Project Remedies Inc.

"IT Resource Management in Remedy."

Aligning Resources with Business Priorities
Requires Up-to-the-Minute Visibility
When Ad-Hoc Projects are Requested.

A White Paper from Project Remedies Inc.

Abstract: "The problem is Resource Management, not Portfolio or Project Management," a senior program management consultant said recently. "After the project plan has been set by top management," she said, "it seems like the next week, the CIO receives a request for an 'ad hoc' project. Management needs detailed information to respond to the request. They need to know who is doing what and when, and how putting specific people on the new project will impact all the other projects. They need a process for managing all these micro projects because it is these small projects that eat your lunch. They also need to have an insight into everything else the person's time is committed to as well." The list of tasks resources work on is in constant flux. Resources are working on small projects such as maintenance projects, as well as larger projects. They are responding to help desk tasks and change requests. They are going to meetings and other events that have nothing to do with specific requests. In order to respond to a request for an ad hoc project, the detail needed is at the task level, not the project level. To understand resource availability, all the tasks to which resources have been assigned have to be tracked. Using Remedy's Action Request System as a central repository for tracking all resources and the tasks they are working is the least expensive, easiest, and fastest way for management to have visibility into resource availability.

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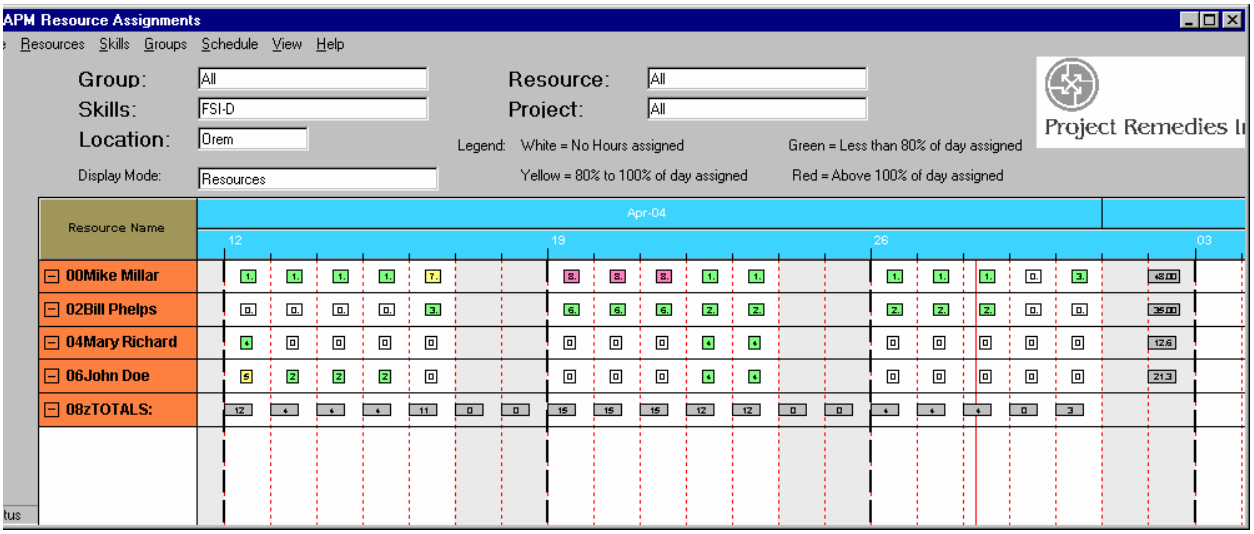
Situational Overview

IT resources are multi-tasking all the time and the specific tasks they are working on are changing all the time. They are working on tasks within on-going major projects, tasks within micro projects such as maintenance projects, tasks related to help desk calls and change orders, and more. While understanding resource commitments and availability is useful at a

macro level for strategic planning purposes, more specific information is needed when a request comes in for an ad hoc project. At that point, management needs detail. They need to know if using a specific resource for a specific period of time impacts the projects he/she is assigned to as well as the other tasks the person is working. That detail is at the task level.

