ActionProgram Manager™
User Guide
Version 6.3

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About ActionProgram Manager™

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

Using the AR System interface, terminology, and processes, APM provides a centralized location for implementing the best practices of project management. APM 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 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.

ActionProgram Manager includes a critical-path-method date calculator, Gantt charts, resource management charts, and reports that are extremely useful in managing your projects and resources. ActionProgram Manager's 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.

ActionProgram Manager reduces implementation time and the risk associated with developing customized applications. APM 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.

ActionProgram Manager 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 ActionPortfolio Manager (PPM), it forms our IT Governance Suite.

- When combined with PPM and PRI's Service Manager, it forms our complete Service Request Application.

- APM can be integrated with your existing AR System-based applications, including Change Management and Asset Management. ActionProgram Manager is the only program management system that integrates with AR System-based asset management application.

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 statuses the task, eventually closes the task, and goes on to the next one. In designing ActionProgram Manager, we wanted to use this basic structure, but make it applicable to projects and project tasks, and make it very easy to use by everyone.

For example, we know that the largest number of projects in an IT organization are managed by team leaders, not project managers, and as a result, we worked diligently to make the application straightforward for team leaders to use.

Rapid Implementation – Leverage Your Remedy Investment and Reduce Risk

Created to work on AR System, APM leverages that user interface to provide a familiar application environment and investment in training, operations, and employee experience. Installing ActionProgram Manager on your existing AR System environment can be done quickly and straightforwardly. Often, integrating APM with your existing notification system and customizing it to fit with your specific requirements can be accomplished in a week or two.
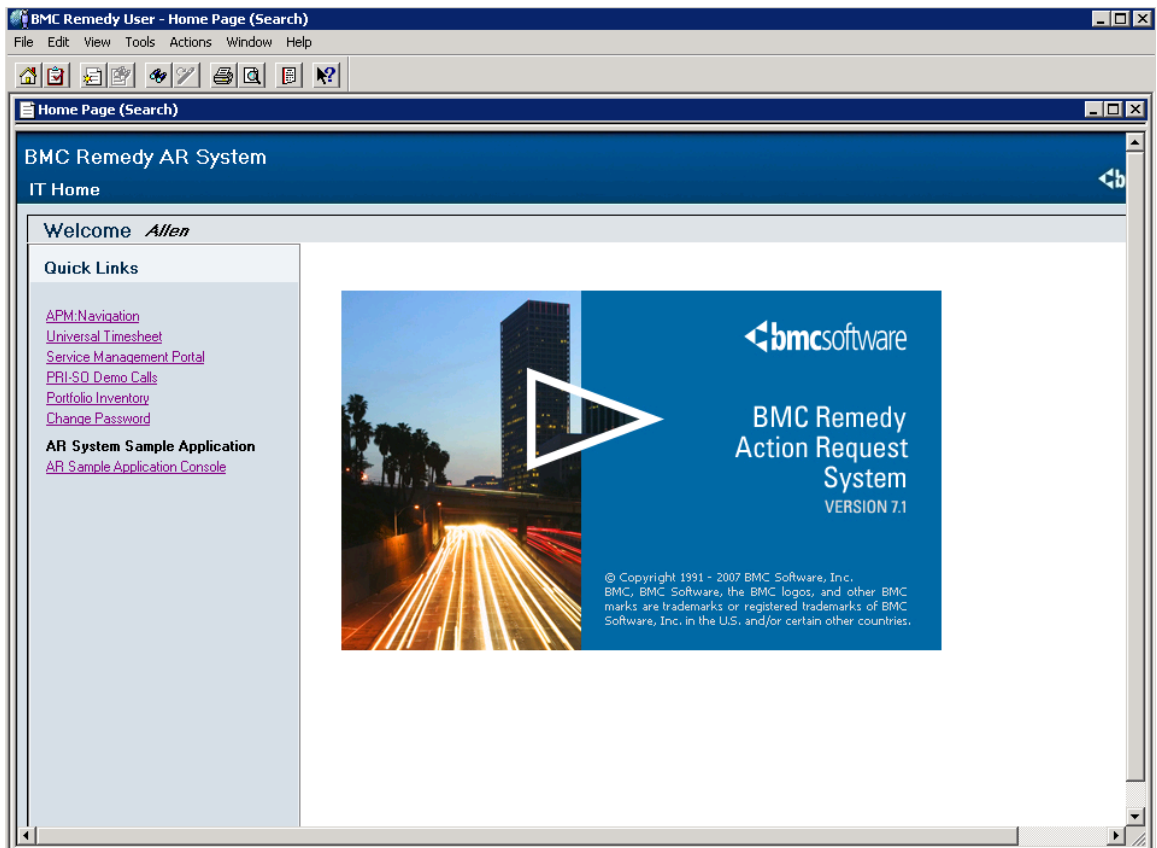
Figure 1 - BMC Remedy AR System - Home Page

Audience

This guide is written for users of the Project Remedies Incorporated (PRI) ActionProgram Manager™ application, which runs on the BMC Remedy Action Request (AR) System™ platform. This guide details how to use APM 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.

ActionPortfolio Manager (PPM) – Optional Add-on

A Project Remedies optional add-on, ActionPortfolio Manager (PPM), can be purchased to work with APM. PPM is used for planning and managing proposed projects of all sizes. Proposed projects can be defined and approved in PPM, then executed as project plans that may be worked using APM.

PPM includes the ability to forecast resources at the skills level and helps management answer questions such as "Do we have enough resources to do what we want to do?" and "When will we have skills shortages and skills surpluses?"

Separate documentation is provided with PPM. This user guide documents how to use APM as a stand-alone application; the places where APM and PPM meet are clearly indicated.

Installation and Implementation

The steps below represent a high-level outline of a typical APM/PPM installation and implementation, and are provided as a working example. Please keep in mind that each environment and situation is different. However, whether you hire PRI to install the software or if you decide to install it in-house, many of the following steps will need to be completed:

I. Software Installation

A. Install the software on test/development server.

B. Complete the validation test plan.

C. Train the AR System administrator.

D. Train the trainer.

II. Requirements Review

A. Brief requirements review.

1) Review and finalize proposed project/active project life cycle.

2) Identify any application gaps.

3) Customize applications as necessary.

B. Work with IT Management.

1) Define menu item selections (PPM)

2) Define approval processes (APM).

3) Define skills, locations, organizations, resources (people), resource rates.
(Once these have been defined in APM they are available in PPM).

4) Define project templates (APM).

5) Define notification and escalation rules (APM).

6) Define security/permissions (APM).

7) Define default work schedule and holidays (APM).

8) Define cost accounts (APM).

9) Define notification interfaces (APM).

10) Define the number of people by skill, location and organization (PPM).

11) Define initial dashboards for key users (PPM).

III. Configure ActionPortfolio Manager/ActionProgram Manager on Remedy Test Environment

A. Load data into APM.

B. Test email and other notification interface(s).

C. System test.

D. User training.

IV. End User Testing/Move to Remedy Production Server.

A. User acceptance testing

B. Modify as necessary.

C. Client acceptance.

D. Move to production server.

E. Test on production server.

F. Additional user training as necessary.

G. Create additional reports as necessary.

APM Third-Party Software Integration

APM may be integrated with third-party software such as Paging and Accounting System, to leverage tools and processes already in use. APM 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.

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.

- 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.

- 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."

Overview of This Guide

This user guide is divided into the following parts:

Preface   Provides an introduction to APM.

ActionProgram Manager Features
> Describes APM's main features.

Part I: Overview
> Provides an overview of project planning and management standards used in APM, and also describes basic APM functionality such as forms, charts, and navigation.

Part II: Adding Resources to APM
> Describes how to add enterprise skills, locations, and organizations, resources (people), and rates.

Part III: Planning a Project   Describes how to create a project plan.

Part IV: Approving a Project   Details how a project plan is approved.

Part V: Working a Project
> Details how tasks are working, provides a place for revisions, and notifies a project manager of schedule changes.

Part VI: Completing a Project Describes how to close a project.

Part VII: Reviewing a Project Describes how to review a project with charts, reports, and query lists.

Part VIII: Managing Resources
> Describes how to effectively manage your skill resources.

Appendix A: Charts & Reports
> Provides examples of APM charts and reports.

Appendix B: APM Forms Reference
> Provides detailed technical information about the main APM forms.

Appendix C: Critical Path Method Scheduling – An Overview
> Provides detailed examples to explain this essential element of project scheduling.

Appendix D: Creating a Multi-Level Project Plan Without Using a Template
> This detailed tutorial describes how to create a project plan with multiple levels of tasks and sub-tasks, without using a template.

Appendix E: Assigning Resources to Tasks

This detailed tutorial describes how to assign resources, i.e., people, to a task.

Appendix F: Service and Support

 Contact information for Project Remedies technical support.

Using This Guide

The following conventions are used in this guide:

Bold	Identifies a new or important term. Example: **Schedule Orientation**
	Bold is also used to identify required fields in APM forms. Example: Select Pending Approval in the **Status** field.
Italics	Data values included with ActionProgram Manager. 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.

ActionProgram Manager Features

A high-level overview of APM's features and functionality includes the following:

- **Turnkey AR System Application:** Created in AR System, APM leverages the user interface to provide a familiar application environment and investment in training, operations, and employee experience.

- **Uses Existing AR System Licenses:** No additional AR System licenses are required to install and begin using ActionProgram Manager: increasing the return on your original BMC Remedy AR System investment.

- **AR System Integration:** APM 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 used to track service level agreements against projects and tasks managed and tracked in ActionProgram Manager.

- **Microsoft Project Imports:** APM includes the ability to import projects from Microsoft Project systems. (See APM_MSProject_Features.doc for details.)

- **Optional Link to ActionPortfolio Manager:** An optional add-on is available to connect APM with PRI's ActionPortfolio Manager application (PPM).

  Proposed projects can be defined and approved in PPM, then executed as a project plan that may be worked on using APM.

  ActionPortfolio Manager includes the ability to forecast resources at the skills level, answering the following questions:

  - Do we have enough resources to do what we want to do?

  - When will we have skills shortages and skills surpluses?

ActionPortfolio Manager includes a robust and very easy-to-use charting and dashboard capability.

- **Third Party Integration (not included):** APM may be integrated with third-party software such as Paging and Accounting System to leverage tools and processes already in use.

- **Multi-User Network Environment:** APM 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.

- **Role-Based Features:** Screen views will contain different fields of information based on the role of the logged in user (engineers, management, etc). Available reports will also be different based on the role of the logged in user.

- **Risk and Issue Management:** APM provides risk management functionality by allowing project owners to associate risks and issues on both projects and/or tasks.

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

- **Inter-Project Dependencies:** Inter-project dependency relationships can also be defined.

- **Dependency Relationships:** Dependency relationships can be defined between tasks and milestones to ensure that a project is implemented on the right schedule and in the right sequence.

- **User-Defined Approval Processes:** APM provides a mechanism to secure alignment with your business goals and priorities by embedding user-defined approval processes into each project.

- **Formal Project Approval Process:** APM separates the planning and working phases of a project with a formalized project approval process. Project approval is controlled through the Approval button 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.

- **Templates:** One of the most important features of APM is the introduction of templates to promote quick project starts and best practices in project management.

  A template is a series of tasks and the relationships between them. Several templates are included with each installation, as well as the ability to define your own custom templates. Breaking down a project into milestones, tasks, and sub-tasks can be a challenge. The APM templates will let you focus your attention on your project, instead of spending precious time and energy reinventing the project management methodology wheel each time.

- **Auto-Calculates the Project Schedule:** APM 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 start or finish date by selecting the schedule orientation. Specific dates and duration may be manually entered for a task. If unknown, APM will automatically calculate the schedule using default values that can later be modified if needed. Using APM, a project plan could even be created without ever entering a date or duration. Projects can be planned in time units of hours or days.

- **Time & Expense Planning and Tracking:** APM enables the planning and tracking of the hours required for 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 and the entire project.

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

- **Baseline Plan Tracking:** 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. 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 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 can be specified, increasing the accuracy of the project schedule and calendar.

- **Automated Notifications and Schedule Alerts:** APM 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-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.

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

- **Pools & Programs:** APM provides a mechanism to pool projects together for reporting purposes. While a project can only be in one program, it can be in more than one pool.

- **Re-Planning a Project In Progress:** Changing project requirements and schedules are accommodated through the re-planning capability in APM. A project manager can easily modify, add, or delete the tasks and milestones in a project to accurately reflect the changing nature of the project.

- **Roll-Up of Task and Project Details:** A chronological log of events and notes is maintained for individual tasks and the entire project through APM's 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.

- **Pre-Defined Reports and Charts:** APM now includes expanded and enhanced reports. You have access to more than 20 pre-defined reports, and drill-down Gantt charts.

  Reports provide critical project and task information in pre-defined formats, which can later be sorted 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.

Part I: Overview

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

- Project Life Cycle

- Project Elements

- Project Roles

- Project Schedule

- Creating Project Plans with ActionPortfolio Manager (PPM)

- ActionProgram Manager Forms

- Charts & Reports

- Navigation

- Buttons & Other Conventions

Project Life Cycle

ActionProgram Manager provides a flexible environment for planning and managing planned and active projects. Like PPM, 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.

Proposed and Active Projects

Projects in the PRI project management framework are divided into two basic groups: *Proposed* and *Active*. A **Proposed Project** is one that has not yet started. An **Active Project** is one that has started.

If your installation includes ActionProgram Manager (APM) only, then APM is used to manage the entire project life cycle.

If your installation includes both ActionProgram Manager (APM) and ActionPortfolio Manager (PPM), then PPM is used to manage the proposed project life cycle, and APM is used to manage the detailed planning and the active project life cycles.

The following diagram illustrates the life cycle phases in ActionPortfolio Manager and ActionProgram Manager, clearly indicating the split between proposed (blue background) and active (green background) projects.
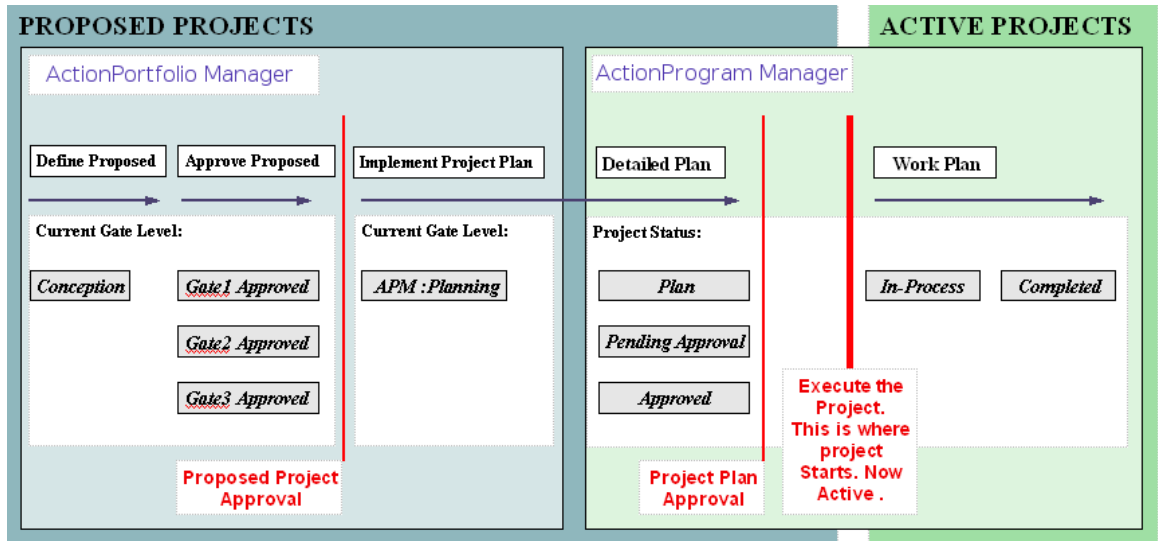
Figure 2 - Project Life Cycle Phases & Project Status Gates

The following list discusses the Life Cycle Phases & Project Status Gates diagram:

- The main life cycle phases (*Define Proposed*, *Approve Proposed*, *Implement Project Plan*, *Detailed Plan*, and *Work Plan*) are shown with the corresponding **Current Gate Level** field and **Project Status** field values listed below them.

- The gate level values in PPM are system-generated and read-only. These values can be included when selecting data for charts, so management can sort all projects within the system by life cycle phases.

- The thin, vertical, red lines indicate the approval process barriers. Both the proposed project and the project plan must be approved before the project can move past these barriers to the next phase.

- The thick, vertical red line between the ActionProgram Manager *Detailed Plan* and *Work Plan* phases indicates the point where an *Approved* project plan is executed into the active, working phase.

Used together, PPM and APM give management the ability to plan, control, and monitor projects from start to finish, throughout their entire life cycle. The following illustration depicts the same project life cycle as above, divided between PPM and APM. It also includes some of the detailed steps within each project phase.
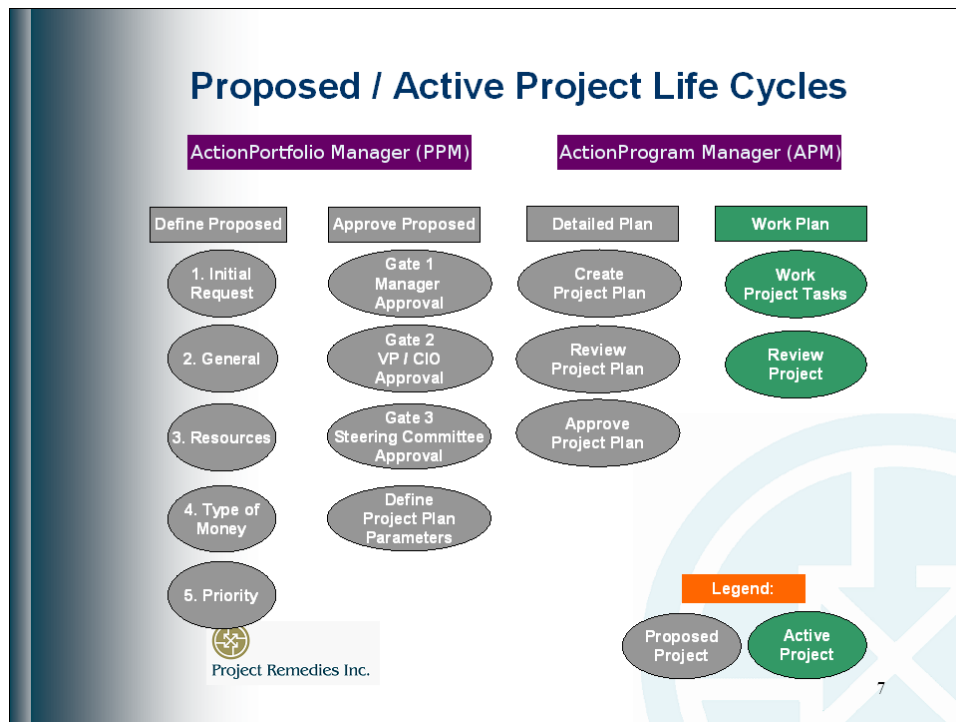
Figure 3 - Proposed and Active Project Life Cycles in PPM and APM

All projects created in ActionProgram Manager automatically generate a record for that project in PPM (if installed), populated with the current project data.

