KINTANA™

PMO User Guide

Version 5.0.0

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Kintana Version 5.0.0

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Chapter 1 Introduction

The Kintana Program Management Office Solution provides organizations with a single location from which Program Managers can initiate, operate, and manage their portfolio of programs and projects.

Organizations implement a Program Management Office in order to:

- Ensure alignment of IT projects with business objectives
- Eliminate duplicate and non-priority efforts
- Improve operational efficiency
- Leverage resources
- Ensure on-time and on-budget delivery

To ensure these business requirements are met, Kintana provides a full project lifecycle solution. Starting with new project or program requests, Kintana enforces systematic capturing of all relevant functional specifications and priorities. Appropriate business user approvals based on project scope, budget level, and other business rules are built in. Once approved, the Program provides a single point for visibility and control over relevant projects and requests.

Features and Benefits

The Kintana Program Management Office Solution provides the following features and benefits:

- *Single Point of Visibility and Control over all IT Programs and Projects*
- *Standardize Processes for Program Management Activities*

- *Intuitive Program Creation*
- *Streamline and Automate Project Execution*

Single Point of Visibility and Control over all IT Programs and Projects

The Kintana Program Management Office Solution eliminates the manual processes and guesswork required for reporting and tracking program status. Program health is automatically calculated based on related Projects (Kintana Drive) and Requests (Kintana Create) in real time. As tasks are completed, status is automatically rolled up to the Project. Configurable visual indicators provide a quick view into the health of a program based on risk, scope changes, issues, and outstanding resource requests.

Valuable Program Management resources can now spend their time evaluating risks and scope changes, rather than tracking down project managers to update program status in the latest spreadsheet. You can easily request scope changes against projects in the program. Since each program is linked to a project (or many projects), each program shows a summary view of the scope change requests for the program. The summary view indicators turn red, yellow, or green, based on number and severity. From this summary view, the program manager can navigate to the scope change requests with a single mouse click.

Specific features enable you to:

- Link programs to prioritized business objectives, helping to ensure alignment
- Group multiple projects into programs to provide summary information about overall status of the program from the Kintana Dashboard
- Have real-time status on program health through graphical indicators based on configurable thresholds of risk, scope, resources, and issues
- Configure fields to collect site-specific data
- Prioritize programs

Standardize Processes for Program Management Activities

Most of the day-to-day activities of the Program Management Office involve evaluation and prioritization of issues that arise around the Program: risks to one or more project, scope changes, resource requests, and issues that encompass everything from procuring computers for members of the project team to refreshing databases. Kintana’s unique combination of project management and process management makes codifying these processes easy with:

- Proven-practice Requests and Workflows for managing scope changes, risk, project issues, and resource requests
- Graphical indicators on programs that summarize each activity for visibility and easy access
- Built–in escalations notify the Program Management Office when issues need their attention
- Reports of historical performance on PMO activities

Intuitive Program Creation

Kintana simplifies the process of creating a program. From the requesting of a new business capability through establishing the program, Kintana provides easy-to-follow steps to get the entire job done. The right people are notified at the right time when their participation is required (for approvals, alignment review, additional information, etc.)

Streamline and Automate Project Execution

Kintana Program Management Office solution seamlessly links to Kintana Drive's project management capabilities, bringing your projects to life, and allowing project and program managers to focus on real project issues. When tasks are ready for work, a notification is sent to the assigned resource and the task automatically appears on the user's Home page. As task owners update their tasks from their personalized Kintana Dashboard, the status is automatically rolled up to the program. Tasks can also be linked to requests when a repeatable, consistent process is required. As linked requests are updated, the status of the task is automatically updated and rolled up to the program status as well.

Supported Roles

The Kintana Program Management Office Solution supports the following business roles:

Program Manager

Program Managers create and manage Programs. The responsibilities of a Program Manager include:

- Monitoring Program status, including linked Projects
- Resolving Risks/Issues affecting Programs
- Incorporating Scope Changes into Program initiatives
- Maintaining visibility into Program Resource allocations and requests
- Providing Program status visibility to stakeholders and business users

Project Manager

Project Managers create and manage Projects, which can become part of Programs. For more information on Projects, see *"Working with Projects"*.

Stakeholder

A Stakeholder is a Kintana user who creates and monitors Programs without necessarily being involved in day-to-day Program Management.

Resource

A Resource is a Kintana user who participates in Programs. This participation can be accomplished by being part of a linked Project or part of the resolution process for a Program-related Request. Depending on the type of Request, a Resource can also create and submit Program-related Requests.

Additional Resources

Kintana provides the following additional resources to help you successfully implement, configure, maintain and fully utilize your Kintana installation:

- *Kintana Documentation*
- *Kintana Services*
- *Kintana Education*
- *Kintana Support*

Kintana Documentation

Kintana product documentation is linked from the Kintana Library page. This page is accessed by:

- Selecting **HELP > KINTANA LIBRARY** from the Kintana Workbench menu.
- Selecting **HELP > CONTENTS AND INDEX** from the menu bar on the HTML interface. You can then click the **KINTANA LIBRARY** link to load the full list of product documents.

Kintana organizes their documents into a number of user-based categories. The following section defines the document categories and lists the documents currently available in each category.

- *Kintana Business Application Guides*
- *User Guides*
- *Kintana Application Reference Guides*
- *Kintana Instance Administration Guides*
- *External System Integration Guides:*
- *Kintana Solution Guides*
- *Kintana Accelerator Guides*

Kintana Business Application Guides

Provides instructions for modeling your business processes in Kintana. These documents contain process overviews, implementation instructions, and detailed examples.

- Configuring a Request Resolution System (Create)
- Configuring a Deployment and Distribution System (Deliver)
- Configuring a Release Management System
- Configuring the Kintana Dashboard
- Managing Your Resources with Kintana
- Kintana Reports

User Guides

Provides end-user instructions for using the Kintana products. These documents contain comprehensive processing instructions.

- Processing Packages (Deliver) User Guide
- Processing Requests (Create) User Guide
- Processing Projects (Drive) User Guide
- Navigating the Kintana Workbench:
  Provides an overview of using the Kintana Workbench
- Navigating Kintana:
  Provides an overview of using the Kintana (HTML) interface

Kintana Application Reference Guides

Provides detailed reference information on other screen groups in the Kintana Workbench. Also provides overviews of Kintana's command usage and security model.

- Reference: Using Commands in Kintana
- Reference: Kintana Security Model

- Workbench Reference: Deliver
- Workbench Reference: Configuration
- Workbench Reference: Create
- Workbench Reference: Dashboard
- Workbench Reference: Sys Admin
- Workbench Reference: Drive
- Workbench Reference: Environments

Kintana Instance Administration Guides

Provides instructions for administrating the Kintana instances at your site. These documents include information on user licensing and archiving your Kintana configuration data.

- Kintana Migration
- Kintana Licensing and Security Model

External System Integration Guides:

Provides information on how to use Kintana's open interface (API) to access data in other systems. Also discusses Kintana's Reporting meta-layer which can be used by third party reporting tools to access and report on Kintana data.

- Kintana Open Interface

Kintana Solution Guides

Provides information on how to configure and use functionality associated with the Kintana Solutions. Each Kintana Solution provides a User Guide for instructions on end-use and a Configuration Guide for instructions on installing and configuring the Solution.

Kintana Accelerator Guides

Provides information on how to configure and use the functionality associated with each Kintana Accelerator. Kintana Accelerator documents are only provided to customers who have purchased a site-license for that Accelerator.

Note

Kintana provides documentation updates in the Download Center section of the Kintana Web site (http://www.kintana.com/support/download/download_center.htm).

A username and password is required to access the Download Center. These were given to your Kintana administrator at the time of product purchase. Contact your administrator for information on Kintana documentation or software updates.

Kintana Services

Kintana is a strategic partner to its clients, assisting them in all aspects of implementing a Kintana technology chain - from pilot project to full implementation, education, project turnover, and ongoing support. Our Total Services Model tailors solution and service delivery to specific customer needs, while drawing on our own knowledgebank and best practices repository. Learn more about Kintana Services from our Web site:

http://www.kintana.com/services/services.shtml

Kintana Education

Kintana has created a complete product training curriculum to help you achieve optimal results from your Kintana applications. Learn more about our Education offering from our Web site:

http://www.kintana.com/services/education/index.shtml

Kintana Support

Kintana provides web-based interactive support for all products in the Kintana product suite via Contori.

http://www.contori.com

Login to Contori to enter and track your support issue through our quick and easy resolution system. To log in to Contori you will need a valid email address at your company and a password that will be set by you when you register at Contori.

Chapter 2

Key Concepts and Definitions

The following sections define the common concepts and terms related to the Kintana Program Management Office Solution. Knowledge of these terms will help the reader gain a more thorough understanding of Program Management.

The following entities are discussed:

- *Program*
- *Program Management*
- *Business Objective*
- *Issue*
- *Scope Change*
- *Risk*
- *Resource Request*
- *Portlet*
- *Personalization*
- *Templates*

Program

A Program is a collection of Projects and associated Scope Changes, Risks, Issues, and Resource Requests. Programs feature full drill-down into Projects and Requests, as well as roll-up of relevant data from Projects and attached Requests. Much like Projects, Programs have associated Summary Conditions and configurable Exception indicators.

Example

A Program can be created to oversee the upgrade of Company A's Customer Service computer system for better integration with the Sales force. Projects are created by the Customer Service, Sales, and IT managers. Each Resource handles their own aspect of the work, and are linked and monitored by the Program. At the same time, Risks and Scope Changes submitted against the Program are tracked and followed up on.

Program Management

The Program Management Office Solution allows a Program Manager to deliver a new business capability or solve a problem using Programs. Using Programs, a Program Manager can do the following:

- Oversee related IT projects
- Coordinate inter-project deliverables and milestones
- Manage scope change
- Identify and mitigate risks
- Resolve inter-project issues
- Manage the allocation of resources
- Initiate Program Requests (by Stakeholders)

Business Objective

Business Objectives are a set of business goals that can be prioritized and tied to Programs. Business Objectives can be created, modified, and deleted independently of Programs. Business Objectives that have already been linked to Programs cannot be deleted.

Example

Company A creates a Business Objective, "Reduce order to delivery time." This Objective is assigned a priority and associated with the Program created to upgrade Company A's Customer Service system.

Issue

Issues introduce a framework for all Project and Program-related issues to be identified and resolved. Issues can span multiple Request Types, enabling a finer level of visibility over the resolution process.

Example

Bugs and Enhancements can both be Issues. Each Request Type will be processed along its own Workflow, though they may share common fields for tracking purposes.

Scope Change

Scope Changes provide a way to ensure that the scope of a Program and its individual Projects stay manageable. Submitted Scope Change Requests can be assessed before being rejected or incorporated into Program or Project scope. Program and Project scope can be controlled by ensuring that possible changes are clearly identified, aligned, and processed.

Risk

Risks supply a way to log and resolve risks that threaten a Program. The process of gathering information about possible risks — including impacts and probability of occurring — is streamlined. Program Summary Condition Indicators can be configured to alert users to varying levels of risk.

Example

Company A's Program Manager configures the Customer Service upgrade Program to show a red indicator if more than two Risks with Impact Level 1 and Probability High are created.

Resource Request

Resource Requests allow a Program Manager to more easily and quickly request and approve resources, as well as maintain visibility over resource needs and allocations.

Portlet

Portlets are configurable, role-based visual displays that provide relevant summary information of your business data. Multiple portlets can be displayed on a single HTML page. Each user can select which portlets they would like to display on their Dashboard. They can personalize those portlets to display only the information that is relevant specifically to their Projects, Tasks, Packages, or Requests.

In addition to providing relevant information for higher visibility, portlets also provide the user with the ability to drill down into the details of the Project, Task, Request or Package. This enables the user to access and update information from a single Web page.

Kintana features a set of portlets for Program Management. These portlets are designed to provide the most efficient and flexible access to your Program Management data:

- *Program List Portlet*
- *Program Project List Portlet*
- *Program Issue List Portlet*
- *Program Resource Request List Portlet*
- *Program Risk List Portlet*
- *Program Scope Change List Portlet*
- *Resource Assignments Portlet*

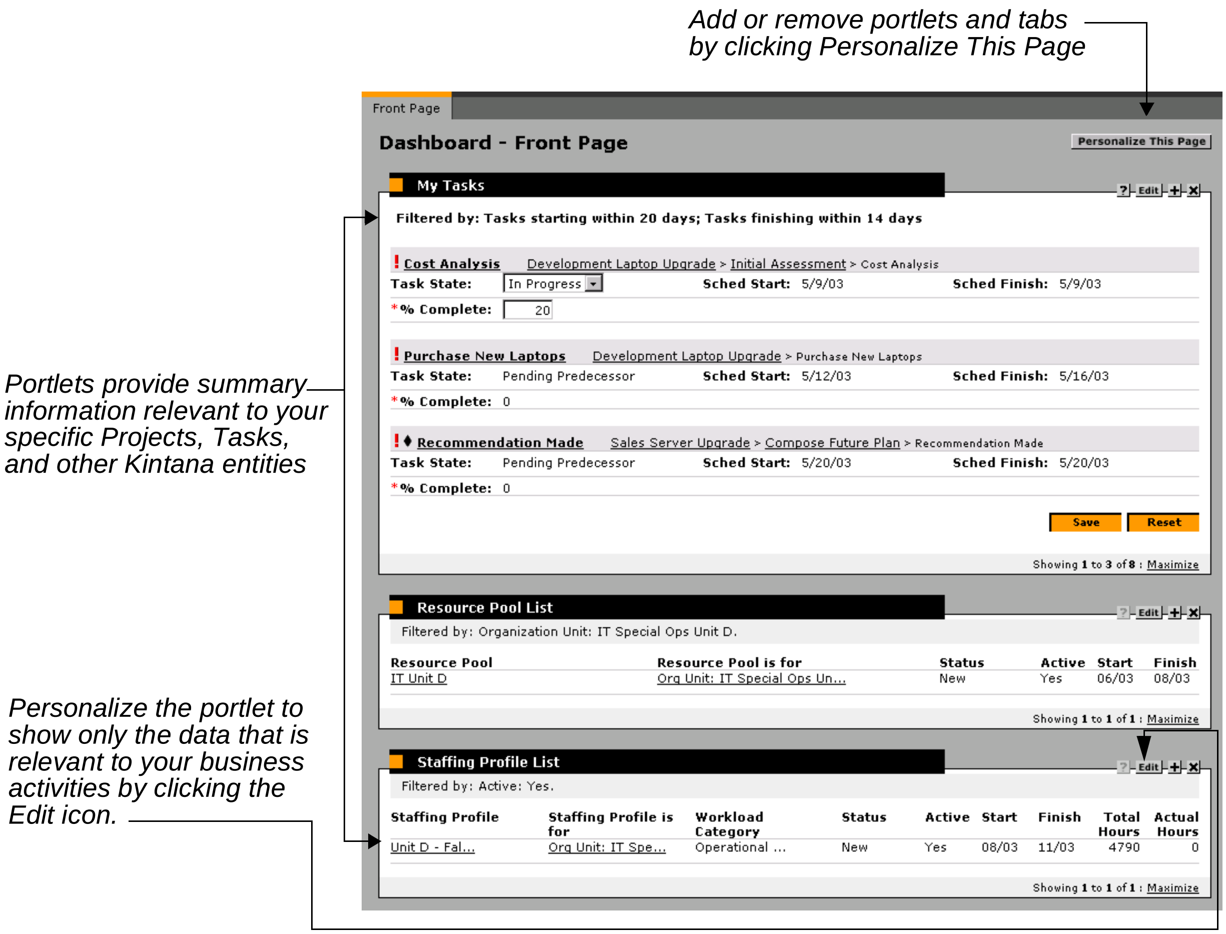


Figure 2-1 Kintana Home Page

Personalization

The Kintana Dashboard can be personalized to show data that is relevant only to the logged-on user. Users can select which portlets are displayed on their own Home page and filter for appropriate information in each portlet. For example, a CIO may select to display the Program Issue List portlet, which displays a summary view of all the Program Issues created by his organization.

Additionally, users can add multiple "tabs" to their Home page. Each tab consists of different portlets. Kintana recognizes your logon information and remembers which portlets you have decided to display as well as the filtering information for each selected portlet. Using the above example, each time the CIO logs onto Kintana, this user will see the Program Issue List portlet.

Templates

Users can import templates into their Kintana Dashboard. These templates are added as a new tab to your Home page. They consist of a set of portlets and a specialized menu that includes actions, links to configuration entities, and relevant reports. Once imported, users can personalize the template to suit their specific business needs.

Chapter 3

User Interface Overview

Kintana features both a Workbench (Java) and an HTML interface for managing items in the Kintana Product Suite. The Kintana Program Management Office Solution takes advantage of the full power of the Kintana suite, using the Kintana (HTML) interface for creating, processing, and managing Programs; and using the Kintana Workbench to configure Program Management-related processes and infrastructure.

The following sections describe the unique features of the Program Management interface. The use of standard Kintana features, including the Kintana Dashboard, is discussed in the Kintana user guides.

The following interface features are discussed:

- *Kintana Dashboard Pages*
- *Personalize: Kintana Home*
- *Program Management Menu*
- *Program Management Office Portlets*
- *Included Content*

Kintana Dashboard Pages

Your Kintana Dashboard can have multiple pages, each one housing a different array of Kintana portlets. Each Dashboard page can be personalized using the **PERSONALIZE THIS PAGE** button. The preconfigured Program Management template also include a specialized menu that contains activities, links to maintain your Program Management processes, and reports.

Portlets can be moved from one Dashboard page to another using the **PERSONALIZE THIS PAGE** function. You can also change the order of the Dashboard pages or delete them from your Dashboard altogether.

Selecting **DASHBOARD -> LAST VISITED** from the navigation bar returns you to the most recently selected Dashboard page.

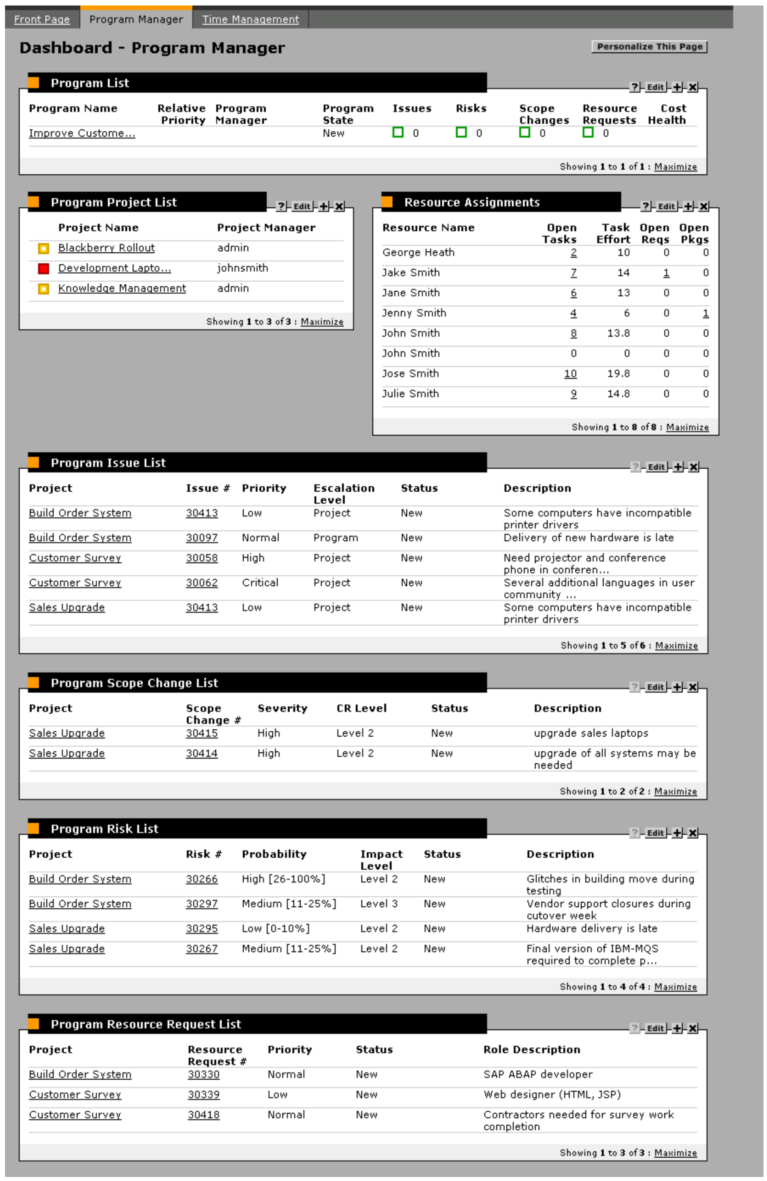


Figure 3-1 Program Management Office Home page

Personalize: Kintana Home

The PERSONALIZE: DASHBOARD page is used to select and configure the general layout of your Dashboard. Use this page to perform the following tasks:

- Add or remove portlets from your Dashboard
- Create new Dashboard pages
- Alter the portlets' locations on the page and between the tabs

Portlets can be moved from one Dashboard page to another using the PERSONALIZE: DASHBOARD page. You can also change the order of the Dashboard pages or delete them from your Home page altogether.

Figure 3-2 provides a graphical overview of the PERSONALIZE: DASHBOARD page. For detailed instructions on using the PERSONALIZE: DASHBOARD page to configure the look and feel of your Dashboard, see *"Setting Up Your Dashboard"* on page 31.

