



Project Remedies Inc.

ActionProgram Manager Plus™

User Guide

Version 7.6



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PLEASE NOTE:

This copy is a technical writing example ONLY. It is not complete. The complete *APM Plus User Guide* is much longer. To request the full document, please contact Stan Feinstein at Project Remedies Inc., at 1-310-230-1722. Thank you!



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Preface

This section includes the following topics:

- About ActionProgram Manager Plus™
- Audience
- System Licensing
- Prerequisites/Requirements
- ITSM Add-Ons
- Microsoft Project Interface Add-On
- Third-party Software Integration
- Basic BMC Remedy AR System® Functionality
- Overview of This Guide

About ActionProgram Manager Plus™

ActionProgram Manager Plus™ (“APM Plus”) is an enterprise-wide, turnkey application for project management developed by Project Remedies Inc. (PRI). Taking advantage of a multi-user network environment, APM Plus allows you to create, approve, work, and manage projects of all sizes in real time from within the BMC Remedy Action Request (AR) System™.

PRI’s ActionProgram Manager Plus is the only program/project management application that runs on the Remedy Action Request System. It is also the only program/project management system that interfaces directly with the BMC Remedy IT Service Management suite, which also runs on the Action Request System. As a result, only BMC and PRI provide an integrated solution to manage all work.

Created in the Action Request System

Created in the AR System, APM Plus leverages the user interface to provide a familiar application environment and investment in training, operations, and employee experience. No additional AR



System licenses are required to install and begin using ActionProgram Manager Plus, increasing the return on your original BMC Remedy AR System investment.



Figure 1 - BMC Remedy AR System

APM Plus may be integrated with BMC Remedy IT Service Management Suite, which includes Service Request Management, Help Desk, Change Management and Assets Management applications. It can also be integrated with home-grown AR System-based applications. Remedy Service Level Manager can be configured to track service level agreements against projects and tasks managed and tracked in ActionProgram Manager Plus.

Goal: Increase Efficiency, Lower Costs, and Create a Culture of Accountability

APM Plus gives management the ability to forecast resources at the skills level and helps to answer basic questions such as:

“Do we have enough resources to do what we want to do?”

“When will we have skills shortages and skills surpluses?”

“What is the current status of all our projects?”

“What are our actual project costs?”



Using the AR System interface, terminology, and processes, APM Plus provides a centralized location for implementing the best practices of project management. APM Plus can be used for tracking all types of projects of all different sizes, including individual, organization, or corporate-wide projects. It helps you balance resources effectively across new projects as well as maintenance projects.

Use APM Plus to:

- Easily create, work and review projects within the same application on the network, regardless of where staff is located.
- Instantly assess a project's progress with real-time reports and charts, pinpointing issues needing attention.
- Improve on-schedule project performance through automated notifications and alerts.
- Immediately access real-time information about a project and its tasks.
- Create templates for approval tasks and work tasks. Templates increase efficiency and consistency, enforce process, and amortize effort over time. The APM Plus template features help your organization reap the benefits from implementing consistent processes that can be improved over time for additional savings.

ActionProgram Manager Plus can be used as a stand-alone application, or used with other PRI products, and/or other AR system-based applications. For example:

- When combined with PRI's Service Manager, it forms PRI's complete Service Request Application.
- APM Plus can be integrated with your existing AR System-based applications, including Change Management and Asset Management. ActionProgram Manager Plus is the only program management system that integrates with AR System-based asset management applications.
- APM Plus can also be used with PRI's new MS Project Import and Export functionality.



Better Communication Equals Better Program Management

Typically, in an AR System-based incident or problem tracking system, a request comes in to the help desk. A task is created and someone is assigned to work the task. The worker reports the task status, eventually closes the task, and goes on to the next one. In designing ActionProgram Manager Plus, we wanted to use this basic structure, but make it applicable to projects and project tasks, and make it very easy for everyone to use.

Your project managers can create their own approval and task templates to standardize repeating processes, which is an essential aspect of improving quality while lowering costs. Task workers are given clear assignments and a working environment, and easy to use Time and Expense tracking forms. The time entered is reflected in the project metrics and budget - in real time.

APM Plus uses automated notifications and schedule alerts to help keep a project's tasks on schedule. Utilizing the flexible notification options of the AR System, management and staff are alerted to project approval, task assignments, task deadlines, and changes to the project plan.

Communication through APM Plus-controlled notification and automatic escalation ensures that project managers, project approvers, and assigned users always know what is expected of them and when it is expected.

Rapid Implementation – Leverage Your Remedy Investment and Reduce Risk

Created to work on AR System, APM Plus leverages that user interface to provide a familiar application environment and recoup your investment in training, operations, and employee experience. Installing ActionProgram Manager Plus on your existing AR System environment can be done quickly and straightforwardly. Often, integrating APM Plus with your existing notification system and customizing it to fit with your specific requirements can be accomplished in a week or two.

ActionProgram Manager Plus reduces implementation time and the risk associated with developing customized applications. APM Plus is delivered with its forms and workflow so it is fully customizable. Your technical personnel can modify the interface,



back-end integration, and functionality to customize the application for your organization.

Proposed projects can be defined and approved, then planned, executed, and worked on using APM Plus.

APM Plus Third Party Software Integration

APM Plus may be integrated with third-party software such as Paging and Accounting System, to leverage tools and processes already in use. APM Plus may be integrated with the BMC Remedy IT Service Management Suite, which includes Service Request Management, Help Desk, Change Management and Assets Management applications. It can also be integrated with home-grown AR System-based applications. Remedy Service Level Manager can be used to track service level agreements against projects and tasks managed and tracked in ActionProgram Manager Plus.

Each task may be associated with another application or secondary form. Managers can set up the related form as part of a task template, which will automatically take the end-user directly to the specific application or form and tab that needs to be updated to complete the task.

PRI Links to ITSM

Because it is built on the AR System, APM Plus can be linked directly to the applications in the Remedy ITSM Suite. This allows you to:

- Create a project from an Infrastructure Change (i.e., Change Request).
- Create an Infrastructure Change from a Project Task.
- Project tasks, approval tasks, and proposed projects can be posted to the Overview Console.

Microsoft Project Interface

Project Remedies offers an add-on feature that makes it possible to import and export projects between MS Project and APM Plus.



For more information about this powerful interface, please contact Project Remedies Inc. at (310) 230-1722.

Audience

This guide is written for users of PRI's ActionProgram Manager Plus™ application, including Program Managers, Project Managers, Project Approvers, and Task Workers. This guide details how to use APM Plus and assumes that the reader knows how to use the AR System user tool.

For detailed information about the AR System user tool, please refer to the "Action Request System Getting Started Guide" and the "Action Request System User's Guides" published by BMC Software Inc.

System Licensing

No Remedy application license is required. However, ActionProgram Manager users must have an AR System license.

Prerequisites/Requirements

Using APM Plus for project management requires that the application be installed and configured, that appropriate data (people, skills, locations, etc.) be added, and for testing and validation purposes that the initial approval and work task templates are created.

Overview of This Guide

This user guide is divided into the following parts:

Preface – Provides an introduction to APM Plus.

Chapter 1: Concepts – Provides an overview of project planning and management standards used in APM Plus, and also describes basic APM Plus functionality such as forms, charts, and navigation.



Chapter 2: Working with APM Plus – Provides reference to forms, reports, and interface elements.

Chapter 3: The Proposal Phase – Describes to how to create a proposed project plan.

Chapter 4: The Planning Phase – Describes how to create a project plan.

Chapter 5: The Project Plan Approval Phase – Details how a project plan is approved.

Chapter 6: The Working and Reviewing Phase – Details how tasks are worked, provides a place for revisions, and notifies a project manager of schedule changes.

Chapter 7: The Project Completion Phase – Describes how to close a project.

Chapter 8: Viewing a Project – Describes how to review a project with charts, reports, and query lists.

Chapter 9: Creating Templates – Describes how to create task and approval templates.

Using This Guide

The following conventions are used in this guide:

Bold

Bold is used to identify required fields in APM forms.

Example: Select Pending Approval in the **Status** field.

Italics

Data values included with ActionProgram Manager Plus.

Example: The Time Units field includes *Days* and *Hours*.



Italics are also used to emphasize a point.

Example: Only the *Project Manager* can modify this field.

>

Identifies a series of menu or form selections.

Example: Open the APM:Tasks form > Work Time tab.



Chapter 1: Concepts

This section introduces the project planning and management standards used in PRI's ActionProgram Manager Plus (“APM Plus”). It provides terminology and concepts needed to successfully plan, manage, and implement projects using this application. This section includes the following topics:

- Basic Project Life Cycle
- APM Plus Project Phases
- Project Elements
- Project Scheduling
- APM Plus Features
- Project Roles
- Project Costs

Basic Project Life Cycle

ActionProgram Manager Plus provides a flexible environment for proposing, planning, working, and reviewing projects. It does not impose project management process or methodology. Instead, it provides a framework that can be customized and modified to support the unique project management needs of each organization.

Projects typically progress through the following phases:

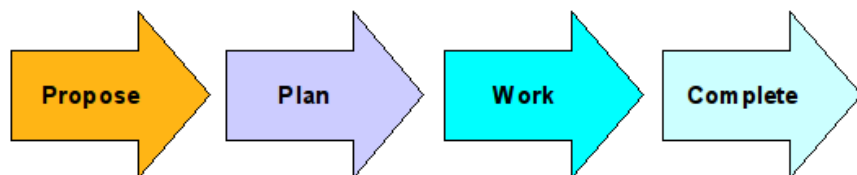


Figure 2 - Project Life Cycle Phases



Some projects require a detailed proposal process, others begin at the planning phase. ActionProgram Manager Plus provides support for both of these approaches. Once the plan is finalized, the project tasks are worked and the project is completed.

APM Plus Project Phases

The basic APM Plus life cycle includes 5 phases:

- Proposal Phase (Optional) – Includes a proposed project approval process and preliminary project planning.
- Planning Phase
- Project Plan Approval Phase
- Working and Reviewing Phase
- Project Completion Phase

These are illustrated in the following diagram and discussed in the sections below. Subsequent chapters describe how to perform the tasks for each phase in detailed step-by-step instructions.

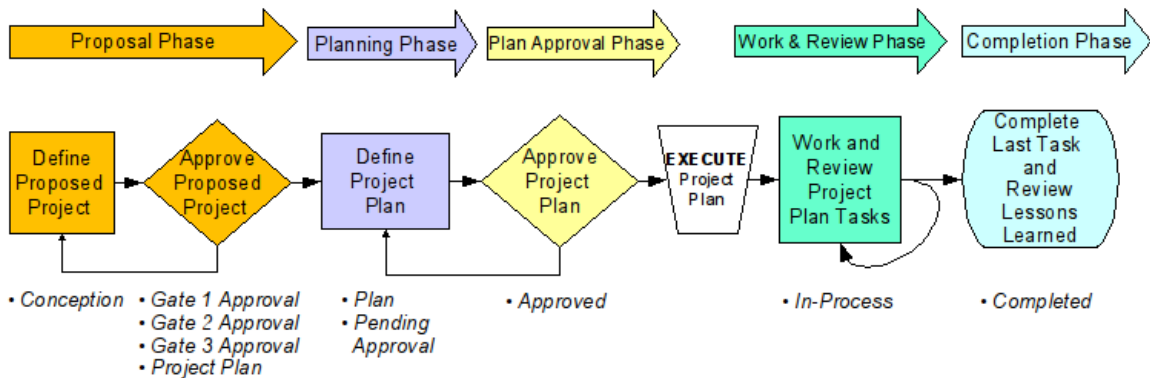


Figure 3 - APM Plus Basic Project Life Cycle

APM Plus gives management the ability to plan, control, and monitor projects from start to finish, throughout their entire life cycle. APM Plus provides support for projects from proposals through the detailed planning and working the plan. The proposal phase and the plan approval phase both include a pre-defined approval process.



Both the proposed project plan, if used, and the project plan must be approved before the project can move to the next phase.

After a project plan is approved, it is executed into the active, working phase.

The Proposal Phase

Some projects require a formal proposal process. Others do not, and begin with the planning phase, described in the next section.

