

Programs & Organizations

Creating Programs

Grouping Projects into Programs

Projects may be categorized into "Programs" by editing the Project Profile document and the field labeled **Program**. This is a keyword field that displays the list of existing programs and lets you select one or create a new one. Typically you might use program names like "Development", "Maintenance", or "Research" to divide your projects into convenient reporting categories.

The program hierarchy is used to group projects on the Project Dashboard. It is also used to provide subtotals in views such as workload forecast by project, time summaries by project and the Project Outline views.

Your choice of programs will affect the utility of the repository, particularly to your management community. Many organizations already have a structure of initiatives and programs that can be encoded using the Program structure to make reporting fit the existing expectations. Try, however, to simplify this existing structure wherever possible.

Programs can be defined in a hierarchy with several levels. For user convenience, we suggest using no more than 3 or 4 levels of hierarchy. This provides adequate capability to organize hundreds of projects for reporting. If all projects belong to a single "top level" initiative, there is no need to create a top level program. All views that provide subtotals at the program level also provide a grand total, so a top level program is redundant.

The Program structure should be separate from the Organization structure. The program structure should reflect the nature and purpose of the projects (e.g., Customer Service Initiative\New Development\Accounting), while the organization structure should reflect the ownership of resources used to implement them (e.g., US Region\Western Applications Center\McCarthy Team).

Programs are created by creating "Program Profile" documents. Then existing, or new projects, can be assigned to the programs using the Program field in the individual Project Profiles.

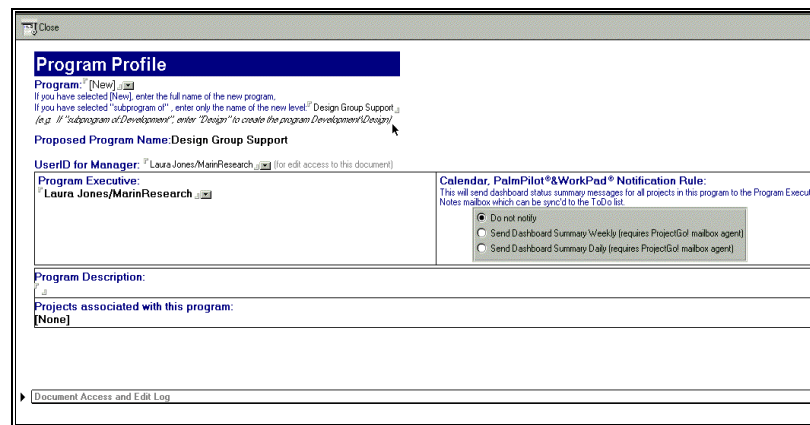
When projects are added to the repository using the Project Gateway publishing tools, you will be prompted to select an appropriate program for the new project.

Program Profiles

Program profile documents provide links to higher and lower level programs and to all the projects that are part of that program.

To create a Program Profile, you start from the Project Information navigator screen and select the item "Create a new program".

This will display a new program form similar to the following:



The screenshot shows a web form titled "Program Profile" with a "Close" button in the top right corner. The form contains several sections:

- Program:** A dropdown menu set to "[New]". Below it, instructions state: "If you have selected [New], enter the full name of the new program. If you have selected 'subprogram of', enter only the name of the new level. Design Group Support. For 'subprogram of/development', enter 'Program' to create the program Development/Design".
- Proposed Program Name:** A text field containing "Design Group Support".
- UserID for Manager:** A text field containing "Laura Jones/MarinResearch" with a link "(for edit access to this document)".
- Program Executive:** A text field containing "Laura Jones/MarinResearch".
- Calendar, PalmPilot® & WorkPad® Notification Rule:** A section with a note: "This will send dashboard status summary messages for all projects in this program to the Program Executive's Notes mailbox which can be sync'd to the ToDo list." It includes three radio button options: "Do not notify" (selected), "Send Dashboard Summary Weekly (requires ProjectGol mailbox agent)", and "Send Dashboard Summary Daily (requires ProjectGol mailbox agent)".
- Program Description:** A text area with a small icon above it.
- Projects associated with this program:** A text field containing "[None]".
- Document Access and Edit Log:** A link at the bottom left.