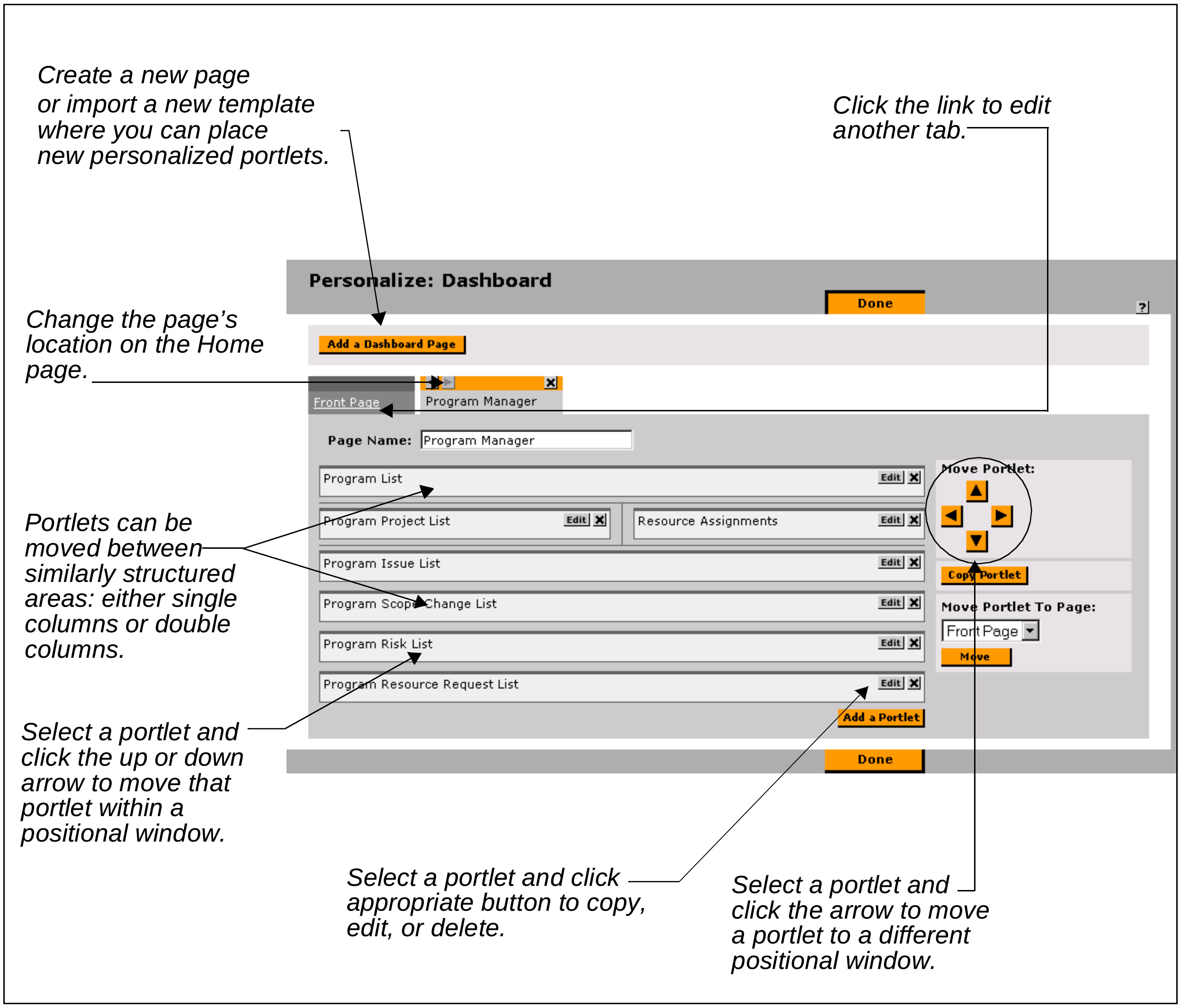


Figure 3-2 Personalize Page Overview

Program Management Menu

The Kintana Program Management Office template is configured with a specialized menu that contains activities, links to maintain your Program Management processes, and reports. *Table 3-1* defines the menu items that are installed with the default shipment of the Kintana Program Management Office Solution.

Note

These menu items may vary slightly depending on on-site configuration during Program Management Office installation.

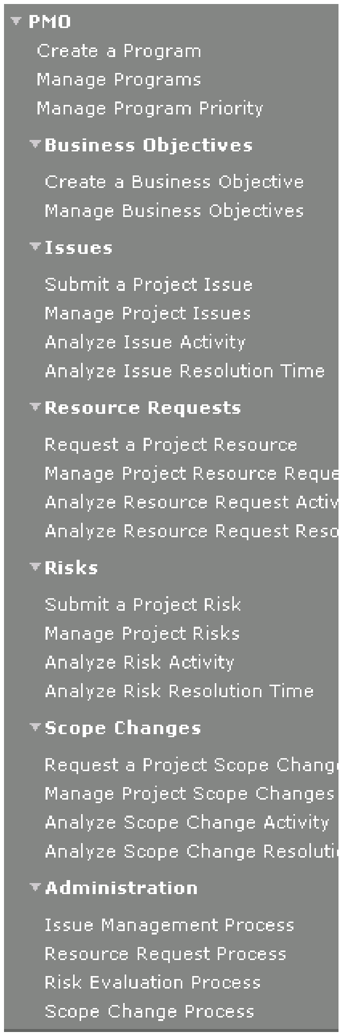


Figure 3-3 Program Management Office Menu Group

Table 3-1. Default Program Management Office Menus

Menu	Menu Item	Description
	CREATE A PROGRAM	Opens the first ENTER PROGRAM INFORMATION page, where you can create a new Program.
	MANAGE PROGRAMS	Opens the SEARCH FOR PROGRAMS TO MANAGE page, where you can search for Programs.
	MANAGE PROGRAM PRIORITY	Opens the PRIORITIZE PROGRAMS page, where you can update the relative priority of all Programs.
BUSINESS OBJECTIVES	**CREATE A BUSINESS OBJECTIVE**	Opens the NEW BUSINESS OBJECTIVE page, where you can create a new Business Objective.
	MANAGE BUSINESS OBJECTIVES	Opens the BUSINESS OBJECTIVES page, where you can create a new Business Objective or modify or delete existing ones.
ISSUES	**SUBMIT A PROJECT ISSUE**	Opens a Kintana page where you can log a Request for an Issue.
	MANAGE PROJECT ISSUES	Opens the REQUEST SEARCH page with the Issue Request Type defaulted, so you can search for Issues.
	ANALYZE ISSUE ACTIVITY	Opens the ISSUE ACTIVITY page, where you can view information on Issue Request activity.
	ANALYZE ISSUE RESOLUTION TIME	Opens the ISSUE RESOLUTION page, where you can view information on Issue Request resolution time.
RESOURCE REQUESTS	**REQUEST A PROJECT RESOURCE**	Opens a Kintana page where you can log a Request for a Resource.
	MANAGE PROJECT RESOURCE REQUESTS	Opens the REQUEST SEARCH page with the Resource Request Type defaulted, so you can search for Resource Requests.
	ANALYZE RESOURCE REQUEST ACTIVITY	Opens the RESOURCE REQUEST ACTIVITY page, where you can view information on Resource Request activity.
	ANALYZE RESOURCE REQUEST RESOLUTION TIME	Opens the RESOURCE REQUEST RESOLUTION page, where you can view information on Resource Request resolution time.

Table 3-1. Default Program Management Office Menus

Menu	Menu Item	Description
RISKS	**SUBMIT A PROJECT RISK**	Opens a Kintana page where you can submit a Request indicating a Risk.
	MANAGE PROJECT RISKS	Opens the REQUEST SEARCH page with the Risk Request Type defaulted, so you can search for Risks.
	ANALYZE RISK ACTIVITY	Opens the RISK ACTIVITY page, where you can view information on Risk Request activity.
	ANALYZE RISK RESOLUTION TIME	Opens the RISK RESOLUTION page, where you can view information on Risk Request resolution time.
SCOPE CHANGES	**REQUEST A PROJECT SCOPE CHANGE**	Opens a Kintana page where you can log a Request for a Scope Change.
	MANAGE PROJECT SCOPE CHANGES	Opens the REQUEST SEARCH page with the Scope Change Request Type defaulted, so you can search for Scope Changes.
	ANALYZE SCOPE CHANGE ACTIVITY	Opens the SCOPE CHANGE ACTIVITY page, where you can view information on Scope Change Request activity.
	ANALYZE SCOPE CHANGE RESOLUTION TIME	Opens the SCOPE CHANGE RESOLUTION page, where you can view information on Scope Change Request resolution time.
ADMINISTRATION	**ISSUE MANAGEMENT PROCESS**	Opens the Workflow window for the PMO - Issue Management Workflow in the Kintana Workbench. *Note: you must have a Power License to access the Kintana Workbench.*
	SCOPE CHANGE PROCESS	Opens the Workflow window for the PMO - Scope Change Request Workflow in the Kintana Workbench. *Note: you must have a Power License to access the Kintana Workbench.*
	RISK EVALUATION PROCESS	Opens the Workflow window for the PMO - Risk Management Process Workflow in the Kintana Workbench. *Note: you must have a Power License to access the Kintana Workbench.*
	RESOURCE REQUEST PROCESS	Opens the Workflow window for the PMO - Resource Request Workflow in the Kintana Workbench. *Note: you must have a Power License to access the Kintana Workbench.*

Selecting **Create -> Initiative Request** from the navigation bar allows you to initiate a Program Request.

Business Objectives List Page

The Business Objectives List page allows you to view and manage your Business Objectives from a central location. Click the name of a Business Objective to edit it, or click the to delete it. Click **Create New** to create a new Business Objective.

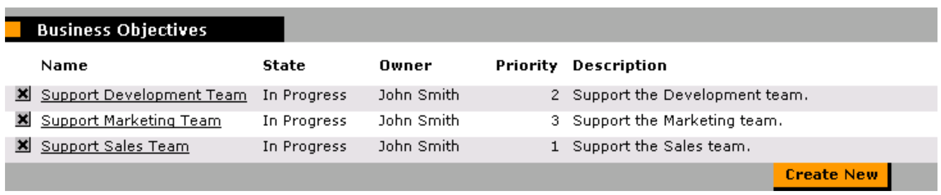


Figure 3-4 Business Objective List Page

See *"Working With Business Objectives"* on page 37 for more detailed information on using the Business Objectives List page.

Manage Program Page

The Manage Program page is used to view the details of a Program, including linked Projects, Program Requests, and Business Objectives. Program Requests are broken down by Type, with drill-downs for each category. To modify any aspect of the Program, click **Modify Program**. Click **Program Settings** to change the Program Summary Condition Indicator configurations. Click **Configure Access** to change the Program's user access settings. See *"Working With Programs"* on page 70 for more detailed information on using the Manage Program page.

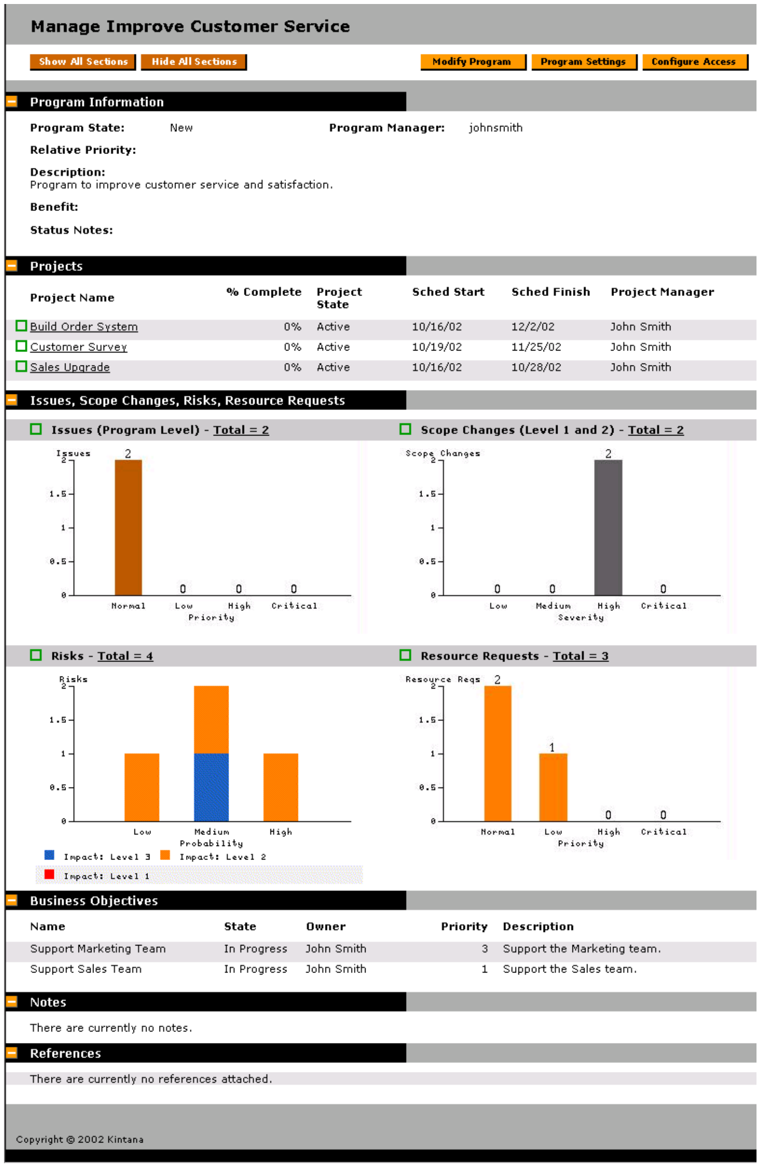


Figure 3-5 Manage Program Page

Adjust Program Settings Page

The ADJUST PROGRAM SETTINGS page allows you to adjust settings for Program Summary Condition Indicators. You can configure Indicators for each Program Request Type separately, as well as turn them on and off. See *"Modifying Indicator Settings"* on page 76 for more detailed information on using the Summary Condition Configuration page.

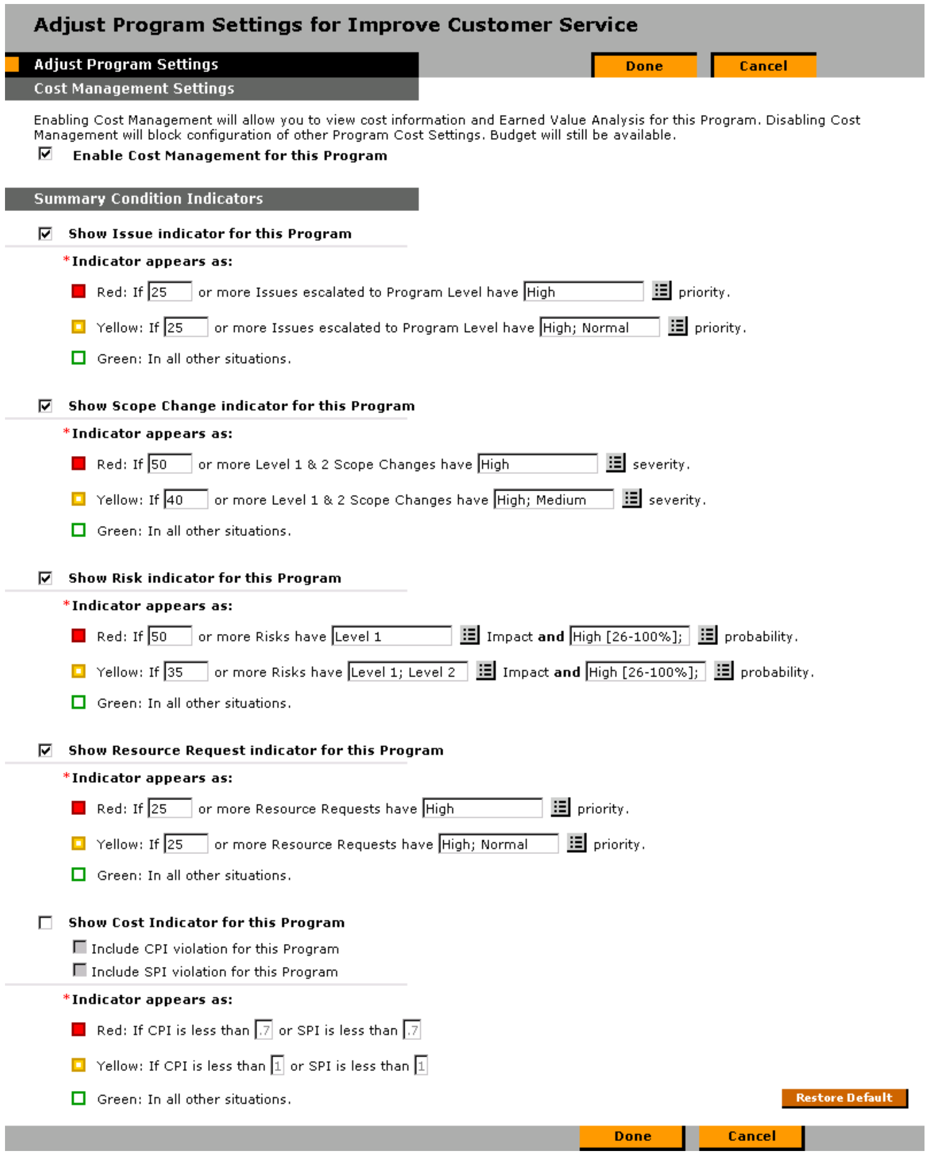


Figure 3-6 Summary Condition Configuration Page

Activity and Resolution Time Pages

The Activity and Resolution Time pages, available for each Program Management Request Type, allow you to see Program Management Request activity and resolution rate over time in graphical format. The results shown can be filtered using several useful variables. Activity and Resolution Time pages for each Program Management Request Type are accessible through the Program Management submenu at the top of the page. See *"Reports"* on page 79 for more detailed information on using the Activity and Resolution Time pages.

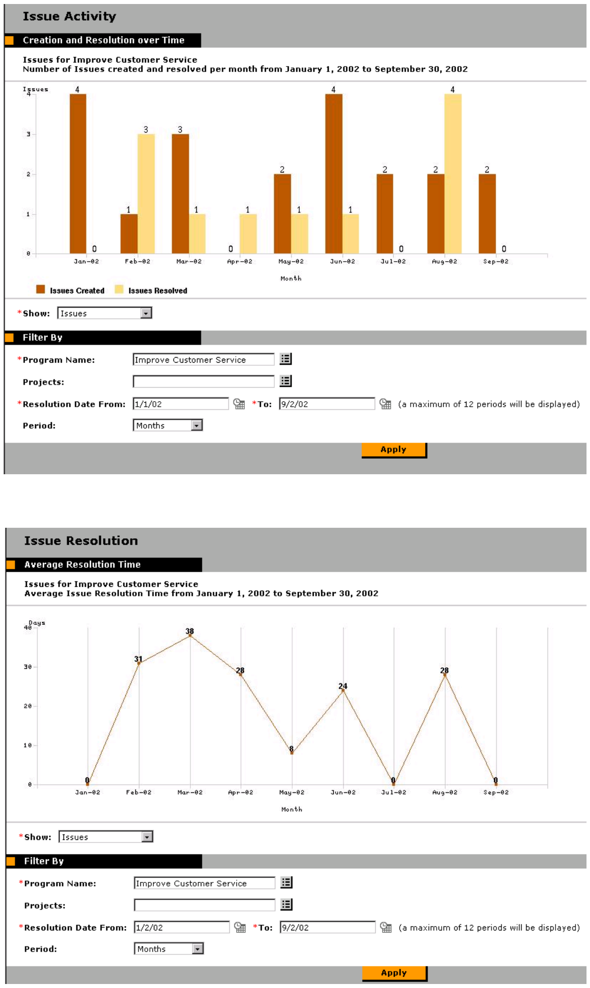


Figure 3-7 Activity and Resolution Time Pages for Program Issue Request Type

Program Management Office Portlets

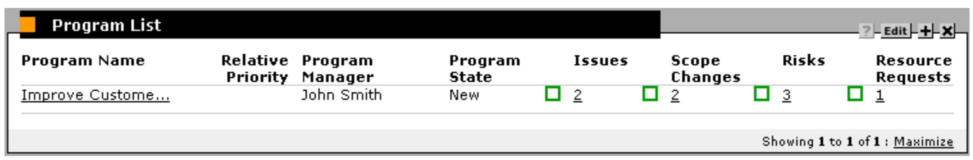
The Program Management Office solution introduces a number of specialized portlets to your Kintana Dashboard. The following portlets can be added to any existing or new Dashboard page in the Kintana interface:

- *Program List Portlet*
- *Program Project List Portlet*
- *Program Issue List Portlet*
- *Program Resource Request List Portlet*

- *Program Risk List Portlet*
- *Program Scope Change List Portlet*
- *Resource Assignments Portlet*

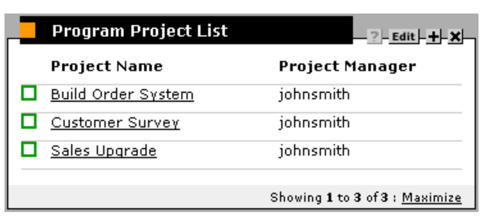
Program List Portlet

The Program List portlet provides a high-level summary of the details and current status of one or more Programs. The Program List portlet can be personalized to display Programs based on specified criteria (Program State, Manager, Business Objectives, etc.). Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.



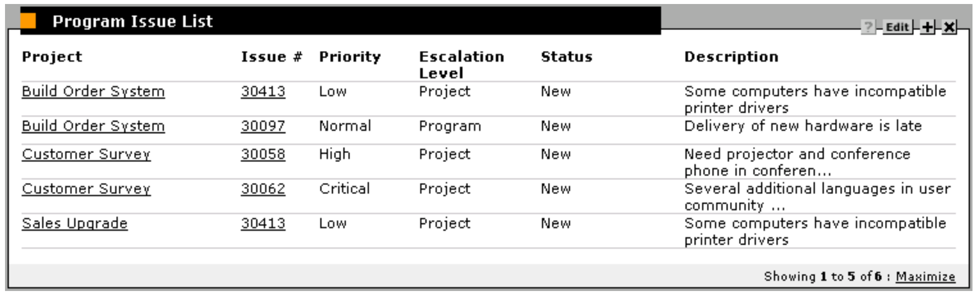
Program Project List Portlet

The Program Project List portlet provides a view into all the Projects associated with a Program and their respective health. This portlet can have multiple instances for viewing different Programs and their associated Projects. You can select which Projects the portlet displays based on a number of specified criteria including Program Name, Project Name, State, and Summary Condition.



Program Issue List Portlet

The Program Issue List portlet displays all the Issues associated with a Program. This portlet can have multiple instances for viewing different Programs and their associated Issues. The Program Issue List portlet can be personalized to display Issues based on specified criteria (Status, Priority, Escalation Level, etc.). Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.



