

The background is a scenic photograph of a mountain trail. Two hikers, a woman in a grey shirt and orange backpack, and a man in a yellow shirt and red backpack, are walking away from the camera on a dirt path. The landscape is lush with green vegetation and tall grass. In the distance, a large mountain peak is partially obscured by white clouds. A semi-transparent geometric overlay of white and blue triangles and lines is positioned on the left side of the image.

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# Project Management | Best Practices

Your Guides: Joe Almeda, Christi Rice



# Introductions

- Take 5 Minutes
- Turn to a Person Near You
- Introduce Yourself



# Agenda

- Introduction
- Demo of Project Components
- Dashboards
- Wrap Up

# Part I: Project Management Introduction

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## Introduction

- Class Overview
- Value of Project Management
- A Few Thoughts Before We Start

# Part I Agenda

# Class Overview

- This session is designed for Project Managers, but anyone seeking to better understand the system can benefit
- Instructor will lead the class through a live session
- Screen shots of various views are provided for reference
- Questions/comments will be taken as we go
- Topics needing more discussion will be put in parking lot for end-of-session wrap-up

# Value Of CA PPM Project Management

- The one-stop-shop for information about all of the organization's initiatives
  - Foundational information, which rolls up to aggregate views giving the organization at-a-glance knowledge of their investments and activity
  - Single source of truth for a project effort and all of its moving parts
- Dashboards can be used to roll up all pertinent project data in one place

CA PPM doesn't make projects run more smoothly – it enables YOU to make projects run more smoothly (less cost, better quality) by providing timely information to everyone involved at each step of the process

# A Few Thoughts Before We Start

- CA PPM is not “one size fits all”
  - Properly assessing your organization’s needs and tailoring the solution to those needs is fundamental to the successful use of CA PPM
- Review the various project fields & views CA PPM provides
  - Determine where and how the fields are displayed. Often times, this can make or break your implementation
- Consistency is key!
  - Providing accurate data on a regular basis makes the life of a PM a little easier.
- Simple is best
  - Implement what is needed, not what is flashy
  - Increase the complexity later, if needed



# Part II: Demo of Project Components

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## Demo of Project Components

- Project Details
- Resource Allocations/Assignments (Team/Task Tabs)
- Scheduling
- Baselining
- Cost/Budget Planning
- Issues/Risks/Changes
- Status Reporting

## Part II Agenda

# Project Properties

## Value

- This is very often your users' landing page for your project, key datapoints like Description, Start, Finish & Phase should be here
- We often refer to this page as the “command center” of the project, from here you can gather any information this project contains

## Best Practices

- The general page on a project record should not include information that a viewer can't find value in immediately

# Project Properties

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Dashboard

Properties ▾

Team

Tasks

Financial Plans

Chargebacks

Hierarchy

Risks/Issues/Changes

Processes

Project: BYOD Management - Properties - Main - Project Summary

Open in Scheduler ▾

Project Summary

✖ Project Name

BYOD Management

✖ ✨ Project ID

PR1037

Project Type

Major Project ▾

Project Category

New Development ▾

Objective

Evaluate impact of BYOD on current enterprise tools. The outcome of the project will be to determine which enterprise tools will allow access via the devices and to determine the schedule.

✖ Status

Unapproved ▾

✖ Progress

Not Started ▾

Work Status

On Hold ▾

Status Reporting

Not Required ▾

Stage

Initiation

✖

✖ Start Date

11/1/2016

✖ Finish Date

5/4/2017

Stakeholders

Project Manager

Tanner, Paul

✖

Business Owner

Roberts, Beth

✖

Project Management Office

Olney, Pam

✖

Finance and Governance

Granger, Paula

✖

Organizational Breakdown Structures

Organizational

/All Groups/Mobile Initiatives

✖

Department OBS

/Corporate/IT/Business Operation

✖

Quintiles Location OBS

✖

Save

Save And Return

Return

✖ = Required

✨ = Unique



# Allocations

## Value

- Maintain awareness and communicate resource demand for the project
- Can use to forecast costs (if setup to do this)

## Best Practices

- Find the monthly rhythm that works for your organization (i.e. update and review allocations each month)
- Allocate from estimates using a detailed/dynamic schedule could result in significant variances if the schedule slips; not a good way to smooth resource allocations

