	If so, describe: Project.net's Report module allows you to create and output a variety of standard project reports, such as: <ul style="list-style-type: none"> • Late Task Reports • Tasks Coming Due • Resource Allocation • Over-Allocation of Resources • Scheduled Tasks • Form Items Summary • Time Submittal 				9
23.	What type of security does the software offer? Security on documents at different levels.				9
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
26.	Does the vendor offer training with initial procurement? Yes – if you purchase training.	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	2
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	2
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					75
Total Score					187
Additional comments and suggestions:					

Notes:

Wiki available.

Project.net offers several service level agreements for our Enterprise customers. Support offerings can include:

- Phone and email support
- Free upgrades
- Access to patch releases
- Training and professional services

Empowers Teams

- [Personal Dashboards](#)
- [Team Assignments](#)
- [Notifications](#)
- [Time Management](#)

Drives Collaboration

- [Unified Blogs](#)
- [Project-based Wikis](#)
- [Built-in Document Management](#)
- [Integrated Discussion Groups](#)

Maximizes Accountability, Visibility

- [Project Dashboards](#)
- [Project Workplans](#)
- [Activity Logs](#)
- [Time Submittal Reports](#)
- [Workflow](#)
- [Forms](#)
- [Phase Review](#)

Aligns Goals & Priorities

- [Organization Dashboard](#)
- [Project Templates](#)
- [Resource Management](#)
- [Portfolio Scoring](#)
- [Extensive Reporting](#)

References

<http://www.project.net/>

<http://www.oar.net/initiatives/> (The Ohio Academic Resources Network)

Tenrox

Software Name:	Tenrox			
Company Name:	Tenrox			
Reviewed By:	Erika C. Sowry			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	3
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
3. Is the software available on State of Ohio State Term Schedule?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
5. Have we identified other State of Ohio agencies using this software?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	<input checked="" type="checkbox"/> N/A	
7. If so, what are the advantages/disadvantages?	<p>Some great benefits are:</p> <ul style="list-style-type: none"> • Standardizes project processes and methodology • Processes are made easily adaptable • Change are easy to effect across the team • The cost of compliance is minimized • All project cost and revenue are accounted • Deriving optimum output out of the workforce • Can leverage best practices <p>Another prominent benefit that needs special mention is: Data can be exported to and exchanged with leading systems for accounting (Great Plains, Sage ACCPAC, SAP Business One, QuickBooks), for payroll (ADP, Ceridian, Paychex), for ERP solutions (SAP, Oracle, PeopleSoft), for project management (Microsoft Project), for CRM (Salesforce.com, Microsoft CRM) and for HR.</p> <p>Another advantage is that Tenrox is a lead provider or time reporting systems per Gartner and has robust application integration. A negative per Gartner is that advanced project prioritization is still under development.</p>			
8. From what vendor(s) can the software be procured?	Tenrox can be availed directly from various sales channels and Tenrox Network Partners.			

9.	What is the newest release (version)? No versioning information available. Current/only release is: Tenrox Project Workforce Management R9.0				
10.	<p>What are the initial licensing fees?</p> <p>SUMMARY & PRICING</p> <p>Tenrox Project Workforce Management is well suited for medium to larger firms in various industries. It is a good fit for larger firms that need to accommodate users working at client sites, and that need to integrate time and expense data with accounting or project systems. Tenrox also offers a turnkey small business starter package for up to 30 users. Tenrox is priced by the number of registered users and modules activated, and billed monthly. Rates start at \$10 to \$15 per user/module/month. The all-inclusive fee covers application hosting fees, server license costs, connectors, standard support and seamless upgrades to new releases. Tenrox provides a SAS 70 TYPE II Certified hosting facility, which undergoes a stringent audit, renewed annually.</p> <p>Modules appear to be priced separately:</p> <ul style="list-style-type: none"> • Modules include: Time and Expense Reporting, Workforce Planning, Project Process Management, Cost and Revenue Accounting and Analytics • Additional features: Milestone/hourly and fixed billing, project issue and risk tracking, multi-client invoicing, audit trail • Built-in integration to 3rd party solutions such as MS Project, Great Plains, QuickBooks, ACCPAC, SAP Business One, ADP, Ceridian <p>Estimated price for five modules for \$75 x 20 users x 12 months = estimated cost of \$18,000 per year</p>				
11.	Are there on-going licensing fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	0
12.	<p>What number of users does the system support?</p> <p>No specific limitation however the software seems to support extremely large, enterprise-focused organizations: Tenrox has been offering its project management software tools to clients such as GE Infrastructure-GE Fanuc, Rio Tinto Alcan, E*TRADE Financial Corp, Blue Cross Blue Shield NC, Alstom, IBM, SNC Lavalin, Hydro Quebec, Pioneer Natural Resources, Westinghouse Rail Systems, SAS, Thales, US Army, The Pentagon, Talisman Energy, Oxfam, Thermo Fisher Scientific, Estee Lauder, and Wyeth</p>				9
13.	Does the software require maintenance fees?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	9
14.	Does the software allow source code ownership?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
15.	Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	0
16.	What hardware is required to support the software? N/A as software is completely cloud-based.				

17.	<p>What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?</p> <p>Few of the notable functions and features of Tenrox Project Workforce Management software are:</p> <ol style="list-style-type: none"> 1. Tenrox Project tool module provides: <ol style="list-style-type: none"> 1. Applications for workforce planning and management in project management 2. Analytic tools for time and expense tracking. 3. Cost management tools as well as revenue and accounting analytics solutions. 4. Certified connectors to well-known ERP, 5. Payroll 6. Project management 7. QuickBooks 8. CRM applications. 2. Tenrox Built-in features provide: <ul style="list-style-type: none"> • Invoicing and billing facilities • Breakdown compliances for risk and project tracking • Multi-client and workforce management system integrated with graphical workflow engine. • Audit trail, breakdowns and Invoicing. 3. Tenrox Project Workforce Management is user-friendly and easy-to-learn software that can be introduced in phases. Begin by addressing the most pressing needs first – perhaps one can start with the Time and Expense Tracking module and manage spreadsheets accordingly. Addressing issues in phases has its own advantages, the biggest being a user can handle operations at their own pace. So, Tenrox Workforce modularity lets you deploy all the complex managerial tasks with all the ease. So whether it's workforce management, process improvement and progress check, or, analytics and solutions; Tenrox exclusive workforce engine helps accomplish all. 	15			
18.	<p>What is unique from other solutions?</p> <p>Data can be exported to and exchanged with leading systems for accounting (Great Plains, Sage ACCPAC, SAP Business One, QuickBooks), for payroll (ADP, Ceridian, Paychex), for ERP solutions (SAP, Oracle, PeopleSoft), for project management (Microsoft Project), for CRM (Salesforce.com, Microsoft CRM) and for HR.</p>				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	15
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
22.	<p>If so, describe:</p> <p>Tenrox provides you with the industry's most flexible reporting options. You can design your own reports and dashboards using our built-in designer, you can use Microsoft Reporting Services, or build dynamic reports and charts using our OLAP cubes ... all free of charge. All the reports and dashboards are built on .NET and can be easily shared in your enterprise or SharePoint portals.</p>	15			

23.	What type of security does the software offer? Solutions are both ISO 27001 and SAS 70 certified.				15
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	6
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	9
Solution Cost Score					45
Total Score					180
Additional comments and suggestions:					
Sarbanes-Oxley compliant, integrates with Microsoft Project and Share Point/server, Six Sigma Accuracy – Project tracking					
Notes:					
Tenrox is a premium Gold Certified Microsoft Developer with quick and easy to setup connectors to all major financial, HR and CRM applications, as well as to SharePoint. Setup and transactional information is easily exchanged with your financial system empowering you to use your accounting system for summary financial reporting and leveraging Tenrox to manage your project details.					
References					
www.tenrox.com					
Gartner Leaders Research					
Wikipedia					
Other online technical research articles					

Sharepoint

Software Name:	SharePoint			
Company Name:	Microsoft			
Reviewed By:	Crystal Beacom			
Evaluation Criteria				Score
1. Is the software available from a US based vendor?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
2. Is the software available from an Ohio based vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
3. Is the software available on State of Ohio State Term Schedule?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
4. Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
5. Have we identified other State of Ohio agencies using this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
6. If yes, have we talked with this agency regarding advantages and disadvantages?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
7. If so, what are the advantages/disadvantages? n/a				
8. From what vendor(s) can the software be procured?	Microsoft			
9. What is the newest release (version)?	SharePoint 2010			
10. What are the initial licensing fees?	n/a – DAS division already has this.			
11. Are there on-going licensing fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
12. What number of users does the system support? 20 Site Collections of 50 GB each, which makes the space available to 1 T				
13. Does the software require maintenance fees?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
14. Does the software allow source code ownership?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
15. Is the software open-source?	<input type="checkbox"/> Yes	<input checked="" type="checkbox"/> No	<input type="checkbox"/> N/A	
16. What hardware is required to support the software? 64 bit, 16 GB				

17.	<p>What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?</p> <ul style="list-style-type: none"> • Project Managers: Project status, task management and reporting capabilities; • Engineering Team: Day-to-day development tasks and bugs management, as well as collaboration on design and development; • Quality Control: Day-to-day testing and bugs management, as well as learning and understanding the functional capabilities of each product; • Support: Knowledge base repository of product capabilities, as well as managing the status of outstanding bugs; and • Executive: Overall project status, as well as drilling down into specific project details. • Sharepoint2010 – Can be integrated with Microsoft Project Management 2010 				
18.	<p>What is unique from other solutions? Build websites quickly. Integrates with other Microsoft Products.</p>				
19.	Does the software offer employee time tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
20.	Does the software offer issue tracking functionality?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
21.	Does the software offer out of the box reporting?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
22.	<p>If so, describe: The Report Center is a site template that is optimized for managing and displaying reports, dashboard pages, and <u>key performance indicators (KPIs)</u>. It can serve as the central location for a team, department, or organization to store, retrieve, and modify shared reports. With the appropriate permissions, anyone can create a Report Center site anywhere in a site collection.</p>				
23.	<p>What type of security does the software offer? http://technet.microsoft.com/en-us/library/cc262331(office.12).aspx</p>				
24.	Does the software allow multiple levels of security?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
25.	Does the software integrate with Active Directory? (Internal and External Users)	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
26.	Does the vendor offer training with initial procurement?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
27.	Are there training manuals or job aids available for this software?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
28.	Is the software web based?	<input checked="" type="checkbox"/> Yes	<input type="checkbox"/> No	<input type="checkbox"/> N/A	
Additional comments and suggestions:					
Notes:					

References

<http://sharepoint.microsoft.com/en-us/Pages/default.aspx>

<http://blog.fpweb.net/sharepoint-licensing-costs-for-intranet-extranet-internet-sites/>

<http://sharepointware.com/interview-questions/Sharepoint-Reporting/26.aspx>

<http://technet.microsoft.com/en-us/library/cc262485.aspx#section1>

<http://office.microsoft.com/en-us/sharepoint-server-help/introduction-to-the-report-center-HA010174199.aspx>

Project Management Software Scoring

Scoring Methodology

The scoring methodology used to determine an evaluation score for each project management software solution required that each major requirement first be weighted. If the criterion was considered essential, it was assigned a weight of 3. If the criterion was desirable but not necessarily essential, it was assigned a score of 2. Criteria considered nice to have, but not essential were assigned a weight of 1.

Each criterion was then given a score from 0 to 5. If the criterion was not met for a given solution, it was given a score of 0. If the criterion was partially met, it was given a score of 1. If the criterion was met, it was assigned a score of 3. For those that exceeded the criterion, a score of 5 was awarded.

The weight of the criterion was then multiplied by the score to determine the number of points for each criterion.

Project Management solution pricing was scored by awarding points based on the price range the project management solution fit into. Pricing was assigned a weight of 3. Solutions with an initial implementation cost of less than \$5,000 were given a score of 25. Solutions with a price of between \$5,000 and \$10,000 were given a score of 20. Solutions costing greater than \$10,000 were given a score of 15. Approximately 30% of the project management solution's possible score was based on the solution's cost.

The maximum number of points attainable by any project management software solution is 269 points. See Appendix A for additional information.