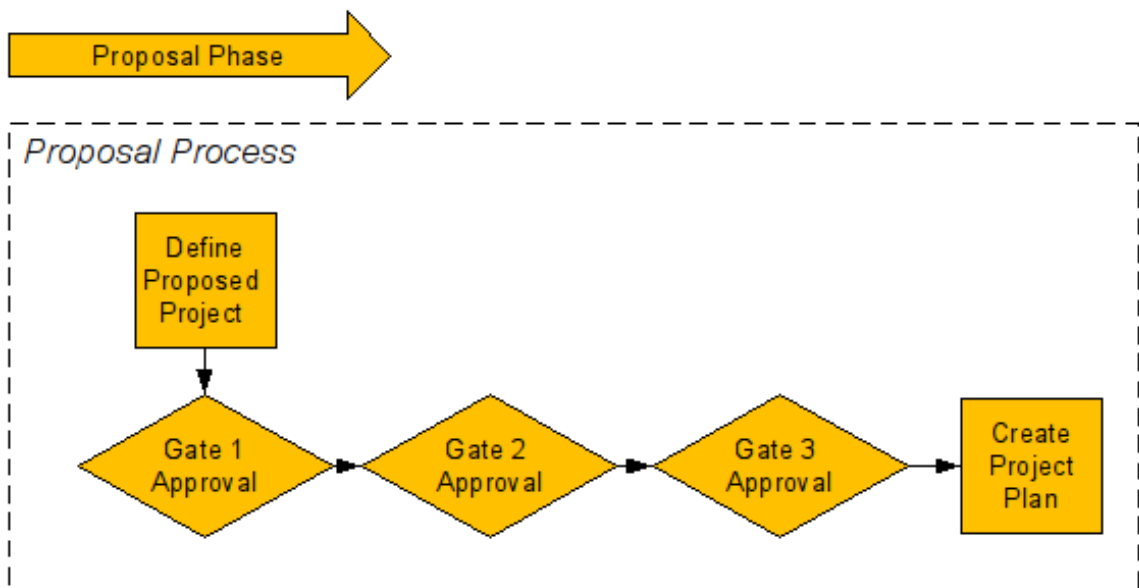


Figure 4 - Proposal Phase

During the proposal phase, the proposed project is defined, reviewed, and approved or rejected by stakeholders. With APM Plus, you can create proposed projects that have multiple detailed approval processes. You can create templates for repeating the approval tasks on proposed projects, thus increasing efficiency and lowering costs.

Once a proposed project is approved, you can begin the project planning phase, then continue through the project plan approval, working and review, and project completion phases.

For projects requiring a proposal process, APM Plus provides a collection of forms that enable you to create and modify proposed projects, with three different approval gates.



APM Plus forms let you create and modify proposed projects, and they support the processes and communication needed to move from the proposal phase to the project planning phase. The following steps summarize the work. Detailed instructions are in Chapter 3.

1. Create a proposed project plan, including a unique project name, the responsible organization and person, and a description.
2. Enter general project information.
3. Enter project resources to create a project budget, allocate the budget by type of money, and add detailed priority and other metrics.
4. Get Gate 1 Project Manager approval.
5. Get Gate 2 approval. (The project manager selects and executes the Gate 2 Approval Process.)
6. Get Gate 3 Steering committee approval.
7. Begin preliminary project planning, including selecting the project plan approval process, task template and other project plan data required for the implementation of the project plan.
8. When all the initial project plan parameters are specified, complete the project planning phase by using the Create Project Plan capability to create the APM:Project record, and then continue the process in the APM:Projects form.

Track the Work Time Spent on the Proposal Phase

If desired, APM Plus enables you to seamlessly create a project proposal using the full scope of APM Plus features: templates, time tracking, reports, etc. Basically, you create a project plan with APM Plus that uses Related Forms functionality for the execution of the proposal process. The APM:Project tasks needed to create the proposed project are linked to the corresponding proposal form tabs. Each task takes you to the correct tab where, by completing that task, you are completing the tasks needed to create the proposed project. As you complete the tasks, you record your progress in the task form, and in the time and expense forms. Thus



when complete, your APM:Project has recorded the metrics which show the time, effort and cost of developing the proposed project plan.

On the final step, when the newly developed proposed project is ready to actually be worked as an APM Plus project, its tasks are added to the original APM Plus project so that it will eventually contain a full picture of the time, effort and cost of both defining a proposed project and executing the resulting proposed project. In addition, APM Plus isolates the metrics acquired during the definition of the proposed project from those gathered during the execution of the proposed project so that reports can distinguish between the total cost of defining versus the total cost of implementing the project.

The Planning Phase

During the planning phase, the project plan is created. The project plan includes basic project information, schedule dates, tasks, and approval process, as well as detailed task and resource assignments. If a proposed project was used to estimate values for resources and schedule, this process is still required to specify the actual assigned resources and the final actual schedule.

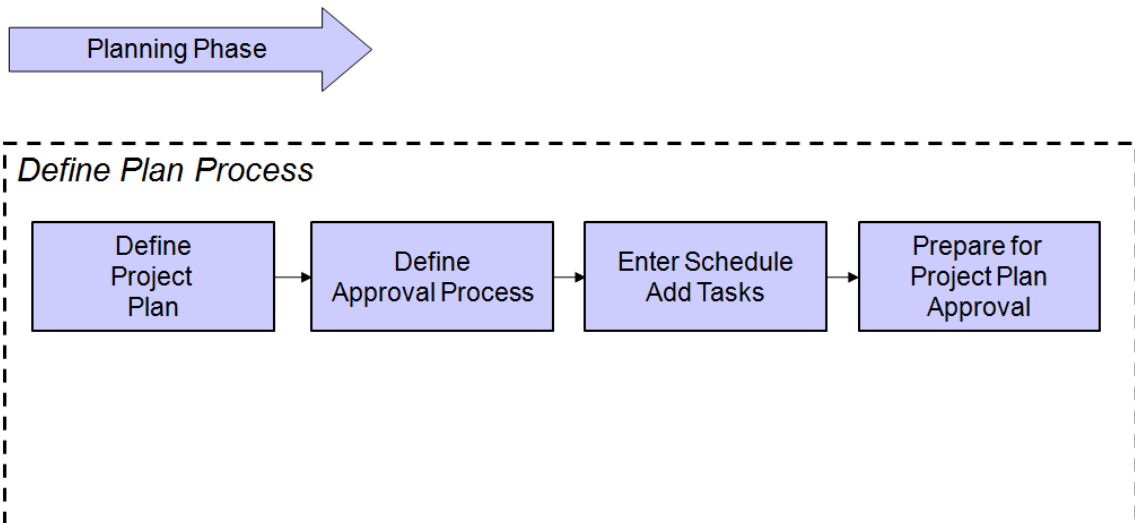


Figure 5 - Planning Phase

The following steps summarize the work. Detailed instructions are located in Chapter 4.



1. Create a New Project Plan. If the project already has a proposal, the plan is created from the Proposed Project form, and the following discussion is in terms of modifying or adding to that project plan. For projects that skip the proposal phase and start with the planning phase, a new project plan is created as follows:
 - Start a new project—the status is Plan.
 - Enter general project information such as project name, description, and project sponsor.
 - Categorize by fully customizable summarization choices. These are available to users in menu item lists. The same options are also available as options when creating charts, to sort projects by the characteristics that are important to management.
 - Select a project account.
 - Assign the project manager and the responsible organization.
 - Define project elements: select the approval process, risk level, and template, time unit, project schedule orientation, and task notifications.
 - Enter schedule information including planned start and finish dates.
 - Attach any associated project documents.

2. Add Project Tasks and Milestones.
 - Enter task information, create summary and sub-tasks, and define milestones.
 - Create dependency relationships; create dependencies between tasks and milestones, and between projects.
 - Optionally group projects together into pools or programs for reporting and tracking.



- Determine the Critical Path, automatically performed by APM Plus.
3. Prepare for Project Plan Approval.
- Execute the approval process. The project status changes from Plan to Pending Approval.

The Project Plan Approval Phase

Approving a project plan is a significant milestone in ActionProgram Manager Plus. In APM Plus, a formal process is used to transition a project from the planning to the working phase. Only users assigned to a specific approval task can approve each task. When the final approval task is approved, the project plan is automatically approved.

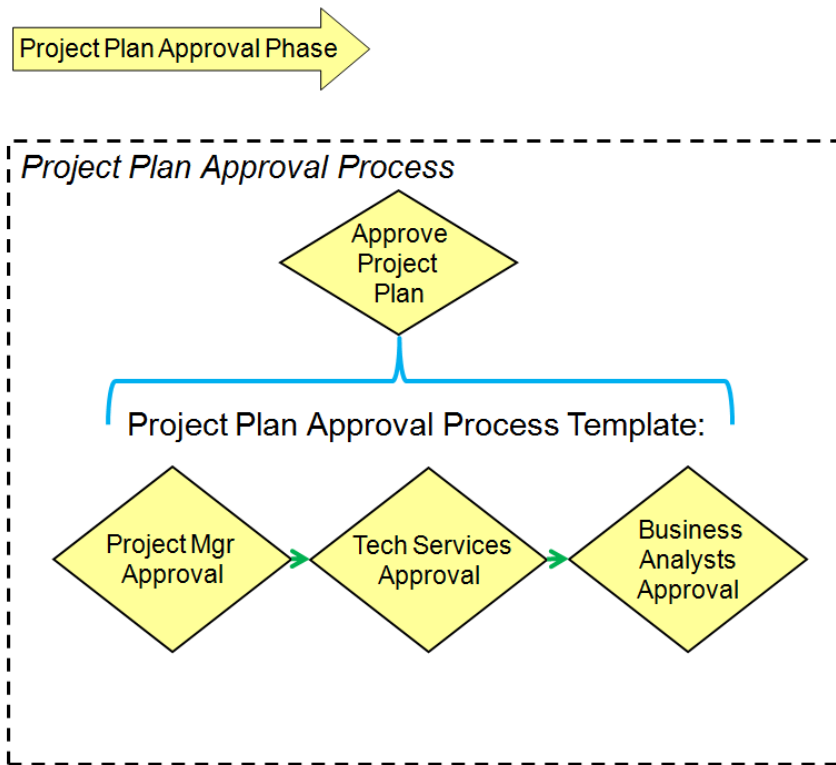


Figure 6 - Project Plan Approval Phase Example

When you execute the approval, the project plan moves into the approval process, the status changes to Pending Approval, and the approver(s) are notified. (Each approver is notified the same way as in your existing AR System applications.) Your approval



process can be as simple or complex as you would like. You can create custom approval processes using APM Plus templates.

The approval phase includes the following basic steps. See **Error! Reference source not found.** for detailed instructions on the project plan approval phase.

1. Each approver reviews the Project Plan.
2. Each approver can reject and force a re-plan, if needed.
3. Each approver determines when the plan is OK from their perspective, and approves the project plan.
4. To approve the project plan, the approvers change the status on their approval tasks to Approved. If they want to reject the plan, they change the status to Rejected, and must add a rejection reason. When all tasks are approved, the project status goes to Approved and the person in the project manager role is notified.
5. Execute the Approved Project into the Working Phase.
 - After the project has been approved, the project manager executes the project. This changes the status of the project from Approved to In Process; beginning the working phase.
 - The Baseline plan is created. The Baseline plan plays an important role in managing and measuring a project's success. The Baseline plan cannot be modified or deleted. Tasks and milestones may be added to a project after it starts, is deleted, or is modified, but the changes will not appear in the Baseline plan.
 - The project Base Start Date, Base Finish Date, Base Duration, Base Labor Hrs., and Base Costs are populated with the project plan information and cannot be changed.
 - The current date/time is recorded in the Actual Start Date field as the project start.



- The person assigned as the responsible party for the first task(s) is notified. The responsible party may assign someone else to actually work the task.

The Working and Reviewing Phase

The working and reviewing phase begins when the project manager executes the project.

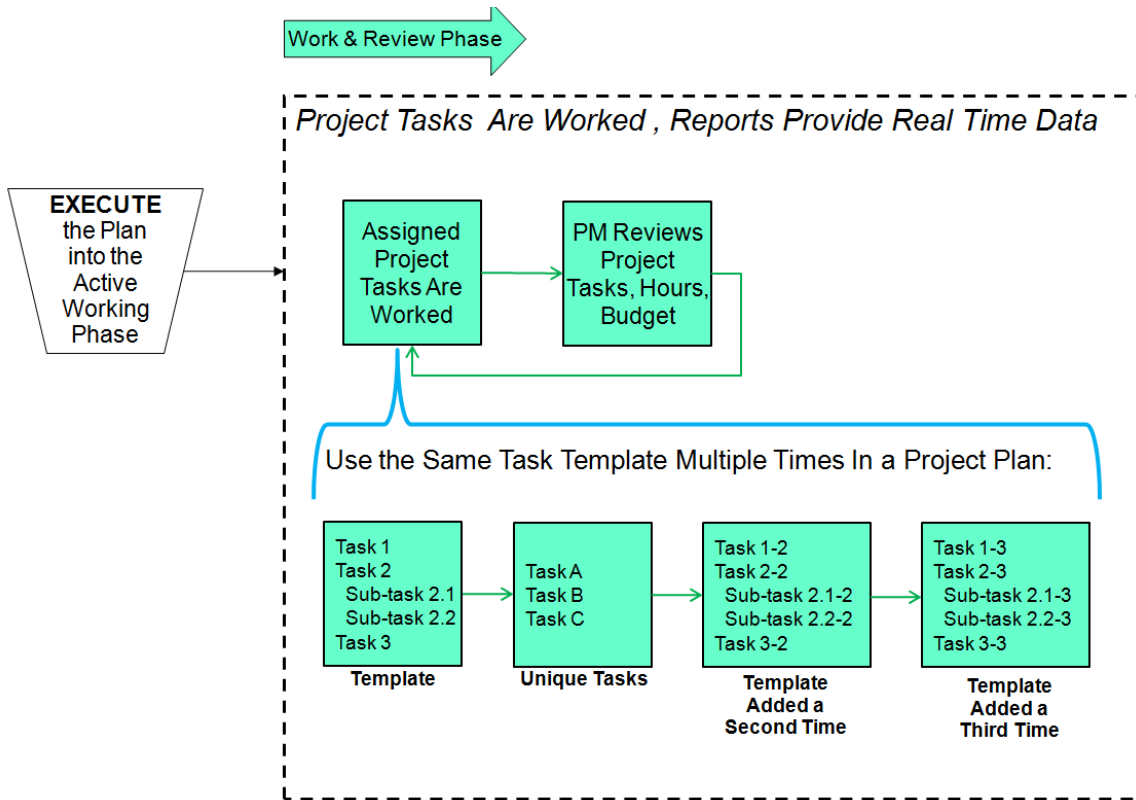


Figure 7 - Working and Reviewing Phase

Working tasks are summarized below and described in Chapter 6. Chapter 8 describes the charts and reports available for reviewing a project's status.