Program Issue List

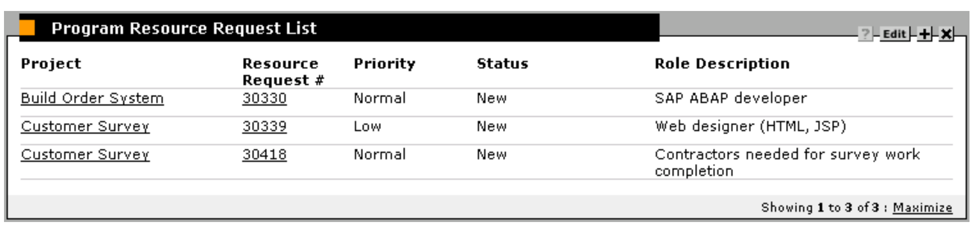
Edit

Project	Issue #	Priority	Escalation Level	Status	Description
Build Order System	30413	Low	Project	New	Some computers have incompatible printer drivers
Build Order System	30097	Normal	Program	New	Delivery of new hardware is late
Customer Survey	30058	High	Project	New	Need projector and conference phone in conferen…
Customer Survey	30062	Critical	Project	New	Several additional languages in user community …
Sales Upgrade	30413	Low	Project	New	Some computers have incompatible printer drivers

Showing **1** to **5** of **6** : Maximize

Program Resource Request List Portlet

The Program Resource Request List portlet displays all the Resource Requests associated with a Program. This portlet can have multiple instances for viewing different Programs and their associated Resource Requests. The Program Resource Request List portlet can be personalized to display Resource Requests based on specified criteria (Created in the last X days, Status, Priority, etc.). Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.



Program Resource Request List

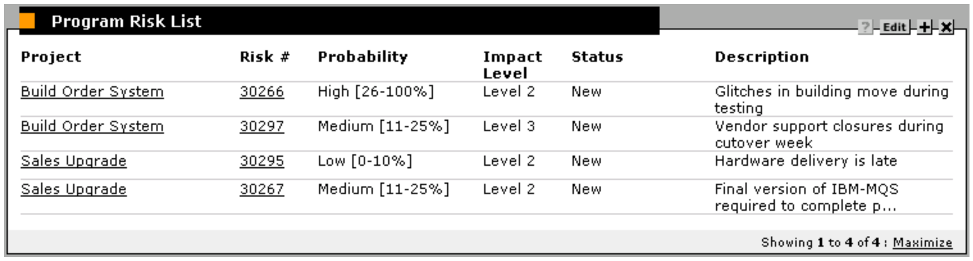
Edit

Project	Resource Request #	Priority	Status	Role Description
Build Order System	30330	Normal	New	SAP ABAP developer
Customer Survey	30339	Low	New	Web designer (HTML, JSP)
Customer Survey	30418	Normal	New	Contractors needed for survey work completion

Showing **1** to **3** of **3** : Maximize

Program Risk List Portlet

The Program Risk List portlet displays all the Risks associated with a Program. This portlet can have multiple instances for viewing different Programs and their associated Risks. The Program Risk List portlet can be personalized to display Risks based on specified criteria (Created By, Probability, Impact Level, etc.). Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.



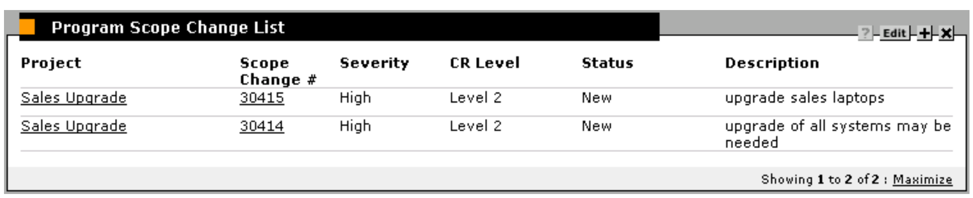
Program Risk List

Project	Risk #	Probability	Impact Level	Status	Description
Build Order System	30266	High [26-100%]	Level 2	New	Glitches in building move during testing
Build Order System	30297	Medium [11-25%]	Level 3	New	Vendor support closures during cutover week
Sales Upgrade	30295	Low [0-10%]	Level 2	New	Hardware delivery is late
Sales Upgrade	30267	Medium [11-25%]	Level 2	New	Final version of IBM-MQS required to complete p...

Showing 1 to 4 of 4 : Maximize

Program Scope Change List Portlet

The Program Scope Change List portlet displays all the Scope Change Requests associated with a Program. This portlet can have multiple instances for viewing different Programs and their associated Scope Changes. The Program Scope Change List portlet can be personalized to display Scope Change Requests based on specified criteria (Project Name, Severity, Change Request Level, etc.). Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.



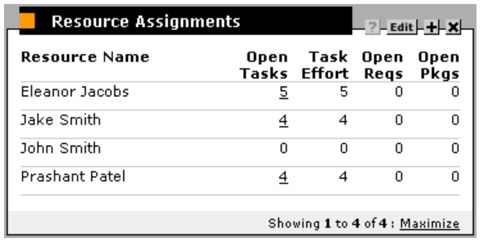
Program Scope Change List

Project	Scope Change #	Severity	CR Level	Status	Description
Sales Upgrade	30415	High	Level 2	New	upgrade sales laptops
Sales Upgrade	30414	High	Level 2	New	upgrade of all systems may be needed

Showing 1 to 2 of 2 : Maximize

Resource Assignments Portlet

The Resource Assignment portlet provides a quick view of the workload for one or more Resources. It displays a filterable group of Resources and the Tasks, Requests, and Packages assigned to each. Clicking on the number of Tasks, Requests, or Packages takes you to a drill-down page from which you can view each Task, Request, or Package in detail. This portlet can be personalized to display results based on specified criteria (Resource Group, Request Type, etc.).



Resource Assignments

Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Eleanor Jacobs	5	5	0	0
Jake Smith	4	4	0	0
John Smith	0	0	0	0
Prashant Patel	4	4	0	0

Showing **1** to **4** of **4** : Maximize

Included Content

The Kintana Program Management Office solution includes a number of pre-configured Template, Request Types, and Workflows. Each of the pre-configured entities provides a model of the Program Management Office system and setup. Each entity is summarized below.

Note

Configurations at your site may be different, depending on the on-site implementation of your specific business needs.

Request Types and Workflow Overview

The following sections provide a quick overview of the Request Types and Workflows that are shipped with Kintana's Program Management Office Solution. Each of the sections lists the Request Type, Action Name (which appears in the Program Management menu) and related Workflow. For more details on the associated field details and process, view the entity details (Request Type and Workflow) in the Kintana Workbench.

PMO - Issue

Issues are a standard Request Type used to log Program-related issues.

Action Name: Submit a Project Issue

Associated Workflow: PMO - Issue Management Workflow

PMO - Program Request

Program Requests are used to request a new Program. Once the Request for the Program has been approved, the Program can be created.

Action Name: Request an Initiative

Associated Workflow: PMO - Program Request Workflow

PMO - Resource Request

Resource Requests are used to request new Resources and submit changes to existing Resources.

Action Name: Request a Project Resource

Associated Workflow: PMO - Resource Request Workflow

PMO - Risk

Risks are used to submit information on risks to a Program.

Action Name: Submit a Project Risk

Associated Workflow: PMO - Risk Management Workflow

PMO - Scope Change Request

Scope Changes are used to request changes in scope for a Program.

Action Name: Request a Project Scope Change

Associated Workflow: PMO - Scope Change Request Workflow

Program Management Office System Template

The Program Management Office solution is shipped with one pre-configured Dashboard template. This template consists of portlets and menu items specifically tailored to the user.

- Program Manager

  The Program Manager template provides an overview of the Programs in an organization. This template includes a menu bar for creating, viewing, managing and reporting on Programs and Program-related Requests. It also includes a number of portlets that provide an overview of the various Program activities in your organization.

Chapter

4

Using the Program Management Office Solution

The following sections provide instructions for the most common Program Management Office user operations. Program Management Office users will operate primarily in the Kintana interface -- creating Programs, Business Objectives, and Program-related Requests. Kintana Power Users can also be involved in managing the Program Management Office processes using the Kintana Workbench. These configuration screens can all be accessed from the specialized menu in the Program Management Office template.

This chapter discusses the following topics:

- *Setting Up Your Dashboard*
- *Working With Business Objectives*
- *Creating a Program*
- *Managing a Program*

Setting Up Your Dashboard

The Kintana Dashboard can be personalized to display information relevant to the logged-on user. Each Kintana user can set up their own Dashboard by performing the following actions:

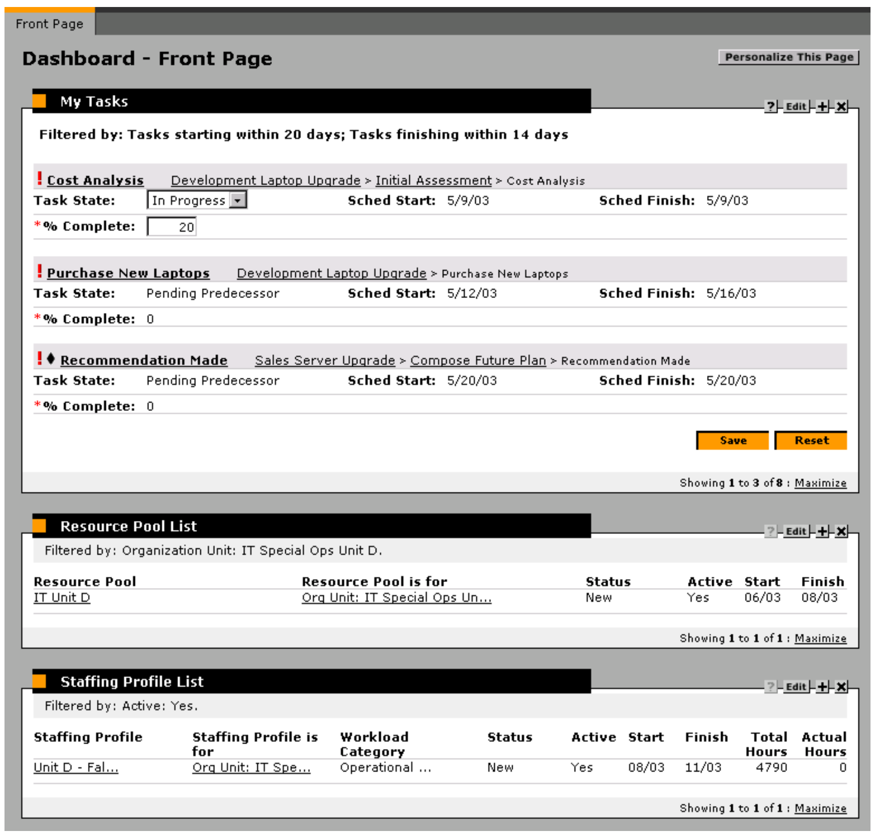
- *Importing a Template*
- *Creating a New Page*
- *Moving Portlets to Different Pages*

Importing a Template

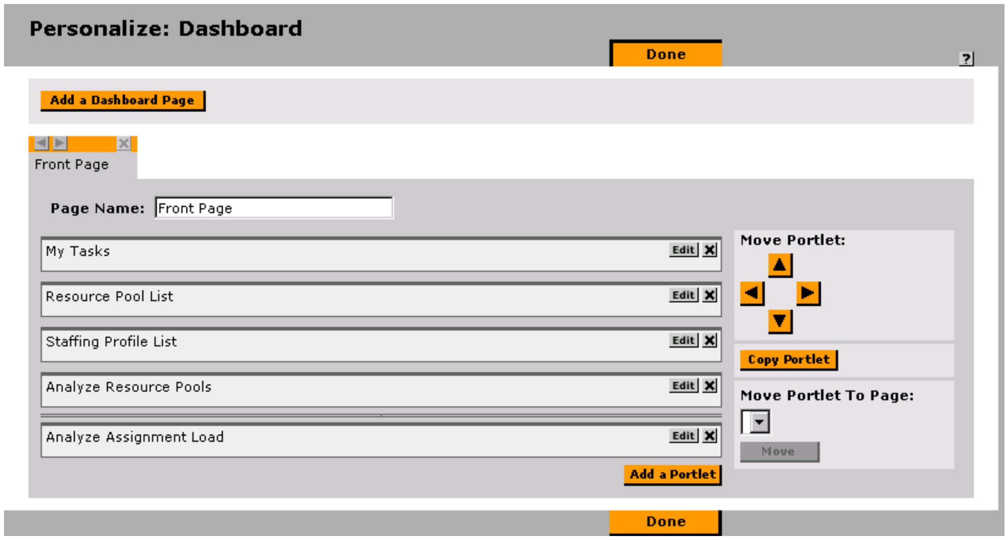
Users can import pre-configured templates onto their Dashboard. The templates consist of default portlets and a specialized menu linking to common activities, configuration screens and reports. The template will appear as a new page on your Kintana Dashboard.

To import a template:

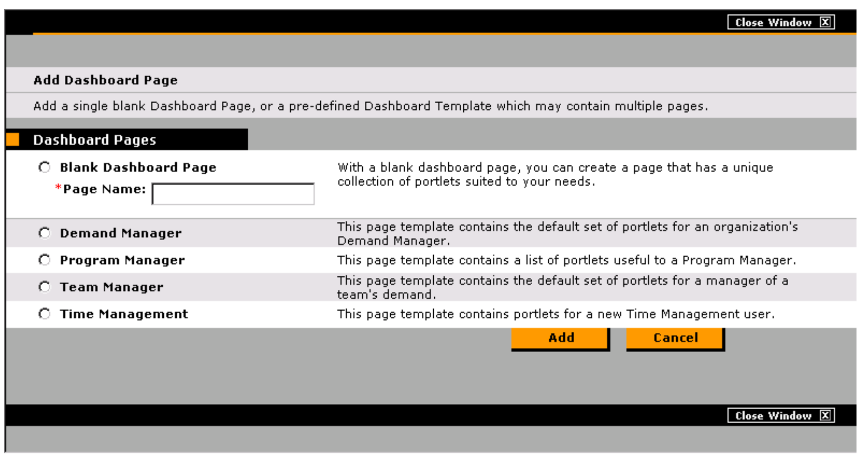
1. Logon to your Kintana Dashboard.



2. Click **PERSONALIZE THIS PAGE**. The PERSONALIZE: DASHBOARD page opens.

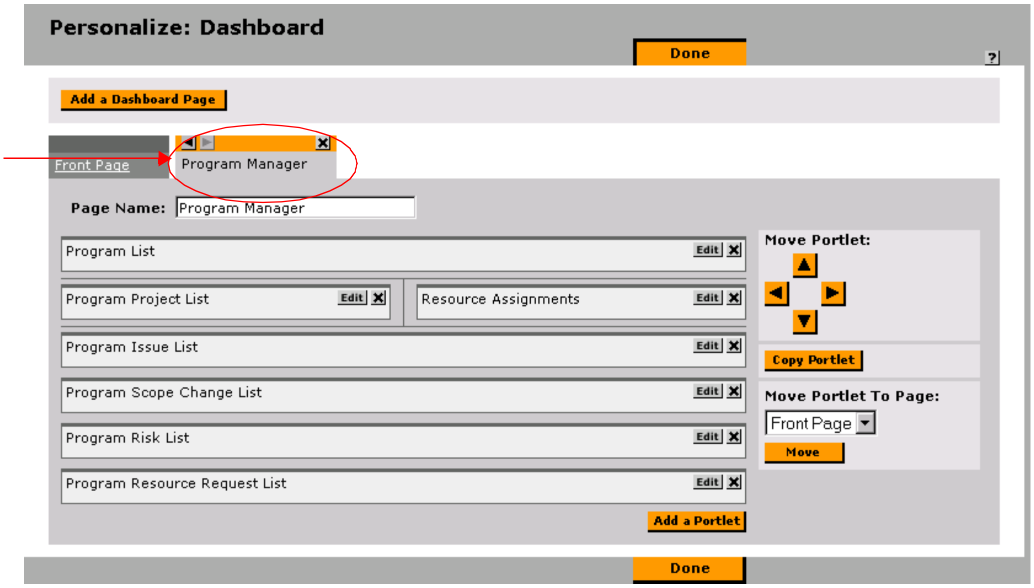


3. Click **Add a Dashboard Page**. The Add Dashboard Page window opens.



4. Select the Program Manager template and click **Add**. The Personalize: Dashboard page reloads with a new Dashboard page appearing to the right of the other pages.

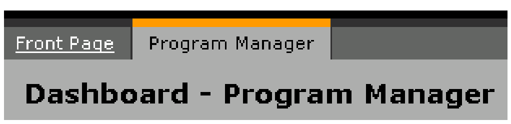
New template is selected.



5. Move the page to the left by clicking the enabled left arrow button above the page name. You can also delete the template by clicking the **x** button.

6. Click **DONE**.

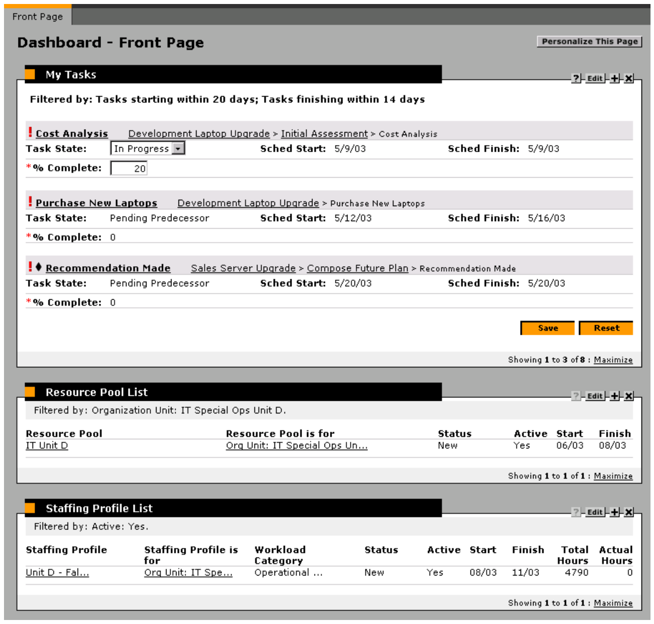
The template is added as a new page on your Dashboard.



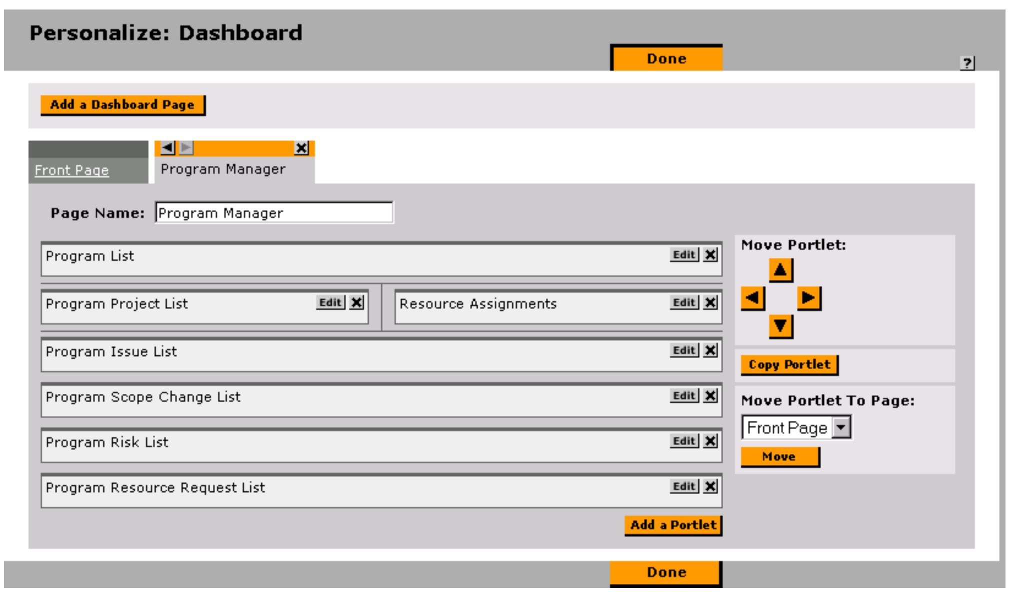
Creating a New Page

You can create a new page on your Kintana Dashboard . You can then add portlets to personalize the page. To add a new page to your Home page:

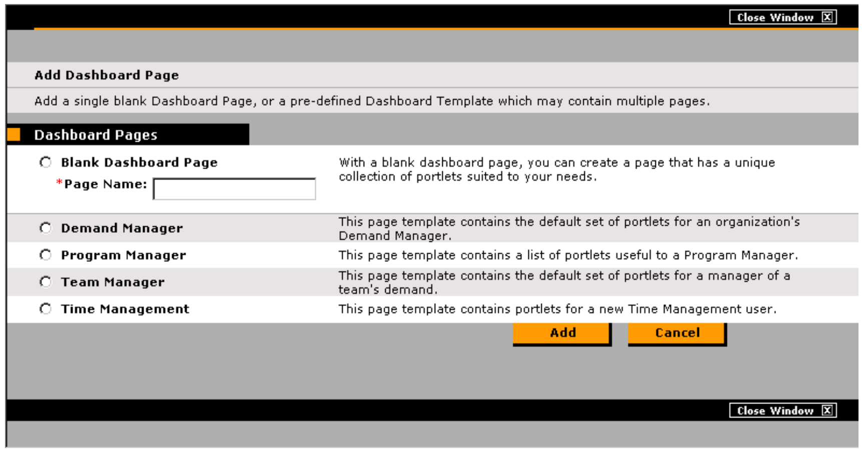
1. Logon to your Kintana Dashboard.



2. Click **PERSONALIZE THIS PAGE**. The PERSONALIZE: DASHBOARD page opens.



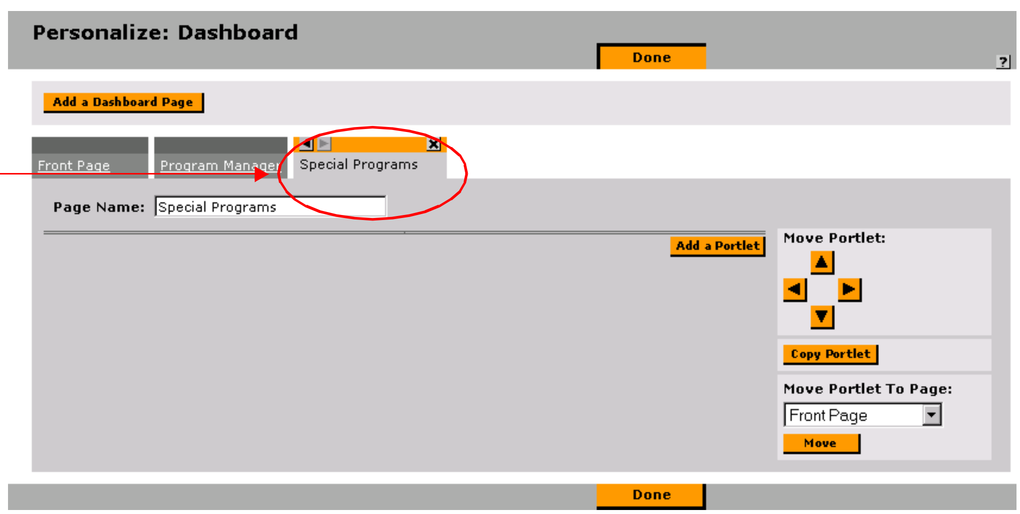
3. Click **ADD A DASHBOARD PAGE**. The ADD DASHBOARD PAGE window opens.



