# Programs

## Introduction

Programs are logical collection of projects that have common characteristics, objectives and management.  Programs consolidate information from multiple projects into useful reports.

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.

Each program has a Program Profile document. Once a program profile has been created, you can associate new and existing projects with it.

Programs can be self contained or can be constructed in hierarchies of programs and subprograms.

The Program structure should be separate from the Organization structure.  The program structure should reflect the nature and purpose of the projects, while the organization structure should reflect the ownership of resources used to implement them.

Even if your people and projects are exactly aligned, you should name the entities so as to avoid confusion.  Having a  "Technology Group" for your organization and "Technology Projects" for your program is much better than having both a "Technology" organization and a "Technology" program.

## Creating Programs

***Notes client:***

From Repository Center, click Projects, and then "Create a new program".

***Web browser:***

From Repository Center, click "Create" and select "New Program" from the droplist.

### *To create a new "Top Level" program:*

Select "[New]" in the first field

Enter the program name in the second field.

e.g.  Select [New] and enter "Development"  to create a first level program named "Development"

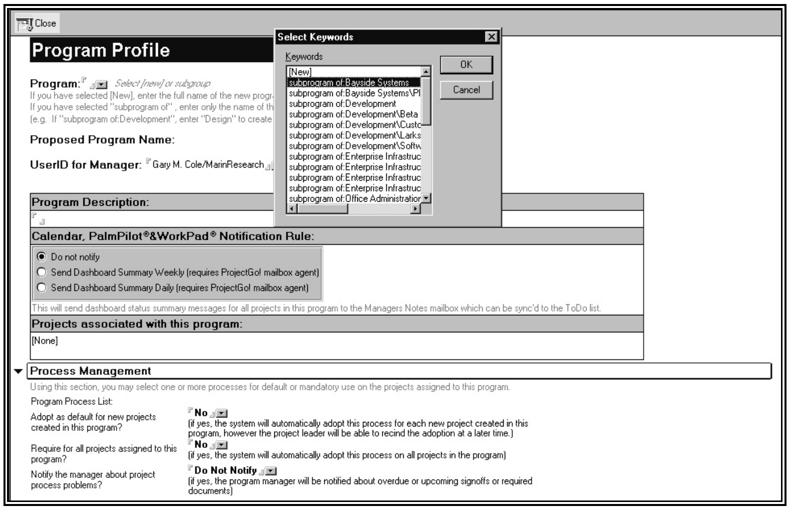
### *To create a new "Subprogram":*

Select "[subprogram of ... program name] in the first field

Enter the name of the subprogram into the second field.

e.g.

Select [subprogram of Development] and enter "Support" to create a subprogram whose full name is Development\Support.




*Creating a new program as a subprogram is done using the first droplist.*

### *User ID for Manager:*

Enter the name of the program manager.  More than one name can be listed.  Note, you must be in this list in order to make further changes to this document unless you have the [PGADMIN] role.  The members of this list will all be members of any approver list that involves the program and will receive dashboard notifications.

### *Program Description:*

Enter a description of the program.

***Close or Submit the new document to create the program.  You can then reopen it to make changes and set other options.***

## Program Profile - General Information

### *Program Name*

This shows the full name of the program. A backslash separates levels in the hierarchy.  Development\Support\Accounting is the name of a third level program.

### *User ID for Program Manager*

This person will have the right to modify the program profile document. The first name in the list will be used as the manager of the Project Observatory Program Report.

### *Program Description:*

This can be used to help others understand the mission of the program so that projects can be properly organized.

### *Calendar Notification Rule*

This will instruct the system to send emails to the manager that provide summary status about each project in the program.

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.

Note if you have Project Observatory at your installation, do not use this notification function because that application will provide more informative weekly reports for you.

### *Projects Associated with the Program:*

This displays a list of projects belonging to the program. Only the first 100 are listed. When imaged in a web browser, the project names are linked to open the project profile documents. This association is a property of the project and is set and changed in the project profile.

## Program Profile - Reports

**Web browser:**

This provides links to a large variety of program level reports and views.

**Notes Client:**

The button provided in this section will offer a selection of reports that will open in a browser window. Other reports are available using the Gantt, and Incomplete action buttons at the top of the form.

### *Incomplete Checklists Report*

This will list all incomplete checklist items in all projects in the program.

### *Program Issues Report*

This will list all issues in all projects in the program. The report a formatting control panel to allow many variations.

### *Program Risks Report*

This will list all issues in all projects in the program.

### *Program Issue Aging Report*

This will generate a matrix of projects and age ranges to categorize issues.