All proposed projects created in PPM can also be implemented directly into ActionProgram Manager, with a **Project Status** of *Plan*.

APM Project Phases

ActionProgram Manager provides support for projects from the detailed plan through the work plan phases as illustrated in Figure 3 above. In APM, projects are created, defined, approved, worked, and reviewed. To support this workflow, APM is organized into 3 basic project phases: planning, working, and review. Between the planning phase and the working phase of every project is a user-defined approval process.
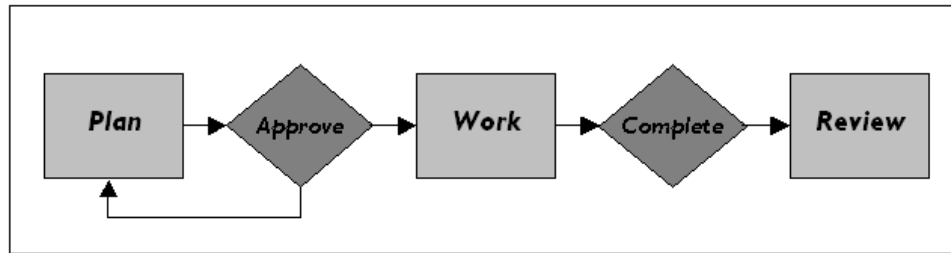
Figure 4 - APM Project Phases

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.

1. **Create a New Project Plan**.

- 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.

- Specify risk level.

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.

- Group projects together into pools or programs for reporting and tracking.

- Determine the Critical Path.

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. In APM, a formal process is used to transition a project from the planning to the working phase. Only a user with permission can approve a project.

When you execute the plan into the approval process, the approver(s) are notified. (Approvers are notified the same way people are notified with your existing AR System applications.) Your approval process can be as simple or complex as you would like.

The approval phase includes the following basic steps:

1. Review the Project Plan.

2. Re-Plan if Needed.

3. Approve the Project Plan.

   - 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. If approved, the person in the project manager role is notified.

4. 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; this begins the working.

   - The status of the original project record changes from *Approved* to *In Process*.

   - The Baseline plan is created. The Baseline plan plays an important role in managing and measuring a project's success. TheBaseline plan *cannot* be modified or deleted. Tasks and milestones may be added to a project after it starts, but they will not appear in the Baseline plan.

- The project Base Start Date, Base Finish Date, Base Duration, Labor Hrs., and Cost are populated with the project plan information and cannot be changed.

- The moment is recorded in the Actual Start Date field as the project start.

- The people responsible for the first task(s) are notified. If they are a manager who has to assign the task to someone, they do that, and the person or people are notified. More than one person can be assigned to work each task. If people had already been assigned to the task, these people are automatically notified that they can begin working on the task.

The Working Phase

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

1. **Begin Working Tasks.**

- Once a project starts, work can begin on the tasks of the project based upon the schedule. As with the planning phase, ActionProgram Manager capitalizes on the multi-user network environment, allowing anyone working on a project to log time against it.

- 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*. That moment is logged as the start time for the task, and the APM:Tasks form > Work Time tab becomes available.

4. **The Project Completion Milestone.**

- When the last project task is finished, the project status automatically changes to *Completed* and the Review phase begins.

- At this point, ActionProgram Manager automatically changes the original project record status from *In Process* to *Completed*.

- All work ends on the project and the important process of reviewing the project's Baseline plan with 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 Review Phase

An important aspect of effective project management is to clearly understand the differences between the project as planned and the project as implemented. ActionProgram Manager 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

Project Elements

This section describes the major elements that are part of a project. These elements are:

- Task Work Breakdown Structure (WBS)

- Tasks

- Milestones

- Dependency Relationships

Task Work Breakdown Structure (WBS)

ActionProgram Manager 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, charted on Gantts, and processed. 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.

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 of the WBS is 1, and identifies all tasks, summary tasks, and milestones, which are directly under the original project record. The next level is 1.1, then 1.2, then 1.3, etc.

An APM project can have an unlimited number of WBS levels. The sample project in Figure 5 shows how a project WBS might appear.

Figure 5 - Work Breakdown Structure

Tasks

There are two types of tasks in ActionProgram Manager:

- **Task** – 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 1) are directly under the project record. Tasks at any other level are sub-tasks. APM supports as many levels of sub-tasks as you need.

- **Summary Task** – Sometimes an activity in a project is comprised of more than one task. 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 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 WBS of the task as well.

ActionProgram Manger allows an unlimited number of tasks, summary tasks, and milestones to be added to a project using the APM:Tasks form (Figure 6). They can be stand-alone in the project or layered to form multiple levels of sub-tasks and sub-milestones, contained by a summary task. Four different types of dependency relationships can be created – Finish:Start, Start:Start, Start:Finish,

and Finish:Finish. Both positive and negative delays can be defined between the dependencies.

Figure 6 - APM:Tasks Form

Groups and individual users are assigned responsibility for accomplishing tasks in the project. APM allows user assignments made in the planning phase to be re-assigned by group managers during the working phase to accommodate schedule and availability.

ActionProgram Manager automatically calculates project schedules. The project schedule orientation, task dependencies, and duration enable APM 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 flags the task if it is on the critical path of the project. Start and finish dates or the duration for a task can be specified. If no entry is made, APM will automatically enter defaults that can be modified later in the planning process.

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

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, both methods can be used. When a person is assigned to a task, those hours can be seen on the Resource Chart.

The more information you give ActionProgram Manager about a task, the better the cost information stored in the task. At the lowest task level, ActionProgram Manager 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 is the only PM system that integrates with an asset management system.

In ActionProgram Manager, risks and issues can be tracked at the project level or at any task level. 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* (Figure 4). 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.
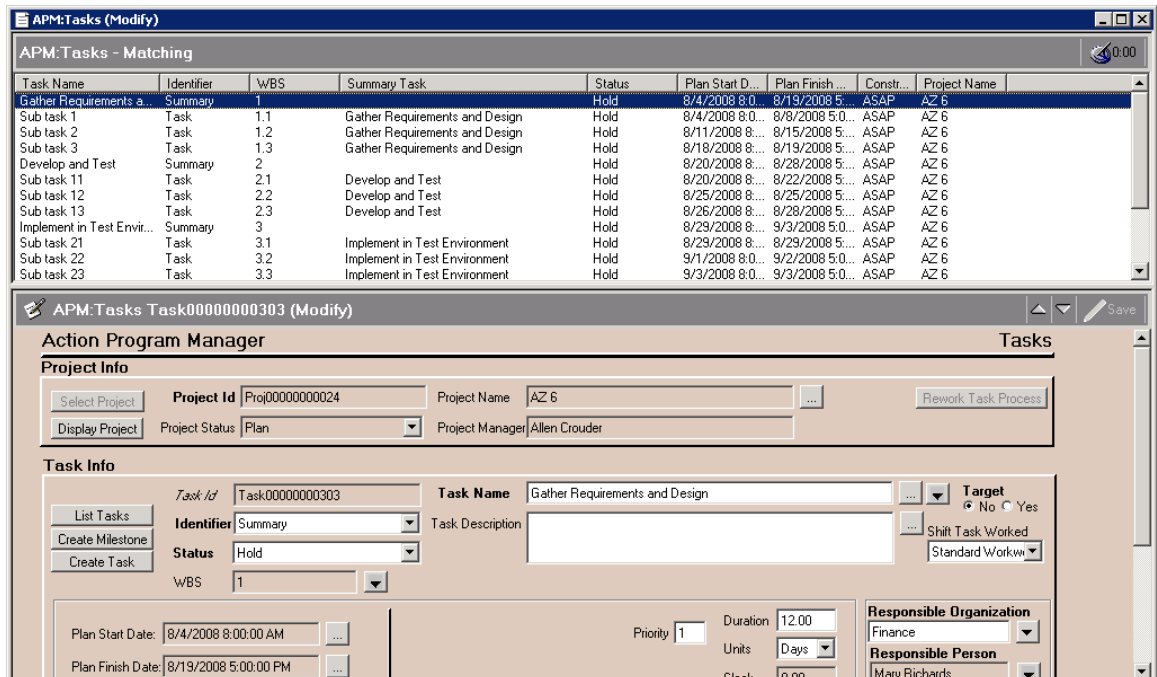
Figure 7 - Task Status

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. In Figure 5, 'Technical Review & Sign Off' is a milestone.

Dependency Relationships

The sequence in which tasks occur in a project is an important element of creating a successful project plan. Establishing this *sequence* is known as defining a dependency relationship between tasks. A dependency relationship has two tasks:

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

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

In ActionProgram Manager, a project can have an unlimited number of dependency relationships between tasks and milestones. If conflicting dependency relationships are created, APM will generate an error message so that it can be corrected in the project plan.

There are four types of dependency relationships:

- **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 cannot finish until 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 relationship, in effect placing a time gap or overlap between the two tasks. Delays can be either positive or negative. For example, Task A and Task B have a Finish:Start dependency with a 2-day delay. This means Task B is scheduled to begin working 2 days after Task A finishes. If the delay was –2 days, then Task B is scheduled to begin working 2 days before Task A is scheduled to finish.

Inter-Project Dependencies

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

- 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

Templates

Templates promote quick project plan development and best practices in project management. A **template** is a series of tasks and the relationships between them. Templates are used during the planning phase.

There are two kinds of templates: *Task* and *Approval*. **Task templates** create the task structure for the project, while **Approval templates** create the approval process. For details on constructing Approval templates see the 'APM Approval Process userclass.ppt' document.

Templates are defined by APM users who have permission to do so. Several task and approval templates are included with each installation.

Task Templates break down a project into milestones, tasks, and sub-tasks and their dependencies on each other and it can be a challenge. The APM task templates will let you focus your attention on your project, instead of spending precious time and energy reinventing the project management wheel on every project. 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 will surely reassign the task to the appropriate user. For details in creating templates see the 'APM:AdminNotes' document. In addition see Appendix C in the file 'CPM & Other Considerations'.

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

AR System Implementation
Development And Testing
Move 6 or more people
Requirements Analysis Design
SingleTask
Standard Template
Telecom Project Template (Mod)
Telecom Project Template(Mod2)
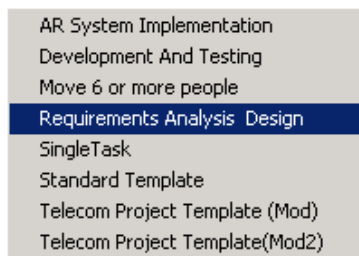
Figure 8 - Use a Template Options

Project Notes & Comments

During the working phase, important notes and comments can be chronicled in the project. The Project Details and Task Details fields serve as a chronological notepad for the project (Figure 9). Entries made in the Task Detail field are automatically rolled up through higher 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.
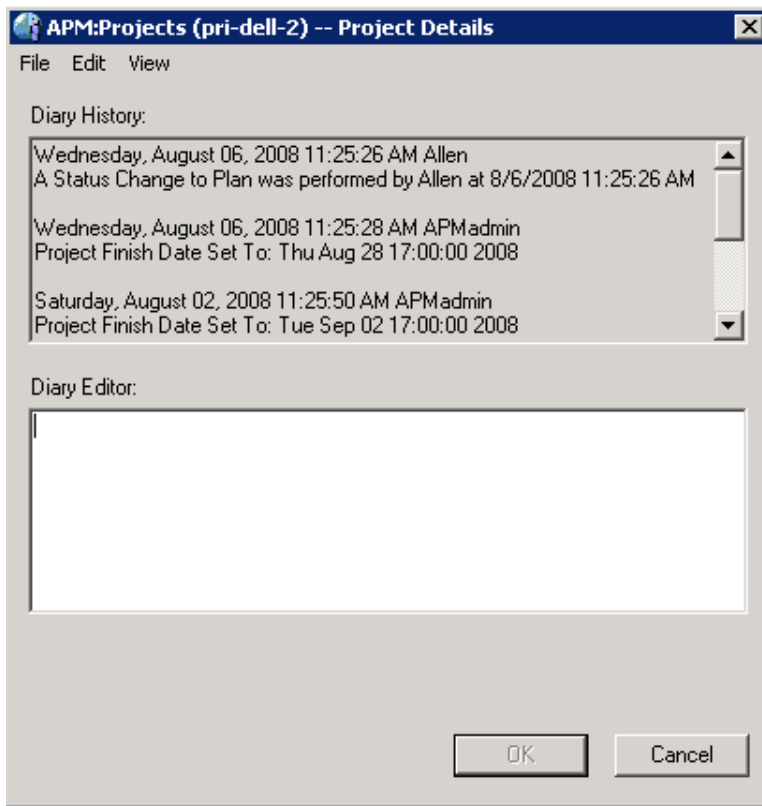
Figure 9 - APM:Projects Form> Project Details field Diary

Although a project plan is approved, the project does not actually start until the project manager clicks on the Execute Project button on the APM:Projects form. Then, the first or earliest task(s) of the project changes status from *Hold* to *Assigned*.

To maintain accurate tracking records, ActionProgram Manager records the project's actual start date when the project starts. It records the actual finish date when the last task or milestone changes to a status of *Completed*.

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.

The project roles in ActionProgram Manager are:

- Project Sponsor/Stake Holder

- Project Manager

- Project Approver(s)

- Task Responsible Organization

- Task Responsible Party

- Assigned Worker(s)

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 application.

In this role, the Project Manager controls the original project record. He/she creates and defines project elements 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 provides timely information about a project's progress through automated notifications and alerts, and detailed reports and charts. Once a project is approved, only the 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. For more information regarding this role (including changing project manager on an existing project) see Appendix F of the file 'CPM & Other Considerations'.

Project Approver(s)

Project approval is an important milestone in APM workflow. In the application, approval is the transition from the planning to working phase, but in a business organization it is also a formal commitment of resources. ActionProgram Manager manages this milestone through special permission assigned via the approval button. The approval is logged in the Project Details Field on the original project record

Task Responsible Organization

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 planning 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, assigned people to work the tasks.

Notifications and alerts associated with the task record are issued to the Task Responsible Organization 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 accomplishing the task work on schedule and for maintaining accurate information in the task record.

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

Each task must have a Task Responsible Party. If one is not specified, APM automatically enters the Task Responsible Organization manager as the Task Responsible Party for the task.

Assigned Worker

An Assigned Worker is someone that works on a task but is not specifically assigned responsibility for its successful completion. To enter work time against a task, a worker must be a member of the Responsible Organization for that task.

Project Schedule

ActionProgram Manager provides the schedule information necessary to successfully create and manage a project plan, including:

- Project Schedule

- Calculated Dates

- Schedule Orientation

- Slack

- Critical Path

For a detailed discussion of how APM manages project scheduling, please see Appendix C: Critical Path Method Scheduling – An Overview.

Project Schedule

ActionProgram Manager uses three different versions of the project schedule over the course of a project. Each represents a different perspective of the same project plan and it is important to understand the differences. These schedules are:

- **Plan Schedule** – This schedule is created during the planning phase and implemented during the working phase of a project. The Plan Schedule is used to trigger task work, status changes, notifications and alerts. Also, the schedule can be "re-planned" during both the planning and working phases.

- **Baseline Schedule** – The Baseline Schedule is created at the time a project is approved. 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. These dates are captured once, as they occur, and *cannot* be modified.

Calculated Dates

ActionProgram Manager 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, level, 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.

- **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.

ActionProgram Manager also tracks the Baseline Start and Finish dates as well as the Actual Start and Finish dates.

Schedule Orientation

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

- **Project Start Date** – The Project Start Date becomes the anchor date for the project and all elements of a project are scheduled to start as early as possible. If selected as the orientation, the Plan Start and Finish Dates equal the Early Start and Finish Dates.

- **Project Finish Date** – The Project Finish Date becomes the anchor for a project and all elements of a project are scheduled to finish as late as possible. If selected as the orientation, the Plan Start and Finish Dates equal the Late Start and Finish Dates.

- **Task Target Date** – When a task in the middle of the plan is the key task of the project, 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 used for planning scheduled and unscheduled asset outages.

The primary difference between these orientations is how the Plan Start, Plan Finish, and Task Target Dates are defined. See the following figures.

NOTE: Once a project plan is approved, the schedule orientation *cannot* be changed.

Figure 10 - Schedule Orientation: Project Start Date

Slack

Most tasks and summary tasks in a project will have a different set of dates calculated for the early and late date sets (*i.e.* the early and late start dates will be different).   The difference between these dates is called Slack. The slack represents the amount of 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 an impact on how Slack may be utilized in working a task. If a project's orientation is based on the start date, then a task is already scheduled to start as early as possible. Its Slack is the amount of time that the task can *slip* to start later than the plan date. Tasks, which are in a project oriented to the finish date, are already scheduled to finish as late as possible. For these tasks, Slack is the amount of time that it can start earlier than the plan date.

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

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

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

Task Dependencies

The schedule and critical path of a project can only be determined after the inter dependencies of tasks are known. See below under APM:Task Dependencies Form for more details. Tasks are linked together in relationships that determine their start and finish times.

Task Durations

The schedule and critical path of a project are also dependent upon the duration that each individual task is expected to take. See below under APM:Task Form for more details.

Task Constraints

The schedule and critical path of a project are also dependent upon the constraints that are associated with each task. See below under APM:Task Form for more details.

Inter-Project Dependencies

The schedule and critical path of a project may also dependent 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.

Interworkings of fields control the project schedule

There are several fields and configuration data items that are used in combination with the above noted project information. For a more detailed discussion of these relationships including several alternatives and warnings, please refer to the document 'CPM & Other Considerations'.

