Project Online Migration & Platform Selection Guide

Microsoft has announced retirement of Project Online on September 30, 2026. Enterprise organizations should plan and execute a smooth migration well before that date—and select a modern platform that truly fits their needs. This guide is divided into two parts: Part 1 is a complete migration checklist. Part 2 is a platform-agnostic selection framework.

Part 1 — Project Online Migration Checklist (Enterprise Edition)

Use this phased checklist to protect data integrity, reduce downtime, and drive adoption.

Phase 1: Pre-Migration Planning & Preparation

- Environment Assessment: Identify what needs to move by reviewing:
  - Active projects
  - Closed projects to retain or migrate
  - Required metadata (fields, reports, resource plans/requests, timesheets)
  - Any custom tools, workflows, or processes that must be rebuilt (approvals, intake/request processes, stage gates, risks/issues, change management, etc.)
- Clean Up & Prioritize: Archive or close outdated items, remove unused fields, and confirm what data should be migrated vs. left behind.
- Define Your Target State: Decide what the future platform must support—portfolio visibility, resource management, financials, intake, reporting, integrations, etc.—so the migration aligns with business goals.
- Identify Gaps & Dependencies: Document customizations, integrations, and reporting dependencies that will need to be recreated or redesigned on the new platform.
- Plan the Migration Approach: Outline the pilot, migration waves, timeline, and who needs to be involved. Ensure requirements fit business cycles.
- Communication & Readiness: Notify impacted teams about upcoming changes, read-only periods, and training timelines. Confirm who will support decision-making.

Phase 2: Migration Execution (Pilot & Cutover)

- Pilot Migration & Testing: Migrate a representative subset in a test instance. Validate schedules, resources, custom fields, permissions, and reports.
- Finalize Runbook & Comms: Produce a step-by-step cutover plan with owners and go/no-go checkpoints. Notify users of read-only periods.
- Data Import: Migrate configurations → resources → projects; repoint integrations and update report data sources.
- Switch Over: Declare the new platform authoritative; provide login instructions and monitor access.

- Post-Cutover Smoke Test: Verify critical projects, workflows, timesheets/status updates, and dashboards.
- Invoke Rollback (if needed): Use predefined criteria to decide; otherwise proceed to stabilization.

Phase 3: Post-Migration Validation & Support

- Comprehensive Data Validation: Reconcile project counts and spot-check complex schedules and resource data.
- Process & Reporting Tests: Run end-to-end processes (intake, stage gates, timesheets) and confirm dashboards.
- User Training & Documentation: Deliver role-based training and quick-reference guides; update SOPs.
- Hypercare Support: Staff a dedicated channel for 1–4 weeks to resolve issues rapidly.
- User Feedback & Iteration: Gather feedback; implement quick wins; communicate successes.
- Decommission Project Online: Retain required archives, remove access, and finalize license changes.
- Project Close & Retrospective: Document lessons learned and hand off to steady-state support.

Common Pitfalls & Mitigation

Risk	Mitigation
Data Integrity & Loss	Perform thorough mapping and multiple test migrations; back up and validate side-by-side.
Downtime & Disruption	Time-box cutover, schedule low-usage windows, and define rollback checkpoints.
Integration & Reporting Breakage	Audit/repoint integrations and BI sources; test in pilot and immediately post-cutover.
User Adoption & Change Fatigue	Invest in change management, training, and visible executive sponsorship.

Part 2 — Platform-Agnostic Selection Guide

Use this framework to compare platforms objectively and pick the best-fit solution.

Key Evaluation Criteria

Criteria	What to Look For
Functional Capabilities	Scheduling, dependencies, resource planning, financials, portfolio selection, agile/hybrid support.
Scalability & Performance	Proven at your expected project/user scale; clear limits and performance benchmarks.
Integration	APIs and connectors for M365/Teams, DevOps/Jira/GitHub, ERP/HR, and BI tools (Power BI/Tableau).
User Experience & Adoption	Modern UI, low learning curve, mobile/web access, collaboration features.
Governance & Security	Role-based access, audit, compliance; SSO/Entra ID; data residency options.
Cost & Licensing	Licenses, implementation, infrastructure, training, add-ons; 3–5 year TCO.
Vendor Support & Roadmap	Support SLAs, customer success, release cadence, innovation trajectory.
Deployment Model	Cloud, on-prem, or hybrid fit with your compliance and IT strategy.

Decision Matrix Template

Criteria	Weight	Option A	Option B	Option C
Functional Capabilities				
Integration				
User Experience				
Cost / TCO				
Support & Roadmap				
Security & Compliance				
Totals				

Cloud vs. On-Premises Considerations

- Cloud (SaaS): Lower infrastructure burden, faster innovation, easier scale; consider data residency and integration with on-prem systems.
- On-Premises: Maximum control and customization; plan for hardware, patching, and slower feature velocity.
- Hybrid: Useful for specific compliance or connectivity needs; increases operational complexity.

Stakeholder Involvement & Change Management

- Cross-Functional Selection Team: Include PMO, IT, finance/procurement, and end-users for requirements and demos.
- Communications Plan: Announce evaluation → selection → implementation; set expectations and timelines.
- Training & Champions: Role-based enablement, power users, and quick-reference guides to accelerate adoption.
- Measure & Iterate: Track adoption and satisfaction; tune governance, reports, and automations post-go-live.

Conclusion

Treat migration and selection as parallel, structured initiatives. Meticulous preparation, realistic pilots, and active change management turn Project Online's retirement into an opportunity to modernize your PPM capability—with minimal risk and maximum business value.