Using Deliverables

Introduction

The deliverables facility supports top down, goal oriented, management planning and reporting. It is independent of, but closely linked, with the project management facilities of Project Gateway.

Deliverables specify specific management goals. You may, from time to time, implement projects to achieve these goals, and when you do, you can set up automatic links between project status and relevant deliverables. But it is important to understand that you can use the deliverables facility before you have projects scheduled, and that the organization of the deliverables may be quite different from that of your projects and programs.

Simply stated, a deliverable is a management goal, not a project task. As a goal it may have a target date for completion, a budget for completion, and probably will always have an assigned responsibility.

Deliverables are normally structured as trees. The top goal becomes the head of the tree and each subgoal (which we call a subdeliverable) becomes a leaf of the tree.

A deliverable should be described with a noun phrase, not a sentence. "Year 2000 Compliance" is a deliverable. It might have sub deliverables of "Accounting", "Sales" and "Manufacturing". They in turn might have subdeliverables of "GL system", "Payroll System", etc. Each might have a different person responsible and a different target date and budget.

The lowest levels of your deliverables tree may be interconnected to specific projects, groups of projects, or project events from multiple projects. Generally the deliverable will be defined before the projects are created, because the projects are created to achieve the goals set out in the deliverable. The links to projects may be added or removed at any time.

Since project information may not be available, the deliverable system provides a very flexible way to provide definition details and manual status reporting. You can define deliverables and begin using them as a management reporting tool immediately.

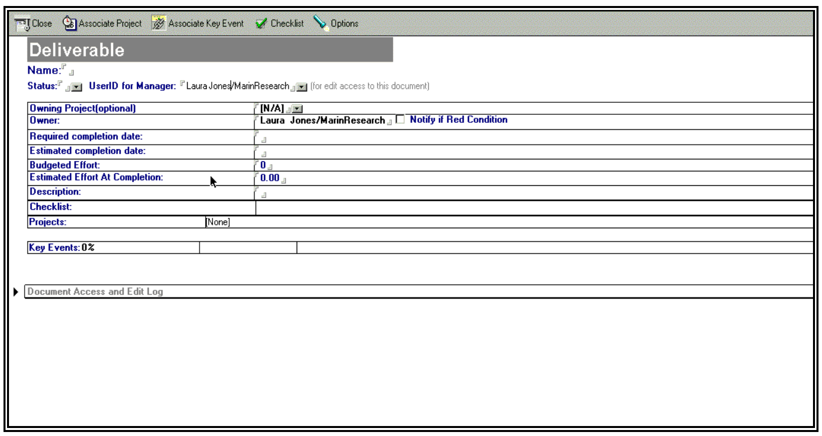
Most organizations like to believe that with enough time they can create a master work plan that optimizes everything. This is very difficult to achieve in practice. The deliverables facility lets you define a master vision that will at least encompass all of what you are trying to accomplish without requiring you to master all the details of implementation beforehand.

Creating A Deliverable

From the deliverables navigator, select "Create an new first level deliverable" to open a new deliverable form.

You can also do this from the web repository home page using the "Create A New Deliverable" item on the Create droplist.

The Deliverable Form



New Deliverable Form in Notes Client

Name

This is the title of the deliverable. Since this is a top level item, it should be short and clear.

Status

This lets you select a word or short phase to describe the status.

UserID for Manager

This should contain your User name. You may add the names of any other people who should have the right to modify this deliverable document.

Owning Project

This is the project, if any, which owns this deliverable. This allows deliverables to be used as components of projects as well as projects to be used as component s of deliverables.

Deliverables that are owned by projects can be shown in the Project and Program level Deliverables Reports.

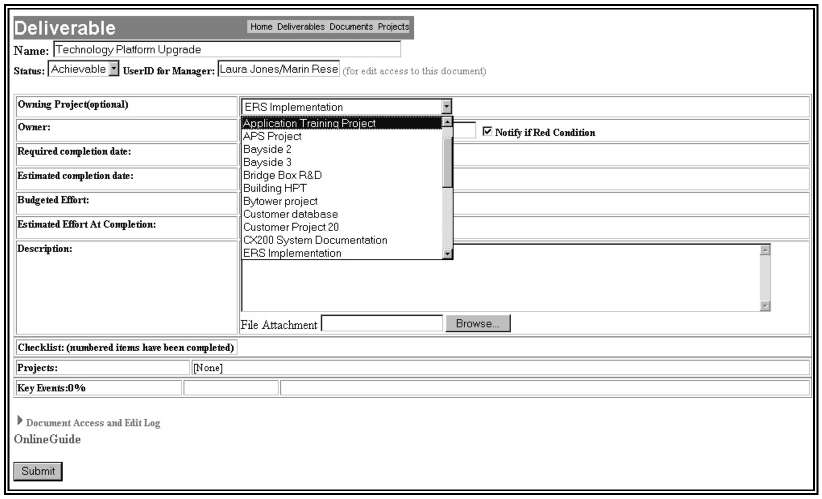
The code "[N/A]" is used when no project is specified.