Project Plans Created With PPM

APM functionality has been enhanced with the optional ActionPortfolio Manager (PPM) system. PPM lets you create and modify proposed projects, and supports the processes and communication needed to move from proposed project to the project planning phase.
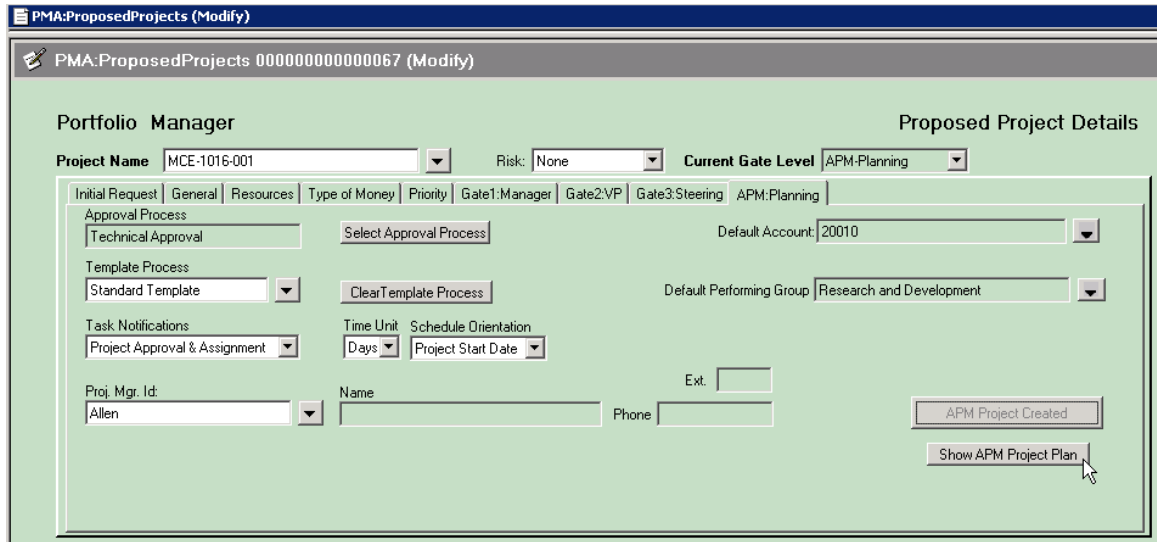
Figure 11 - Proposed Project Created in PPM implemented as Project Plan in APM
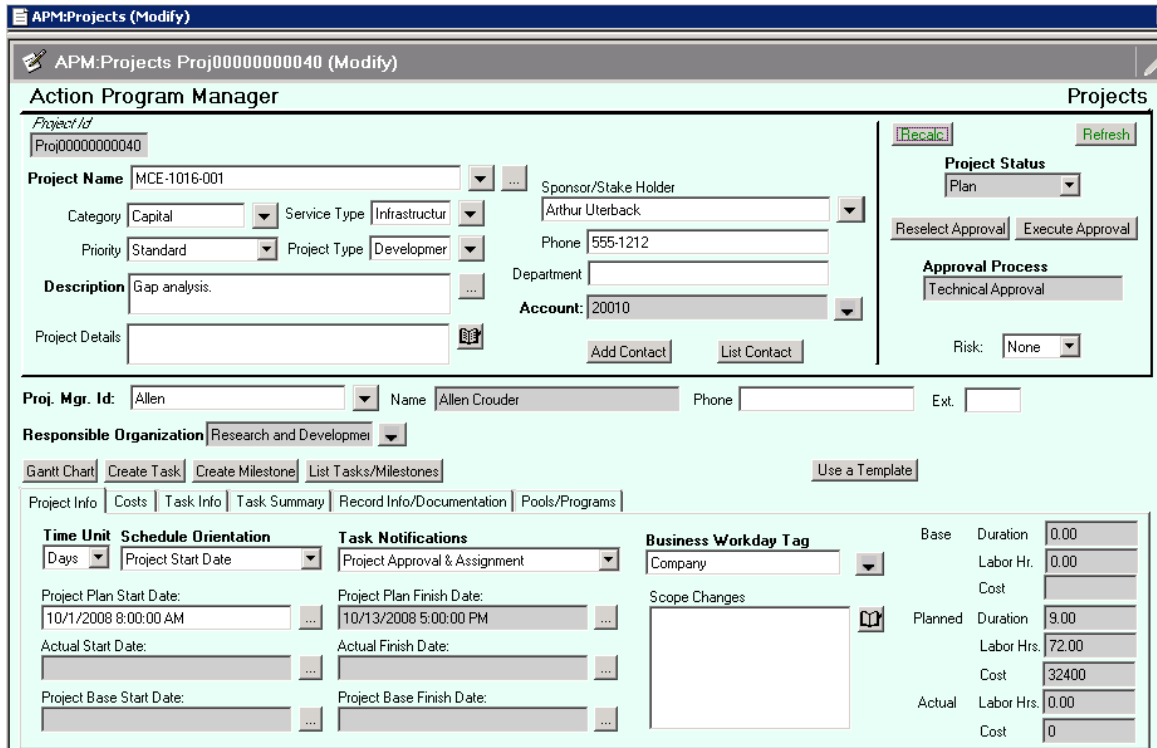
Figure 12 - PPM Proposed Project Implemented as APM Project Plan

If you have used PPM to create a proposed project, the final step is to implement the proposed project into a project plan. That step is the connection, or tie-in,

with APM. At that point you can open the APM:Projects form by clicking the Show APM Project Plan button (Figure 12), and continue on to the approval stage.

PPM is an optional add-on to ActionProgram Manager, and is not documented in this APM User Guide. Documentation is available with purchase.

ActionProgram Manager Navigation

This section describes how to navigate through ActionProgram Manager.

- Using the APM:Navigation Form

- Using Remedy Menus

Using the APM Navigation Form

If you are new to Remedy, or just wish to work from within PPM, the APM Navigation form provides a quick, convenient, color-coded method for opening the APM and PPM 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 project charts.NOTE: PRI's ActionPortfolio Manager (PPM) product also uses the APM Navigation form.

Open the APM Navigation form

1. On the AR System Home Page, click the APM:Navigation link.
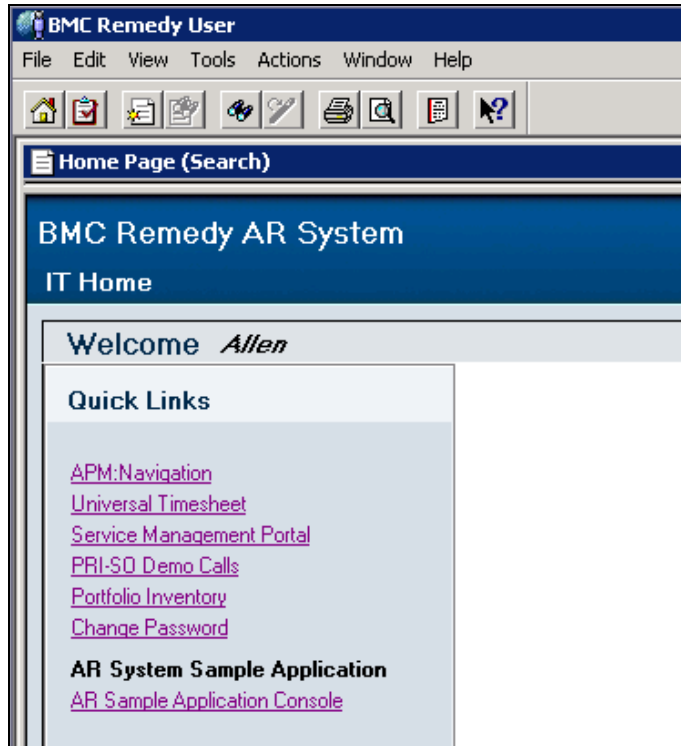
5.

Figure 13 - AR System Home Page

The APM Navigation form opens, displaying the Main Menu.

Figure 14 - APM Navigation form Main Menu

Use this navigation menu to access the main APM 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 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 functionality.

This method should only be used by those who have a thorough knowledge of the product.

Open an APM form using the AR System Object List:

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

The AR System Object List opens.
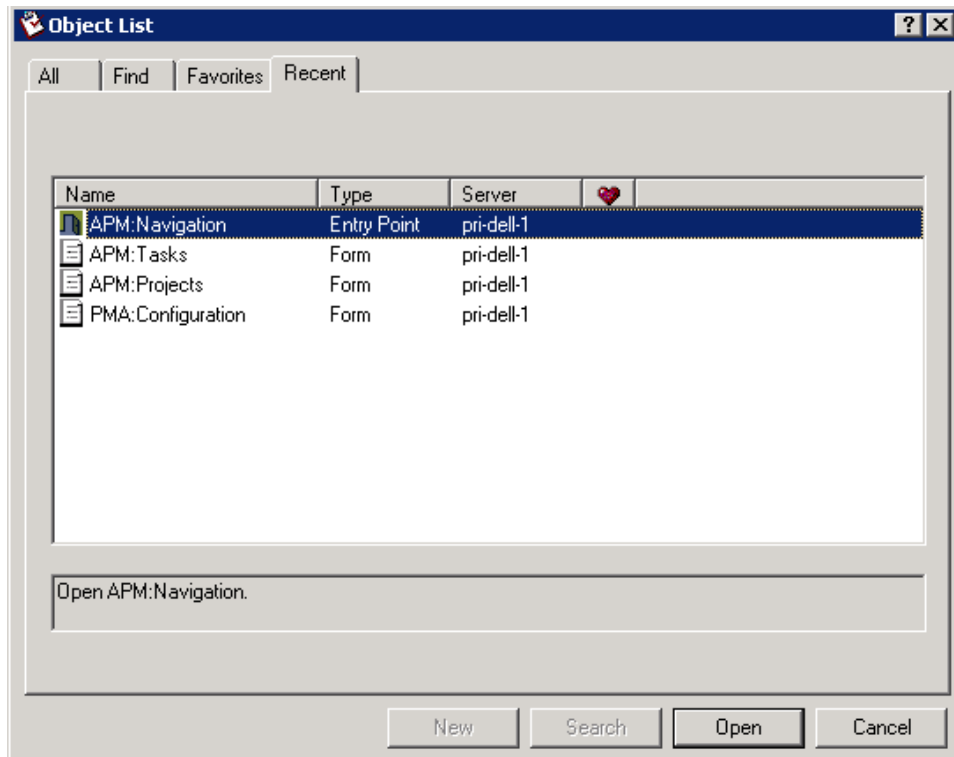
Figure 15 - AR System Object List, Recent

7. Select the APM form you wish to open. The All tab includes all forms, and the Recent tab includes forms you've opened recently for convenience.

8. Click the New or Search button.

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

ActionProgram Manager Forms

This section provides a brief overview of the following main ActionProgram Manager forms:

- APM:Projects Form

- APM:Tasks Form

- APM:Task Dependency Form

- APM:Approval Tasks Form

- APM:Time & Expense Tracking Form

This section also describes the following important background forms:

- APM:SkillSets Form

- APM:ResourceLocations Form

- APM:GroupAssociations Form

- APM:Resources Form

For more detailed information about these and other forms, please see Appendix B – APM Forms Reference. Forms are also described in the step-by-step instruction in the following sections.

APM:Projects Form

The APM:Projects form is the form in which the original project record is created, modified, managed, and tracked by the Project Manager.

Figure 16 - APM:Projects Form

APM:Tasks Form

The APM:Tasks form is the form in which the task, summary task, milestone and dependency relationships of a project are created, modified, managed and tracked by the Project Manager, Responsible Organization manager, and Assigned Worker during the working phase.

Figure 17 - APM:Tasks Form

APM:Task Dependency Form

The APM:Task Dependency form is where task dependencies are stored. Dependency relationships of a project are created, modified, managed and tracked in the APM:Tasks form by the Project Manager, Responsible Organization manager, and the Assigned Worker during the working phase.

Figure 18 - APM:Task Dependency Form

APM:Approval Tasks Form

The APM:Approval Tasks form is the form in which the approval process is reviewed and updated by the approval managers. Each manager reviews the planned project in turn, and may Approve, Reject, or Cancel it. After they select the Status to reflect their decision and click Save, their choice affects the next approval task down in the process cascade.

Figure 19 - APM:Approval Tasks Form

PRI:Time & Expense Tracking Form

The PRI: Time & Expense Tracking form provides an alternative method for entering work time against a task in any project. It is the location where all work time records are stored for tasks in a project in APM. Time is normally entered in the APM:Task form > Work Time tab as it is being worked, or in the Universal Timesheet.

Figure 20 - APM:Time & Expense Tracking Form - Timesheet

The Expense Tracking form provides an alternative method for entering expenses in any project. It is the location where all work expense records are stored for tasks in a project in APM. Expenses are normally entered in the APM:Task form > Work Time tab as it is being worked or in the Universal Timesheet.

Figure 21 - APM: Time & Expense Tracking Form - Expense Sheet

APM:SkillSets Form

The APM:SkillSets form is the form in which skills can be added to the enterprise that were not included in the out-of-box APM installation.

Figure 22 - APM:SkillSets Form

APM:ResourceLocations Form

The APM:ResourceLocations Form is the form in which enterprise locations are added and maintained.

Figure 23 - APM:ResourceLocations Form

APM:GroupAssociations Form

The APM:GroupAssociations form is the form in which the organizations (or "departments") are added and maintained.

Figure 24 - APM:GroupAssociations Form

APM:Resources Form

The APM:Resources Form is the form in which the individual resources – people – are added and maintained within APM.

Figure 25 - APM:Resources Form

APM Form Quick Lookup:

This section provides a quick lookup reference for the most common APM forms and for the APM:Navigation form options that open them. They are listed below in alphabetical order by form name. For more complete information about the APM forms please see Appendix B - APM Forms Reference.

APM FORM	TO OPEN
APM:Approval Tasks	APM:Navigation > Approve
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: > Query Active. The APM:Projects form opens in Search mode.
APM:Risk Management Inter-Project Dependency	APM:Tasks form > Dependency Tab > Create IPD (or Modify IPD to open existing inter-project dependency)
APM:Tasks	There are two main ways to open a task record: **A:** APM:Projects form > Task Info tab > Double click on a task to open it in the APM:Tasks form. **B:** APM:Projects form > List Tasks/Milestones button > Select *List Entire Project.*
APM:Task Dependency	APM:Tasks form > Dependency tab >List Dependencies Or click on List Dependencies on the Toolbar:
PRI:Approve Time & Expense	APM:Navigation > Time Entry > Approve T&E Tracking

APM FORM	TO OPEN
Time & Expense Tracking (timesheet)	APM:Navigation > Timesheet
Charts	APM:Navigation > Charts
Reports	APM:Navigation > Reports

Charts and Reports

ActionProgram Manager includes Gantt charts and pre-defined reports for planning, managing, and evaluating single and multiple projects. Pre-defined reports provide hard-copy detail set forth in the various task and milestone records.

Gantt Charts

ActionProgram Manager features integrated Gantt charting to provide a graphic presentation of the project as it is being planned (Figure 26) and worked. 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.

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.
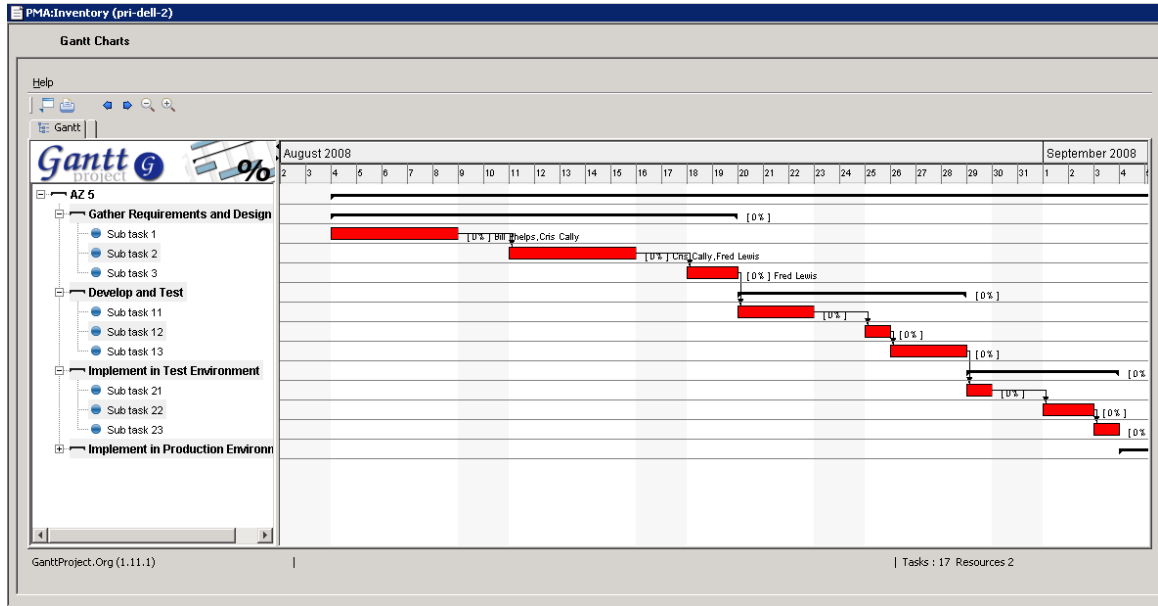
Figure 26 - Gantt Chart of a Project in Planning

Resource Charts

APM includes charts for viewing the status of project resources for ongoing visibility as a project is being worked.

Pre-defined Reports

The following reports are included with ActionProgram Manager. They are described in greater detail in Part VI: Reviewing a Project, and Appendix A: Charts & Reports.

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.

Close Out Time Report

Common APM Form Features

Most of the APM forms also 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 of the APM forms:

Selection List Down Arrow	Click the down arrow buttons to open a dropdown selection list, or open a separate Selection List window, presenting possible values for the field.
Display Field Contents	Fields that have a button with 3 dots to the right side of the field indicate a text entry field. You may enter as much information as you wish in these fields. 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.

To close an open window, click on the X in the upper right hand corner of the individual window, or click the Cancel button.

APM:Projects Form Toolbar
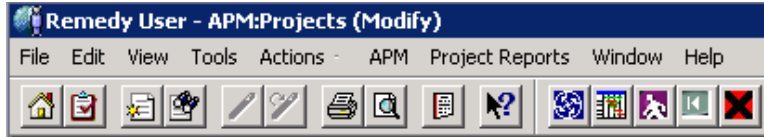
Figure 27 - AR System and APM Project Record Toolbar

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 Click this to change the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed. Re-click the What's This? button to toggle out of dynamic help mode.
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 Toolbar
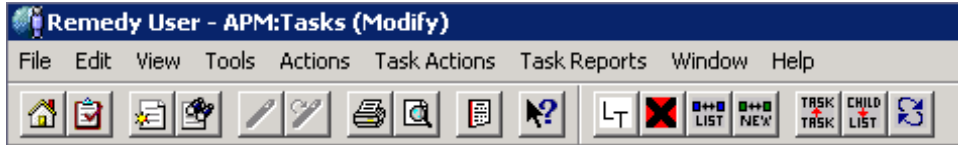
Figure 28 - AR System and APM Task Record Toolbar

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

Reports		Opens the APM:Projects Report Styles form.
What's This?		Click this to change the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed. Re-click the What's This? button to toggle out of dynamic help mode.
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 current task record displayed.
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.

Change Level

Use to create or remove a summary task relationship from the selected task.

Part II:
Adding Resources
to APM

Before you can begin creating new projects, you need to define your enterprise within APM. This includes adding resources such as skills, locations, and organizations, the people who will be working on projects, and the rates associated with each.