Here we selected the Program [New] and entered the new program name "Design Group Support" in the field provided. Then we entered a user name for the program manager, set the system to send dashboard updates daily to your mailbox, and added a program description. Close and save.

Note: If your user name is entered as the first entry in the User ID field, a link to this profile will appear on the Web Repository Center "My Responsibilities" page.

Creating Hierarchies

Programs are often defined in a tree structure with subprograms when large numbers of projects are being managed. Each subprogram will have subtotals created on the project dashboard and other views.

When you create a new program, then Select field at the top of the form provides a list of existing programs written as "subprogram of " followed by the program name. To construct a hierarchy, you first define the top level program, and then create additional programs using the "subprogram of" options.

For example, to create the subprogram "Palo Alto" in the Program "Design Group Support" you create a new program profile in which you select "subprogram of Design Group Support."



The full program name is constructed from the parent name and the new name you enter for this level. This process can be repeated to construct a complete program tree. Note: If you are the manager of both a program and a subprogram, do not set the notification rule on both or you will get duplicate dashboard messages sent to you.

Assigning Projects To Programs

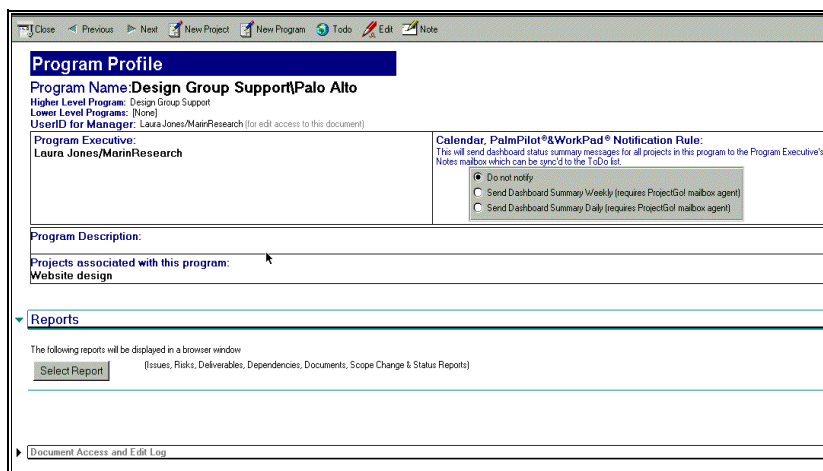
To assign an existing project to a program, edit the project profile and use the drop list on the "Program" field to choose the program.



To assign a program to a new project, set the program field to one of your program titles when you compose the "Create A New Project" form.

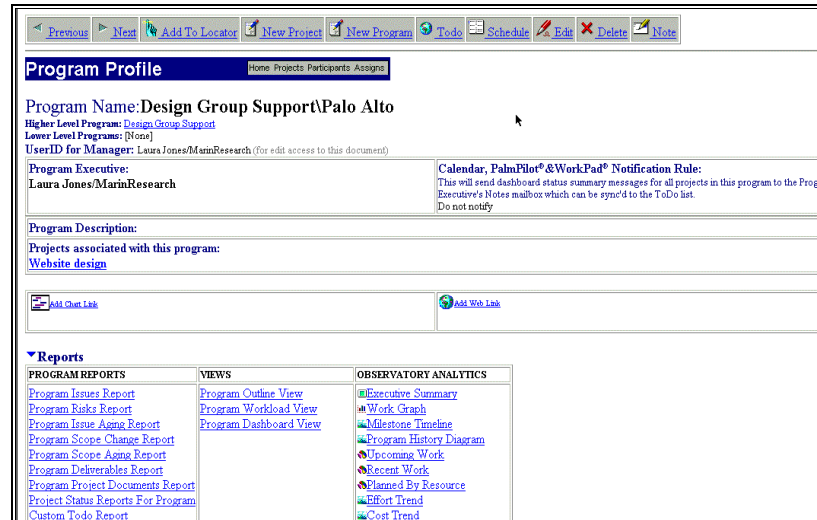
When importing projects in to repositories that have existing programs, the Project Gateway system will display a dialog box asking you to pick the appropriate program for the new project.