4. Select the Blank Dashboard Page option and enter a Page Name for the new Dashboard Page.

5. Click **Add**. The Personalize: Dashboard page reloads with the new page appearing to the right of the other pages.

New page is created.



6. Add and personalize portlets using the standard Kintana Dashboard processing methods. See the Kintana User Guides for detailed instructions.

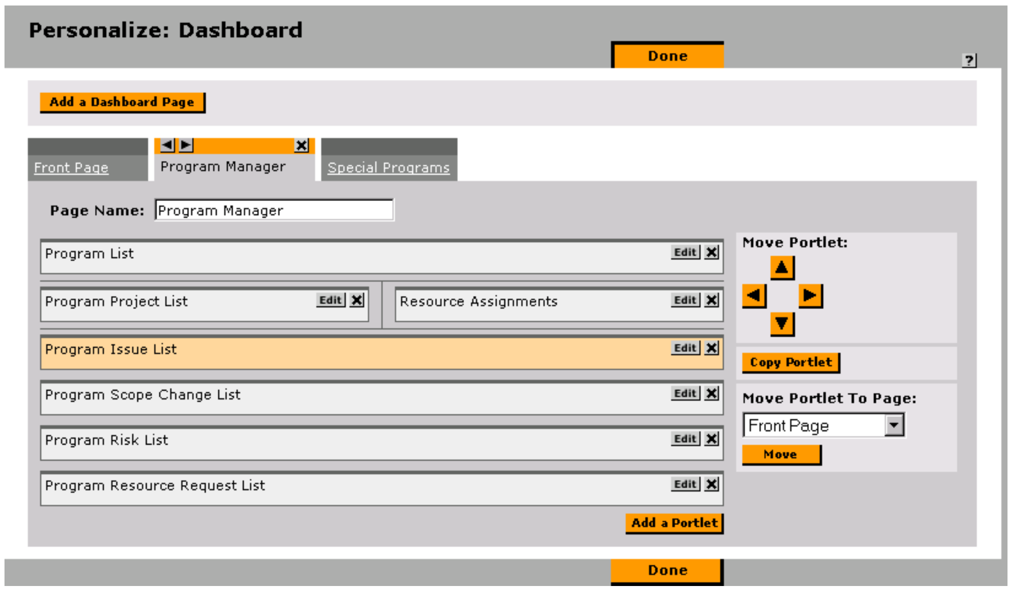
7. Click **Done.**

The new page appears on your Kintana Home page.

Moving Portlets to Different Pages

You can move portlets between the different pages on your Dashboard using the PERSONALIZE: DASHBOARD page. To move a portlet from one page to another:

1. Select the portlet that you want to move to a different page.



2. Select the new page from the MOVE PORTLET TO PAGE drop down list located at the right of the PERSONALIZE: DASHBOARD page.

3. Click **MOVE**.

The portlet is removed from the current page and placed onto the new page.

Working With Business Objectives

Business Objectives provide a means to capture your business goals as discrete entities that can be prioritized and tied to Programs. Business Objectives can be created, modified, and deleted independently of Programs, though Business Objectives that have already been linked to Programs cannot be deleted.

Example

Company A creates a Business Objective, “Reduce order to delivery time.” This Objective is assigned a priority and associated with the Program created to upgrade Company A’s Customer Service system.

The following aspects of Business Objectives are discussed:

- *Creating a Business Objective*
- *Editing a Business Objective*
- *Deleting a Business Objective*

Note: The Validation for the Business Objective STATE (PMO - Business Objective States) can be altered to suit your business needs.

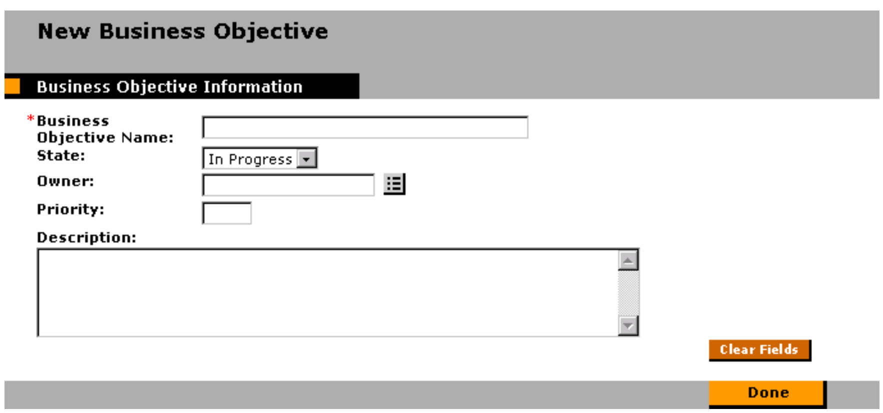
Creating a Business Objective

To create a Business Objective:

1. From the navigation bar, select **PMO -> BUSINESS OBJECTIVES -> CREATE A BUSINESS OBJECTIVE.**

   You can also click **CREATE NEW** in the BUSINESS OBJECTIVES page.

   The NEW BUSINESS OBJECTIVE page opens.



2. Fill in all required fields and any optional fields.

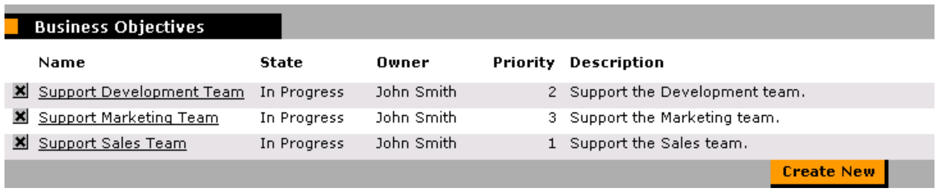
3. Click **DONE.**

   The Business Objective has been created.

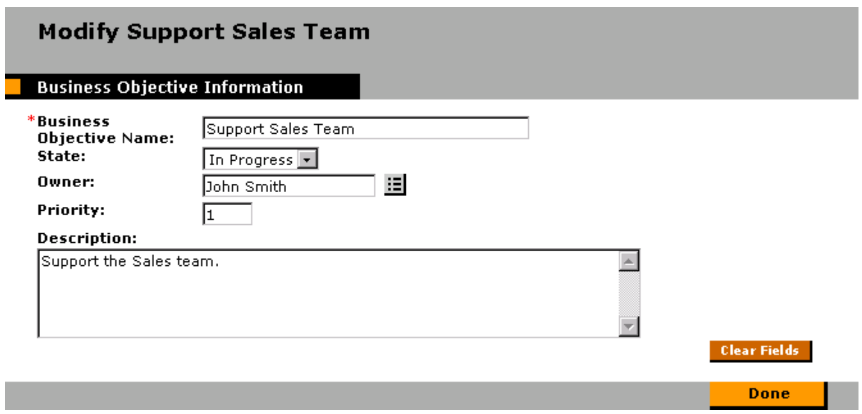
Editing a Business Objective

To edit a Business Objective:

1. From the navigation bar, select **PMO -> Business Objectives -> Manage Business Objectives.** The Business Objectives page opens.



2. Click the name of the Business Objective you wish to edit. The Modify Business Objective page opens.



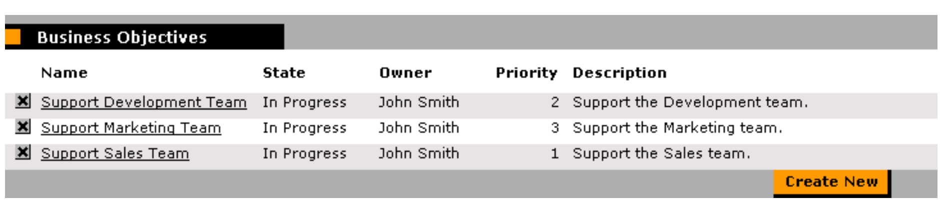
3. Modify any desired fields and click **Done.**

   The changes to the Business Objective have been saved.

Deleting a Business Objective

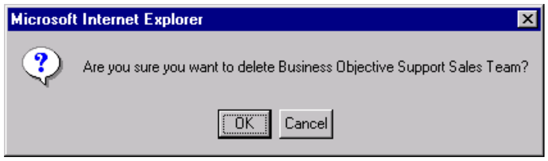
To delete a Business Objective:

1. From the navigation bar, select **PMO -> Business Objectives -> Manage Business Objectives.** The Business Objectives page opens.



2. Click the button next to the Business Objective you wish to delete.

A dialog window appears asking you to confirm whether you want to delete the Business Objective.



3. Click **OK** to delete the Business Objective.

Note: You cannot delete a Business Objective that has been linked to a Program.

Creating a Program

The following sections discuss the processes involved in getting a Program started. Typical Program creation involves requesting a Program before creating one. Once the Program has been created, users can begin to capture Program-related issues. See the following sections for more detailed information:

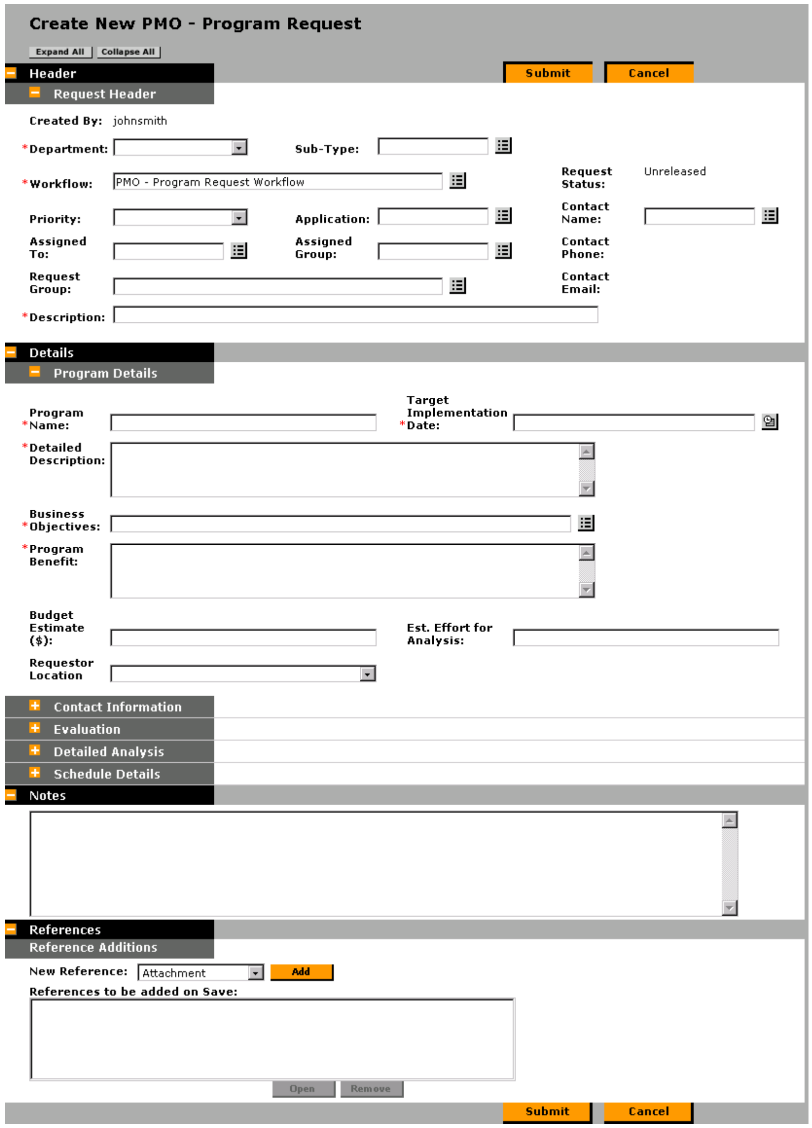
- *Requesting a Program*
- *Creating a Program*
- *Capturing Program Issues*

Requesting a Program

Typical business practice indicates that requesting a Program is a valid and necessary first step to take before actually creating one. This allows you to capture useful information, gather the necessary approvals, and notify the proper individuals before getting the Program started.

In order to take full advantage of the Program Management Office Solution’s capabilities, Kintana recommends that you use the pre-configured Program Request Type and associated Workflow to request a Program. As always, your Kintana Administrator can modify the Request Type and Workflow to suit your business needs.

To request a Program, select **CREATE -> INITIATIVE REQUEST** from the navigation bar. The Request Creation page opens with the Program Request Type loaded.



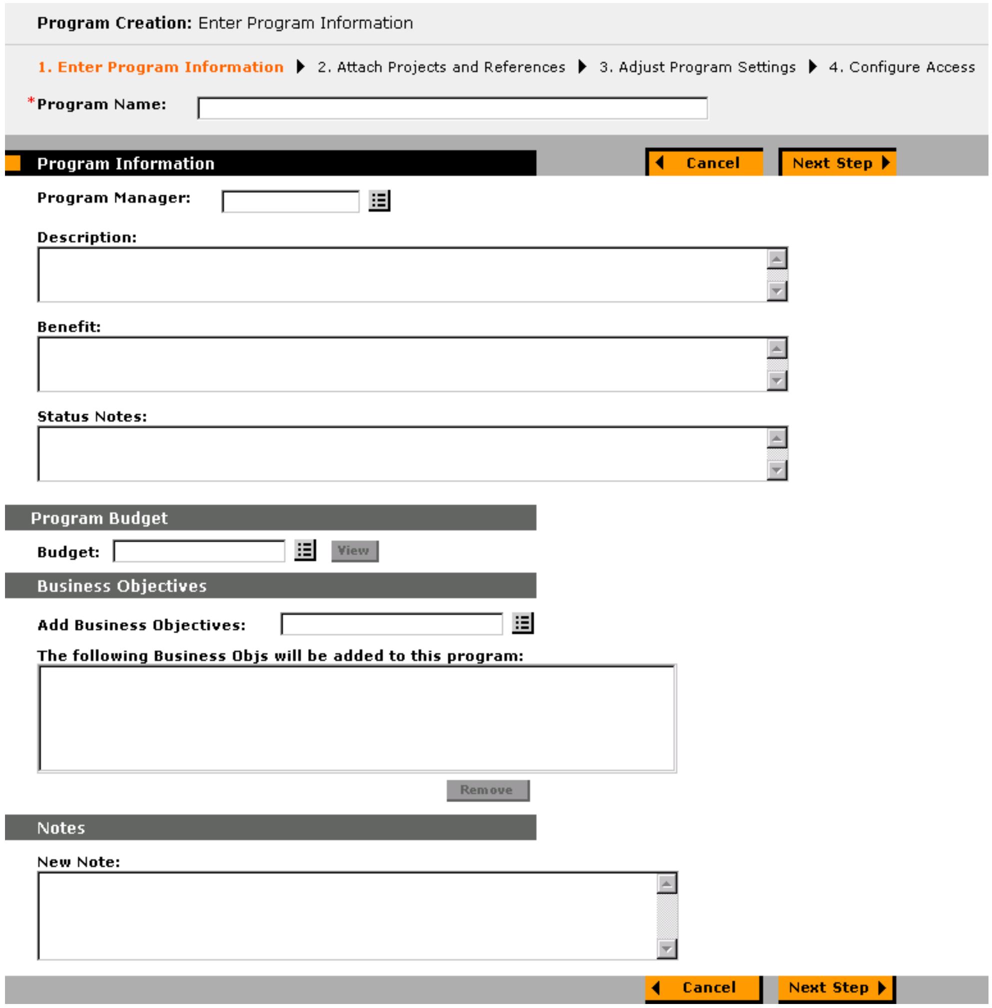
Fill in all required fields and any optional fields, and click **SUBMIT** to submit the Program Request.

Creating a Program

After the Request for a Program has been approved, the Program itself can be created. This process involves entering Program-specific information along with associating Business Objectives, Projects, and References, as well as configuring Program Summary Condition Indicators.

To create a Program:

1. Select **CREATE -> PROGRAM** or **PMO -> CREATE A PROGRAM** from the navigation bar. The ENTER PROGRAM INFORMATION page opens.



2. Fill in all required fields and any optional fields in the PROGRAM INFORMATION section.

3. Attach any related Business Objectives, Projects, and References to the Program, as well as configure the Program's Summary Condition Indicators. The following sections provide more detailed information on these aspects of creating a Program:

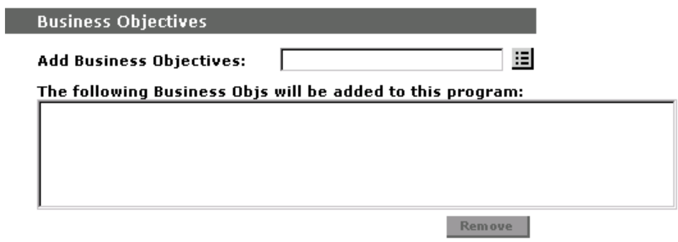
   - *Selecting Business Objectives*
   - *Adding Projects*
   - *Adding References*

- *Configuring Indicator Settings*
- *Configuring Program Access*

Selecting Business Objectives

To associate Business Objectives with a Program:

1. In the ENTER PROGRAM INFORMATION page, scroll down to the BUSINESS OBJECTIVES section.

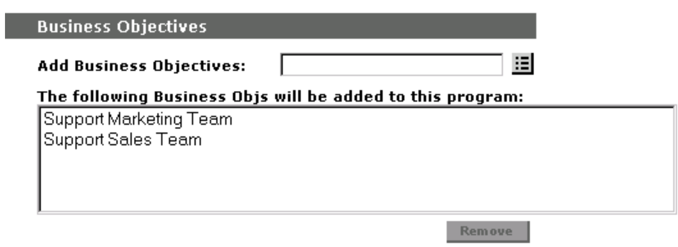


2. Select any Business Objectives you wish to attach to the Program from the ADD BUSINESS OBJECTIVES multi-select auto-complete field.

Note

> Only Business Objectives in the **IN PROGRESS** state can be associated with a Program.

3. When the multi-select auto-complete window closes, the selected Business Objectives appear in the THE FOLLOWING BUSINESS OBJS WILL BE ADDED TO THIS PROGRAM list on the ENTER PROGRAM INFORMATION page. *The Business Objectives have not been added yet*.



   Click **REMOVE** to remove any unwanted Business Objectives from the list.

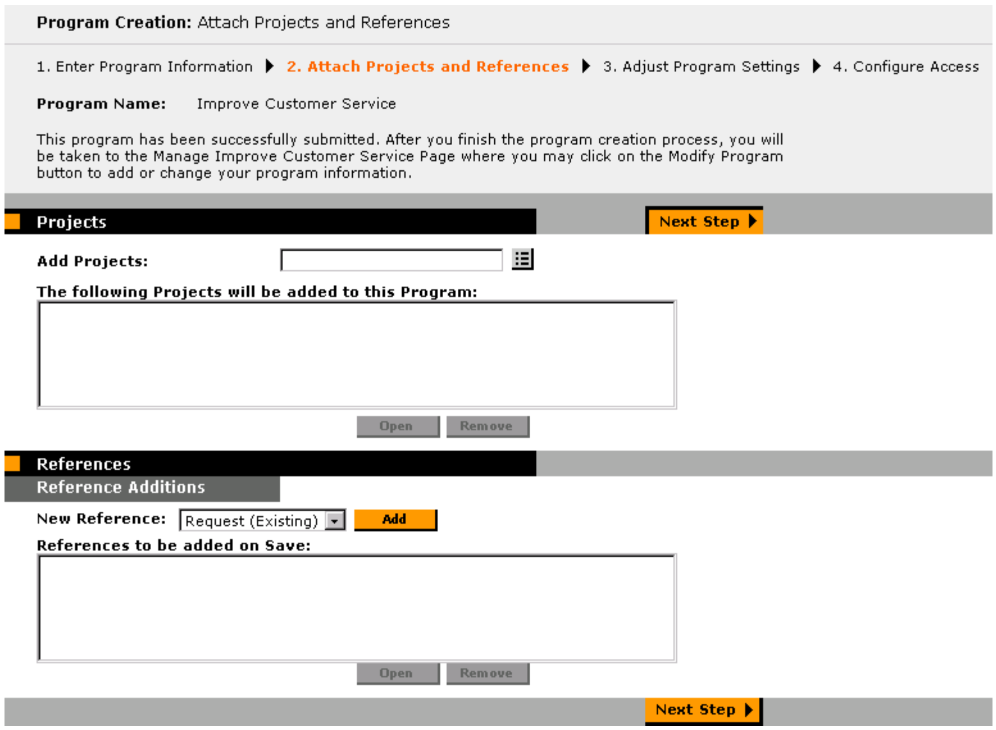
4. Click **NEXT STEP** to proceed to the next step in Program creation. The ATTACH PROJECTS AND REFERENCES page opens.

   The Business Objectives have been added to the Program.

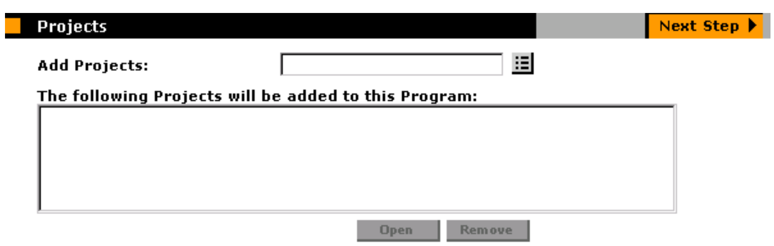
Adding Projects

To associate Projects with a Program:

1. You should have already completed the *Creating a Program* and *Selecting Business Objectives* steps, bringing you to the ATTACH PROJECTS AND REFERENCES page.