This section describes how to add resources to APM. Normally the AR System Administrator performs this task following APM installation, as part of the implementation phase. We include it here to help you understand how APM works within the enterprise. You may also need to know how to update resources to reflect changes in your environment, such as adding a new branch office or updating rates. This section includes the following topics:

- Adding Skills, Locations, and Organizations

- Adding a New Person to APM

Adding Skills, Locations, and Organizations

The enterprise resources of skills, locations, and organizations are available in the Selection Lists and are used to complete numerous fields in APM.

NOTE: The steps in this section describe how to use several forms that are not available directly from the APM:Navigation form. Instead, open them from the AR System Object list: select File > Open > Object List (or click Ctrl-O) to open the AR System Object list. Forms are listed in alphabetical order, and will open in New or Modify mode depending on which button you click after selecting the form

Add a Skill

A skill is basically a job title in APM. It includes the code that is used in the selection lists, a description, and an associated rate.

1. Select the APM:SkillSets form and click New. The APM:SkillSets form opens in New mode.

2. Complete the form to add a new skill.

Figure 29 - Adding a New Skill Set

- *Skill ID* is generated automatically when you save the skill.

- Enter a **Skill Code**. This is a unique abbreviation that will be used throughout APM.

- **Rate**. Enter the hourly rate associated with this skill. Do not use the dollar sign. Decimals are allowed. Rates may also be set for organizations and individual users. The skill rate is used while planning a project before individuals are assigned to specific tasks.

- The default **Status** is Active.

- In the **Description** field, enter the name of the skill.

- The **Effective From Date** will default to the current date. Select a different effective date from the calendar if needed.

- Leave the Effective To Date blank if you wish to make the skill available indefinitely. Enter a date if you wish to limit the availability of the skill to a specific time period.

3. When done, click Save. The form closes and the new skill is added to the skills selection list.
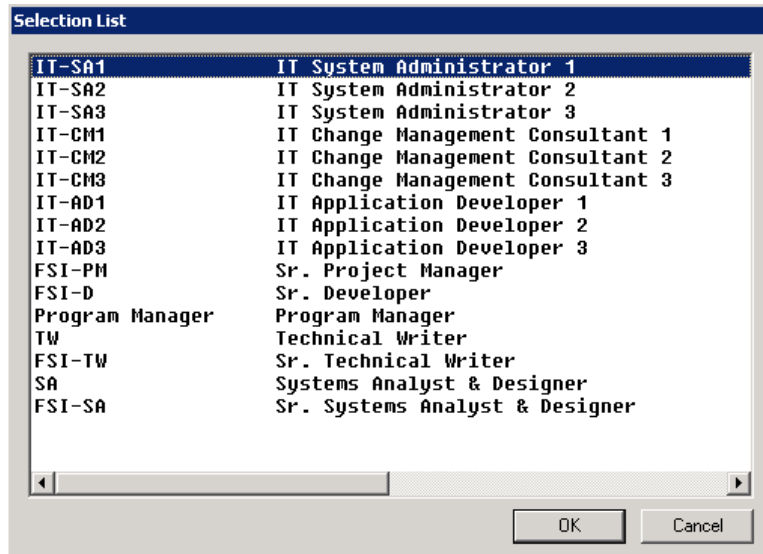
Figure 30 - New Skill Added to the Selection List

Add a Location

A location is a place where people work, such as an office, or some other physical place or facility within the enterprise.

1. Select the APM:ResourceLocations form and click New. The APM:ResourceLocations form opens in New mode.

2. Complete the form to add a new location.
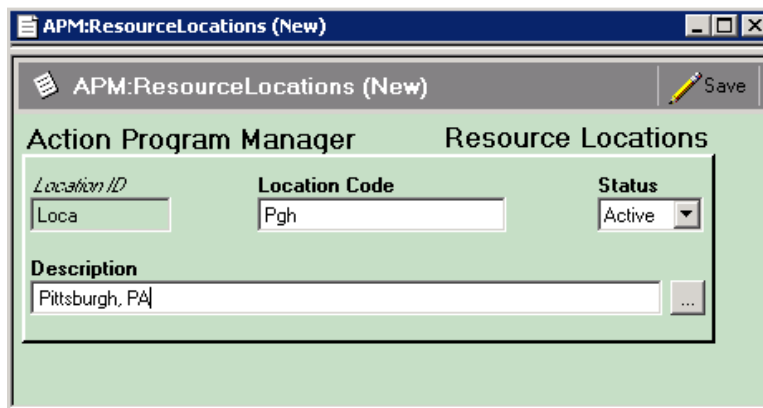
Figure 31 - Adding a New Location

- *Location ID* is generated automatically when you save the location.

- Enter a **Location Code**. This is a unique code that will be used throughout APM.

- The default **Status** is Active.

- Enter the full name of the location in the **Description** field.

3. When done, click Save. The new location is added to the locations selection list.
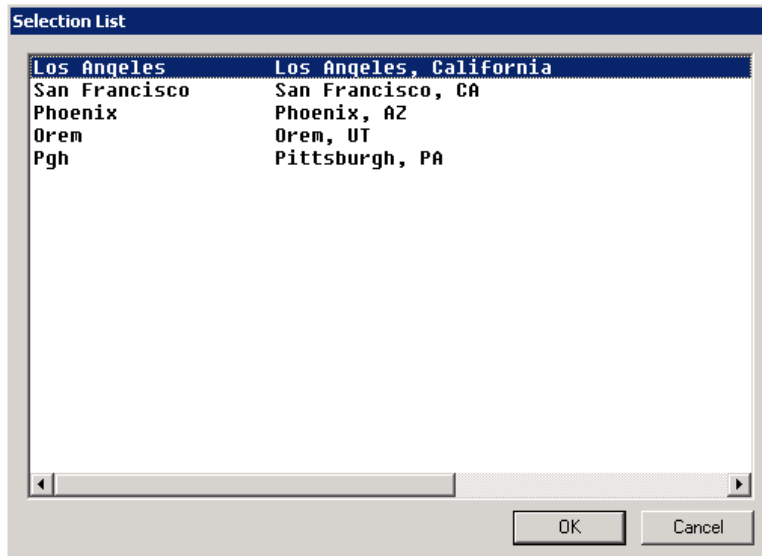
Figure 32 - New Location Added to the Selection List

Add an Organization

An organization in APM is essentially a department within the enterprise.

1. In the AR System window, select File > Open > Object List (or click Ctrl-O) to open the AR System Object list.

2. Select APM:GroupAssociations and click New. The APM:GroupAssociations form opens in New mode.

3. Complete the form to add a new organization.

Figure 33 - Adding a New Organization

- *Group Association ID* is generated automatically when you save the new organization.

- Enter a **Group Association Name**. This is a unique name that will be used throughout APM.

- Select a Location by clicking on the field's down arrow and selecting a value from the location selection list.

- Select a **Security Group**.

- The default **Status** is Active.

- Enter an Average Rate for the organization. Do not use the dollar sign. Decimals are allowed.

- The **Effective From Date** will default to the current date. Select a different effective date from the calendar if needed.

- Leave the Effective To Date blank if you wish to make the organization available indefinitely. Enter a date if you wish to limit the availability of the organization to a specific time period.

4. Add a manager and a supervisor.

NOTE: Before you can complete this step you must create the resources who are assigned to this new organization (i.e., group).

- Click the Set Manager and Set Supervisor buttons, and choose the people you need from the selection list. Their user information is added to the Manager and Supervisor tabs.

5. When done, click Save. The new organization is now ready for you to add people.

Updating Skills, Locations, and Organizations

If you need to make changes to the enterprise resources, open the forms described above, and locate the record you need to update.

- To edit the record, open the form, make the necessary changes, and click Save.

- To exclude the record from the selection lists, change the **Status** field to Inactive, and click Save to save your changes.

Adding a New Person to APM

In APM, resources are individual people. Once you have added skills, locations, and organizations you can add the resources - people - to APM. Each person is associated with a skill, location, and organization.

Adding people to APM is a two-step process:

- First, the person must be set up in the Remedy User form. This is an AR System Administrator function.

- Second, the person must be added to APM using the APM:Resources form.

Add the New Resource to the Remedy User Form

Complete this step if you can't locate the person in APM. The quickest way to find out is to open the APM:Resources form in Search mode, click Search, and review the results. If you don't see them, then complete the steps below:

1. In the AR System window, select File > Open > Object List (or click Ctrl-O) to open the AR System Object list.

2. Select the User form and click New. The Remedy AR System User form opens in New mode.

    Complete the required fields on this form to add a new user.

    - Enter the user's **Login Name**.

    - Enter their **Full Name**.

    - Select the **License Type**.

    - Select the **Full Text License Type**.

    - The **Status** default is Current.

    - Select the Group List for this user.

3. Complete the remaining fields on the User form as needed.

4. Click Save when done.

Figure 34 - Adding a New Resource to the Remedy User Form

NOTE: A complete description of how to complete this form and administer the AR System users is beyond the scope of this user guide. See the AR System Administrator for more information.

The new resource can now be added to APM, as described in the next section.

Add a New Resource to APM

Once a person has been added to Remedy, they can be added to ActionProgram Manager.

1. Open the APM:Resources form in New mode.

2. Complete the form to add a new resource to ActionProgram Manager.

Figure 35 - Adding a New Resource

- *Resource ID* is generated automatically when you save the resource.

- Select the License Type **Status**.

- Click the Select User button, and select the resource from the selection list that opens. The **Name**, **Login**, Last Name, and First Name fields are completed automatically with the name of the resource you selected.

- Click the Select Assgn Org button, and select the organization to which the resource is assigned from the selection list that opens. The Assgn Org ID and Assg Org Name fields are completed automatically.

- The default hourly Rate is 100.00 dollars per hour. Change this if necessary.

- The defaults for User Req Appr (User Requires Approval) and OT Req Appr (Overtime Requires Approval) are No.

- Select the **Assigned Skills** code from the field's selection list.

- Select the **Assigned Location** code from the field's selection lists.

- Complete the Title, Phone, and other contact fields as needed.

- In the Client Executable Path enter the absolute path to the directory where the APM charting software was installed. If the charting software is installed on the Web and this resource will be using it, then this field is left blank.

- If this resource is going to be using Web Charting, select Yes. Otherwise leave it set to the default No.

3. Click Save when done. The new resource is added to APM, and is now available for task assignments.

Part III:
Planning a Project

This section describes how to create and plan a project in ActionProgram Manager. Creating projects is basically a three-step process that involves creating a new project record, adding tasks and specifying dependencies, and then submitting the project for approval.

- Creating a New Project

- Creating Tasks

- Assigning Resources to a Task

- Creating Summary Tasks and Sub-Tasks

- Defining Milestones

- Creating Dependency Relationships

- Grouping Projects into Pools & Programs

- Determining Tasks on the Critical Path

- Creating a Project Plan Using PPM

- Preparing a Project for Approval

Creating a New Project

The first step in creating a project using APM is for the project manager to create the initial project record.

The project manager creates a project in the APM:Projects Form.

Creating a project record can be grouped into the following steps, which are described in-depth in the corresponding subsections:

NOTE: the field names that appear in these sections in **bold** typeface are required fields for submitting a record in APM. Data values that appear in *italics* typeface are values included with APM. For example, the selection dropdown list for the **Schedule Orientation** field includes *Project Start Date* and *Project Finish Date*.

Open a New APM:Projects Form

1. From the APM:Navigation window Main Menu, select: New Project > Active. The APM: Projects form opens in New mode as shown below:

Figure 36 - The APM:Projects Form

Enter Project Information

1. In the **Project Name** field, enter a unique name for the project. A different name must be used for each project in APM. To see a list of existing project names, click the down arrow button located to the right of the field.

2. In the Category field, select one from the selection dropdown list. The default Category list is *Capital, Client – Billable, Client – Non-Billable, Core Project, Network,* and *Non-Capital*. This list can be customized or removed. See your AR System administrator for assistance.

3. In the Priority, Service Type, and Project Type fields, select values from the selection dropdown lists.

4. In the Project **Description** field, enter a brief description of the project. For a bigger editing screen, click the display field contents button located to the right of the field.

Enter Contact Information

1. In the Sponsor/Stake Holder field, enter the name of the person requesting the project, or click the down arrow and pick a name from the selection list.

2. In the Phone and Organization fields, enter the information for the person you selected.

   Because APM is created in the AR System environment, it can easily be customized to integrate with data in other AR System applications. User information such as organizations and phone number can easily be linked so that data can automatically be back-filled into the appropriate fields. Your AR System administrator can help.

3. In the **Account** field, click the menu list button to the right of the field to open the Selection List window of available accounts. Select the code or account number associated with this project from the list, and click OK.

   The Selection List window closes and your selection appears in the field. This could be a cost center number, organization code, project number or any other code or account number used to track project costs.

4. In the **Proj. Mgr. Id** field, choose a project manager from the selection dropdown list. This is the person assigned responsibility for the entire project.

   The Name field is filled.

5. In the Project Manager Phone and Ext fields, enter the main phone number and extension of the project manager.

6. In the **Responsible Organization** field, select the group with overall responsibility for completing the project.

Define the Project Elements

1. The **Project Status** field is automatically set to the default value of *Plan*. A project cannot be created with any other status value.

2. Select an Approval Process (required). Click the Select an Approval Process button, and select the approval process for this project plan – Technical Approval or Corporate Approval –from the selection list. Click OK and the selection list closes.

   - The Select an Approval Process button is replaced with an Approval Process label and Reselect Approval and Execute Approval buttons. The approval process you selected is displayed below them.

- To select a different approval process, click the Reselect Approval button, which reopens the Selection List for you to make another selection.

3. Select the appropriate Risk field level: *None, Low, Medium,* or *High.*

4. Template. If you wish to apply a project template, click the Use a Template button, which opens the selection list of existing task templates. Select a template, and the following changes occur to the project:

- The Use a Template button is replaced with the Clear Template button until you save the project plan, at which time it changes back to the Use a Template button.

- The template tasks are added to the project, and are now listed in the Task Info tab. (If you do not select a template, the Task Info tab will remain empty until you create tasks later in the planning phase.)

- The Project Plan Start Date and Project Plan Finish Date are calculated according to the Schedule Orientation, the Start or Finish date you entered, and the duration of the template tasks.

- The project also now includes values for planned labor hours and budget, again calculated based on the data in the template you selected.

- Tasks added by the template may be modified. You can add more tasks, and edit, or remove the tasks added by the template.

NOTE: If you click the Use a Template button a second time, the interface will be different. Instead of the template selection dropdown list, the APM:Template Execution form opens. Use this form to specify where in the existing project you want the new template tasks to be placed.

5. In the **Time Unit** field, select *Days* (default) or *Hours* as the unit of time to be used for calculating and scheduling the project. The selection made in this field will automatically set the Time Unit field on the APM:Tasks and APM:TaskDependency forms for all records associated with this project record.

6. In the Schedule Orientation field, click on the selection dropdown list button to select the orientation for scheduling the tasks in the project.

- Select *Project Start Date* (default) to schedule tasks to begin as early as possible.

- Select *Project Finish Date* to schedule tasks to begin as late as possible.

- Select *Task Target Date* to schedule both the start and finish dates based on an anchor to a specific task ((identified as the target task)).

7. In the **Task Notifications** field, select the type of notifications to be used for this project. The options are Assignment Only, Project Approval Only, and Project Approval and Assignment (default).

8. In the **Business Workday Tag** field, click the menu list button, and select the business workday orientation from the list.

9. The Project Plan Start Date field may be entered manually if the selection made in the **Schedule Orientation** field is *Project Start Date*. If no entry is made, APM will automatically set the current date and time in this field.

   The Project Plan Start Date field is grayed out and no entry can be made if the **Schedule Orientation** field is set to *Project Finish Date*. APM will automatically set the current date and time in this field.

10. The Project Plan Finish Date field may be entered manually if *Project Finish Date* is the selection made in the **Schedule Orientation** field. If no date is entered, APM will automatically calculate and set a date and time in this field.

    No Date may be entered in the Project Plan Finish Date field if the **Schedule Orientation** field is set to *Project Start Date*. APM will automatically calculate and set the date and time for this field.

Save theNew Project Record

Before saving a project, review the field entries for accuracy.

1. To save the project, click the Save button in the upper-right corner of the form. The following changes occur to the project record:

- The Project Id field now contains a project record number.

- The Project Manager Id, Project Manage, Project Manager Phone and Extension fields have been set and cannot be modified.

- The Project Plan Start Date and Project Plan Finish Date fields contain the same date and time stamp because there are no tasks in the project plan yet. Once a task record is created, APM will automatically recalculate the schedule and adjust these entries accordingly. Also, depending upon the selection in the Schedule Orientation field, only one of these fields may be modified manually.

Expanded Functionality After Saving

Once the project is saved, several buttons on the form become active for the project record. These buttons are:

Refresh	Refreshes the display of the current project record.
Approve Project	Used for approving the project plan. This button is only visible for User's with approval permission. For more information about the approval process, see the section: Part III: Approving a Project.
Gantt Chart	Displays a Gantt chart for the active project plan.
Create Task	Opens a submit window in the Tasks form to create a task. (For more information, see Creating Tasks on page 71.)
Create Milestone	Opens a submit window in the Tasks form to create a milestone. (For more information, see Defining Milestones on page 81.)
List Tasks/Milestones	Displays a selection of seven query lists for the project plan.

Opening a Project Record

There are several ways to open an existing project record in ActionProgram Manager. These include the APM:Projects toolbar, the APM:Navigation form, and the AR System menu, all of which are discussed below.

Open a project from the APM:Projects t\Toolbar

ActionProgram Manager has a convenient toolbar, which will retrieve the last project record saved, based on the User Login Id. Click on the My Last Submitted Project button and the project record will be displayed.

Figure 37 - Toolbar button: My Last Submitted Project

Open a project from the APM:Navigation Form

To open a project from APM:Navigation form:

1. In the AR System Home Page, click the APM:Navigation link to open the APM Main Menu. The APM:Navigation form provides access to both APM and PPM forms.

2. In the APM:Navigation form Main Menu, click Update Project > Query Active or Active Project.

- If you click Query Active, the APM:Projects form opens in Search mode. Continue with AR System step 3 below.

- If you click Active Project, the APM Dialog Box opens. Select the project from the selection dropdown list and click the Execute button. The APM:Projects form opens with the selected project.

Open a project from Remedy's AR System Menu

To open a project record from the AR System menu:

1. In the AR System User window, select File > Open > Object List. Or click Ctrl+O.

   The AR System Object List opens.

2. Select the APM:Projects form and click OK. The APM:Projects form opens in Search mode.

3. In the **Project Name** field, select a project from the selection dropdown list and click OK. The project name will be set in the field.

