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# PECS Power ProMIS

## What is Power ProMIS?

Power ProMIS is an **integrated Project and Portfolio Management (PPM)** application suite designed to help enterprises strategically manage their projects, programs, and operations. [It enables organizations to ideate, plan, execute, and close projects systematically, aligning them with strategic objectives for sustained growth and success<sup>1</sup>.](#)

## Overview:

Power ProMIS is an end-to-end Project & Portfolio Management product powered by Microsoft Power Platform. It acts as a centralized hub for accessing and collaborating on all the organizations Project Portfolio Management activities and data.

The ease-of-use scheduler with a modern interface in the form of Project for Web will bring in the benefit of building a project plan with a robust schedule embracing both Hybrid and Agile models.

## Why Choose Power ProMIS?

- **Strategic Alignment:** Ensures projects and programs align with your organization's strategic goals.
- **Centralized Control:** Centralizes data for informed decision-making and forecasting.
- **Resource Optimization:** Maximizes resource utilization across multiple projects.
- **Powerful Analytics:** Leverages Microsoft Power BI for insightful analytics and reporting.

## Key Benefits:

**Be global:** More than six global standards and 200 + man-years of experience available in ready to use Enterprise level business application mode with ready built reports and dashboards.

**Be Agile:** Shorten your implementation cycle by over 80% and operationalize the PMO within one fortnight.

**Rapid Adoption:** Quick learning and adoption: The entire application can be learnt in few days of hand-on workshop and go live.

**Comprehensive:** Ideation to Strategy within one portal, connecting all stakeholders to a common page reduces the communication efforts for the management and leadership roles by more than 20%

**Collaboration:** Increase the collaboration in a matrix organization structure, easy delegation of responsibilities, project centric workgroups.

**Manage uncertainties:** Robust Risk management at Project, Program and Portfolio level. Easy to scale up to enterprise level.

**Integration:** Seamless integration with other Microsoft applications that increases the productivity

**Improved knowledge management (KM):** practice by collection, storing and sharing of all project information towards continuous improvement.

**Overall,** an irresistible transformation that bring in unbeatable value for investment and a sweet reward for the employees and leaders

## Key Features:

- **Project Center:** Manage your projects from initiation to closure.
- **Resource Center:** Optimize allocation and utilization of resources.
- **Program Center:** Oversee multiple related projects to achieve program goals.
- **Portfolio Center:** Align multiple projects and programs with business strategy.
- **Lifecycle Models:** Supports multiple models including Ideation, Project, Program, and Portfolio.
- **Agile/Kanban Board:** For flexible project management.
- **Document Management:** With approval cycle and versioning.

## Additional Features:

- Application is built on Microsoft Power Platform and hence Data security, Availability, low Latency in data transfer.
- Consistency in user experience is guaranteed.
- Product components comply with PMI, PRINCE2, Scrum and SAFe standards and methodologies.
- Application can be tailored and customized based on organization's best practices.
- A complete digital PMO with governance models embedded.
- Solution Implementation – flawless in no time.
- Integration capability with other office 365 applications
- Use case-based training and recorded sessions for future use.
- Technical and functional support / handholding for the project team.
- Seamless capability to scale up.
- Enhancement of service regularly with new features & capabilities.
- Power ProMIS includes all Project, Program & Portfolio parameters.
- Schedule management - Deliver the project on time with a map for execution and delivery framework to tracking progress and managing change.
- Resource management - Deliver results with your resources today and plan to manage surplus and deficits across a planning horizon.
- Issue and risk management - Prevent, identify, and mitigate potential business or project-related risks and issues.
- Financial management - Adopt financial management processes and effectively track Project, Program & Portfolio budgeting.
- Time and task management - Utilize a centralized and common approach to time reporting and task management.
- Reporting & Business Intelligence- Collect, categorize, understand & visualize the Project, Program & Portfolio metrics & generates visually appealing dashboards.

## Solution Type:

- **Managed Solution:**

A managed solution is a package of components that can be exported and imported between environments, like an unmanaged solution. However, a managed solution locks down its components, preventing further customization or modification once deployed. This ensures greater control over the integrity and stability of the solution in production environments.

## Pre-Requisites:

- **User Permission:**

At the environment level, user permissions are typically granted to roles such as System Administrator and System Customizer. These roles entail various responsibilities and access levels within the environment, ensuring smooth operation and customization of the system.

- **Project For Web Licenses:**

For web licenses, there are three tiers available, Plan 1/ Planner Plan 1, Project Plan 3, Project Plan 5 licenses. Each licenses grants access to project for web. Minimum Plan 1 is required for the project for web access.

- **Premium connectors:**

Data Verse is classified as a premium connector, which means that accessing it requires a premium license, such as a **Power Apps per app license** (Minimum required) or other premium licensing options.

- **Power BI:**

To configure reports in Power BI, a Power BI Pro license is necessary. However, if the user possesses an Office 365 E5 license, then a Power BI Pro license is not required.

- For team members, an Office 365 account with either an E3 or E5 subscription is necessary, while senior management requires an E5 subscription.

# Quick Setup

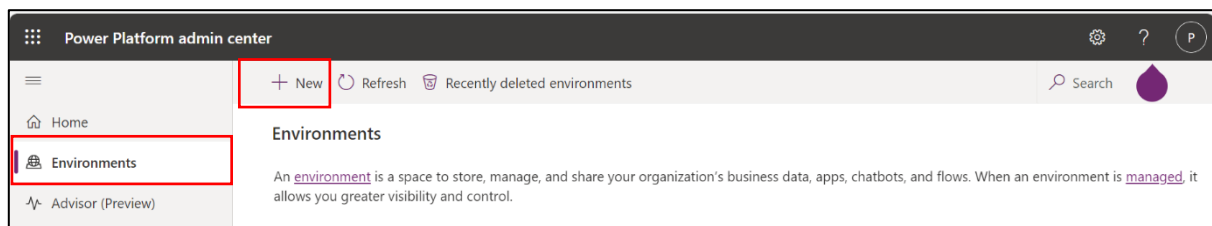
## Note: Before we proceed...

As **Power ProMIS App** is an Enterprise Product, we advise you to contact to your IT admin in setting up the environment.