Owner

This is the name of the staff member responsible for the accomplishment of the deliverable.

Required Completion Date

This is simply the date when the deliverable must be completed. It is a goal, not a computed result. If no such goal exists, then leave this field blank. If you do, the dashboard indicator will not be displayed.



Creating a project owned deliverable in a web browser

Estimated Completion Date

This is the date when the deliverable is expected to be completed. If no information is available, you should probably set this to be the same as the goal. The relationship between this date and the one above will determine the color of the indicator shown on the dashboard. There are several ways to make this field update automatically which will be described later.

Description

This is a rich text area to define the deliverable.

Checklists, Projects & Key Events

These are optional fields that are set using the action buttons on the form. They are described in more detail later in this section.

Creating Subdeliverables

Deliverables can be structured as a tree with levels of indentation corresponding to the hierarchy of goals.

To create a subdeliverable, open the parent deliverable and press the "Sub Deliverable" action button at the top of the form.

The name of this subdeliverable will be a combination of the name of the parent with a unique new name you provide for this item.

E.g. If the Parent is "System 21 Initiative" and the subdeliverable is called "Audit" then the full name of the subdeliverable is System 21 Initiative\Audit.

You never directly enter the name in this composite form, the system always constructs it.

In the deliverable dashboard view, each level of the tree is sorted alphabetically within that level. If it is important that deliverables appear in some particular order, you may want to name them with leading digits or letters (e.g., 1. Training, 2. Development or A. North America, B. Europe, C. Asia)

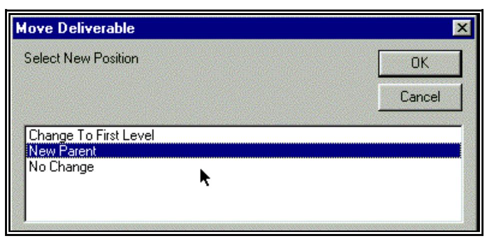
When you create a subdeliverable, many of the field values are inherited from the parent. In particular, if the parent has a checklist or is set to summarize subdeliverables, you may need to change the checklist or the options settings. Any subforms attached to the parent will also be inherited.

Move - Reorganizing the Deliverables Tree

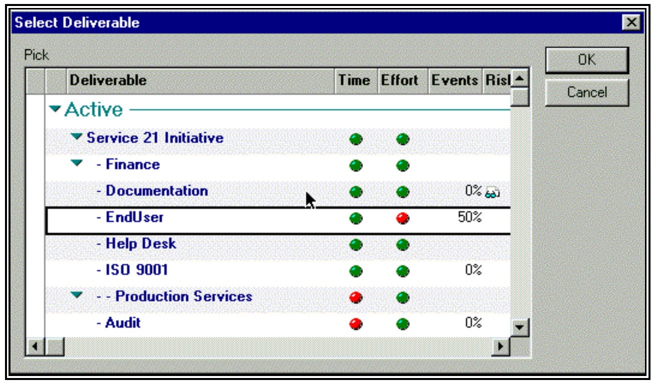
The Move action allows you to reorganize deliverables. Existing subdeliverables can be transformed into first level deliverables or relocated to be subdeliverables of new parents.

Moving Deliverables (Notes)

When you select Move a dialog is displayed offering the opportunity to make it a first level deliverable, reposition it, or to do nothing.



When New Position is selected, another dialog appears showing the existing deliverables. Select the new position.



If this position is not logical (because you are making the deliverable a child of itself), you will get a warning message, otherwise the deliverable will be renamed and repositioned in the dashboard view.

Note that the deliverable will immediately close when this action is done and that you will see the confirmation prompt "Implement Change in Position." You must OK this prompt to move the deliverable to its new position.

Moving Deliverables (Web)

1. Click on the Move action to display the Move Deliverable Action Form.
2. In the droplist will be the names of all possible new locations for the deliverable, and the additional option for changing the existing subdeliverable to become an independent first level deliverable.
3. Select and press Submit.
4. The deliverable will be redisplayed with its new name. There is no further confirmation. Note that you must have the right to modify the deliverable in order to move it.

