



Project Remedies Inc.

Why ActionProgram Manager Plus!

Bridging the Gap
Between Operations and
Application Development

A White Paper from Project Remedies Inc.

January 23, 2012



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Abstract

If you are going to license a project portfolio management system, license one that interfaces with your existing Remedy applications out of the box, like Project Remedies' ActionProgram Manager Plus. It helps you bridge the gap between Application Development and Operations, between the BMC Remedy IT Service Management Suite and Project Portfolio Management. It makes everything easier, better, and less expensive.

Executive Summary

If you are going to license a project portfolio management system, why not license one that is integrated with your existing Remedy-based applications out-of-the-box, Project Remedies Inc.'s ActionProgram Manager Plus (APM Plus)? Everything becomes easier, better and less expensive.

APM Plus includes project portfolio management system functionality as well as process, resource, governance and cost management functionality. It has been called a "process engine within Remedy." No other Remedy Action Request System-based application has this functionality.

APM Plus helps you:

- Get the metrics you need to run your business, to control and lower cost.
 - Simplified timesheet reporting. Only time and expense tracking system that does time and expense tracking against all requests: incidents, problems, changes, project tasks and "other tasks" not related to requests.
 - Include asset cost so you have total cost of ownership in one system. Only project portfolio management system that interfaces with an asset management system.
 - Manage more types of projects in the same system.
 - Connect project management functionality to the Service Catalog, and other Remedy applications like Change Management and Asset / Configuration Management
 - Better management visibility and control. Easier for you to answer questions.
 - Better cost control. Metrics. Know the cost of each request. Know what you are doing for each business unit.
 - Supports ITIL.
 - Supports CobiT.
 - Supports your basic business drivers.
- Create a "Culture of Accountability" and a "No-Surprises" Environment.
 - How do you create a "Culture of Accountability"?
 - Have your managers create project plans and assign people to tasks.



- Then, have your managers' lead weekly meeting where the tasks due last week and the tasks due this week are discussed. If they are not done, they should ask why.
- Let your managers know that this is a permissions-based system and you have the ability to look at any project at any time without them knowing about it. You want them to send you the normal reports that they send (APM Plus has very good reports), but they should understand that you can look at the detail at any time.
- Bring IT together as one organization.
 - Manage more types of projects. Application Development and Operations projects. Cyber, bug reporting, release management, and more.
 - Better communication and coordination between Application Development and Operations improves efficiency and lowers cost.
 - Optimize resources. Lower cost.
- Have a more effective Change Management strategy.
 - More effective and consistent work processes improves credibility, efficiency and lowers cost.
 - Quantify the cost of each process. As processes change, know if the new process is more cost effective than the old process. Improves efficiency and lowers cost.
 - Cross-organization and cross-application processes like Bug Reporting become trivial to implement. More efficient operations. Better communications and coordination, and lower cost.
 - Reduce confusion between what is a change and what is a project that feeds into a change. Get the right product for each function. Change Management for Changes and APM Plus for projects that feed into changes. Improves communication and coordination. Improves success rate and lowers cost.
- Manage the whole project life-cycle in one product.
 - Increases visibility and make more effective investment decisions.
 - Breaking the Strategic Plan into Manageable Chunks and Going through the Whole Project Life-Cycle, Insuring that Each Project Supports the Strategic Plan.
 - Make the Project Manager's Job Easier.
- Lower License Fees as Well as Support, Hardware and Software Costs.
 - Reduce the number of products and vendors you have to deal with.
 - Eliminates the need for the major integration project. Saves time, improves success rate, reduces cost and improves visibility.



I. Get the Metrics You Need to Run Your Business, to Control and Lower Cost. Bring IT Together as One Organization.

1A. Better Management Control and Visibility. Easier to Answer Questions.

- Many companies and government organization think of the BMC Remedy IT Service Management suite as a set of applications for Operations and a separate project management system as a tool for Application Development. Using APM Plus, which was developed with the Remedy Action Request System like the applications that make up the ITSM suite, helps remove this artificial divide, bringing the organization together.
- Have a consistent way of reviewing all projects / investments, and well as incidents, problems and changes.
 - Eliminate “death by PowerPoint.”
 - A request can go from an incident to a problem to a change and to part of a project in a day, and back down this path the next day. It is a lot easier if one system is being used.
- Metrics. Because all of the data (incidents, problems, changes and projects) are in one system, it is easier to get data and see trends. Easier to answer questions because all of the data is in one system. What is everyone working on? The tasks we want them working on? How much time was spent on each task and for project tasks? How long was each task supposed to take and how long did it take? How much time was supposed to be spent on a task and how much time was spent on a project task?
- Include asset cost in reports as well. APM Plus is the only true project portfolio management system that interfaces with an asset management system. Asset cost of ownership is more accurate because work performed on project tasks can be charged against asset.
- See trends for different types of projects
 - Track the 5 times in the project life-cycle where cost comes in.
- Management notified automatically when critical thresholds are passed.
- See where a project is at any time along the complete project life-cycle. This is easy to do in APM Plus.
 - Helps you get what you thought you were going to get.
 - APM Plus is a “permissions-based” system so management can have permission to see all projects, while specific people can only see the projects they are supposed to see.
 - When project people know that management can look into what they are doing at any time, it supports a “culture of accountability” and a “no-surprises” environment.
- Reduce the project failure rate.



1.2. Better Cost Control. Know the Cost of Each Request. What IT is Doing for Each Business Unit.

- APM Plus can manage the whole project life-cycle. Insures that both Application Development and Operations projects align with the Strategic Plan.
- Since APM Plus can be connected to the Service Catalog and its time tracking functionality can be used on all Remedy tasks, all cost data comes together in the same system. You can see the cost of each request, and then summarize that by the requestor's business unit. This tells you what IT has done for each business unit.
- When using a separate application for project management and time tracking, inevitably you come to the issue of tracking time against Remedy tasks. With APM Plus, there is no issue.
- If you do choose a separate project portfolio management system, the solution to the problem is a major integration project. (Is that redundant? Aren't they all major?) APM Plus eliminates the need for the never-ending integration project that comes when you acquire disparate products.
- PRI has written a white paper on cost control called [The World has Changed: Cutting and Controlling Cost](#). It is available on our home page: www.projectremedies.com.

1.3. Better Communication and Coordination Between Application Development and Operations. Improves Efficiency and Lowers Cost.

- Projects inevitably feed into changes. When a project is late or if it is going to finish early, it effects the change or release schedule. With APM Plus's automatic notifications, the people impacted will know automatically.
- With Release Management, as the date approaches, the question becomes, will all the enhancement requests and bug fixes be finished in time? APM Plus answers this question while Remedy Change Management doesn't.
- Work and approval processes can go across organizations.
- Implementing cross organization / cross application processes like Bug Reporting becomes trivial.

1.4. Optimized Resources. Lowers Cost.

- At a High Level. Using APM Plus answers the questions:
 - Do you have enough resources to do the projects you want to do?
 - When, where, and in what organizations will you have skills shortages and skills surpluses?
- For Specific People.
 - Management can look in one place to see what everyone (whether in Operations or Development) is working on.



- Are people working on the right tasks, the ones you want them to work on?
- Can your organization do what it does with 25% (pick the number) fewer people? The Resource Management Charts in APM Plus are unique.
- Hold people accountable. No surprises.
- If you need someone with a particular skill, if the people with that skill in one organization are swamped, is there someone in another organization that can be available?
- Find resource conflicts early enough to do something about them.
- The resources themselves can look in one place to see what they are working on.
 - Looking in one place saves time for everyone, and the dollars saved are enormous. For example, if 300 people save on average 15 minutes per day looking in one place for their to-do list, if you value their time at \$100 per hour, the savings is \$1,875,000 per year. Every year.

1.5. Simplify Timesheet Reporting. Improves Cost Control.

- Use one system for time and expense tracking against all tasks (Remedy tasks and project tasks).
- All costs (time, labor and asset) are brought together in one system. APM Plus is the only true project management system that:
 - 1) can be used for time and expense tracking against all Remedy tasks, and
 - 2) integrates with an asset management system for true total cost of ownership.
- Eliminate the need for the major integration project that comes when you license disparate products.
 - When you license MS Project Server or some other system for time tracking against application development project tasks, they cannot see Remedy tasks.
 - Did you include the time as well as the cost of the integration project in your budget?
- Faster implementation.
 - Implementing across all tasks and all organizations is faster because there is no need for the integration project.
 - APM Plus is also a lot easier to use and to customize if necessary.

1.6. Manage More Types of Projects in the Same System.

- Including those projects launched, using workflow, from the Service Catalog. ITIL.
 - Projects won't fall through the cracks. Accuracy of metrics improved.