4. Click the Search button. The project populates the form.

Adding Tasks

After the project record has been created and saved, you can addtasks and milestones. Even if you used a template, the tasks that were added may still require some modifications for each project.

This section describes the following basic steps involved in creating a task in ActionProgram Manager:

- Open the APM:Tasks form

- Enter task information

- Save the task record

This section also describes the various ways you can retrieve task records after they've been created.

NOTE: Tasks for a project can be created in any order and from anywhere within the project plan. The order that task records are created will not affect the automatic calculations and scheduling done by APM.

TIP: It helps if you outline the tasks, subtasks, milestones and dependency relationships in list or workflow diagram, before creating them in APM.

Open the APM:Tasks Form

1. On the APM:Projects form, click on the Create Tasks button.

   The APM:Tasks form opens in New mode. Certain fields are automatically set by APM:

   - The **Identifier** field is set to *Task*.

   - The project information fields at the top of the Tasks form.

   - The **Time Units** fields are set with data specified in the associated project record.

   - The Status field is set to *Hold* which is the only status a task can have prior to approval of the project plan.

Figure 38 - APM:Tasks Form

Enter Task Information

1. In the **Task Name** field, enter a unique name for the task. The same task name cannot be used for more than one task in the same project. Use the dropdown arrow next to this field to view a list of existing tasks.

2. In the Task Description field, type a brief description of the task. For a larger edit screen, click on the display field contents button to the right of the field.

3. Use the Target Task radio button to indicate whether this is a Target Task. Target Tasks are only used for Schedule Orientations of "Task Target Date".

4. The **Status** field default is *Hold*. **Do no change it.**

   After the project has been approved and executed into the Working Phase, then the project manager may change the status to Assigned, or an Assigned Worker may change the status to *In Process* while working, and *Completed* to indicate the task is done.

5. The Plan Start Date and Plan Finish Date of the task are calculated automatically, based on the plan start and finish dates defined for the project, and the Labor Hrs and Duration fields on the task.

6. If a task start or finish date is not to be determined by dependencies upon other task start / finish dates then in the Constraint field, select a constraint from the following selection dropdown list:

   - ASAP: As Soon As Possible

   - ALAP: As Late As Possible

   - FNET: Finish No Earlier Than

   - SNET: Start No Earlier Tan

   - FNLT: Finish No Later Than

   - MSO: Must Start On

   - MFO: Must Finish On

7. APM will automatically set the WBS of this task unless you wish to specify it yourself. To specify a WBS simply click on the down arrow next to the field named 'WBS'. If you choose to specify the WBS you will be allowed to select another task then asked to choose if the new task is to be before or after than task. If only one choice is possible, the system will automatically select that task for you.

8. Use the Priority field to indicate relative priority of the task.

9. The Duration of the task may be entered manually or automatically calculated. If the calendar duration for the task is known, enter it in the field. Entries can be made as whole numbers or decimals (0.00). For example, if a task is one day long, enter a 1 in the field. If the task is one and a quarter day long, enter 1.25 in the field.

TIP: If the Duration field is left blank, APM will automatically calculate task duration (one time unit) based upon the entries made in the Plan Start Date and Plan Finish Date fields. If one or both of these fields are blank, then APM will use the default task duration for calculation.

10. In the Labor Hrs field, enter the estimated number of work hours it will take to actually complete the task. They can be entered as a whole or decimal number (0.00).

11. In the **Responsible Organization** field, click on the menu list button and select a group from the list. This group is assigned responsibility for the task. The manager of this group will receive all notifications and alerts associated with this task in the project.

12. Select the **Organization ID** and **Name** fields from the selection dropdown list.

    After completing the task fields, you should have something that looks similar to the task record in the following figure.

Figure 39 - Completed Task Record

Save the Task Record

1. Before saving the task, review all fields on the form to make sure they are entered correctly.

2. To save the task record, click the Save button in the upper-right corner of the form.

Figure 40 - Saved Task Record

3. The following changes occur to the task record when you save it:

*   The Task Id field now contains a task record number.

*   The Plan Start Date and Plan Finish Date fields contain date and times.

*   The Slack field has been calculated and set. If the Slack field is 0.00 then APM automatically set the radio button Critical Path.

- Clicking on the Details tab on the form will show that the fields Created By, Create Time/Date, Last Modified By, and Last Modified Time/Date have been set with the User Login Id and the date/time stamp when the record was saved. The Created By and Create Time/Date fields can never be changed. The Last Modified By and Last Modified Time/Date fields will automatically be set each time the project record is modified.

- Clicking on the Schedule button on the form will show that the fields Early Start Date, Early Finish Date, Late Start Date, and Late Finish Date are set with dates and times. These have been automatically calculated and scheduled by APM.

Assigning Resources to a Task

There are two ways of assigning people (i.e., "resources") to tasks using the APM:Tasks form: 1) using the Required Resources tab, and 2) using the Assigned Workers tab. Both methods are described in this section.

Although assigning resources to a task is fairly straightforward, it can also be complex, depending on your project plan. For a detailed tutorial on assigning resources to tasks, see Appendix E: Assigning Resources to Tasks.

Generate the Resource Management Chart

To view a summary of how busy people are, you might want to generate the Resource Management chart before assigning them to tasks.

1. From the APM:Navigation form, select Charts > Resources. The APM:Resources dialog box opens. This is where you define the data you want to see in the chart.

2. Enter a range of dates in the From and To fields, complete the other fields as needed, and click Show RM Chart.

3. The Resource Management chart opens. This chart shows how busy all your resources are. The boxes are color coded:

- If no time has been assigned, the box is white.

- If the person is 1-80% busy, the box is green.

- If the person is 81-99% busy, the box is yellow.

- If the person is 100% or more busy, the box is red. Additional tasks can still be assigned to this person.

4. These calculations are based on the number of hours assigned to that person for that day, divided by the Assignable Daily Hours entered for that person in the APM:Resources form. The Assignable Daily Hours is the average amount of time that person has each day for project tasks.

5. Click the red X in the upper right corner to close the chart. Close the dialog box.

Assign Resources Using the Required Resources Tab

Follow these steps to assign resources to a task using the Required Resources tab on the APM:Tasks form.

1. Open the APM:Tasks form for the task you need to assign, and click on the Required Resourced tab.

2. Click the Add button. The list of skill codes opens. Select the skill code needed for this task, and click OK. The list of locations opens. Select the location where this task will be worked, and click OK. Enter the number of people who will be working this task.

3. Click on the Costs tab. Note how the cost has changed.

4. On the Required Resources tab, highlight the resource code entered, and click the Assign button. The APM:Assignment form opens.

   - Click in the middle of the window to refresh its contents. All of the people with the selected skill code and location are listed in the window. You can review their free hours, rate, and their skill codes. Note that you can see people from different organizations. If people in one organization are swamped, you can look for others who might have more availability.

   - Highlight the name of the person you want. In the Hours to Assign field, enter the hours they are to work. Click on the Assign It button. This closes the form and returns you to the APM:Tasks form.

5. Click on the Required Resources tab. Note that the status for this skill is Assigned.

6. Click on the Assigned Workers tab. Note that the people you assigned to this task are listed in this tab, along with the hours assigned to each, their rate, and their skill and location codes.

7. Click on the Costs tab. Note how the planned labor cost has changed again. Now the planned labor cost is the total of the hours assigned to each person, times their specific rate.

8. Review the Resource Management chart again and see how the resource availability has changed.

Assign Resources Using the Assigned Workers Tab

Follow these steps to assign resources to a task using the Assigned Workers tab on the APM:Tasks form.

1. Open the APM:Tasks form for the task you need to assign, and click on the Costs tab and note the Planned Labor Cost. This is the planned labor hours for the task, times the Responsible Person's rate. As you provide APM with more detailed information, it will recalculate this cost.

2. Click on the Assigned Workers tab and click the Select button. The selection list of skill codes opens.

   - Select a skill and click OK. The location selection list opens.

   - Select a location and click OK. A selection list opens displaying all of the people with that skill code in that location. Additional information for each person is also displayed, but their "free hours" are not known.

   - Select a person and click OK. A dialog box opens.

   - Enter the number of hours that you want to assign to this person for completing this task. Enter a number less than the planned labor hours for the task, and click on the Execute button. If you enter more hours than needed (i.e., more than the total planned labor hours for the task), you will get an error message and will need to adjust the assigned hours. The dialog box closes, and you see a summary of your selections displayed in the Assigned Workers tab.

   - Repeat as many times as you need until you've selected all the people you need for this task.

3. Click the Cost tab. Note that the planned labor cost for this task is now the total of the labor hours assigned to each person times each person's rate.

4. Review the Resource Management chart again and see how the resource availability has changed.

Opening a Task Record

Once a task has been created there are several ways to open an APM:Tasks form:

Open a task from the APM:Projects Form
To Open an Existing Task:

From the APM:Projects form, open the **Task Info** tab, and double-click on a task in the list to open it in an APM:Tasks form.

Open a task from the APM:Tasks Toolbar

ActionProgram Manager has a convenient toolbar, which will retrieve the last task record saved, based on the User Login Id. Click on the Last Task button and the task record will be displayed. Figure 41.

Figure 41 - Toolbar button: My Last Task

Open a task from the AR System menu

1. In the AR System User window, select File > Open > Object List. Or click Ctrl+O.

   The AR System Object List form opens.

2. Select the APM:Tasks form and click OK. The APM:Tasks form opens in Search mode.

3. Click the Select Project button, and select a project from the selection list.

4. Click the Search button.

   If tasks exist for this project, they are listed at the top of the form, and the APM:Tasks form is populated with the first task record in the list.

Creating Summary Tasks and Sub-Tasks

ActionProgram Manager automatically designates a task as a summary task when an associated task record is created as a sub-task.

This section describes how to create the summary task and the sub-task relationship between task records.

For more information see Appendix D – Creating a Multi-Level Project Plan Without Using a Template.

Create Summary Tasks and Sub-tasks

1. Create a new task or open an existing task record.

   TIP: When creating a new summary task record, it's not necessary to enter a Plan Start Date, Plan Finish Date or duration as these fields will be automatically set by APM, based upon the sub-tasks created. Also, it is not necessary to enter the Planned Labor Hours or Assigned User as no actual work is performed against a summary task.

2. in the APM:Tasks form, click the Create Task button. The Selection List window opens.
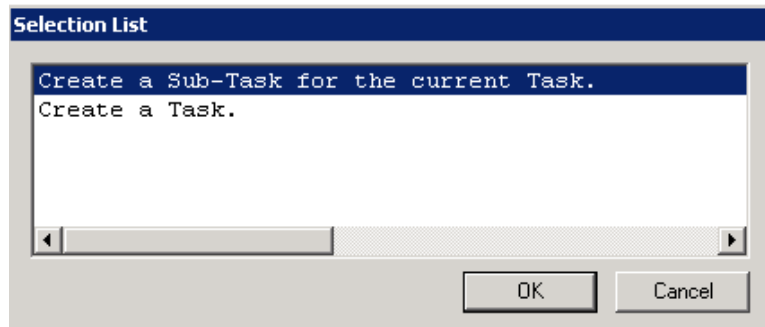
Figure 42 - Selection List Window

The 2 selections are:

- Create a Sub-task for the Current Task: This creates a new task record as a sub-task of the active task record. The sub-task record is a lower WBS task. For example, if the active task were 1.3, then the new task record would be WBS 1.3.1.

- Create a Task: This creates a new task record at the same level as the active task record.

3. Select 'Create a Sub Task for the Current Task' from the list and click OK. A new task record will be opened in an APM:Tasks .

   The Summary Task Name field is automatically set with the name of task designated as the summary task. The **Identifier** field is set to *Task*. The **Status** field is set to *Hold*.

4. Complete the remaining fields as outlined in Adding Tasks, above.

5. Save the sub-task by clicking the Save button on the form.

   The **Identifier** field value of the original task has been changed from *Task* to *Summary Task*. The Plan Start Date, Plan Finish Date, Duration, and Planned Labor Hour fields can no longer be modified manually. As a summary task, these fields are automatically calculated and set by APM based upon the values of related sub-tasks, sub-milestones, and their dependency relationships.

From this Summary Task record, additional sub-tasks and milestones can be created. To do this, click on the Create Task button and repeat the steps outlined above. An unlimited number of sub-tasks can be created.

To retrieve the sub-task record just created, follow the steps outlined in , page 70.

Defining Milestones

A Milestone marks a significant point in time in a project plan. A Milestone has no duration or work associated with it. In ActionProgram Manager, a Milestone record is created in a very similar manner as a Task record.

This section describes the following steps used when creating Milestone records:

- Create a Milestone

- Create a Sub-Milestone

Create a Milestone

1. Open the project record.

2. Click the Create Milestone button on the APM:Projects form. A New APM:Tasks form opens. The **Identifier** is Milestone.

Figure 43 - Creating a Milestone Record in the APM:Tasks Form

NOTE: This is the same form used to create Task and Sub-Task records. The fields are the same as those used to define a task with the following few, notable exceptions:

- The **Duration** field is grayed out and is set to 0, as a Milestone has no duration.

- The **Planned Labor Hrs** field is grayed out and set to 0, as Milestone has no work associated with it in the project plan.

3. Complete the available fields for the Milestone in the same manner as when creating a task.

4. To save the Milestone, click the Save button on the form.

Retrieve the Milestone record the same way as a Task record.

NOTE: The Plan Start Date and Plan Finish Date fields have the same date/time value because a Milestone has no duration.

Milestones do not use constraints like other tasks. Milestones only use dependencies connected directly to other tasks. When all predecessor tasks have been completed, the milestone task status automatically updates to *Complete*, and automatically causes its unique successors to go to an *Assigned* state.

Create a Sub-Milestone

Creating a Sub-Milestone is an almost identical process to that of creating a Sub-Task. Please note, a Sub-Milestone can only be created from a Task record or Summary Task record. Effective project planning standards does not allow for a Milestone to have a summary function.

1. Retrieve a Task or Summary Task record.

2. Click on the Create Milestone button. A selection list window will be displayed with the following options:

- Create a Sub-Milestone for the current task: This creates a new Milestone as a Sub-Milestone of the active task record. The Sub-Milestone is at a lower level. Example: The active record is a level 0; the new milestone would be a level 1.

- Create a Milestone: This creates a new Milestone at the same level as the active task record. Example: The active record is a level 0; new task record would be a level 0.

3. Select Create A Sub-Milestone and click OK. A submit window in the APM:Tasks form opens. The **Identifier** field is automatically set to Milestone.

4. Complete the available fields for the Sub-Milestone in the same manner as when creating a regular Milestone. (See Create a Milestone on page 81.)

5. To save the sub-milestone, click the Save button on the form.

   If this new Sub-Milestone was created using a Task record then the **Identifier** field will be changed to *Summary Task* from *Task*.

Creating Dependency Relationships

An effective project plan includes the sequence in which the tasks and milestones must be performed; you must define the dependency relationships between tasks and milestones.

In a dependency relationship there is a predecessor task, which occurs first in the sequence, and a dependent task, which occurs second in the sequence.

There are four types of dependency relationships:

▪ **Finish:Start**—Predecessor must finish before the dependent can start.

▪ **Start:Start**—Predecessor must finish before the dependent can start.

▪ **Start:Finish**—Predecessor must start before the dependent can finish.

▪ **Finish:Finish**—Predecessor must finish before the dependent can finish.

Create a Dependency

In APM, dependency relationships are created in the APM:Tasks form. This section outlines how to create a dependency relationship.

NOTE: The active record is always the dependent task or milestone in the dependency relationship.

1. Open the Task record of the dependent task or second task in the sequence. (Use the steps outlined in Retrieve the task record on page 76.)

2. Open the **Dependency** tab, which contains the following fields and buttons:

   ● Predecessor Id: The record number of the predecessor task or milestone.

   ● Predecessor Name: The name of the predecessor task or milestone.

   ● Dependency: The type of dependency relationship. (See previous text.)

- Delay: Specifies a delay between the predecessor and dependent tasks.

- Delay Time Units: The planning time unit. This is set by the selection made in the project record.

- Select Predecessor button: Displays a list of task, summary task and milestone records available for creating this dependency.

- Submit Dependency button: Saves the dependency relationship.

- List Dependencies button: Displays a query list of all predecessors defined for this task record.

Figure 44 - APM:Tasks Form, Dependency Tab

3. Click the Select Predecessor button. A selection list of tasks, summary task and milestones for the project opens.

    NOTE: Dependency relationships cannot be created with summary tasks.

4. Select a task or milestone from the list and click OK. This will automatically fill the Predecessor Id and Predecessor Name fields.

5. In the Dependency Type field, select a dependency type from the selection dropdown list. There are four dependency types. The default is *Finish:Start*.

6. In the Delay field, you may specify a delay in the dependency relationship. This is entered as a whole or decimal number (0.00), and can be either positive or negative. If no delay is specified, APM will use a default delay of zero.

7. To save, click on the Submit Dependency button on the form. All the fields will be cleared.

NOTE: The Submit Dependency button is the only way to save a dependency relationship. Using the toolbar button or menu selection for Apply will not save the dependency.

8. Repeat steps-2 – 7 above to create additional dependency relationships for this task record.

View the Dependency List

To view a list of dependency relationships in a project:

1. Click on the List Dependencies button on the form. The APM:Task Dependency form opens, displaying a list of all the dependency relationships in the project.

2. Select a dependency from the list at the top, and view its details in the main body of the form.

   The main purpose of this form is to provide dependency relationship information. The Display buttons open the forms for the Project, Predecessor Task, and Dependent Task.

   However, this form also provides the interface to make changes to the dependency, including canceling it.

Figure 45 - APM:Task Dependency Form

3. The **Status** field is set to the default, *Valid*, indicating that the dependency is in effect. When you cancel a dependency, this field automatically changes to *Invalid*.

   You can also set this field to *Invalid* while you are creating tasks and dependency relationships, to hide them from the plan as you work.

   You can also change the dependency **Status** field to *Invalid* to help you troubleshoot your project. Turn off the dependency and click the Recalc button on the APM:Projects form record, and repeat as necessary to track down a problem by eliminating the possible effects of dependencies.

4. Click Save to save your changes. Close the form to return to the task record.

Create Inter-project Dependencies

In ActionProgram Manager, dependency relationships can also be created between projects by performing the following steps. ((When inter-project dependencies exist, the Gantt char of any project within that dependency will show all of the projects associated together and can become quite a large group.))

1. Open the Task record of the dependent task or second task in the sequence.

2. Open the **Dependency** tab.

3. In the Inter-project Dependencies section, click the Create IPD button.

   The APM:Risk Management form opens, where you can create Inter-project Dependencies. See Figure 46, as follows.