Linking Deliverables to Projects

A deliverable's estimated end date can be linked and synchronized to project key event dates. A deliverables estimated effort can be linked and synchronized to the effort or one or more projects.

A deliverable can also be owned by a project, in which case these linking features would probably not be used.

Linking with Project Events

You can associate a deliverable with up to 10 key events which may reside in as many as 10 different repository projects.

The average of the percent complete of these events will appear in the deliverable and on the deliverable dashboard.

You may also choose to link the latest of the end dates of the events with the estimated end date of the deliverable. When this is done, changes in the linked project schedules will be automatically reflected in the estimated finish of the deliverable which may in turn trigger notifications to the owner of this deliverable and its parents. Note however, if this deliverable's time indicator goes red as a result of your manual manipulation of the event list, no email will be sent.

When this linkage is enabled, a message will appear to the right of the estimated completion date showing the name of the linked event that is driving the schedule.

If more than one key event is in the list, the linked date will be the date of the key event whose scheduled or actual finish date is the latest of the set. This means that the effective link may change as key events are rescheduled.

You may add, remove and change these event linkages at any time.

Creating Event Links using a Notes Client:

1. Open the deliverable document for editing.
2. Click on "Associate Key Event".

This will display an dialog form allowing you to add new events, remove existing events and to link or unlink them from the estimated end date of the deliverable. Select the action desired and OK.

To Add an Event:

Select the Add Event action and press OK.

A second form is displayed. Select the Project from the list and Press OK.

A third form is displayed which shows existing events and a list of those available for this project. Select the event to be associated and press OK.

Note that changes to the list of events will not appear until you have closed, saved and reopened the deliverable document.

Creating Event Links using a Web Browser

1. Display the deliverable document.
2. Click on the words "Key Events" which are located in the upper left corner of a table below the Checklists and Projects tables.

This will display the ***Associate Key Events with Deliverables*** form.

The selector on this form will allow you to add new events, remove an existing event and to link or unlink events from the estimated end date of the deliverable. Select the action desired and Submit.

If you select Add Event to List the ***Add Key Event To Deliverable*** form will appear. Select the project owning the event you want to add and press Submit.

The ***Add Key Event To Deliverable*** form will reappear with an event selection for the previously selected project. Select the event and press Continue.

The deliverable will be redisplayed. You will see that the Key Events table has been updated with the list of events and the status of those events.

If you have linked the events to the deliverable, a message appears to the right of the estimated finish date of the deliverable identifying the linked event.

Linking Project Effort

You can associate up to 10 projects with a deliverable. This simply creates a list of projects.

Optionally, you can link the sum of the total effort (actual+workremaining) of the projects to the estimated effort at completion field of the deliverable.

Once linked, if the project effort changes, the deliverable effort will be updated. This in turn can cause a change in the status of this deliverable and its parents on the dashboard.

Linking Project Effort using a Notes Client

Open the deliverable document for Editing.

Click the Associate Project action.

This will display the "Associate Projects with Deliverable" dialog box.

Select up to 10 projects.

Select one of the three options at the bottom of the form "Update Project List", "No Action", or "Update Project List and Link Sum or Project Hours to Estimated At Completion."

Click OK.

Note that changes to the list of projects will not appear until you have closed, saved and reopened the deliverable document.

Linking Project Effort using a Web Browser

Click on the work "Projects" that appears on the left side of the table located just below the checklist area.

This will display the Associate Projects with Deliverable form.

On this form you may select up to 10 projects.

At the end of the form select either "Update Project List..." or "Update Project List and Link Sum of Project Hours to Estimated at Completion..." Select and Submit.

The deliverable will be redisplayed. You will see that the Projects table has been updated with the list of projects.

If you have linked the project effort to the deliverable, a message appears to the right of the Estimated Effort at Completion field.

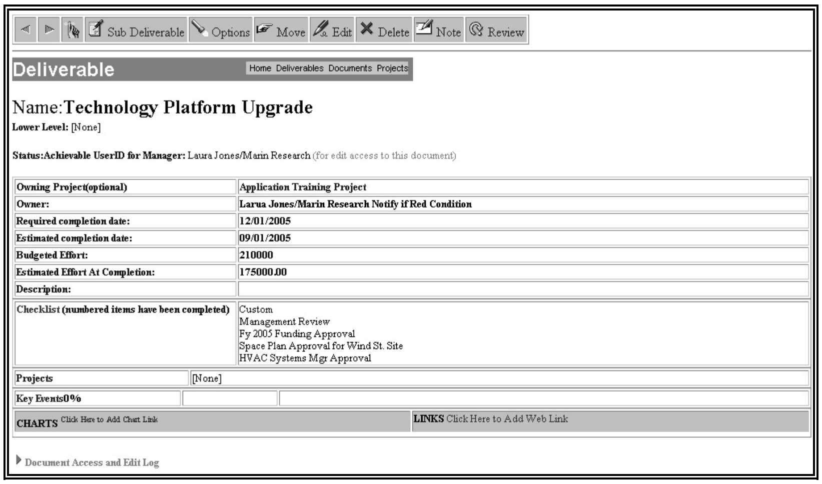
Linking Charts and Web pages to Deliverables