- Customer service improved because you can predict and give the requestor an idea of when the project will be finished.
- Adding APM Plus to your existing Remedy ITSM environment is the easiest, fastest, and least expensive way to get to a Demand Management / Work Management System.
- Application Development projects.
- Operations projects.
- Cyber Remediation projects and the whole cyber remediation life-cycle.
 - With an interface with your Event Management System. APM Plus is the only project portfolio management application with this functionality.
 - Using pre-defined templates and workflow, launch project plans at network speed. This is one of the requirements the first head of the US Cyber Command said was necessary for us to win in cyberspace.
 - Perfect for Command Cyber Readiness Inspections.
- Bug Reporting projects and a better bug reporting process.
 - With an interface with incident, problem, and change management.
 - This is a closed-loop process crosses organization and application boundaries.
- Release Management.
 - With an interface with Change Management.
 - Connecting bug fixes and enhancement requests to a change request.
 - APM Plus answers the question: will each bug fix and enhancement request be done by the date the scheduled date of the release?
- Managing scheduled and unscheduled asset outages.
 - With an interface with Asset / Configuration Management.

1.7. Connect Project Management Functionality to the Service Catalog and other Remedy (AR System)-Based Applications like Change Management and Asset / Configuration Management.

- Projects won't fall through the cracks. Accuracy of metrics improved.
- Customer service improved because you can predict and give the requestor an idea of when the project will be finished.
- With time tracking against all tasks, you can know the cost of each request.
- Adding APM Plus to your existing Remedy ITSM environment is the easiest, fastest, and least expensive way to get to a Demand Management / Work Management System.

1.8. APM Plus Supports ITIL

- As Thomas Barthold, a respected ITIL and CobiT subject matter expert wrote: "Portfolio Management is all about controlling the project. This is at the heart of ITIL; design services that deliver the best value (lower TCO, efficiently delivered, that meet the business requirements). This is all Service Design



and Service Transition – Project Management.”

1.9. APM Plus Supports CobiT.

- Project Portfolio Management touches each of CobiT’s four domain processes:
 - Plan and Organize.
 - Acquire and Implement.
 - Deliver and Support.
 - Monitor and Evaluate.

1.10. APM Plus Supports Your Basic Business Drivers

- Business managers and boards demanding better returns from IT investments (i.e. IT delivers what the business needs to enhance stakeholder value).
- Concern over the generally increasing level of IT expenditure.
- The selection of service providers and the management of service outsourcing and acquisition.
- Increasingly complex IT-related risks such as network security frameworks and best practices to help monitor and improve critical IT activities to increase business value and reduce business risk.
- The need to optimize costs by following, where possible, standardized, rather than specifically developed approaches.
- The need to apply centralized governance models across a global organization to ensure compliance, meet regulatory requirements and maximize return on investments.

II. Create a “Culture of Accountability.”

2.1. Holding People Accountable.

- In order to hold people accountable, first:
 - 1) project plans (task plans) need to be created.
- Resources (people):
 - 2) need to be assigned to tasks,
 - 3) agree to perform the tasks on time and in the time each one is supposed to take,
 - 4) status the tasks and
 - 5) report how much time they spent working the tasks.
- Then, 6) at a weekly status meeting, with a workstation that has access to APM Plus and a projector connected to the workstation.
 - Each project is brought up and reviewed.
 - It is easy to do this with APM Plus. From the portfolio view, the project record is accessed with one click. All of the tasks that make up the



project are accessed with two more clicks. All of the data is current up to the last entry so there can be no excuses.

- Reports help too. Should Have Started and Should Have Finished are two of the over 25 that are included in APM Plus.
- The tasks that were supposed to be completed last week and the tasks that are scheduled to be completed this week are discussed. If something was not completed, the reasons why are discussed.
- This is how people are held accountable, and how you create a “no-surprises” environment.
- This might also be called “Creating a Plan and Working the Plan.”

III. Have a More Effective Change Management Strategy.

3.1. More Effective and Consistent Work Processes Improves Credibility, Efficiency and Lowers Cost.

- Get the right product for the right job and lower your overall cost. Change Management for changes and APM Plus for projects that feed into the changes.
- Remedy Change Management is not a project portfolio management system.
 - You don't get the metrics you need nor do you have the visibility you need. It is harder to answer questions.
 - Your people do not get the functionality they need to manage projects.
 - No resource management or time tracking functionality is included in Change Management and both are critical to creating a Culture of Accountability and a No-Surprises Environment.
 - Avoid confusion. One manager said: “We don't have 5,000 changes. We have 50 changes and 100 little projects that feed the changes.
- Using APM Plus along with Change Management:
 - Eliminates the confusion that comes with calling everything a change.
 - Reduces administration time incurred by your most senior engineers.
 - Optimizes the use of resources.
 - Improves communication and coordination between Application Development and Operations.
 - Gives you the metrics you need. Makes it easier to answer questions.
 - Not significantly more or less expensive.

3.2. Quantifying the Cost of Each Process. As Processes Change, Know if the New Process is More Cost Effective than the Old Process. Improves Efficiency and Lowers Cost.

- The only way to know if a new process is “better” than an old process is to compare one with the other, i.e. to compare how each performing organization works against the same work process. One metric to look at is cost. “Cost” is one of the metrics you need to determine who is doing it “best.”



- To do this, 2 things need to be done: prepare work templates, which define the tasks that make up each work process or template, and 2) do time tracking so you know how long it takes the people in each organization to perform the process.

Let's say that in the first 3 months after you put this into practice, 250 requests for a particular service are made, and that these requests are performed by 3 different organizations. You find out that organization 1 does task 2 on average in 1 hour. Organization 2 does task 2 on average in 3 hours. Organization 3 does task 2 on average in 6 hours. This is one of the metrics you need to determine which organization is doing it "best."

During this time, the people doing the work suggest that the process would be better if it were tweaked: some tasks should be replaced with others and the sequence should be changed. This goes back to the people (experts) who defined the process in the first place. They review the process and agree that the changes would make the process "better." They change the process in the system in minutes. Over the next 3 months, people make 250 more requests for this service. Management's question is: Is the new process "better?" does it take less time? Cost less? The only way to know is to 1) have templates and 2) do time tracking.

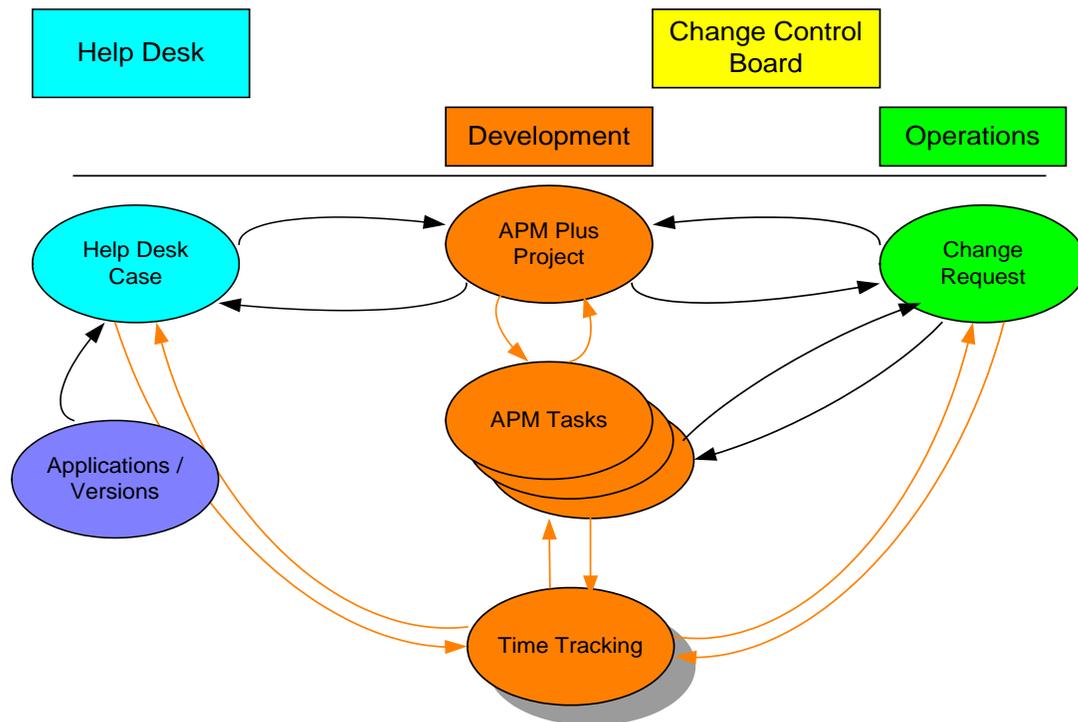
- PRI has written a white paper on this topic called [Implementing Project Oriented Customer Service](#). It is available on our home page: www.projectremedies.com.

3.3. Cross Organization / Cross Application Processes like Bug Reporting Become Trivial to Implement. Improves Efficiency and Lowers Cost.

- Bug Reporting from Users involves a cross organization / cross application process, as follows:
 - A user submits a bug report to the help desk.
 - A ticket is created and because it is categorized as a bug report, is assigned to the Change Control Board.
 - The Change Control Board asks: is this a change or a project? Let's say that it is a project.
 - The "bug fix project plan" template is used and a project plan is created and assigned to a manager in Application Development.
 - The project plan is approved and people start working the tasks.
 - The last task in the "bug fix project plan" is to implement the fix, and since that's done in Operations, when they get to that task, Remedy workflow is used to create a Change Request, and Remedy workflow is used to notify the person in Operations that there is a new Change Request.