# Resource Allocations: Team Tab

Properties

Team

Tasks

Financial Plans

Risks/Issues/Changes

Chargebacks


Processes

Hierarchy

Dashboard


Collaboration















Project: JH Project-Financial Mgmt Overview - Team - Staff

 Scenario: [--Select--]

Actions

Filter: System Default



			Resource/Role▲		Project Role	Staff OBS Unit	Booking Status	Open for Time	Start	Finish	Average Allocation %	Default Allocation %	Allocation	Allocation Cost	Actuals	ETC
			Hoaldrige, Jon		Project Manager		Hard		1/4/16	3/8/16	80.0%	80.0%	300.80	22,560.00 USD	40.00	180.00
			Levert, Ed		Architect		Hard		1/4/16	3/8/16	25.0%	25.0%	94.00	9,400.00 USD	0.00	80.00
Total													394.80	31,960.00 USD	40.00	260.00

Displaying 1 - 2 of 2

# Scheduling

## Value

- Whether you maintain high-level milestones or detailed plans, keeping your schedule information updated and accurate in CA PPM will provide you, your team, and stakeholders with clear metrics for scheduling progress.

## Best Practices

- Keep this updated weekly
- Tasks should not have more than 80 hours
- Find the scheduling tool that works best for you and stick with it.

Project: RG PNC Testing mix for percent complete duration | Task: Task that should be 50% complete

General

Name: Task that should be 50% complete

ID: task\_50

Start: 3/28/2016

Finish: 4/5/2016

Milestone: ☐

Key Task: ☐

Status: Started

% Complete: 50.00%

Guidelines:

Charge Code:

Must Start On:

Must Finish On:

Start No Earlier Than:

Start No Later Than:

Finish No Earlier Than:

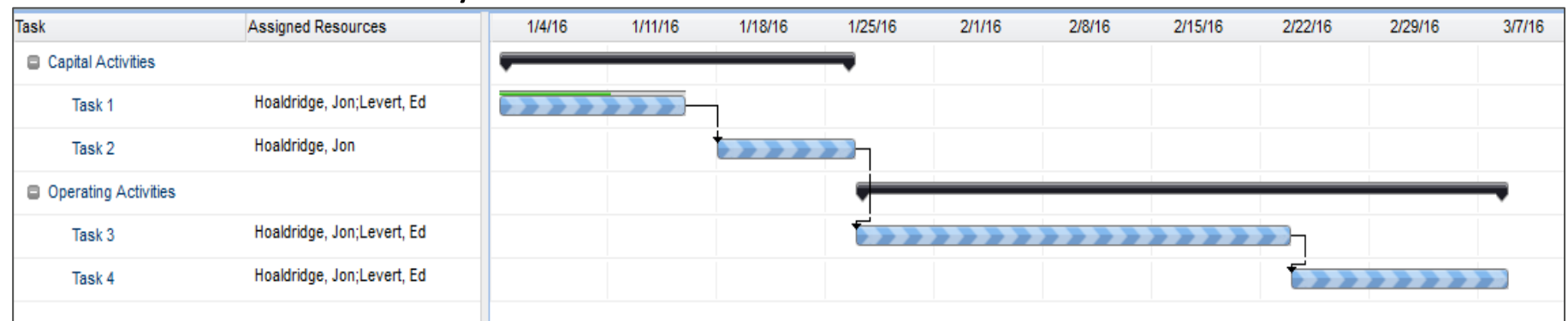
Finish No Later Than:

Exclude from Autoscheduling: ☐

Cost Type:

Save Save And Return Return

☒ = Required ☒ = Unique ☒ = Locked by Process



# Resource Assignments: Gantt View

**Project: JH Project-Financial Mgmt Overview - Gantt**

Filter: System Default ▼

Task	Assigned Resources	Start	Finish	Duration	Status	% Complete	Actuals	ETC	EAC	Actual Co...	ETC Cost	EAC Cost
Capital Activities		1/4/16	1/26/16	17	Not Started	0%	40.00	60.00	100.00	3,000.00	5,000.00	8,000.00
Task 1	Hoaldrige, Jon;Levert, Ed	1/4/16	1/15/16	10	Started	60%	40.00	20.00	60.00	3,000.00	2,000.00	5,000.00
Task 2	Hoaldrige, Jon	1/18/16	1/26/16	7	Not Started	0%	0.00	40.00	40.00	0.00	3,000.00	3,000.00
Operating Activities		1/27/16	3/8/16	30	Not Started	0%	0.00	200.00	200.00	0.00	16,500.00	16,500.00
Task 3	Hoaldrige, Jon;Levert, Ed	1/27/16	2/23/16	20	Not Started	0%	0.00	120.00	120.00	0.00	10,000.00	10,000.00
Task 4	Hoaldrige, Jon;Levert, Ed	2/24/16	3/8/16	10	Not Started	0%	0.00	80.00	80.00	0.00	6,500.00	6,500.00

