

# Program Management with CS PME based on Microsoft Project Server

Cross-project links with CS PME

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# CS Program Management Extension (CS PME)



## Requirements

- Link multiple projects and exchange information between these projects
- Increase reliability by automation of data flow
- Exchange deadlines and other dates as well as additional information
- Use 'soft links' to prevent direct changes of the schedule
- Update projects automatically (reduce delay while opening a project plan)
- Get push notifications on external changes (while working with the project)
- Consolidate linked information (e.g. latest date will be provisioned)
- Allow delegations (rough planning on higher level, details on lower levels)

## Approach

- Create task links across projects using CS PME
- Exchange information automatically (predefine mechanism distributes dedicated information)
  - Rollout of information top down into the entire program and consolidate it from the lowest to the top level
  - Delegate tasks from top level to lower levels where this task is detailed
- CS PME features a server-side calculation and update of projects to reduce the time to open a project
- Changes of project schedule only take effect after project manager's confirmation ('soft links')

## Benefit/ Added Value

- **Cost savings** by automation of data exchanges – expensive manual data consolidation is now history!
- **Reliability** of data quality – information within your programs is error-free and up to date – at all times!
- **Transparency** on changes – project managers see all deviations of external drivers and are able to act!
- **Flexibility** of the product – configure individual data flows and customize the product to meet your needs!

Easily create an external link: Select task in own project, open dialog, select external task and link it!

## Product features: Link tasks

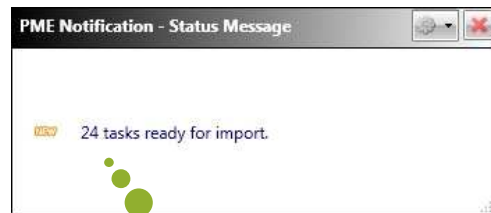
The screenshot shows the 'Manage Links' dialog in the CS PME application. The dialog has a title bar 'Program Management Extension - Manage Links 'Implement EPM - b MSP core system''. Below the title bar, there's a section 'CS PME Links' with a description 'Delete links between the selected task and tasks in other projects.' and a 'Manage Filter' button. A dropdown menu shows '01: Manage Parent'. Below this is a table with columns: Project Name, ID, Task Name, Finish, Comment, Deadline, Program, Task Level, Summary, and Milestone. The table contains five rows of tasks. A green cloud with the text '(1) View current task' points to the first row. Another green cloud with the text '(2) Select external task' points to the third row. A third green cloud with the text '(3) Link them' points to the 'Create Link' button at the bottom. A fourth green cloud with the text '(4) Navigate through project' points to the 'Next' button at the bottom. The bottom of the dialog has a status bar with the text 'Campana & Schott IT Solutions GmbH - CS.PME.Addin.LinkTasks v.4.2.0.37'.

Project Name	ID	Task Name	Finish	Comment	Deadline	Program	Task Level	Summary	Milestone
Implement EPM - a Program Plan	1	EPM Start	2011-05-05	Start MS	2011-05-12	Soft	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>
Implement EPM - a Program Plan	2	Deploy MS Project core system	2011-06-15	Core System	2011-06-22	Soft	1	<input type="checkbox"/>	<input type="checkbox"/>
Implement EPM - a Program Plan	3	Deploy CS PSR	2011-06-29	CS PSR	2011-07-06	Soft	1	<input type="checkbox"/>	<input type="checkbox"/>
Implement EPM - a Program Plan	4	Deploy CS PME	2011-07-06	CS PME	2011-07-13	Soft	1	<input type="checkbox"/>	<input type="checkbox"/>
Implement EPM - a Program Plan	5	EPM finished	2011-07-06	Finish MS	2011-07-13	Soft	1	<input type="checkbox"/>	<input checked="" type="checkbox"/>

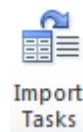
Campana & Schott IT Solutions GmbH - CS.PME.Addin.LinkTasks v.4.2.0.37