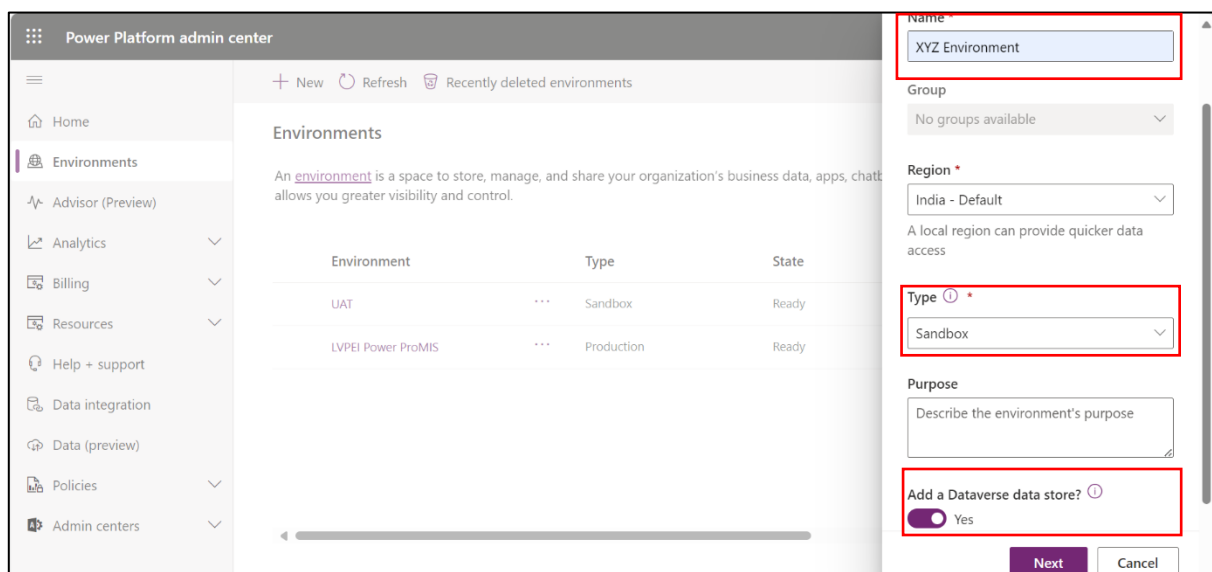
However, If you could contact us, Proventures IT Admin will help you set up the Environment within 24 hours.

## How to create New Environment:

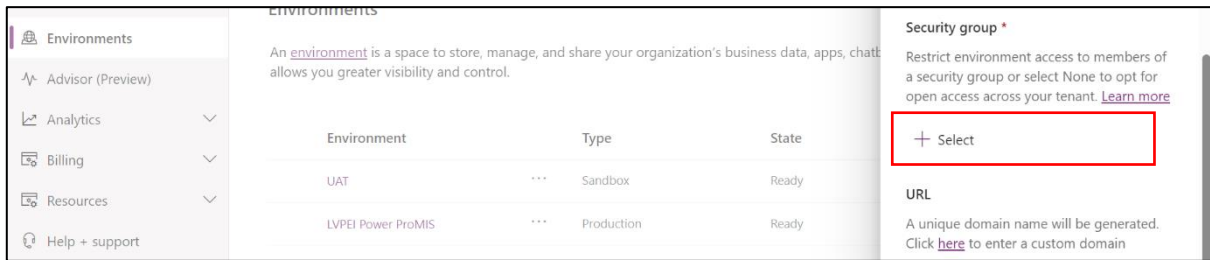
- Go to Power Platform admin center (URL: [Power Platform admin center \(microsoft.com\)](https://powerplatformadmincenter.microsoft.com))
- From left vertical menu, Select **Environment**
- Click on **New** button to create Environment for Power ProMIS



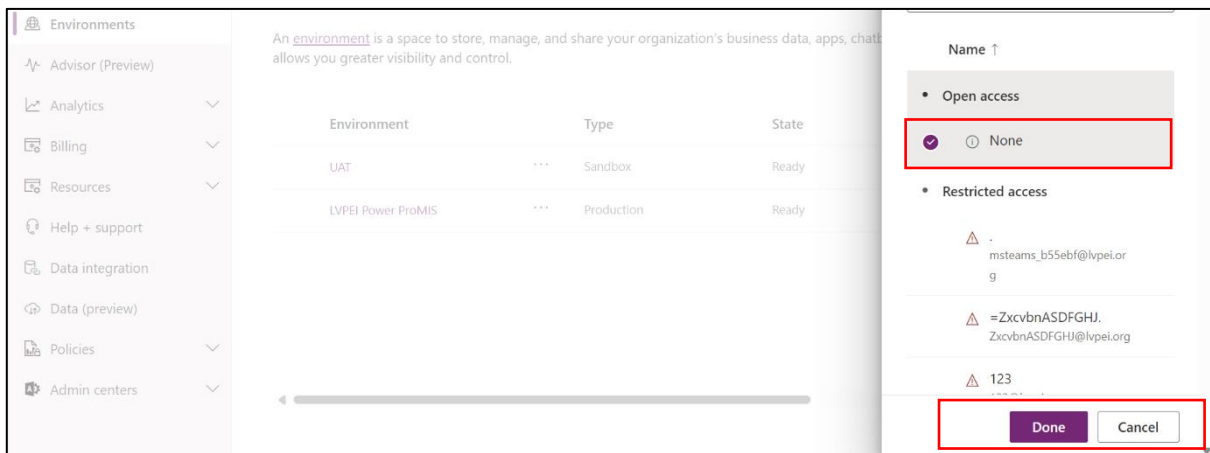
- In the right vertical pane, enter the **Name** of Environment.
- Choose **Type** as **Sandbox** and enable the **Add a Dataverse data store** and then click on the **Next** button as shown in the below screenshot.