**Assignments**

	Resource ▲	Role	Loading Pattern	Start	Finish	Actuals	Actual Cost (ACWP)	ETC	ETC Cost	EAC
<input type="checkbox"/>	Hoaldrige, Jon		Contour	1/4/16	1/8/16	40.00	3,000.00 USD	0.00	0.00 USD	40.00
<input type="checkbox"/>	Levert, Ed	Architect	Contour	1/4/16	1/15/16	0.00		20.00	2,000.00 USD	20.00



# Baselining

## Value

- Without baselining, it's difficult to understand project health. Even a simple process to take baselines throughout the project can yield useful project health information such as schedule health and cost health.
- The schedule baseline coupled with a budget plan and updated forecasts, provides a comprehensive view of project health.
- This is a foundational step to moving towards EVM
- Baselines are needed to populate most of the variance metrics

## Best Practices

- You can have multiple baselines
- You can update the baseline for one or more selected tasks
- Combining the baseline with the As Of date, % complete method will provide more sophisticated EVM
- Don't take a baseline in MSP, it will be ignored by CA PPM

# Baselining

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Dashboard Properties Team Tasks Financial Plans Chargebacks Hierarchy Risks/Issues/Changes Processes

Project: BYOD Management - Properties - Baseline

Open in Scheduler Actions

+ Filter: None

Revision Name	Revision ID	Current Revision	Baseline Start	Baseline Finish	BAC	BAC Cost
Baseline	BL1001	✓	11/1/16	5/4/17	2,196.00	343,020.00

Displaying 1 - 1 of 1

Save New Delete

= Highlighted rows = Current Revision = Currency = USD

Investment: BYOD Management - Baseline Revision Properties

Revision Name	Baseline	Baseline Start	11/1/2016
Revision ID	BL1001	Baseline Finish	5/4/2017
Description	Baseline	Current Revision	✓

**Baseline Effort and Cost**

BAC	2,196
BAC Cost	343,020.00

**Performance Against Current Baseline**

Planned Value (BCWS)	0.00	Cost Variance (CV)	0.00
Earned Value (BCWP)	0.00	Schedule Variance (SV)	0.00
Actual Cost (ACWP)	0.00	Cost Performance Index (CPI)	
		Schedule Performance Index (SPI)	

Save Save And Return Return

# Cost/Budget Planning

## Value

- Best place to get project-level financial information
- If you're pulling in actuals, you have an even better perspective of financials

## Best Practices

- Perform periodic reforecasts of the plan (i.e. monthly)
- Update the budget if an approved change request impacts costs
- Be consistent on the types of costs you plan to forecast (i.e. labor/non labor)

# Cost Budget Plans

<input type="checkbox"/>	Cost Type ▲	Transaction Class	Total Cost	Actual Cost	Cost Variance	% Total		Planned & Actual Costs		
								2016-01	2016-02	2016-03
<input type="checkbox"/>	Capital	External Labor	2,000.00 USD		2,000.00 USD	8.16%	Cost Actual Cost	2,000.00 USD	0.00 USD	0.00 USD
<input type="checkbox"/>	Capital	Internal Labor	6,000.00 USD	3,000.00 USD	3,000.00 USD	24.49%	Cost Actual Cost	6,000.00 USD 3,000.00 USD	0.00 USD 0.00 USD	0.00 USD 0.00 USD
<input type="checkbox"/>	Operating	External Labor	6,000.00 USD		6,000.00 USD	24.49%	Cost Actual Cost	750.00 USD	4,200.00 USD	1,050.00 USD
<input type="checkbox"/>	Operating	Internal Labor	10,500.00 USD		10,500.00 USD	42.86%	Cost Actual Cost	1,800.00 USD	6,480.00 USD	2,220.00 USD
Total Planned Cost			24,500.00 USD					10,550.00 USD	10,680.00 USD	3,270.00 USD
Total Actual Cost				3,000.00 USD				3,000.00 USD	0.00 USD	0.00 USD
Variance					21,500.00 USD			7,550.00 USD	10,680.00 USD	3,270.00 USD