Summary

Criterion weight

- essential (3 points)
- desirable (2 points)
- nice to have (1 point)

Criterion score

- 0 = does not meet requirements
- 1 = partially meets requirements
- 3 = meets requirements
- 5 = exceeds requirements

Pricing

- Less than \$5000 (25 points)
- \$5000 - \$10000 (20 points)
- 10000 + (15 points)

Clarity Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	3	3	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	0	0	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	3	9	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	3	6	
Are there training manuals or job aids available for this software?	2	3	6	
Is the software web based?	3	3	9	
Solution Cost	3	15	45	
Total Score			168	

Gemini Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	0	0	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	3	9	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	3	9	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	1	2	
Are there training manuals or job aids available for this software?	2	5	10	
Is the software web based?	3	3	9	
Solution Cost	3	25	75	
Total Score			225	

HyperOffice Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	3	9	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	1	3	
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	0	0	
Describe out of box reporting.	3	0	0	
What type of security does the software offer?	3	3	9	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	1	3	
Does the software integrate with Active Directory? (Internal and External Users)	2	0	0	
Does the vendor offer training with initial procurement?	2	1	2	
Are there training manuals or job aids available for this software?	2	1	2	
Is the software web based?	3	3	9	
Solution Cost	3	25	75	
Total Score			142	

IT4Control Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	0	0	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	3	9	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	1	3	
Does the software offer employee time tracking functionality?	3	0	0	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	3	9	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	0	0	
Does the vendor offer training with initial procurement?	2	0	0	
Are there training manuals or job aids available for this software?	2	0	0	
Is the software web based?	3	3	9	
Solution Cost	3	15	45	
Total Score			141	

Microsoft Project (Enterprise Project Management) EPM Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	3	3	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	0	0	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	
Does the software offer employee time tracking functionality?	3	5	15	
Does the software offer issue tracking functionality?	3	5	15	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	3	6	Included in Enterprise Agreement
Are there training manuals or job aids available for this software?	2	3	6	
Is the software web based?	3	3	9	
Solution Cost	3	20	60	Cost to bring licensing up to date
Total Score			201	

One2Team Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	0	0	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	3	9	Must support at least 200
Does the software require maintenance fees?	3	0	0	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	3	9	
Does the software offer employee time tracking functionality?	3	0	0	
Does the software offer issue tracking functionality?	3	0	0	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	3	9	
What type of security does the software offer?	3	1	3	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	0	0	
Does the software integrate with Active Directory? (Internal and External Users)	2	0	0	
Does the vendor offer training with initial procurement?	2	3	6	Training offered for an additional fee.
Are there training manuals or job aids available for this software?	2	0	0	
Is the software web based?	3	3	9	
Solution Cost	3		0	Cannot determine price without contacting vendor.
Total Score			54	Scoring for this product is incomplete as the vendor requires you to contact them for pricing. As this software did not rank high in key areas, team has elected not to contact vendor for pricing.

OnePoint Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	0	0	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	0	0	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	3	9	
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	3	9	
What type of security does the software offer?	3	1	3	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	0	0	
Does the vendor offer training with initial procurement?	2	3	6	
Are there training manuals or job aids available for this software?	2	3	6	
Is the software web based?	3	3	9	
Solution Cost	3	20	60	
Total Score			153	

Project.net Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	3	9	Requirement is no
What number of users does the system support?	3	3	9	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	3	9	
Is the software open-source?	2	3	6	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	1	3	No quality management
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	0	0	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	3	9	
What type of security does the software offer?	3	3	9	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	1	2	Payment required for training
Are there training manuals or job aids available for this software?	2	1	2	
Is the software web based?	3	3	9	
Solution Cost	3	25	75	Free, Open Source
Total Score			187	

Tenrox Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	0	0	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	3	9	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	
Does the software offer employee time tracking functionality?	3	5	15	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	3	6	
Are there training manuals or job aids available for this software?	2	3	6	
Is the software web based?	3	3	9	
Solution Cost	3	15	45	
Total Score			180	

SharePoint Team Scoring Results

Evaluation Date: 10/19/2010

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	0	0	
Is the software available on State of Ohio State Term Schedule?	1	3	3	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	0	0	
Are there on-going licensing fees?	3	0	0	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	0	0	Requirement is no
Does the software allow source code ownership?	3	0	0	
Is the software open-source?	2	0	0	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	Exceeds with Sharepoint 2010
Does the software offer employee time tracking functionality?	3	3	9	
Does the software offer issue tracking functionality?	3	3	9	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	3	9	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	1	2	
Are there training manuals or job aids available for this software?	2	3	6	Online through EA Training Vouchers
Is the software web based?	3	3	9	
Solution Cost	3	25	75	
Total Score			200	

Recommendations

Software Recommendation Comparison - Top 3

This software recommendation comparison chart shows the top three evaluated project management software solutions from this project. It also shows a comparison between the three products based on key evaluation criteria.

	Gemini	Microsoft Project	SharePoint
On-going license fees	9	0	0
Number of users	15	15	15
Maintenance fees	9	0	0
Allow source code ownership	9	0	0
Open source	0	0	0
PM Functionalities	15	15	15
Employee Time Tracking	9	15	9
Time Tracking	9	15	9
Issue Tracking	9	9	9
Standard Reporting	15	15	15
Security	15	15	15
Multiple level security	9	9	9
Integrate with Active Directory	9	9	9
Training	2	9	2
Manuals or Job Aids	15	9	9
Web based	9	9	9
Cost	75	60	75
Score out of 269	225	201	200

Gemini Recommendation Summary

Gemini software by CounterSoft scored the highest on the project management software evaluation. This software product met most of the project sponsor's requirements. Out of a maximum of 269 points, Gemini scored 225 in part due to its low licensing fees and no maintenance fees. Additionally, this software package offered source code ownership that many of the larger proprietary companies such as Microsoft did not. Gemini has minimal hardware requirements. Gemini offers scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculates critical path, project templates, workflow, personal dashboard, automated email, quick metrics, and release management. Gemini is unique because it also supports mobile and occasionally-connected team workers through Gemini Desktop -- a desktop application offering offline working with full data synchronization.

Gemini does not fit well into DAS/OIT's overall enterprise focus for project management, as the OIT Project Management Office (PMO) does not utilize it. Additionally, while the licensing fees are low, Gemini's ability to scale up to the enterprise-level may be limited. It appears to be best suited for a small to medium size IT shop.

SharePoint Recommendation Summary

Microsoft's SharePoint is recommended as a project management tool because it is easy to use with many enterprise-focused capabilities. Out of a maximum of 269 points, SharePoint received a score of 200. SharePoint websites can be developed quickly and with minimal amount of training. It can be used as a repository for documents throughout the project lifecycle.

SharePoint excelled in our research because of its versatility of project management functions. It has the capability to handle project status, task management, reporting, issue tracking, risk management and can be integrated with Microsoft Project Management 2010.

SharePoint offers day-to-day development tasks, collaboration on design, development support, and knowledge base repository of product capabilities, quality control and overall project status.

SharePoint could be considered weak because it is difficult to aggregate information across project sites. Additionally, SharePoint does not offer full project management or portfolio management capability on its own. It is meant as a collaboration tool and is considered to be a robust project management tool in conjunction with other Microsoft Project EPM solutions.

Microsoft Project EPM Solutions 2010 Recommendation Summary

Out of a maximum of 269 points, SharePoint received a score of 201. Microsoft Project and Project Server 2010 offer full compatibility and integration with all other Microsoft products including SharePoint. Microsoft's suite of solutions offers a completely robust Project Management environment and is used within the State already. Additional cost would be minimal because the products are already owned, licensed and in-house. Additionally, users in DAS are already familiar with Microsoft products including Project. Training needs are supported through the DAS Microsoft Enterprise Agreement. Additionally all DAS/OIT employees have free training capabilities through Learn IT Ohio by Skill Soft, an online training tool for IT staff. This tool includes robust training for all Microsoft software.

The 2010 version of EPM combines Microsoft's portfolio management capabilities and its centralized project management features into a single, unified product with a common repository and data flow. Previously, these features were in two separate but integrated products. Additionally, the 2010 release of EPM adds support for managing projects and work requests during the demand collection, proposal, business case generation, and approval/rejection phases of a typical project life cycle (Gartner 2010).

Some disadvantages of using Microsoft EPM are that it does not yet provide strong, out-of-the-box "budget versus actual" reporting at the portfolio level, but customers can meet these requirements with

custom fields, and by extending Excel Services integration or with a number of existing add-on modules available from the Microsoft partner network. In addition, EPM provides integration and bridges to third-party financial management systems. Microsoft EPM provides limited preconfigured reports and dashboards. Users will need to create and modify their own reports using Excel and Excel Services, the added Report Wizard, or the Performance Point Dashboard Designer. Alternatively, more-advanced reports can also be developed using SQL Reporting Services, which generally require a skilled IT resource (Gartner 2010).

Implementation Plan Template

About the Implementation Plan Template

The implementation plan template presented in this section is designed to be used as a foundation for implementing project management software within the DAS ITS organization. The plan identifies the key tasks involved in implementing project management software or any software within an organization. The implementation plan was developed using Microsoft Project 2010.

Customizing the Plan

Although every effort has been made to identify all necessary tasks that require completion in order to successfully implement a project management solution, this implementation plan has been designed to allow customization to fit the specific needs of organization and the specific software implementation. The plan has been designed to recalculate dates and duration based on predecessors, resources, and resource allocation.

The implementation plan presented below, displays task name, duration, start and end dates, and predecessors. As DAS IT Services prepares to use this template for project management software implementation, it is important the following items are reviewed and completed before the plan is used.

1. **Enter in a Start Date for your project.** The dates within the implementation plan will recalculate based on the start date entered. The Start Date currently represented in the Implementation Plan is for demonstration only.
2. **Review each task in the plan to determine that it is applicable to this project.** If the task is not applicable, it can be removed from the plan. For example, if you know that you will not conduct software demonstrations with the vendor, tasks 12 and 13 can be removed from the plan.
3. **Add any necessary tasks not in the plan template.** Although every effort was made to identify all necessary tasks, each organization is unique and may have additional requirements when implementing new software. Insert any new tasks to the plan and ensure that the project predecessors are updated as necessary. The project plan duration will then recalculate based on the new information entered.
4. **Resources.** As there is no way to know before the project begins how many resources will be involved with a given implementation, resources were not added to the current implementation plan template. When project resources are identified, they should be added to the implementation plan and assigned to each task within the plan. When adding resources to the plan it is important to add the following information for each resource:
 - Resource Name
 - Maximum Units (Percentage of time/units the resource has available for this project.)
 - Standard Rate
 - Overtime Rate
5. **Duration.** Durations provided within the implementation plan template are provided for demonstration only. Real task durations will be highly dependent on the number of resources assigned to a given task, their availability, and internal department processes. Based on the needs of the organization, durations assigned to tasks within the implementation plan template can be adjusted higher or lower. Changing the duration of any task will recalculate the duration of the entire project and may affect tasks with predecessors significantly.

It is imperative that each of the items listed above be reviewed before the implementation plan template is used to baseline the software implementation project to avoid inaccurate timeframes based on missing tasks, improper resource allocation, or inaccurate predecessors.

Implementation Plan Template

This section displays the implementation plan template with sixty predefined tasks for completing a project management software implementation project. The plan has nine major deliverables or tasks as follows:

1. Identify Resources/Contacts
2. Project Management Software Selection
3. Procure Project Management Software/Licensing
4. Environment Analysis (Hardware)
5. Procure Hardware
6. Hardware Installation/Upgrade
7. User Security
8. Install Project Management Software
9. User Training

Each of the nine major deliverables/tasks is comprised of subtasks that must be achieved in order to complete the major deliverable/task.

The plan template is presented on the following pages in Figure 1 through 3.