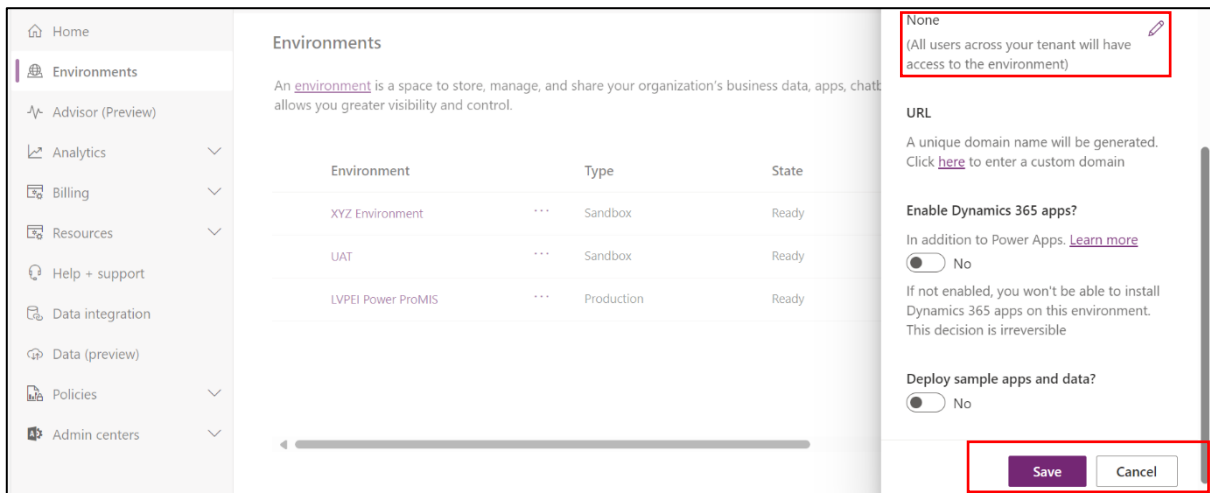
- From the Pop up, under **Security group**, click on **+Select**.



- In the following screen, select **None** and click on **Done** as indicated in the picture.

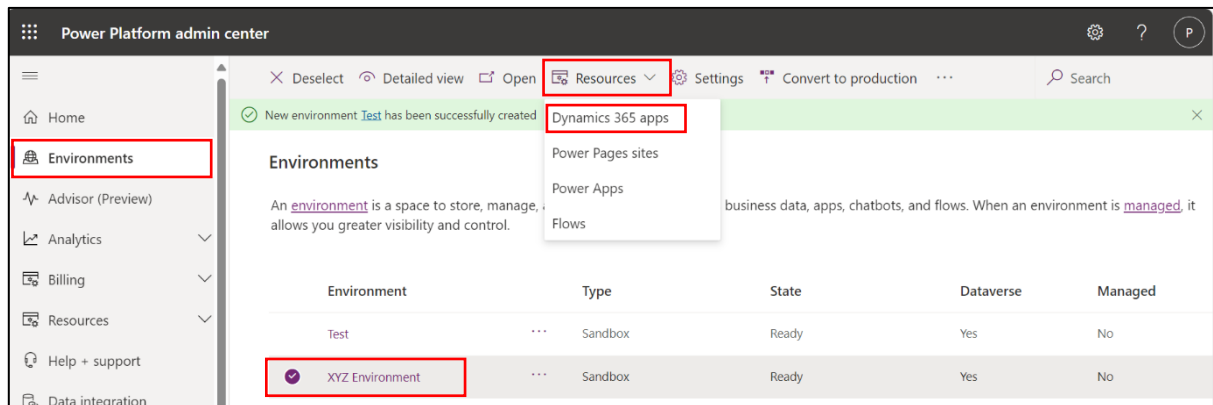


- Ensure **None is** selected and then click on **Save** as indicated in the below picture.

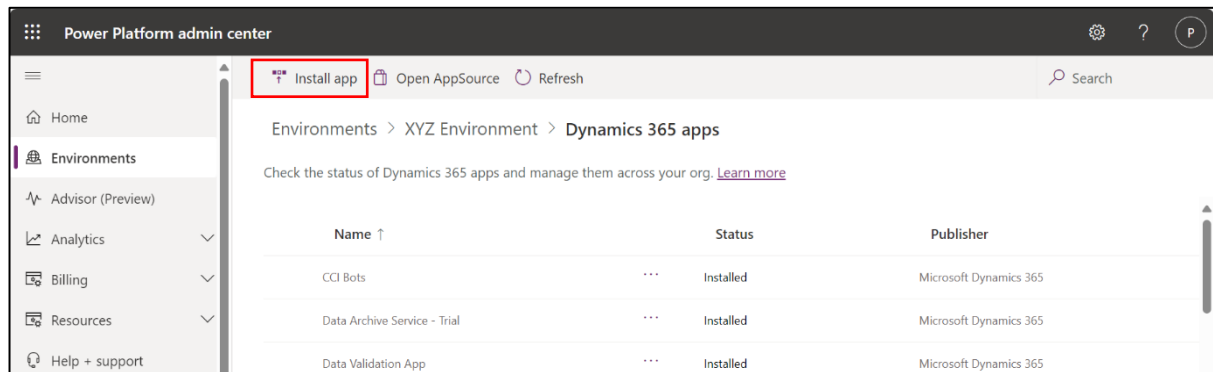


# Installation of Dynamics 365 Apps

- After creating the environment, you'll need to install some apps. To do this, follow the remaining steps.
- Click on **Environments**, ensure the desired environment is selected from the table.
- Once **Environment** is selected, from the top **Resources** drop-down, click on **Dynamics 365 apps**.