What top management wants is a chart that shows how busy each resource is on any day, and the data has to be current (just-in-time reporting) because the details are changing so frequently. This chart has to be fed from multiple sources. The chart has different views: daily, weekly, and monthly; and can be summarized sorted various ways. Probably, the most important summary is Organization within Skill. That shows how busy all people with a skill are within each organization. When a manager comes to the Vice President and says: "We need to hire a consultant with this skill in this location for this period of time," the first thing the Vice President asks is: "Prove it." The second thing the Vice President asks is: Do we have anyone else in that location with that skill who is not too busy over that period of time?" This is the key question and it is answered by this charting functionality. This information leads to the more efficient use of resources and lowering of overall resource cost. A Vice President once said that this was an Enterprise Resource Plan.



The comprehensive solution involves:

- Having a central repository for all resource and task data.
- Managing both large projects and small projects with the same tool. Another tool might be used for planning projects.
- Tracking tasks from other applications with the same tool. These tasks typically come from help desk and change management applications.
- Creating and managing meaningful project plans for both large projects and small projects at the task level which show the resources assigned to each task.
- Applications which are "dirt simple," which do not overburden the end-users, and which do not require extensive training as a prerequisite.

- Applications that are easy for department managers to use, because most small projects are managed by department managers, not certified project managers, and these people do not have time for extensive, formal project management training.
- Management making communicating what they are doing part of everyone's job description.
- Management specifying the "right" level of detail to be tracked. The "right" level provides meaningful information to management yet does not overburden the end-users.
- Leveraging infrastructure investments already made. Expanding the use of software already in-house.
- Implementing the solution in the short term.

The Problem

Currently, the data is in multiple systems on multiple platforms and these products do not work together.

The tasks people are working are generated from multiple applications. In the past, companies have typically selected the "best" product for each application. Many companies use Remedy's Action Request System for help desk tasks, another product for change management tasks, MS Project for planning large projects and MS Project or some other product for time tracking. Time tracking is usually done at the project level. Small projects are often not managed.

If we could bring all of these applications together, the good news is that we leverage the investments already made, and the people are still using the same products. The bad news is that bringing the data together requires a major integration project that takes too long, costs too much, and involves too much risk. Someone once called this the "$1-5M, never-ending integration project." It is never-ending because each time one of the vendors has a new release, you have to do that integration again.

While MS Project may be a good planning tool, it is too difficult for most people to use for managing projects.

Some people like using MS Project for creating project plans and managing projects. Most people however think it is too complex to use for managing projects and particularly people who are not full-time project managers. Most will agree that it is not a good solution for an enterprise-wide problem. In several development organizations at Microsoft, other products are used.

Meaningful project plans at the task level, not the project level.

When responding to a request for a new ad hoc small project, the data that is needed is at the task level. Knowing that someone is assigned to a major project that is going on at the same time as the ad hoc project is not helpful. What is helpful is knowing the specific days that person has available time, i.e. not committed to working on tasks on the major project or other smaller projects. With this information, the manager can make a decision about if and when the ad hoc project can begin. Most companies track resource time at the project level, thereby losing the necessary detail for effective resource and cost management.

Most companies have tried implementing Program Management systems in the past and failed.

Most project management systems are too complex. As one user said: “It takes 18 months to get a project management process embedded in an organization. Most of the products on the market require everyone to know everything up front, and they just can’t.”

Most people managing projects will not have had a great deal of formal project management training.

If large projects are normally managed by project managers who have had formal project training, the great number of small projects are typically managed by department managers and team leads who have not had formal project management training and do not have time to have significant amounts of formal project management training in the short term.

Most end-users do not want to communicate what they are doing.

How many times have you heard “the system is too difficult to use” or “it takes more time to tell you what I did than it took to do it” or “I have not responded to the project manager’s email?” Two things are necessary. 1. Any product solution must first, before anything else, be very easy for the end-users to use. 2. Management must make good communication part of everyone’s job description. Good communication is the key to successful project management.

Management has created overly burdensome reporting requirements.

At one company, end-users had to enter administrative time against 27 categories of administrative tasks. Soon after the initial training, the users could not remember how to differentiate the different categories. As a result, they were turned off, accounting did not receive accurate data, and the system died of it’s own weight.

The Solution should expand the use of a product already used internally, is needed in the short term, and should not involve the time and expense of a major integration project.

The solution should be based on products already in use. If a number of products could be eliminated, thereby reducing the number of products managed in-house, that would be a positive.

There is urgency. The faster an effective resource management solution is implemented, the faster resources can be used more effectively. Even if IT organizations had the budget (and they do not), the time, expense, and risk involved with a major integration project results in this being a poor alternative.