NOTE: APM Plus does not prevent a worker from working a task earlier than scheduled by changing the status from *Hold* to *Assigned*. As with the planning phase, APM Plus capitalizes on the multi-user network environment, allowing anyone working on a project to log time against it, whether assigned or not.



- Once a project starts, work can begin on the tasks of the project based upon the schedule.
- Project Managers have real-time information regarding the project's progress even if the assigned staff is in different offices, states or countries.
- In order to begin working a task, the worker minimally has to change the task status from Assigned to In Process. The current date/time is logged as the start time for the task, and the APM:Tasks form > Work Time tab becomes available.
- When the last project task is finished, the project status automatically changes from In Process to Completed and the Review phase begins.
- All work ends on the project and the important process of comparing the project's Baseline plan with its actual performance begins.
- Everyone involved can review the project and save their lessons learned in the Project Details diary field, or as an attached document.

The Project Completion Phase

The project closes automatically when the last task is completed.

An important aspect of effective project management is to clearly understand the differences between the project as planned and the project as implemented. APM Plus has captured all the data necessary to conduct a thorough analysis, including the following:

- Baseline project plan
- Actual project plan
- Comparative Gantt chart
- Project variance report
- Planned labor hours
- Actual work time logged



- Work time summary report
- Project Details field log

If an APM Plus project plan was used to capture the metrics associated with the development of the proposed project, then much of the above data was also captured and isolated during the definition of the proposed project.

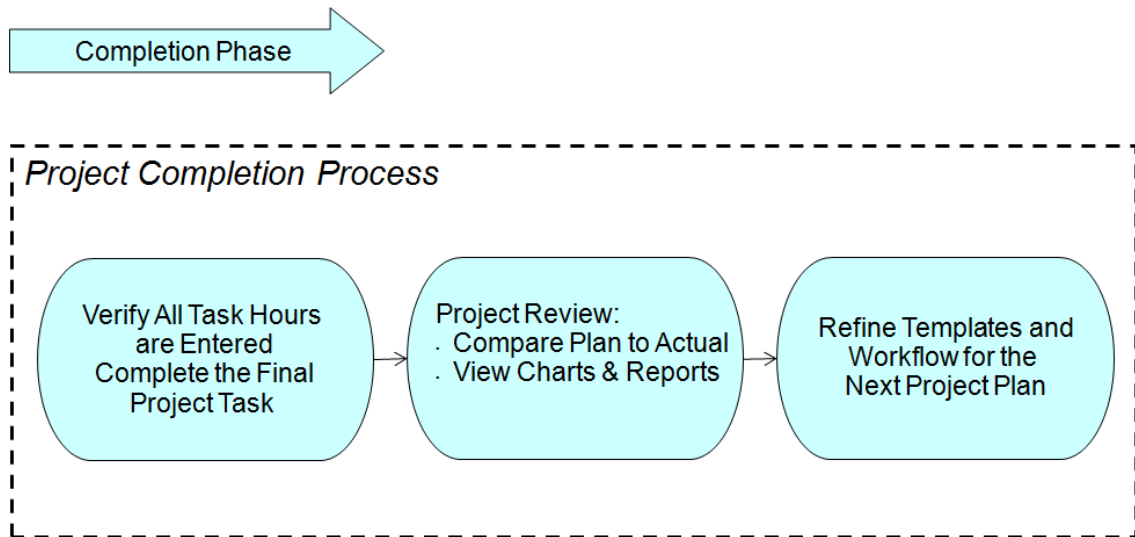


Figure 8 - Completion Phase

Project Life Cycle Variations

APM Plus supports additional life cycle variations depending on your needs. For example, a common variation of the project cycle is to create and define a project plan without a proposal phase. Another variation is to track time-at-task effort during the proposal phase, by creating an APM Plus project plan that includes the tasks needed to create the proposed project.

All new project plans created in APM Plus will automatically generate a Proposed Project record as well, providing additional charting and reporting flexibility.

Project Elements

This section describes the major elements that are part of a project. APM Plus projects include the following elements:



- Tasks
- Milestones
- Summary Tasks
- Task Work Breakdown Structure (WBS)
- Dependencies
- Inter-Project Dependencies
- Resources

Tasks

A task is a single and complete unit of work. A task can be stand-alone or grouped as a sub-task of a summary task. Sub-tasks are sometimes referred to as child tasks. Tasks at the top level (Level 0) are directly under the project record. Tasks at any other level are sub-tasks. APM Plus supports as many levels of sub-tasks as you need.

ActionProgram Manger Plus allows an unlimited number of tasks, summary tasks, and milestones to be added to a project. They can be stand-alone in the project or layered to form multiple levels of sub-tasks and milestones, contained within a summary task.



Figure 9 - APM:Tasks Form

Group and User Assignments

Groups and individual users are assigned responsibility for managing and working tasks in the project.

Assigning Resources to Tasks

In some organizations, the project manager assigns resources to tasks by skill, location, and quantity, and leaves it to the performing organization manager to actually name the people who will work each task. In other organizations, the project manager can name the people. With ActionProgram Manager Plus, both methods can be used. When a person is assigned by name to a task, that person’s hours can be seen on the Resource Chart. APM Plus allows user assignments made in the planning phase to be re-assigned by group managers during the working phase to accommodate schedule and availability.

Project Schedules

ActionProgram Manager Plus automatically calculates project schedules, described in the *Project Scheduling* section, below. The project schedule orientation, task dependencies, and duration



enable APM Plus to automatically calculate the plan start and finish dates, as well as early and late dates for each task. Slack time is calculated and APM Plus flags the task if it is on the critical path of the project. Start and finish constraint dates for a task can be specified.

A work and holiday schedule must be set outlining daily hours of business and non-working holidays. ActionProgram Manager Plus then utilizes this schedule to accurately calculate the project schedule dates based on a working company calendar.

Task Information

The more information you give ActionProgram Manager Plus about a task, the more accurate the cost information stored in the task will be. At the lowest task level, ActionProgram Manager Plus keeps track of the Baseline plan, the current plan, and the actual costs. For each, it keeps track of planned labor costs, expenses, and if you integrate with BMC Remedy's Asset Management application, capital costs. ActionProgram Manager Plus is the only Project Management system that can be integrated with an asset management system.

In ActionProgram Manager Plus notifications can be set up so the person responsible can be notified about the risk or issue at the right time. Documents can be attached to projects and tasks, cutting down on email clutter and ensuring that important project documents stay with the project.

During the planning phase, the project has a status of Plan and all tasks, summary tasks, and milestones have a status of Hold, as shown in Figure 10. While the task records can be viewed and modified, their status cannot be changed from Hold to a working status (Assigned, In Progress, or Completed) until the project has been approved and the Execute Project button has been used.



The screenshot displays the 'APM:Tasks (Modify)' window. At the top, a table lists various tasks with columns for Task Name, Identifier, WBS, Summary Task, Status, Plan Start Date, Plan Finish Date, Constraint, and Project Name. The task 'Install software on TEST/DEV server(s)' is highlighted in blue. Below the table, the 'APM:Tasks Task00000014384 (Modify)' window is open, showing detailed information for this specific task. The 'Project Info' section includes Project Id (Proj0000000146), Project Name (APM Sample Implementation), Project Status (Plan), and Project Manager (Allen). The 'Task Info' section shows Task Id (Task00000014384), Task Name (Install software on TEST/DEV server(s)), Identifier (Task), Status (Hold), WBS (1.2.1.1), and Summary Task (Onsite Kick-off Meeting). Other fields include Plan Start Date (5/6/2010 7:00:00 AM), Plan Finish Date (5/6/2010 4:00:00 PM), Constraint (ASAP), Priority (500), Duration (1.00), Units (Days), Slack (0.00), Labor Hrs (0.00), Responsible Organization (Engineering), and Responsible Person (marye). The bottom section shows 'Details/Issues' with a list of attachments and metadata such as Created By (APMadmin), Create Date/Time (4/22/2010 3:52:31), Modified Date/Time (4/22/2010 4:05:44), and Last Modified By (APMadmin).

Figure 10 - Task Status

Milestones

A milestone marks the completion of a major activity or segment of a project. A milestone has no duration and has no work performed or logged against it. It serves as an accomplishment marker within a project. Like tasks, milestones can be directly under the project record or can be a sub-milestone as part of a summary task. Milestones are seldom, if ever, used unless they are connected via a Dependency to the completion of a task or summary task.

Summary Tasks

Sometimes an activity in a project is comprised of more than one task or sometimes information for a subset of tasks is rolled up into



a container. The summary task is used to summarize, or group these tasks together within the larger project. Sometimes also referred to as a parent task, no actual work is performed or logged against a summary task. Summary tasks can be at any level, except the bottom most level, in a project. Tasks can be moved to any Summary level by using the down arrow to the right of the Summary Task field. Moving a task in this way automatically regenerates the Work Breakdown Structure (WBS) of the task as well.

Task Work Breakdown Structure (WBS)

ActionProgram Manager Plus organizes tasks, summary tasks, and milestones within a hierarchy called the Work Breakdown Structure. This is an outline field value (1, 1.1, 1.2, 2, 2.1, 2.2, etc.), which describes the order in which the tasks are to be listed on the screen, and charted on Gantt charts. When adding tasks to an existing project, you can specify where in the WBS you want to put the new task. You can also change the WBS of any existing task.

IMPORTANT NOTE: The WBS does not establish a default Finish:Start dependency. The order in which tasks can begin is determined by creating dependencies between tasks in a separate step. The default if no dependencies are specified is that all tasks begin on the project start date.

The original project record is the highest record in the project with all the tasks, summary tasks, and milestones organized beneath it. The top level (task level 0) of the WBS is 1, and identifies all tasks, summary tasks, and milestones that are directly under the original project record. The second level (task level 1) is 1.1, 1.2, 1.3, etc.

An APM Plus project can have up to 36 WBS levels. The sample project in Figure 11 shows how a project WBS might appear.



| APM:Tasks (Modify) | | | |
|----------------------|------------|-----|--------------------------------|
| APM:Tasks - Matching | | | |
| Task Name | Identifier | WBS | Summary Task |
| Sub task 1 | Task | 1.1 | Gather Requirements and Design |
| Sub task 2 | Task | 1.2 | Gather Requirements and Design |
| Sub task 3 | Task | 1.3 | Gather Requirements and Design |
| Sub task 11 | Task | 2.1 | Develop and Test |
| Sub task 12 | Task | 2.2 | Develop and Test |
| Sub task 13 | Task | 2.3 | Develop and Test |
| Sub task 21 | Task | 3.1 | Implement in Test Environment |

Figure 11 - Work Breakdown Structure

Dependencies

The working sequence in which tasks occur in a project is an important element of creating a successful project plan. Establishing this working sequence is known as defining dependencies between tasks. You must define dependencies before APM Plus can accurately perform CPM scheduling for the project.

A dependency has two tasks:

Dependent Task – This task is dependent upon another task's start or finish (its predecessor). A dependent task is sometimes referred to as a successor task.

Predecessor Task – This task has another task that is dependent upon its start or finish.

In APM Plus, a project can have an unlimited number of dependencies between tasks and milestones. If conflicting dependencies are created, APM Plus will generate an error message in the project details field and the offending dependency will be changed to a status of *Invalid* so that it can be corrected in the project plan.

There are four types of dependencies:

- **Finish:Start** – The dependent task cannot start until the predecessor finishes. This is the most commonly used dependency relationship.
- **Start:Start** – The dependent task cannot start until the predecessor starts.



- **Start:Finish** – The dependent task must finish when the predecessor starts.
- **Finish:Finish** – The dependent task cannot finish until the predecessor finishes.

A delay can also be defined as part of a dependency, in effect placing a time gap or overlap between the two tasks. Delays can be either positive or negative.