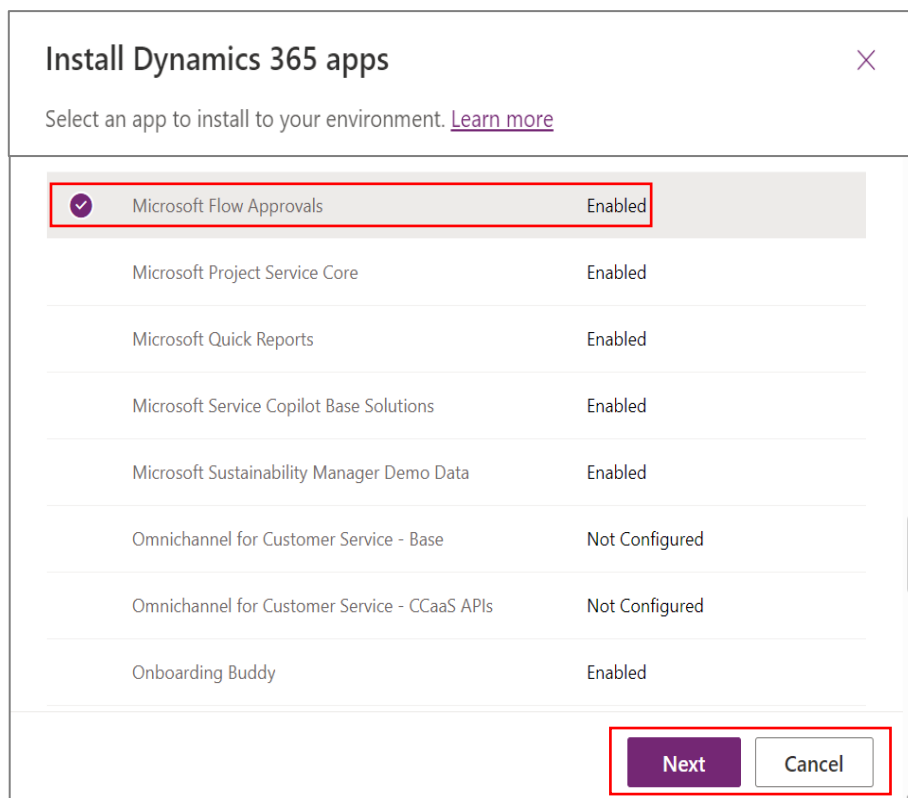


- Click on **Install app** as indicated in picture.

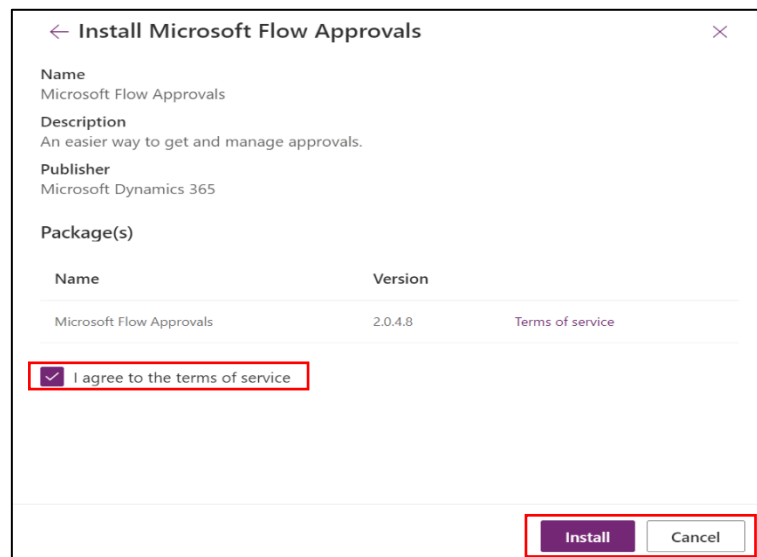




- After clicking on "**Install**," a pop-up will appear where you'll need to scroll to the following apps to install.
  - "**Microsoft Flow Approvals**",
  - "**Microsoft Project Service Core** and
  - "**Dynamics 365 Customer Voice**".
- We have to install the above mentioned apps one after the other.
- Check the radio button against the app and click **Next** as show in the below picture and follow the steps to install.

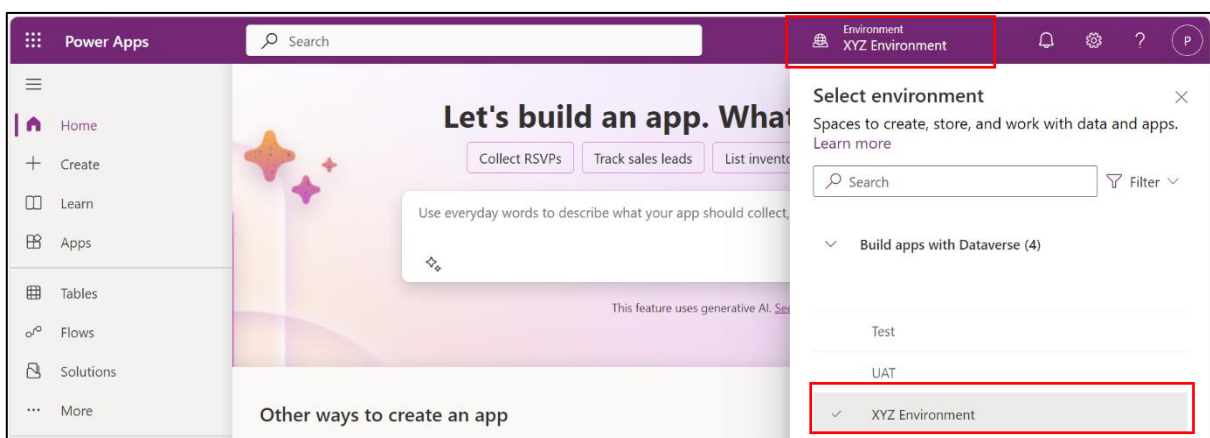


- In the next screen, check the box “I agree to the terms of service” and click on **Install** as shown below.



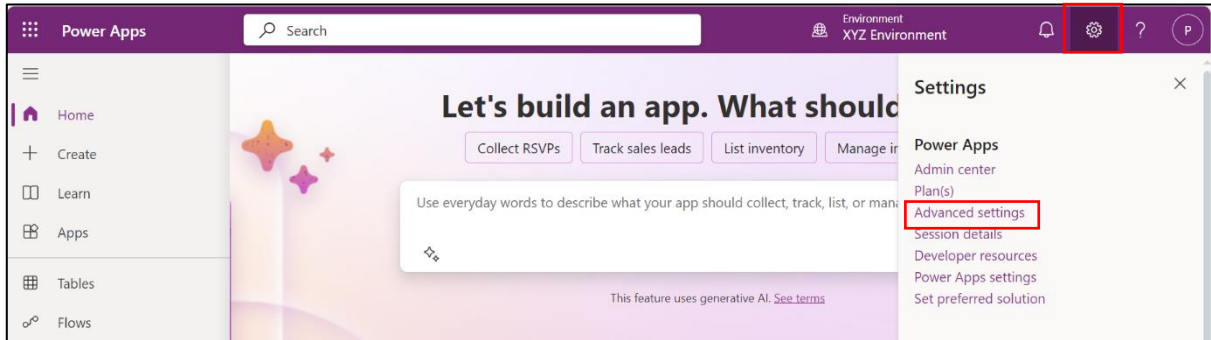
***Note:** We have to follow the above steps to install the three mentioned apps. The Apps installation takes about 20minutes to complete.*

- Use the below URL to go back to Power Apps Home page ( <https://make.powerapps.com/> )
- Click on the **Environment** from top right corner and select your environment from the list as shown in the picture.

