**ecostar plan**

**Microsoft Project Implementation Needs Assessment Questionnaire (Planner, Project for the Web, Project Online)**

# ecostar plan

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# Microsoft Project Implementation Needs Assessment Questionnaire (Planner, Project for the Web, Project Online)

## Methodology

1. What project management methodologies do you currently use?
   ☐ Traditional (Waterfall)
   ☐ Agile (Scrum, Kanban, etc.)
   ☐ Hybrid
   ☐ Other: _____
2. Do you have standardized project processes and templates?
   ☐ Yes
   ☐ No
   ☐ Partially
3. What are the main deliverables and reports you produce regularly?
   ☐ Project plans
   ☐ Status reports
   ☐ Resource allocation reports
   ☐ Other: _____

## Current Usage

4. What PM tools do you currently use?
   ☐ Project Online (PWA)

☐ Project Professional
☐ Other: _____
5. What key features do you use regularly?
☐ Planning
☐ Task tracking
☐ Resource management
☐ Reporting
☐ Other: _____
6. Do you have customizations or integrations?
☐ Yes: _____
☐ No

## Collaboration & Reporting

7. What are your collaboration needs on project plans?
☐ Internal only
☐ Internal and external
☐ No specific need
8. What types of reports are essential?
☐ Task tracking
☐ Resource utilization
☐ Cost analysis
☐ Other: _____
9. Do you have resource management requirements?
☐ Yes
☐ No

# Project Complexity

10. What is the typical project size/complexity?
    ☐ Small (< 100 tasks)
    ☐ Medium (100-500 tasks)
    ☐ Large (500-1000 tasks)
    ☐ Very Large (>1000 tasks)
11. Do you have projects with specific needs?
    ☐ Yes: _____
    ☐ No
12. What are the main challenges on complex projects?
    ☐ Resource management
    ☐ Detailed reporting
    ☐ System integrations
    ☐ Other: _____

# Strategy & Priorities

13. What are the main transition objectives?
    ☐ Modern interface
    ☐ Improved collaboration
    ☐ New features
    ☐ Other: _____
14. Are you willing to adapt processes?
    ☐ Yes
    ☐ No
    ☐ Partially

15. Would you consider a hybrid approach?
    ☐ Yes
    ☐ No
    ☐ Maybe

# Time Tracking

16. Do you currently use a time tracking tool?
    ☐ Yes: _____
    ☐ No
17. What time tracking features do you need?
    ☐ Time entry by project/task
    ☐ Timesheet approval
    ☐ Payroll integration
    ☐ Time reporting
    ☐ Real-time tracking
    ☐ Other: _____
18. Do you have mobile/off-site employees?
    ☐ Yes
    ☐ No
19. If yes, do you need GPS/geolocation for time tracking?
    ☐ Yes
    ☐ No
    ☐ N/A
20. What are your current time tracking challenges?
    ☐ Manual entry
    ☐ Entry errors/omissions

☐ Lack of real-time visibility
☐ Payroll integration
☐ Other: _____

## Tool Integration

21. Do you need to integrate time tracking with PM tool?
☐ Yes, with Project Online
☐ Yes, with Project for the Web
☐ No
22. If yes, what integration features are essential?
☐ Time entry linked to project tasks
☐ Timesheet approval in PM tool
☐ Time data transfer to project tasks
☐ Consolidated resource reports
☐ Other: _____
23. Do you need mobile time entry?
☐ Yes
☐ No
24. Would you use AI for automatic time capture?
☐ Yes
☐ No
☐ Maybe

## Access Control

25. Do you need role-based access control?
    ☐ Yes
    ☐ No
26. If yes, what roles do you need to account for?
    ☐ Project Manager
    ☐ Team Member
    ☐ Functional Lead
    ☐ External Stakeholders
    ☐ Other: _____
27. Do you have a project hierarchy for access control?
    ☐ Yes
    ☐ No
28. If yes, what are your requirements for access inheritance?
    ☐ Automatically inherit from parent
    ☐ Delegate/restrict per child project
    ☐ Other: _____

| Feature | Microsoft Planner | Project for the Web | Project Online (PWA) |
| --- | --- | --- | --- |
| Basic Task Management | ✓ | ✓ | ✓ |
| Project Templates | Basic | Premium | ✓ |
| Views (Grid, Board, Calendar, etc.) | ✓ | ✓ | ✓ |
| Teams Integration | ✓ | ✓ | ✓ |
| Task Dependencies | Limited | ✓ | ✓ |
| Resource Management | Basic | ✓ | ✓ |
| Resource Leveling | Limited | ✓ | ✓ |
| Advanced Reporting | Limited | ✓ | ✓ |

| Feature | Microsoft Planner | Project for the Web | Project Online (PWA) |
|---|---|---|---|
| Cost Management | Limited | ✓ | ✓ |
| Portfolio Management | No | Limited | ✓ |
| Demand Management | No | ✓ | ✓ |
| Customization/Integrations | Limited | ✓ (Power Platform) | ✓ |
| Timesheet Management | 3rd Party Integration | 3rd Party Integration | ✓ |
| Timesheet Approval | No | No | ✓ |
| Mobile Time Entry | 3rd Party Integration | 3rd Party Integration | ✓ |
| AI Capabilities (Copilot) | ✓ (Upcoming) | ✓ (Upcoming) | No |

| Feature | Microsoft Planner | Project for the Web | Project Online (PWA) |
|---|---|---|---|
| Role-based Access Control | Limited | ✓ | ✓ |
| Project Hierarchy Access | No | ✓ | ✓ |
| Power BI Integration | ✓ | ✓ | ✓ |

**Microsoft Planner:**
- Recommended for simple, straightforward projects
- Good for basic task management, team collaboration via Microsoft Teams integration
- Limited functionality for advanced project management needs like resource management, reporting, cost tracking
- Best suited if you only need the basic free/included features of Microsoft 365

**Project for the Web:**
- Recommended for projects of medium complexity
- Provides more robust planning capabilities like Gantt charts, dependencies, timesheets
- Good integration with Power Platform for some customization
- Allows collaboration with external parties via Microsoft Teams
- Lacks some advanced portfolio/resource management features
- Choose if you need more than basic task tracking but don't require the full capabilities of Project Online

**Project Online (PWA):**
- Recommended for complex, large-scale projects
- Provides advanced capabilities like portfolio management, resource leveling, earned value analysis
- Allows deep customization and integration with other systems
- Robust access control and security features
- Higher licensing cost than Project for the Web
- Choose if you have very complex projects with advanced reporting/analytics needs
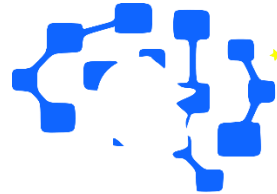
**Some examples of mapping based on the answers to the questionnaire:**

1.   If you select basic methodologies, a small team, simple reporting needs - Microsoft Planner

2.   If you select Agile/hybrid methodologies, projects of medium complexity, integration with Power BI - Project for the Web

3.   If you select traditional methodologies, very large/complex projects, need deep customization - Project Online

4.   If you need advanced resource management capabilities like skills-based allocation - Project Online

5.   If you need integration with the company's ERP/financial systems – Project Online will likely be required

*Improve the*
*technical and interpersonal*
*skills  of project teams*

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