### Program Scope Change Report

This will list all scope changes in all projects in the program.

### Program Scope Aging Report

This will generate a matrix of projects and age ranges to categorize scope changes.

### Program Deliverables Report

This will list all deliverables associated with the projects in the program.

### Program Project Documents Report

This will list all the project documents associated with the projects in the program

### Project Status Reports for Program

This will list the recent status reports for each project in the program. This is organized by project.

The user may select Basic, Standard, or Full presentation of the reports. In the Basic mode, only one line per report is created. In the Standard mode, a second row appears under the title field showing the "body" of the report. In the Full mode, three additional rows appear showing the "Achieved", "Next Week", and "Problems" sections of the report.

The user may now control the selection of reports to be included. The options are "LATEST", 2, 4, 13, and ALL REPORTS. The LATEST option will show only the most recent report. The 2, 4, 13 will limit the results to show only that many reports for each project (if available).

Status Report Reports generated from the program level will show both project and participant reports coded to those projects.

### Custom Todo Report

This will generate a calendar report after allowing you to select the specific kinds of information to be included. Note that program calendar reports that include tasks and checklist items can become very crowded.

### iCalendar Subscription

This will create a URL that will provide program calendar information in the Internet standard iCalendar format supported by applications such as Apple iCal and Mozilla Sunbird.

### Program Dependencies Report

This will compile a list of all InterProject, Calendar, and Date dependencies in the projects of the program. This is organized by project.

### Process Usage

This will show, for each project in the program, the adopted processes and the current stage and list of signoffs obtained for each.

### *Process Experience Report*

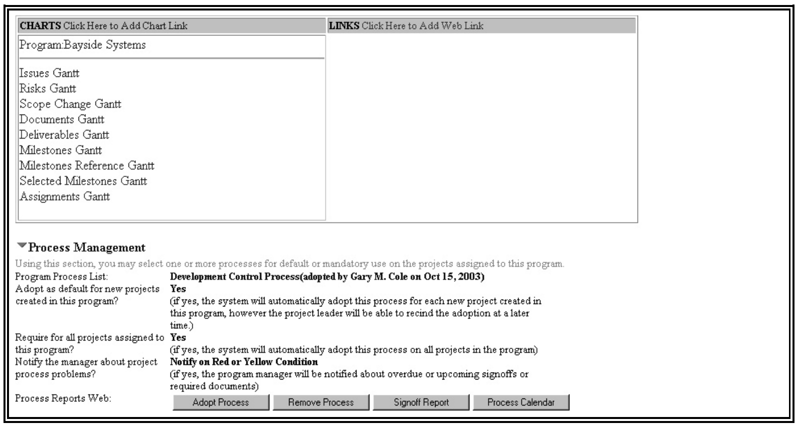
This report shows for each process, a matrix showing the required signoffs as columns and the projects as rows.   Any combination of 37 different statistics that were collected at the time of the individual signoffs can be shown in the table cells.  The purpose of this is to allow you to compare projects at consistent points in their lifetimes.

# Program Profile - Charts

This web only section will list predefined charts that you have selected, links to a variety of specialty Gantt format charts about the program, and provides a place to put arbitrary web links specific to the program.

## Standard Gantt Charts

All programs can have custom program level Gantt charts created and maintained by the system agents.  See the chapter Using Graphics for details.




*The charts and process sections of a program profile as seen in a web browser.*

## Specialty Gantt Charts

A variety of specialty Gantt charts are available at the program level which are created on request in PDF format.

Note that the row numbers at the left of these charts are hyperlinked to the related documents.

***Notes client:***

Use the Gantt Action at the top of  the form and select from the dialog provided.

***Web browser:***

Use the links found in the "Charts" section of the profile document.

Please note that, depending upon many factors, the time required to produce these charts may be significant. In some cases, web browsers may time out while waiting or you may encounter as server time-out. In these cases you may need to use the Notes client to get the chart or run the same chart request at the project level.

### Issues Gantt

This creates a unique Gantt chart in which each row is an issue, grouped into outline levels by the owning project. The dates show the span from the date the issue was originated to the date it was closed, or to the due date if the issue remains open. The color of the bar also show the status, red if open, blue if closed. There is a summary bar for each project showing the span of issue dates in that project.

Note that, any issue showing red that is to the left of the dashed red "today" line is overdue.

This chart clearly shows whether issues are resolved promptly or drag out and lets program managers assess the project managers performance in issues management.

### Risks Gantt

This is similar to the Issues Gantt except that only Risks are shown.