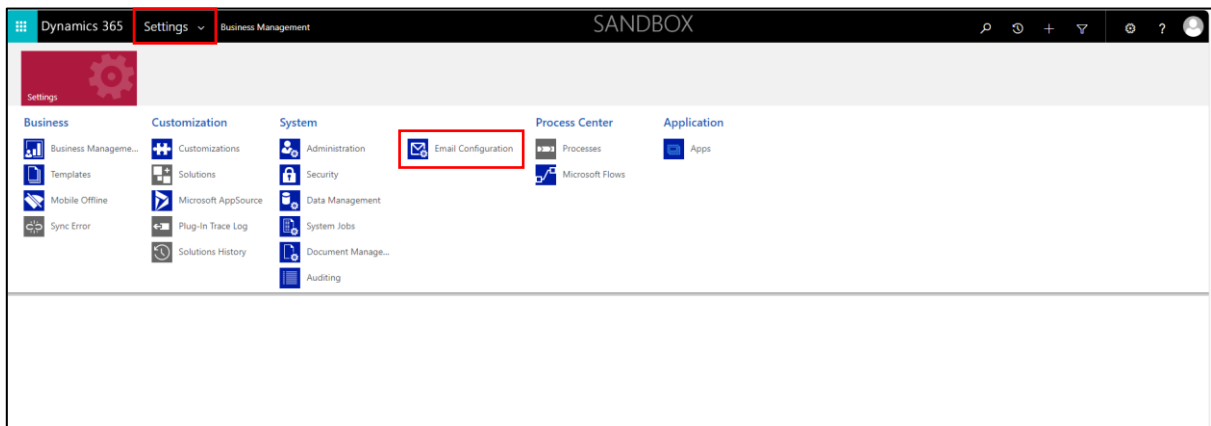


## Environment Settings:

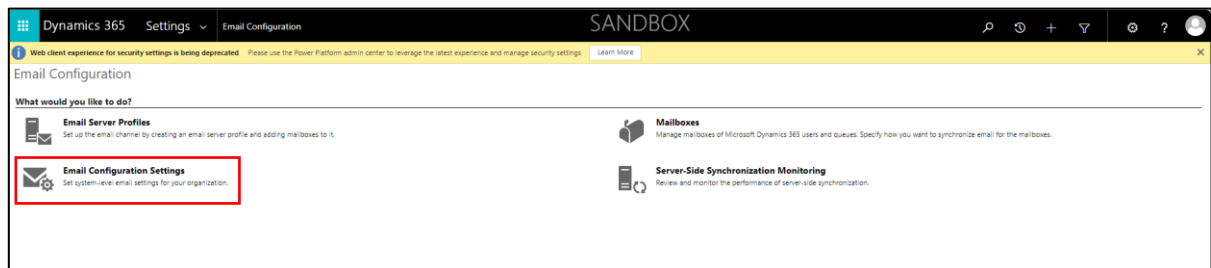
- Click on the **Settings** from top right corner and go to **Advanced settings**



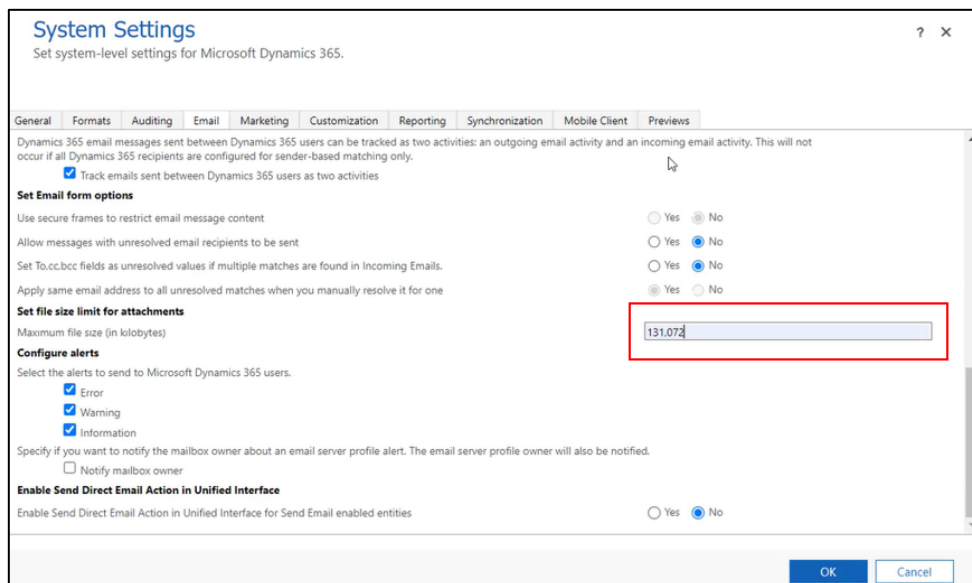
- Drop down the **Settings** from the ribbon and then click on **Email Configurations**