Figure 1. Tasks 1 through 19

		Task Name	Duration	Start	Finish	Predecessors
1		Project Management Software Implementation	47 days	Tue 11/2/10	Wed 1/5/11	
2		Identify Resources/Contacts	4 days	Tue 11/2/10	Fri 11/5/10	
3		Identify a Implementation Manager	1 day	Tue 11/2/10	Tue 11/2/10	
4		Identify Network/LAN Resources	1 day	Wed 11/3/10	Wed 11/3/10	3
5		Identify outside resources	1 day	Wed 11/3/10	Wed 11/3/10	3
6		Identify the resources who will provide technical support	1 day	Wed 11/3/10	Wed 11/3/10	3
7		Enter Key Resources into Responsibility Matrix/Contact List	1 day	Thu 11/4/10	Thu 11/4/10	4,5,6,3
8		Distribute Responsibility Matrix/Contact List	1 day	Fri 11/5/10	Fri 11/5/10	7
9		Project Management Software Selection	9 days	Fri 11/5/10	Wed 11/17/10	
10		Review Project Management Software Comparison and Recommendation Document	2 days	Fri 11/5/10	Mon 11/8/10	3,4,5,6
11		Select software solution candidates	1 day	Tue 11/9/10	Tue 11/9/10	10
12		Schedule Software Demonstrations	1 day	Wed 11/10/10	Wed 11/10/10	11
13		Attend Software Demonstrations	2 days	Thu 11/11/10	Fri 11/12/10	12
14		Select a Project Management Software	1 day	Mon 11/15/10	Mon 11/15/10	13
15		Ensure Budgetary Funds	2 days	Tue 11/16/10	Wed 11/17/10	14
16		Procure Project Management Software/Licensing	19 days	Tue 11/16/10	Fri 12/10/10	
17		Determine Number/Type of Users	1 day	Tue 11/16/10	Tue 11/16/10	14
18		Evaluate and Determine Software/Licensing Costs	1 day	Wed 11/17/10	Wed 11/17/10	17
19		Prepare and Submit Software/licensing request to purchase	1 day	Thu 11/18/10	Thu 11/18/10	18,15

Figure 2. Tasks 20 through 41

	 Task Name	Duration	Start	Finish	Predecessors
20	 Obtain approval from Procurement and/or Finance	4 days	Fri 11/19/10	Wed 11/24/10	19
21	 Prepare Purchase Order	2 days	Thu 11/25/10	Fri 11/26/10	20
22	 Send Purchase Order to Vendor	1 day	Mon 11/29/10	Mon 11/29/10	21
23	Receive Software/Licensing	5 days	Tue 11/30/10	Mon 12/6/10	22
24	 Environment Analysis (Hardware)	13 days	Tue 11/2/10	Thu 11/18/10	
25	 Evaluate Current Environment	2 days	Tue 11/2/10	Wed 11/3/10	
26	 Review Hardware requirements for installation of software	1 day	Tue 11/16/10	Tue 11/16/10	14
27	 Evaluate Current Environment against Software Solution	1 day	Wed 11/17/10	Wed 11/17/10	25,26
28	 Determine Environment Needs for Solution Implementation	1 day	Thu 11/18/10	Thu 11/18/10	27
29	 Procure Hardware	24 days	Fri 11/19/10	Wed 12/22/10	
30	 Gather quotes/Identify preferred vendors	2 days	Fri 11/19/10	Mon 11/22/10	28
31	 Prepare and Submit Request to Purchase	1 day	Tue 11/23/10	Tue 11/23/10	30
32	 Obtain approval from Procurement and/or Finance	4 days	Wed 11/24/10	Mon 11/29/10	31
33	 Prepare Purchase Order	2 days	Tue 11/30/10	Wed 12/1/10	32
34	 Send Purchase Order to Vendor	1 day	Thu 12/2/10	Thu 12/2/10	33
35	 Receive Hardware	14 days	Fri 12/3/10	Wed 12/22/10	34
36	 Hardware Installation/Upgrade	3 days	Thu 12/23/10	Mon 12/27/10	
37	 Schedule Hardware Installation/Upgrade	1 day	Thu 12/23/10	Thu 12/23/10	35
38	 Complete Hardware Installation/Upgrade	1 day	Fri 12/24/10	Fri 12/24/10	37
39	 Verify Installation/Upgrade	1 day	Mon 12/27/10	Mon 12/27/10	38
40	 User Security	3 days	Tue 11/16/10	Thu 11/18/10	
41	 Determine User Types/Groups	1 day	Tue 11/16/10	Tue 11/16/10	14

Figure 3. Tasks 42 through 60

	 Task Name	Duration	Start	Finish	Predecessors
42	 Determine permissions for each user type	1 day	Tue 11/16/10	Tue 11/16/10	14
43	Document User Types/Group and Permissions	2 days	Wed 11/17/10	Thu 11/18/10	41,42
44	 Install Project Management Software	3 days	Tue 12/28/10	Thu 12/30/10	
45	 Schedule software installment	1 day	Tue 12/28/10	Tue 12/28/10	23,39
46	 Install software	1 day	Wed 12/29/10	Wed 12/29/10	45,39
47	 Setup User types and permissions in project management software	1 day	Thu 12/30/10	Thu 12/30/10	41,42,46
48	 Verify installation and configuration	1 day	Thu 12/30/10	Thu 12/30/10	46
49	 User Training	47 days	Tue 11/2/10	Wed 1/5/11	
50	 Determine who will conduct training	1 day	Tue 11/2/10	Tue 11/2/10	
51	 Determine who needs to be trained	1 day	Tue 11/2/10	Tue 11/2/10	
52	 Determine what training methods/tools will be used to train users	1 day	Tue 11/16/10	Tue 11/16/10	14
53	 Determine what material needs to be presented during user training	3 days	Wed 11/17/10	Fri 11/19/10	50,51,52
54	 Create user training materials	10 days	Mon 11/22/10	Fri 12/3/10	53
55	Create Administrator training materials	10 days	Mon 11/22/10	Fri 12/3/10	53
56	 Print user training material	2 days	Mon 12/6/10	Tue 12/7/10	54
57	Print administrator training material	2 days	Mon 12/6/10	Tue 12/7/10	55
58	 Schedule User and Administrator Training	1 day	Fri 12/31/10	Fri 12/31/10	48
59	Conduct Administrator Training	3 days	Mon 1/3/11	Wed 1/5/11	55,57,58
60	 Conduct User training	3 days	Mon 1/3/11	Wed 1/5/11	54,56,58

Appendix

A – Scoring Template

The following template was used to evaluate each of the ten project management solutions evaluated as part of this project. The template below shows the maximum score obtainable if all points were awarded to the vendor. The notes column specifies any additional criteria considered while scoring each of the software solutions.

Software Name: <Enter Software Name here>

Evaluation Date:<Enter date software scoring occurred here>

Question	Weight	Score	Points	Notes
Is the software available from a US based vendor?	1	3	3	
Is the software available from an Ohio based vendor?	1	3	3	
Is the software available on State of Ohio State Term Schedule?	1	3	3	
Is the software available from a Minority Business Enterprise (MBE) or Encouraging Diversity, Growth & Equity (EDGE) vendor?	1	3	3	
Are there on-going licensing fees?	3	3	9	Requirement is no
What number of users does the system support?	3	5	15	Must support at least 200
Does the software require maintenance fees?	3	3	9	Requirement is no
Does the software allow source code ownership?	3	3	9	
Is the software open-source?	2	3	6	
What project management functionalities (scheduling, cost control and management, resource allocation, collaboration, communication, quality management, document management, calculate critical path, etc...) does the software offer?	3	5	15	
Does the software offer employee time tracking functionality?	3	5	15	
Does the software offer issue tracking functionality?	3	5	15	
Does the software offer out of the box reporting?	3	3	9	
Describe out of box reporting.	3	5	15	
What type of security does the software offer?	3	5	15	Does software offer comprehensive, granular security?
Does the software allow multiple levels of security?	3	5	15	
Does the software integrate with Active Directory? (Internal and External Users)	2	3	6	
Does the vendor offer training with initial procurement?	2	5	10	
Are there training manuals or job aids available for this software?	2	5	10	
Is the software web based?	3	3	9	
Solution Cost	3	25	75	
Total Score			269	



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RESEARCH

Magic Quadrant for IT Project and Portfolio Management

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Daniel B. Stang

The IT PPM market is showing signs of resiliency and innovation, as many PPM vendors transform themselves to support software as a service and other changing user requirements. The 2010 Magic Quadrant also acknowledges additional emerging and reinvigorated PPM players in the space.

What You Need to Know

Project and portfolio management (PPM) applications can provide visibility into the current state of organizational initiatives, resources and spending through the centralized collection of data from multiple sources and perspectives. Integration across multiple business and IT process domains through PPM functions provides multidimensional views of this data for better visibility and understanding of resource supply versus project (and other work) demand in IT and other project environments. PPM applications can also highlight conditions requiring executive action and decision making. Prospective customers of PPM applications should examine all the functional capabilities (including integration support to third-party products), and identify initial functionality that meets immediate needs.

An appropriate PPM application should match some immediate functional needs and also support a successive road map toward improving PPM maturity. PPM applications are aimed at automating elements of good organizational processes. Where no good organizational process exists, these applications can do one of two things: "dictate" what organizations should do, or support what they already do or want to do well.

Starting simple, while treading lightly on a new set of processes, however, has its benefits. Thus, having the tool provide process suggestions is not necessarily a bad thing when used in careful consideration of organizational readiness and maturity. When making PPM process automation decisions, it is a best practice to weigh both of these options to determine the most successful path. In other words, "What gets me a better, more-efficient, automated PPM process that users can adopt without burying them in administration?"

PPM application value is often initially achieved and increased through the definition and tracking of specific key initiatives. With maturity and a few years of use, integration of a PPM application to appropriate data sources, such as IT service management (ITSM), application life cycle management (ALM) and ERP systems, can expand an application's reach and value even further over time.

The IT PPM Magic Quadrant: Changes in Market Evaluation and Analysis for 2010 Versus 2009

Gartner uses a Magic Quadrant to capture the current state of the IT PPM application market. For more information on the methodology behind Magic Quadrants, see "Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market."

In IT PPM, customer needs have changed dramatically in many areas regarding IT PPM applications because of a number of drivers and conditions. As a result, adjustments were

made to the overall weighting of criteria on each axis making up the IT PPM Magic Quadrant. Table 1 and Table 2 list the relative weights for each of the criteria on each axis. Below are the differences in the weights and the rationale behind the adjustments that were made in this 2010 iteration of the Magic Quadrant.

On the Ability to Execute axis for 2010, the following weighting adjustments were made:

- The *Overall Viability (Business Unit, Financial, Strategy, Organization)* weighting changed from Standard in 2009 to Low in 2010. This adjustment reflects the demand and sales execution occurring in the Niche Players and Visionaries portions of the market, where smaller IT PPM vendors with much lower market share and annual revenue are seeing growth in customer count and in the average number of users per deal. There is enough activity, embedded customers and enterprise growth occurring in the Niche Players and Visionaries areas of the Magic Quadrant to suggest that the overall viability we measure as part of the Magic Quadrant for IT PPM plays a smaller role in this "point in time" market assessment than some of the leading indicators we see in the marketplace.
- The *Sales Execution/Pricing* weighting changed from Low in 2009 to High in 2010 to recognize the value and difficulty of gleaning new customers in an adverse economy, while providing cost-effective and flexible pricing models for customers that cannot secure substantial, capital PPM funding backed by senior management.
- The *Marketing Execution* weighting changed from Low in 2009 to Standard in 2010 to reflect the innovation of vendors in the space in their marketing campaigns as it relates to effective PPM marketing, while faced with limited resources, such as smaller, trimmed marketing budgets, and having to achieve higher revenue and secure new customers in an adverse economy.

On the Completeness of Vision axis for 2010, the following weight adjustments were made:

- The *Business Model* weighting changed from Standard in 2009 to High in 2010 to recognize the need for IT PPM software vendors to reinvent the way they conduct business in the PPM marketplace. Shifting to a software-as-a-service (SaaS) model or including it as another option for customers, for example, involves more than just offering application services hosted at a data center.
- The *Vertical/Industry Strategy* weighting changed from Standard in 2009 to Low in 2010. IT PPM has always been a bit vertical-industry-neutral, aside from maybe financial services and healthcare. If you have an IT department, you probably need some sort of IT PPM system to manage work, even if that IT department is very small. It really makes no difference what industry your company might be a part of — IT PPM is used in companies in varying industries, as long as that company has an IT department. Our group discussions, workshops and sessions at Gartner events for the past several years have worked at a cross-industry level, and have always been rated as highly efficient by the attendees from multiple industries. For these reasons, the weighting on this criterion was scaled back.
- The *Innovation* weighting changed from Standard in 2009 to High in 2010, because innovation is absolutely critical in the IT PPM space, especially now that the technology is quite mature compared with 10 years ago, and new providers have seen a lower barrier to entry with SaaS and cloud technologies, as well as an influx of less-sophisticated users looking for solutions. If software vendors want to survive and thrive in the IT PPM market, they must adjust their company's business models, marketing strategies, products, deployment modes and pricing structures.

Evaluation Criteria: Ability to Execute and Completeness of Vision

To assess providers and their solutions for PPM in the field of IT, we consider their views of the market and their effectiveness in areas such as product development and marketing.

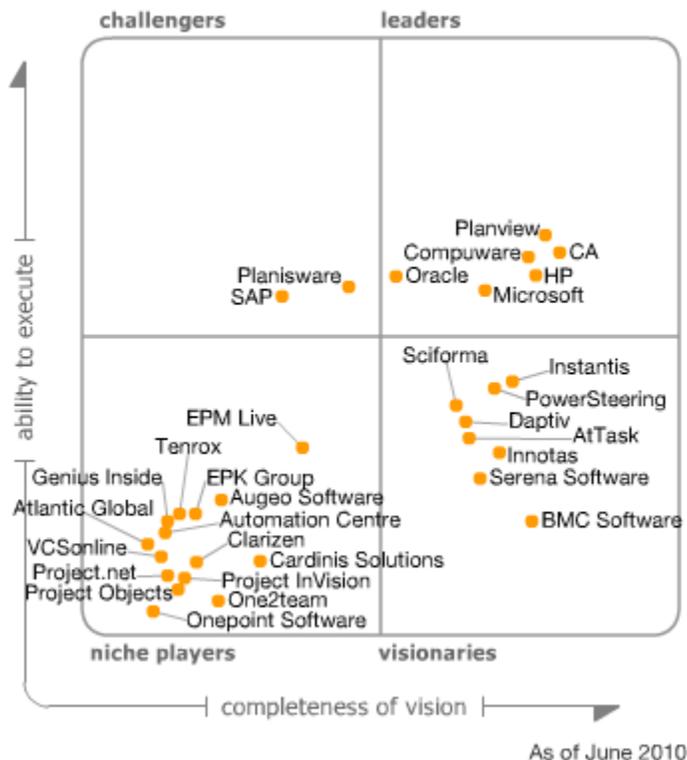
We focus on an application's functional depth and range to address clients' priority requirements, the provider's support commitment and capability, and product direction. We also factor in past performance. Ability to Execute criteria include product depth/feature strength, company viability, sales execution/pricing, market responsiveness and track record, marketing execution, customer experience (including service), and operations/management.