For example, if Task A and Task B have a Finish:Start dependency with a 2-day delay, this means that Task B is scheduled to begin 2 days after Task A finishes. If the delay was -2 days, then Task B is scheduled to begin 2 days before Task A is scheduled to finish.

Inter-Project Dependencies

Sixteen types of Inter-Project dependency relationships can be defined. The same 4 types above can be used between the following projects and tasks:

- Project 1 to Project 2
- Task in Project 1 to Project 2
- Project 1 to Task in Project 2
- Task in Project 1 to Task in Project 2

Resources

In any organization, your resources – people – are your most important assets. APM Plus tracks resources at two levels: macro and micro.

Macro: When planning future work, you need to consider all proposed projects, decide on the most important ones, and then see if you have the resources necessary to complete those projects. This is a high-level, macro view of resources. At this level you are planning with resources at the skills level, comparing the number of people necessary to do the work with the number of people you actually have.

Micro: Projects that are in the planning or working phases require a more detailed view of resources. The project manager needs to assign specific individuals to work specific tasks at designated



times. Because ActionProgram Manager Plus incorporates a critical path method date calculator to keep project plans current, you know exactly how many resources you need, and when you need them.

APM Plus includes charts and reports that show you how busy each person is, and on what projects and tasks. Time and Expense costs are entered directly into APM Plus by people as they work their tasks, which is the key to keeping the project plan current in real time.

Project Scheduling

Once you've created a project's task information, such as duration, WBS, and dependencies, APM Plus can schedule the project. APM Plus uses the project and task information to calculate the project schedule, and create the project plan.

This section first defines scheduling terms, then walks you through a detailed example, and finally explains the three types of schedules created by APM Plus.

Critical Path Method Scheduling

The Critical Path Method ("CPM") of project management scheduling identifies the tasks that are required to finish within their designated duration, i.e., "critical", for the project to be completed on schedule, and calculates the longest overall duration to complete those tasks. This is the *critical path*. CPM Scheduling is a central functional component of the APM Plus system.

This section describes how the APM Plus Critical Path Method date calculator works, and how each of these dates is calculated.

Critical path method scheduling consists of the 1) the project plan start date or the project plan finish date or the project's target task date, 2) the planned duration of each task, 3) the dependency type relationship between each task, and 4) constraint dates to calculate when the planned tasks that make up the project should start and finish. This information comprises the project plan.

Critical path method scheduling, while intuitive, uses very specific terminology. First we will introduce scheduling terminology, then go through a detailed example in the next section.



Task Duration

A task's duration is how long it takes to complete. The schedule and critical path of a project are dependent upon the duration of each individual task. See the [APM:Task Form](#) for more details.

Task Dependencies

Tasks are linked together in relationships that determine their start and finish order. The schedule and critical path of a project can only be determined after the inter-dependencies of tasks are known. See the [APM:Task Dependencies Form](#) for more details.

Task Constraints

A project's schedule is also dependent upon the constraints associated with each task. APM Plus enables you to enter specific dates for a task and specify how the date should be used. For example, you can specify that a task can start in one of the following ways:

- Must Start On.
- Must Finish On.
- Start No Earlier Than.
- Finish No Earlier Than.
- Start No Later Than.
- Finish No Later Than.
- As soon as possible.
- As late as possible.

Calculated Dates

ActionProgram Manager Plus calculates three sets of dates for every task, summary task, and milestone in a project. These calculations are based upon the project schedule orientation, task duration, and dependency relationships. The three date sets are:



- **Plan Start and Finish Dates** – These are the desired, or target, start and finish dates for a task, summary task, or milestone in a project. Either the task target, project start or project finish date is specified by the project manager.
- **Early Start and Finish Dates** – These are the earliest dates that a task, summary task, or milestone can occur, beginning no earlier than the start date of the project.
- **Late Start and Finish Dates** – These are the latest dates that a task, summary task, or milestone can occur without delaying the finish date of the project.

Slack

Some tasks and summary tasks in a project may have a different set of dates calculated for the early and late date sets (the early and late start dates will be different). The difference between these dates is called Slack. The slack represents the amount of business time that the task can move within the schedule without adversely affecting other tasks' dates or the finish date of the project.

A project's schedule orientation has no impact on how Slack is utilized when working a task. A task is always scheduled to start as early as possible. Its Slack is the amount of time that the task can slip by either starting later or by delays during the duration of the task, which cause the finish date to slip. Users can always look at the Late Finish Date to determine the latest that a task may finish before it causes the project to slip.

Tasks with zero slack are on the critical path of the project and therefore cannot slip without impacting the finish date of the project.

The Critical Path

The critical path of a project is made up of those tasks which, if delayed, would delay the planned finish date of the project, that is, any task that if it slipped, the entire project would slip.

Tasks on the critical path have plan, early and late date sets that are the same. Their slack time is zero.

ActionProgram Manager Plus calculates a project's critical path, and flags those tasks in the project, charts, and reports.



Inter-Project Dependencies

The schedule and critical path of a project may also depend upon the relationship of a task in one project to a task in another project, or the relationship of the entire project to another project or one of its tasks. APM Plus enables you to specify these relationships.

Critical Path Method Schedule Example

This section walks through a very simple project plan to illustrate the concepts used in project scheduling. Our example project plan has 4 tasks with the following durations:

- Task 1 takes 2 days.
- Task 2 takes 4 days.
- Task 3 takes 2 days.
- Task 4 takes 2 days.

In our plan, task 1 will start the project, and when it is finished, both tasks 2 and 3 can start immediately. Only when both tasks 2 and 3 are finished can task 4 start. These are the task dependencies, defined by the project plan.

If we diagrammed this project, it would look like Figure 12:

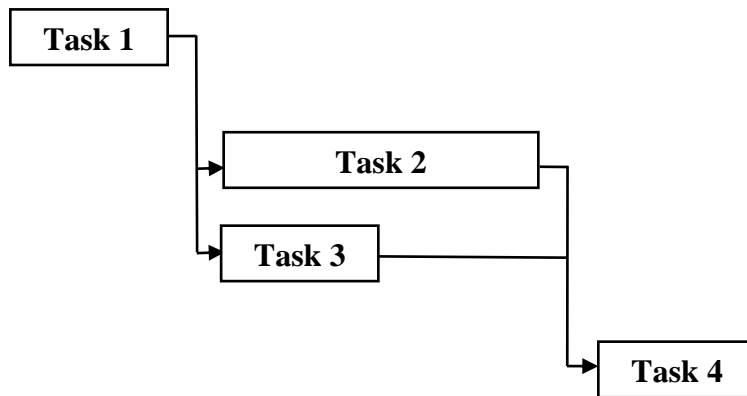


Figure 12 - Simple CPM Example

Notice there is no lag between the end of task 1 and the start of tasks 2 and 3. Similarly, there is no lag between the completion of task 2 and the start of task 4. Task 3 is different. Task 3 has 2 days leeway, as to when it actually finishes without it impacting



the end of the project, i.e., the completion of task 4. This leeway is called slack or lag time.

The other tasks, tasks 1, 2 and 4, have no slack, in that if any of the time it takes to complete any of these tasks changes, the end-date of the project will change. These tasks are on the critical path.

However, if task 3 takes longer than task 2, then task 3 will be on the critical path and task 2 will not be on the critical path. Make sense? This is where the term *critical path method scheduling* comes from. A critical task in this context means that if the time it takes to complete the task changes, the end-date of the project will change.

Project Schedule Orientation

ActionProgram Manager Plus allows the Project Manager to determine how a project will be scheduled by selecting the schedule orientation. There are three selections:

Project Start Date Orientation – The Project Start Date becomes the anchor date for the project. Starting with the planned start date of the project, each task is scheduled to start as early as possible. With Project Start Date Orientation, the Plan Start and Finish Dates equal the Early Start and Finish Dates.

Project Finish Date Orientation – The Project Finish Date becomes the anchor for a project. Starting with the planned finish date of the project, each task is still scheduled to start as early as possible.

Task Target Date Orientation – APM Plus also includes a unique project schedule orientation called Task Target Date Orientation. When a task in the middle of the plan is the key task of the project, such as taking a server offline for upgrades, it may be defined as a target task. When the Schedule Orientation is set to Task Target Date, this task date becomes the anchor for the project, and all other elements of the project are oriented to this date. It is often used for scheduling tasks that require inflexible windows of time. For example, a scheduled server outage for maintenance upgrades.

Neither the start nor finish date is selected for Task Target Date Orientation; APM Plus calculates both dates, based on the Target Task.



When using Task Target Date Orientation without templates, first plan the project and create tasks and dependencies using Project Start Date scheduling. Once all tasks and dependencies have been created, specify Task Target Date Orientation. This method will allow you to see the differences in the project plan with and without the Target Task. It will also avoid the confusion that can result when you select Task Target Date Orientation first. If you select Task Target Orientation first, the Task Target scheduling attempts to calculate dates every time you make a change. The schedule is eventually sorted out, but it's better to avoid it. Templates are inserted with all tasks, durations, and dependencies so they can be immediately used in the Task Target Date method.

IMPORTANT NOTE: Once a project plan is approved, the schedule orientation cannot be changed, except that Task Target Orientation may be used at any time regardless of the original selection.

Schedule Calculator

Critical path method scheduling systems calculate the dates both from the start and finish dates. If you specify a Project Start Date Schedule orientation, APM Plus starts with the planned project start date entered, and uses the planned duration and dependency type relationships to calculate the early start and finish dates for each task until it comes to the last date. That becomes the planned finish date for the project. Then, the system goes backwards from the planned finish date and calculates the late start and finish dates for each task.

The system compares the early start dates for each task and the late start dates for each task. If there is no difference, the task is on the critical path. If there is a difference, the task is not on the critical path, and the difference is the slack, i.e., the amount of time the start of task can slip without impacting the planned end date of the project. When given a start date, APM Plus calculates when the project will end.

Using the Project Finish Date Schedule orientation, the planned finish date is specified rather than the planned start date. APM Plus starts with the planned finish date and calculates the late start and late finish dates for each task, until it comes to the late start date for the first task. Then it calculates the early start and finish



dates for each task, and compares them, determining tasks on the critical path.

The primary difference between these orientations is how the Plan Start, Plan Finish, and Task Target Dates are defined. The following sections build on the example to illustrate the differences in schedule orientation.

Project Start Date Schedule Orientation

Let's first look at the Project Start Date Schedule Orientation. Project Start Date calculates the time needed for each task on the critical path from the specified start date. Let's say that the Project Plan Start Date is the 11th at 8AM, and that task 1 starts first thing on the 11th. The 11th at 8AM is the earliest that task 1 can start, so it is the early start date for task 1.

If task 1 starts on the 11th at 8AM and takes 2 days to finish, the earliest task 1 can finish is the 12th at 5PM (assuming that we are working an 8AM – 5PM work day). So the 12th at 5 PM is the early finish date for task 1.

If task 2 starts immediately after task 1 is finished, the earliest task 2 can start is 8AM on the 13th. The early start date for task 2 is the 13th at 8AM.

Similarly, if task 3 starts immediately after task 1 is finished, the earliest task 3 can start is 8AM on the 13th. The early start date for task 3 is the 13th at 8AM.

If task 2 takes 4 days to complete, the earliest task 2 can finish is the 16th at 5PM. So the 16th at 5 PM is the early finish date for task 2.

Task 3 takes half the time as task 2. Starting the same time as task 2, the earliest task 3 can finish is the 14th at 5PM. That is the early finish date for task 3.

When is the earliest date task 4 can start?

Since both tasks 2 and 3 must finish before task 4 can start, and task 2 takes longer than task 3, the earliest task 4 can start is just after task 2 finishes, which is the 17th at 8AM. The early start date for task 4 is the 17th at 8AM. If task 4 takes 2 days to complete,



the earliest date it can finish is at 5 PM on the 18th. This is its early finish date.

So far, we have calculated the early start date and early finish date for each task of the project. Now our plan looks like the following:

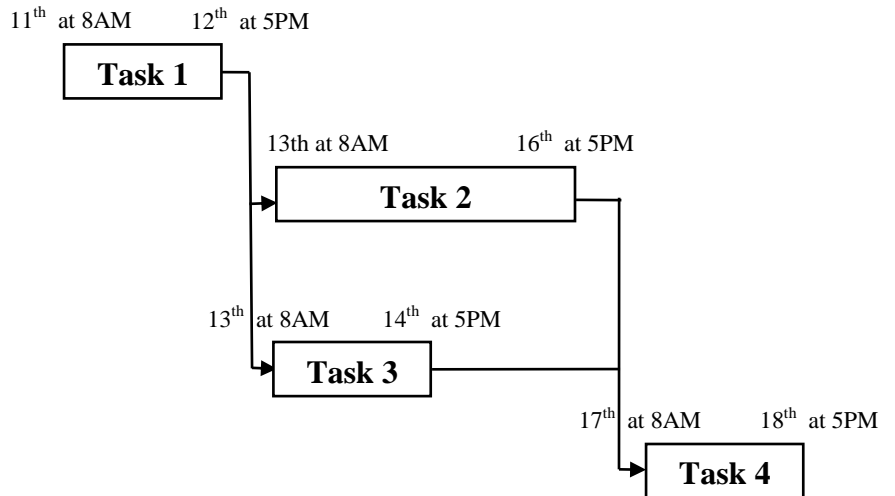


Figure 13 - Project Start Date Scheduling

Now, APM Plus goes backward from the completion date of the last task and calculates the latest time each task can start and finish, i.e., the late start date and late finish date for each task.