# Project Budget Page

**Project: JH Project-Financial Mgmt Overview - Properties - Main - Budget**

Budget equals Planned Values ☐

**Financial Metrics Options**

Use System Rate for Total Cost of Capital ☒

System Rate 5.00%

Investment Rate

Initial Investment

**Planned**

Planned Cost	24,500.00
Planned Capital Cost	8,000.00
Planned Capital %	32.65%
Planned Operating Cost	16,500.00
Planned Operating %	67.35%
Planned Cost Start	1/1/2016
Planned Cost Finish	3/31/2016

# Status Reporting

## Value

- The OOTB status report contains analysis of the triple constraint and is an efficient method to communicate status to stakeholders

## Best Practices

- The attributes of the status report can be fed into other portlets and reports throughout the tool
- Portfolio health can be derived from project status report information (RegoXChange)
- Make the overall project status indicator quantitative vs subjective

# Status Reporting

## Portfolio Health Aggregate (RegoXChange)

- Process Workflow populates the three Portfolio Health Factors (on Metrics page) by aggregating the portfolio investment factors from the most recent Final project Status Report instances. This causes the Portfolio Overall Health to be calculated.
- The factors are then locked.

Job Type: Execute a Process - Job Properties

General

Job Name Execute a Process

Parameters

Allow only one running instance ☒

Process ID Portfolio Health Aggregate

Save Parameters

# Issues/Risks

## Value

- CA PPM provides a central location to manage issues/risks for the project team.
- It can also convert risks to issues or change requests without having to retype information.


## Best Practices

- Document risks properly: CAUSE-EFFECT-IMPACT
  - If Cause, then Effect may occur, leading to Impact
- Scrutinize the priority: Not everything is high priority
- Adjust the risk threshold (talk to your PMO if needed)
- Use the “Convert” functionality
- Use the Risks, Issues and Changes dashboard
- A quick and dirty solution for tracking “Decisions”
  - Use an Issue to collect and document decisions – the decisions can be the notes















# Project Risk Properties

**Project: JH Project-Financial Mgmt Overview - Properties - Main - Risk**

Risk 

**Contributing Factors: Rate Their Risk**

Objectives	Low  	( Low = requirements, objectives, scope, benefits are reasonable, clearly defined, measurable, and verifiable; High = not reasonable, clearly defined, measurable or verifiable )
Sponsorship	Low  	( Low = sponsorship is clearly identified and committed; High = not identified or committed )
Funding	Medium  	( Low = available without constraints; High = not yet allocated )
Resource Availability	High  	( Low = resources are available and external resources are not needed; High = uncertain, requires external resources )
Interdependencies	Low  	( Low = not dependent on other projects; High = dependencies exist )
Technical	Medium  	( Low = technology is proven, no new internal or external expertise is needed; High = technology unproved, requires external expertise )
Human Interface	Low  	( Low = well-defined UI; High = poorly-defined )

# Project Issues

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Properties

Team

Tasks

Financial Plans

Risks/Issues/Changes

Chargebacks

Processes

Hierarchy

Dashboard

Collaboration

Project: JH Project-Financial Mgmt Overview - Risks/Issues/Changes - Risks

Filter: System Default

<div></div>	Name	ID	Category Type	Status	Calculated Risk	Probability	Impact	Above Threshold	Creator	Owner
<div></div>	Risk 1	RS1082	Resource Availability	Open					Hoaldrige, Jon	Hoaldrige, Jon
<div></div>	Risk 2	RS1083	Resource Availability	Closed					Hoaldrige, Jon	Hoaldrige, Jon

Properties	Team	Tasks	Financial Plans	Risks/Issues/Changes ▾	Chargebacks	Processes	Hierarchy	Dashboard	Collaboration
Project: JH Project-Financial Mgmt Overview - <i>Risks/Issues/Changes - Issues</i>									
Filter: System Default ▾									
<input type="checkbox"/>	Name ▲	ID	Category Type	Status	Priority	Creator	Owner	Created Date	Originating Issue/Risk
<input type="checkbox"/>	Risk 1 to Issue 1	IS1091	Resource Availability	Work in Progress	❖	Hoaldrige, Jon	Hoaldrige, Jon	2/11/16	RS1082
Displaying 1 - 1 of 1									