- He or she implements the change and when they do, changes the status on the Change task to “closed.”
- When they do, automatically, workflow is used to:
 - Close the project task.
 - Since it was the last task, close the project record.
 - Since the project is closed, close the original request, and
 - Notify the submitter that the bug was fixed.
- The process can be diagrammed as follows:



3.4. Improving Your Change Management Process. Reduce Confusion About What is a Change and What is a Project that Feeds Into a Change. Using the Right Product for Each Function Improves Metrics, Improves Communication and Coordination. Change Management for Changes and APM Plus for Projects.

- Using Change Management for managing projects leads to confusion and inefficiencies. It does not give your staff the right tool for the right job and is not saving you any monies.
- One senior manager told one of her direct reports: “We don’t have 5,000 changes. We have 50 changes and 100 projects that feed the changes.”
- A better approach is to use Change Management for changes and APM Plus for projects that feed the changes.



- At one client, when a complex change was submitted, it was assigned to a senior technical manager. He would list all the tasks necessary as sub-tasks under a change. Then he would go into MS Project and create a project plan with the same tasks so he could communicate when the project would be done. As the project was worked, he would update the Remedy tasks and update the MS Project project plan to keep them in sync. He used Excel for reporting. With all of this administrative work, he could not report how busy the people were. They replaced all of this with APM Plus, got better results and saved the most senior technical staff a great deal of time. And it did not cost any more because they reduced their number of Change licenses at the same time they licensed APM Plus.

IV. Managing the Whole Project Life-Cycle in One Application.

4.1. Increase Visibility and Make More Effective Investment Decisions.

- Get what you thought you were going to get. A Senior Executive at the US Army CIO/G6 office said to me: “Let me tell you what the problem is.
- Someone comes to us and says: “if you approve this amount of money, in two years, I can deliver a Viennese stallion.” We look at each other and say: We don’t have a Viennese stallion and it would be great if we did.” So we approve the budget and this person goes away.
- He comes back in 2 years, and says: “We have completed 3 or the 4 legs of the camel, and if you give us a bit more money, we can complete the 4th leg.
- We look at each other and look at him and say: “A camel? We already have a camel. We thought you were going to deliver a Viennese stallion.” He says: “Viennese stallion? Where did you get that idea.”
- And the Senior Executive said: “The money is gone, the time is gone, and all confidence is gone. And it was our fault because we weren’t paying attention.”
- With APM Plus managing the whole project life-cycle, and because it is a permissions-based system, you can pay attention and even go back to the original definition and see that it says: Viennese stallion. The complete life-cycle is outlined in the next section of this paper.

4.2. Breaking the Strategic Plan into Manageable Chunks and Going through the Whole Project Life-Cycle, Insuring that Each Project Supports the Strategic Plan.

- Create a set of goals that represent the parts of the Strategic Plan related to IT.
- Create a set of questions that, when answered, will tell you how closely each project fits with your goals. Name one person who, during the governance (approval) process, will validate the answer to each question. Please see figure 10 on page 23, which is a screen shot showing how a question is entered into APM Plus.



- During the Proposed Project process, each project is defined. Part of the definition process is to answer these questions. If the project fits very well, it is worth 10 points. If there is a so-so fit, it is worth 5 points. If there is no fit, it is worth zero points. Please see figure 9 on page 22, which is a screen shot showing how a question is answered in APM Plus.
- Once a project has been defined, there is a 3-gate approval process built-into APM Plus:
 - 1. The Manager of the Department that defined the project approves it.
 - 2. Then there can be a whole gaggle of approvals, including a review by the person named to be the "validator" of each answer to the Priority Questions.
 - 3. Then the Steering Committee approves it tentatively for a certain dollar amount, and tells the project manager assigned to this project to now create a project plan in APM Plus to show us how you are going to spend the money, and then we will go through a 2nd approval process.
 - 4. The project manager creates the project plan in APM Plus and it goes through a 2nd (shorter) approval process.
 - 5. The Steering Committee reviews the project plan, and if it is still a good idea to proceed, gives final approval for the project to succeed. They instruct the project manager, now we want you to manage the project in APM Plus and send us the normal reports that you normally send us but be aware that we can look at your project at any time and you won't know when we are looking. That way, you won't be surprised if the end product of the project changes or the budgets are exceeded or anything. No surprises. Holding people accountable.
 - 6. The project is managing in APM Plus.
 - 7. When completed, lessons learned are reviewed and stored in the Project record. Any work templates and approval templates used during the project are updated based on the lessons learned.
- This is the same process that the US Department of Defense says is the right way to do IT Project Portfolio Management. Please see DoD Directive 8115.01 and Instruction 8115.02. They say that there are 4 phases: Analysis. Selection. Control. Review.
- Cost comes into this process at 5 points. They are brought together in one place, and included in one of the management reports. Ask to see this during a demonstration.

4.3. Making the Project Manager's Job Easier.

- Distributed approach so the people working the tasks status the task, enter comments, and enter their time against the task.
- Automatic notifications save the project manager time. Notifications are automatically logged into the appropriate task or project record.



- APM Plus has been called a “process engine in Remedy.” Pre-defined work processes (templates) can be used to create preliminary project plans for those types of repetitive projects that make up 90% of the projects worked in IT. This saves the project manager a great deal of time, because each project plan does not have to be defined from scratch.

V. Lower License Fees as Well as Support, Hardware and Software Costs.

V.1. Reduce the Number of Products and Vendors.

- For about the same monies, you could have the right tool and get the right metrics. The overall cost is less because 1) you need fewer Change Management licenses, and 2) the need for another project portfolio management system like MS Project Server is eliminated.

V.2. Eliminate the Need for the Major Integration Project.

- For about the same monies, you could have the right tool and get the right metrics. The overall cost is less because 1) you need fewer Change Management licenses, and 2) the need for another project portfolio management system like MS Project Server is eliminated.
- The same team that manages your existing Remedy applications will support APM Plus.
- APM Plus runs on the same environment as your existing Remedy applications, so you don't need to acquire more hardware and software.



II. Diagrams. Sample Charts and Report.

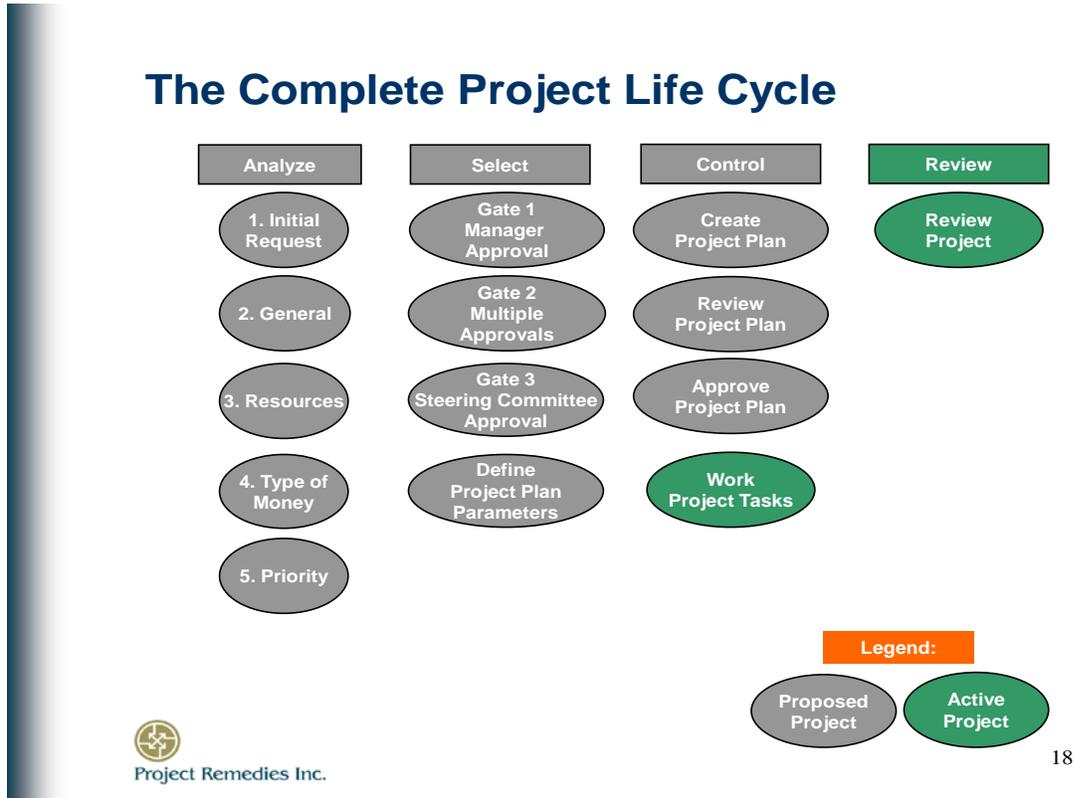


Figure 1 - The Complete Project Life-Cycle.

APM Plus is designed for Enterprise-wide use, which means that it is easier to use than most of the major systems in this niche. It's not just a tool to create project plans, but can be used for managing the entire project life-cycle (above). A narrative taking you through this process is found in Section 4.2 above, starting on page 14.