If task 4 finishes at 5PM on the 18th, and it lasts 2 days, it has to start on the 17th at 8AM. The 18th at 5PM is the late finish date and the 17th at 8AM is the late start date. These are the latest dates task 4 can start and finish and not impact the end-date of the project.

If task 4 starts on the 17th at 8AM, that means tasks 2 and 3 have to finish by 5PM on the 16th. The 16th at 5PM is the late finish date for both tasks 2 and 3.

If task 3 finishes at 5PM on the 16th, and requires 2 days, it has to start on the 15th at 8AM. The 15th at 8AM is the late start date for task 3. If it starts after this date, it will impact the end date of the project.

For task 2 to finish at 5PM on the 16th, it must start on the 13th at 8AM. Since both task 2 and task 3 can start when task 1 finishes,



task 1 can end on the 12th at 5PM, and if it does, it will start on the 11th at 8AM.

The following table shows the early and late dates and slack for each of the tasks.

| | Task 1 | Task 2 | Task 3 | Task 4 |
|-------------------|--------|--------|--------|--------|
| Task Duration | 2 days | 4 days | 2 days | 2 days |
| Early Start Date | 11th | 13th | 13th | 17th |
| Early Finish Date | 12th | 16th | 14th | 18th |
| Late Start Date | 11th | 13th | 15th | 17th |
| Late Finish Date | 12th | 16th | 16th | 18th |
| Slack | None | None | 2 days | None |

Comparing early and late dates identifies tasks with no slack. Those tasks are on the critical path. Remember, the key is that all dates are calculated so as to start the project on a specific date.

Project Finish Date Schedule Orientation

Often, we know when the project is supposed to finish and we want to calculate when the project has to start. If we use a Project Finish Date Schedule Orientation, a planned finish date is entered. Using it, the system calculates the late start and finish dates for each task starting with the last task in the project plan. It works backwards until it gets to the first task, and determines the planned start date of the project. Then, it works forwards and calculates the early start and finish dates of each task. It compares the early start date and the late start date for each task. If they are the same, the



task is on the critical path. If the early and late dates differ, the task is not on the critical path.

Using the Project Finish date orientation, we start calculating from task 4.

Now, our diagram looks like this. The early start and finish dates are above each task, and the late start and finish dates are below each task. Tasks with no slack have the same early and late dates. Task 3 is the only task that does not have the same early and late dates. All tasks receive planned dates from the early dates. Remember the key is that all dates are calculated so as to complete the project on a specific date. For ease of display we choose project completion date consistent with our Project Start Orientation example.

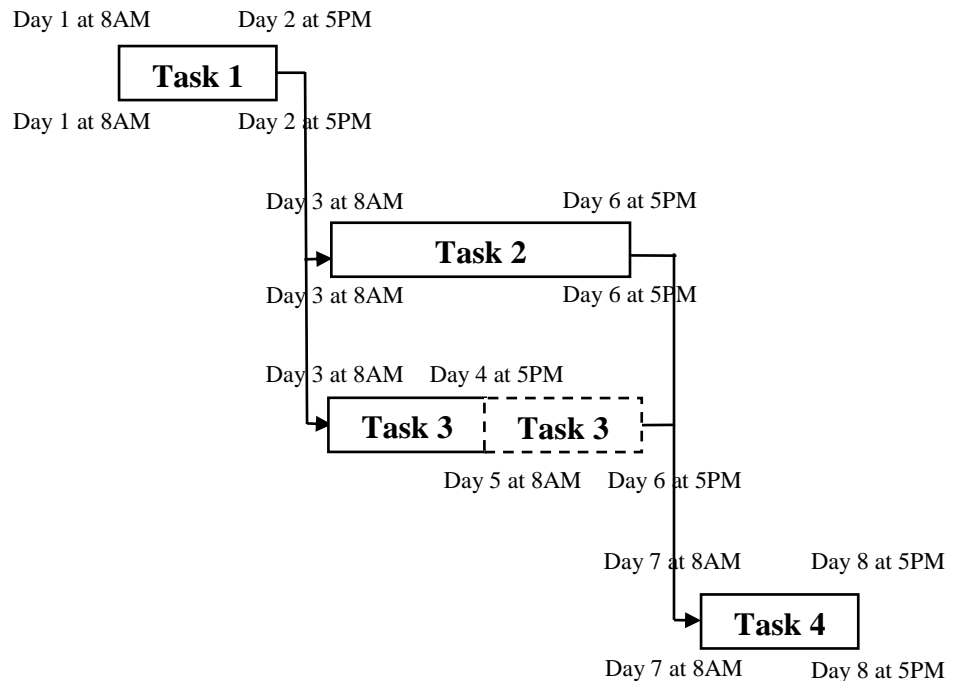


Figure 14 - Project Finish Date Scheduling

Task Target Date Schedule Orientation

If a task in the middle of the plan is flagged to be the key task of the project, it is defined as a target task. When the Schedule Orientation is set to Task Target Date, this task date becomes the anchor for the project, and all other elements of the project are



calculated from this date. Task Target Date scheduling is used for scheduling tasks that require inflexible windows of time.

Task Target Date calculates the time needed for each task on the critical path from the specified date and target task. Returning to the Project Start date example, first let's change its Schedule Orientation to Target Task. Let's say that the Target Task Date is the 10th at 8AM, and that the target task is task 3. Task 3 starts at 8AM on the 10th. The 10th at 8AM is the earliest that task 3 can start, so the 10th at 8AM is called the early start date for task 3, the target task.

We know that if task 3 starts on the 10th at 8AM and takes 2 days to finish, its early finish date is the 11th at 5PM. This is also the late finish date for the target task.

Tasks before the target task use the target task start date as a finish date in a Finish Date Orientation; tasks after the target task use its finish date in a Start Date Orientation.

Now we need to work both forwards and backwards from the target task. Using the Finish Date Orientation to calculate backwards, Task 3, the target task, can start immediately after task 1 is finished. Task 4 can start immediately after task 3 is finished. However, task 2 takes twice as long as task 3, so task 4 can not start until task 2 finishes. Remember, the key is that all dates are calculated so as to start and complete the project consistent with the target date of the designated task. For ease of display we choose a task target date consistent with our Project Start Orientation example.

Now our plan looks like the following:

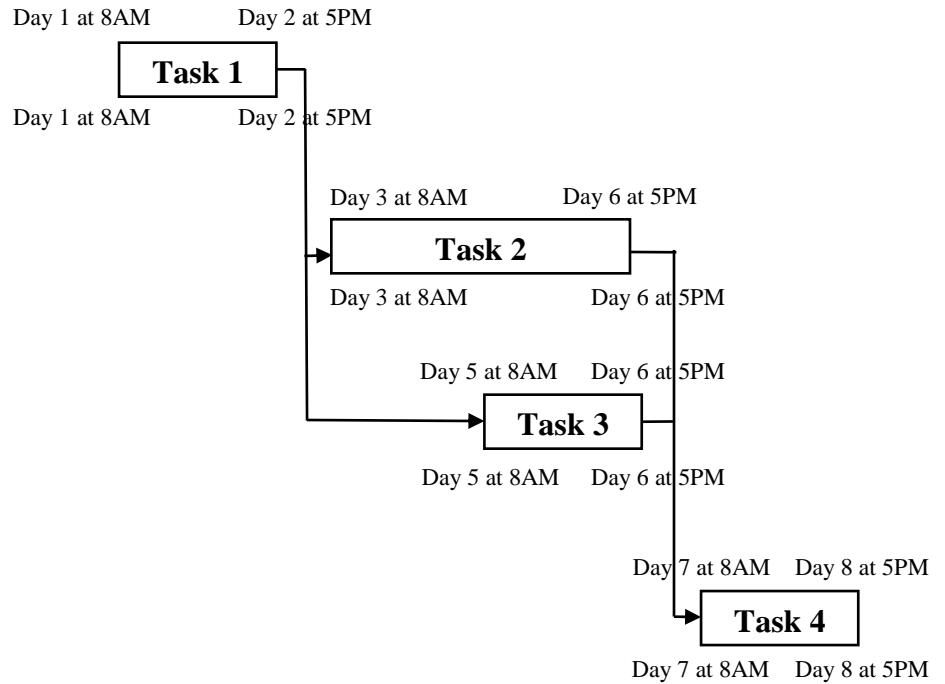


Figure 15 - Task Target Date Scheduling

Planned Start Date and Planned Finish Date

Regardless of the Selected Project Schedule Orientation, the early start date and early finish date are the planned start date and planned finish date.

ActionProgram Manager Plus Project Schedules

ActionProgram Manager Plus uses three separate variations of the project schedule over the course of a project. In addition to the Plan Start and Finish dates, ActionProgram Manager Plus also tracks the Baseline Start and Finish dates and the Actual Start and Finish dates.

Each variation represents a different perspective of the same project plan and it is important to understand the differences. These variations are the following:



- **Plan Schedule** – This schedule is created and modified during the planning phase and can be modified during the working phase. During the working phase of a project the Plan Schedule is used to trigger task work and status changes by using notifications and alerts.
- **Baseline Schedule** – The Baseline Schedule is created at the time a project is moved to *In Process* (by using the Execute Project button). It is a “snapshot” of the Plan Schedule and is the target schedule the project is intended to achieve. The Baseline schedule is the project plan used for comparison in variance reports and charts. It is captured once and cannot be modified.
- **Actual Schedule** – This schedule reflects what has actually occurred during the working phase of a project. The Actual Schedule, with the Baseline Schedule, is used for comparison in variance reports and charts. To maintain accurate tracking records, these dates are captured once, as they occur, and cannot be modified. ActionProgram Manager Plus records the project’s actual start date when the project starts, and records the actual finish date when the last task or milestone changes to a status of Completed.



APM:Projects Proj00000000208 (Modify) Save

ActionProgram Manager Plus Projects

| | | |
|---|---|---|
| <p>Project Name* APM Plus Implementation Sample</p> <p>Description* Demo</p> <p>Project Details</p> | <p><i>Project Id</i> Proj00000000208</p> <p>Risk None</p> <p>Account* 20020 Select</p> <p>Resp. Org* Engineering Select</p> | <p>Recalc Refresh</p> <p>Project Status In Process</p> |
|---|---|---|

| | | | | | |
|---------------------------------------|-------------------|---------------------------------------|-------------------------------------|--------------------------|---------------------------|
| Sponsor/Requestor Last Name+ Trent | First Name Sam | Sponsor/Requestor Organization FSS | Sponsor/Requestor Phone 555-1212 | Add Contact | List Contact |
|---------------------------------------|-------------------|---------------------------------------|-------------------------------------|--------------------------|---------------------------|

| | | | | |
|-------------------------------------|----------------------|--------------------------|--------------------|------|
| Project Mgr. Last Name*+ Crouder | First Name* Allen | Proj. Mgr. Id*+ Allen | Project Mgr. Phone | Ext. |
|-------------------------------------|----------------------|--------------------------|--------------------|------|

Gantt Chart | RM Chart | Create Task | Create Milestone | List Tasks/Milestones | Use a Template

Project Info | Costs-Values | Task Info | Task Summary | Record Info/Documentation | Pools/Programs | Custom Fields

| | | | | | | | |
|---|---|--|--|---|------------------|-------------------|---------------|
| Time Unit Days | Schedule Orientation Project Start Date | Task Notifications Project Approval & Assignment | Business Workday Tag Company | | Base | Duration | 19.00 |
| | | | | | Labor Hr. | 116.00 | |
| | | | | | Cost | 52200 | |
| Project Plan Start Date: 10/1/2010 7:00:00 AM | | | | Project Plan Finish Date: 10/27/2010 4:00:00 PM | Planned | Duration | 19.00 |
| Actual Start Date: 6/28/2010 4:28:55 PM | | | | Actual Finish Date: | | Labor Hrs. | 116.00 |
| | | | | | Cost | 52200 | |
| Project Base Start Date: 10/1/2010 7:00:00 AM | | | | Project Base Finish Date: 10/27/2010 4:00:00 PM | Actual | Labor Hrs. | 4.00 |
| | | | | | Cost | 800 | |

Figure 16 - APM:Projects Form - Schedule Orientation: Project Start Date

APM Plus Features

APM Plus includes a number of features that enable you to drive your project management planning. Templates enable you to define a sequence of tasks, milestones, dependencies, responsible parties, etcetera, once and save this for reuse, saving time and enforcing consistency. Project notes and comments facilitate project communications, keeping this information with the project record, instead of with individuals' email boxes. APM Plus charts and reports give real visibility into a projects status.