The web deliverable form provides a table for chart and web links that is very similar to those found in project profiles.

This allows you to use the deliverable document as a locus for related information from everywhere in your organization as well as charts for the linked projects.

Checklists on Deliverables

A checklist can be used to provide a simple, understandable way to track the progress of a deliverable. It is not dependent upon the existence of a project plan or specific tasks. Any deliverable can have a checklist, and the checklist can be customized for that specific deliverable or a standard checklist can be used unmodified.



Custom Checklist in deliverable as seen in web browser. None of the items have been checked as yet.

As the deliverable is worked on, the owner should update the checklist section of the form. The dashboard shows the ratio of completed to total steps as a metric of relative progress and shows the name of the first uncompleted step (if any remain).

So you can think of a checklist as a mini-tasklist that is used in lieu of a project plan, or a top level "phase review" for a major deliverable whose situation may not be easily understood from the details of associated projects.

Creating deliverables with checklists provides a very simple way to get project management underway in an organization.

Assigning a checklist to a deliverable

Notes Client:

1. Open the deliverable into Edit Mode.
2. Click the "Checklist" action on the top of the form.

3. Select the standard checklist name, or select Custom the press OK.
4. If you selected "Custom" then a Custom Checklist dialog box appears. Fill in the items and press OK.
5. The new project checklist will appear.
6. Close and save the deliverable to keep the changes.

Web Browser

1. Open the deliverable for display.
2. Click the word "Checklist" in the upper left corner of the Checklist panel which is located just below the statistics area.
3. A "Checklist Selection" page will appear.
4. Select the standard checklist name, or select Custom the press Submit.
5. If you selected "Custom" then a Custom Checklist page appears. Fill in the items and press submit.
6. The deliverable will be redisplayed with the new project checklist..

Customizing Standard Checklists

To customize a predefined checklist, first assign it to the deliverable, then press the Checklist button link again and select Custom. This will display the original checklist and allow you to edit each row before saving it.

Checking off steps

You must be in edit mode to mark steps complete. Simply click on the checkbox to set or unset the checkmark.

When you are in read mode and are using a Web client, checked items will be shown with a leading number whereas unchecked items will not have a leading number. The actual checkboxes show only when you edit the deliverable document.

In Notes, the checkbox symbols are visible at all times, but you must enter edit mode to change them.

Dashboard Display of Checklists

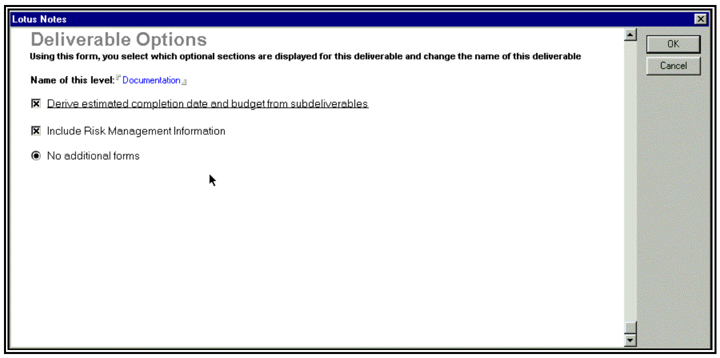
Two columns of the deliverables dashboard are used to report on checklists. The first column shows the number of checklist items completed followed by the total number of items defined (e.g., 2/6).

The second column shows the first word or words of the first item in the list that has not been completed. So if you define a checklist with 6 steps and check off the first two, the third step will show on the dashboard. But if you checked off the first and fourth steps, the dashboard will still show 2/6 but the title of step 2 will be shown because it is the first uncompleted step.

Deliverable Options

The Options function allows you do four important things.

1. To change the name of the deliverable.
2. To link the deliverables effort and completion date to its subdeliverables.
3. To display or hide the Risk management section of the deliverable.
4. To add or remove a supporting information subform to the deliverable. This allows custom variations of the deliverable form to be created.