The US Department of Defense Directive on IT Portfolio Management (DoD Directive 8115.01 and Instruction 8115.02) describes a 4-phase life-cycle which lines up exactly with the life-cycle incorporated into APM Plus. The phases are:

- Analyze.
- Select.
- Control.
- Review.

The DoD documents are available on the www.projectremedies.com web site or can be found easily with Google.



Resource Management Charts:

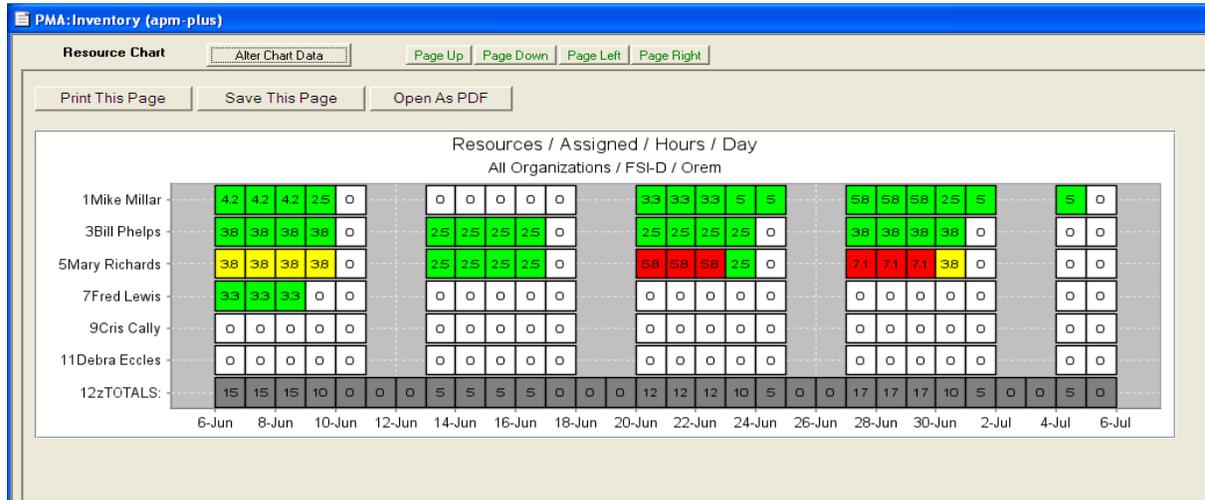


Figure 2 - A Resource Management chart showing how busy Developers in Orem are.

This is a screen shot of the detailed Resource Management chart. It is the result of assigning people to tasks in a project plan. You can't do this without first creating a project plan and calculating the dates for each task. Like any true project management system, APM Plus calculates 10 dates for each task and keeps track of 6 dates for each project.

It is a robust capability. For example, if the project slips or something happens so that the dates when a task is supposed to occur changes (and recalculated by the system), the assignments on this chart are automatically moved one way or the other. If you are not using critical path method date calculations, you cannot do this.

This is one reason to use APM Plus for projects rather than the Remedy Change Management system. Change Management does not include the ability to calculate or recalculate when the task is supposed to be worked. Since you don't know when the task is supposed to occur, when you assign people to the task, you don't know how busy they are.

Take a look at this chart. If this was real data, do you know what it would show? These people are not very busy. Two of them have no work assigned to them and the rest or almost no work assigned to them. In these tight budget times, if you ask your managers, can your people do what they do with 25% fewer people, this manager would say, my team can do it with 50% fewer people. By the way, without this chart, how would a manager know? Without this chart, they are guessing.

The other side of this is if you are defending your budget to your management. If you had our Resource Management chart but it was all red (i.e. everyone is more than 100% busy), you could explain why you needed more people rather than fewer.

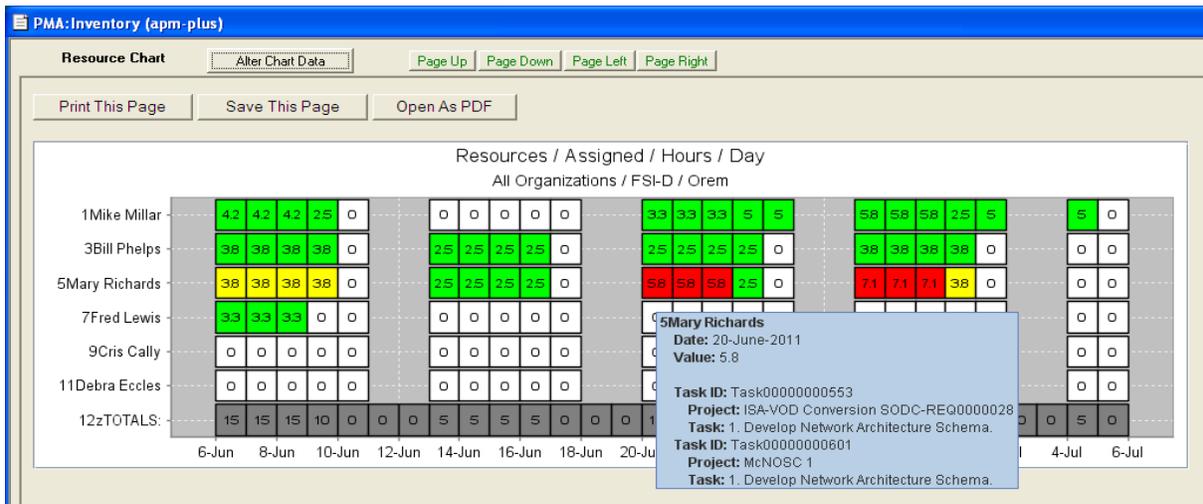


Figure 3 - This example shows the projects and tasks that Mary is working on June 20th.

When you put your cursor on a cell, you can see which project / tasks make up those hours. As you can see, a person can be assigned tasks from different projects. This is important in many different circumstances. One is if your manager calls and wants to assign someone to a different project, you can see what you are taking them off of.

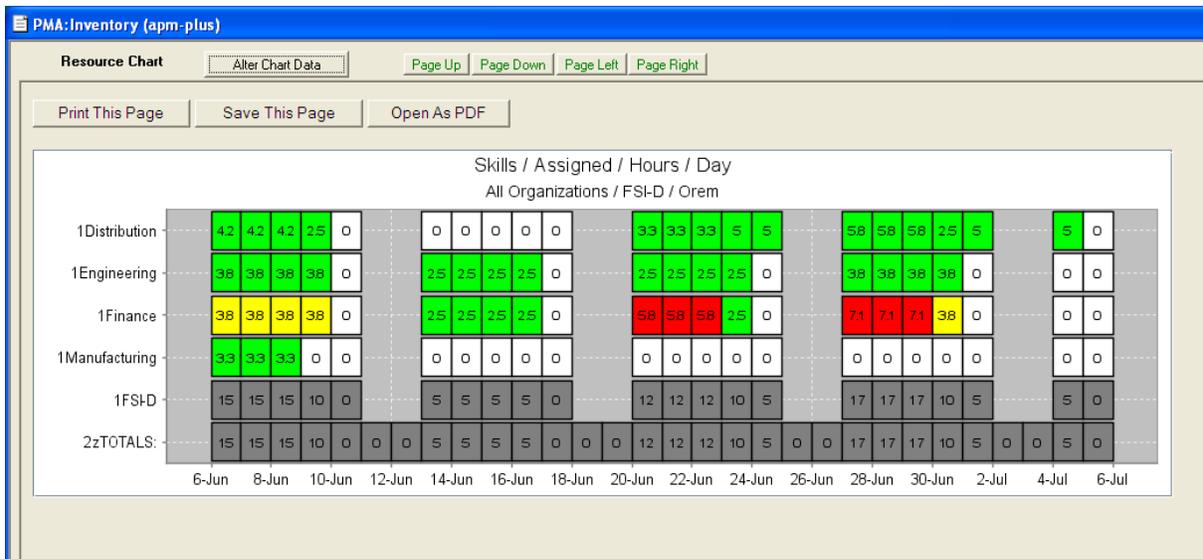


Figure 4 –This example shows how busy people are by Organization within Skill.

The data can be sorted Organization within Skill. This helps you see if one organization is really swamped while another is not very busy at all. Instead of bringing in a consultant, you might want someone from that organization can help the organization that is swamped.