We also consider a provider's vision (as reflected in its products and services), marketing, and expressed or apparent strategies and expectations for the future. Completeness of Vision criteria include market understanding, marketing strategy, sales strategy, offering (product) breadth and strategy, business model, vertical/industry strategy, and innovation.

For more details about our evaluation criteria, see "Evaluation Criteria for IT Project and Portfolio Management Applications."

Magic Quadrant

Figure 1. Magic Quadrant for IT Project and Portfolio Management



Source: Gartner (June 2010)

Market Overview

The PPM market as a whole continues to support internal IT (IT PPM); new product development (NPD); professional services administration (PSA); and traditional architecture, engineering and construction (AEC) environments. The market has matured extensively from project time and schedule support to the holistic management of IT, as well as business initiatives, resources and spending.

In addition to the primary subsegments of IT, NPD, PSA and AEC, PPM vendors are also positioning their products to support three main (but not exclusive) PPM scenarios in varying degrees, including IT planning and control (ITPC), application portfolio management (APM), and enterprise PPM (EPPM). The 2010 Magic Quadrant reflects a continued pursuit to connect core PPM functions to other applications that log and track activities and events (other than formal projects) incurring additional IT expense and consuming resources. Tracking just enough data to account for the support and maintenance of existing applications and IT services can provide further insights into the annual IT consumption of time, people and money.

IT-Based PPM Scenarios

Vendors supporting the use of PPM applications for the management of internal IT work support connections to service desk and performance-monitoring activities, as well as to activities and events involving the life cycle of applications. In doing so, these vendors can feed different types of portfolios for tracking (in addition to projects) IT services or existing applications. Such portfolios can be used to justify certain IT costs or, otherwise, rationalize the IT services or applications managed by the IT department. Gartner identifies this PPM innovation as support for:

- ITPC — The connection of PPM systems to third-party data sources to drive singular visibility for all events in IT. ITPC enables the tracking of events with PPM implications without forcing people to report in or use multiple, disconnected tools and technology. In addition to a technology, ITPC is also a strategy integrating service reporting, PPM functionality and incident management systems.
- APM — The tracking of application assets delivered as a result of an IT deployment project, through the changes made to the application assets, as well as the ongoing costs to maintain and support these assets through to their retirement. APM requires a single data repository or source for all the application and related PPM information.

Some PPM vendors supporting IT departments may also have a product strategy supporting EPPM (see "Defining EPPM and Determining When It Matters"), which Gartner formally defines. The EPPM definition, however, falls outside the scope of this IT-based Magic Quadrant.

Signs of Survival and Recovery

Despite the adverse economy, IT departments of all shapes and sizes — and within various vertical industries — are inquiring about PPM systems and PPM process adoption and automation. In fact, the economy actually drove IT PPM investment and adoption in 2009, due mainly to the following critical customer needs defined by today's internal IT departments:

- More-effectively manage and monitor IT spending in the short term for quick, value-added results.
- Review and improve existing work management practices.
- Centralize and standardize the demand management process.
- Enhance the visibility into the resource pool.
- Optimize and control the allocation of critical resources for project work.
- Increase work administration efficiency.
- More carefully balance inbound work (demand) with existing resources (supply of time, people and money).
- Enhance the communication flow between itself and the business.
- Increase the visibility into existing project status.
- Gain better control over outsourced IT projects.

PPM vendors survived 2009, but not unscathed. Many reported declines in overall new license revenue and cut back on their product development, marketing and end-user conference budgets. Most, however, still managed to add new customers in 2009, and their average number of users per deal increased. As for "recovery," more SaaS-based PPM vendors supporting internal IT (and/or other market subsegments) are appearing and establishing themselves in many different parts of the world. These players either are strongly funded or have a modest, yet self-sustaining, financial position. Some are not yet profitable, but eager enough and flexible enough to support a growing population of PPM prospects and practitioners.

PPM Venture Capital Funding Is Still Curbed but Marginally Accessible

This year's Magic Quadrant recognizes both emerging and maturing PPM vendors in the market, targeting IT departments of varying sizes. These vendors, however, cannot survive on "bookings" or deferred revenue alone, and require continued private or venture capital funding to operate and grow their PPM businesses. Typical funding is averaging \$2

million per round, as opposed to a range of \$8 million to \$14 million per round in recent years.

"Just Enough Process" — The New PPM for IT Requirement

Successful selection, installation, configuration and adoption of an IT PPM application often is dependent on whether the initial scope of the application matches the maturity level of the targeted project environment. Additionally, an initial scope should include the automation of some new PPM processes without introducing too much required process or organizational change management. Initial implementation of a PPM application should be focused on providing "just enough" PPM process to provide first-line visibility into the most critical demand, supply and status reporting issues occurring at the project level and plaguing the internal IT department.

The PPM "Sweet Spot"

So, where are PPM practitioners focusing on just enough PPM process? They are focusing on the PPM "sweet spot."

Through the handling of more than 1,600 PPM-related inquiries in 2009, the Gartner PPM analysts observe many clients focused on enhancing the collaboration, communication and resulting portfolio-level reporting needed to gain first-line visibility into project demand, project status, resource capacity and utilization, and cost estimates versus actuals. The sweet spot primarily represents the communication and reporting improvements that need to be made between the project manager (the one responsible for managing and monitoring the work) and the project sponsor (the one asking for the work and responsible for justifying the need to have the work completed).

In the PPM sweet spot, task and assignment-level time reporting is omitted purposely, making the project manager the "status reporter" within the initial scope of the application. Key tasks or milestones might be tracked, but the sweet spot does not otherwise venture any deeper into more-transactional PPM activities. This enables the target environment to focus on the standardization of project reporting, rather than on the detailed, day-to-day project tracking and management. The sweet spot also avoids pinning the hopes of the entire PPM installation on task and assignment-level time reporting.

From a technology perspective, the PPM sweet spot requires a mix of project, demand, resource, portfolio, and time management features and functions from an appropriate software application. The vendors featured in this Magic Quadrant support the sweet spot in many ways. The key is to match your requirements with a vendor and product that give you this first-line visibility without introducing too much complexity and change management to the processes you are automating.

SaaS PPM Is Expanding, Maturing and Diversifying as Demand Increases

Small PPM budgets, a need for a fast PPM deployment, and functions meeting immediate requirements (without invoking extensive process and behavioral change management) continue to drive the interest and need for SaaS-based PPM systems. In addition to smaller IT departments (generally less than 100 personnel, but also head counts as low as 20 or 30) now requiring PPM systems, larger IT departments in larger companies are also considering this option.

Potential customers new to PPM disciplines or low in PPM maturity can use SaaS as a way to test organizational commitment, assess the potential impact of adopting PPM en masse, and evaluate the organization's adaptability to PPM in terms of people, process and technology. SaaS PPM also enables the target environment to invest incrementally in PPM by making a small, initial investment to "test themselves" and determine their level of "readiness" for PPM disciplines, and then plot a maturity plan using that experience as a baseline, with lower risk than other procurement/deployment options offered by the market.

Through agile development methods and seasonal releases and upgrades (which are often transparent to the customer), SaaS PPM vendors are quickly advancing the capabilities of their PPM application services and pushing improvements out to their customer bases. In cases where some SaaS PPM vendors historically targeted other PPM opportunities first and supported IT PPM as a tertiary business, their products now include increased IT PPM support primarily at the portfolio level. In response to the emergence of SaaS PPM as a

competitive threat, several IT PPM vendors formerly offering only on-premises and hosted deployment options are now transforming their businesses to be "deployment neutral" or "SaaS first."

Two main SaaS models are at play in the IT PPM market:

- Multitenant, single-instance — The application services are provided by managing many IT PPM customers on one application platform delivering PPM features and functions via a subscription-based pricing model.
- Multitenant, multi-instance — The application services are provided by using one data center to manage each customer individually, giving each customer its own application platform delivering PPM features and functions via a subscription-based pricing model.

Choosing a SaaS-based PPM system enables a customer to minimize the risk of a PPM system implementation, because PPM application services can be limited to a 12-month financial commitment with a PPM vendor, as opposed to exponentially higher costs driven by licensing fees, consulting services and three-year maintenance contracts. For this and other reasons, SaaS IT PPM customer counts are on the rise.

Collaboration, Communication and Reporting

Earlier in this report, we identified project, demand, resource, portfolio and time management features as supporting the PPM sweet spot as part of an initial application implementation. To apply just enough process to these features when determining the scope of your PPM implementation, think of the critical collaboration, communication and reporting requirements that must be met to achieve value in your specific circumstance. Connecting the project sponsor more readily to the project manager is easier to achieve at the portfolio level if the application does not force users to perform excessive operations within the application just to get the application to work. PPM applications are, by nature, administrative applications. Any "pain" associated with following an automated PPM process within a PPM application must be justifiable, and bear significant visibility and value. If it does not, then major changes and decisions must be made about the application or the process, or both.

IT PPM "Flirting" With Agile Development Support

Several years ago, during the early stages of market evolution, IT PPM systems borrowed heavily from standards boards focused on project management best practices. Over time, IT PPM applications leveraged proven methods, models and templates for proposing, approving, executing and reporting on IT projects. This reliance on traditional project management best practices makes PPM systems well-suited for managing waterfall-style IT projects. Internal development in IT, however, is shifting more and more toward iterative, rather than waterfall-based, application development. As a result, PPM systems are finding ways to support the PPM-related needs of agile development methods.

Without adding any new, specific functions, PPM systems have the administrative workflow "plumbing" to be configured for agile development environments. Generally speaking, most PPM systems can support any type of project. PPM vendors, however, are not pretending to be "agile development" software vendors. There are PPM benefits that can help development teams manage the body of work that fills a demand pipeline, and an application's workflow flexibility can support some of the communication, collaboration and reporting nuances associated with agile development methods, such as scrum.

Successful use of a PPM system to support agile development teams at more-detailed levels is mainly dependent on how well that system integrates with a developer's typical development processes and environment. Developers do not want to be forced to jump from their development workspaces to an external PPM system to record time on agile development activities. Although most PPM vendors have not fully integrated PPM processes with agile development processes to enable a developer to "stay put" when working on agile activities with PPM reporting implications, there is a growing trend of IT PPM product innovation to provide preconfigured PPM applications support collaboration, communication and portfolio-level reporting for agile development. Vendors with an existing foothold in application development process software markets are already planning to provide "transparent" PPM functionality in integrated development environments (IDEs).

Some Hurdles

Potential buyers of IT PPM systems face many challenges. They need PPM systems, but PPM as a technology alone cannot help an IT department. Investment in PPM requires careful attention to people, processes *and* technology, and not always in that order. As a business strategy and a work management discipline, PPM involves process creation, user adoption and organizational change management. IT PPM is about changing work behaviors at multiple levels within (and sometimes outside of) the IT department. Low PPM maturity is another obstacle, as well as the high cost and risk of implementing a prominent on-premises PPM system.

The economy in 2009 limited many IT departments' financial ability to invest in PPM; however, internally, these organizations are still charged with cutting costs and doing more with less. In some cases, prospects can still make a PPM investment if they can acquire a system for a cost they can allocate as an operating expense. The alternative is to fight for a PPM budget by making a business case for it. PPM business cases can be difficult to make without initial management buy-in, because many of the initial benefits are not quantifiable. PPM systems, however, are critical for providing the structure, context and rationale required to find and make the right investment decisions or to simply avoid drowning in demand due to resource constraints. When management agrees upfront that PPM is a necessity, the business case for an aggressive PPM budget is easier to win. Where there is little or no management support (and, therefore, little or no planned PPM budget), PPM applications can still be implemented to serve the needs of a specific department.