Templates

One of the most important features of APM Plus is the use of templates to promote quick project starts and best practices in project management.

A template is a series of tasks (approval tasks or work tasks), and the relationships between them, which is saved and named so it can be used repeatedly. Instead of creating these tasks for each project plan, the information (tasks, relationships, milestones, etcetera) is



specified once in a template, and that template is specified in each project's plan.

Templates are essential for achieving consistent workflow across your organization, maintaining disciplined processes, gathering reliable project metrics data, and accurately measuring performance. Templates promote quick project plan development and best practices in project management.

Whenever a series of tasks is used for multiple projects, those tasks should exist as a reusable template. Breaking down a project into milestones, tasks, and sub-tasks can be a challenge; it is time consuming, detailed work. The APM Plus templates enable you to reuse this effort, allowing you to focus your time and attention on your project, instead of spending precious time and energy reinventing the project management methodology wheel each time.

Templates are defined by APM Plus users who have permission to do so. Several example task templates and approval templates are included with APM Plus. Defining your workflow requirements and processes, and translating these into custom templates for your organization is one of the most important steps in configuring APM Plus. Creating and maintaining templates is described in Chapter 9: Creating Templates.

Types of Templates

There are two types of templates in APM Plus: Approval Process and Work Task. Approval process templates define the tasks for reviewing and approving (or rejecting) proposed projects and project plans. Work task templates define the task structure for the project.

Approval Process Templates define the sequence of approval tasks which need to be reviewed by project managers and other stakeholders. Approval templates define the approval tasks and the order in which approval task notifications will be sent to management for their review (for approval/rejection). Notifications for approval tasks are sent to the approvers only when the approvers prior to them have given their approval. A “downstream” approver will never receive an email if the previous approver rejects the project plan.



If ActionProgram Manager Plus is integrated with other AR System-based applications, workflow can be used to create or update the project form, populate the project form, get the correct template, and create or modify a project plan automatically. This functionality supports good IT governance practices and is part of ITIL.

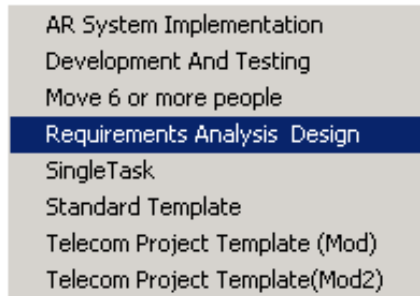


Figure 17 - Use a Template Option

Work Task Templates consist of project milestones, tasks, summary tasks and sub-tasks and their dependencies on each other.

Each task in a template receives a responsible person designation. Generally this is given to the manager or supervisor of the group who is responsible for the task. Using this approach, there is a default responsible party who can request a different responsible party/group and/or assign the working of the task to themselves or the appropriate worker(s).

Pre-Defined Approval Processes

APM Plus provides a mechanism to secure alignment with your business goals and priorities by embedding pre-defined approval processes into each project or each proposed project.

Proposed projects allow a 3 level gated approval process, with one of those gates allowing for a multi-tiered pre-defined approval process. The other two gates gives the project manager, the project planning team and the steering committee oversight and control over the approval and the priority of projects.

APM Plus projects also separate the planning and working phases of a project with a formalized, user-defined project plan approval process.



In APM Plus, project approval is controlled and can only be implemented by a user with approval permission. Upon project approval, a log entry is recorded showing the date, time stamp, and User Login Id. When the project is started (i.e., executed), a Baseline plan is captured and the project formally begins the working phase.

NOTE: Approval tasks are encapsulated in templates that can be used as many times as needed.

Critical Path Method Scheduling

ActionProgram Manager Plus includes a critical-path-method date calculator, which allows you to implement Critical Path Method scheduling in your project plan.

CPM scheduling is essential for effective project and program management. With it you can generate Gantt charts, resource management charts, and crucial reports for managing your projects and resources.

Tasks on the critical path are automatically flagged on the task record, in the Gantt charts, and in reports for instant identification. APM Plus also includes a pre-defined report for tracking critical path tasks.

Custom Fields for Collecting Metrics

With APM Plus, you can define numerous custom fields across projects and/or tasks. Using these fields, APM Plus collects customized end-to-end metrics with exactly the information you need for improved reporting. Custom Fields are configurable data fields that can be named and attached to manager- and user-defined menus. The data is tracked in the database and can be included in reports. The Custom Fields tab, available on the APM: Projects, PMA:ProposedProjects, and APM:Tasks forms, provides two groups of dropdown menus: defined and freeform. Managers create and maintain the defined menus. End-users maintain the freeform dropdown menus. Users simply enter a new value and select Save, and the value is added to the list for all users to select from.



Charts and Reports

The ability to generate up-to-date project reports is one of the main benefits of APM Plus. Project data is available through numerous charts and pre-defined reports. This visibility allows management to cut costs and improve performance over time by making meaningful comparisons and analysis. Charts and reports are used during every phase of the project life cycle, providing the information necessary for effective management.

ActionPortfolio Manager Plus includes a robust and very easy-to-use charting and dashboard capability that lets you view the project data and also includes drill-down Gantt charts.

A chronological log of events and notes is maintained for individual tasks and the entire project through the Details field for task and project records. Entries made at the task level are accessible at the task, summary task, and project records, providing a convenient snapshot of a project and its tasks.

Reports provide critical project and task information in pre-defined formats, which can later be printed for specific business reporting requirements. The Gantt charting function is incorporated onto the application forms for a real-time view of the project. Both standard and comparative Gantt charts are included.

Resource Management

APM Plus supports resource management through task assignments, and resources, skills, locations, and group associations. Resource management charts are provided with multiple detailed summary views.

APM Plus is server-based so anyone on the network with the AR System user tool and permission can view and work on a project, regardless of their physical location. Screen views will contain different fields of information based on the role of the logged in user (project manager, program manager, worker, etc). Available reports will also be different based on the role of the logged in user.



Time-at-Task and Expense Tracking

The APM Plus time and expense tracking functionality can be added to all of your AR System-based applications so the same tool can be used for time and expense tracking across all AR System applications. Projects are updated in real time as workers complete tasks and enter work time-at-task in the easy-to-use time and expense tracking forms. Furthermore, users do not have to learn every feature of the application to complete their tasks and enter their time.

APM Plus enables the tracking of the hours required for planning and implementing each task in a project, as well as the expenses. Planning entries are captured in the Baseline plan upon project execution. One or more users can log actual work time against specific tasks. Work time and expenses are totaled for tasks, summary tasks and the entire project.

Time and expenses against help desk tasks or change tasks can be entered using APM Plus and the same universal timesheet that is used to enter time and expenses against project tasks.

Project Notes and Comments

During the working phase, important notes and comments can be chronicled in the project. The Project Details and Task Details fields, as shown in Figure 18, serve as a chronological notepad for the project. Entries made in the Task Detail field are automatically rolled up through higher summary task levels and into the original project record. A Project Manager can make notations in the Project Details field about issues and other changes to the project that will prove helpful during the review phase. All status changes to the project are logged in the Project Details field. If a new task or milestone is added during the working phase, it is logged in the Task Detail field and rolled up, as appropriate, through the project.

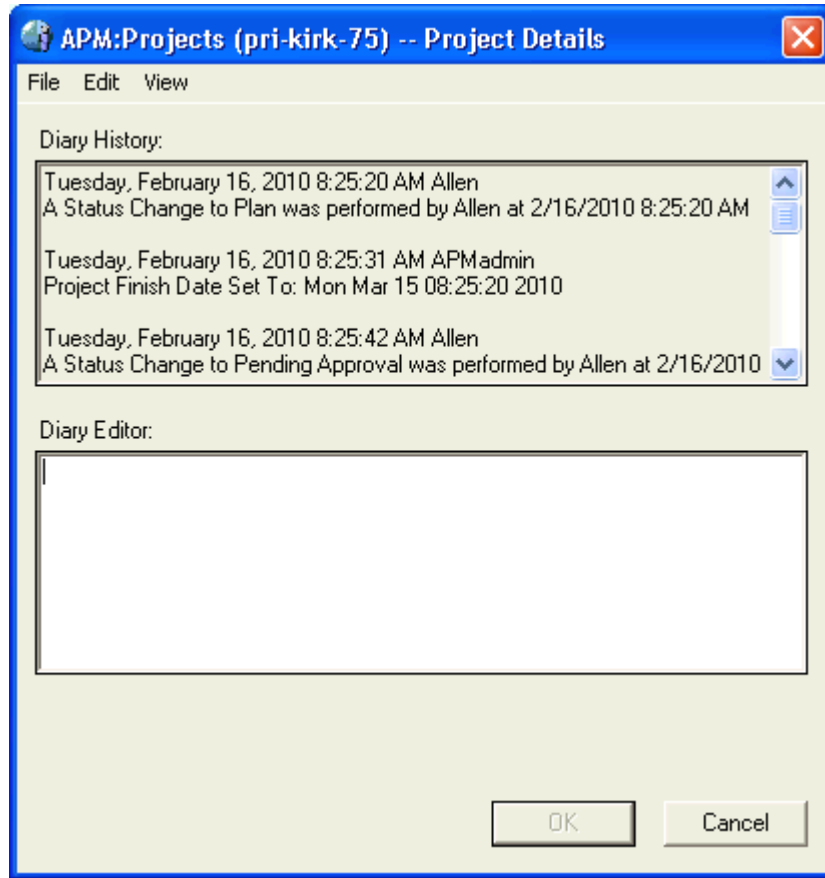


Figure 18 - APM:Projects Form > Project Details field Diary

Automatically Calculated Project Schedule

APM Plus automatically calculates the project schedule, including the calendar duration and the early and late start and finish dates of each task. A project can be created based on a target date, start date or finish date by selecting the schedule orientation. Specific constraint dates may be manually entered for any task. Durations must be entered for each task. APM Plus will automatically calculate the schedule using these values. These values can later be modified if needed. Projects can be planned in time units of hours or days, but APM Plus does not allow some tasks with one choice and some tasks with another choice.

Baseline Plan

A Baseline plan is captured when a project is executed. It is comprised of the planned start and finish dates, duration, and



planned labor hours of the approved project plan. If a proposed project was used to define the project plan it would also contain the labor hours associated with the definition phase. The Baseline plan is used in the Gantt chart and reports for comparison and calculating variances with the actual plan implemented.

Work Schedule and Holidays

APM Plus accounts for a business' unique work and holiday schedule when calculating a project's schedule. A working business schedule (Monday through Sunday) and an annual closed holiday schedule must be specified, increasing the accuracy of the project schedule.

Re-Planning

Changing project requirements and schedules are accommodated through the re-planning capability in APM Plus. If the project plan is denied approval, the project manager can easily modify the plan as needed. After this re-planning the project must be resubmitted for another round of approvals. This may be done as many times as necessary.

After a project is *In Process* if conditions change sufficiently to require a change in the project plan the changes are simply made and the planned dates, costs, etc. will be changed. No approvals are required during the working phase.

Project Pools and Programs

APM Plus provides a mechanism to group projects together into a program and/or pool(s) for reporting purposes; comparative Gantt charts can be run on projects that are grouped together.

Dependencies

Dependencies are defined between tasks and/or summary tasks and/or milestones to ensure that a project is implemented on the right schedule and in the right sequence.



Risk Management

APM Plus provides risk management functionality by allowing project owners to associate risks and issues on both projects and/or tasks.

Project Roles

Whether the project is large or small, project management has different roles or functions, which contribute to the effective planning and successful completion of each project. The application defines them separately; however in reality, a single person may have responsibility for multiple roles.

These roles are not necessarily related to unique ARSystem user / group permission values.

The project roles in ActionProgram Manager Plus are:

- Administrator (Not covered in this manual)
- Program Manager
- Project Sponsor/Stake Holder
- Project Manager
- Project Approver(s)
- Task Responsible Organization
- Task Responsible Party
- Assigned Worker(s)

Program Manager

The functionality associated with Action Portfolio Manager (Proposed projects, charting, inventory, dashboards, etc.) is generally managed and controlled by this role.

Project Sponsor/Stake Holder

The Project Sponsor/Stake Holder originates the need for the project. Sponsor information is documented in the original project record.



Project Manager

The Project Manager has responsibility for the project: planning, managing, and measuring results. Accordingly, the Project Manager role has the highest level and broadest scope of authority in the ActionProgram Manager Plus application.

In this role, the Project Manager controls the original project record. He/she creates and defines project data such as the start or finish of the project, the schedule orientation, the time unit for scheduling, plus task notifications and status. The Project Manager can plan the entire project or manage a team in the planning process.

Once a project enters the working phase, APM Plus provides timely information about a project's progress through automated notifications and alerts, and detailed reports and charts. Only a program manager or project manager may create a project, and once a project is created, only the assigned Project Manager may modify the project plan, including adding tasks and milestones, changing dates, and duration. The assigned Project Manager information is documented in the original project record.