### Scope Change Gantt

This is similar to the Issues Gantt except that Scope Changes are shown.

### Documents Gantt

Again, similar to issues, the lifetime of each document is shown as a Gantt Bar. Approved documents are shown as blue, unapproved as red.

### Deliverables Gantt

Again, similar to issues, but note that shows only deliverables owned by projects.

### Milestones Gantt

### Milestone Reference Gantt

This shows the current dates and, in the second instance, the reference dates of all key events, grouped by project, for the program.

***These charts will include all InterProject dependencies that are between projects belonging to this program.*** If the IPD is to a project not within the program, there will be a link shown that ends or begins with an asterisk. Links with the program will either connect directly if on the same page or will show the row number of the connected even if on different pages.

### Selected Milestones Gantt

In the system administration form, the administrator can define one or more "milestone groups".

From each project profile, the project leader can create a subset of the milestones in that project under the name of each milestone group.

Here at the program level, the user can select the name of a milestone group. The system will then display, for each project, only the key events that have been selected by the project managers in the named group.

For example, the projects might define one set of key events as "Engineering" and another as "Customer Commitments". Then at the program level you can generate a Selected Milestone Gantt showing either of the milestone groups.

This can also be used to simply reduce all projects to a small number of management key events so that the program status is easily visualized without restricting the number of key events actually used in each project.

### *Assignments Gantt*

This chart may not be available for large programs because of its size. This will show all assignments in the projects of the program, grouped by project. There is a maximum size of about 30 pages.

Dependency links within the individual projects are shown. Links within will either connect directly if on the same page or will show the row number of the connected even if on different pages.

## Program Profile - Process Management

### *Program Process List*

This is a list of all processes that have been adopted by this program for use by the assigned projects. This list is created and managed by the use of the Adopt and Remove buttons. Note that you must be in "read" mode to change this list, but in edit mode to change the next three selections. So, set the list first, then enable the options as desired.

### *Adopt as default for new projects created in this program [Yes/No]*

If set Yes, then every new project assigned to this program will automatically adopt the listed processes. The project leader, however, will have the ability to remove any processes he or she does not feel to be necessary for the particular project.

### *Require for all projects assigned to this program [Yes/No]*

If set Yes, then every new project assigned to this program will automatically adopt the listed processes and they will be mandatory for the life of the project. The project leader will have no choice other than to comply with the requirements of all of the selected processes.

### *Notify the manager about project process problems*

***Choices:***

[Notify Only if Condition is Red]

[Notify on Red or Yellow Condition]

[Do Not Notify]

The system periodically reevaluates the condition of each project with respect to its process obligations. A condition flag is set in each project based upon the outcome of this evaluation and a detailed email is sent to the project manager. There are three conditions. Condition Red indicates that some process step or document requirement is overdue. Condition Yellow indicates that some process action will be required in the very near future. Condition Green indicates that the project is in compliance with all process requirements.

This option determines whether or not the program manager will also be notified about changes in the process condition of any of the assigned projects.

### *Process Action buttons*

#### *Adopt Process*

This will display a process adoption page or dialog box allowing you to select a process to be added to the process list of the program.

#### *Remove Process*

This will display a remove process page or dialog box that will allow you to remove one of the existing processes.

#### *Process Report (Notes only)*

This will generate a report, organized by project, showing the processes of each project, the stage of each process, and the signoffs obtained.

#### *Project Signoffs*

This will generate a report which will list each project and the signoffs that have been obtained for each.

#### *Process Calendar (Web Only)*

This will generate a variation of the program todo calendar that shows only the process events of the underlying projects. You can get the equivalent in the Notes client by selecting the Todo action with only the process signoffs option selected.

## Actions Available on Program Profiles

### *(left icon) Previous*

### *(right icon) Next*

### *(finger string icon) Add to Locator (Web only)*

This will add the program to your favorites list.

### *Project*

Will create a new project.

### Program

Will create a new program.

### Todo

This will generate the program calendar report. It is generated by amalgamating the information that would be displayed on the calendar of all of the underlying projects and the scheduled events of this program and its subprograms. 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.

When used from Notes, an 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.

### Schedule

This will record events for the program that will show up on the calendars of this and higher level programs. You must be in edit mode in a Notes client to use this action.

Program events can repeat weekly or monthly over a long time period.

### Delete

Removes the profile document. Only available to persons with the [PGADMIN] role.

### Identification

Allow you to change the name of the program. Only available to persons with the [PGADMIN] role. You must be in edit mode in a Notes client to use this action.

### Incomplete (Notes client)

Generates an Incomplete Checklist report for Notes clients. Web users will find the same report available in the reports area.