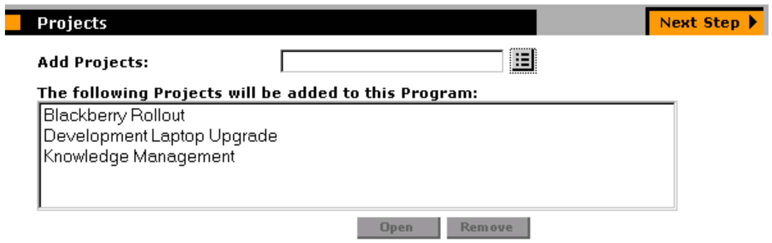
2. Scroll down to the PROJECTS section.



3. Select any Projects you wish to attach to the Program from the ADD PROJECTS multi-select auto-complete field.

4. When the multi-select auto-complete window closes, the selected Projects appear in the THE FOLLOWING PROJECTS WILL BE ADDED TO THIS PROGRAM list on

the Attach Projects and References page. *The Projects have not been added yet*.



Click **Remove** to remove any unwanted Projects from the list.

5. Add any desired References to the Program (see *Adding References* for more detailed information) if you haven't done so already.

6. Click **Next Step** to proceed to the next step in Program creation. The Adjust Program Settings page opens.

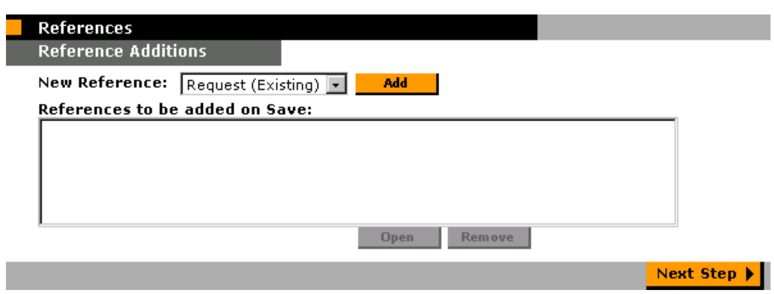
   The Projects (and References) have been added to the Program.

Adding References

The standard set of References (Attachments, Packages, Projects, Tasks, New Requests, Existing Requests, and URLs) can be added to a Program, with the standard set of Reference relationships. See any of the Kintana Product Suite User Guides for more information on References and Reference relationships.

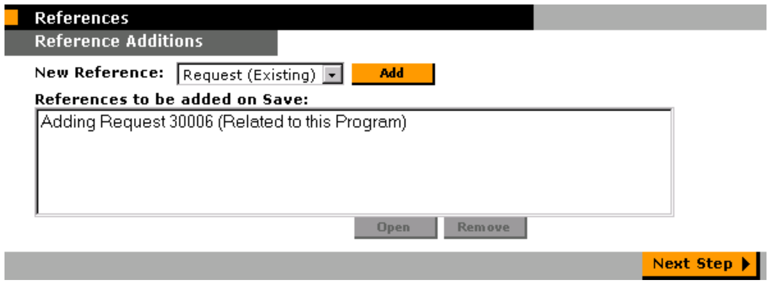
To add References to a Program:

1. You should have already completed the *Creating a Program* and *Selecting Business Objectives* steps, bringing you to the Attach Projects and References page. Scroll down to the References section.



2. Select any References you wish to attach to the Program from the New References multi-select auto-complete field.

3. Click **Add**. The selected References appear in the References to be added on Save list on the Attach Projects and References page. *The References have not been added yet.*



   Click **Remove** to remove any unwanted References from the list.

4. Add any desired Projects to the Program (see *Adding Projects* for more detailed information) if you haven't done so already.

5. Click **Next Step** to proceed to the next step in Program creation. The Adjust Program Settings page opens.

   The References (and Projects) have been added to the Program.

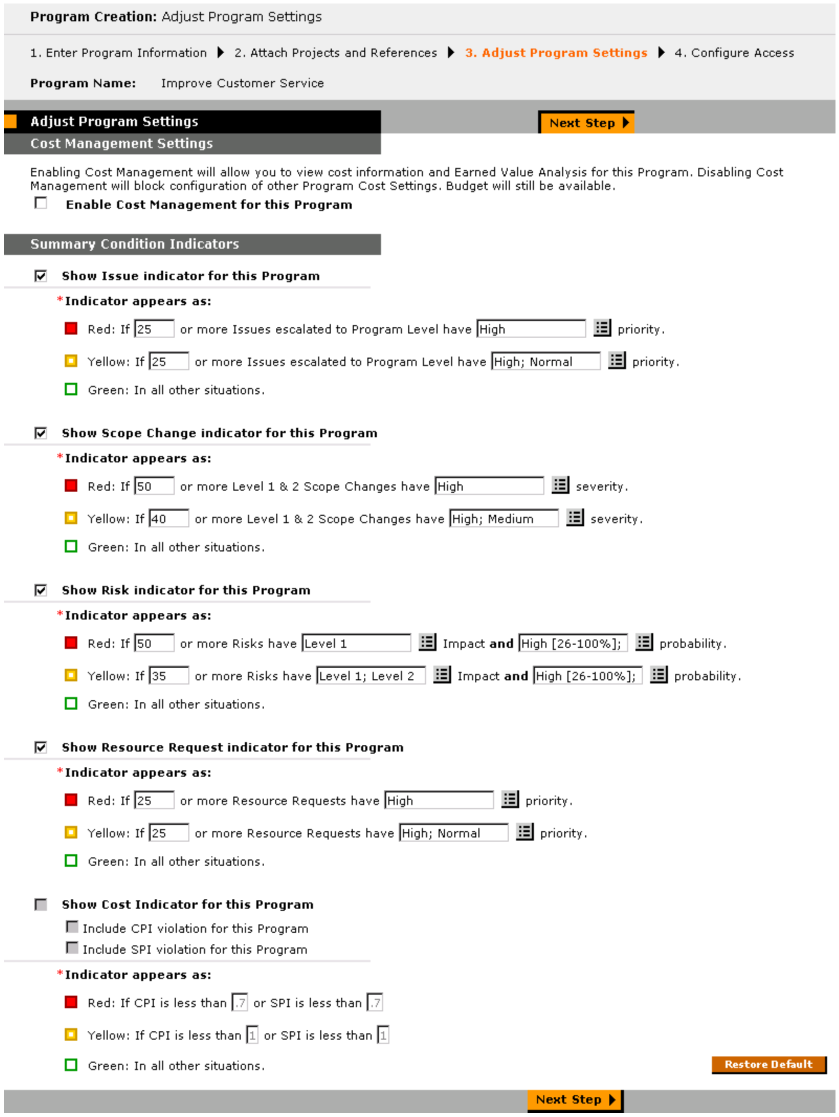
Configuring Indicator Settings

Summary Condition Indicators are a useful way to show the at-a-glance status of a Program's Issues, Scope Changes, Risks, and Resource Requests, as well as Cost data if Cost Management has been enabled for the Program. These Indicators appear as colored icons in the Program List portlet and Manage Program page.

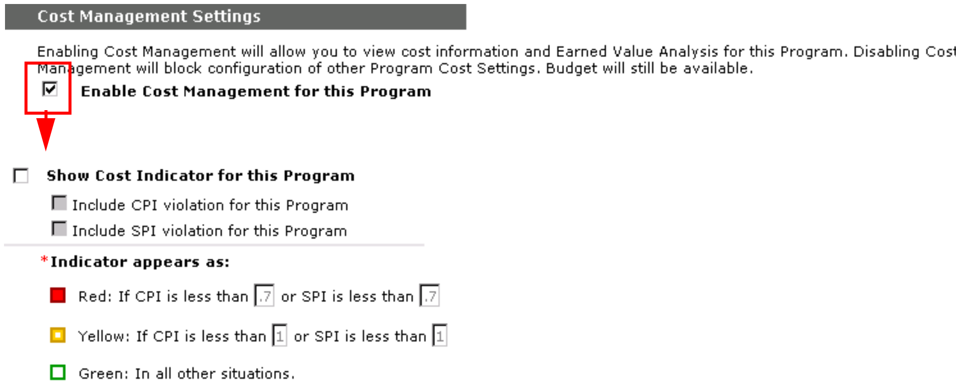
Each Program Management Office Request Type has its own Summary Condition Indicator, which can be configured independently of the others.

To configure Summary Condition Indicators for a Program:

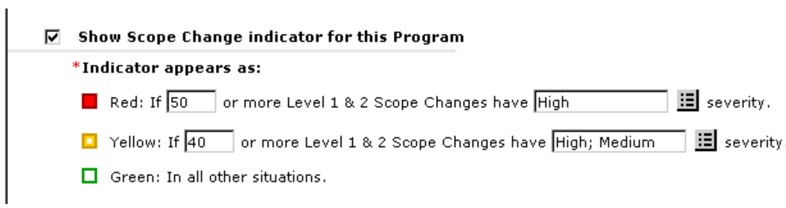
1. You should have already completed the *Creating a Program*, *Selecting Business Objectives*, *Adding Projects*, and *Adding References* steps, bringing you to the Adjust Program Settings page.



2. Decide whether to enable Cost Management for the Program by selecting the ENABLE COST MANAGEMENT FOR THIS PROGRAM check box. Enabling Cost Management activates the Cost Indicator settings at the bottom of the page.



3. Activate the Summary Condition Indicator for the desired Program Management Office Request Type by selecting the SHOW (REQUEST TYPE) INDICATOR FOR THIS PROGRAM box.



4. Specify the triggering values for the Indicator to turn red by entering a number and Request field state in the appropriate fields.

5. Specify the triggering values for the Indicator to turn yellow by entering a number and Request field state in the appropriate fields.

   To restore the default values for each Indicator, click **RESTORE DEFAULTS**.

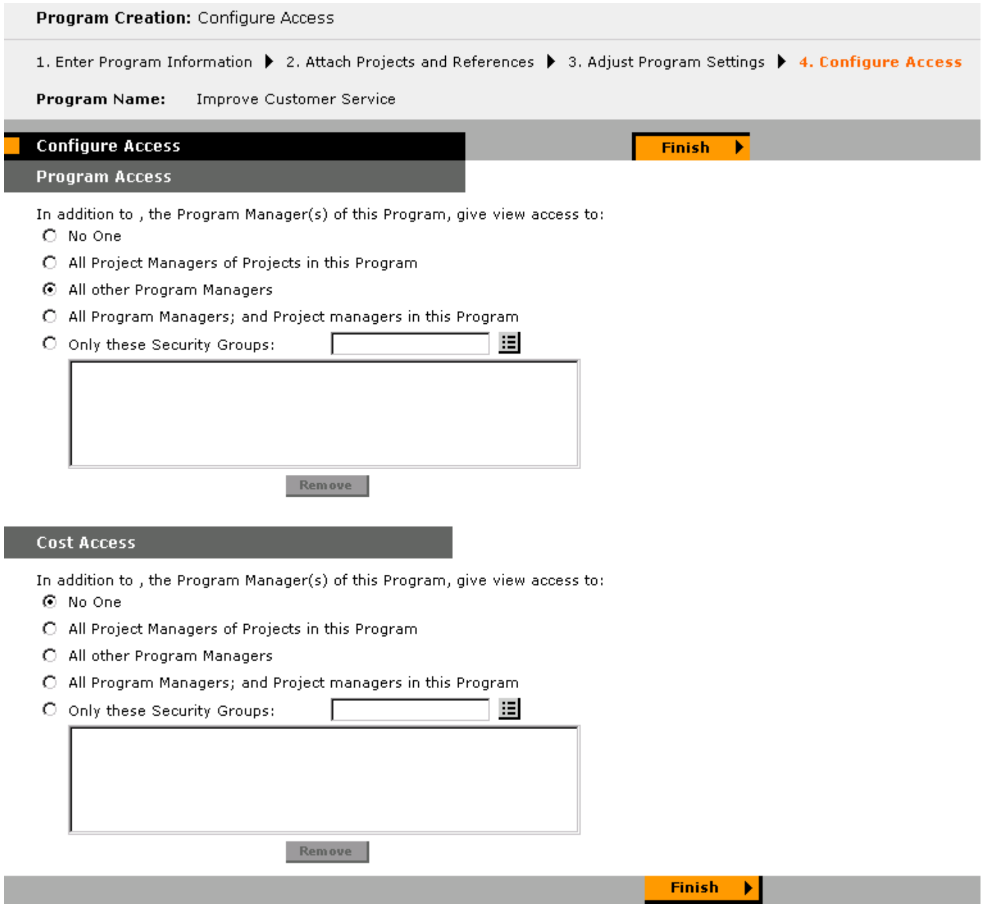
6. Click **NEXT STEP** to proceed to the next step in Program creation. The CONFIGURE ACCESS page opens.

Configuring Program Access

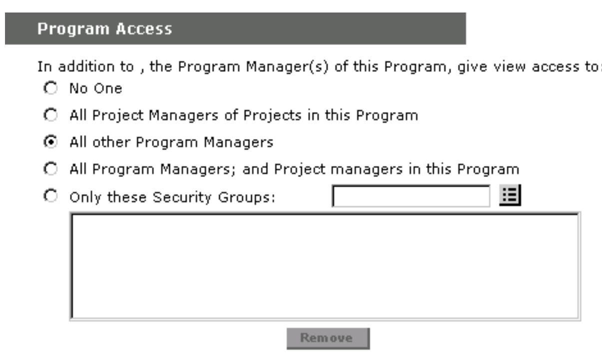
You can control which users can view the Program, as well as the users who can view the Program's Cost information independently. Access is configured on a per-Program basis.

To configure access to the Program you are creating:

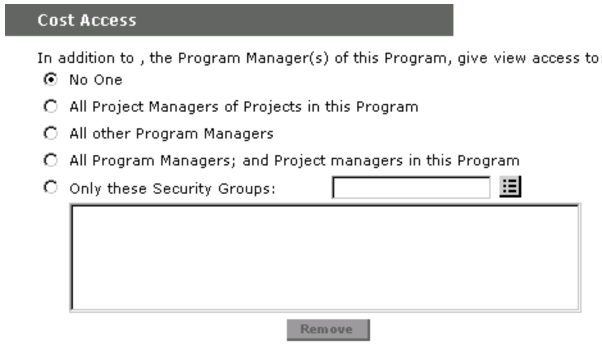
1. You should have already completed the *Creating a Program*, *Selecting Business Objectives*, *Adding Projects*, *Adding References*, and *Configuring Indicator Settings* steps, bringing you to the CONFIGURE ACCESS page.



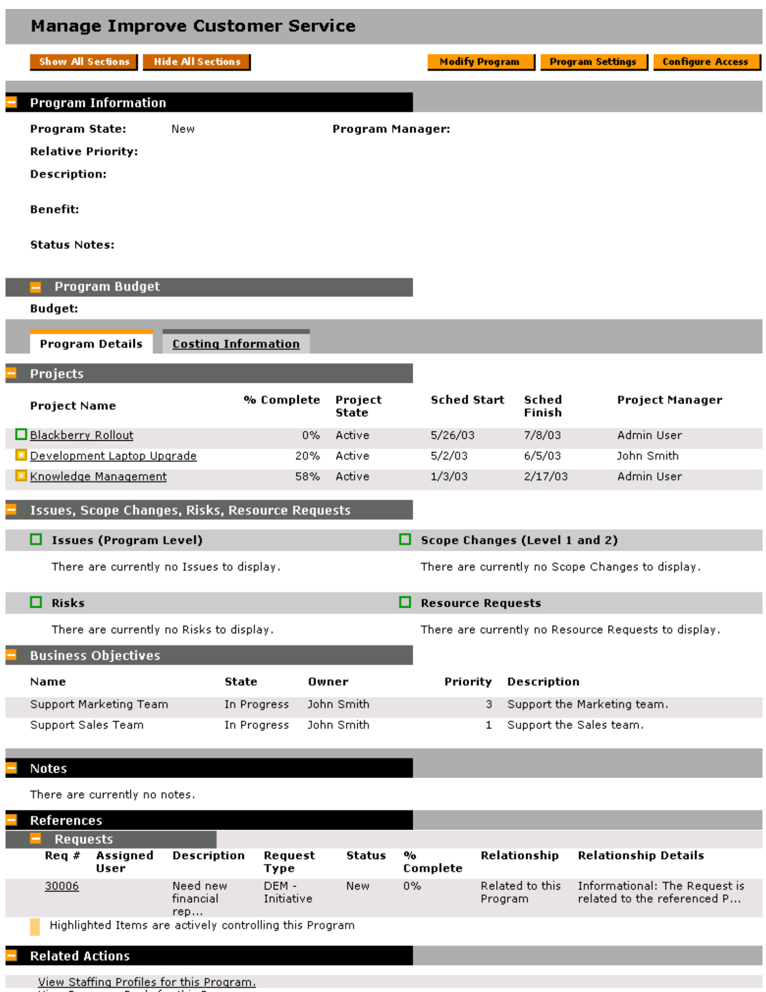
2. Select the set of users who can view the Program. To specify a list of Security Groups, use the ONLY THESE SECURITY GROUPS multi-select auto-complete list.



3. Select the set of users who can view the Program's Cost data. To specify a list of Security Groups, use the ONLY THESE SECURITY GROUPS multi-select auto-complete list.



4. Click **Finish**. The Manage Program page opens, displaying the Program you created.



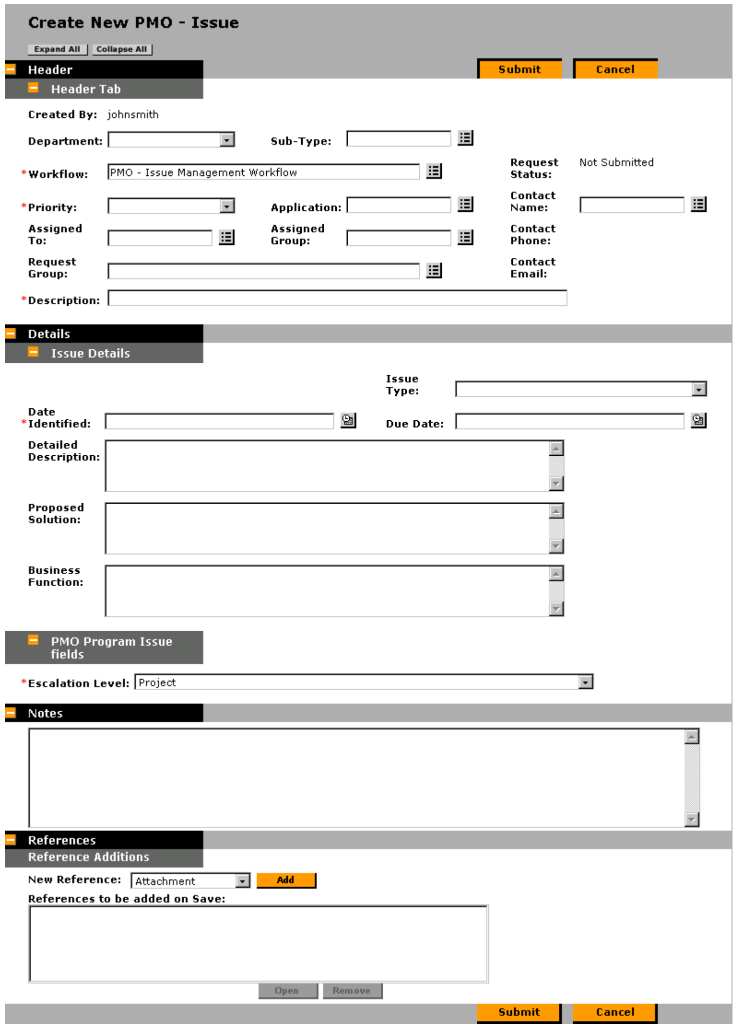
Capturing Program Issues

Once a Program has been created, users can begin to capture and document Program-related items by submitting Issues, Resource Requests, Risks, and Scope Changes.

To submit a Program-related Request:

1. From the navigation bar's **CREATE** menu group, select one of the following:
   - **PROJECT ISSUE**
   - **PROJECT RESOURCE REQUEST**
   - **PROJECT RISK**
   - **PROJECT SCOPE CHANGE**

   Or from the **PMO** menu group, select one of the following:
   - **ISSUES -> SUBMIT A PROJECT ISSUE**
   - **RESOURCE REQUESTS -> REQUEST A PROJECT RESOURCE**
   - **RISKS -> SUBMIT A PROJECT RISK**
   - **SCOPE CHANGES -> REQUEST A PROJECT SCOPE CHANGE**
2. The Request Creation page opens, with the appropriate Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **Submit** to submit the Request.

   The Issue, Resource Request, Risk, or Scope Change Request will begin moving along its pre-defined Workflow toward resolution.

Managing a Program

During a Program's life cycle, many events can occur.

- Risks may develop.
- Program Project scope could change.

- Resources might be needed.
- Issues may arise.
- Associated Projects will finish, or might stall, or be canceled altogether.
- Business Objectives could change or become obsolete.
- Any References may close out or otherwise change.

The following topics discuss using the Program Management Office Solution to handle these changes in more detail:

- *Working With Issues*
- *Working With Resource Requests*
- *Working With Risks*
- *Working With Scope Changes*
- *Working With Programs*

Working With Issues

Occasionally, Program-related concerns may surface that need to be dealt with. Issues introduce a framework for such concerns to be identified and resolved in the form of Kintana Create Requests that can be tracked and reported on. The following sections discuss working with Issues in more detail:

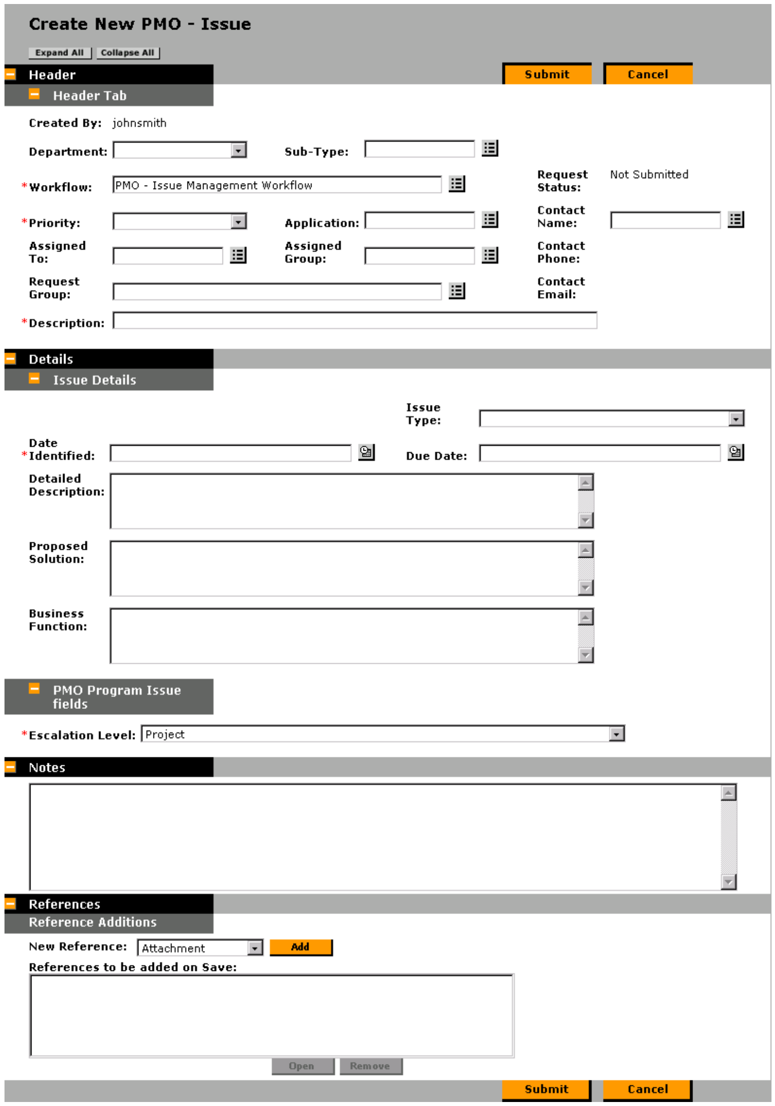
- *Submitting an Issue*
- *Managing Issues*

Submitting an Issue

To submit an Issue:

1. Select **CREATE -> PROJECT ISSUE** or **PMO -> ISSUES -> SUBMIT A PROJECT ISSUE** from the navigation bar.

2. The Request Creation page opens with the Issue Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **SUBMIT** to submit the Request.