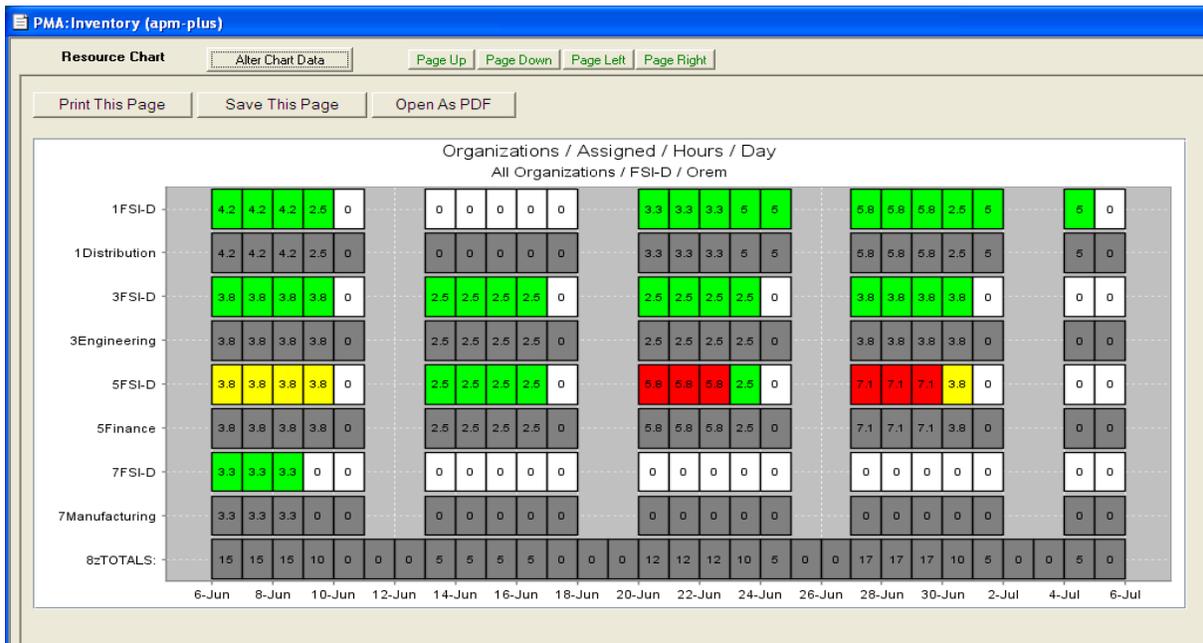


Figure 5 –This example shows how busy people are by Organization within Skill.

This data can also be sorted Skill within Organization. This shows you if the organization needs all of the skills that they have. People with a certain skill might be moved to another organization that is overbooked for people with that skill.

There are actually 36 different ways to sort and display the data on each chart.



Gantt charts and Multi-Project Gantt charts.

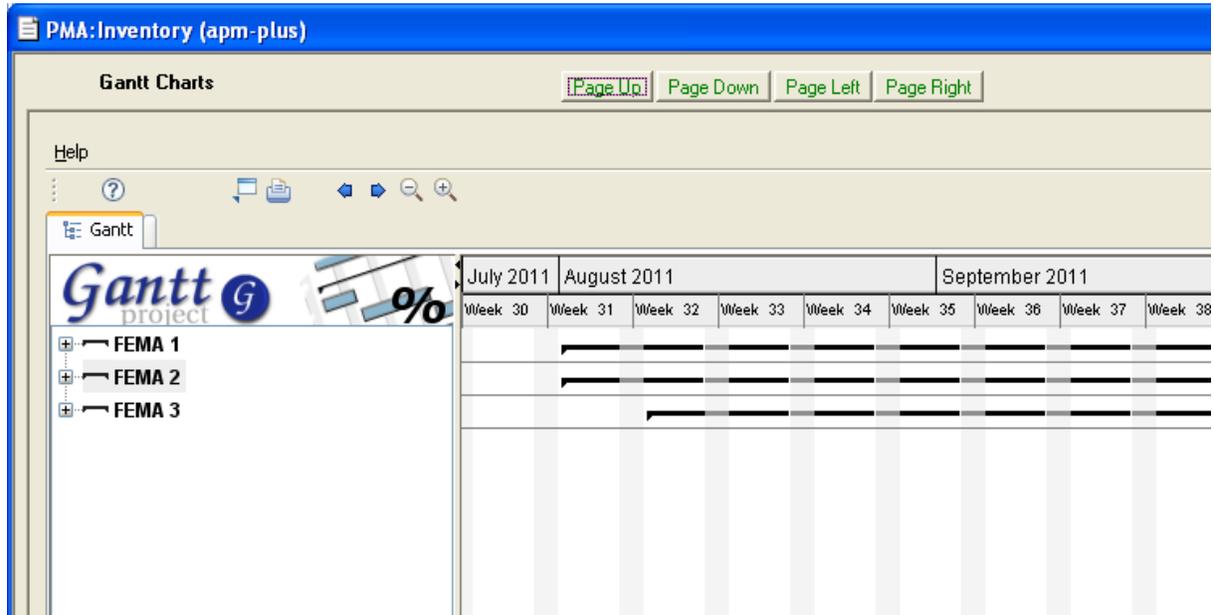


Figure 6 –A Gantt chart for a Pool.

Projects can be grouped in different ways so you can see conflicts. Here two similar projects are scheduled to start at the same time and a third a week later. Do you have the resources to do them all or does one or more have to slip? What if you get a fourth project? APM Plus helps you see and plan for conflicts.

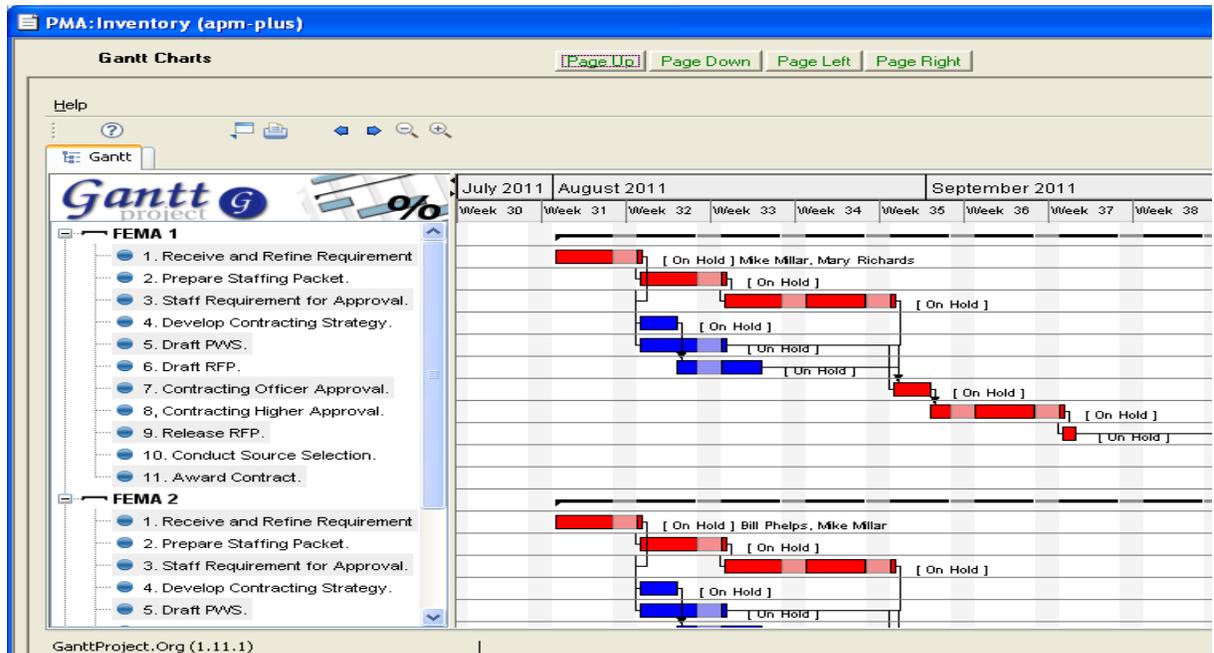


Figure 7 –A Gantt chart for a Pool, with the project plans expanded.



The Universal Timesheet.

Time & Expense Tracking (New)

Time & Expense Sheet for:

Project ID	Task ID	SUN	MON	TUE	WED	THU	FRI	SAT
Admin0000000002		0.00	0.00	0.00	0.00	0.00	0.00	0.00
Admin0000000003		0.00	0.00	0.00	0.00	0.00	0.00	0.00
HD000000000060		0.00	2.00	0.00	0.00	0.00	0.00	0.00
Proj00000000526	Task00000006735	0.00	0.00	0.00	0.00	0.00	0.00	0.00
Proj00000000550	Task00000007090	0.00	9.50	8.00	0.00	0.00	0.00	0.00

Task Name	SUN	MON	TUE	WED	THU	FRI	SAT
Sub task 1	Reg: 3.00, OT: 0.00	Reg: 9.50, OT: 0.00	Reg: 8.00, OT: 0.00	Reg: 0.00, OT: 0.00			
Task ID	3.00	9.50	8.00	0.00	0.00	0.00	0.00
Task00000007090							

Total Hrs Per Day	SUN	MON	TUE	WED	THU	FRI	SAT
	0.00	11.50	8.00	0.00	0.00	0.00	0.00

Total Hours for the Week: 19.50

Figure 8 – The Universal Timesheet.

With APM Plus, time can be entered in the task or in the Universal Timesheet. As you can see, this person can charge time against Admin tasks, HD tasks, and Project tasks. With APM Plus, people can enter their time in any task (incidents, problems, changes, project tasks or admin tasks, i.e. tasks that are not related to a request). This is set up during the implementation and literally takes minutes.

One of the major problems with MS Project Server or any other project portfolio management system is that they do not integrate with Remedy out of the box. For example, frequently, application developers are L2 or L3 people on help desk calls about the applications that work on. Since ITIL says that you should know the total cost of an application including the support cost, if they are using MS Project Server for time entry, how do you include the time also spent on these Incidents or Problems or Changes? With APM Plus, this is not an issue.