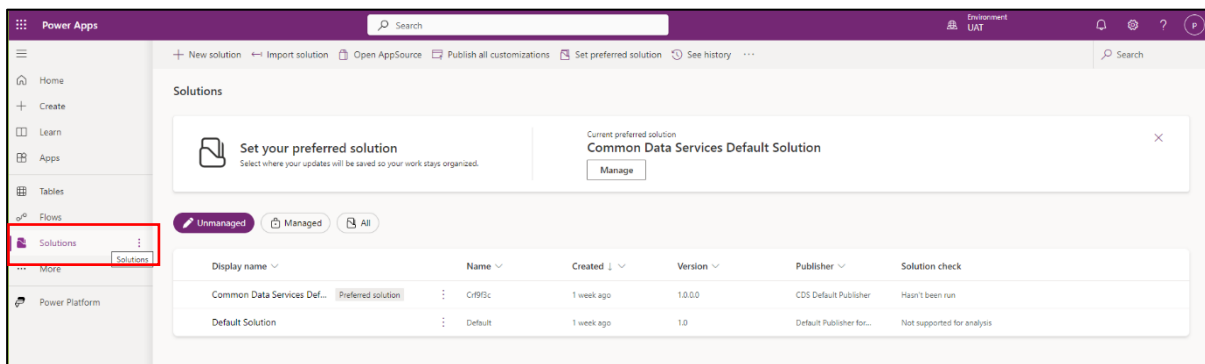
- Click on **Email Configuration Settings**



- Scroll down to the option: **Set the file size limit for attachments** section.
- Then set the Maximum file size to **131072**.

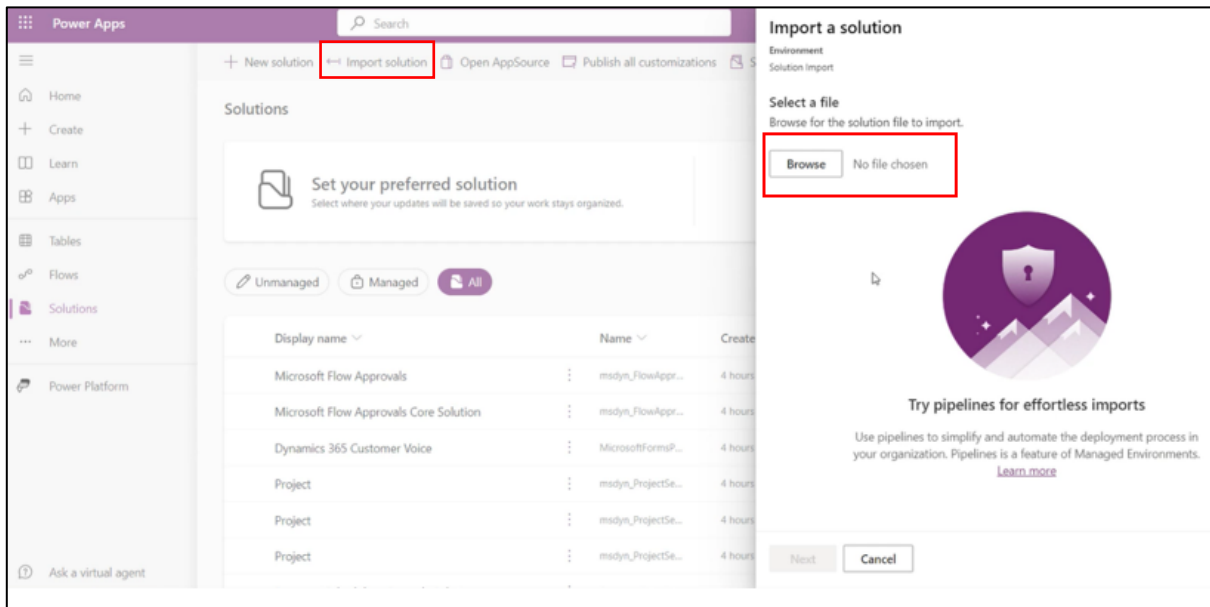


- Use the below URL to go back to Power Apps Home page ( <https://make.powerapps.com/> )
- Then click on **Solutions**.