Reporting Is Still Lacking, but There Is Hope

After seeing more than 30 demonstrations of IT PPM applications as part of the Magic Quadrant process, it is safe to say that the reporting services provided by IT PPM products are generally in need of an overhaul. Advanced Web development technologies will soon be applied to IT PPM applications to improve the user's ability to create ad hoc and real-time reports that are accessible online or as spreadsheet outputs. Most PPM systems today provide out-of-the-box reports, and these reports can be customized to a certain extent. Ad hoc reporting in most IT PPM applications, however, still requires several mouse clicks, as well as flipping to and scrolling through screens. When using native reporting features is too cumbersome, the export of raw data into spreadsheets is the most popular alternative.

The presentation of online reporting is still a problem when the user wants a hard copy of a graph or chart generated using PPM data. Customers say formatting and design tools in the PPM application itself are not flexible enough to meet all of their needs, although some of these needs are already satisfied in out-of-the-box reports. Printing custom reports or views normally provided on screen can also be problematic. In cases where a "print screen" function is supported, the actual printouts do not always turn out properly, with charts being cut off by margins and columns pushed to another page with missing headers. In addition to a spreadsheet data dump, end users can also work around reporting issues by employing a "report guru," whose job is to build custom reports for PPM system end users on request.

Although many of the demonstrations we viewed reveal that most reporting services in IT PPM systems are quite "long in the tooth," there is some light at the end of the tunnel. Expect to see in the near term a revolution in reporting services a la PPM for IT, as providers begin to leverage more-advanced Web-based development technologies to improve their systems' reporting capabilities and overall user experience. Some examples include the use of intelligent search capabilities when applying conditions to filters, the ability to apply operands to cells with numeric or other values as a filter condition, a drag-and-drop feature allowing users to change the order of columns in a report view, and the ability to see the filter results change on screen when a condition is applied to a filter — all of which can be done with minimal mouse clicks and less deviation to reporting or filter administration screens.

Market Definition/Description

IT PPM applications primarily automate and centralize the collection of data about demand, costs, schedules and resources for investment prioritization, as well as the execution of the programs and projects delivering new technologies and other IT assets to the business.

They can also be used to assess, justify, rationalize and otherwise control the investment in ongoing IT operations or specific applications.

IT PPM applications integrate information from various sources and roles involved in a single project, a program, an application or an IT service, but also can provide alternative investment scenarios, or aid in the alignment of strategic programs to business objectives, and automate business case creation and evaluation. Through integration with other PPM modules or feature sets, the portfolio management functions of a PPM application enable users to look across projects within a given portfolio over time, account for and recognize nonproject work (which, in addition to formal projects, also is consuming time, people and money), and see the positive or negative impact of demand and committed work on the availability of project resources. Dashboards provide business intelligence and an integrated view of program and project status, application and IT service expenditures, and resource capacity and current utilization levels. Portfolio data gathered from these segments enables project and resource prioritization, and provides a more objective rationale behind project selection at different levels and for different audiences.

In addition to portfolio management, PPM systems provide a core set of features supporting general project or work record creation, resource management and allocation, time reporting for actuals collection, and cost management. The key integration feature within a PPM system is a portfolio approach to the presentation of combined time, cost and resource management data collected in different parts of the system. Time management features help build simple timelines (for example, Gantt charts) or more-complex schedules for programs, projects, activities and task assignments. Resource management enables staff allocation via resource repository. Integration of these functions with project timelines supports resource loading and leveling (natively or via third-party tool integration). Cost management features help track labor hours and other costs, enable (at the high end) earned value management, and enable chargeback or billing of project expenses to internal or external customers.

In addition to core PPM features and integration at the portfolio level, Gartner makes a distinction between portfolio management and portfolio analysis. Portfolio management tends to resemble a list of work items tracked and monitored using key status indicators, such as schedule, budget, variances, internal rate of return, earned value, labor hours, phase and so on, displayed as a table or list, or as entities within a bubble chart. However, to do true portfolio analysis, an end user must also apply risk values to the projects and the deliverables of the projects. Consequently, there is continued interest among end users and prospects in structured risk management, including a risk dashboard (factoring in risk values beyond schedule risk).

Other PPM features support communication management (for example, via issue tracking, approval workflows, discussions and document handling), as well as scope management (beyond simply managing scope in the schedule). Still others experiment with procurement management (for example, for skill sourcing and to collaborate with contractors). Quality management, through the use of methodology templates supporting such approaches as Capability Maturity Model Integrated (CMMI) and Six Sigma, with gate reviews, process metrics and more, enable end users to ensure that deliverables meet specific expectations outlined in internal policies regarding quality.

While integration is always a key aspect allowing PPM systems to provide value, more recently, the integration story for PPM is focusing on third-party data sources that collect and track IT demand requiring the consumption of IT resources. These integration points are being built to connect PPM systems to help desk and trouble-ticket systems, requirements management and quality management systems, software change and configuration management systems on the production and development sides of IT, and other ALM tools. Product innovations in this space, however, are outpacing user adoption, although there are increasing examples of customers with live PPM systems that are starting to move toward the use of these connections.

Inclusion and Exclusion Criteria

The first iteration of the IT PPM product must be generally available (GA) to the public for at least two years. Any product that was released for the first time as a GA product after 1 June 2008 is not included in the Magic Quadrant.

The IT PPM product must be able to demonstrate applicable use as a PPM for IT software system. That is, the company must be able to present evidence that the product is used by IT departments for supporting internal IT work management. A significant presence within IT organizations, verified and substantiated by three IT references, is required.

The company offering the IT PPM product must provide proof of total revenue of \$10 million, or evidence of strong organic growth and/or strong funding. Regarding open-source IT PPM systems, the open-source vendor must produce evidence of a strong set of enterprise-level support services available to end users. Open-source IT PPM vendors must also verify a user community large enough to be self-sustaining, which we are estimating at 10,000 or more total end users (irrespective of the number of companies or "accounts").

IT PPM products should support the core project tracking and management (as well as resource, time and cost management facilities) required by IT customers, with additional support for portfolio-level management and reporting, and a standardized demand collection mechanism.

PPM Is Not Just for Internal IT Departments

Gartner also monitors the market activities of many other PPM providers, because PPM is not just for IT departments. There are PPM applications supporting the delivery of professional services and the delivery of new products to a company's target markets or customers. There are also PPM applications designed for the management of architecture, engineering and construction projects. For a number of reasons, there are PPM vendors that are not covered in our IT-specific PPM Magic Quadrant. Either these companies are not targeting IT PPM specifically, or they do not meet all the inclusion criteria of an IT PPM vendor. Some of these vendors might be vendors operating in markets that are adjacent to or that complement the IT PPM market. Other vendors are targeting PPM markets other than IT, such as NPD, professional services or AEC.

Additional PPM vendors operating in the broader PPM market in some capacity include the following:

- Accept (www.acceptsoftware.com)
- alfabet (www.alfabet.com)
- 37signals Basecamp (www.37signals.com)
- BrightWork (www.brightwork.com)
- Change Director (www.changedirector.com)
- Dekker (www.dekkerltd.com)
- Deltek (www.deltek.com)
- GenSight (www.gensight.com)
- HyperOffice (www.hyperoffice.com)
- IBM (www.software.ibm.com)
- IT4Control (www.it4control.com)
- Journyx (www.journyx.com)
- LiquidPlanner (www.liquidplanner.com)
- Maconomy (www.maconomy.com)
- Metier (www.metier.com)
- Portfolio Decisionware (www.portfolioddecisionware.com)
- Projectplace (www.projectplace.com)
- Qtask (www.qtask.com)
- Replicon (www.replicon.com)
- SemanticSpace Technologies (www.semanticspace.com)
- Skire (www.skire.com)
- Solution Q (www.solutionq.com)
- Versata (www.versata.com)
- WSG Systems (www.wsg.com)

- Zoho (www.zoho.com)

Many of these vendors can differentiate themselves in some way, offer useful innovations, address specific market segments, or promise integration to third-party systems and data sources. Clients should submit inquiries to Gartner when evaluating market alternatives, especially for vendors operating in "non-IT" segments.

Added

The following vendors were added to the 2010 PPM for IT Magic Quadrant:

- Augeo Software
- Automation Centre
- Clarizen
- EPM Live
- Genius Inside
- One2team
- Onepoint Software
- Project InVision
- Project.net
- Project Objects
- Tenrox
- VCSonline

Dropped

There were no vendors removed from this year's Magic Quadrant.

Evaluation Criteria

Ability to Execute

These categories show the vendors' ability to execute (see Note 1).

Table 1. Ability to Execute Evaluation Criteria

Evaluation Criteria	Weighting
Product/Service	Standard
Overall Viability (Business Unit, Financial, Strategy, Organization)	Low
Sales Execution/Pricing	High
Market Responsiveness and Track Record	Standard
Marketing Execution	Standard
Customer Experience	Standard
Operations	Standard

Source: Gartner (June 2010)

Completeness of Vision

These categories show the vendors' completeness of vision.

Table 2. Completeness of Vision Evaluation Criteria

Evaluation Criteria	Weighting
Market Understanding	Standard
Marketing Strategy	Low
Sales Strategy	Low
Offering (Product) Strategy	High
Business Model	High
Vertical/Industry Strategy	Low
Innovation	High
Geographic Strategy	No rating

Source: Gartner (June 2010)

Leaders

IT PPM vendors in the Leaders quadrant meet IT needs by supporting analytic frameworks for application and project portfolios, and can track other types of IT demand, such as minor software change requests, so managers can assess the cumulative impact on resource supply. Product depth in several core PPM areas, such as demand management and analysis, advanced scheduling, and resource and cost management, sets Leaders apart from competitors, as well as portfolio analysis (for investment prioritization). Leaders are increasingly offering a measure of *program* (versus project) management, but vendors in other parts of the Magic Quadrant sometimes have more experience and product depth in this area.

Most Leaders offer multiple deployment options (for example, pilots and staged implementations, as well as on-premises, hosted and a flavor of SaaS). Their vision of the IT PPM market often extends to communication and quality management, with features aimed at improving team performance (for example, via collaborative features and methodology support). At the portfolio level, Leaders can often support multiple types of entities, including projects, programs, applications and IT services.

Leaders tend to have integration partners, as well as core, direct IT PPM service offerings, going beyond implementation and support to include process and organizational consulting. They exhibit a large, often diverse, and growing customer base. Typically, Leaders are well-financed, but an IT PPM vendor with a different business model and/or lower revenue may also have product functionality or other unique traits that deem it a Leader. In either case, Leaders maintain repeat business over time, strengthening their financial viability and enabling them to invest more in the product and its supporting services.

Leaders share many attributes with technology providers we've rated as Visionaries and Challengers, but they are differentiated by comparatively high ratings in many areas, not just a few, with overwhelming customer references supporting their claims submitted as evidence. Consistency between a provider's stated strategy and product direction, and its execution — that is, integrity — is important, along with demonstrated vision, enabling the vendor to address emerging and often vaguely defined market requirements.

Additionally, Leaders tend to be well-positioned to compete in both the ITPC and APM scenarios through a developing integration strategy. Many of them, but perhaps not all, can produce some initial evidence of the use of these integrations in the field. Vendors that perform exceptionally well in the Leaders quadrant can provide overwhelming evidence of these integrations in the field. To date, there are no IT PPM vendors that can demonstrate this elite level of market leadership.

Arguably, however, in 2009 and the first half of 2010, the Leaders quadrant is not really the "hottest" area of the IT PPM market. Increases in buying activity and innovation are occurring rapidly in the domains below the Completeness of Vision axis.

Challengers

Vendors in the Challengers quadrant resemble Leaders in many ways, such as product depth combined with enough experienced technical sales support to effectively reach the market. In fact, most of the description above about vendors in the Leaders quadrant can be applied to Challengers. Often, however, Challengers may offer a product emphasizing one core area, such as project cost management, and be missing product breadth across many other IT PPM functional areas. Additionally, Challengers can be vertical-industry-specific in their IT PPM product development. Challengers are consistently profitable, with a steady foundation of maintenance revenue, a growing installed base and an experienced international sales force with thorough training in the PPM solution. Significant international operations help sustain an ability to execute — in part, by insulating providers from shifts in local market and economic conditions. Challengers are less likely to provide strong evidence supporting ITPC and APM integration use by their customer bases in the field but, nonetheless, have some facilities to support it if asked.

Visionaries

Vendors in the Visionaries quadrant are enjoying steady growth in customer count and demonstrate good market execution. Visionaries may differ from Leaders in product depth or revenue strength, or they may lack the installed base and sales force of a Challenger, but they often share features and traits (for example, methodology support and APM frameworks). Like Leaders, Visionaries seek to enable PPM broadly as a business process, with IT processes and skill sets being only one area addressed. Some Visionaries have been more experimental with business models, and they may approach various markets more broadly, with variable packaging and pricing (for example, SaaS, pricing models supporting fluctuations in license use per month, strategy formulation and measurement). Completeness of Vision ratings can reflect innovative approaches in areas such as resource performance management, pipeline analysis and preconfigured (but tailorable) portals for a variety of enterprise roles. Some Visionaries may exhibit fertile PPM-to-ITPC or APM business opportunities within their installed bases or product potential for supporting the same. The size of a Visionary and financial viability may be compensated by innovative features and functions, as well as more-direct and/or responsive customer care and some influence over future product development.