   The Issue begins moving along its pre-defined Workflow toward resolution.

Note

In order to show up in Program Management portlets, the Request must be Referenced to a Project associated with a Program or attached as a Reference directly.

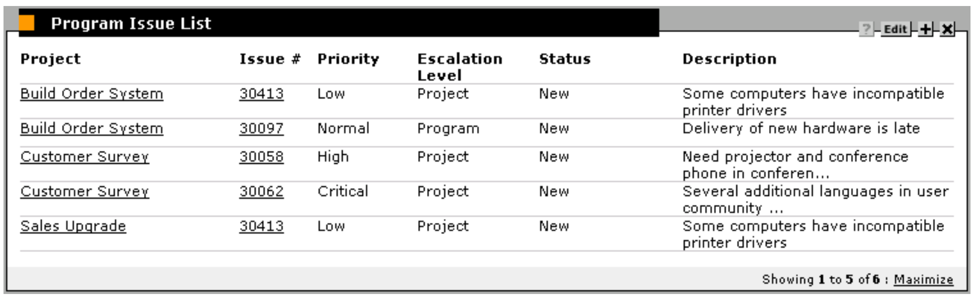
Managing Issues

There are two places to obtain a convenient overview of Issues for a Program:

- *Program Issue List Portlet*
- *Manage Program Page: Issues*

Program Issue List Portlet

The Program Issue List portlet lists all the Issues associated with a selected Program.



Project	Issue #	Priority	Escalation Level	Status	Description
Build Order System	30413	Low	Project	New	Some computers have incompatible printer drivers
Build Order System	30097	Normal	Program	New	Delivery of new hardware is late
Customer Survey	30058	High	Project	New	Need projector and conference phone in conferen...
Customer Survey	30062	Critical	Project	New	Several additional languages in user community ...
Sales Upgrade	30413	Low	Project	New	Some computers have incompatible printer drivers

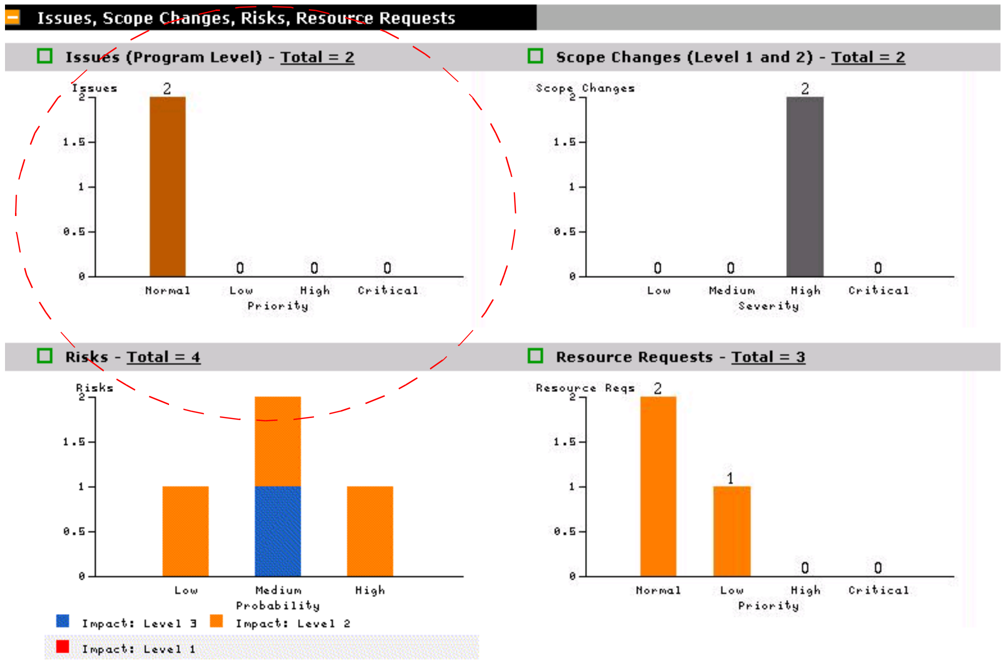
Figure 4-1 Program Issue List portlet

This portlet can have multiple instances for viewing different Programs and their associated Issues. The Program Issue List portlet can be personalized to display Issues based on specified criteria (Status, Priority, Escalation Level, etc.). You can also specify how the Issues are grouped. Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.

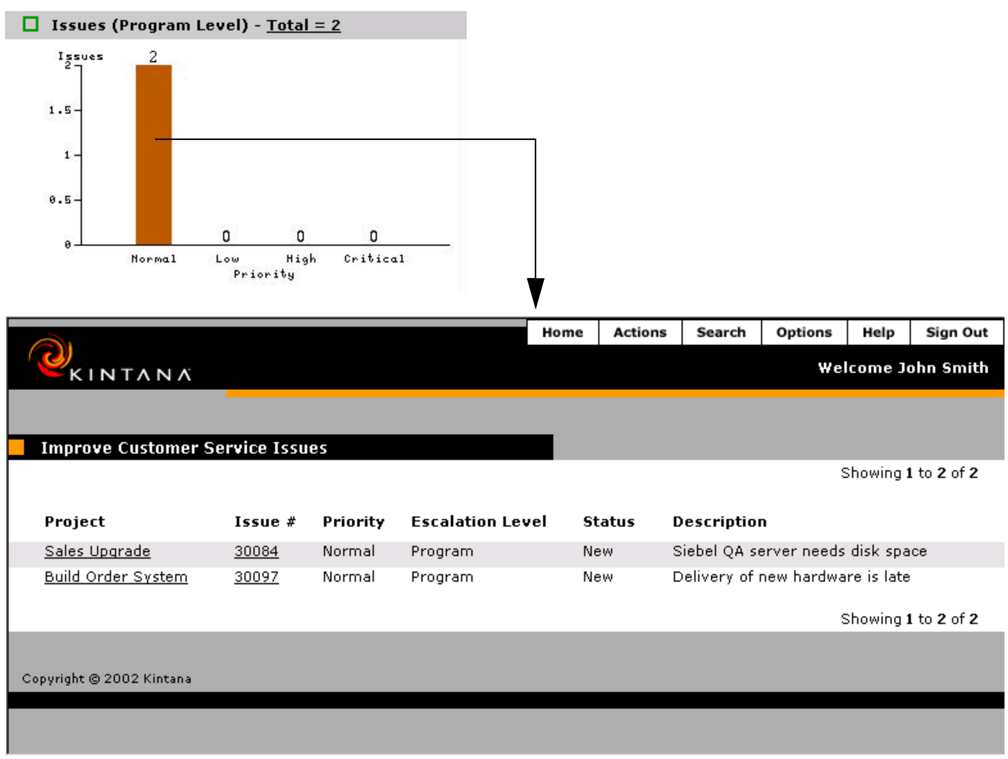
- If the Issue is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Issue # to see the Issue Detail page.

Manage Program Page: Issues

The Manage Program page has a bar chart summarizing the Issues submitted for the Program.



Click on the bar for any Issue group to go to the drill-down page listing all the Issues in that particular group.



Project	Issue #	Priority	Escalation Level	Status	Description
Sales Upgrade	30084	Normal	Program	New	Siebel QA server needs disk space
Build Order System	30097	Normal	Program	New	Delivery of new hardware is late

Showing 1 to 2 of 2

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Click on the Issue # to see the Issue Detail page.

Working With Resource Requests

A Program Manager may need to ask for additional resources from other departments from time to time. The Program Manager may also want to view current resource allocations to determine Program areas that are overloaded or understaffed. Resource Requests and Program Management Office portlets help the Program Manager to accomplish these tasks more easily and efficiently. The following sections discuss working with Resources and Resource Requests in more detail:

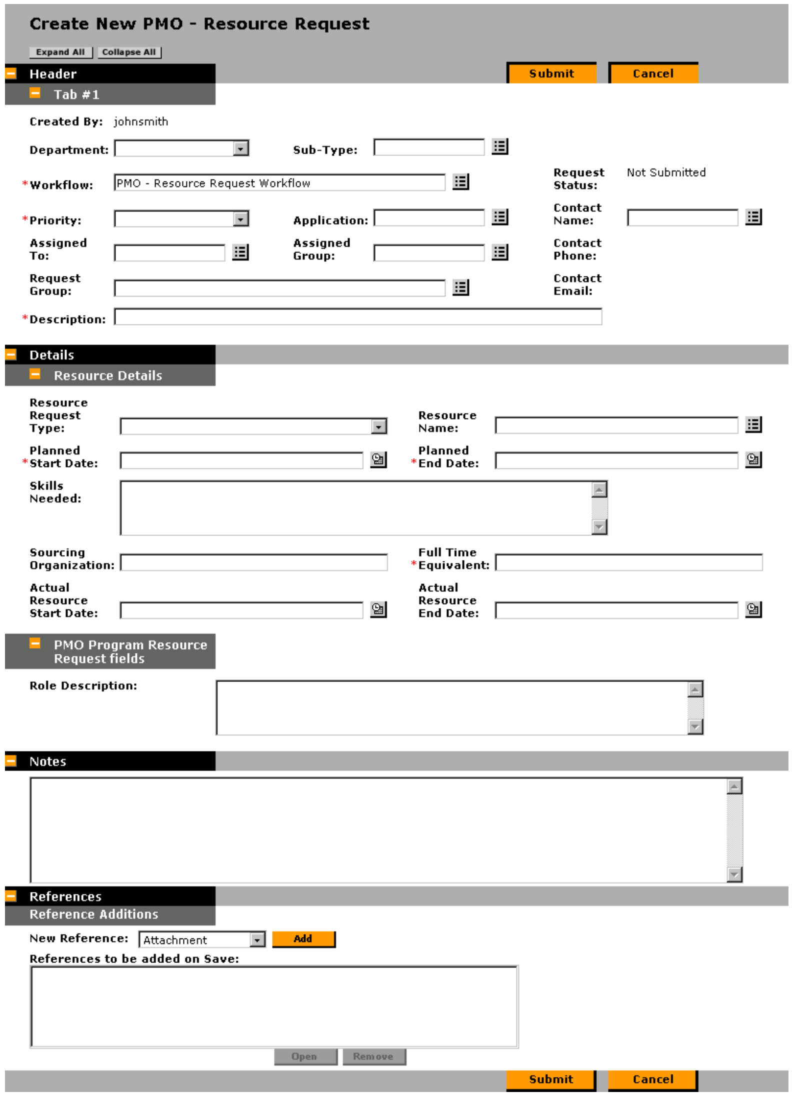
- *Requesting a Resource*
- *Viewing Resource Assignments*
- *Managing Resource Requests*

Requesting a Resource

To submit a Resource Request:

1. Select **CREATE -> PROJECT RESOURCE REQUEST** or **PMO -> RESOURCE REQUESTS-> REQUEST A PROJECT RESOURCE** from the navigation bar.

2. The Request Creation page opens with the Resource Request Request Type loaded.



3. Fill in all required fields and any optional fields.

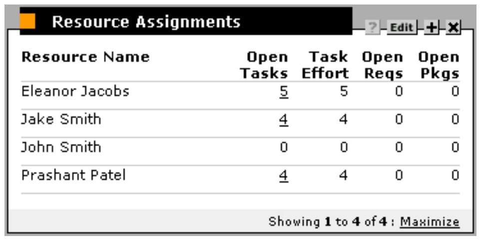
4. Click **SUBMIT** to submit the Request.

   The Resource Request begins moving along its pre-defined Workflow toward resolution.

> **Note:** In order to show up in Program Management portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

Viewing Resource Assignments

The Resource Assignment portlet provides a quick view of the workload for Resources or groups of Resources and the Tasks, Requests, and Packages assigned to each.



Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Eleanor Jacobs	5	5	0	0
Jake Smith	4	4	0	0
John Smith	0	0	0	0
Prashant Patel	4	4	0	0

Showing 1 to 4 of 4 : Maximize

Figure 4-2 Resource Assignment portlet

You can choose to display Resources based on:

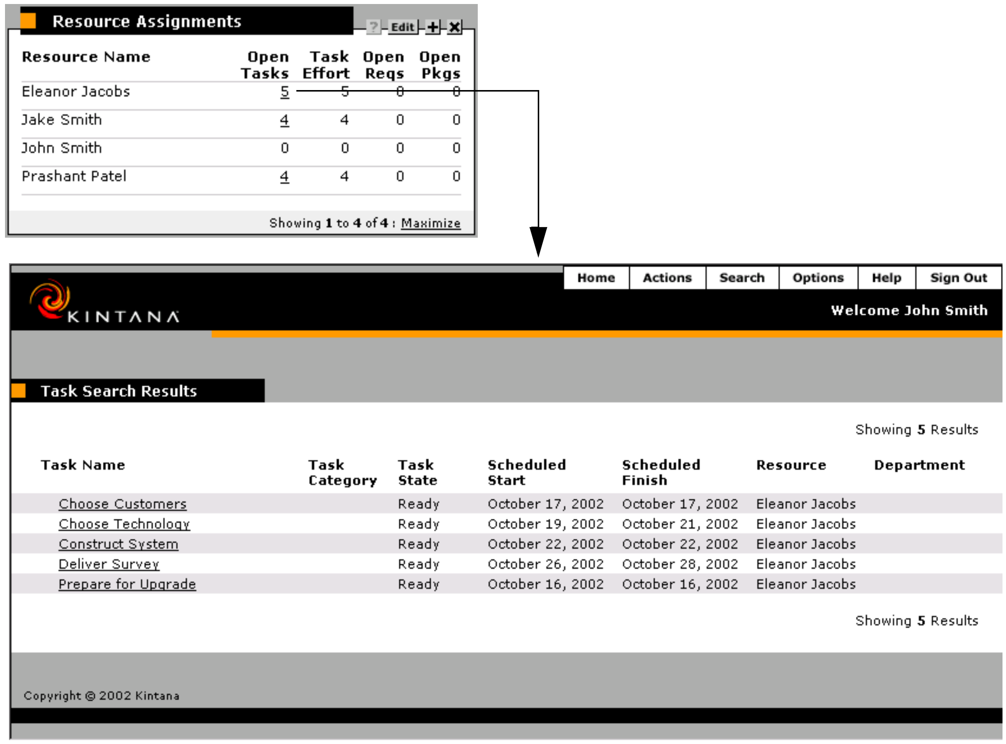
- Resource Group
- Project Team
- Resource Name

Additionally, you can filter the Request Types displayed in the portlet.

Example

> You can personalize the portlet to display members of a Resource Group and the number of Bugs assigned to each.

Click on the number of Tasks, Requests, or Packages to go to the Task, Request, or Package drill-down page.



Resource Assignments

Resource Name	Open Tasks	Task Effort	Open Reqs	Open Pkgs
Eleanor Jacobs	5	5	0	0
Jake Smith	4	4	0	0
John Smith	0	0	0	0
Prashant Patel	4	4	0	0

Showing 1 to 4 of 4 : Maximize

Home | Actions | Search | Options | Help | Sign Out

KINTANA

Welcome John Smith

Task Search Results

Showing 5 Results

Task Name	Task Category	Task State	Scheduled Start	Scheduled Finish	Resource	Department
Choose Customers		Ready	October 17, 2002	October 17, 2002	Eleanor Jacobs	
Choose Technology		Ready	October 19, 2002	October 21, 2002	Eleanor Jacobs	
Construct System		Ready	October 22, 2002	October 22, 2002	Eleanor Jacobs	
Deliver Survey		Ready	October 26, 2002	October 28, 2002	Eleanor Jacobs	
Prepare for Upgrade		Ready	October 16, 2002	October 16, 2002	Eleanor Jacobs	

Showing 5 Results

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Click on the Task Name, Request #, or Package # to go to the Task, Request, or Package Detail page.

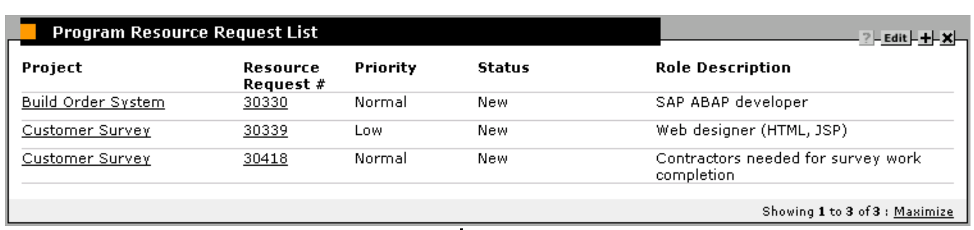
Managing Resource Requests

There are two places to obtain a convenient overview of Resource Requests for a Program:

- *Program Resource Request List Portlet*
- *Manage Program Page: Resource Requests*

Program Resource Request List Portlet

The Program Resource Request List portlet lists all the Resource Requests associated with a particular Program.



Program Resource Request List

Project	Resource Request #	Priority	Status	Role Description
Build Order System	30330	Normal	New	SAP ABAP developer
Customer Survey	30339	Low	New	Web designer (HTML, JSP)
Customer Survey	30418	Normal	New	Contractors needed for survey work completion

Showing 1 to 3 of 3 : Maximize

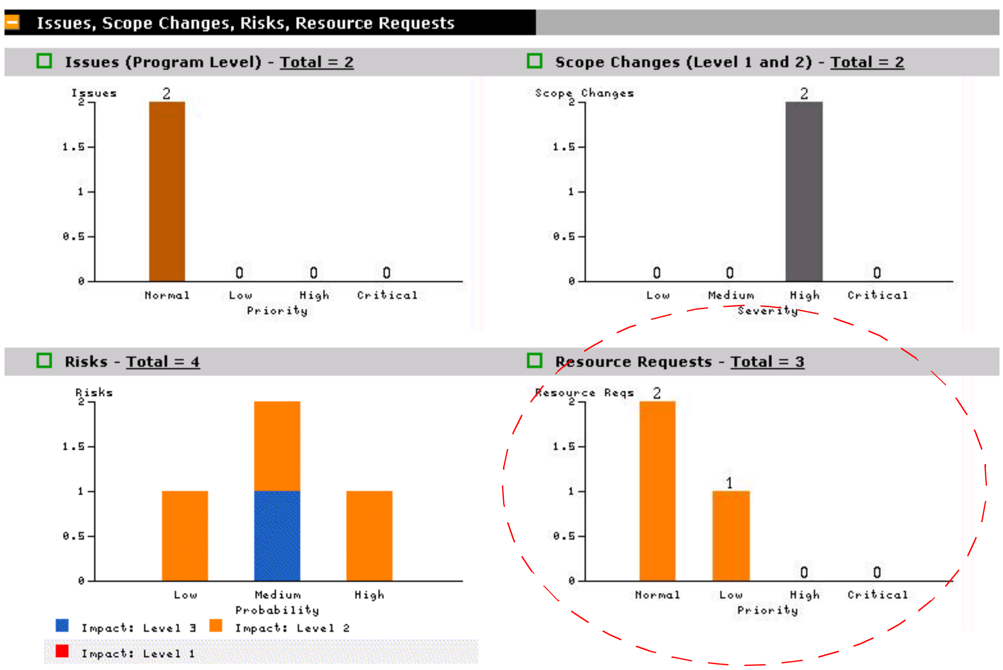
Figure 4-3 Resource Request List portlet

This portlet can have multiple instances for viewing different Programs and their associated Resource Requests. The Program Resource Request List portlet can be personalized to display Resource Requests based on specified criteria (Created in the last X days, Status, Priority, etc.). You can also specify how the Resource Requests are grouped. Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.

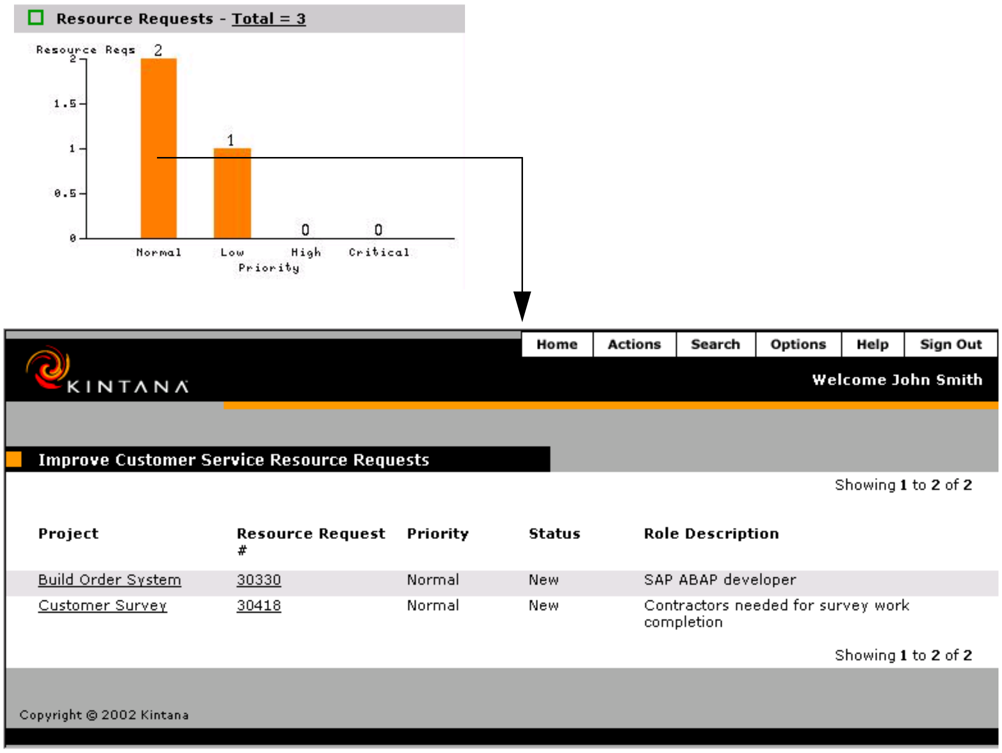
- If the Resource Request is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Resource Request # to see the Resource Request Detail page.

