

Program Management | Best Practices

Your Guides: Rob Greca and Jen Scarlato

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?
- 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?

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

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 subproject 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.

Comments And Tips

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

Programs Are Managed Differently Than Projects

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.

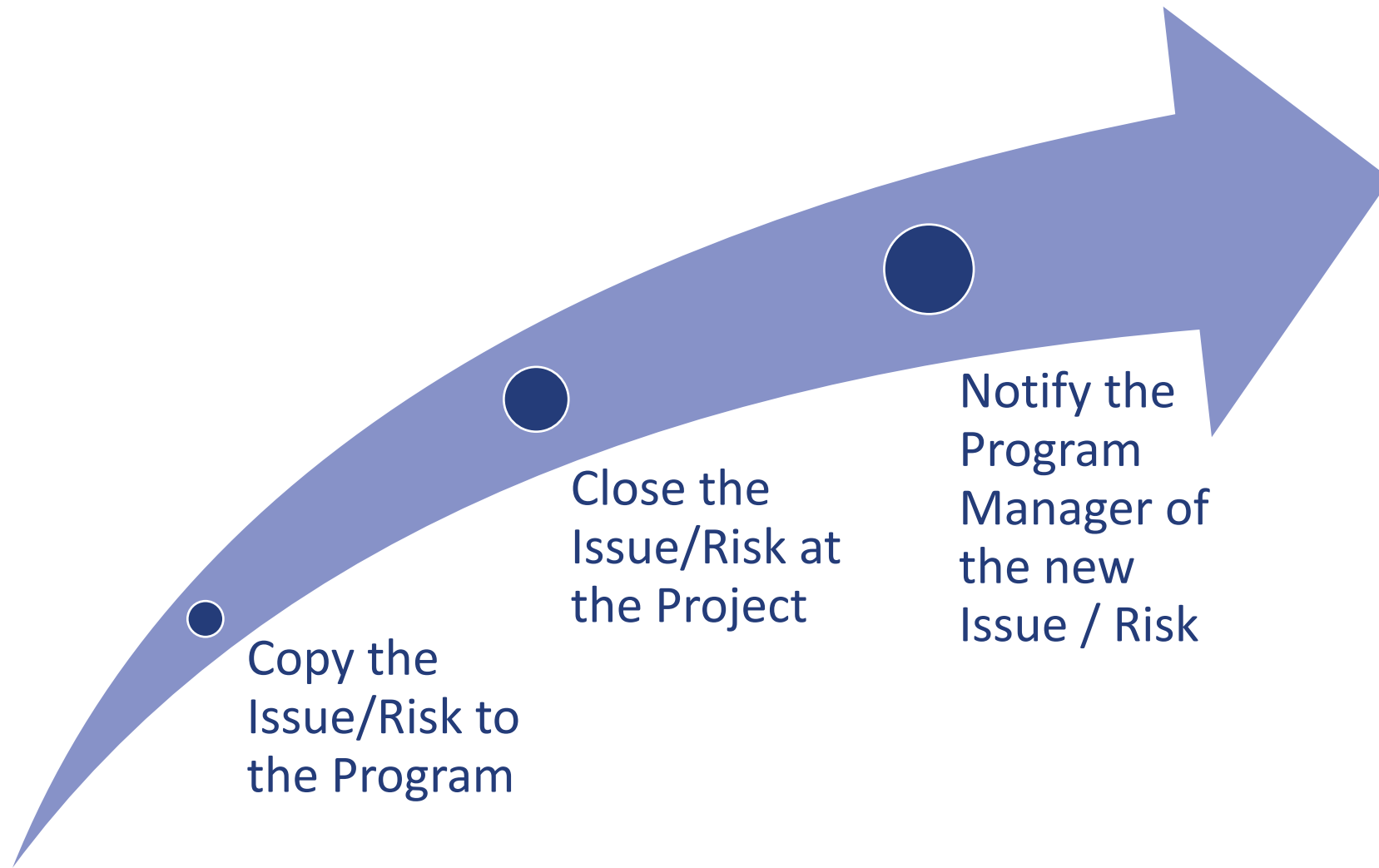
Discussion

- 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?
- 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: Test Program 1 - Bishnu - Test 

Program Financials Summary 						
Summary	Benefit - Total	Budget - Total	Cost Plan - Total	Actual Cost - Total	ETC - Total	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