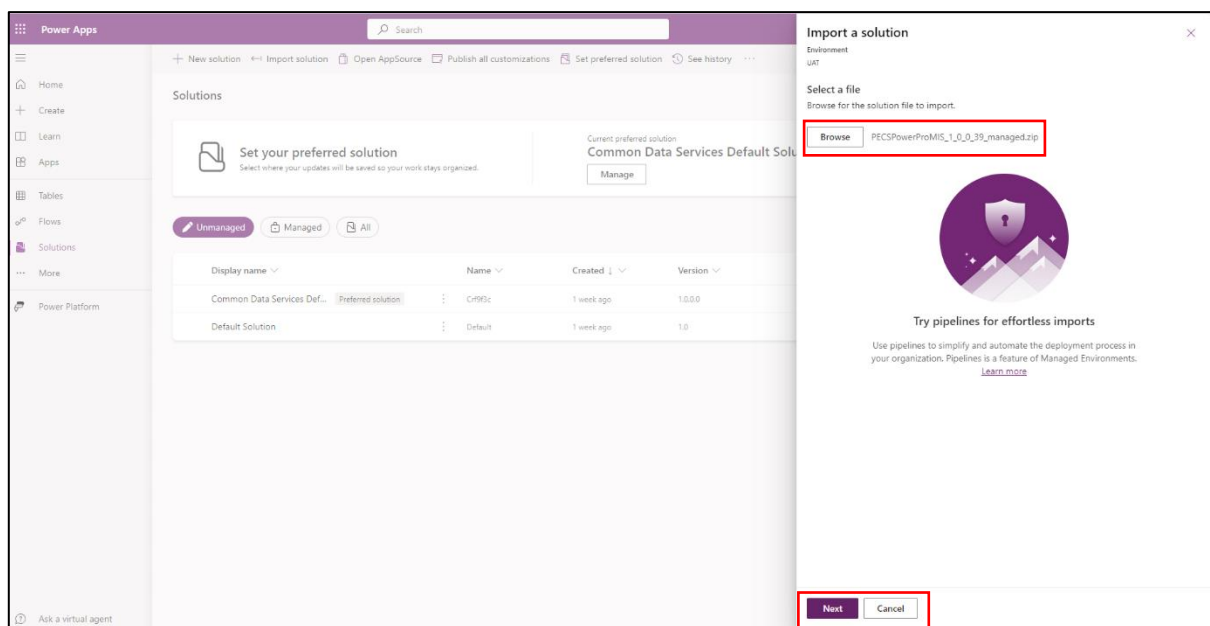


# Solution Import

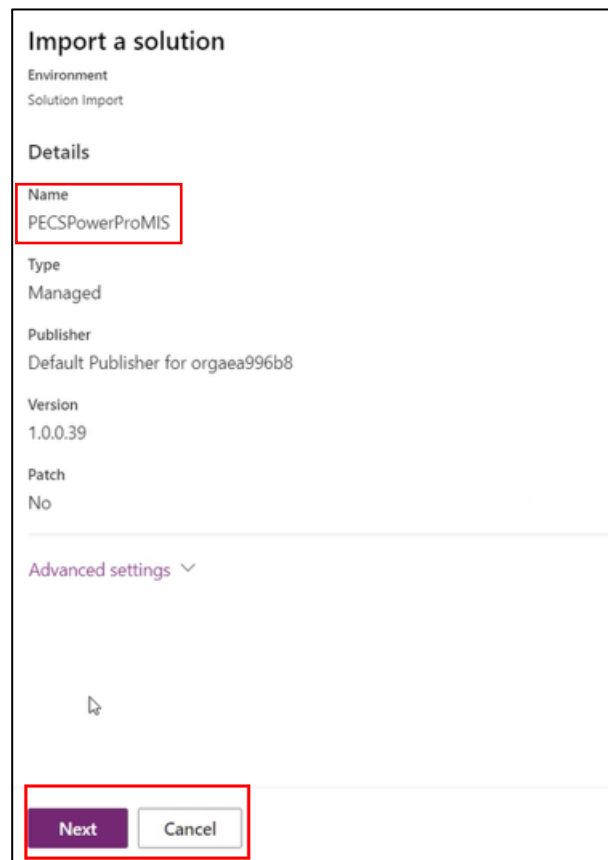
- Click on the **Import Solution** option and click Browse from the pop up.
- Click on **Browse** and select the Zip file from your PC and click on **Open**.



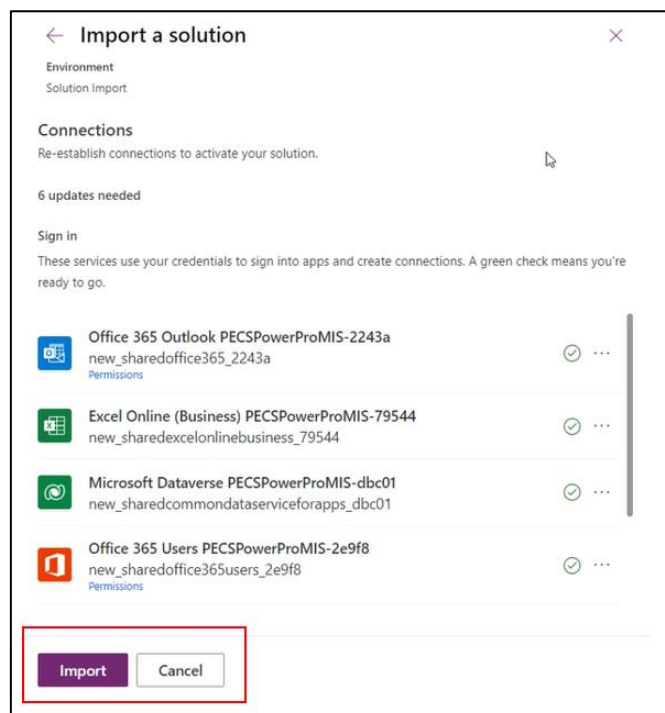
- Click on **Next** once the file is uploaded.



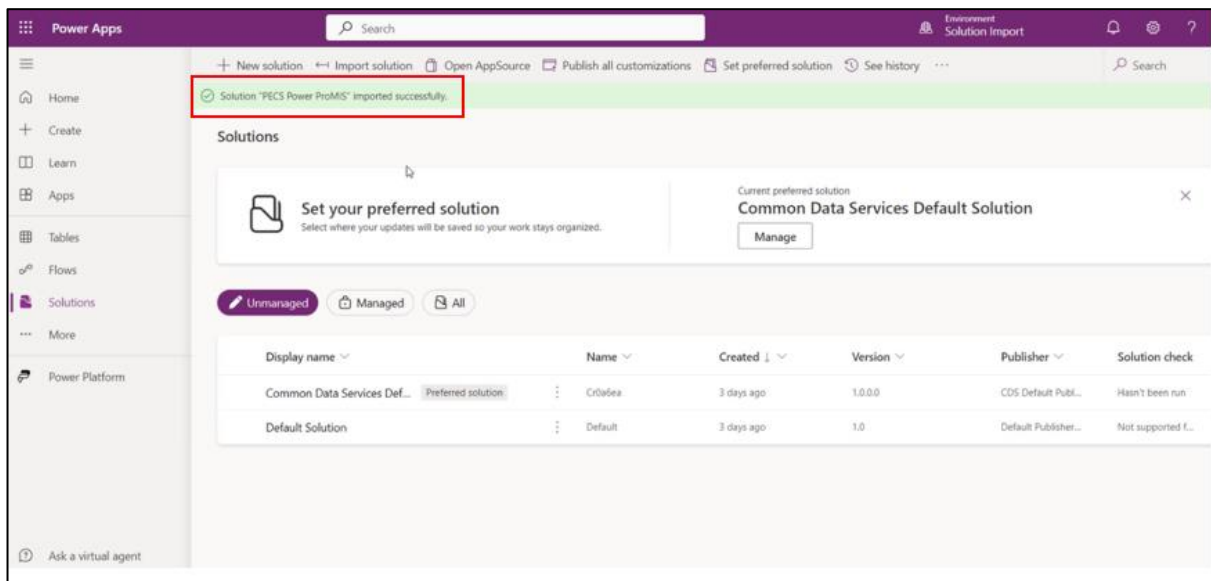
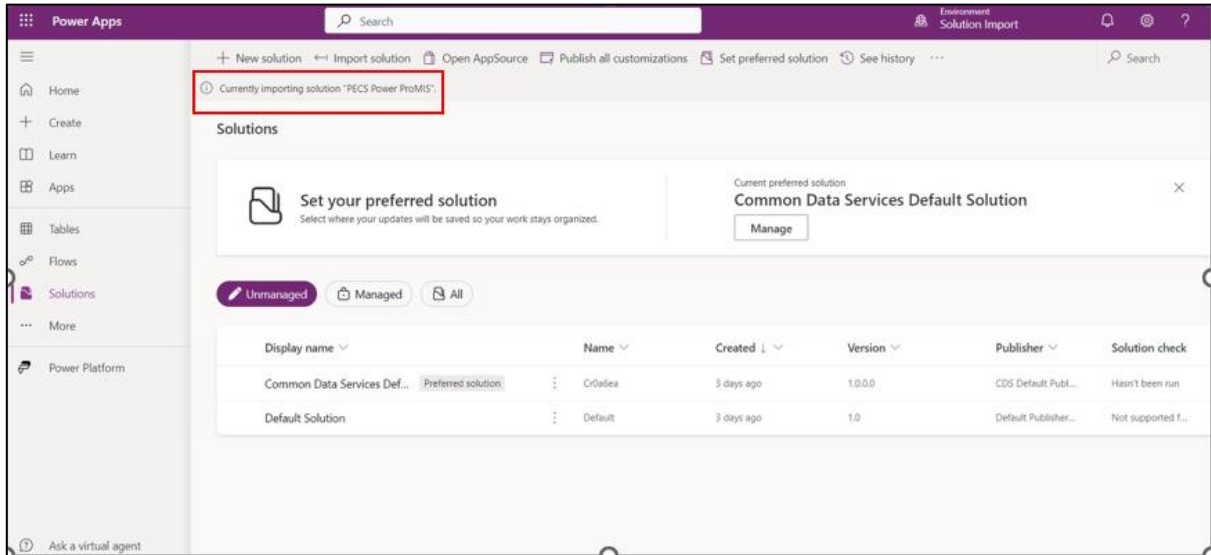
- We can get to see the **PECSPowerProMIS** and then click on **Next**.