Figure 46 - APM:Risk Management (Inter-Project Dependencies) Form

4. The **IPD Status** field displays *Active*, the default.

    The other values are: *Pending*, *Acknowledged*, *Resolved*, and
    Complete. Change the Status field to reflect the changes to the life of
    the dependency. For example, change the status to *Pending* if you
    need to save the dependency and finish it later with it affecting the rest
    of the project plan.

5. In the Dependency field, select the type of dependency relationship you need.
    The values are: *Project to Project*, *Project to Task*, *Task to Project*, and *Task
    to Task*.

    The fields in the Inter-project Selection area of the form will change
    according to which Dependency you select.

6. In the Dependency Type field, select one of the four dependency types from
    the list. The default value for this field is *Finish:Start*.

7. In the Delay Units field, select Hours or Days.

8. In the Delay field, you may specify a delay in the dependency relationship.
    This is entered as a whole or decimal number (0.00) in the units selected, and

can be either positive or negative. If no delay is specified, APM will use a default delay of zero.

9. Complete the fields in the Inter-project Selection area.

10. When you are done, click Save, and close the form.

Grouping Projects into Pools & Programs

ActionProgram Manager provides a way to group projects together into Pools or Programs, for the purposes of comparison reporting and tracking. (When Pools or Programs are defined, the Gantt chart of all projects within that group can be show by using the 'Pool / Program Gantt Chart' buttons associated with Program or Pool records.)

Create Pools & Programs

1. Open the Project record of the first project you want to include, and go to the Pools/Programs tab.

2. Click the Create Program button.

    The NEW APM:Project Pools & Programs form opens.

Figure 47 - APM:Project Pools & Programs Form

3. Enter a unique **Pool/Program Name**.

4. Complete the other fields as appropriate, and click Save.

   The field values are cleared, and the Pool/Program Gantt Chart, Add Project, and Remove Project buttons become enabled. Close the form.

5. Again in the Pools/Programs tab, click the Select Program button, select your new Pool or Program from the list, and click OK.

   The Program and Program Mgr fields are populated with values from the pool or program you just created, and the Show Program button appears on the tab.

6. Click the Show Program button.

   The APM:Project Pools & Programs form opens, displaying the pool or program you created.

7. Click the Add Project button, select a project to add from the Selection List window, and click OK.

8. To remove a project from the pool or program, highlight the project in the list, and click the Remove Project button.

9. Click the Save button to save your changes, and close the form to return to the Pools/Programs tab.

Determining Tasks on the Critical Path

ActionProgram Manager provides the following several ways to identify those tasks on the critical path of the project plan:

- Critical Path Field: The task record includes a field labeled Critical Path. When APM calculates the project schedule and finds that a task has no slack, it automatically sets this field to show that it is on the critical path.

- List Tasks/Milestones button: The List Tasks/Milestones button on the APM:Projects and AMP:Tasks forms open a selection list that includes the option: List All Critical Tasks. Select this option to view a list of all critical tasks in the project.

- Gantt Chart: All tasks on the critical path are displayed in red on the APM Gantt chart.

- Critical Path Report: APM includes a pre-defined report that generates a detailed list of all tasks on the critical path.

Creating a Project Plan Using ActionPortfolio Manager (PPM)

If you have used PPM to create a proposed project, the final step in that process is to create a detailed project plan. This step is the connection between PPM and APM.

Create a Project Plan

1. On the PPM PMA:Proposed Projects form, **APM:Planning** tab, click the Show APM Project Plan button

   The APM:Projects form opens, populated with the information from your proposed project. See Figure 48.

Figure 48 - Proposed Projects in PPM Enter APM Here

2. Use the APM:Projects form as described in this section to refine and finalize the project plan for your proposed project.

3. Continue with the next topic: Preparing a Project for Approval.

Preparing a Project for Approval

Once the planning process is completed, the project plan is ready for approval.

At this point, it is still possible to make changes to the project plan.

However, to maintain the integrity of the plan, ActionProgram Manager has a special project status called *Pending Approval*. This status "freezes" the records associated with the project plan so they cannot be modified. Only the project manager can execute the project into the approval process.

Execute the Project Approval Process

Only the project manager can execute the project plan into the approval phase.

1. Open the Project record. The **Project Status** is *Plan*. The Reselect Approval and Execute Approval buttons are available. (Figure 49).
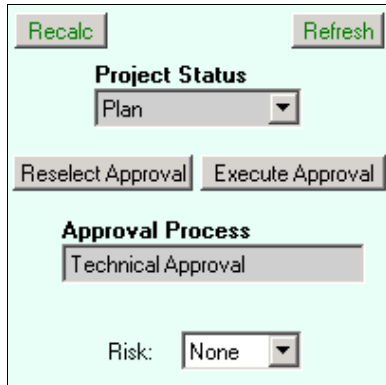
Figure 49 - Project Plan Before Executing the Approval Process

2. Below the **Project Status** field, click the Execute Approval button.

- The project status changes to *Pending Approval*.

Figure 50 - Project Status Pending Approval

- The Reselect Approval and Execute Approval buttons are replaced with the Show Approval Tasks button.

- The event is recorded with a date/time stamp in the project details diary.

- Notifications are sent for the approval tasks.

- All fields are grayed-out except the Gantt Chart button. No changes may be made to the project, tasks, schedule, or budget. The Create Task and Create Milestones buttons also become disabled.

- The planning phase is now suspended. The project plan is frozen; no further changes can be made to the project records until the project is approved or the project status is changed back to *Plan*.

The project is now ready for the next phase: approving a project.

TIP: ActionProgram Manager logs all status changes to the project record in the Project Details field. In addition, this field serves as an excellent tool for recording important notes about the project review during the planning and approval phases.

Part IV:
Approving a Project

When all the tasks, summary tasks, milestones and dependencies have been defined, the project is ready for approval. Approving a project plan is an important milestone in ActionProgram Manager workflow: it signals the end of the Planning Phase and the beginning of the Approval Phase. This section describes the following tasks involved in approving a project:

- Re-planning a project prior to approval

- Approving a project plan

- Executing a project

- Understanding the Baseline plan

Re-Planning a Project Prior To Approval

Project plans frequently change throughout the lifespan of a project. It is often necessary to modify a project plan while preparing it for approval, during the approval process, and during the working phase itself.

While the status is still *Plan*, the project plan can be changed.

When a project plan has been created and the project manager has executed the approval process, the status changes to *Pending Approval*. The project is now "frozen" so that no changes can be made while it's being reviewed and approved.

The only user with the ability to change the project plan at this stage is the project manager. However, ActionProgram Manager provides a way for all project workers to request changes during all project phases. Users can submit change requests, or they can complete the fields on the APM:Tasks form Details tab, even when the project status is *Pending Approval.*

Note Scope Changes

If the project scope changes, make a note in the Scope Changes field on the APM:Projects form, Project Info tab. This is a Project Details diary field, and the note will be tracked with other diary entries.

Make a Change Request

Anyone on the project can make a change request.

1. Open the task record.

2. Click the Change Request link to open the selection list window of possible changes.

3. Select the type of change you need to request, and click OK.

   The window closes and the APM:Change Requests form opens with the appropriate fields for the type of change request you selected.

4. Complete the change request fields, and click the Submit button. A change request notification is sent to the project manager. The project manager will either approve or reject the change request.

Modify Tasks and Milestones

Re-planning a project may involve making changes to Tasks, Sub-Tasks, Milestones or Sub-Milestones. To modify an existing task record:

1. Open the task record to be modified.

2. Make changes to the fields as needed. When all changes are made, click the Save button. The task record has been modified.

For more information about working with Tasks and Milestones, see Part II: Planning a Project.

Modify Dependency Relationships

Re-planning a project may also include modifying an existing dependency relationship.

To quickly find the dependent task records in a project plan, use the List Tasks/Milestones button on the APM:Projects form. Select the List Entire Project for a query list of all task records. Using the horizontal scroll bar, scroll to the far right to view the Predecessor column. Records which have Y in the column are dependent task records.

To modify a dependency relationship, complete the following steps:

1. Open the record of the dependent task.

2. Click on the **Dependency** tab to view the dependency fields.

3. Click on the List Dependencies button to display a query list of all predecessor task records.

4. Make changes to the dependency as needed.

5. To change the status of the dependency relationship, click on the **Status** field list button. Select the status from the menu.

- *Valid*: The dependency relationship is active.

- *Invalid*: The dependency relationship is not active.

6. When all changes are made, click the Save button. The dependency has been modified.

Approving a Project Plan

Your roject approval process can be as simple or as complex as you require. Approval is frequently a multi-step process where various managers and stakeholders review and approve the project plan. You must have the Project Approver role to be able to approve a project plan.

Figure 51 - Project Status Pending Approval

Complete the Approval Tasks

1. After receiving notification that a project plan is waiting for your review and approval, open the project record, and click the Show Approval Tasks button.

   The APM:Approval Tasks form opens, displaying the approval process tasks.

   NOTE: If you do not have approval permission, the Show Approval Tasks button will not be visible on the form.

2. Review the project and enter a log entry. If you need to come back to it later, select *In Process* from the Status selection dropdown list and click the Save button.

   The approval task status in the list at the top changes to *In Process*.

3. To approve the plan, select *Approved* from the **Status** field selection dropdown list (Figure 52), and click the Save button.

Figure 52 - APM:Approval Tasks Form

The approval task becomes italicized in the list at the top of the form. When you refresh, it will display the updated status as *Approved*.

Also, the Status of the next Approval Task in the list changes automatically from *Hold* to *Assigned*.

4. To approve the plan, select *Approved* from the **Status** field selection dropdown list (Figure 52), click the Save button, and close the form.

The process begins all over again with the next project approver, who receives a notification of the task assignment.

5. Once all of the approval tasks have been approved, the Project Status is updated automatically to *Approved*. (Figure 53).

Figure 53 - Project Plan Approved

Once approved, projects can remain in the *Approved* state indefinitely.

Re-Planning an Approved Project

The wait between a project plan being approved and the project actually starting may be long enough that conditions change, and the project will need to be re-planned.

Re-plan an Approved Project

1. Open the project record. The **Project Status** is *Approved*.

2. Click the Reselect Approval button, select an approval process from the list, and click OK.

   The Project Status changes back to *Plan*.

   The Execute Project button changes back to *Execute Approval*.

3. Repeat the process described to approve the project plan.

Executing a Project

Executing the project plan is one of the most important steps in ActionProgram Manager. This action creates the Baseline plan, and launches the project into the Working Phase.

Execute a Project

When you're ready to begin working on the project, complete the following:

1. Open the project record.

   The **Project Status** is *Approved*. (Figure 53).

2. Click the Execute Project button.

3. The Project Status changes from *Approved* to *In Process*, and all approval process buttons are removed from the form. (Figure 54).

Figure 54 - Project In Process

A number of important changes occur to the project record at this moment:

- Project Status: Changes from the approval phase to the working phase by changing the project record status from *Approved* to *In Process*.

- Baseline Plan: Save the active project plan as the Baseline plan. Comparative Gantt charts and reports can now be utilized. A Baseline plan is captured and the Baseline button on the Projects and Tasks form becomes active. The fields are automatically set with the Baseline plan information; these fields cannot be modified. The Comparative Gantt chart can now be viewed.

- Task Status: Based on the start date, the first tasks of the project are changed from a status of *Hold* to *Assigned*. The Assigned Worker can accept the task and work can begin.

- Work Time: Tasks may begin to become active and work time can be logged against active tasks.

- Schedule: Notifications and Schedule Alerts are activated.

- Diary Entry: The event is recorded with a date/time stamp in the project details diary.

Understanding the Baseline Plan

When the project plan is executed, the Baseline plan is created.

The Baseline plan is the desired schedule for how the project should proceed. Unlike plan dates, which can be changed during the project if necessary, the Baseline plan is fixed—it does not change and cannot be modified.

Figure 55 - Project Baseline

The Baseline plan provides a valuable tool for comparing actual progress against the desired plan. During the working phase, a Baseline plan can be used with the planned and actual date to help keep the project implementation on track. Once a project is completed, comparing the Baseline plan with the Actual plan highlights project planning and management successes and opportunities for improvement.

NOTE: If a project plan is modified after approval, these changes will NOT be reflected in the Baseline plan. Changes made during the Working phase will only be reflected in the plan and actual dates of the project plan.

ActionProgram Manager includes comparative Gantt chart and variance reports to review the Baseline and Actual plans.

Part V: Working a Project

When the project manager executes the approved project, the Working phase begins. Tasks are assigned and worked. Work time may be logged against the tasks. The project plan is monitored through automated notifications and schedule alerts allowing the project manager the ability to re-plan the project if necessary. When all of the tasks are complete, the project is complete.

This section of the manual describes the following tasks involved in the Working phase:

- Viewing The Task Schedule

- Accepting Task Assignments

- Reassigning A Task

- Using Task & Project Notes

- Completing Tasks & Milestones

- Revising The Project Plan

- Tracking Work Time & Expenses

- Approving Time & Expenses

Viewing the Task Schedule

ActionProgram Manager provides detailed information about a task's schedule on the APM:Tasks form.

To view a task's schedule information, go to the APM:Tasks form > **Schedule** tab.

Figure 56 - Task Schedule

The following fields are shown on the APM:Tasks form Schedule tab:

- Early Start Date – The earliest date that a task can begin work. This is based upon the plan dates and dependency relationships.

- Early Finish Date – The earliest date that a task can finish work. This is based upon the early start date and duration.

- Late Start Date – The latest date that a task can begin work without delaying the project finish date. This is based upon the plan dates and dependency relationships.

- Late Finish Date – The latest date that a task can finish work. This is based upon the late start date and duration.

- Base Start Date – The plan start date captured in the Baseline plan when the project was executed. This date is used in the comparative Gantt chart and variance reports.

- Base Finish Date – The plan finish date captured in the Baseline plan when the project was executed. This is used in the comparative Gantt chart and variance reports.

- Base Duration – The plan duration captured in the Baseline plan when the project was executed.

- Actual Start Date – The start of the task. It is the date/time stamp when the task status changed to *In Process* from *Assigned*.

- Actual Finish Date - The finish of the task. It is the date/time stamp when the task status changed to Complete from In Process.

Accepting Task Assignments

A task is ready to for someone to work on it when its status is changed from *Hold* to *Assigned* and the responsible person receives a notification that the task has been assigned to them.

When the responsible person changes the task's status to *In Process,* he/she has accepted responsibility for accomplishing the task. This status change signifies the actual start date of the task in the project plan.

Open the Task Record

1. Open the project record in the APM:Projects form.

2. Click the List Tasks/Milestones button to open the selection list of tasks, summary tasks, and milestones associated with the project plan.

3. Select List Entire Project and click OK.

    6. A query list is displayed at the top of the form of all the tasks, summary tasks, and milestone records associated with the project.
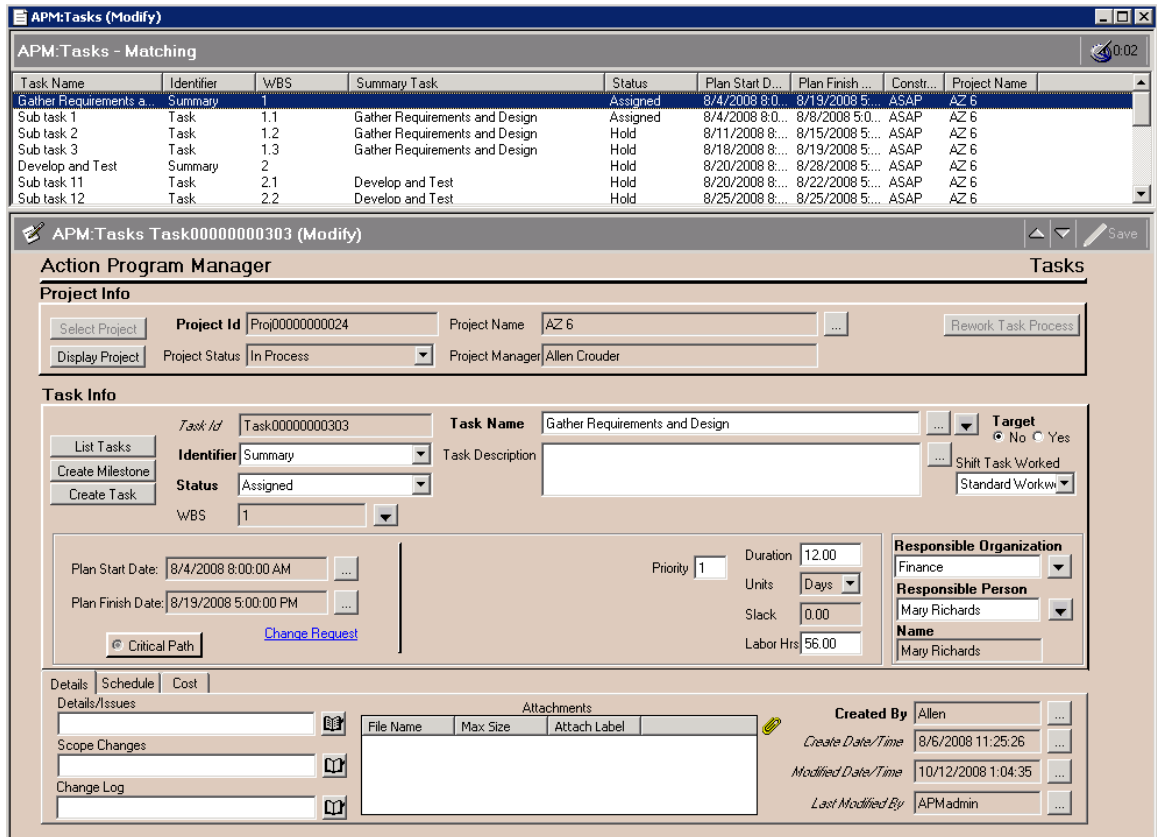
Figure 57 - Task Query List

4. Select the task record you need from the list.

TIP: There are other methods to open an Assigned Task record. Another way is to open the task record using the Task Id number. This is included in the notification sent when the task is assigned. Using this method, open a query window for the APM:Tasks form and in the Task Id field, enter the Task Id number. Click the Search button to open the task record in Modify mode.

Change the Task Status to *In Process*

1. Select *In Process* from the **Status** dropdown list.

   The options in the **Status** field dropdown list are as follows:

   - *Hold* – The task is in a pending state and no work can be performed against it. A task has this status until it is assigned based upon the project schedule and dependency relationships. A milestone has this status until all its predecessor tasks are completed. All task records have a status of *Hold* during the planning phase.

   - *Assigned* – The task has been assigned for work and is ready to be worked. This status is set automatically by ActionProgram Manager, based upon the project schedule and dependency relationships. Milestones do not have this status.

   - *In Process* – The task is active and being worked. This status is manually set by the Assigned Worker or the Task Responsible Party to indicate that responsibility for the task has been accepted. Milestones do not have this status.