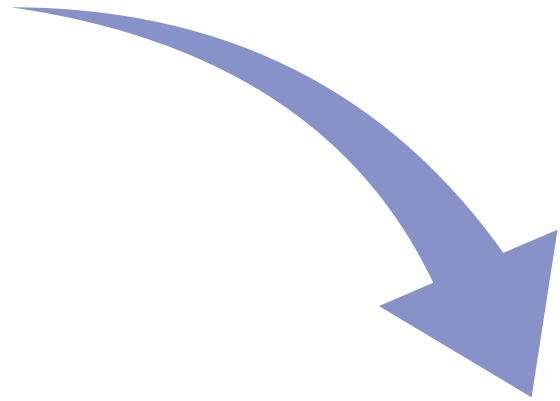
Displaying 1 - 2 of 2

Program Financials Detail 							
Project Code▲	Project Name	Benefit - Total	Budget - Total	Cost Plan - Total	Actual Cost - Total	ETC - Total	EAC - Total
PRJ0198	Test Release Project 1 - Bishnu	105,000.00	54,360	54,360.00	0.00	9,450.00	9,450.00
PRJ0199	Test Release Project 2 - Bishnu						
PRJ0200	Test Release Project 3 - Bishnu						
PRJ0201	Test Release Project 4 - Bishnu						
PRJ0202	Test Cost Plan Migration Project 5 - Bishnu		5,000	5,000.00			

Displaying 1 - 5 of 5

Rego Data Integrity Program: Project

Program
Fields



Project
Fields

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

Rego: Program Resource Management

Resource Planning: Allocations Scenario: [--Select--]

Weekly Detail

Requirement Name

Resource Name

Resource ID

Resource OBS

Resource OBS - Filter Mode

Resource Type

Booking Status

Request Status

Investment Name

Investment Manager

Program

Investment OBS

Investment OBS - Filter Mode

Approved


















Power Filter

						Allocation					
		Resource	Investment Role	Investment		4/20/15	4/27/15	5/4/15	5/11/15	5/18/15	5/25/15
<input type="checkbox"/>	<input type="text" value="Chouhan, Vipin"/>	<input type="text"/>	<input type="text"/>	Test Cost Plan Migration Project 5 - Bishnu	Allocation	8.00	8.00	8.00	8.00	8.00	8.00
					Hard Allocation	8.00	9.60	8.00	8.00	8.00	8.00
					ETC	8.00	9.60	8.00	8.00	8.00	8.00
<input type="checkbox"/>	<input type="text" value="Chouhan, Vipin"/>	<input type="text"/>	<input type="text"/>	Test Release Project 1 - Bishnu	Allocation	4.00	4.00	4.00	4.00	4.00	4.00
					Hard Allocation	4.00	4.00	4.00	4.00	4.00	4.00
					ETC	4.00	4.00	4.00	4.00	4.00	4.00
<input type="checkbox"/>	<input type="text" value="Chourey, Sangeet"/>	<input type="text"/>	<input type="text"/>	Test Cost Plan Migration Project 5 - Bishnu	Allocation	12.00	12.00	12.00	12.00	12.00	12.00
					Hard Allocation	12.00	12.00	12.00	12.00	12.00	12.00
					ETC	12.00	12.00	12.00	12.00	12.00	12.00

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.

Program Detailed Status: 1 - Michael Cascade Program (Project)