Project Approver (s)

Project approval is an important event in APM Plus workflow. In the application, approval is a prerequisite step in the transition from the planning to working phase, but in a business organization it is also a formal commitment of resources. It is not the final step before the working phase because APM Plus recognizes that there may be a delay between the approval step and the point at which the project manager wants to officially notify people of task assignments. The working phase officially is started when the project manager uses the Execute Project feature and places the project into an In Process status. ActionProgram Manager Plus manages this event through special permission-based assigned tasks via the approval button. The approval is logged in the Project Details Field on the original project record

Task Responsible Organization Manager

Each task is assigned to a group with overall responsibility for completing the task. Each group has a designated manager or leader. In some organizations, the Project Manager may



participate on a team during the planning phase and assign tasks to specific staff. In other organizations, the manager of the Performing Organization, i.e., the Task Responsible Organization, assigns people through the Project Manager to work the tasks.

Notifications and alerts associated with the task record are issued to the Project Manager or to the Task Responsible Party, i.e., the person responsible for the task. A Task Responsible Organization must be specified for each task.

Task Responsible Party

The Task Responsible Party is a member of the Task Responsible Organization who has been given specific responsibility for the task. The Task Responsible Party has primary responsibility for managing the task work on schedule and for maintaining accurate information in the task record.

Any worker may work on and log time against a task, however only one can be assigned management responsibility as the Task Responsible Party. The Task Responsible Party receives all notifications and alerts associated with the task record. The project manager specifies the Task Responsible Party and can re-assign the task to another member of the any organization during the project.

Each task must have a Task Responsible Party. During task creation (either an actual task or a template task) APM Plus automatically defaults the Task Responsible Organization manager as the Task Responsible Party for the task.

Assigned Worker(s)

An Assigned Worker is someone that works on a task but may not be specifically assigned management responsibility for its successful completion.

Project Costs

APM Plus provides up-to-date project cost information in four budget fields on the PMA:ProposedProjects form, APM:Projects form, and APM Tasks form: Estimate, Proposed, Planned Cost,



and Actual Cost. Use these fields for performance management and for improving proposed project estimates in the future.

Project costs are calculated from rates that are entered by the Software Administrator during APM Plus installation and setup.

APM Plus first uses the 'Task Responsible Persons' rate when calculating costs. If task's assigned resources further define the individuals who will work on the task, APM Plus uses those entries in the following order:

- If specific people are defined for specific hours, APM Plus uses those rates times those hours.
- If Required Resource assignments are made, then the remaining hours are calculated at the skill rate wage associated with those remaining hours.
- The remainder of the time otherwise unaccounted for is calculated using the responsible person rate.



Chapter 2: Working with APM Plus

- Basic BMC Remedy AR System® Functionality
- ActionProgram Manager Plus Navigation
- Common APM Plus Form Features
- Common APM Plus Form Actions
- APM Plus Forms Quick Lookup
- Charts & Reports
- Different BMC User Interfaces for APM Plus: Fat or Thin Client

Basic BMC Remedy AR System® Functionality

Although this user guide does not document the BMC AR System®, we include some of the following descriptions of basic AR System functionality for convenience:

- All fields that have labels with a **bold** font require data entry in order to save records/data. (See BMC documentation for the meaning associated with special characters appended to fields with **bold** fonts.)
- On the upper-left-hand side of the screen, the AR System title bar will indicate whether the user is in Search or New mode, and the name of the form the user is currently viewing.
- Forms (screen views) in Search mode and in New mode look the same, with the exception of the title bar and possibly the color.
- Search mode is indicated by a Search button in the upper-right-hand corner of the screen (in the AR System title bar).
- New mode, for saving time entries, will also be indicated by a button that reads Save in the upper right hand corner of the screen (in the AR System title bar).



- In Search mode, data may be entered in any single field or group of fields on which to search. For example, simply enter a name in the Name field and click the Search button. This will return all data entries with the selected name. This feature is called “Query By Example.”

ActionProgram Manager Plus Navigation

This section describes how to navigate through ActionProgram Manager Plus.

- Using the APM:Navigation Form
- Using the AR System Menus

Using the APM Navigation Form

If you are new to Remedy, or just wish to work from within ActionProgram Manager Plus, the APM Navigation form provides a quick, convenient, color-coded method for opening the APM Plus forms, charts, and reports you need to do your work. The APM Navigation form provides a series of menus, submenus, and dialog boxes to give you access to forms you need and to view reports and charts.

Open the APM Navigation form

1. On the AR System Home Page, click the APM:Navigation link.

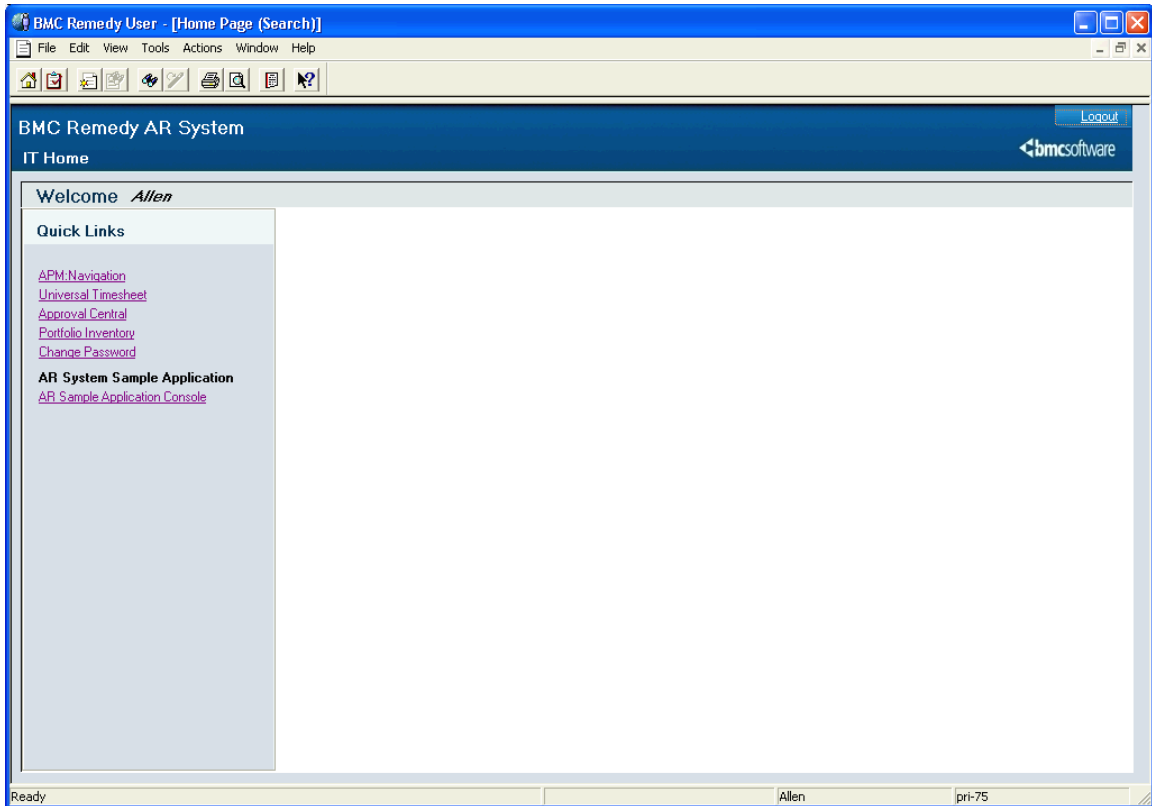


Figure 19 - Remedy AR System Home Page

2. The APM Navigation form opens, displaying the Main Menu, as shown in Figure 20.



Figure 20 - APM Navigation form Main Menu

Use this navigation menu to access the main APM Plus forms, charts, and reports. The buttons on the APM Navigation form menus are color-coded:

Red = Functions

Blue = Charts and Reports

Gold = Administration

Using the AR System Menus

If you are familiar with the AR System environment, you will probably feel comfortable navigating through APM Plus using the native menu structure.

This is not always an appropriate method to use because there are cases where required workflow is necessary to provide some APM Plus functionality. This method should only be used by those who have a thorough knowledge of the APM Plus product.

Open an APM Plus Form Using the AR System Object List:

1. Click File > Open > Object List. Or click Ctrl O.



The AR System Object List opens, as shown in Figure 21.

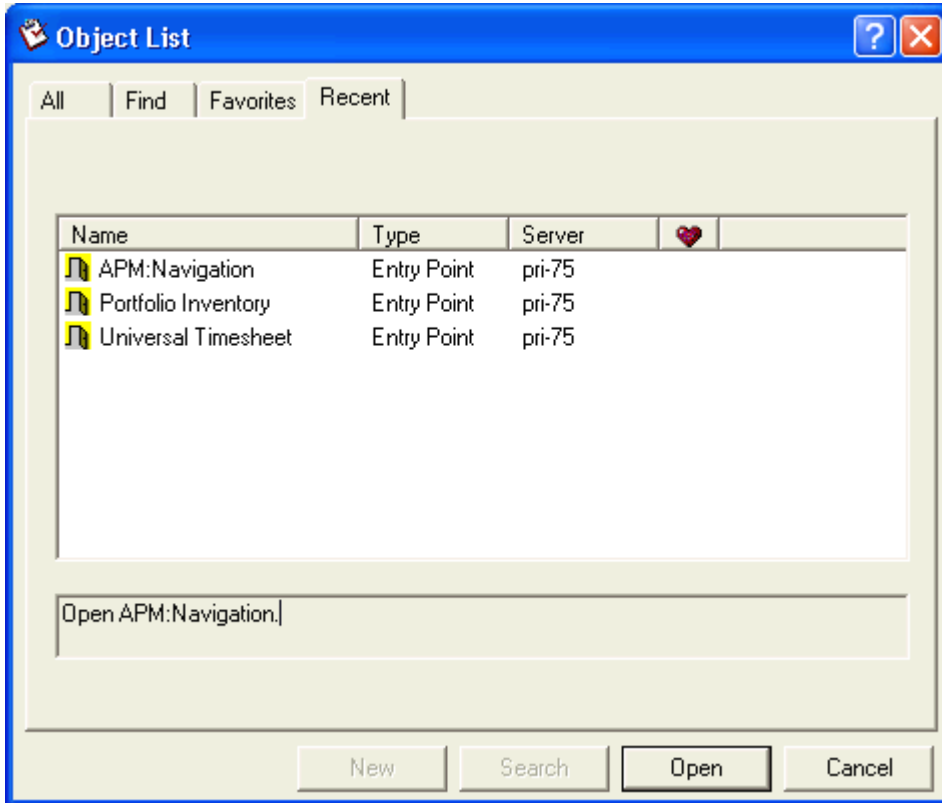


Figure 21 - AR System Object List, Recent

2. Select the APM Plus form you wish to open. The All tab includes all forms, and the Recent tab includes forms you've opened recently for convenience.
3. Click the New or Search button.

The AR System Home Page window closes, and the APM Plus form you selected opens in either New or Search mode depending on which button you clicked.

Common APM Plus Form Features

Most APM Plus forms include buttons that open related projects, tasks, dependencies, or lists that you can choose from. The interface is very intuitive and consistent, and you will get the hang of moving around the application very quickly.

The following features are available on many APM Plus forms:



Selection List Down Arrow

Click the down arrow button to open a dropdown selection list, or open a separate Selection List window, presenting possible values for the field.



Display Field Contents

A button with 3 dots to the right of a field indicate a text field that can be opened in an expanded window. You may enter as much information as you wish in these fields but these fields may only preserve a fixed number of characters depending on the field. Click to display the complete contents of the field.



Diary Empty

Blank diary indicates there are no diary entries.



Diary Entries

Lines of "text" on the icon button indicate there are date/time-stamped project diary entries. To view them, click the diary button.

*

Bold field label with an asterisk indicates a required field.

+

Field label with a plus sign indicates that workflow occurs on that field.

Common APM Plus Form Actions

- Save Button located in the upper right. Some buttons, tabs, and fields are not active until after Save and some fields may be “read only” before and/or after Save.
- Refresh button or F5 Redraws screen with current data.
- Recalc Runs the CPM scheduling (generally this is not needed since CPM is automatically run as needed).
- Modify Multiple Objects Select group from a list, such as multiple tasks in the task list. Select Modify All from the BMR Actions menu. Edit the desired fields. Click the Save button. Confirm action in dialog.



Close window To close an open window, click on the X in the upper right hand corner of the individual window (see difference in Thin Client for this feature), or in some forms click the Cancel button.

See the final section in this chapter, *Different BMC User Interfaces to APM Plus: Fat or Thin Client*, for information on how to use the application in a Web environment.

APM:Projects Form Toolbar

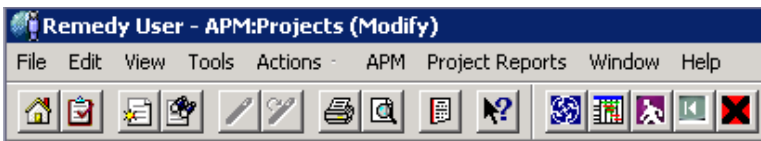


Figure 22 - AR System and APM Project Record Toolbar

The first buttons on the toolbar belong to Remedy. The APM Projects Toolbar buttons are described below:



Reports

AR System Button on toolbar.
Opens the APM:Projects Report Styles form.