Project Scoring. Questions that Equate to Strategic Goals.

PMA:Prioritization Dialog (apm-plus)

Prioritization Question Scoring and Justification

Question	Score
How closely does this project align with the organizations defined Strategy?	10
How effectively does this project help the organization achieve its goals?	5
How well does this project fit within the budget of the organization?	10

Prioritization Question
How closely does this project align with the organizations defined Strategy?

No Fit to the Question
 Some Fit to the Question
 Close Fit to the Question

<i>Score</i>	<i>Total Score</i>
10	25

Prioritization Answer Justification

There is a really good fit because

Submit/Modify **Close**

Figure 9 – Answering questions on the PMA:Proposed Project form.

During the proposed project process, one important step is to determine how closely a particular project fits with the Strategic Plan. The idea is to quantify this, and then sort on the number so you get a list, from most closely fit to least closely fit.

If you are reviewing budgets to determine this year’s budget, you might want to re-evaluate your existing projects if the Strategic Plan has changed. Another consideration is decided to continue working a project is where it is based on schedule and dollars spent. Is it a very high priority project, almost finished and under budget? Or is it a low priority project that is not near completion? Or is it somewhere in the middle?



Project Scoring. Entering Questions into APM Plus.

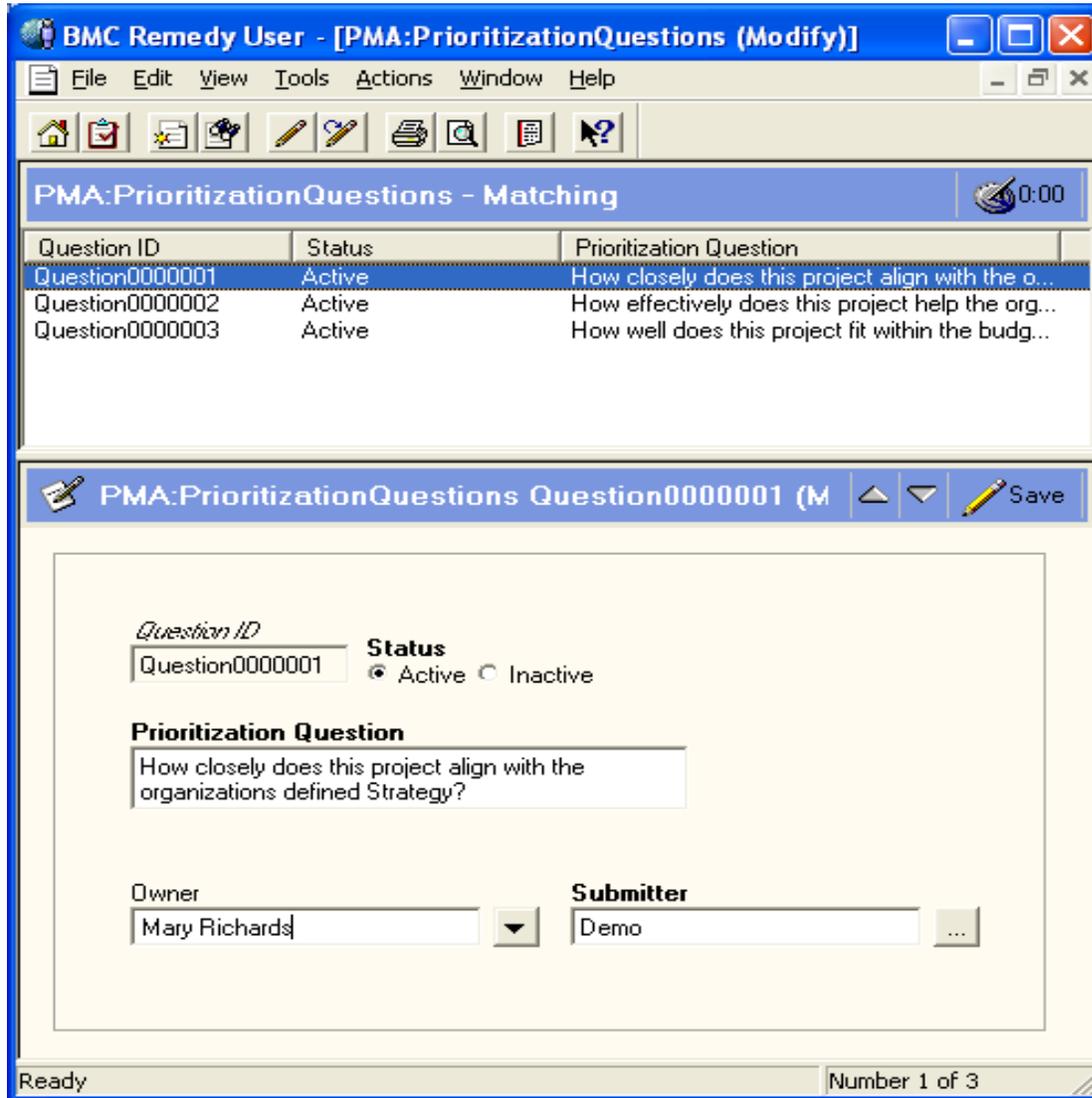


Figure 10 – Entering questions for determining a priority score into APM Plus.

This is the form used to enter questions into APM Plus. The “owner” is the person that will review the score on each project during the approval process.

This is one of 3 ways projects can be scored in APM Plus. You can group projects as A, B, or C, and then sequence them within each category. You can also use the OMB-suggested method for quantifying priority.



Reports. Total Hours by Request Type.

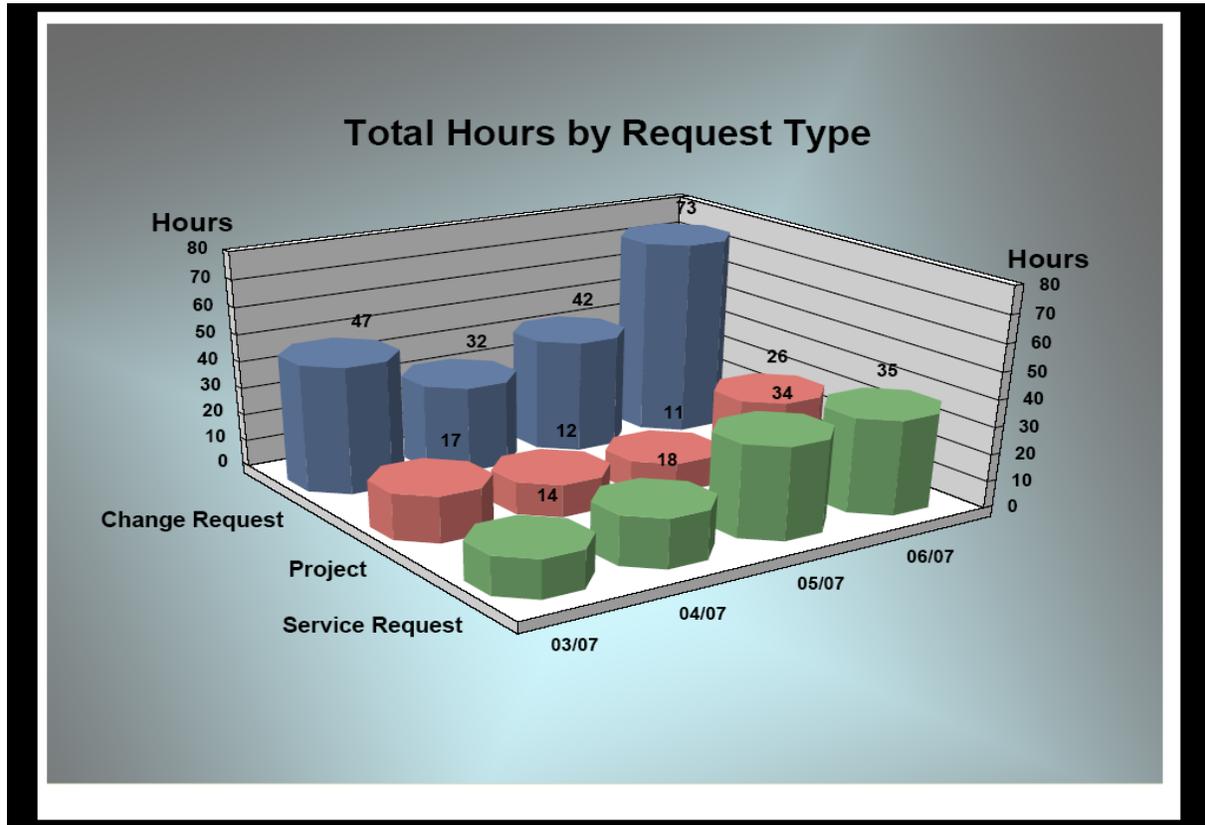


Figure 11 – Example of Trending Report, based on different types of data.

This is a unique report because it combines service requests, changes and projects. It is easy to do with all of the data in the same Remedy database tables. It shows the hours spent by category last month, and the previous 3 months so you can see trends. It would be easy to break this down further by Customer / Business Unit so you can see how much work IT is doing for each Customer / Business Unit.