## Converting a Risk to Issue or Change Request

The screenshot displays a web application interface for managing risks. At the top, there are navigation tabs: Home, Administration, and Favorites. Below these are sub-tabs: Properties, Notes, Associated Action Items, Associated Tasks, and Processes. The main content area is titled "Project: RG Prioritized Project | Risk: Risk 1 - Main". It contains several input fields: "Risk Name" with the value "Risk 1", "Risk ID" with the value "RI000170", "Status" with a dropdown menu set to "Open", "Owner" with the value "Greca, Rob", and "Target Resolution Date" with the value "4/12/2016". A "Category" dropdown menu is set to "[--Select--]". Below the main form is an "Audit Information" section. At the bottom, there are five buttons: "Create Issue", "Create Change Request", "Save", "Save And Return", and "Return". The "Create Issue" and "Create Change Request" buttons are highlighted with a red rectangular box.

# Changes

## Value

- Tracking changes to the project are a great way to keep stakeholders informed of the status of requested changes to the project.

## Best Practices

- Even if a workflow is not used, documenting the changes to the project scope, schedule, and resources is still a fundamental PM control objective
- Make sure to coordinate the updated forecast/Team/baseline based on the relevant approved change request

# Project Change Request

Properties Notes Processes

Project: JH Project-Financial Mgmt Overview | Change Request: Change Request 1 - Main

**General**

Change Request Name: Change Request 1

Change Request ID: CH1013

Description:

Category: Objectives

Priority: Medium

Status: Work in Progress

Owner: Hoaldrige, Jon

Reasons:

Next Review Date:

**Details**

Document:  No file selected.

Impact on Baseline: Will extend 2 weeks

Impact on Other Projects: none

Change in Cost: 4,000.00 ( System Currency )

Change in Schedule: 10 ( Days )

Change in Resources: 0

Expected Close Date: 2/19/2016

Benefits:

Close Date:

Last Updated Date: 2/12/2016

Last Updated By: Hoaldrige, Jon

Created Date: 2/12/2016

Created By: Hoaldrige, Jon

**Assessment**

Assessor:

Date Assessed:

Approved By:

Date Approved:

☒ = Required ☒ = Enter Once ☒ = Unique

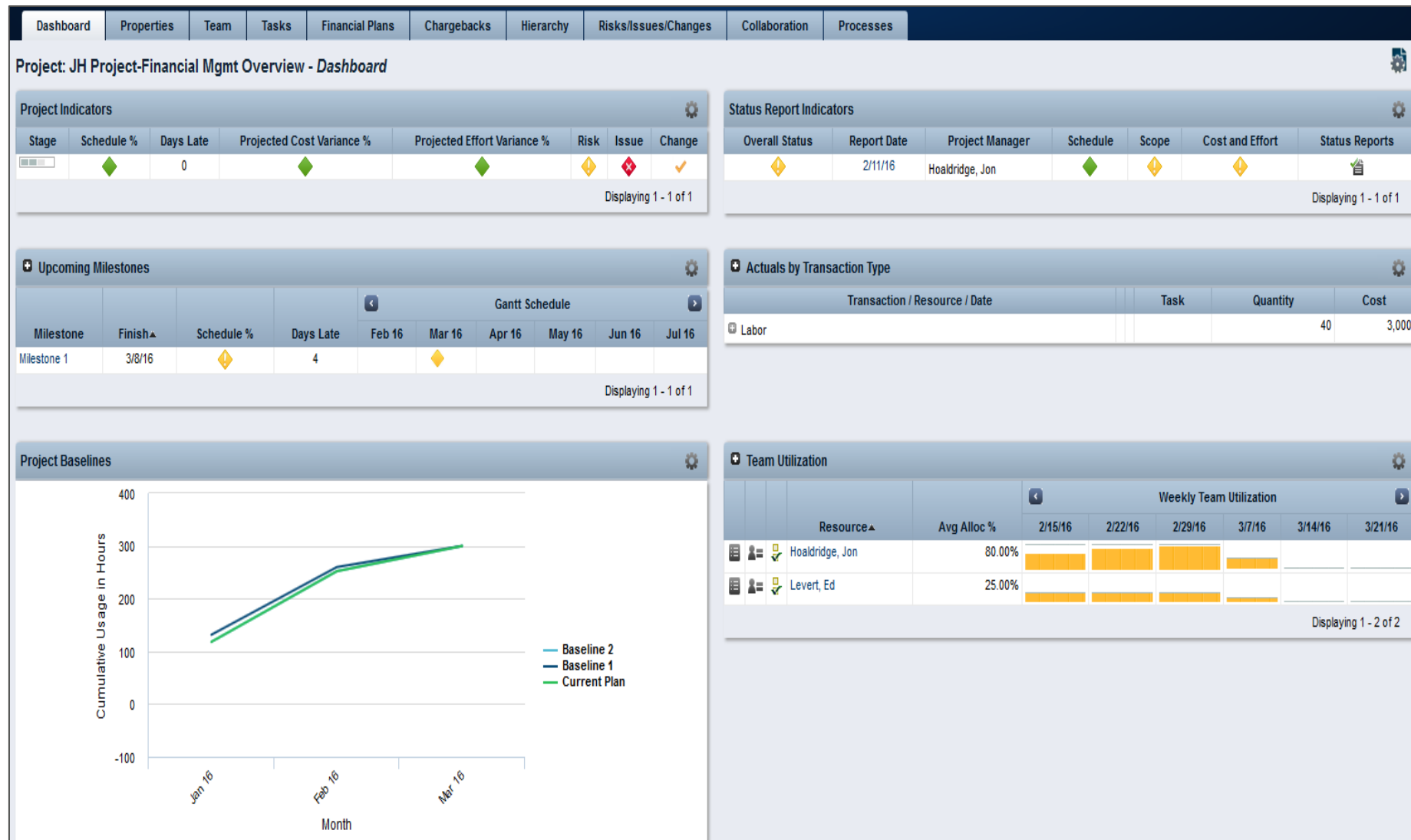
Project Dashboards

# Part III Agenda



# Project Dashboard

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# Enterprise Dashboard

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General

Sponsor

Program Dashboard

PM Alerts

Project Dashboard

Risks, Issues and Changes

Overview: Risks, Issues and Changes

OBSProject Manager

Filter

More

Issue Management

	Project	Issue	Description	Priority	Schedule	Target Resolution Date	Category
	Test-MK	Requirements to be freeze on time				10/13/15	Interdependencies
	Anesthesia Delivery	Test Issue Objectives from Risk				10/23/15	Objectives
	JH Project-Financial Mgmt Overview	Risk 1 to Issue 1	Critical resources may not be available in timely manner.			2/11/16	Resource Availability

## Wrap Up

- Challenges
- Rego Keys to Success
- Questions

# Part III Agenda

# Common Challenges

- Data in is not useful unless you can get that data out
- A detailed reporting strategy & roadmap should be a key output to any first phase CA PPM implementation
- It often is not and results in a glut of data with no strategy to mine it
- Failing to spend adequate time to understand what CA PPM is and how it works before it is implemented
- “Fixing” CA PPM after a short implementation window
- This is sometimes valid, but often is a symptom of a larger issue
- Insufficient or non-existent Organizational Change Management
- Lack of governance and policy to support adoption
- Lack of clearly defined expectations/requirements from CA PPM

# Keys to Success

- CA PPM Project Management should support your organization's business processes
  - Altering business processes to conform to a solution is sometimes inevitable, but whenever possible, it should be the other way around
  - Configure CA PPM to support your business and not the other way around
- Organizational change management is important
  - Training, communications and an open door policy is a very valuable strategy
  - It can make or break a CA PPM implementation
- Roll out the modules that your organization can consume
  - As you gain support, adding more functions in CA PPM can increase adoption
- Only put in what you need to report out – placing everything and the kitchen sink results in two failure points
  - Rejection of a “complicated” solution
  - A glut of unusable data



# Questions?



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## Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certification**
- Click on **Maintain My Certification**
- Scroll down to **Report PDU's**
- Click on Course Training (or other appropriate category)
- Enter **Rego Consulting**
- Enter Activity- **Enter Name of Course**
- Enter **Description**
- Enter **Date Started**
- Enter **Date Completed**
- Provide Contact Person **Name of Person to Contact**
- Provide Contact E-Mail **E-Mail of Person to Contact**
- Enter Number of **PDU's Claimed** (1 PDU per course hour)
- Click on the **I agree this claim is accurate box**
- Click **Submit** button



Let us know how we can improve!  
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