What's This?

AR System Button on toolbar.
Changes the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed.



About PRI

Button on toolbar.
Displays an information box about Project Remedies, Inc.



Gantt Chart

Button on toolbar.
Initiates a Gantt chart for the active project record.



List Related Approval Records Button on toolbar.

Opens the Matching APM:ApprovalTasks form, which displays the approval process information for the displayed project.



My Last Submitted Project Button on toolbar.

Opens the last submitted project record based upon the User Login Id.



Cancel Project

Button on toolbar.

Opens a dialog asking whether you really wish to cancel the project. Click Yes or No.

APM:Tasks Form Toolbar

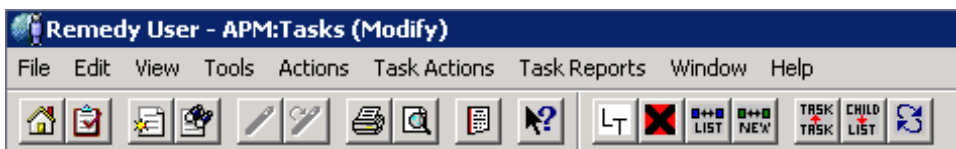


Figure 23 - AR System and APM Task Record Toolbar

The first buttons on the toolbar belong to Remedy. The APM Task Toolbar buttons are described below:



Reports

AR System Button on toolbar.

Opens the APM:Tasks Report Styles form.



What's This?

AR System Button on toolbar.

Changes the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed.



My Last Task

Opens the last submitted task record based on the User Login Id.



Cancel Task

Opens a dialog asking whether you really wish to cancel the task. Click Yes or No.



List Dependencies

Available for existing task records.

Opens a query list of all predecessors for the active task record.



Create New Dependency

Available for existing task records.



Opens a submit window in the APM: TaskDependency form.



Open Summary Task

Opens the task record for the summary task of the active task record.



List Sub-Tasks/Milestones

Available for existing task records.

Opens a query list for sub-tasks and sub-milestones of the active task record.

APM Plus Forms Quick Lookup

This section provides a quick lookup reference for the most common APM Plus forms and for the APM:Navigation form options that open them. Forms are also described in the step-by-step instructions in the chapters that follow. They are listed below in alphabetical order by form name.

| APM PLUS FORM | TO OPEN |
|--|---|
| APM:Approval Tasks | APM:Navigation > Approve |
| APM:ApprovalTemplate and APM:ApprovalTemplateTasks | APM:Navigation > Admin > Templates > Approval > Create (or Modify) |
| APM:ProjectPools &Programs | APM:Projects form > Pools/Programs tab. In the Pools and Programs tables on the right side of the tab, double-click on the specific Pool or Program you want to view. The APM:ProjectPools&Programs form opens for that pool or program. |
| APM:Projects | To open a New APM:Projects form: APM:Navigation > New Project > Active To open an existing APM:Projects form: APM:Navigation > Update Project > Active Project To search for an active project: APM:Navigation: > Update Project > Query |



| APM PLUS FORM | TO OPEN |
|---|---|
| | Active. The APM:Projects form opens in Search mode. |
| APM:Resources (Configure Dashboard) | <p>From the APM:Navigation form: Charts button > Inventory Query</p> <p>PMA:Chart Definitions Form > Perform Query</p> <p>PMA:Inventory Form > Configure PPM</p> <p>PMA:Configuration Form > Configure Personal Dashboard</p> <p>The APM:Resources Form opens</p> |
| APM:Risk Management Inter-Project Dependency | APM:Tasks form > Dependency Tab > Create IPD (or Modify IPD to open existing inter-project dependency) |
| APM:Task Dependency | <p>APM:Tasks form > Dependency tab > List Dependencies</p> <p>Or click on List Dependencies on the Toolbar:</p> |
| APM:Tasks | <p>There are two main ways to open a task record:</p> <p>A: APM:Projects form > Task Info tab > Double click on a task to open it in the APM:Tasks form.</p> <p>B: APM:Projects form > List Tasks/Milestones button > Select List Entire Project.</p> |
| Charts | APM:Navigation > Charts |
| PMA:Chart Definitions Form Chart Definition View | <p>From the APM:Navigation form: Charts button > Inventory Query ></p> <p>The PMA:Chart Definitions Form, Chart Data Selection Criteria > Perform Query</p> <p>The PMA:Inventory Form > Either Create Chart OR enter a 'Chart Title' and Modify /</p> |



| APM PLUS FORM | TO OPEN |
|--|---|
| | View The PMA:Chart Definitions Form opens |
| PMA:Chart Definitions Form Query Definitions View | From the APM:Navigation form, select Charts button > Inventory Query The PMA:Chart Definitions Form opens, Chart Data Selection Criteria |
| PMA:Configuration Form | APM:Navigation Form> Charts > Inventory Query button PMA:Chart Definitions Form, Chart Data Selection Criteria > Perform Query PMA:Inventory Form > Configure PPM The PMA:Configuration Form opens |
| PMA:Inventory Form | From the Remedy Home Page select Portfolio Inventory link OR From the APM:Navigation form select Charts > Inventory Query > PMA:Chart Definitions Form, Chart Data Selection Criteria > Perform Query The PMA:Inventory Form opens |
| PMA:Resource Configuration Form | From the APM:Navigation form, Charts button > Inventory Query button > PMA:Chart Definitions Form, Chart Data Selection Criteria > Perform Query button PMA:Inventory Form > Configure PPM button PMA:Configuration Form > Configure Enterprise Resources button The PMA:Resource Configuration Form opens |
| PRI:Approve Time & Expense | APM:Navigation > Time Entry > Approve T&E |
| Reports | APM:Navigation > Reports |



| APM PLUS FORM | TO OPEN |
|-------------------------------------|---|
| Time & Expense Tracking (timesheet) | APM:Navigation > Time Entry > Timesheet |

Charts and Reports

ActionProgram Manager Plus includes numerous charts for viewing proposed project information during all phases of the project life cycle. This detailed visibility into project data at any time during the project is one of the most powerful features of APM Plus, because project visibility is what makes it possible to achieve your project management goals.

Use the powerful charting tool during the proposed project phase for up-to-date information on resource availability. This includes pie charts, bar charts, and line charts. A custom chart dashboard can be set up to display the 4 charts you need the most often.

During the project planning, plan approval, and working phases use the Gantt charts and pre-defined reports for reviewing project plans. Pre-defined reports provide hard-copy detail set forth in the various task and milestone records. The numerous custom menu options and custom fields provide the means to collect any and all metrics of importance to your organization, which may then be included in charts and/or reports.

See Chapter 8: viewing a Project for instructions on how to use the APM Plus charts and reports to view project information.

Charts and Personalized Dashboards

One of the main benefits of the APM Plus charts is to give management useful and reliable tools to determine resource availability when creating proposed projects. These charts include menu item categories as well as enterprise resource information (People, Skills, Locations). Managers can set up their own customized chart dashboard for quick access to the 4 charts they use most often.



Gantt Charts

ActionProgram Manager Plus features integrated Gantt charting to provide a graphic presentation of the project as it is being planned and worked, illustrated in Figure 24. This charting can be accessed through the original project record or any task record in the project. Gantt charts are available during the planning, working, and reviewing phases of a project. However, the data used to build the chart will vary in each phase, and is unavailable for proposed projects.

A Gantt chart generated in the planning phase utilizes the Plan Dates of the proposed project and its tasks. During the working phase, the chart truly reflects the progress of the project at the time. It uses a combination of Plan and Actual Dates since some of the tasks will have already started, even possibly finished. Based on the date the Gantt chart is created, it will use Actual dates for tasks with a status of Completed. Those tasks with a status of Hold or Assigned will be displayed based on the Plan Dates since no actual activity has occurred. The tasks that have a status of In Process will use the Actual Start Date and the Plan Finish Date. Gantt charts generated during the review phase will be generated using only the Actual dates.

The Comparative Gantt chart compares the baseline to the above described chart. Comparative charts have two lines per each task where the first line contains data as described above and the second line shows the same task with its baseline values.

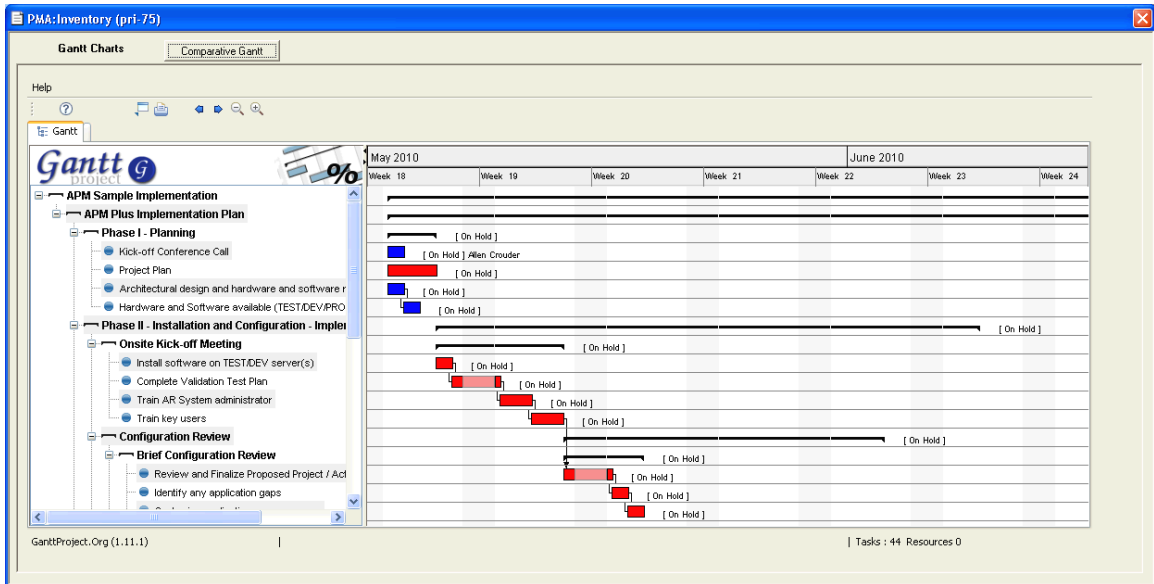


Figure 24 - Gantt Chart of a Project in Planning

Comparative Gantt charts can also be generated for projects that are grouped together into a program and/or pool(s).

Resource Charts

APM Plus includes charts for viewing the status of project resources for ongoing visibility as projects are being worked.

Pre-defined Reports

The following reports are included with ActionProgram Manager. They are described in greater detail in Chapter 8: Viewing a Project.

Details

- Project Summary Provides a one-page summary of a project's progress and success.
- Manager Cost Summarizes each project manager's progress.
- Details Provides a detailed summary of all tasks and milestones in a project.



Management

| | |
|----------------|---|
| All Complete | Provides a list of all projects whose status is Completed. |
| All In Process | Provides a list of all projects whose status is In Process. |
| All Pending | Provides a list of all projects whose status is Pending. |
| Manager Cost | See above. |
| Program Cost | Provides a summary of program costs. |

Hours/Time

| | |
|---------------|--|
| New Project | Provides a list of all newly created projects. |
| Critical Path | Provides a list of all tasks on the critical path of the project. |
| Variance | Provides a summary comparison of the Base Start and Base Finish and Actual Start and Actual Finish dates for all tasks in a project. |
| Not Finished | List of all projects that should have finished by now. |
| Not Started | List of all projects that should have started by now. |

Workload

| | |
|----------------------|--|
| Group Task | Provides a detailed summary of all tasks assigned to a particular group. |
| User Task Assignment | Provides a detailed summary of all tasks assigned to a specific user. |
| Work Time | Provides a detailed summary of the work time budget. |

Cost

| | |
|--------------|--|
| Snapshot | Detailed summary of projects with status In Process or Completed. It includes warning and critical variance threshold figures. |
| Money Spent | Provides a detailed summary of the money spent on projects. |
| Program Cost | Provides a detailed summary of program costs. |



Manager Cost See above.

Other reports

Worker Weekly Time Report

Detailed report of a worker's weekly work time hours.

Project Time Report Provides a detailed summary of all work time entered for a project.

Sick/Vacation Time Used Report

Summary report of all the non-work hours entered during the selected time period.

Different BMC User Interfaces to APM Plus: Fat or Thin Client

APM Plus users can choose between the two BMC types of clients: fat, or the console client, and thin, or the Web-based, client. The screenshots in this User Guide depict the fat client version. The thin version of the client software is very similar in functionality although it looks slightly different.

The location of the Save button and method for Refreshing may be different. To Refresh in the this client use the Refresh button on your browser. The big difference is that the thin client does not include the standard Remedy menu or icon toolbar, nor the APM Plus toolbar. Use the Admin Console to open forms if needed.