Once projects are associated with programs, you can open the program profile document and see a list of the projects.



When you open a program profile from a web browser you will notice that the subprograms are hyperlinked to the parent programs and vice versa. Each project that is a member of the program will be hyperlinked to the project profile that is in turn hyperlinked to the program profile.

Action links at the top of the form let you create new projects or new programs. Hotspots in the Program Profile banner send you to repository center, and to the projects, participants, project assignments, and project documents navigators.



Actions Available on Program Profiles

New Project, New Program

These actions create new documents.

Todo

This will generate the program calendar. When used from Notes, and options panel is displayed allowing you to customize the information to be gathered. When used from a browser all information is gathered by default, but there is also a Custom Todo Report link shown in the Reports section that will allow a choice of data items.

The Program Calendar is generated by amalgamating the information that would be displayed on the calendar of all of the underlying projects. This can take quite a long time to construct if there are many projects in the program. By using the options settings, you may be able to both decrease the time required and make a more readable calendar.

Schedule

This will record events for the program that will show up on the calendars of this and higher level programs.

Note

This will allow you to send a quick note to the manager, or yourself or your journal concerning this program.

Add to Locator (Web Only)

This will add the program to your favorites list on your repository locator page.

Updating the Repository with program changes

When a project's program is first set or changed, the existing assignments must be updated in order for the views to properly display the project work. This is done by a background agent, "**Maintain Organization**" that is normally scheduled to run periodically to do the same thing. This is usually scheduled to run at night, so changes will not be visible until the next morning.

If you are in a hurry to implement the new program structure, you may use the manual agent "**Admin\UpdateOrganization**" from the Notes menu. This forces the changes to be made immediately, but may take some time in a large database, and can only be used if you have appropriate rights to modify all the assignments in the database.

Note: When the program is set at the time the project is created, whether manually or by importing a project plan, all assignments will automatically have the correct program name. The Update procedure is only necessary when the program changes are made after the project assignments have been published.

Hidden Programs

A Hidden Program is any program name that begins with the [character. For example, [NotApproved] would be a hidden program. If you associate a project with this program, the projects' assignments will not be visible to the project team, but the project will still appear in the workload forecasts.

In the standard repository, projects that belong to hidden programs do not appear in the Assignments by Person or Assignments by Person by Project views. This allows you to post projects into the repository without putting them into the work lists of your staff. The primary reason for doing this would be for workload analysis, or because you anticipate starting a project that is not yet committed.

Organizations

The organization hierarchy defines the logical ownership of resources and provides a reporting structure for schedule and workload information.

Since you already have some kind of natural company structure, it may be convenient to use this as the basis for your organization tree. In order to make the database more readable, it is important to limit the number of levels of the hierarchy to no more than 3 or 4. This is probably fewer than the levels of your company organization chart, so some compromise may be necessary.

If everyone using the Repository is part of a top level group (e.g. Information Systems) then the top level group should not be defined since totals for the database will be generated anyway.

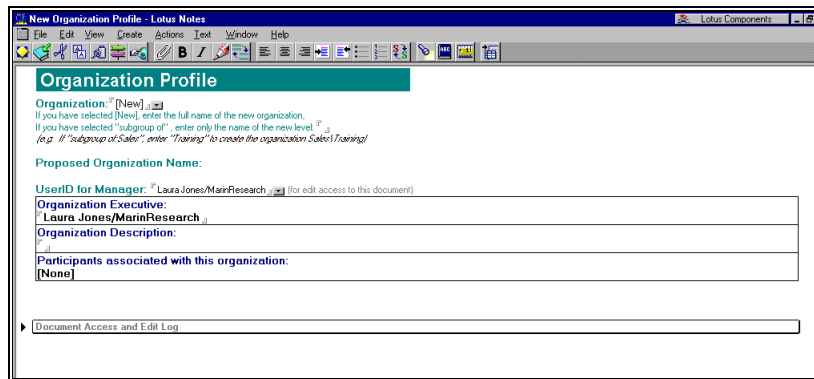
Once you have defined your organization structure, you should assign all of your participants to the organization unit to which each belongs.

