### regoUniversity 2018

### Program Management Best Practices

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### Introductions

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





### Agenda

- What is a Program? Using PMBOK definitions.
- How do Programs compare with Master Projects and with Projects?
- What are the Best Practices in the use of Programs within CA PPM?
- How does CA PPM work with MS Project and Open Workbench when using Programs?

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• What does CA PPM lack when working with Programs?

## Familiar Story In Your Organization

- Is everything a project?
- How do you understand the relationships between projects?

- What tools do you use for project management?
  - CA PPM
  - MS Project
  - Open Workbench
  - Others

### What Is A Program – In PMBOK?

Туре	Description
Project	A temporary endeavor undertaken to create a unique product, service, or result.
Program	A group of related projects and program activities managed in a coordinated way to obtain benefits not available from managing them individually.
Portfolio	Projects, programs, and operations managed as a group to achieve strategic objectives.



### What Is A Program – In The Real World?

- Key words = "related" and "coordinated"
- Example
  - An aerospace company that makes different kinds of aircraft
  - The design of one particular *type* of aircraft would be handled as a *program*
  - The design of parts of that aircraft, such as the engine, hydraulic system, electrical system, fuselage, etc., would each be a separate *project*
  - These projects are all related because they are all parts of the same aircraft, and they should be coordinated for that very reason

# Programs/Master Projects/Projects

Category	Project	Master Project with Sub Projects	Program
Description	The most common work plan. A Sub-	A Project with Sub-Projects. This allows for	A grouping of Projects and Master Projects.
	Project is a Project within a Master	multiple projects to be independently	Programs can contain other Programs
	Project.	managed and then rolled up into the Master.	
Conversion	Can become a Sub-Project of a Master	A Master Project can become a Sub-Project	Created specifically as a Program. A Project
	Project or a Master Project by adding	in another Master Project.	or Master Project cannot be converted to a
	Sub-Projects.		Program unless it meets certain criteria
<b>Microsoft Project</b>	Can be opened in Read/Write mode.	Can be opened in Read/Write mode.	Can only be opened in Read-Only mode.
Staff	Can have its own Staff.	Can have its own Staff and it will include the	Cannot have its own staff. It only has the
		staff from the Sub-Projects.	staff from the Projects within the Program.
Schedule	Can have its own schedule.	Can have its own schedule and it will include	Cannot have its own schedule. It only has
		the schedule from the Sub-Projects.	the schedules from the projects within the
			Program, but it can have milestones.
Baseline	Can be Baselined (multiple times)	Can be Baselined (multiple times)	Cannot be Baselined, but the Projects and
			Master Projects within the Program can be
			Baselined.
Work Breakdown	Can have a WBS with assignments,	Can have a WBS with assignments, actuals	Cannot have a Work Breakdown Structure,
Structure	actuals and estimate to complete data.	and estimate to complete data. This WBS	Resource Utilization, or Assignment
		includes the WBS structure of the sub-	functionality. Programs can have Milestones.
		projects.	

### Open Mic

- Who has used programs in CA PPM?
- What did you like about it? Was it Helpful?
- Any lessons learned for the group?



### Comments And Tips

- A single large project that has distinct parts and distinct Project Managers may be better broken into a Master with sub projects
- When a number of projects share the same resource group (team), they can be combined into a Master with sub projects so that they can be scheduled together to minimize resource conflicts.
- The Project Manager of a sub project can either work in their sub project or open the Master and work there (as long as they have rights for the Master). Remember that any changes in the subvproject may affect the Master project.
- Projects and Master Projects include a Hierarchy tab (Clarity 8.0 and later) that allows you to create custom roll ups of data. These Hierarchies do not affect the associated projects and can be created and deleted as needed to view the aggregate data.



When using Master Projects with MSP:

- Sometimes it is easier to manage a group of projects by grouping them together into a Master with sub projects so that Microsoft Project views or CA PPM Portlets can be used for reporting.
- A Project or Master Project can be in two or more Master Projects. Whenever the Master Project is opened in Microsoft Project, it may affect that Master Project's schedule. This can create problems when the Project or Master Project is opened in Microsoft Project as it will be scheduled based on the Master Project.

### Who Runs A Program

#### **Project Managers**

- Focus on content
- Manage projects
- Focus on scope, schedule, resources
- Perform more technical tasks
- Handle risk management
- Deal with project requirements
- Are responsible for ensuring projects get completed on time, within budget

#### **Program Managers**

- Focus on context
- Manage portfolios
- Focus on people, politics, and negotiating
- Perform more strategic tasks
- Handle change management (program and environmental changes)
- Deal with business strategies and objectives
- Are responsible for maximizing ROI and value delivery



### Projects

 Typically governed by a simple management structure. The project manager is responsible for day-to-day direction, a senior IT executive integrates technology with business interests, and a business sponsor is accountable for ensuring that the deliverables align with business strategy.