### Gantt (Notes client)

Generates the specialty Gantt charts described above for Notes clients. Web users will find these options in the Charts section.

### Note

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

### Review

This will allow you to initiate and contribute to a group review of the program. See the chapter entitled "Using Group Review" for more information and instructions.

## 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.

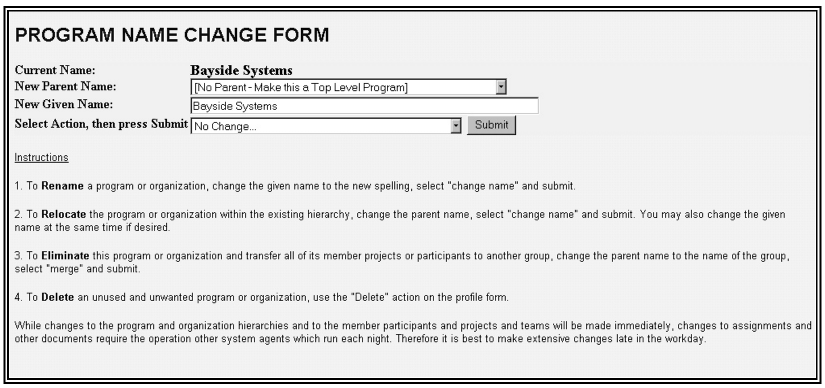
To assign a program to a new project, set the program field to one of when you fill in the "Create A New Project" form.

When importing projects into 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.

When a project is reassigned, assignments, issues, risks, scope changes and project documents need to be updated to reflect the change. These changes are done by a combination of the Update Organizations and Maintain Dashboards agents that run nightly.

## Renaming Programs

The Identification action, which can only be used by an person with the [PGADMIN] role allows you to change the name of a program.


PROGRAM NAME CHANGE FORM

**Current Name:** **Bayside Systems**
**New Parent Name:** [No Parent - Make this a Top Level Program]
**New Given Name:** Bayside Systems
**Select Action, then press Submit** No Change... Submit

Instructions

1. To **Rename** a program or organization, change the given name to the new spelling, select "change name" and submit.

2. To **Relocate** the program or organization within the existing hierarchy, change the parent name, select "change name" and submit. You may also change the given name at the same time if desired.

3. To **Eliminate** this program or organization and transfer all of its member projects or participants to another group, change the parent name to the name of the group, select "merge" and submit.

4. To **Delete** an unused and unwanted program or organization, use the "Delete" action on the profile form.

While changes to the program and organization hierarchies and to the member participants and projects and teams will be made immediately, changes to assignments and other documents require the operation other system agents which run each night. Therefore it is best to make extensive changes late in the workday.

*The web implementation of the Identification action form.*

Clicking on this action will display a dialog box (notes) that allows you to enter the new name.  When you close and save the program the system will implement the renaming.

Renaming a program will rename it and all of its subprograms.  It will cause the program name to be changed in all projects currently associated with the program.

While this completes the immediate renaming process, there are additional agents that have to run to complete the update of all other repository documents that contain the program name.

The MaintainDashboards agent will update all issues, risks and scope changes with the new program name.

The Maintain Organization agent will update all assignment documents with the new program name. Both of these should run every night. You can accelerate the process using the Admin actions.

If you are in a hurry to implement the new program structure, you may use the manual agent "**Admin\UpdateOrganization**" and then "**Admin\UpdateDashboardsNow**" from the Notes menu.

Note that renaming a program in a repository will initiate an equivalent change in an attached Project Observatory if the OMA is in use.

## Hidden Programs

Note: The use of hidden programs has been generally superseded by the introduction of project approval states. The Hidden program functionality is retained.

A Hidden Program is any program name that begins with the [ character. For example, [Not Funded] 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.

## Authorities of the Program Manager

The only direct access that is granted to program managers is the access to the program profile itself. Being the program manager does not give any rights to the associated projects or their documents.

If the program manager must have edit rights to project materials, then the program manager name must be added to the list of names in the UserID for Project Manager field on each project profile associated with the program.

### *Project Observatory Usage*

The program manager will become the "Email address of program manager" of the Project Observatory Program Report.

## Workflows involving the Program Manager

### *Document Approval*

The program manager can be included in the Document Approval and Scope Change Approval workflows specified in the policy section of the project profile.

### Signoff Approvals

The program manager can be included in a signoff definition as a required approver. In this case the choice of the program will be determined by the project requesting the signoff.

### Process Tracking

The program manager name is the delivery address of process tracking notifications.