Manage Program Page: Resource Requests

The Manage Program page has a bar chart summarizing the Resource Requests submitted for the Program.



Click on the bar for any Resource Request group to go to the drill-down page listing all the Resource Requests in that particular group.



Click on the Resource Request # to see the Resource Request Detail page.

Working With Risks

Risks to a Program might be identified during its life cycle. The Program Management Office Risk Request Type is a way to identify these Risks, collect key information about them (impact level, probability of occurring), and deal with them in a timely manner. The following sections discuss working with Risks in more detail:

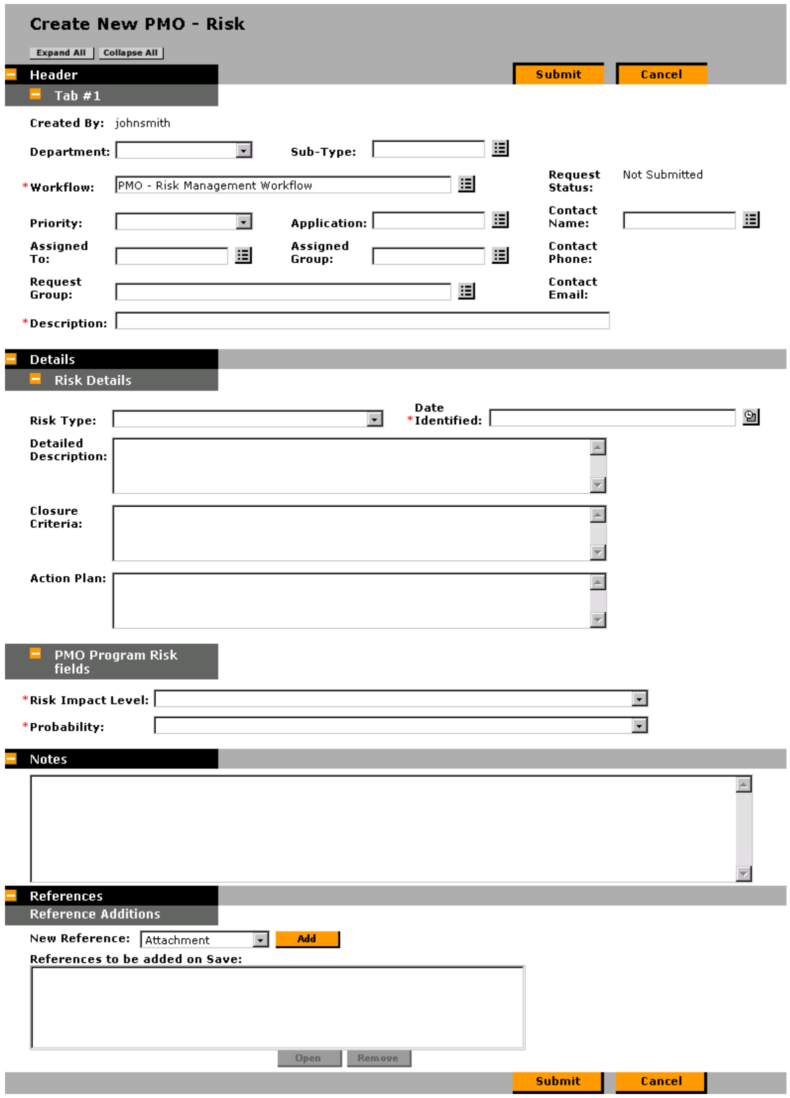
- *Submitting a Risk*
- *Managing Risks*

Submitting a Risk

To submit a Risk:

1. Select **CREATE -> PROJECT RISK** or **PMO -> RISKS -> SUBMIT A PROJECT RISK** from the navigation bar.

2. The Request Creation page opens with the Risk Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **SUBMIT** to submit the Request.

   The Risk begins moving along its pre-defined Workflow toward resolution.

Note

In order to show up in Program Management portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

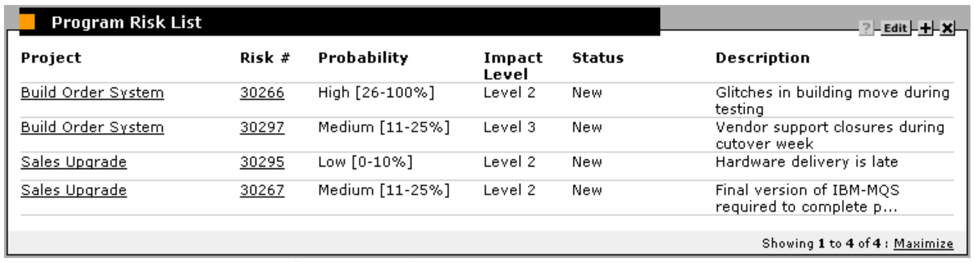
Managing Risks

There are two places to obtain a convenient overview of Risks for a Program:

- *Program Risk List Portlet*
- *Manage Program Page: Risks*

Program Risk List Portlet

The Program Risk List portlet lists all the Risks associated with a particular Program.



Program Risk List

Project	Risk #	Probability	Impact Level	Status	Description
Build Order System	30266	High [26-100%]	Level 2	New	Glitches in building move during testing
Build Order System	30297	Medium [11-25%]	Level 3	New	Vendor support closures during cutover week
Sales Upgrade	30295	Low [0-10%]	Level 2	New	Hardware delivery is late
Sales Upgrade	30267	Medium [11-25%]	Level 2	New	Final version of IBM-MQS required to complete p...

Showing 1 to 4 of 4 : Maximize

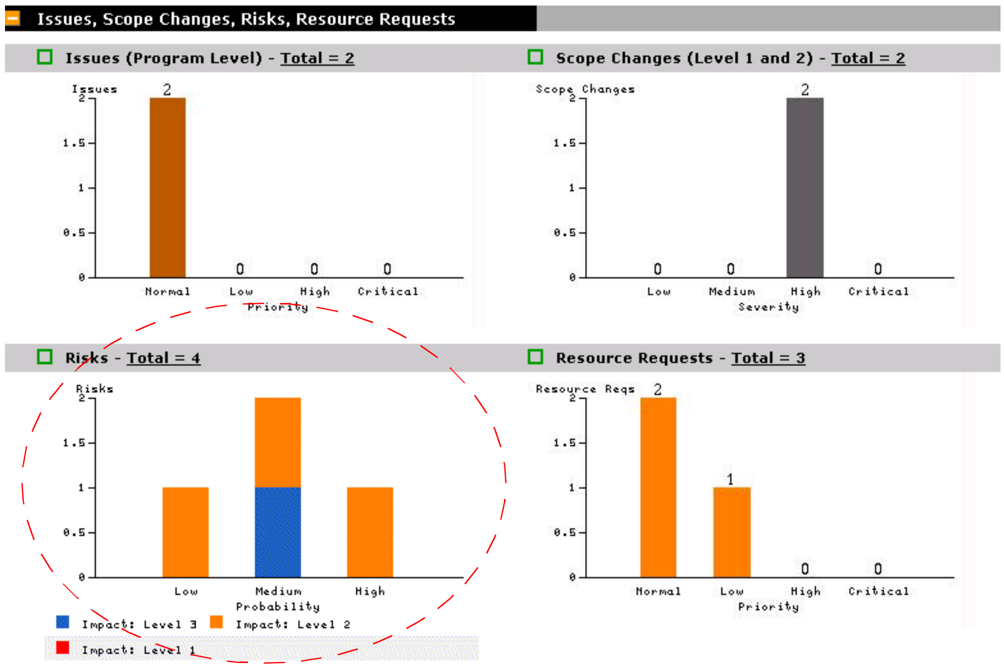
Figure 4-4 Program Risk List portlet

This portlet can have multiple instances for viewing different Programs and their associated Risks. The Program Risk List portlet can be personalized to display Risks based on specified criteria (Status, Impact Level, Probability, etc.). You can also specify how the Risks are grouped. Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.

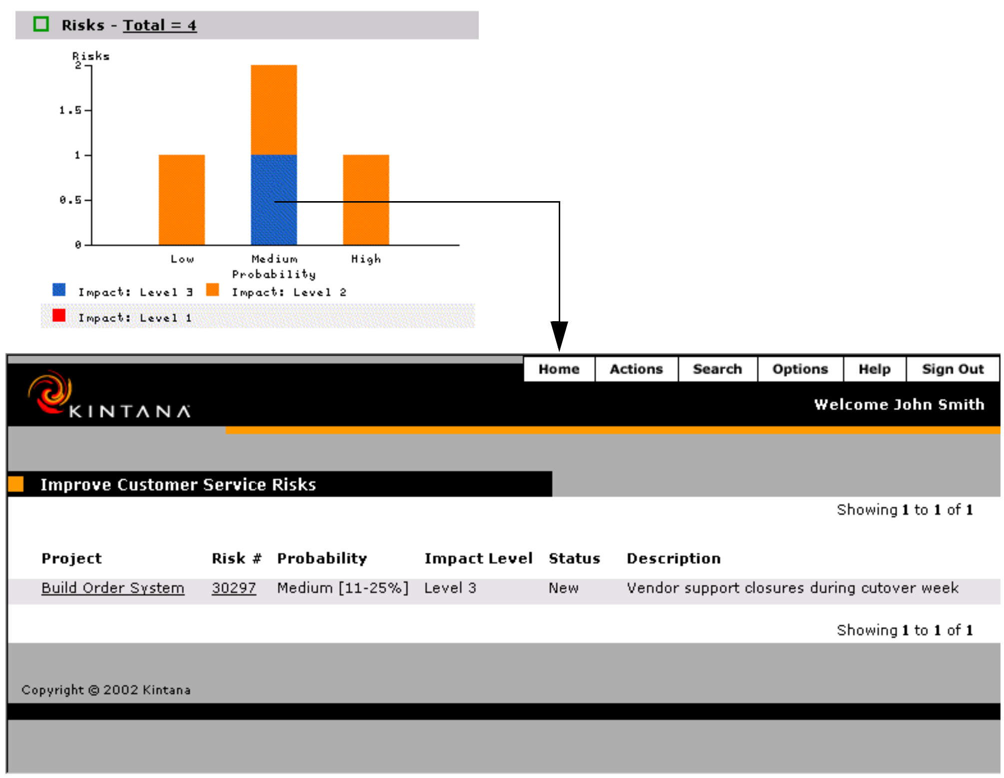
- If the Risk is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Risk # to see the Risk Detail page.

Manage Program Page: Risks

The Manage Program page has a bar chart summarizing the Risks submitted for the Program.



Click on the bar for any Risk group to go to the drill-down page listing all the Risks in that particular group.



Click on the Risk # to see the Risk Detail page.

Working With Scope Changes

During the life cycle of a Program, some problem or business decision may occur that necessitates a change in the Program's scope. These changes can be brought up, processed, and decided upon in the form of Scope Change Requests. The following sections discuss working with Scope Changes in more detail:

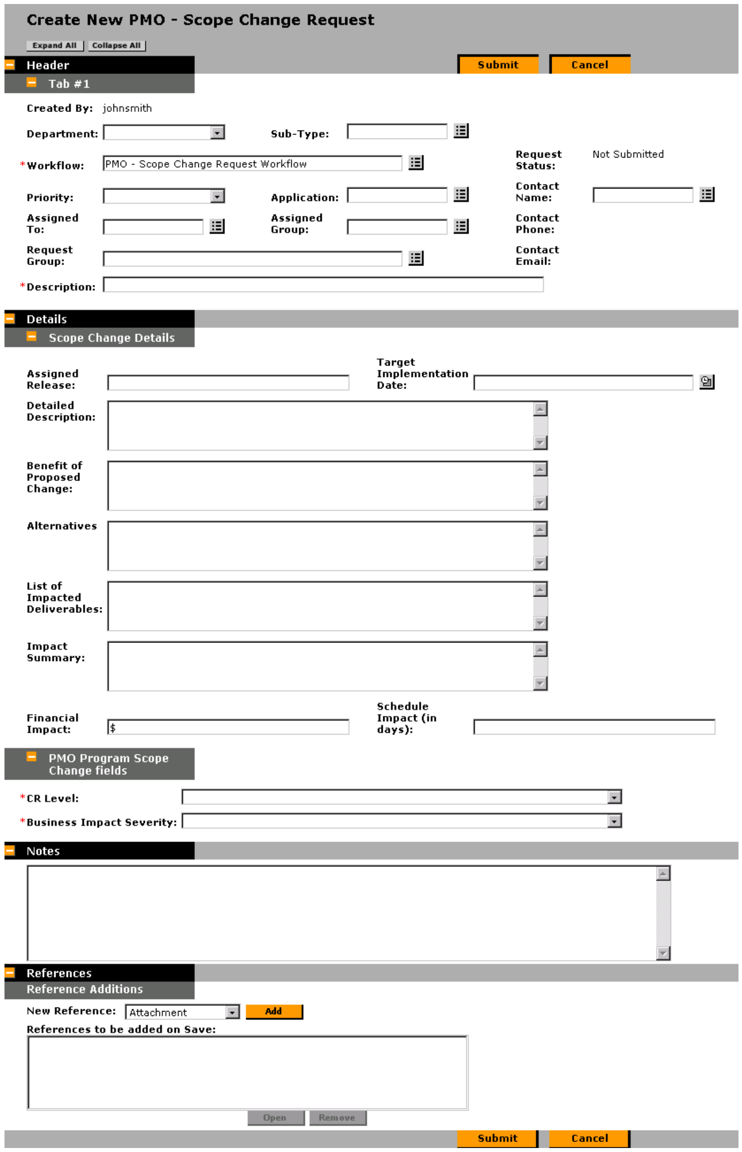
- *Submitting a Scope Change*
- *Managing Scope Changes*

Submitting a Scope Change

To submit a Scope Change:

1. Select **CREATE -> PROJECT SCOPE CHANGE** or **PMO -> SCOPE CHANGES -> REQUEST A PROJECT SCOPE CHANGE** from the navigation bar.

2. The Request Creation page opens with the Scope Change Request Type loaded.



3. Fill in all required fields and any optional fields.

4. Click **SUBMIT** to submit the Request.

   The Scope Change begins moving along its pre-defined Workflow toward resolution.

Note

> In order to show up in Program Management portlets, the Request must be Referenced to a Project associated with a Program or attached directly as a Reference.

Managing Scope Changes

There are two places to obtain a convenient overview of Scope Changes for a Program:

- *Program Scope Change List Portlet*
- *Manage Program Page: Scope Change*

Program Scope Change List Portlet

The Program Scope Change List portlet lists all the Scope Changes associated with a particular Program.

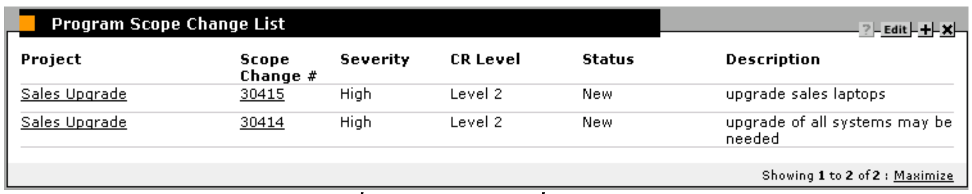


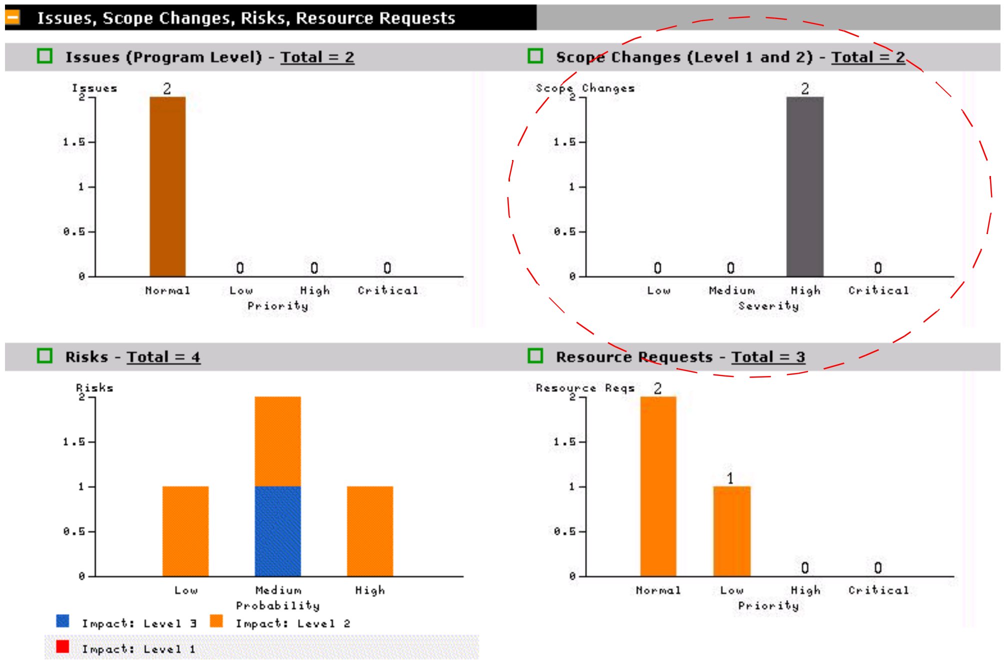
Figure 4-5 Program Scope Change List portlet

This portlet can have multiple instances for viewing different Programs and their associated Scope Changes. The Program Scope Change List portlet can be personalized to display Scope Changes based on specified criteria (Status, Severity, CR Level, etc.). You can also specify how the Scope Changes are grouped. Kintana users with the proper level of access can also specify which columns should be included in the portlet's display in the Kintana Workbench.

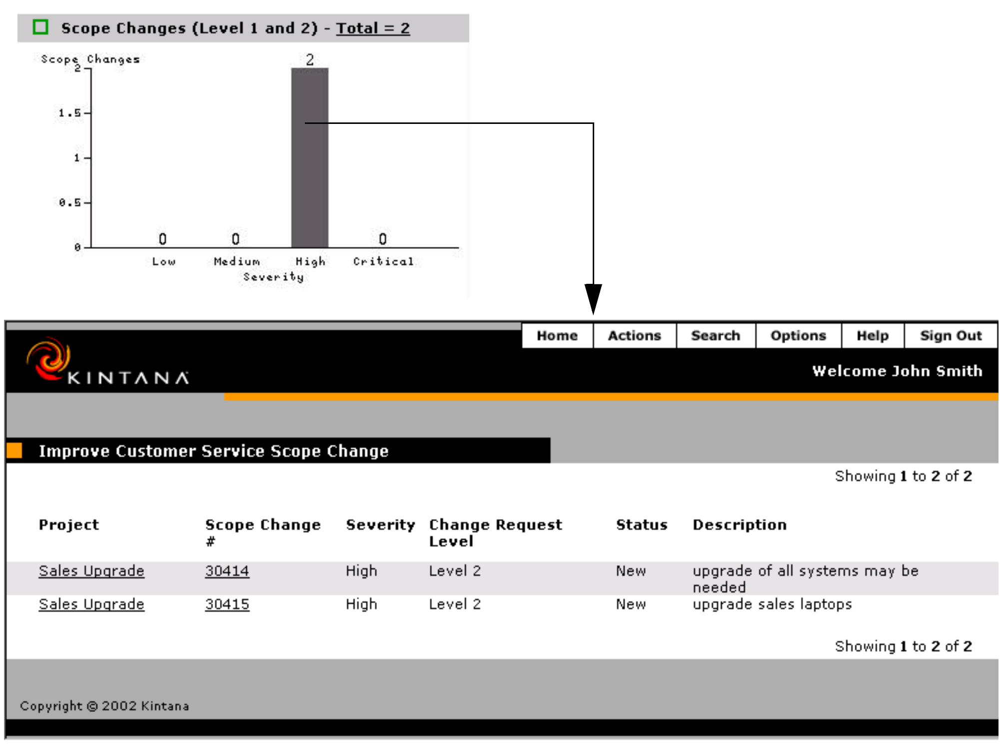
- If the Scope Change is associated with a Project, click on the Project Name to see its Project Overview page.
- Click on the Scope Change # to see the Scope Change Detail page.

Manage Program Page: Scope Change

The Manage Program page has a bar chart summarizing the Scope Changes submitted for the Program.



Click on the bar for any Scope Change group to go to the drill-down page listing all the Scope Changes in that particular group.



Click on the Scope Change # to see the Scope Change Detail page.

Working With Programs

Programs can be impacted by Issues, Resource Requests, Risks, Scope Changes, and many other factors that may necessitate alterations to a Program. The MANAGE PROGRAM page provides a central location from which to view various Program details or make changes.

The following sections discuss working with Programs in more detail:

- *Searching for Programs*

- *Updating Program Priority*
- *Viewing Program Projects*
- *Viewing Cost Information*
- *Viewing Resource Information*
- *Modifying Existing Programs*
- *Modifying Indicator Settings*

Searching for Programs

The Program List portlet provides a high-level summary of the details and current status of all Programs in your system by default.