How do you do this with MS Project Server or any other project portfolio management system?



The Snapshot.

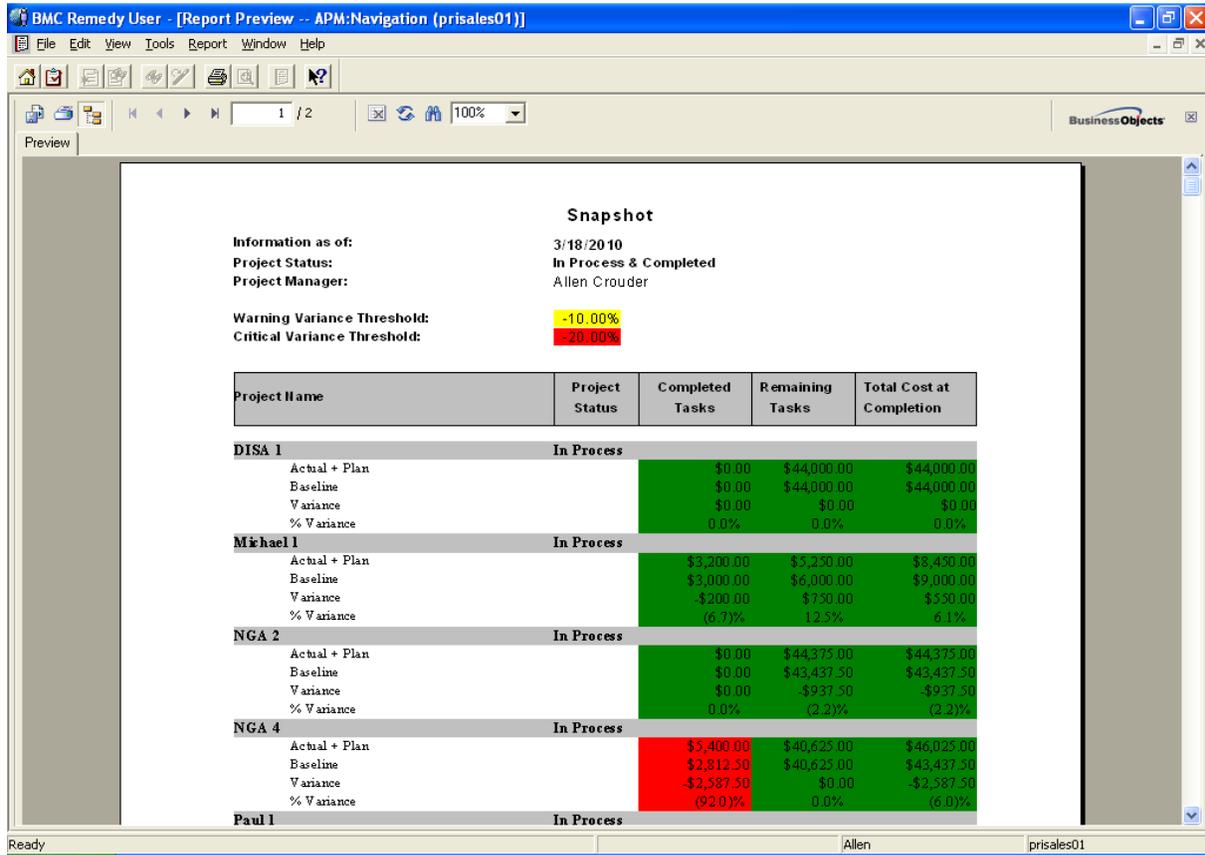


Figure 12 –Snapshot Report by Manager - sample report.

This is an important report because it shows you the status of each project In Process or Completed. It is an expansion of an Earned Value Management report made easy in APM Plus.



The Project Details Report and Creating a Culture of Accountability.

Report Preview - APM:Tasks [fshqmk12]

1 of 1 | 120% | Total:4 | 100% | 4 of 4

Project Details Report

Information as of: 5/31/01
 Project Id: Proj00000000007
 Project Name: Jim 1
 Project Manager: Allen Crouder
 Project Status: In Process
 Project Time Unit: Days
 Project Schedule Orientation: Project Start Date

Group Association	Responsible Party	Task Name	Task Status	Critical Path	Slack	Predecessor	Planned Labor Hours	Actual Labor Hours	Plan Start Date Plan Finish Date	Duration Time Units	Actual Start Date Actual Finish Date	Planned Cost	Actual Cost	
Programmer Analysts	Mary Richards	Escute Engineering Checklist	Complete	Y	0.00		10.00	12.00	5/24/01 8:00:00AM 5/25/01 5:00:00PM	2.00 D	5/23/01 6:20:47AM 5/25/01 6:22:39AM	3,300.00	3,600.00	
Programmer Analysts	Mary Richards	Escute Implementation Checklist	Assigned	Y	0.00		10.00	0.00	5/28/01 8:00:00AM 5/30/01 5:00:00PM	3.00 D		3,300.00	0.00	
Programmer Analysts	Mary Richards	Move to Operations Approval	Hold	N	0.00				5/30/01 5:00:00PM 5/30/01 5:00:00PM	0.00 D				
Programmer Analysts	Mary Richards	Escute Operations Checklist	Hold	Y	0.00		10.00	0.00	5/31/01 8:00:00AM 6/6/01 5:00:00PM	5.00 D		3,300.00	0.00	
Total for User							30.00	12.00				10,300.00	3,600.00	
Project Totals:							30.00	12.00					10,500.00	3,600.00

Figure 13 –Project Details Report - sample report.

For each project, this tells you the Planned Labor Hours vs. the Actual Labor Hours spent on a task, as well as when each task was supposed to be worked as compared to when it was worked.

If you want to know where a project is and why, this report will pinpoint where the problem started. Creating a Culture of Accountability involves management asking “what happened?” and “how come?”



The Project Summary

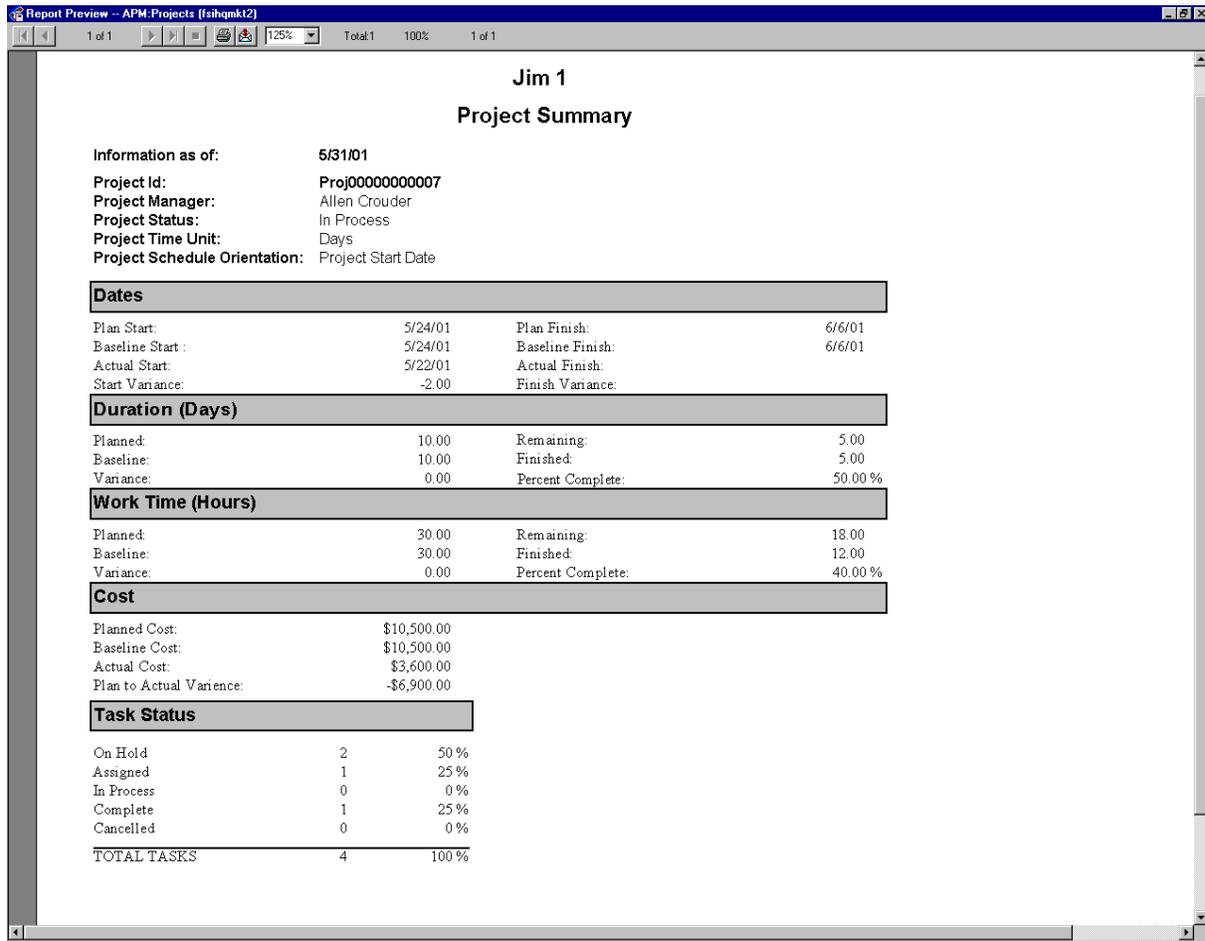


Figure 14 –Project Details Report - sample report.