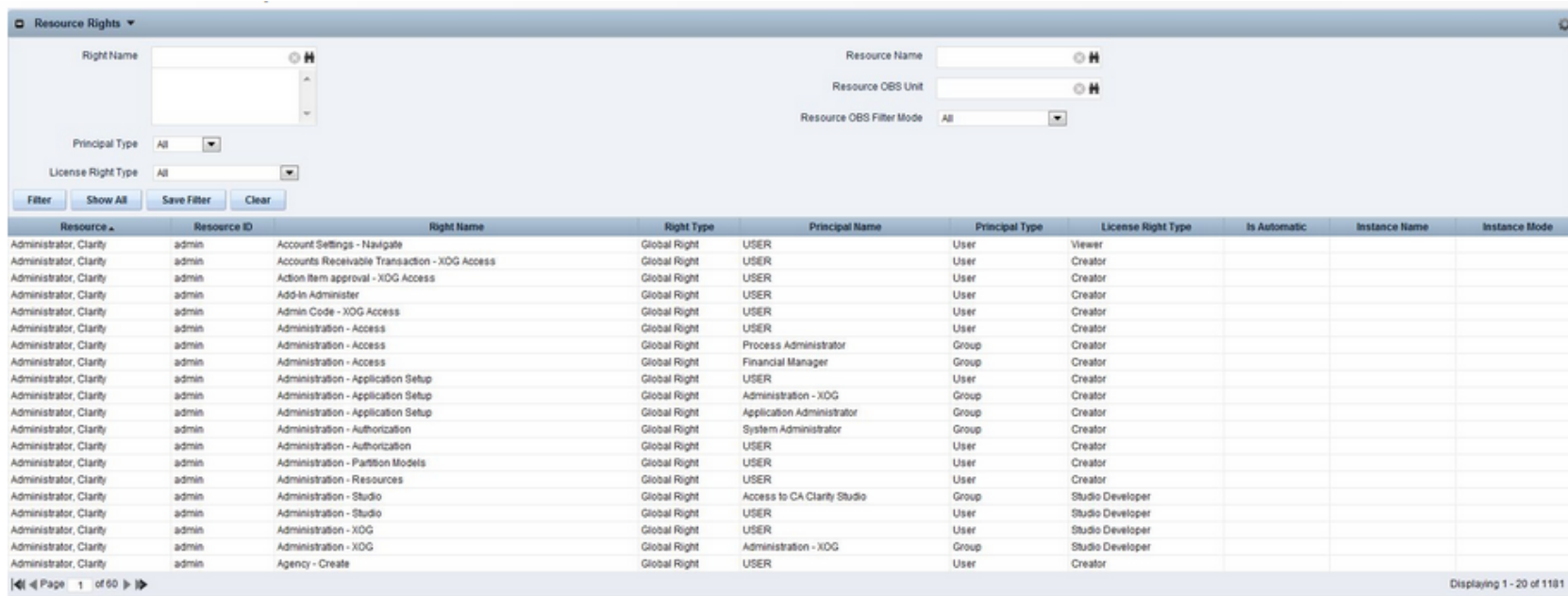
Project ID UCMG ID Status Report Date Project Manager Program Manager Program Director		Portfolio Lead IT Owner Business Project Manager Business Program Manager Business Owner		JASON LEFFINGWELL DAVID MATZDORF MICHAEL MEYERS MICHAEL MEYERS MICHAEL MEYERS		Status Report Indicators								
						Overall	  Cost							
						Scope	  Quality							
						Schedule	  Benefit							
Project Objective														
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Status Report Update														
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Key Accomplishments				Near Term Planned Activities										
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Outside Dependencies				Scope Status Comments										
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Schedule Status Comments				Cost and Effort Status Comments										
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Quality Status Comments				Benefits Status Comments										
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Financial Performance														
Program/Project/Sub-Project Name		Overall Status	Actuals	ETC	Effort (Hours)		Cost (\$1000s)							
					Baseline	EAC	Hours Variance	Hours Variance %	CY FCAP	CY ACAP	Actual Cost	Budget Plan	Cost Plan	Cost Variance
1 - Michael Cascade Program (Project)			0.00	0.00	0.00	0.00	0.00	0.00	10.00	20.00	0.00	0.00	0.00	0.00
2 - Michael Cascade Project (Under Program)			37.00	5.00	13.00	42.00	-29.00	-223.06	10.00	20.00	0.00	0.00	0.00	0.00
3 - Michael Cascade Sub-Project			8.50	19.00	18.00	27.50	-9.50	-52.78	0.00	0.00	0.31	0.00	1.62	-1.62
Totals:			45.50	24.00	31.00	69.50	-38.50	-124.19	20.00	40.00	0.31	0.00	1.62	-1.62
Current Associated Risks														
Risk	ID	Description	Calc Risk	Priority	Escalated	Probability	Impact	Status	Response Type	Target				
Test Risk	RSK00459	asdfaf						Open	Watch	11				
test risk 2	RSK00461	asdf						Open	Watch	11				

Date: 12/15/2014

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	Resource ID	Right Name	Right Type	Principal Name	Principal Type	License Right Type	Is Automatic	Instance Name	Instance Mode
Administrator, Clarity	admin	Account Settings - Navigate	Global Right	USER	User	Viewer			
Administrator, Clarity	admin	Accounts Receivable Transaction - XOG Access	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Action Item approval - XOG Access	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Add-In Administrator	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Admin Code - XOG Access	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Access	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Access	Global Right	Process Administrator	Group	Creator			
Administrator, Clarity	admin	Administration - Access	Global Right	Financial Manager	Group	Creator			
Administrator, Clarity	admin	Administration - Application Setup	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Application Setup	Global Right	Administration - XOG	Group	Creator			
Administrator, Clarity	admin	Administration - Application Setup	Global Right	Application Administrator	Group	Creator			
Administrator, Clarity	admin	Administration - Authorization	Global Right	System Administrator	Group	Creator			
Administrator, Clarity	admin	Administration - Authorization	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Partition Models	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Resources	Global Right	USER	User	Creator			
Administrator, Clarity	admin	Administration - Studio	Global Right	Access to CA Clarity Studio	Group	Studio Developer			
Administrator, Clarity	admin	Administration - Studio	Global Right	USER	User	Studio Developer			
Administrator, Clarity	admin	Administration - XOG	Global Right	USER	User	Studio Developer			
Administrator, Clarity	admin	Administration - XOG	Global Right	Administration - XOG	Group	Studio Developer			
Administrator, Clarity	admin	Agency - Create	Global Right	USER	User	Creator			

Questions?



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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**



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