The Visionaries and Niche Players quadrants of the 2010 IT PPM Magic Quadrant represent the hottest, most active area of the IT PPM market.

Niche Players

Like Challengers, vendors in the Niche Players quadrant may emphasize a specific aspect, such as cost management, versus all-around PPM functionality, or they may have strengths in a specific region. The Niche Players quadrant for 2010 recognizes a number of IT PPM vendors Gartner has been monitoring throughout the years but did not previously track in the Magic Quadrant. Historically, significant midmarket opportunities did not emerge until SaaS proved itself a reliable business model, and also after IT PPM matured as a technology and as a set of proven best practices and processes. More recently, customer needs began to shift toward cost-effective, zero- or low-footprint IT PPM with little complexity. To recognize both the needs of the customers and the response by the marketplace, the 2010 Magic Quadrant for IT PPM added 12 vendors to the Niche Players quadrant. Some are vendors that have withstood a series of economic challenges for 10 or more years, proving their resilience despite modest revenue. Others are newer to the market, well-funded, and building (rather than migrating) their products with the latest Web-based technologies and other software development innovations.

Like Visionaries, Niche Players differ from Leaders in revenue strength or installed base. They may have a less experienced senior management team, or may depend on Web or inside sales to control costs and compete on price. Niche Players rarely have difficulty supporting specific PPM process needs in one or a few select areas. Their overall size in terms of head count puts them close enough to customers to fully understand what improvements should be made to their products to keep their customers happy. When major issues arise, these vendors are among the most responsive to a customer's system troubles.

The Niche Players quadrant is receiving a lot of attention, and sales activity in this area of the Magic Quadrant is comparable to that of the Visionaries quadrant. There are ways to engage Niche Players, if you mitigate any risks due to their size, installed base or revenue strength through careful deployment and contract terms. Many have been providing IT PPM applications for several years and should be able to address common concerns.

Vendor Strengths and Cautions

Atlantic Global

Atlantic Global's IT PPM product is Atlantic Global.

Strengths

- Atlantic Global offers a simple PPM system that is not overwhelming to the common end user.
- Through report generation and portal views, Atlantic Global provides project visibility and some scheduling capabilities, as well as resource allocation, coupled with a core time reporting engine.
- Atlantic Global's pricing is consistent with its level of PPM for IT support. It gives customers some first-line PPM visibility at a low cost of entry, compared with large IT management vendors operating in the market.

Cautions

- For customers that choose to deploy it on-premises or as a hosted solution, Atlantic Global only supports Microsoft SQL Server as the back-end database. Other PPM vendors support Microsoft SQL Server and Oracle databases, as well as some others, such as IBM DB2.
- Although Atlantic Global has some customers in North American markets, it is not actively targeting these markets at this time.
- Atlantic Global does not provide features and functions supporting connection to data sources for driving application or IT service portfolios.

AtTask

AtTask's IT PPM product is @task.

Strengths

- One of @task's strongest features is its ability to support a process-immature PPM customer and then grow in maturity as the customer also grows in PPM process maturity.
- @task's architecture is flexible enough to support multiple Web browsers, Web servers, databases, operating systems and mobile devices.
- @task provides a set of native help desk features as an alternative to integrating with or managing these smaller work requests in established ITSM systems.

Cautions

- Although @task provides direct integration with Microsoft SharePoint and Cognos, as well as partnerships with Boomi and Cast Iron Systems, to support connection to third party ITSM, IT asset management, and ALM processes and tools, there is little evidence suggesting customers are using @task to manage application or IT service portfolios.
- @task's resource capacity planner is intuitive in that it provides real-time resource impact analysis presented graphically through the use of Flash-based technology. This is appropriate and useful when managing smaller subsets of an annual project workload, but cannot scale easily when applying the same capacity-planning features in environments involving hundreds or thousands of projects that are all active and residing in a database at the same time.
- @task's innovation plans favor an on-demand delivery model. On-premises customers may not always have access to 100% of the product functionality.

Augeo Software

Augeo Software's product is Augeo5.

Strengths

- The business intelligence module in Augeo5 v.5.4 adds portfolios and dashboards for project monitoring, capacity planning and risk management, with enhanced drill-down and navigation capabilities.
- The Augeo5 architecture is Java-based and flexible enough to support a variety of Web servers, as well as both Microsoft and Oracle databases.
- Augeo's emerging pure-SaaS PPM product, Planzone, will be leveraged in the upcoming Augeo6 (due for release in December 2010) as a data repository.

Cautions

- Augeo5 is not offered as a SaaS option.
- Augeo5 does not include a preconfigured set of processes supporting the nuances of managing agile development projects.
- Augeo5 does not support APM or IT service portfolio management.

Automation Centre

Automation Centre's IT PPM product is TrackerSuite.Net.

Strengths

- Automation Centre re-emerged from former days as a PPM vendor mainly supporting and leveraging Lotus and Exchange as a PPM computing platform, to a SaaS-first PPM vendor providing similar core PPM functions to the original product, including its e-mail-like user interface (UI).
- Automation Centre provides a cost-effective PPM system delivered in multiple deployment modes and supporting small project groups and work teams, as well as larger departments with hundreds of end users.
- Automation Centre might be smaller than many PPM for IT vendors, but it has also proved its resilience thus far, with a 16-year history and weathering a dot-com bubble burst, as well as two economic downturns.

Cautions

- TrackerSuite.Net does not support integration to third-party ITSM or ALM systems.
- TrackerSuite.Net is not backed by a business partner program, making it more difficult for Automation Centre to pursue growth opportunities or major markets in specific parts of the world.
- TrackerSuite.Net does not support Oracle databases.

BMC Software

BMC Software's IT PPM product is IT Business Management Suite.

Strengths

- BMC completed the incorporation of the ITM Software acquisition, folding the acquired IT Business Management Suite into its marketing campaigns and integrating these assets with the existing BMC product line.
- Current BMC customers can leverage strong integration between the IT Business Management Suite and the existing line of BMC ITSM products. These integrations drive cost and resource data into portfolio view and decision-making capabilities. They also support processes and workflow from operational systems into demand and resource management capabilities within the IT Business Management Suite.
- The IT Business Management Suite took its first steps toward the delivery of IT service portfolio analysis and management via integration with BMC's Service Cost Management solution and other BMC products, coupled with enhanced online reporting and visibility.

Cautions

- BMC's primary marketing focus is on existing BMC customers and on customers interested in driving IT financial transparency. The vendor places limited emphasis on targeting non-BMC customers with IT PPM.

- BMC has yet to address time-reporting issues in the product that could hinder adoption by team members and resources working on projects.
- At this time, BMC does not provide a SaaS version of its PPM system, nor does it demonstrate any native support for the processes and nuances of managing agile development projects.

Cardinis Solutions

Cardinis Solutions' IT PPM product is Cardinis Suite.

Strengths

- Cardinis Suite's architecture is flexible enough to support multiple Web browsers, Web servers, databases and operating systems.
- The Cardinis Suite provides a number of out-of-the-box features and functions, and can also be customized or expanded further to support a customer's specific project methodologies, as well as methods from communities and standards bodies.
- Cardinis' consulting services are a strong differentiator and beneficial to customers that are low in PPM maturity and looking for assistance to improve it.

Cautions

- Cardinis' SaaS strategy is not as strong as strategies from other PPM for IT vendors operating in the market.
- Cardinis Suite does not provide an out-of-the-box configuration supporting the processes and nuances of managing agile development projects. Cardinis is adding features, currently under development, allowing bottom-up and adaptive project management.
- Cardinis does not readily target North American markets at this time.

CA

CA's IT PPM product is CA Clarity PPM.

Strengths

- CA's next-generation version of its Clarity On Demand (SaaS) PPM application represents a major refresh to the base Clarity product, includes many of the core PPM for IT features required by its target customer base, and leverages more advanced Web 2.0 development technologies. This launch signifies the beginning of a greater effort within CA to introduce new features first through SaaS services, and then on to on-premises customers.
- CA Clarity provides a complementary Agile On Demand product designed to work in conjunction with and leverage the core PPM for IT functions already available in the CA Clarity product.
- CA Productivity Accelerator (CAPA) provides a strong set of interactive features and functions to help ease training, navigation, use and process adoption of the product once it is live and in use in the field by a given customer.

Cautions

- Many companies currently invested in on-premises PPM software are facing a rising total cost of ownership issue when they come to the end of their maintenance agreements (specifically, the three-year agreements). While many CA customers are satisfied with their implementations, they are facing ongoing costs for maintenance and increased costs when they need to add more users. CA is addressing this challenge by offering options to existing customers, including the ability to migrate to a SaaS version of Clarity.
- The current on-premises version of CA Clarity does not use enough Web 2.0 and other advanced Web development technologies. The recently released version of Clarity On Demand, as well as other products from other PPM for IT vendors, is using such technologies, specifically in the area of online and ad hoc reporting services, and dashboard design and creation that is more end-user friendly and does not as often require the assistance of an IT administrator.

- Customers of all IT PPM vendors struggle to streamline task and assignment-level time reporting through to back-office financials for enterprise financial reporting purposes. Alternatively, they are instilling a process of taking aggregate data from CA Clarity and manually entering project actuals into the back-office ERP system.

Clarizen

Clarizen's IT PPM product is Clarizen.

Strengths

- Clarizen is a multitenant, single-instance SaaS PPM system supporting customers that manage services, including internal and external IT services.
- Clarizen has a very low cost of entry, offers a trial period for up to five users and can be purchased with a credit card.
- Clarizen can support project teams varying in size that need to enhance overall collaboration, communication and work management visibility.

Cautions

- Clarizen provides a good base of reporting and dashboards, but is also missing some significant support for portfolio management and analysis. For example, Clarizen does not provide or make use of bubble charts.
- Clarizen does not specifically provide or have the vision to provide integrations to third-party ITSM or ALM systems, or processes to drive IT service and application portfolios.
- Clarizen is not yet profitable, but is well-funded and expects to reach profitability by the end of 2011.

Compuware

Compuware's IT PPM product is Changepoint.

Strengths

- Changepoint's use of Silverlight technology enhances its user interface and the user's experience while interacting with the system.
- Recent improvements to Changepoint's system, including the project worksheet, alleviate some prior usability issues involving the creation, editing and management of tasks and assignments within Changepoint's native project management features.
- Changepoint's integration options enable customers to leverage Microsoft BizTalk Server or other third-party enterprise service buses (ESBs) from Oracle, SAP and IBM. Customers can use this integration to bring third-party data into Changepoint for use with native PPM data residing in Changepoint.

Cautions

- The Changepoint PPM system exclusively leverages Microsoft SQL Server and, therefore, does not provide support for Oracle databases.
- A significant majority of Changepoint customers are using the on-premises version of Changepoint versus hosted or SaaS options. Compuware is evolving the business to increase the adoption of its SaaS and hosted versions. Incentive programs, adoption monitoring and options such as giving customers control over their own upgrade cycle are among some of the ways Compuware is evolving to match changing market needs.
- Changepoint's architecture is chiefly based on Microsoft enterprise computing technologies, and does not support all alternative Web browsers or Web servers. Firefox browser support, however, will be available as of July 2010.

Daptiv

Daptiv's IT PPM product is Daptiv PPM.

Strengths

- More than one-third of Daptiv's installed base of customers are using 500 or more licenses in their contracts with Daptiv.

- Daptiv introduced Daptiv Scrum to the market in 2009, offering base PPM support for agile development environments. Additionally, Daptiv Connect provides an integration bridge to third-party agile methodology and process tools, where required.
- Because Daptiv is a single-instance, multitenant PPM offering of application services, the vendor can deploy features and functions to customers quickly and at a cost-effective price.

Cautions

- There has been a significant number of recent changes at the executive level of individuals responsible for leading the company and managing its IT PPM products and services.
- As it relates to support for program management, Daptiv does not provide an entity or record type for a program, with specific attributes associated with it distinguishing, for example, a program record from a project record in the Daptiv application.
- Daptiv PPM is only offered as a multitenant, single-instance SaaS IT PPM application. On-premises or hosted versions are not available.

EPK Group

EPK Group's IT PPM product is EPK-Suite.

Strengths

- The use of a single database in a typical customer implementation simplifies the care, feeding and manipulation of the EPK-Suite as a PPM for IT application.
- EPK-Suite enables users to customize the product through strong integration with Microsoft SharePoint to support time reporters through business executives.
- EPK-Suite's time-reporting capability (which can be decoupled or independent of project tasks or assignments in the system) and resource capacity and utilization reporting (including resource heat maps) are highlighted strengths of the application.