# Import tasks: Get notification if new tasks are available, select tasks and import to current project

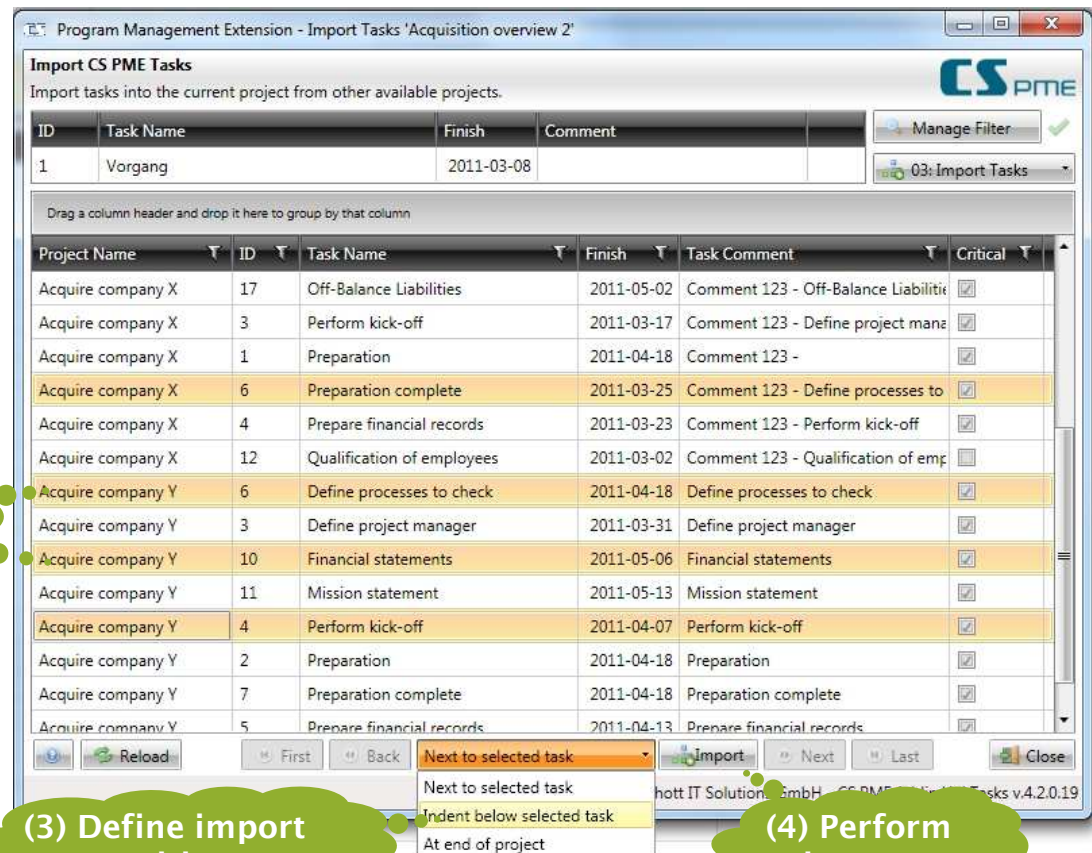
## Product features: Import tasks



(1) Notification:  
Don't miss any  
new tasks



(2) Select  
(multiple) tasks



(3) Define import  
position

(4) Perform  
import

# Rollout deadlines top-down and consolidate latest finish dates bottom-up

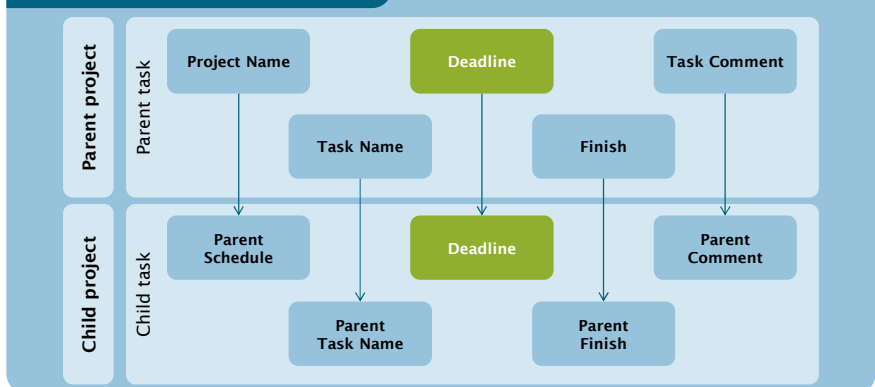
## Use case 1: IT infrastructure rollout program

### Functional setup

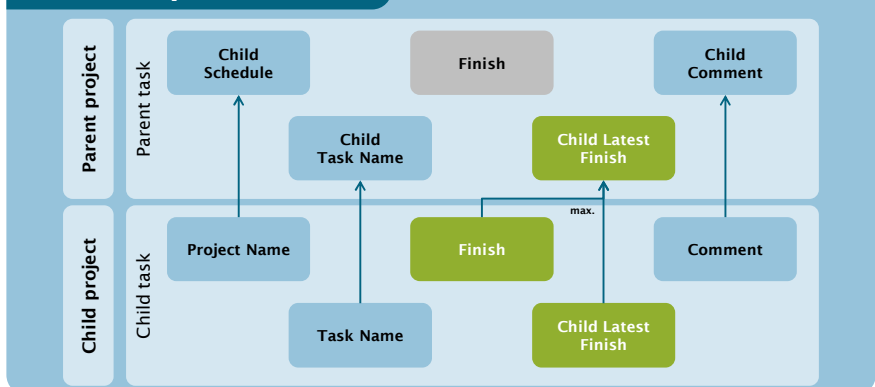
- Planning process
  - Setup a program structure
  - Setup the projects and assign them to the program
  - Define tasks and link those tasks
  - Push-down information like “Deadline”, “Finish dates”, or “Task Comments”
  - Rollup latest finish dates of an entire tree of linked tasks
  - Use soft links to show late tasks and moving dates
- Characteristics
  - Rollout one field into the entire program
  - Aggregate ‘finish’ dates of all linked tasks to the highest level