The Project Summary gives you a quick overview of the project. When was it supposed to start as compared to when did it start.

What was the planned duration? How far into it are we?

What were the planned labor hours? How much has been spent?

What about the budget vs. how much has been spent?

How many tasks are at each status?

If everything is linear (and we know it's not), if you are 50% through the duration and only spent 40% of the work hours and only 25% of the tasks are complete, the project might be in trouble. On the other hand, if you were 50% through the project and 75% of the tasks are complete, the project is probably ok.

This is another example of the metrics you need to create a Culture of Accountability.



All Projects in Process.

Information as of: 3/29/2010
Project Status: In Process

Project_Manager	Project_Name	Plan Start Date	Actual Start Date	Plan Finish Date	% Calendar Complete	% Work Time Complete	Hold #	Assigned #	In Process #	Complete #
Allen Crouder	NGA 2	10/6/2008 8:00:00AM	10/2/2008 8:59:23AM	11/18/2008 5:00:00PM	100%	7%	14 87.50	0 0.00	2 12.50	0 0.00
Allen Crouder	NGA 4	10/13/2008 8:00:00AM	10/3/2008 12:57:22PM	11/25/2008 5:00:00PM	100%	17%	14 82.35	0 0.00	2 11.76	1 5.88
Allen Crouder	Paul 1	1/18/2010 8:00:00AM	1/11/2010 10:52:50AM	3/1/2010 5:00:00PM	100%	16%	14 87.50	0 0.00	2 12.50	0 0.00
Allen Crouder	Michael 1	1/25/2010 8:00:00AM	1/13/2010 8:24:43AM	2/9/2010 5:00:00PM	100%	22%	1 25.00	2 50.00	0 0.00	1 25.00
Allen Crouder	Pete Doc 3	2/22/2010 8:00:00AM	2/16/2010 12:20:35PM	4/5/2010 5:00:00PM	82%	9%	10 62.50	0 0.00	2 12.50	4 25.00
Allen Crouder	TWC Tower 4	3/8/2010 8:00:00AM	3/1/2010 3:24:46PM	3/25/2010 5:00:00PM	100%	28%	4 66.67	0 0.00	2 33.33	0 0.00
Allen Crouder	USAF 844th 1	3/15/2010 8:00:00AM	3/4/2010 5:54:02AM	4/26/2010 5:00:00PM	34%	11%	14 87.50	0 0.00	2 12.50	0 0.00
Allen Crouder	DISA 1	3/15/2010 8:00:00AM	3/4/2010 12:06:37PM	4/26/2010 5:00:00PM	34%	10%	14 87.50	0 0.00	2 12.50	0 0.00
Allen Crouder	Pediatrix 1	3/29/2010 8:00:00AM	3/15/2010 8:41:44AM	5/10/2010 5:00:00PM	2%	10%	13 81.25	1 6.25	1 6.25	1 6.25

Figure 15 – Project Details Report - sample report.

This is a one-line summary of the Project Summary Report.

Look at the 2 columns, % Calendar Complete and % Work Time Complete. This is dummy data but if it were real, you need to ask about projects that have finished 100% of the calendar but are not near completed. What's going on?



Budget vs. Actual by Manager.

Report Preview -- APM:Projects (fshqmk2)

1 of 1 90% Total:13 100% 13 of 13

Budget vs. Actual by Manager

Information as of: 8/3/01
 Project Status: In Process & Completed
 Project Manager: Allen Crouder
 Total Budget: \$183,200.00
 Total Actual: \$30,200.00

Project Name	Project Status	Planned	% of Total Budget	Actual	% of Total Actual	Planned to Actual Variance	% Planned to Actual Variance
First Test	In Process	\$25,400.00	14.71 %	\$1,600.00	5.93 %	\$23,800.00	93.70 %
HHS DC 1	In Process	\$23,100.00	13.38 %	\$900.00	3.33 %	\$22,200.00	96.10 %
Alamo 1	In Process	\$16,400.00	9.50 %	\$1,100.00	4.07 %	\$15,300.00	93.29 %
Duke Work	In Process	\$14,100.00	8.16 %	\$1,200.00	4.44 %	\$12,900.00	91.49 %
Cheryl 1	In Process	\$13,500.00	7.82 %	\$1,200.00	4.44 %	\$12,300.00	91.11 %
Raytheon 1	In Process	\$13,300.00	7.70 %	\$4,050.00	15.00 %	\$9,250.00	69.55 %
Harvard 1	In Process	\$12,900.00	7.47 %	\$1,100.00	4.07 %	\$11,800.00	91.47 %
AEP 1	In Process	\$12,000.00	6.95 %	\$2,850.00	10.56 %	\$9,150.00	76.25 %
Cox Comm 1	In Process	\$11,900.00	6.89 %	\$1,600.00	5.93 %	\$10,300.00	86.55 %
CA ISO 1	In Process	\$11,400.00	6.60 %	\$3,300.00	12.22 %	\$8,100.00	71.05 %
GCS	In Process	\$9,700.00	5.62 %	\$4,500.00	16.67 %	\$5,200.00	53.61 %
Hill AFB 1	In Process	\$9,000.00	5.21 %	\$3,600.00	13.33 %	\$5,400.00	60.00 %
Total In Process		\$172,700.00	100.00 %	\$27,000.00	100.00 %	\$145,700.00	84.37 %
Cal State U. Stan 1	Completed	\$10,500.00	100.00 %	\$3,200.00	100.00 %	\$7,300.00	69.52 %
Total Completed		\$10,500.00	100.00 %	\$3,200.00	100.00 %	\$7,300.00	69.52 %

Figure 16 –Budget vs. Actual Report by Manager - sample report.

This is another key report that can be used along with the priority to determine whether or not to keep a project going. This report tells you what the planned expenditure was as compared to the actual to date, and the planned to actual variance. If your planned to actual variance is high, i.e. not very much of the budget has been spent, and the priority is low, you should cancel the project. However, if most of the monies have been spent, the plan to actual variance is low, you probably want to finish the project.

One of the enhancements planned for the next version of APM Plus is to allow you to store your department's budget. That way, you can keep track of the dollars spent and committed, as compared to your overall budget.

Be aware that if you integrate Asset Mgt with APM Plus, these dollar amounts on this report include all costs: labor (time), expenses and asset costs. How do you do that with MS Project Server or any other PPM system?



All 5 Costs in One Place.

Proposed Project Details

Current Gate Level: APM-Planning

2011

Estimated Budget	100000	Proposed Budget	443175
Approved Budget	443175		
Planned Cost From APM	91800	Actual Cost From APM	0

Attachments:

File Name	Max Size	Attach Label
		Attachment...
		Attachment

Figure 17 – The 5 costs collected during the project life-cycle.

During the project life-cycle, the cost of a project comes in 5 different times, and they are all brought together in APM Plus on the Proposed Project record for the project.

1. When the requestor / sponsor first requests a new project, he/she puts in an estimated cost. It is stored in the Estimated Budget field.
2. When the team defining the project enters the resources (people, assets and expenses) they think are needed to do the project, units are multiplied by rates, and the Proposed Budget is calculated.
3. When the Steering Committee tentatively approves a dollar amount for a project, it is showed here as the Approved Budget.
4. When the project manager creates a detailed project plan which shows how the monies will be spent, that's stored a the Planned Cost from APM.
5. The Actual Cost from APM is the Actual and is current up to the last entry.

Having this data in one place allows you to see trends that you would not otherwise see. It is also important in creating a Culture of Accountability.



Project Remedies Inc.

III. Summary.

Evaluating where all of the current projects are against current goals and objectives and collecting the other metrics needed to determine if any projects should be terminated is a good short-term project. Putting a process in place to better control your projects and investments must be the long-term goal. Managing projects focuses the organization on what has to be done in the short term to complete the project at the lowest possible cost.

Frequently, we hear that one of management's goals is to create a culture of accountability but then they do nothing about it. Implementing a project management process as described above is a way to create a culture of accountability

To see a brief demonstration of the Analysis, Selection, Control and Evaluation process within APM Plus, please talk with your PRI Representative.

For more information about how Project Remedies can help you implement a seamless help desk-to-project response capability, improve quality, increase operational efficiencies, reduce costs and create a culture of accountability, please call your PRI account representative.

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About Project Remedies Inc.

Project Remedies Inc. is a leading technology and services company. We have:

- Developed Remedy-based applications.
- Provide Implementation and training services.
- Provide business definition and support services.
- Provide management services.

Headquartered in Los Angeles with offices in Spanish Fork, Utah, Project Remedies Inc. has been in the Remedy community since the company started in 1993, and is a BMC partner in BMC's Technology Alliance Partner program. All PRI applications have been developed in the United States by US citizens. For more information about Project Remedies Inc., visit www.projectremedies.com.