Cautions

- EPK-Suite does not provide support for pairwise comparison methodologies, but does offer suitable functionality for business-case generation.
- EPK-Suite does not offer a SaaS deployment option, and exclusively supports Microsoft SQL Server as the back-end database. Other vendors support both SQL Server and Oracle as the back-end database.
- EPK-Suite's native reporting services could use improvement either through internal development or through an OEM relationship with a suitable technology partner.

EPM Live

EPM Live's PPM product is EPM Live.

Strengths

- Despite challenges posed by the economy and to the vendors in the PPM for IT space, EPM Live gleaned a significant number of customers in 2009 in relation to the competition.
- The use of Microsoft Office SharePoint Server as the EPM Live PPM platform is visionary and lucrative. SharePoint is readily being adopted and supported by many PPM for IT vendors via integration strategies or direct OEM support.
- EPM Live provides a strong alternative to traditional desktop project scheduling and management, coupled with equally strong collaboration, communication, workflow and document management features.

Cautions

- EPM Live is exclusively based on Microsoft computing platforms and, therefore, only supports SQL Server as the back-end database. In addition to SQL Server, some

competitors may also support Oracle and other databases, in addition to SQL Server.

- EPM Live can be configured to support the processes and nuances of managing agile development projects, but an out-of-the-box configuration is not available. EPM Live will include this in its June 2010 release.
- EPM Live's native portfolio management capabilities lack support for decision frameworks and prioritization capabilities. Additional features are under development.

Genius Inside

Genius Inside's IT PPM product is Genius Project.

Strengths

- In addition to supporting up to thousands of end users, Genius Inside can also support very small project workgroups (as few as five end users). It is one of only a few vendors that support IBM middleware technology integration to products such as Domino and DB2.
- The addition of a SaaS option extends Genius Inside's ability to support the needs of its customers and prospects.
- Genius Inside has a much stronger presence in Europe than most North American-based PPM for IT vendors.

Cautions

- For customers interested in deploying a PPM system on-premises (the deployment mode currently employed by a large majority of Genius Inside's installed base), Genius Project does not support Microsoft SQL Server or Oracle databases as the back-end database to its product. A large majority of PPM for IT vendors support one or both of these databases. Genius Inside does, however, provide integration with these databases and other data sources to bring outside data into the Genius Project system.
- Genius Inside does not yet fully support integration with Microsoft SharePoint. Many PPM for IT competitors leverage SharePoint integration as a complement to their products.
- Genius Inside is just beginning to penetrate North American markets.

HP

HP's IT PPM product is HP PPM Center.

Strengths

- When used in conjunction with and integrated with other HP IT management products, HP's PPM Center is one of the stronger ITPC PPM systems available in the market.
- Preconfigured workflow models included in HP PPM Center provide good starting points for customers embarking on IT PPM as an investment for the first time.
- The addition of the Financial Planning and Analysis dashboards, as part of the greater HP PPM for IT strategy for IT financial management, fills a gap in HP PPM Center's features for translating IT work management efforts into a context understandable to the business.

Cautions

- HP has yet to develop a SaaS strategy competitive and successful enough to challenge competitors in the market.
- HP's primary marketing strategy for HP PPM Center is heavily focused on existing HP customers, although the vendor's investments in the product strive to reach and support a wider audience of IT PPM practitioners.
- HP PPM Center only supports Oracle as the back-end database. This caution does not apply, however, if customers choose HP's SaaS option.

Innotas

Innotas' IT PPM product is Innotas PPM.

Strengths

- Innotas' balance of core PPM for IT functionality tied to strong service and support delivery enables customers to manage work at portfolio and project levels, and receive the help they need when issues arise.
- Customers cite Innotas' support and consultative services as strengths, delivering personalized attention and a reasonable level of responsiveness.
- The acquisition of Helpstream, a SaaS-based social CRM system, is both ambitious and visionary. This is the first acquisition of a SaaS-based service automation technology by a SaaS PPM for IT pure-play vendor in the market.

Cautions

- Innotas exclusively focuses on North American PPM markets.
- Customers would like to see more flexibility in Innotas' reporting capabilities. Current work-arounds include data export to spreadsheets for further manipulation and presentation.
- Innotas PPM does not allow users to link tasks in one project to tasks in another project to create interdependencies. An upcoming 2010 release includes upgrades to the project-scheduling engine, including the ability to associate a task in one project to a task in another project.

Instantis

Instantis' IT PPM product is EnterpriseTrack PMO Edition.

Strengths

- Instantis' recent improvements to its online reporting services and dashboard building are visionary and innovative. EnterpriseTrack PMO Edition leverages more-advanced Web 2.0 development technologies, such as the use of intelligent search and operands for advanced filtering. Instantis also Improved Excel export capabilities, and significantly reduced the number of steps required to generate online and ad hoc reports. EnterpriseTrack PMO Edition may have set a new precedent in PPM for IT reporting services.
- EnterpriseTrack PMO Edition enables users to create high-level business strategies and define the metrics that will be used to measure the success of the strategies, as well as the projects that will need to be completed to collect the data used for this type of analysis.
- Instantis' multitenant, multi-instance SaaS platform enables customers to use different versions of the system. It does not force an entire SaaS user community to migrate simultaneously when the base SaaS product undergoes major architectural or infrastructure changes.

Cautions

- Instantis is lacking in some advanced resource capacity planning features, which are under development and not available in the product today.
- As it continues to find some traction in IT departments, Instantis targets IT mainly at the portfolio level. There are few or no native help desk features offered in EnterpriseTrack PMO Edition as an alternative to established ITSM systems. Other PPM for IT vendors are doing more than integrating with existing ITSM systems. They are actually building alternatives for their customers.
- Although Instantis' vision has shifted more toward IT opportunities, a large majority of its customer base is using its products for other purposes. This limits Instantis' ability to identify key IT product requirements within its own customer base for future product innovations in the vendor's IT-based product development.

Microsoft

Microsoft's IT PPM product is EPM.

Strengths

- The 2010 version of EPM is built on Microsoft SharePoint Server, providing support and inclusion of SharePoint's business collaboration capabilities, a common user interface, data integration, search functions, and reporting infrastructures.
- The 2010 version of EPM combines Microsoft's portfolio management capabilities and its centralized project management features (previously in two separate but integrated products) into a single, unified product with a common repository and data flow.
- The 2010 release of EPM adds support for managing projects and work requests during the demand collection, proposal, business case generation, and approval/rejection phases of a typical project life cycle.

Cautions

- Currently, Microsoft only offers a SaaS version of EPM through its network of certified EPM hosting partners.
- Microsoft EPM provides limited preconfigured reports and dashboards. Users will need to create and modify their own reports using Excel and Excel Services, the added Report Wizard, or the PerformancePoint Dashboard Designer. Alternatively, more-advanced reports can also be developed using SQL Reporting Services, which generally require a skilled IT resource.
- Microsoft EPM does not yet provide strong, out-of-the-box "budget versus actuals" reporting at the portfolio level, but customers can meet these requirements with custom fields, by extending Excel Services integration or with a number of existing add-on modules available from the Microsoft partner network. In addition, EPM provides integration and bridges to third-party financial management systems.

One2team

One2team's IT PPM product is One2team.

Strengths

- One2team enables customers to employ a SaaS PPM system for its most complex IT projects. Customers can purchase One2team to manage just a single, yet complex project or program requiring extensive collaboration, or to manage hundreds of projects annually.
- One2team has a strong presence in Europe as a PPM for IT vendor, and focuses mainly on providing a portfolio-level line of visibility to help customers track, monitor and measure their execution of complex programs and projects.
- One2team can be deployed as an "umbrella" portfolio system, supporting existing PPM environments where other project management software tools are managing transactional execution activities at task and assignment levels. In this way, One2team brings portfolio-level visibility to these environments.

Cautions

- One2team does not provide strong, direct integration to third-party ITSM and ALM applications, hindering its ability to build IT service or application portfolios.
- One2team does not exemplify strong North American PPM for IT market penetration, but rather, is mainly successful in Europe.
- One2team does not support Microsoft SQL Server as its back-end database. Many competitors support Microsoft SQL Server, as well as a number of other databases.

Onepoint Software

Onepoint Software's IT PPM products are Onepoint Project Enterprise Server (on-premises) and Onepoint Enterprise Cloud (SaaS).

Strengths

- Onepoint is one of just a select few open-source/commercial PPM vendors operating in the market.
- Onepoint has a strong presence in Europe as a PPM for IT vendor.

- Onepoint's focus on agile development support within its Project Enterprise Server product includes the imminent release of integration with agile development tools and methods, including Atlassian's (www.atlassian.com) JIRA.

Cautions

- Despite inclusion of a SaaS-based version of its product, a majority of Onepoint's customers deploy Onepoint on-premises.
- Onepoint's installed base is made up of more non-IT customers than IT customers, which limits the company's ability to draw new IT PPM product requirements from its existing customers.
- Onepoint does not focus on pursuing ITPC or APM PPM scenarios.

Oracle

Oracle's IT PPM product is Primavera.

Strengths

- Oracle's Primavera offering is one of the most mature project planning and scheduling systems in the PPM for IT market. It is geared toward projects with multiyear durations and a level of complexity exceeding the capabilities provided in many established, client- and server-side scheduling systems.
- Oracle's financial viability provides strong buoyancy for the Primavera product.
- Enhanced integration with P6 and Microsoft Project Server 2007 enables users to pull aggregate data from P6 and multiple instances of Project Server into the Oracle Primavera Portfolio Management piece for added portfolio analysis and decision-making support.

Cautions

- Oracle does not provide a SaaS version of its Primavera product, although Oracle On Demand and partner hosting solutions are available to help fill this need. In addition, Oracle offers term leasing for licensing.
- The use of Primavera requires a level of project management maturity at planning and scheduling levels within an IT department that is much higher than where many IT departments sit today.
- Primavera does not natively support agile development-based project management, but can be configured to support some of the management and reporting needs of agile development environments. In combination with Oracle's (or third-party) business intelligence products, Primavera creates burndown charts supporting agile methods, such as scrum.

Planisware

Planisware's IT PPM product is Planisware.

Strengths

- Planisware features a flexible architecture that enables the system to support a variety of databases, ERP systems, operating systems, document management systems, requirements management systems, Web servers, Web browsers and project-scheduling/planning systems.
- With its added "road mapping" capability, Planisware now enables users to plan a product or IT strategy using a timeline metaphor, and also synchronize elements within a portfolio road map to project scheduling or product/application road map elements.
- Customers cite the support and service they receive from Planisware as a strength of the provider.

Cautions

- Planisware's SaaS strategy is much less mature than strategies from other PPM for IT vendors operating in the market.
- Planisware's reporting services, particularly in the area of ad hoc/custom report generation by project managers, could be improved to leverage more-advanced

Web-based development technologies, such as the use of intelligent search capabilities to apply a condition to a filter, drag/drop arrangement of columns on-screen to suit the end user's preferences, and the ability to see results refreshed in real time as conditions are added to filters.

- Planisware provides limited support for the processes and nuances of managing Agile development projects. Planisware does provide some Agile support through partnerships.

Planview

Planview's IT PPM product is Planview Enterprise.

Strengths

- Planview completed (both internally and externally) a business transformation to more readily market, sell and service customers interested in using Planview Enterprise as a SaaS solution.
- Road-mapping technology added to Planview Enterprise enables users to map out and plan the project or work life cycle associated with an application or other IT asset or "product" using a Gantt-like graphical view.
- Planview's Remote Advisory Service enables customers to purchase blocks of consulting hours to be delivered remotely, reducing overall consulting and ongoing implementation costs. This remote service provides assistance or "hand-holding" during a planned extension of an existing implementation regarding the inclusion and use of additional features and/or the automation of additional process areas.

Cautions

- Planview Enterprise is exclusively based on Microsoft computing environments. There is little or no support for alternative Web browsers or Web servers. The product does, however, support Firefox.
- Planview Enterprise is not designed or priced for smaller IT organizations (those with 30 or less in personnel) interested in automating task and assignment-level time reporting as part of a PPM for IT deployment.
- Customers previously attempting to streamline task and assignment-level time reporting through to back-office financials for enterprise financial reporting purposes find this to be extremely difficult, and instead opt to instill a process of taking aggregate data from Planview Enterprise and manually entering project actuals into the back-office ERP system.

PowerSteering

PowerSteering's IT PPM product is PowerSteering.