### Top-down data flow



### Bottom-up data flow

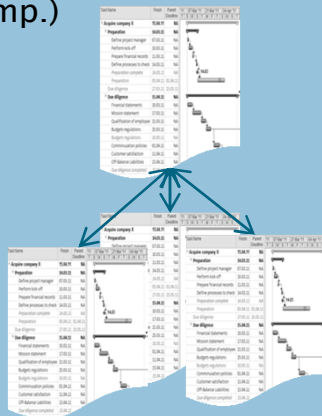


# Delegate tasks of a 'master plan' to departments for detailed planning – control budgets and timeline

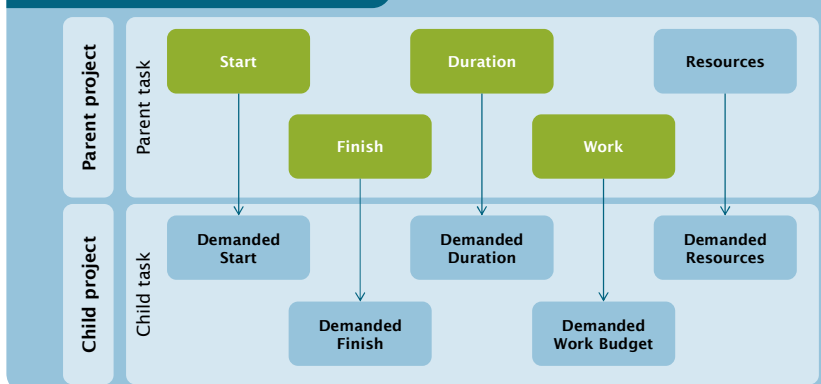
## Use case 2: Engineering program

### Functional setup

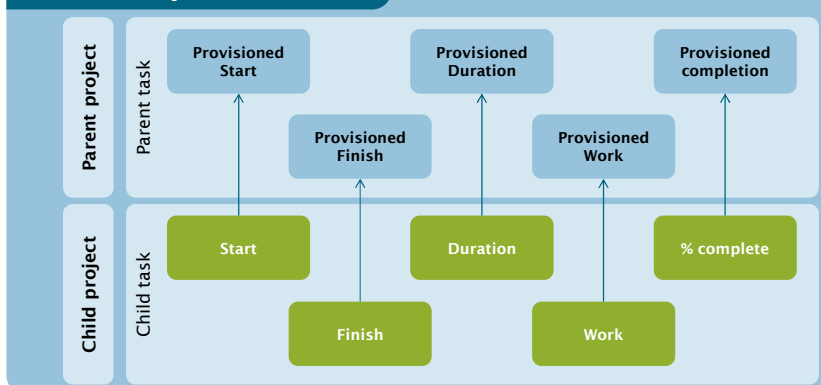
- Planning process
  - Program manager plans a new project with generic resources (on department level), i.e. assigns tasks to departments
  - Department head imports all tasks assigned to generic resources of own department
  - Department head details imported tasks into sub-tasks and assigns resources
  - Program manager controls progress (work, finish, %comp.)
- Characteristics
  - Delegate a single task
  - Detail task in 'sub project'
  - Write back progress into the 'master' project



### Top-down data flow



### Bottom-up data flow



# CS PME extends the standard features of Microsoft Project Server with essentials for program management

## Added value of CS PME – compared to Microsoft Project

	Microsoft Project Server		CS PME	
Links over projects' boundaries	✓	Standard features (predecessors and master project plans)	✓	CS PME link technology
Hard and soft links	(✓)	Hard links: predecessors Soft links: deliverables	✓	Configurable link types
Security	(✓)	Standard security concept: only proj. with read access linkable	✓	Dedicated tasks may be published
Filter for tasks		All available tasks of projects may be linked, no control	✓	Filters reduce available tasks (administrative and manual)
Import of new tasks		No notifications and import functions of new tasks	✓	Import tasks and get regularly updates
Server sided calculations		External projects need to be opened to update links	✓	Calculations on server increase efficiency of project manager
Extended data flows		Only dates may are transferred	✓	Design multiple data flows with each individual fields
Locked fields		All fields are editable	✓	Protect dedicated fields from changes by users
Designed for large environments		Working fine in small env. with few tasks to be linked	✓	Productive in environments with more than 400 projects

Use CS PME for  
cross-project links!

Increase **reliability** of  
information  
within your programs!



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