   - *Complete* – The task is complete and all related work finished. For milestones, this status is automatically set by APM when all its predecessor tasks are completed.

   - *Cancelled* – The task is cancelled

   - (clear) – Clears the field.

2. Click the Save button on the form to submit the status change.

Figure 58 - APM:Tasks Form, Status is *In Process*

Actual Start Date

When you change the task's status to *In Process*, the date and time stamp is recorded as the actual start date for the task. ActionProgram Manager automatically enters it in the Actual Start Date field on the APM:Tasks form. This entry cannot be modified.

The Actual Start Date is then used for all reports and Gantt charts. In comparative charts and variance reports, it is compared against the Baseline value recorded in the Base Start Date field. Tasks with a status of *In Process* are defined with the Actual Start Date and Plan Finish Date

Work the Task

Now that the status has been successfully changed, work can begin on the task.

Notes can be entered in the APM:Tasks form Details tab fields.

Work time can be entered against a task in the Work Time tab (which will not be visible until the Task Status is *In Process*).

If needed, the task labor hours can be assigned to other assigned worker(s), and potential problem issues can be flagged for the project manager.

Assigning the actual working of a Task

At any time during a project, the labor hours associated with a task may be assigned to any assigned worker(s). Tasks may need to be assigned for a variety of reasons. For example, the responsible person may no longer be available, or is unable to complete the task, or was never intended to be the actual worker of the task. During the planning phase, the assigned worker(s) may not have been specified, and now, during the working phase the group manager can choose to assign the task labor hours to specific worker(s).

A tasks labor hours can be assigned by the Task Responsible Organization, the project manager, or the responsible person.

Assign Task Labor Hours

1. Open the task record in the APM:Tasks form > **Assigned Worker** tab.

2. To remove an assigned worker, select their name and click the Remove button. They are removed from the task.

3. Click the Select button to display a selection list of members of the Task Responsible Organization.

4. Select a worker name from the list and click OK.

5. Click the Save button to submit the change.

   APM will automatically send a notification about the task labor hour assignment to the new assigned worker, as well as the Task Responsible Organization and the project manager.

Using Task & Project Notes

During the course of a project, information beyond the start and finish dates, durations, and work time are needed to understand the real status and progress of a specific task or the entire project. ActionProgram Manager provides several ways to log this information and more, at both the task and project levels.

Use the Project Details Field

The Project Details field on the APM:Projects form provides a view of the project beyond the schedule dates and work hours. In addition to a convenient notepad for the project manager, this field captures a chronological log of important project events and task-related notes.

The following three types of entries are made to the Project Details field:

- Project Record Events: Automatic entry of when the record is created, status changes, and project approval.

- Project Record Notes: Manual entry of project notes in the field.

- Task Details Field Roll-Up: Automatic roll-up and entry from the task records.
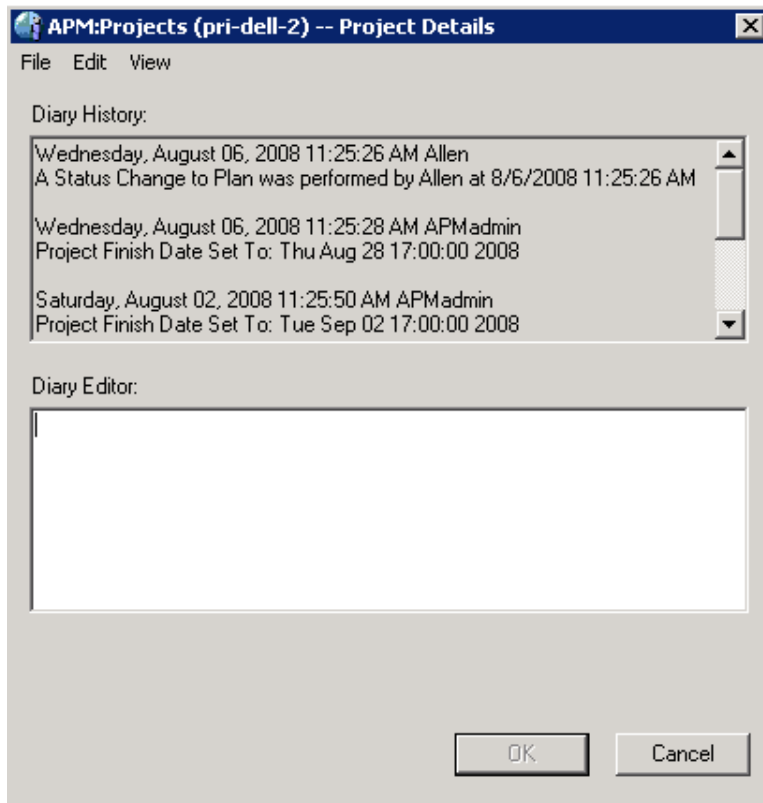
Figure 59 - Project Diary

Each entry includes the date and time stamp and Login Id. Task roll-up entries include the task name path so the origin can easily be identified.

Make an Entry in the Project Details Field

1. Open the project record in the APM:Projects form.

2. In the **Project Details** field, type the information to be logged. For a larger typing area, click on the button to the right of the field. Click OK to save your note and close the entry screen, or click Cancel to exit this screen.

3. Click the APM:Projects form Save button to submit the entry.

View the Project Details Field

1. Open the project record in the APM:Projects form.

2. In the **Project Details** field, click the button to the right of the field to open the Diary Editor box. (Click Cancel to close the box.)

Note Scope Changes

If the project scope changes, you can make a note of the fact in the Scope Changes field on the APM:Projects form > Project Info tab. This note will be tracked with a diary entry.

Use the Task Details Tab

The Details tab on the APM:Tasks form provides a convenient place for workers to document a task and its progress. Entries in the Details/Issues, Scope Changes, and Change Log fields allow a worker to quickly and easily comment on issues that may be helpful to other workers on the task, the members of the Task Responsible Organization, or the project manager.

You can also add task documents as attachments. The Task Details fields provide another dimension to viewing a task's status and evaluating its success.
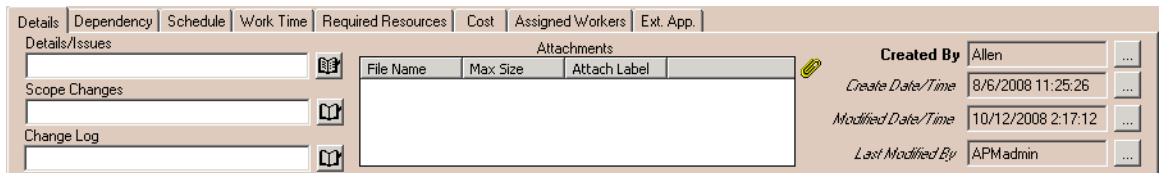
Figure 60 - Details Tab on the APM:Tasks form

Make an Entry in the Details Tab

1. Open the Task record in the APM:Tasks form.

2. In the fields provided on the **Details** tab, enter the information to be logged. For a larger typing area, click on the button to the right of the field. Click OK. (Click Cancel to exit this entry screen.) Click the paperclip button to add an attachment.

3. Click the Save button to submit the task entry.

Entries made in the Details tab are stored chronologically with a date and time stamp and Login Id. In addition, they are rolled up through the project to the same field in related summary task records and ultimately into the Project Details field of the project record.

View the Task Details Field Entries

1. Open the task record in a modify window of the APM:Tasks form.

2. In the **Task Details** field, click on the button to the right of the field. The Diary Editor box opens and you can view all entries.
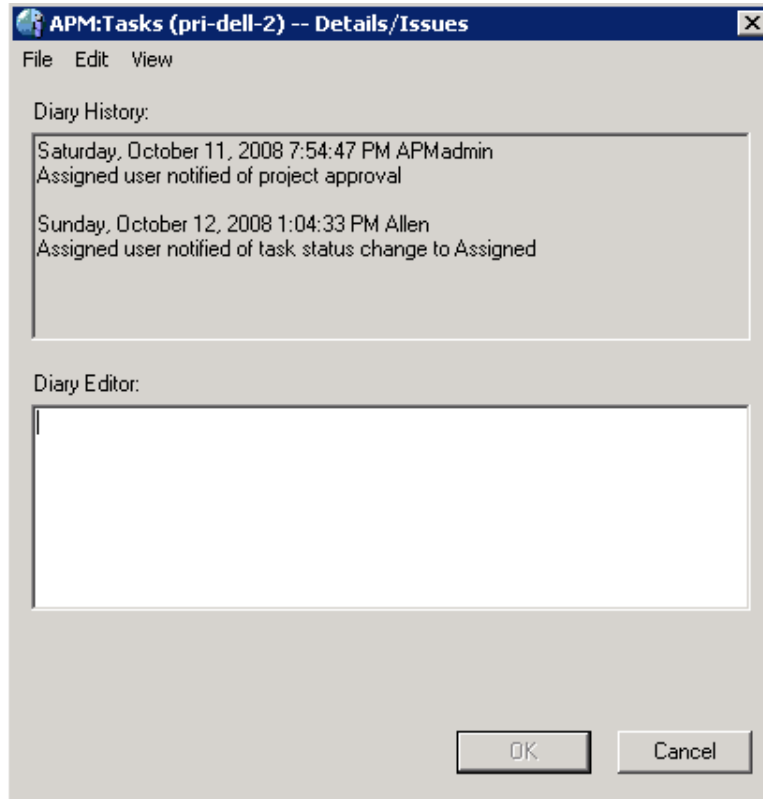
Figure 61 - Task Details Field

3. Click the Cancel button to exit.

Adding Project Documentation

One of the most challenging aspects of any project is keeping track of all the various files that go with it. Use the APM:Projects form > Record Info/Documentation tab to attach these files directly to the project record. Click on the paperclip icon to attach a file.

Completing Tasks & Milestones

Tasks, summary tasks and milestones are accomplished differently in ActionProgram Manager. Tasks in APM are completed only when the work is finished and the status of the task record is changed to *Complete*.

Summary Tasks are automatically completed when all related sub-tasks and milestones have been completed. When the last Summary Task sub-task is changed to a status of *Complete*, then APM automatically sets the Summary Task status to *Complete*.

Milestones are automatically completed when the last predecessor task record is completed. APM automatically sets the status to *Complete*.

Complete a Task

1. Open the task record in a modify window of the APM:Tasks form.

2. In the **Status** field, select *Complete* from the menu list.

3. Click the Apply button on the toolbar to submit the status change.

Actual Finish Date

When a task's status is changed to *Complete*, a date and time stamp is recorded as the actual finish date for the task. ActionProgram Manager automatically enters it in the Actual Finish Date field on the APM:Tasks form. This entry cannot be modified.

The Actual Finish Date is then used for all reports and Gantt charts. In comparative charts and variance reports, it is compared against the Baseline value recorded in the Base Finish Date field. Tasks with a status of *Complete* are defined with the Actual Start Date and Actual Finish Date.

Revising the Project Plan

Although every effort may be made when starting a project during the planning and approval phases, once work begins revisions may still need to be made to accommodate changes. This may involve revising tasks and adding tasks/milestones.

Anyone on the project can propose revisions to a task, or notify the project manager of possible impacts to the task and schedule during the working phase. Only the project manager can actually modify the project schedule and plan.

Revise the Project Plan

1. Open the project record in the modify window of the APM:Projects form.

2. Change the project plan as needed. You can edit the Product Details or Scope Changes field on the APM:Projects form. You can add, modify, or remove tasks and milestones.

3. Save your changes.

ActionProgram Manager will automatically log any revisions to the Task Details tab that will be rolled up to the Details of any Summary Tasks and to the Project Details tab of the project record. (For more information about the Details field, see Using Task & Project Notes on page 107.)

If changes are made to any other tasks in the project plan, ActionProgram Manager will automatically notify the Responsible Organization manager and assigned worker of the changes.

Tasks and milestones added during the working phase will not have any Baseline data for use in comparative charts and variance reports. Baseline data is captured for the entire project when it is executed. Tasks and milestones added after approval were not part of the original plan and are not reflected in the Baseline plan.

Tracking Work Time & Expenses

ActionProgram Manager logs and tracks work time and expenses against a task record. This work time is then rolled up to Summary Tasks, and ultimately for the entire project.

Each task is assigned to a specific person; however multiple people may actually work on the task. ActionProgram Manager enables each worker's time to be logged and tracked for a task, regardless of who is the assigned worker.

During the planning phase, ActionProgram Manager has the option to estimate the work time required for each task. If used, APM will automatically compare the hours being logged against the planned hours for a task. If the logged work hours exceed the planned hours, a notification is automatically sent to the project manager.

Entering work, and non-work time and expenses in APM is very convenient. You can reach the time and expense sheets from several options on the APM:Navigation form, and also from buttons on the Work Time tab in a Task record.

Open Time and Expense Sheets From the APM:Navigation Form

The quickest ways to reach the time and expense forms is through the buttons on the APM:Navigation form:

- To open the Time & Expense Tracking form: select Time Entry > Timesheet. The Time & Expense Tracking form opens. Continue with the instructions in the Record Your Work Time and Record Your Expenses sections below.

- To open a task record directly from the APM:Navigation form: select Time Entry > Task Work. The APM:Dialog Boxes dialog opens. Enter the project name and task name, or select them from the dropdown lists. Click the Execute button. The APM:Tasks form opens. Open the Work Time tab, where buttons are provided that will open the time and expense entry forms. Again, continue with the instructions in the Record Your Work Time and Record Your Expenses sections below.

NOTE: The task **Status** must be *In Process* for the Work Time tab to be available.

- To enter non-project related hours and expenses, such as vacation time, sick time, or travel expenses: select Time Entry > NonProject > Enter Time. The New PRI:Time Tracking form opens, where you can enter non-project hours and expenses. Continue with the instructions in the Enter Non-Task Work Time & Expenses section below.

Record Your Work Time

The PRI:Time & Expense Tracking form ("timesheet") provides a convenient way to enter work time and expenses for multiple projects, or to record time and expenses for the same task over multiple days.

1. From the APM:Navigation form select Time Entry > Timesheet.

   The PRI:Time & Expense Tracking form opens, displaying your total time for the current week.) (Figure 62).

Figure 62 - Time & Expense Tracking Timesheet

> NOTE: Click on the clock and dollar sign icons to switch the form
> back and forth between Time and Expense records.

2. To view time or expenses from a different week, click the down arrow next to the "Week Of" date to open the calendar tool. Pick a date and click OK. The calendar closes. Click Refresh on the Time & Expenses Tracking form to update the form view. The timesheet displays all the task records worked for that week.

3. To add a time entry record for another task or project: click the New Task button. The Time by the Week by User window opens.

Figure 63 - PRI:Time by Week by User

> Use this form to add project tasks or other types of work time to your
> timesheet to make time entry easier and more convenient.

4. Select the type of task or work time from the **Request Type** field selection dropdown list. Click the **Task ID** dropdown arrow. The dialog box opens displaying the list of available project records.

Figure 64 - Available Project Records

5. Highlight the project task you want, and click Select. The dialog box closes, and the **Task ID** and Task Name fields in the PRI:Time by Week by User form are filled in automatically.
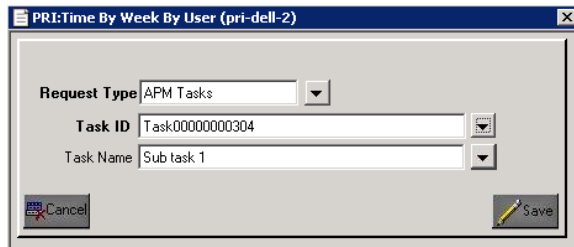
6. Click Save. The form closes. The project task is added to the Timesheet and you can record your hours for it.

7. To record your work time: double-click on a project record in the Timesheet. The time tracking form opens, displaying the hours for the current week.
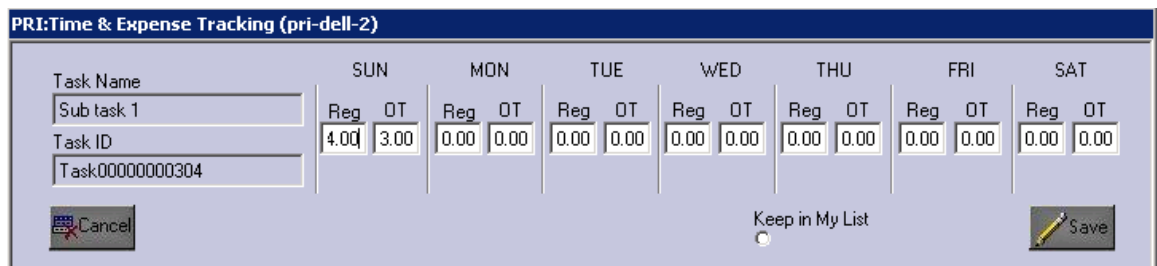
Figure 65 - PRI:Time & Expense Tracking Timesheet - Record Detail

8. Enter your hours (Regular and Overtime), and click Save. The form closes and the work time is added to the task record. Refresh the Timesheet display if needed to see your entry.

Record Your Expenses

1. In the Timesheet, click the large dollar sign to switch from time entry to expense entry. Entering expenses works the same way as entering work time described above.
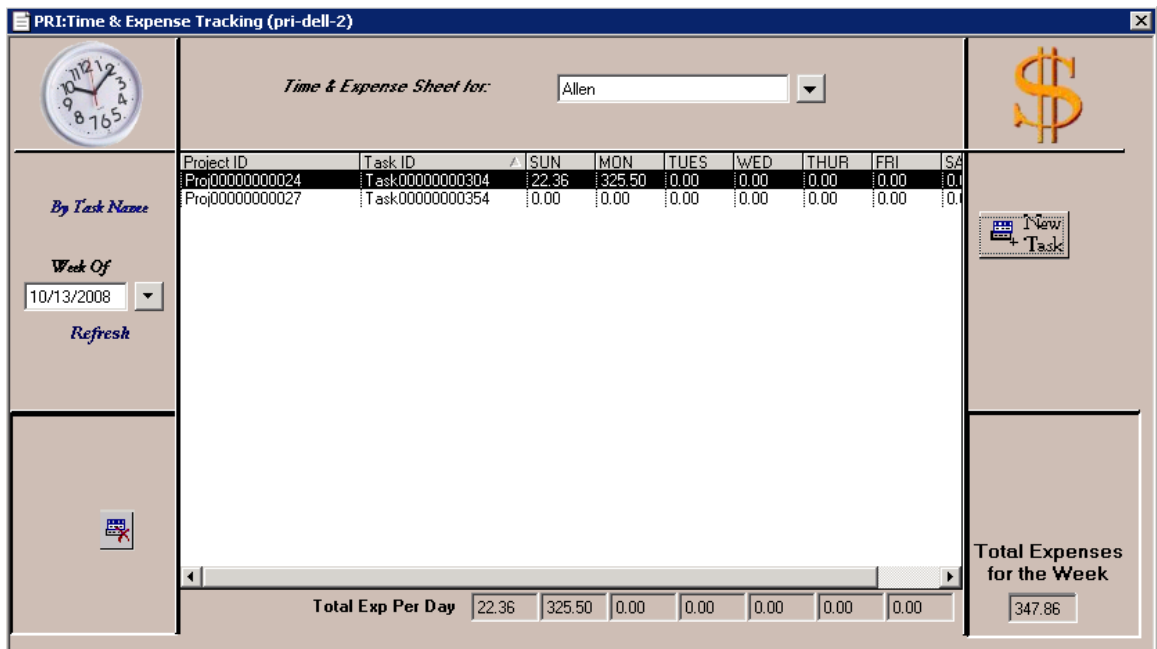
Figure 66 - PRI:Time & Expense Tracking Expense Sheet

2. To add an expense record for each project for which you have expenses, click the New Task button. The APM:Expenses by Week by User form opens.
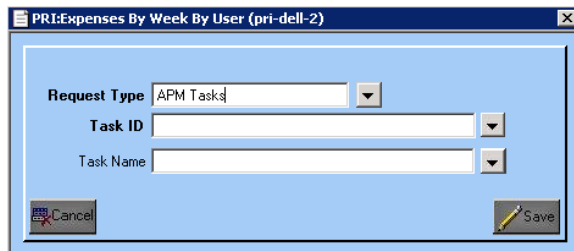
Figure 67 - PRI:Expenses by Week by User

Use this form to add project or other types of expenses to your timesheet to make expense entry easier and more convenient.