When a participant has an organization category, all the views that are sorted by participant will be further subdivided by Organization. This means that views such as Assignments by Person will be categorized by Organization first and participant name second. Views such as Participant Workload Forecast will tabulate workload against the Organization levels and sub-tabulate it by person within the organization.

Creating a New Organization Profile

Normally, the organization profile documents will be created by the system administrator before the participant profiles are created so that the organization can be selected at the time the participant is setup.

Pick the "create a new organization profile" item from the Participants Navigator. This will display the "Organization Profile" form.



Select [New] from the list and enter the name of the new organization.

Attaching organization profiles to existing organization codes (special case for imported participants)

Project Gateway has the option to allow participant profiles to be created automatically for project plan resources when those projects are imported into the repository for the first time. Part of this process allows the *group name* associated with the participant to be recorded into the new participant profile as the Organization name of that participant.

Because of this, it is possible to have Organization names in use in your repository that do not have Organization Profile documents. While this is not particularly harmful, it does limit reporting and can cause some additional work for users at later times.

Hence, you should create Organization profiles for any organization names that are already in use. We have made this very easy to do.

When you create a new organization, you have to select an entry from the list provided. This list will have three parts. The first part will be a collection of the names of any organizations that are assigned to participants but not represented by Organization profiles.

After this will come the word [New]. After that will come the [subgroup of....] items that allow you to build subgroups from your existing organizations.

So, simply create an Organization document for each item in the first part of the list. As you create each document, the remaining list will be reduced until it is empty. At that point, all organizations will have profile documents and the droplist will begin with [New].

Creating Organization Hierarchies

When you create a new organization profile, the first item will contain items of the form "subgroup of ". Pick the one that corresponds to the parent and then enter a name for this level. For example, to create the Organization "San Francisco Lab" within the existing organization "Development" you would select "subgroup of Development" from the list and enter "San Francisco Lab" as the name of the new level. This would create the two level name "Development\San Francisco Lab".

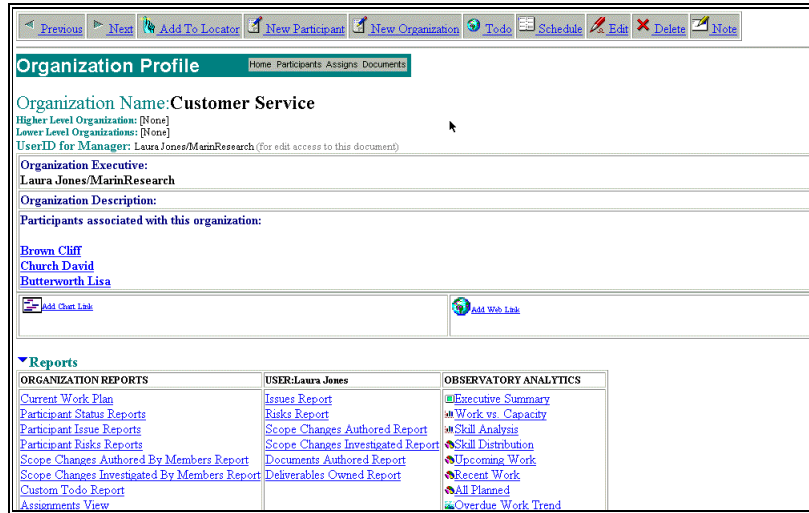
Assigning Participants To Organizations

The Participant Profile Document has a field labeled "Organization." This provides a list of existing organizations. Select the correct one for the participant and save the updated participant profile.

Updating the repository when participants change Organizations

When a participant's organization is first set or changed, the existing assignments must be updated in order for the views to properly display the project work. This is done by a background agent, "**Maintain Organization**" is normally scheduled to run periodically to do the same thing. This is usually scheduled to run at night, so changes will not be visible until the next morning.

If you are in a hurry to implement the new organization structure, you may use the manual agent "**Admin\UpdateOrganization**" from the Notes menu. This forces the changes to be made immediately, but may take some time in a large database, and can only be used if you have appropriate rights to modify all the assignments in the database.



Organization Profile in a web browser showing links to members, repository and observatory reports.

Actions Available on Organization Profiles

New Participant, New Organization

These actions create new documents.

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