Notes Clients may set options by entering edit mode and pressing the Options button. Select the desired settings and press OK. If you change subforms, a message will appear telling you that you must close and reopen the deliverable to see the change.

Web Clients will see the Options action displayed when reading the deliverable. Selecting this link will display the Deliverable Options Form. Enter the desired settings and submit. The Deliverable will be redisplayed with the changed implemented.

Changing the Deliverable Name

On the options form you can change the deliverable name or the name of this level. If the deliverable has subdeliverables, the names used in the subdeliverables will not be updated until an agent runs. As a result, hyperlinks between levels may be inoperative for some time. Any level, however, can always be reached from the dashboard.

Summarizing Subdeliverables

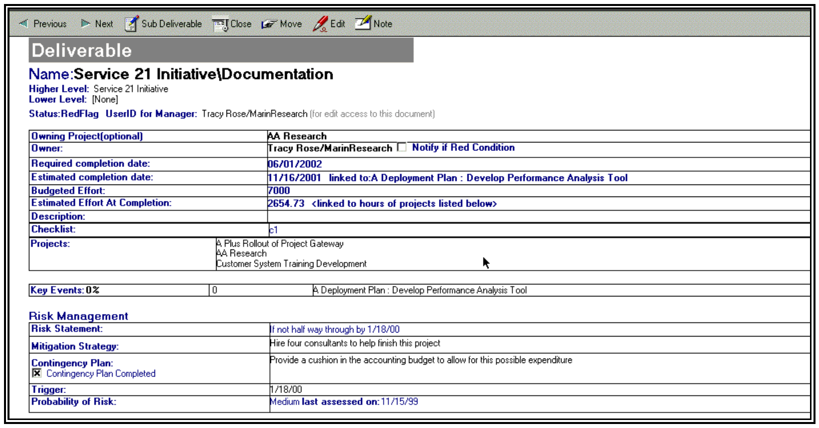
By setting this option, you tell the system to set the estimated completion date of this deliverable to be the latest estimated completion date of any of its subdeliverables. You also set the estimated effort at completion to be the sum of the estimated effort at completion of all the subdeliverables.

This is a very important feature for the top levels of your tree, but it should only be used when all of the lower levels have been specified and estimated. Until that time, it is better to simply provide manual estimates at the top of the tree.

Summarization is implemented using a background agent. As a result, changes made at lower levels will not be reflected in the summarized levels until the next time that the agent runs.

Risk Management

The central concept of risk management is that organizations respond better to problems that they anticipate than those which come as a surprise.



Of course all deliverables have some uncertainty. But "worries" are not the purpose of this section. Rather, this section is to be used when you have a well defined potential problem that may have major impact to the schedule or budget but which may not occur. (If you know the problem will occur, you should build it into the estimated completion date or estimated effort.)

When you select "Risk" you add the following items to the deliverable form:

1. A statement of the risk that is foreseen:

2. A list of actions you are going to take to prevent the risk that you have identified from actually happening. This is called a Mitigation Strategy.

3. A plan for dealing with the risk if it does happen - This is your "Contingency Plan"

4. A condition - called a trigger - that anyone can use to determine whether the contingency plan needs to be implemented

5. An assessment of the risk (how likely is it to happen) and a date at which this assessment was made.

The most important part of this section is the first part - the recognition of the existence of a specific risk and its consequences.   The other key part is the contingency plan. The effort in defining what this should be usually gives you a better handle on how to avoid the risk and helps others understand what will happen if the anticipated problem arises.

Including Custom Subforms

Sometimes the best way to fully define a deliverable is with a set of specific questions. Project Gateway does not provide any standard subforms, but you can customize the system to provide them. When you have done that, the names of the subforms will appear in the options dialog. Due to the way Notes works, when you change the subform selection you must close, save, and reopen the deliverable before the subform appears in the document. A prompt is generated to remind you of this.

For information on creating custom deliverables subforms, please contact Marin Research.

Automated Deliverables Maintenance

Once a deliverable has been linked to project milestones or budgets, it is possible that the linked items might be removed. When this occurs system will modify the deliverable to visually indicate any such removed items. If "Notify on Red Condition" is enabled, it automatically will email the deliverable owner a message when a linked item is removed or becomes obsolete.

Project Name Changes for Deliverables

When project names are changed, the corresponding changes are made in all the deliverables that reference them. The project names in the list of projects and in the owning project field will be updated immediately. The project and task names used in the key events links will be updated by the Maintain Dashboards process which normally runs nightly.