A better solution would be a suite of integrated applications that run in the same environment. It would be even better if the applications can be a combination of out-of-the-box applications created by the vendor and vendor partners, and custom-built applications developed by an internal development organization.

The Solution: ActionProgram Manager and the Remedy AR System

The ideal solution to the business problem detailed above has several characteristics.

- Can be implemented quickly.
- Is very easy to use
- Leverages previous investments in software, hardware and training.
- Offer a Central Repository for data, including tasks and resources.
- Has the same user interface.
- Is web-based.
- Has workflow functionality.
- Uses the same communication mechanisms: email, pager, Palm Pilot, cell phone.
- Supported by an existing internal development team.

The Remedy AR System

Although it's been marketed as a help desk system and frequently thought of as a "trouble-ticketing" system, Remedy Action Request System (AR System) is, in fact, a robust development environment – a true client server and GUI front-end to the major databases (SQL Server, Oracle, Sybase, Informix, and DB2) for tracking and workflow applications. The AR System has a dual purpose. It is the premier application platform and the premier development environment, handling *all* applications – packaged, homegrown, and customized.

As a workflow engine, the AR System allows the administrator to embed the company's business processes within it. Because the AR System is most frequently used for help desk applications, the first processes implemented are the problem management processes.

The AR System, however, is not a trouble-ticketing system. It's a development environment that can be used for all kinds of applications that generate tasks and involve workflow. Some IT professionals call it a "great request management" system, while others think of it as a "great task generator." But whichever way you want to think about it, the AR System has been so successful because its users have been successful defining their business processes in it.

As previously mentioned, there are three major task-generating applications: help desk, change management, and program management. Remedy Corporation has developed and markets both Help Desk and Change Management systems, which interface with Remedy's Asset Management system. Many users create their own applications with the AR System, hire consulting firms to build applications from scratch using this tool, or modify existing Remedy-built applications.

ActionProgram Manager – The only PM system built on a workflow engine

This is where Project Remedies comes in. Because of their depth of experience in program management systems in general and the AR System in particular, the people at Project Remedies decided to create ActionProgram Manager (APM), a program management, resource management, and time- and expense-tracking system built using the AR System. APM is designed to be used standalone; as an enterprise-wide program management, resource management, and time- and expense-tracking system; or combined with Remedy's applications, or with custom-built applications using the AR System, to create a work management / resource management system. APM can also be integrated with other AR System-based applications

when implementing processes which cross organizational and application boundaries such as the bug reporting / defect tracking application. APM can also interface with Remedy's Asset Management system. It has a robust interface with Microsoft Project, so project plans created in MS Project can be imported into APM for approval, management, and time tracking.

ActionProgram Manager – The only PM system that interfaces with an Asset Management system

APM can also interface with Remedy's Asset Management system. In fact, asset costs can be tracked in an APM project task. In APM, the baseline cost, current plan cost, and actual cost are tracked. For each, resource cost, expenses and asset costs can be tracked.

ActionProgram Manager – Dirt Simple.

- One of our first users said that ActionProgram Manager "was, in his career, the only PM system that he's seen work." He said "It takes 18 months to get a program management process embedded within an organization. Most of the current systems require that everyone know everything up front, and they just can't. You've designed it to be dirt simple, and it's written in Remedy so it's totally flexible. My people can add fields, change workflow, create different t views for different users, and as people get more experienced, give them access to more data fields."

Conclusion

From a business standpoint, a system has long been needed that lets an organization easily plan all the little projects they are working on as well as the large projects, approve project plans, work and manage all these projects in real time, and generate accurate reports for every project – enterprise wide – all within the same system. Clearly, the ideal solution was one that could leverage an organization's existing investment in the Remedy AR System, due to its almost universal usage.

Project Remedies' ActionProgram Manager provides this solution. Because it runs on the AR System platform along with all the other applications used for generating tasks for resources, this flexible, easy-to-use, cost-effective application can combine with other Remedy-based applications to form a comprehensive Work Management / Resource Management system. It combines program management, problem management, service requests and change management into a single unified process for the entire IT organization. APM represents a whole new concept – Work Management – and replaces the incredibly costly, never-ending integration project for understanding IT costs. In essence, APM gives managers the information they need, when they need it, in a format they've been using – allowing them to make better-educated decisions to streamline and maximize their organization's effectiveness.

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