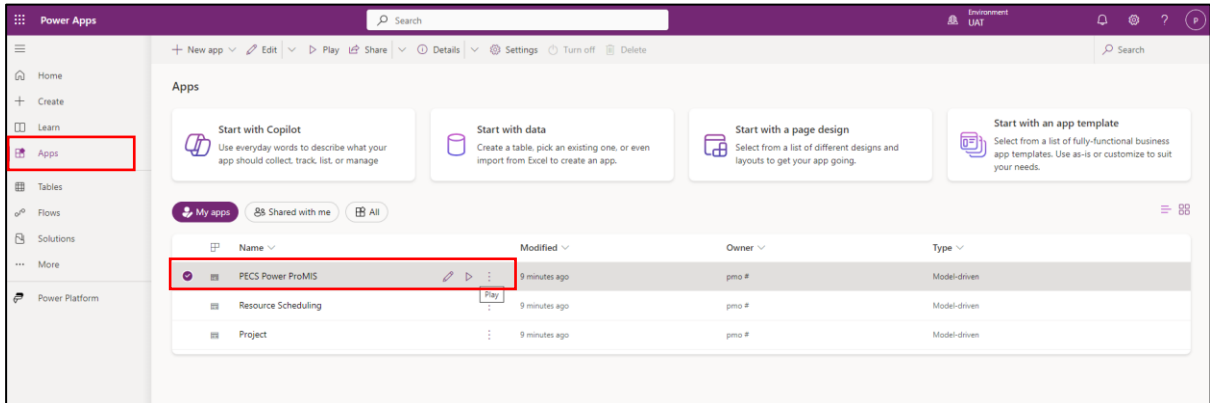
- All the connections will be established for your service account.
- Then click on Import.



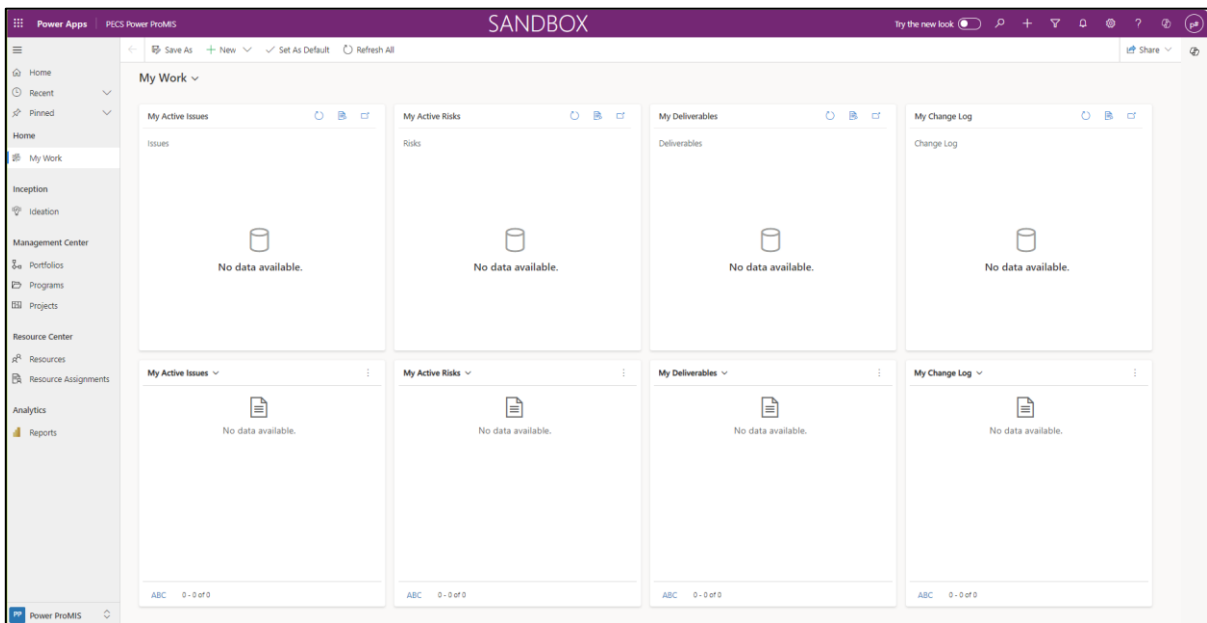
- The importing status will be notified as shown below.
- This will take about 5 minutes to complete.



- Upon successful completion, click on **Apps** and Play the Power ProMIS App.



- When you click on **Play**, the **Power ProMIS App** will run as shown below.



**Note:** Once the steps are completed, please contact us for the additional configurations