Strengths

- PowerSteering is a multitenant SaaS IT PPM product that can be deployed rapidly as application services.
- The use of data objects in PowerSteering enables end users to create and track entities such as programs, projects, applications, IT services and IT assets, as well as smaller application management work items, such as bugs/errors, application enhancements and application change requests.
- PowerSteering's core portfolio management capabilities target the PPM sweet spot, and the product is well-positioned for the IT PPM market (as well as other PPM market subsegments), matching many of the key requirements and maturity levels of its target customers.

Cautions

- Although users can configure the system for agile development work management, PowerSteering does not provide a prepackaged configuration of its product supporting the processes and nuances of managing agile development projects.
- While PowerSteering has continued to improve its ad hoc reporting capabilities in recent releases, its reporting interface could be more user friendly by reducing the number of required steps to create ad hoc reports and by improving the navigation. These improvements are planned for subsequent releases.

- Although IT presents a growing business opportunity for PowerSteering, PPM is the only product PowerSteering offers. In addition to a core IT PPM product, some competitors also provide other IT management applications in other IT process domains, such as ITSM and/or ALM.

Project InVision

Project InVision's IT PPM product is Project InVision IT PPM On Demand.

Strengths

- Project InVision provides a SaaS-based PPM system, in addition to on-premises and hosted versions at a cost-effective price. Customers can also opt to bring Project InVision on-premises based on a subscription pricing model.
- Project InVision offers a core set of PPM features supporting a number of work environments with varied levels of PPM process maturity.
- Despite its size and modest financial position, Project InVision represents more than 16 years of PPM market experience, and weathered a number of economic challenges, including a dot-com bubble burst, an economic downturn, and the current economic storm that still lingers today.

Cautions

- Project InVision does not provide portfolio management and analysis capabilities specific to application rationalization and APM.
- Project InVision does not include ITPC as part of its overall corporate or IT PPM product vision and, therefore, lacks any prepackaged integration points to third-party ITSM applications or data sources.
- For customers interested in deploying Project InVision on-premises (the deployment mode employed by more than 50% of its customer installed base), Project InVision only supports Microsoft SQL Server as the back-end database to its product. A number of PPM for IT competitors also support Oracle and other databases.

Project Objects

Project Objects' IT PPM product is Project Objects.

Strengths

- Project Objects has an established presence in Europe. The largest customers of Project Objects are in the oil and gas, and engineering and construction industries.
- The management of projects at the portfolio level, as well as management of demand and resources, combined with advanced analytical capabilities, is a key strength of the Project Objects' system.
- The addition of stage-gate methodology support, as well as enhanced demand management features, improves Project Objects' ability to support the extended project life cycle.

Cautions

- Project Objects does not provide a SaaS version of its IT PPM product. The first iteration of such, however, is due for release in 2010.
- Project Objects' presence in IT is not as strong as other PPM for IT vendors in the space, nor does it support the processes and nuances of managing agile development projects.
- Project Objects does not yet have an ITPC or APM strategy.

Project.net

Project.net's IT PPM product is Project.net.

Strengths

- Project.net is one of just a select few open-source/commercial PPM systems available in the market.

- In addition to supporting up to thousands of end users, Project.net can also support very small project workgroups (approximately 75% of Project.net's customer base have installed 100 or fewer licenses in their project environments).
- Integration with Pentaho BI adds a data warehouse and online analytical processing cubes to the Project.net IT PPM product.

Cautions

- Although the vendor reports that it can support customers that want to configure its product to agile development work, Project.net does not feature a preconfiguration supporting the processes and nuances of managing agile development projects.
- Project.net does not provide integration points to ALM tools for use as data sources driving APM.
- Although Project.net provides multiple deployment options, including a SaaS option, the vendor's customer base is largely made up of on-premises customers. For those interested in implementing Project.net on premises, the vendor only supports Oracle as the back-end database. In addition to Oracle, many competitors also support other databases from Microsoft, IBM and others.

SAP

SAP's IT PPM product is SAP Portfolio and Project Management (formerly SAP RPM).

Strengths

- Existing SAP customers can leverage SAP as a single source for portfolio-level reporting when the goal is mainly to emphasize cost-benefit analysis of existing capital and operational IT investments.
- SAP rewrote the SAP RPM UI technology foundation, which was formerly based in Java, to Advanced Business Application Programming, providing additional end-user customization of the portfolio management UI.
- In rewriting the SAP RPM UI foundation, SAP merged cProjects with RPM, adding native project scheduling and extending resource management functionality to the SAP Portfolio and Project Management product through enhanced integration and a common, yet proprietary, application code base.

Cautions

- SAP's primary product strategy is heavily focused on existing SAP customers. The vendor sees only limited success in targeting non-SAP customers as PPM customers.
- SAP's RPM is not available as a SaaS deployment option.
- For smaller IT organizations (roughly 50 or less in personnel), SAP Portfolio and Project Management is only suitable when the customer has an existing investment in the SAP Business Suite and aims to achieve visibility and control over human and financial capital. SAP offers competitive pricing for IT departments of this size.

Sciforma

Sciforma's IT PPM product is PSNext.

Strengths

- Sciforma's PSNext offers many modes of deployment. Customers can replace a set of spreadsheet-based PPM processes by providing core PPM functions in on-premises, hosted or SaaS modes.
- Sciforma's token-based pricing model is unique and can be cost-effective, especially when the customer requires floating licenses. This flexibility to support fluctuations in use provides an alternative to the standard per-seat model that can sometimes be an obstacle to enterprisewide deployment.
- PSNext's flexible architecture supports a variety of databases, Java EE application servers and operating systems, including Mac OS X.

Cautions

- Sciforma's interface could be improved to enhance the user's experience in ways supporting the casual user.

- Customers would like to see improvements in how timesheets are applied to projects in PSNext — currently described as a "heavy" process.
- Sciforma includes SaaS in its product strategy and market messaging, but SaaS is not fitting its business model as well as traditional deployment modes do. An overwhelming majority of PSNext customers are using the product on-premises.

Serena Software

Serena Software's IT PPM product is Serena Project Portfolio Management.

Strengths

- Serena Project Portfolio Management's core portfolio management, resource management and investment-tracking capabilities match the needs of many IT departments interested in PPM for IT.
- Serena's Agile Work Manager integrates with Serena Project Portfolio Management to include agile work management at the portfolio analysis level.
- Serena is not just a PPM for IT vendor. It offers a number of complementary products supporting application management, including a set of SharePoint development solutions and ALM products, such as Dimensions.

Cautions

- For customers interested in deploying a PPM system on-premises (the deployment mode currently employed by a large majority of the existing Serena PPM installed base), Serena Project Portfolio Management only supports SQL Server. Some competing PPM for IT vendors can support additional databases from Oracle and IBM.
- Serena's online ad hoc reporting module pulls data from the investment management portion of the solution, but it does not expose resource data, making it difficult to extract resource data from Serena Project Portfolio Management and into ad hoc reports.
- Additional enhancements to reporting services within Serena Project Portfolio Management, taking advantage of more-advanced Web development technologies, would improve the user's ability to define, create and generate reports more quickly and easily. Serena plans to add online ad hoc resource reporting views in its 4Q10 release to its existing reporting services, for resource reporting and other PPM-related application use.

Tenrox

Tenrox's IT PPM product is Tenrox Project Workforce Management.

Strengths

- Tenrox's key strength is the vendor's deep experience and success as a provider of time-reporting systems supporting PPM environments, as well as non-PPM environments.
- Tenrox completed a successful shift toward SaaS-based solutions for its customers, and SaaS is a key component of its overall strategy as a technology provider.
- As a supplier of robust time-reporting and capacity-planning applications, Tenrox demonstrates strong experience in integrating with existing applications and computing platforms.

Cautions

- Tenrox does not provide agile development-based project management features and functions in Tenrox Project Workforce Management.
- Tenrox's ability to provide advanced project prioritization and selection support in its product is under development.
- Tenrox has no intent to pursue additional portfolio management development supporting APM.

VCSonline

VCSonline's IT PPM product is VPMi Professional.

Strengths

- VCSonline offers its PPM for IT product, VPMi Professional in SaaS, hosted and on-premises modes.
- VCSonline offers a core set of PPM for IT functions at a low and cost-effective price.
- As a SaaS solution with just enough PPM process support, VPMi Professional can be installed rapidly without a significant amount of professional services and consulting required.

Cautions

- VCSonline is not actively pursuing ITPC or APM PPM scenarios.
- VCSonline does not provide strong integration to third-party ITSM and ALM products.
- VCSonline cannot be used to perform application rationalization.

Recommended Reading

"Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market"

"Defining EPPM and Determining When It Matters"

"PPM Markets: From General Purpose to Market Segments to Enterprise"

Note 1

Evidence

This Magic Quadrant follows the methodology outlined in "Magic Quadrants and MarketScopes: How Gartner Evaluates Vendors Within a Market."

In addition to the research generated during the formal Magic Quadrant, the IT PPM Magic Quadrant also draws from a number of resources, including vendor briefings, ongoing client inquiries and interactions, face-to-face meetings and dialogue at Gartner events (such as the Gartner PPM Summits in North America and Europe), customer reference calls, the primary PPM research team at Gartner, and the larger PPM Research Community, as well as many other sources. We also use other analysts in Gartner in the Application Management and Governance group and analysts covering ITSM.

Key analysts who contributed to this year's Magic Quadrant process include:

- Audrey Apfel
- Donna Fitzgerald
- Robert Handler
- Mike Hanford
- Theresa Jones
- Matt Light
- Lars Mieritz
- Laurie Wurster

Vendors Added or Dropped

We review and adjust our inclusion criteria for Magic Quadrants and MarketScopes as markets change. As a result of these adjustments, the mix of vendors in any Magic Quadrant or MarketScope may change over time. A vendor appearing in a Magic Quadrant or MarketScope one year and not the next does not necessarily indicate that we have changed our opinion of that vendor. This may be a reflection of a change in the market and, therefore, changed evaluation criteria, or a change of focus by a vendor.

Evaluation Criteria Definitions

Ability to Execute

- **Product/Service:** Core goods and services offered by the vendor that compete in/serve the defined market. This includes current product/service capabilities, quality, feature sets and skills, whether offered natively or through OEM agreements/partnerships, as defined in the market definition and detailed in the subcriteria.
- **Overall Viability (Business Unit, Financial, Strategy, Organization):** Viability includes an assessment of the overall organization's financial health, the financial and practical success of the business unit, and the likelihood of the individual business unit to continue investing in the product, to continue offering the product and to advance the state of the art within the organization's portfolio of products.
- **Sales Execution/Pricing:** The vendor's capabilities in all presales activities and the structure that supports them. This includes deal management, pricing and negotiation, presales support and the overall effectiveness of the sales channel.
- **Market Responsiveness and Track Record:** Ability to respond, change direction, be flexible and achieve competitive success as opportunities develop, competitors act, customer needs evolve and market dynamics change. This criterion also considers the vendor's history of responsiveness.
- **Marketing Execution:** The clarity, quality, creativity and efficacy of programs designed to deliver the organization's message in order to influence the market, promote the brand and business, increase awareness of the products, and establish a positive identification with the product/brand and organization in the minds of buyers. This "mind share" can be driven by a combination of publicity, promotional, thought leadership, word-of-mouth and sales activities.
- **Customer Experience:** Relationships, products and services/programs that enable clients to be successful with the products evaluated. Specifically, this includes the ways customers receive technical support or account support. This can also include ancillary tools, customer support programs (and the quality thereof), availability of user groups and service-level agreements.
- **Operations:** The ability of the organization to meet its goals and commitments. Factors include the quality of the organizational structure including skills, experiences, programs, systems and other vehicles that enable the organization to operate effectively and efficiently on an ongoing basis.

Completeness of Vision

- **Market Understanding:** Ability of the vendor to understand buyers' wants and needs, and to translate those into products and services. Vendors that show the highest degree of vision listen and understand buyers' wants and needs, and can shape or enhance those with their added vision.
- **Marketing Strategy:** A clear, differentiated set of messages consistently communicated throughout the organization and externalized through the website, advertising, customer programs and positioning statements.
- **Sales Strategy:** The strategy for selling product that uses the appropriate network of direct and indirect sales, marketing, service and communication affiliates that extend the scope and depth of market reach, skills, expertise, technologies, services and the customer base.
- **Offering (Product) Strategy:** The vendor's approach to product development and delivery that emphasizes differentiation, functionality, methodology and feature set as they map to current and future requirements.
- **Business Model:** The soundness and logic of the vendor's underlying business proposition.
- **Vertical/Industry Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of individual market segments, including vertical industries.
- **Innovation:** Direct, related, complementary and synergistic layouts of resources, expertise or capital for investment, consolidation, defensive or pre-emptive purposes.

- **Geographic Strategy:** The vendor's strategy to direct resources, skills and offerings to meet the specific needs of geographies outside the "home" or native geography, either directly or through partners, channels and subsidiaries as appropriate for that geography and market.
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