### Programs

 Require a more complex governing structure because they involve fundamental business change and expenditures with significant bottom-line impact. In fact, in some instances their outcomes determine whether the enterprise will survive as a viable commercial/governmental entity.

- What do you see as CA PPM gaps with respect to OOTB Program Management?
- What are the gaps in OOTB CA PPM Program Management functionality?

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• What are you doing to resolve these?

### Some Gaps That We See

- Risk and issue escalation
- Roll-up reporting: Program Cost and Budget

- Data integrity program: Project
- Combined resource management
- Status report consolidation
- Project instance rights

### Rego: Risk And Issue Escalation Process



## Rego: Roll-Up Reporting

- Identify a reporting level on: Issues, Risks and Tasks
- Define custom portlets to pull in items based on the reporting level

#### **Budget/Plan/Actual for Program and Projects**

Program Financials St	ummary								-
Summary	Benefit - Total	Benefit - Total Budget - Total		ost Plan - Total	Actual Cost - To	ETC - T	otal	EAC - Total	
Program	700,000.00	1,180,000.00		1,180,000.00					
Projects Total	105,000.00	59,360.00		59,360.00	0.00		9,450.	00	9,450.00
									Displaying 1 - 2 of
Program Financials D	etail								
Program Financials De Project Code▲	etail Project Name		Benefit - Total	Budget - Total	Cost Plan - Total	Actual Co	ost - Total	ETC - Total	
-			Benefit - Total 105,000.00	Budget - Total 54,360	Cost Plan - Total 54,360.00		ost - Total 00		EAC - Total
Project Code∡	Project Name			_				ETC - Total	EAC - Total
Project Code▲ PRJ0198	Project Name Test Release Project 1 - Bishnu			_				ETC - Total	EAC - Total
Project Code▲ PRJ0198 PRJ0199	Project Name Test Release Project 1 - Bishnu Test Release Project 2 - Bishnu			_				ETC - Total	EAC - Total



### Rego Data Integrity Program: Project

Program Fields



Use of a Scheduled Process keeps program and project fields in sync



### Rego: Program Resource Management

Resou	irce Planning: A	Allocations							🔊 🗿 🐉	🛓 Scenar	rio: [Select]
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	Requirement Name	1		Investme	ent Name						
	Resource Name			Investment	Manager						
	Resource ID				Program Test Pr	ogram 1 - Bishnu	01	÷			
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Filte		Save Filter	Clear								
						•		All	ocation		
	Resource	<b>A</b>	Investment Role	Investment		4/20/15	4/27/15	5/4/15	5/11/15	5/18/15	5/25/15
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### Rego: Status Report Consolidation

The Rego Program Report displays a consolidated view of the Program and all of its parts, including key accomplishments, scope, cost, effort and financial performance. Dashboards have also been developed to drill into this information in real time.

Project ID	PRJ31502 Portfolio Lead JASON LE												ndicators	
UCMG ID	0000200009			IT Owner			D MATZDORF	-	Overal				ost	
Status Report Date	11/6/2014								overall			- · ·		
Project Manager	MICHAEL MEYERS				roject Manage		AEL MEYERS		Scope		-	📫 🍳	uality	
Program Manager	RIAN FIERROS			Business P	rogram Manag	ger								
Program Director	CHRISTI RICE			Business C	wner	MICH	AEL MEYERS	EL MEYERS Schedule 😵 🔶 Benefit						
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### Rego: Project Instance Rights

Instance Rights can be useful in maintaining Programs and/or Master Projects. Admins are hesitant to use them due to the difficulty of keeping Instance Rights current.

The Rego Resource Rights portlet displays information for all global, OBS, and instance based rights that are present in the system. This portlet can easily determine who has certain rights.

Resource Rights *									
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ministrator, Clarity	admin	Admin Code - XOG Access	Global Right	USER	User	Creator			
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# Questions?

# Thank You For Attending regoUniversity

### **Instructions for PMI credits**

- Access your account at pmi.org
- Click on Certifications
- Click on Maintain My Certification
- Click on Visit CCR's button under the Report PDU's
- Click on Report PDU's
- Click on Course or Training
- Class Name = regoUniversity
- Course Number = Session Number
- Date Started = Today's Date
- Date Completed = Today's Date
- Hours Completed = 1 PDU per hour of class time
- Training classes = **Technical**
- Click on I agree and Submit





**Phone** 888.813.0444



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