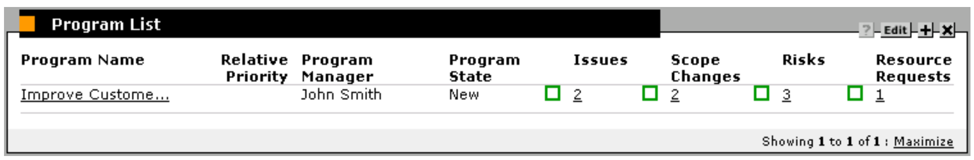
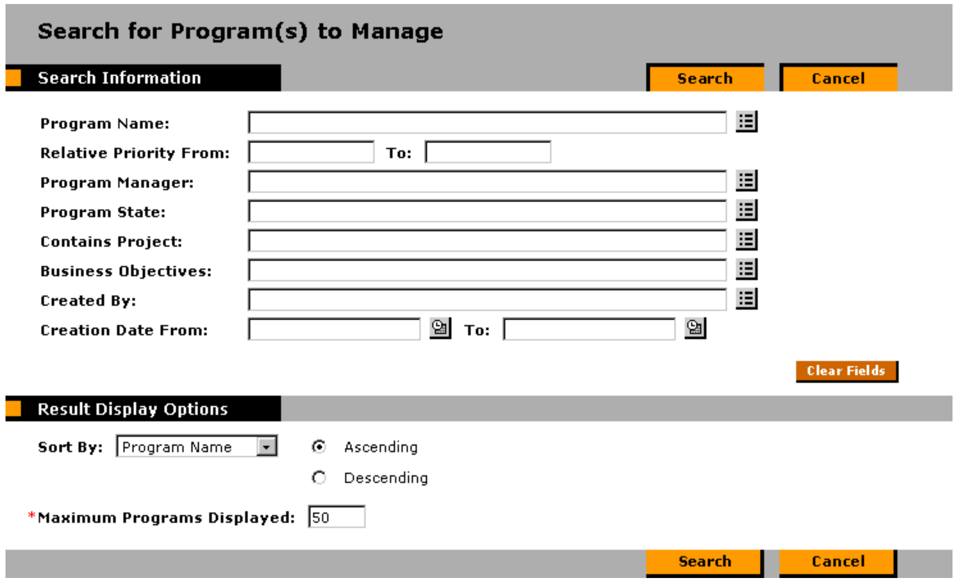


Figure 4-6 Program List portlet

Click on a Program Name to proceed to the Manage Program page for that Program.

To search for Programs:

1. Select **PMO -> MANAGE PROGRAMS** from the navigation bar. The SEARCH FOR PROGRAMS TO MANAGE page opens.



Search for Program(s) to Manage

Search Information — Search | Cancel

Program Name:	
Relative Priority From:	To:
Program Manager:	
Program State:	
Contains Project:	
Business Objectives:	
Created By:	
Creation Date From:	To:

Clear Fields

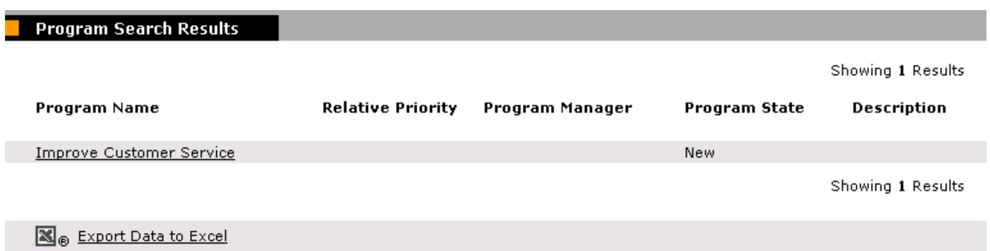
Result Display Options

Sort By: Program Name — Ascending / Descending

*Maximum Programs Displayed: 50

Search | Cancel

2. Enter any search criteria and click **Search**. The Program Search Results page opens.



Program Search Results

Showing 1 Results

Program Name	Relative Priority	Program Manager	Program State	Description
Improve Customer Service			New	

Showing 1 Results

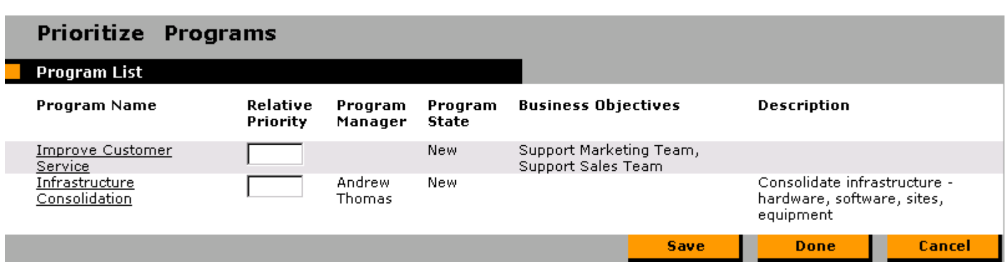
Export Data to Excel

3. Click on a Program Name to proceed to the Manage Program page for that Program.

Updating Program Priority

To change a Program's relative Priority:

1. Select **PMO -> Manage Program Priority** from the navigation bar. The Prioritize Programs page opens.



Prioritize Programs

Program List

Program Name	Relative Priority	Program Manager	Program State	Business Objectives	Description
Improve Customer Service			New	Support Marketing Team, Support Sales Team	
Infrastructure Consolidation		Andrew Thomas	New		Consolidate infrastructure - hardware, software, sites, equipment

Save | Done | Cancel

2. Enter the Program's new Priority in the Relative Priority field.

3. Click **Done** to save changes and return to the last Dashboard page you visited.

   Click **Save** to save changes and continue to work in the Update Program Priority page. Click **Cancel** to return to the last Dashboard page you visited without saving changes.

Viewing Program Projects

There are two places to obtain a convenient overview of Projects associated with a Program:

- *Program Project List Portlet*
- *Manage Program Page: Projects*

Program Project List Portlet

The Program Project List portlet provides a view into all the Projects associated with a Program and their respective health.

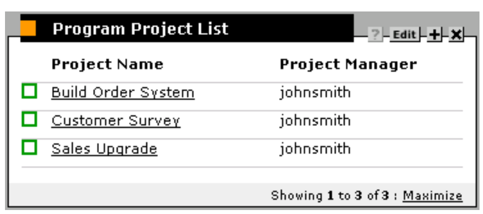


Figure 4-7 Program Project List portlet

This portlet can have multiple instances for viewing different Programs and their associated Projects. You can select which Projects the portlet displays based on a number of specified criteria including Project Name, State, and Summary Condition.

Click on a Project Name to proceed to that Project's Overview page.

Manage Program Page: Projects

The Manage Program page displays a list of Projects associated with a Program.

Projects

Project Name	% Complete	Project State	Sched Start	Sched Finish	Project Manager
Build Order System	0%	Active	10/16/02	12/2/02	John Smith
Customer Survey	0%	Active	10/19/02	11/25/02	John Smith
Sales Upgrade	0%	Active	10/16/02	10/28/02	John Smith

Click on a Project Name to proceed to that Project's OVERVIEW page.

Viewing Cost Information

You can track Cost data for Programs. Enabling Cost tracking can be done when first creating a Program or modifying an existing Program. See *"Configuring Indicator Settings"* on page 46 or *"Modifying Indicator Settings"* on page 76 for more detailed information on turning on Cost tracking.

You can analyze Cost data for Programs by doing one of the following:

- Clicking the **COSTING INFORMATION** tab in the MANAGE PROGRAMS page and clicking **ANALYZE** for either CURRENT or CUMULATIVE COST METRICS.
- Selecting **COST -> PROGRAMS -> CURRENT** or **CUMULATIVE COST METRICS** from the navigation bar.

These analyses are identical to Cost data analyses for Projects. See the 'Working With Projects' User Guide for more information on Cost visibility.

Viewing Resource Information

When creating Staffing Profiles or Resource Pools, you can associate them with a Program for easy reference-ability. See the 'Managing Your Resources with Kintana' Business Application Guide for more detailed information on Staffing Profiles and Resource Pools.

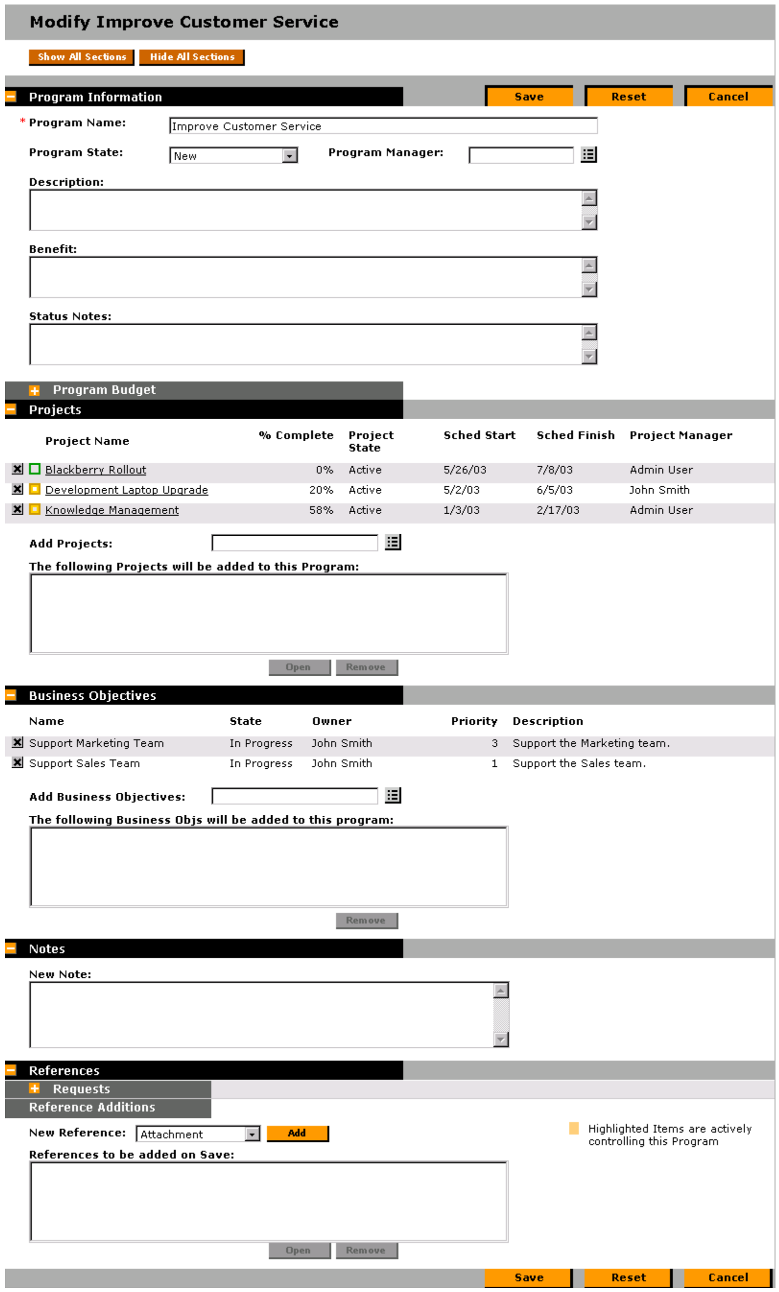
Modifying Existing Programs

Existing Programs can be modified from the MANAGE PROGRAM page.

To modify Program information, Notes, associated Projects, Business Objectives, or References:

1. Navigate to the desired Program's MANAGE PROGRAM page.

2. Click **Modify Program**. The Modify Program page opens.



3. Make any desired changes to the Program Information, Notes, associated Projects, Business Objectives, or References.

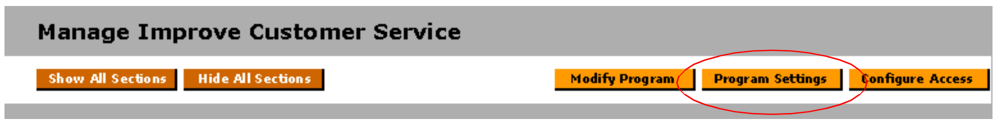
4. Click **Save**. You return to the Manage Program page, and the changes to the Program are saved.

Modifying Indicator Settings

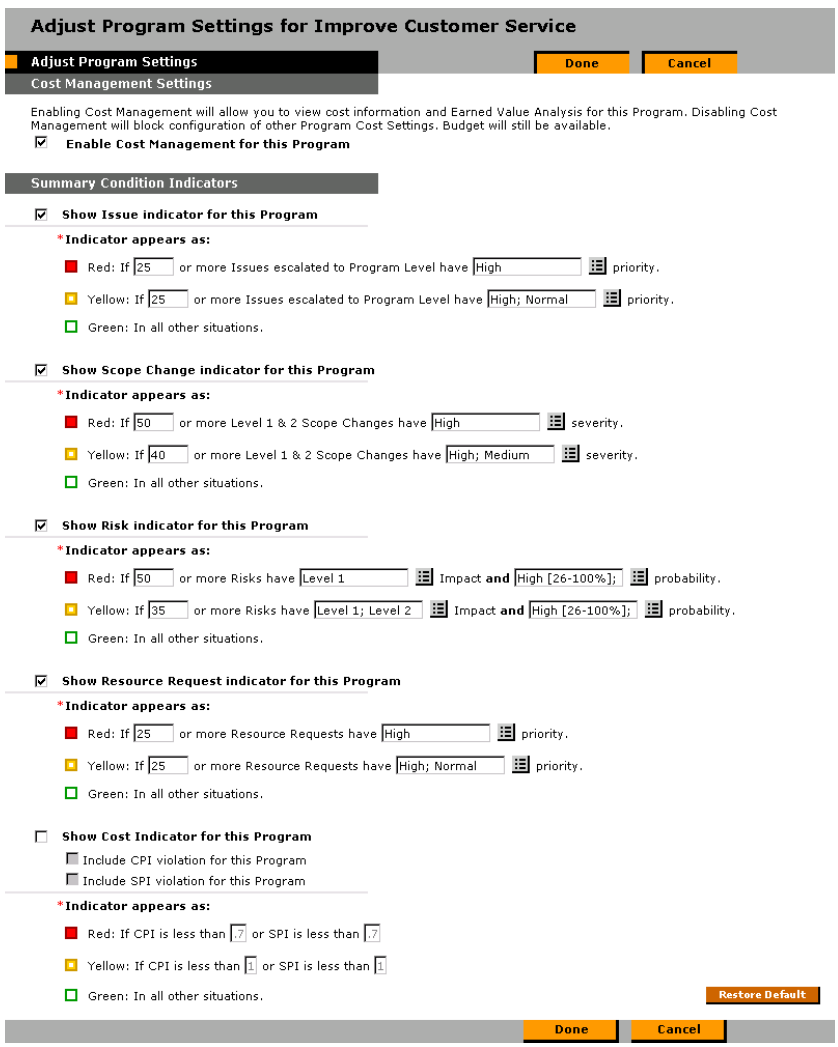
Program Summary Condition Indicators are typically configured when a Program is created. These Indicator settings can be changed at any time from the MANAGE PROGRAM page.

To modify a Program's Summary Condition Indicator configuration:

1. Navigate to the desired Program's MANAGE PROGRAM page.



2. Click **INDICATOR SETTINGS.** The ADJUST PROGRAM SETTINGS page opens.



3. Make any desired changes to the Program's Summary Condition Indicator configurations.

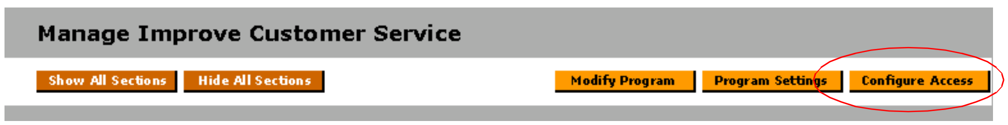
4. Click **Done**. You return to the MANAGE PROGRAM page, and the changes to the Summary Condition Indicator settings are saved.

Modifying Program Access

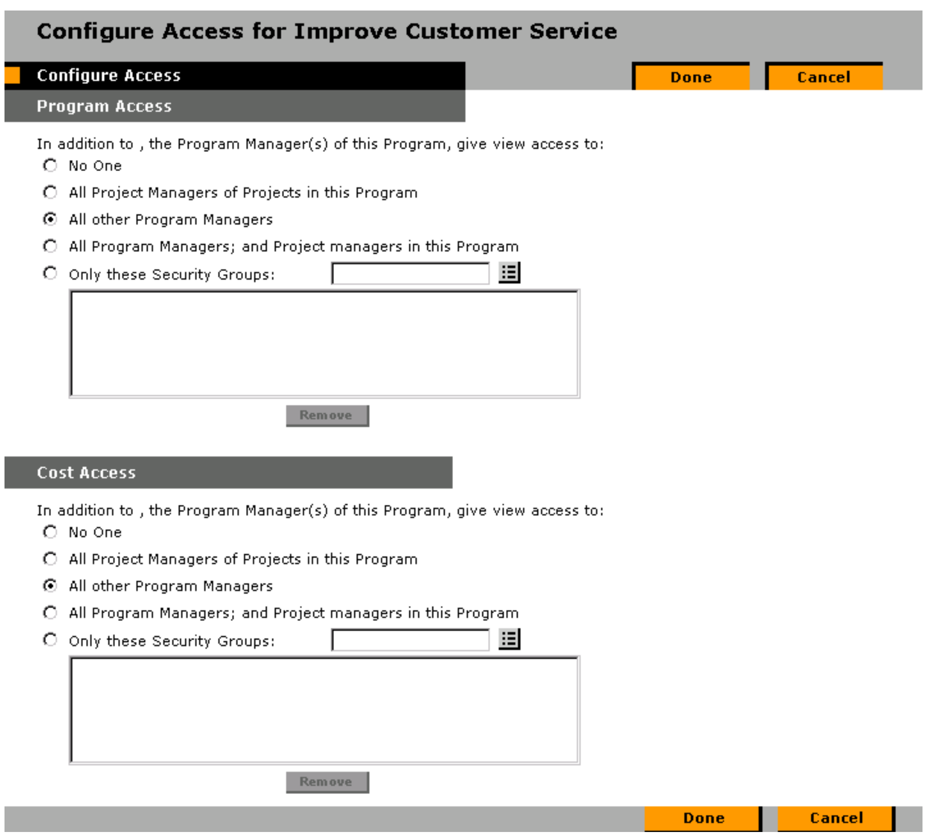
Access to a Program is typically configured when a Program is created. The access settings can be changed at any time from the MANAGE PROGRAM page.

To modify a Program's access configuration:

1. Navigate to the desired Program's MANAGE PROGRAM page.



2. Click **Configure Access**. The CONFIGURE ACCESS page opens.



3. Make any desired changes to the Program's user access configurations.

4. Click **DONE**. You return to the MANAGE PROGRAM page, and the changes to the Summary Condition Indicator settings are saved.

Chapter 5
Reports

The Program Management Office Solution provides two sets of interactive Reports that can be used to view useful information on the four Program Management Request Types.

The following sections discuss the Program Management Office Reports in more detail:

- *Activity Reports*
- *Resolution Time Reports*

Note

Activity and Resolution Time Reports are the same for each Program Management Request Type.

Activity Reports

The Activity Report for Program Management displays resolution and creation numbers for a Program Management Request Type in parallel bar charts.

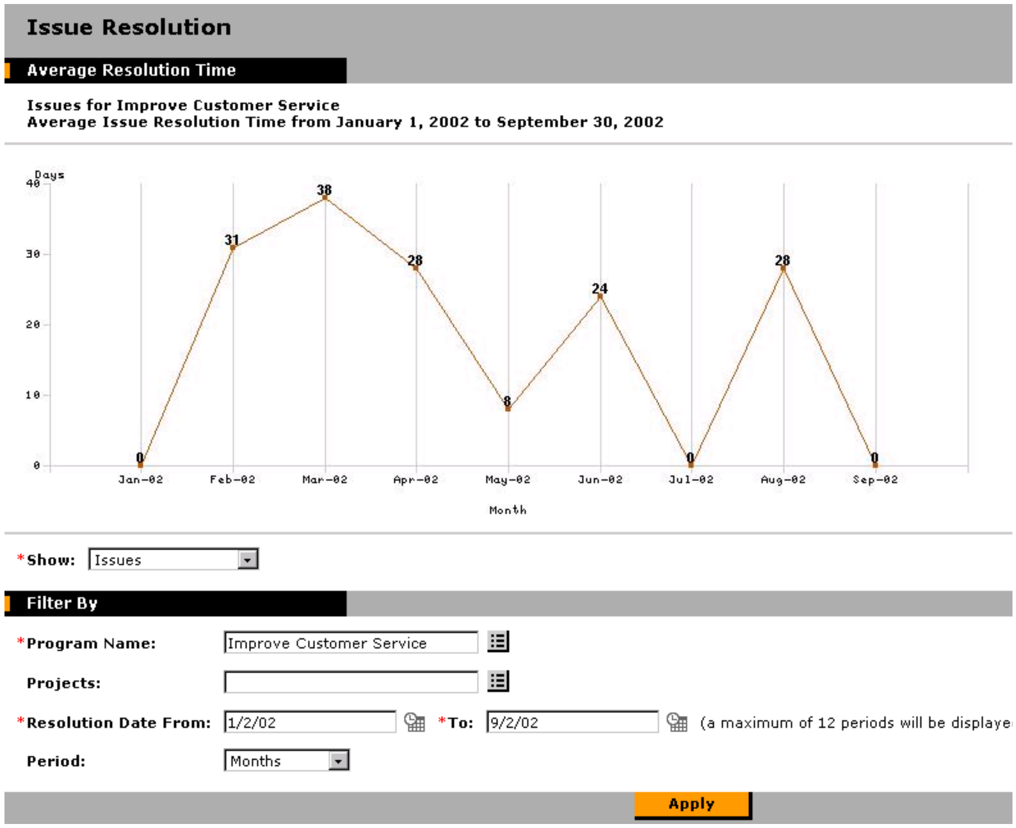
The chart display can be filtered according to several useful variables:

- Program Name (required)
- Projects
- Resolution Date From/To (required)
- Period

To filter the chart display, enter the desired criteria into the proper fields and click **Apply**. The Report page reloads with the new filter criteria applied.

Resolution Time Reports

The Resolution Time Report for Program Management displays resolution time in days over a period of time for a Program Management Request Type in line graph form. The numbers for each period (week or month) are averaged, and the average appears in the center of the period as a point.



The chart display can be filtered according to several useful variables:

- Program Name (required)
- Projects
- Resolution Date From/To (required)
- Period

To filter the chart display, enter the desired criteria into the proper fields and click **APPLY**. The Report reloads with the new filter criteria applied.

Index

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