3. Select the type of task or work time from the **Request Type** field selection dropdown list. Click the **Task ID** dropdown arrow. The dialog box opens displaying the list of available project records. (Figure 64)
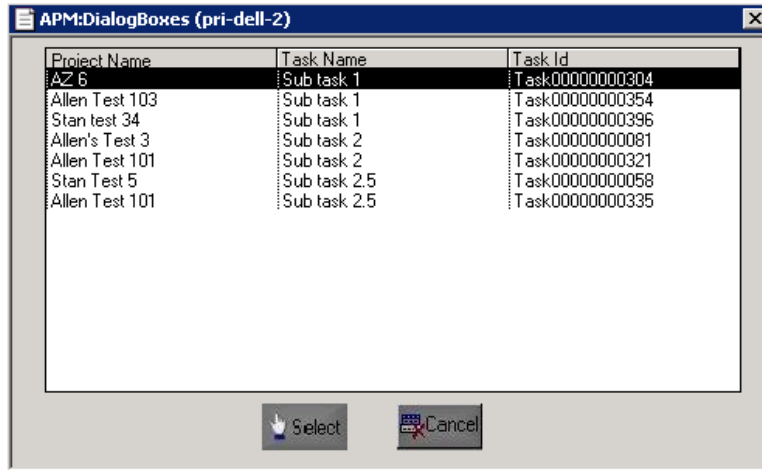
4. Highlight the project task you want, and click Select. The dialog box closes, and the **Task ID** and Task Name fields in the PRI:Time by Week by User form are filled in automatically.

5. Click Save. The form closes. The project task is added to the expense sheet and you can record your expenses for it.

6. To record your expenses: double-click on an expense record in the Timesheet expense list. The detailed expense tracking form opens. (Figure 68).

Figure 68 - PRI:Time & Expense Tracking Expense Sheet - Record Detail

7. Enter your expense information in this form and click Save.

The expense is added to the task. Refresh the Time & Expense Tracking Timesheet if needed to see your changes.

Edit Your Time and Expense Entries

To edit your time or expense entries, simply open the record in the Timesheet, make your changes, and Save.

Enter Your Work Time and Expenses In the Work Time Tab

Sometimes it's more convenient to track time directly while you're working on a task. The Time & Expense Tracking Timesheet forms may be opened from the APM:Tasks form > Work Time tab. (Figure 69).

Enter Your Work Time and Expenses From the Work Time Tab

Instead of using the PRI:Time & Expenses Tracking form, you can enter work time and expenses directly into the Work Time tab on the APM:Tasks form.

1. Open the APM:Tasks form> Work Time tab. Select your User name, date worked, and the account from the selection dropdown lists and calendar on the tab.
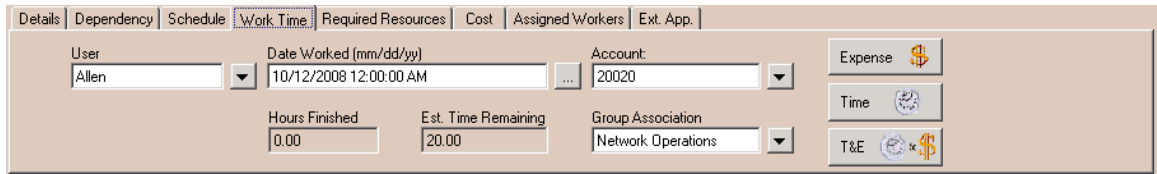
Figure 69 - Work Time Tab

2. Click the Time button to record your hours. The PRI:Time Tracking form opens with the **User**, **Date Worked**, and Account Code filled with the values you selected. (Figure 70).
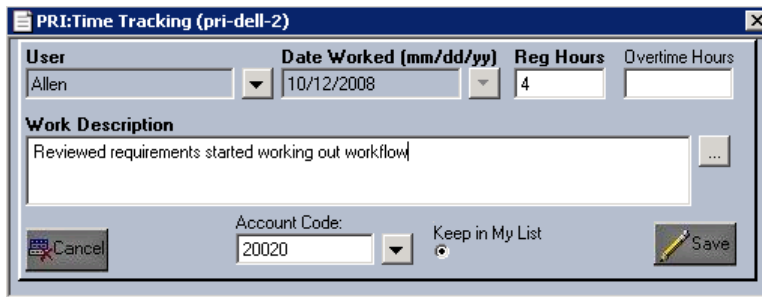
Figure 70 - PRI:Time Tracking Form

3. Enter your work hours into the **Reg Hours** field (or Overtime Hours if overtime).

- Hours are always entered as whole hours and/or increments of hours in a decimal format.

- For example: two hours is entered as 2 or 2.00; two and half is entered as 2.5 or 2.50, etc.

4. In the **Work Description** field, enter a description of the work performed, and click Save. The form closes.

Your work time is recorded in the project. You may need to refresh the Timesheet to see your time reflected in the Work Time tab Hours Finished and Est. time Remaining fields.

5. Click the Expense button to record your expenses.

The PRI:Expense Tracking form opens. (Figure 71).

Figure 71 - PRI:Expense Tracking Form

6. Complete your expense information, and click Save.

Your expense information is registered in the project.

View Task Time and Expenses

To view all time worked on this task and all expenses as well, click the Work Time tab T&E button to open the Timesheet.

Although a single person is assigned responsibility for a task, multiple people may actually work on it and have time to log against the task. The User field on the APM:Tasks form allows time to be entered on behalf of any worker, regardless of the assigned worker for the task or the active Login Id when the time entry is made.

When a work time entry is made, ActionProgram Manager automatically updates the following fields on the task record:

- Hours Finished: The sum of all work hours entered for this task.

- Est. Time Remaining: The difference between the value in the Hours Finished field and the Planned Labor Hrs. field. If the planned labor hours were not estimated (field value = 0.00) during the planning phase of the project, then the Est. Work Time Remaining field remains at zero.

- If work time was estimated during the planning phase, APM will automatically send a notification to the project manager the total Hours Finished on a task exceeds the Planned Labor Hrs. for the task. If the Planned Labor Hrs. field has a value of zero, then APM will not send a notification.

In addition, ActionProgram Manager rolls up the work time entered for all tasks and tracks the sum in the project record. The next time the project record is refreshed, the actual schedule and cost fields will reflect the new work time entries and costs.

TIP: Work Time entries can be made while the task record has a status of *In Process* or *Complete*. However, when the project is finished, the status is *Complete*, and no further Work Time entries can be made.

To keep time-tracking accurate, we recommend that all work time be logged against the task as it is being accomplished.

Enter Non-Task Work Time & Expenses

APR also provides a way to enter non-task work time and expenses, which is described in this section.

1. From the APM:Navigation form select Time Entry > NonProject.

   The PRI:Time Tracking form opens in New mode.

Figure 72 - PRI:Time Tracking form

Time and expenses entered here may or may not be entered against a project. **Bold** fields are required fields. Non-project time and expenses may be entered on this form. This form works the same way as the other time and expense forms described in the previous sections.

2. When you're done entering your time and expenses, click Save.

Viewing Work Time and Expense Entries

You may view work time and expense records in the same forms listed in the sections above that are used for entering.

Approving Time & Expenses

This task is completed in the PRI:Approve T&E form as described below:

Approve Work Time and Expenses

1. Select APM:Navigation > Time Entry > Approve T&E.

The PRI:Approve T&E form opens, displaying the Time Approval
sheet for the current week.

Figure 73 - PRI:Approve T&E Time Approval form

2. Use the Week Of calendar to select a different week and click Refresh.

3. Double-click on a time entry to view the details.

4. Select one record, or select multiple records by holding down the Shift/Ctrl
    keys, and apply the required operation: *Approve, Approve All, Reject* or *Reject
    All*.

5. To approve expenses, click the dollar sign to view expenses.

    The Expense Approval sheet displays the expense entries for the
    current week. Again, select one record, or select multiple records by
    holding down the Shift/Ctrl keys, and apply the required operation:
    Approve, *Approve All*, *Reject*, or *Reject All.*

Figure 74 - PRI:Approve T&E Expense Approval

Part VI:
Completing a Project

Completing a project involves the completion of all tasks in the project plan and evaluating the plan implementation. This section includes the following topics:

- Closing a Project

- Reviewing a Project

Closing a Project

ActionProgram Manager automatically manages the closing of a project plan after all tasks are completed and milestones achieved. This is accomplished when the last task record of the project goes from a status of *In Process* to *Complete*. ActionProgram Manager then automatically implements the following actions to close the project:

- The Actual Finish Date field on the project record is set with a date and time stamp for the status change.

- The *Completed* status change is logged to the Project Details field.

- No modifications, additions, or deletions can be made to the project record or any related task record.

- No additional work time entries can be made against tasks in the project plan.

Reviewing a Project

A critical component to determining a project's success and ensuring the success of future projects involves the review and analysis of the Baseline versus the actual plan implementation. ActionProgram Manager captured the planning information through the Baseline plan, which was taken when the project plan was approved. It also captured detailed information during the implementation of the plan.

It is important to do a timely and accurate assessment of a project. Using APM's tools, it's easy to highlight the project successes and opportunities for future improvement. For more information about these reporting and charting tools, see the next section, Part VII: Viewing a Project.

Part VII:
Viewing a Project

ActionProgram Manager has a number of different tools for managing and monitoring a project, including charts, reports, query lists, and the details log. This section covers how to work with the following tools:

- Gantt Charts

- Pre-defined Reports

- Pre-defined Query Lists

Gantt Charts

ActionProgram Manager has an integrated charting program that will automatically generate Gantt and Comparative Gantt charts for a project plan. The Gantt chart provides a graphic representation of the project and displays task details. The chart information includes:

- Task Name, type (task, summary task or milestone), and status

- Start and Finish Dates

- During the Planning Phase: Charts Plan Start and Finish Dates

- During the Working Phase varies based on the task status:

- Status of Hold or Assigned charts Plan Start and Finish Dates

- Status of In Process charts Actual Start and Plan Finish Dates

- Status of Completed charts Actual Start and Finish Dates

- Review Phase charts Actual Start and Finish Dates

- Duration

- Dependency Relationships

- Responsible Organization

- Tasks on the Critical Path (displayed in red)

Open a Gantt Chart

To open a gantt chart from the APM:Projects form, click the Gant Chart button. Before using the Gantt Chart it is important to make sure that the user's APM:Resource record has been configured properly. Gantt chart software can be installed either locally or on the web and each user may select how this software is to be accessed.

The APM:Resource record has a field named 'Web Charting' which must be selected as "Yes" or "No". If "No" is selected then the user can install the software locally and then place the path to this software into the field 'Client Executable Path'. (Make sure the path ends with a slash.) See Figure 78 for sample APM:Resource form.

NOTE: The Gantt Chart button is not available until a task or milestone record has been created for the project.

To open a gantt chart from the APM Navigation form, follow these steps:

1. From the APM:Navigation form select Charts > Gantt. The APM:Dialog Boxes form opens.

    7. Select a **Project Name** from the selection dropdown list, and click Execute.

    8. The Gantt chart for that project opens. (Figure 75)

    9. Click on the "+" icons to expand sections of the project, or "-" to collapse them.
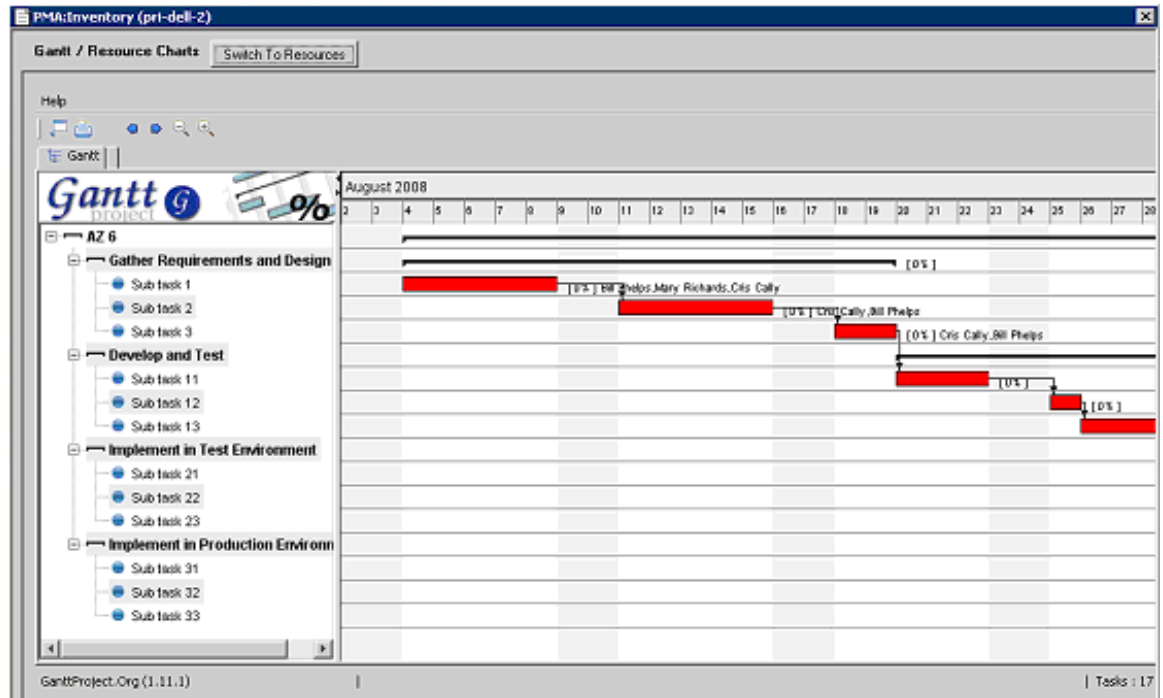
Figure 75 - Gantt Chart of a Project In Process

Comparative Gantt Chart

The Gantt chart graphically compares the plan and/or actual project data with the Baseline plan. The chart has stacked rows of bars and symbols with the lower set charting the Baseline plan and the upper set charting the planned and/or actual data. If a task or milestone is added after a project is approved, then it will not have a Baseline bar or symbol.

The comparative Gantt chart is available during the working and review phases of a project. It cannot be viewed during the planning phase since the Baseline plan is not saved until the project is approved. The chart includes:

▪ Task Name, type (task, summary task or milestone), and status

▪ Start and Finish Dates, and Duration

▪ During the Working Phase, varies based on the task status:

▪ Status of *Hold* or *Assigned* charts Plan Start and Finish Dates

▪ Status of *In Process* charts Actual Start and Plan Finish Dates

▪ Status of *Completed* charts Actual Start and Finish Dates

- Review Phase charts Actual Start and Finish Dates

- Baseline Start and Finish Dates, and Duration

- Slack

- Dependency Relationships

- Responsible Organization

- Tasks on the Critical Path (displayed in red)

Pre-defined Reports

ActionProgram Manager includes twenty pre-defined reports, which are compiled and then generated in Crystal Reports. Once the report is in spreadsheet format, it can easily be saved, distributed, and sorted

This section describes how to run a report and provides detailed information about the individual reports included with ActionProgram Manager.

Run a Report

Reports may be run from the APM Navigation form. The reports are listed below organized the same way they are organized on this form:

Figure 76 - APM:Navigation > Reports

DETAILS

Project Summary Report

This report provides a one-page summary of a project's progress and success. It is run for a specific project and provides the following information:

- Dates – This portion of the report outlines the start and finish dates for plan, Baseline and actual start and finish dates. It provides the variance between the Baseline and actual start and finish dates.

- Duration – This section compares the planned and Baseline duration. It provides the actual duration finished and the remaining duration and calculates the percent complete on the project.

- Work Time (Hours) – If a Project Manager is tracking labor hours for a project, this section provides the totals and variance between the planned and Baseline labor hours. It provides the total hours finished and remaining, and calculates the percent complete.

- Task Status – This section provides a count and percentage of the total tasks with each status value (Hold, Assigned, In Process, and Completed).

Manager Cost Report

This report summarizes each project manager's progress. It lists all the projects assigned to each manager, and compares the project budgets with their actual costs. The Manager Cost Report is organized by Project Name, and includes:

- Project Name

- Project Status

- Planned budget

- % of Total Budget

- Actual amount spent to-date

- % of Total Actual

- Planned to Actual Variance

- % Planned to Actual Variance

- Total Budget and Actual values for all the manager's projects combined

- This report is sorted by Project Name (alphabetical), Project Status (ascending), and Budget (descending).

Details Report

This report provides a detailed summary of all tasks and milestones in a project. The Project Details Report is organized by Responsible Organization and includes:

- Responsible Organization and User

- Task Name and status

- If it is on the critical path and slack

- Dependency Relationships

- Plan Start, Plan Finish Dates and Duration

- Actual Start and Finish Dates

- This report has a two-tier sort by Responsible Organization (ascending) and Assigned Worker (ascending).

MANAGEMENT

All Complete Report

This report provides a one-line summary of each completed projects including a comparison of Baseline and actual project plan data. The following information is included:

- Project Manager and Project Name

- Baseline Start Date, Actual Start Date and their variance

- Baseline Finish Date, Actual Finish Date and their variance

- Planned Labor Hours, Total Work Hours and their variance. A sub-total is calculated for each Project Manager and then totaled for all projects.

All In Process Report

This report provides a one-line summary for each APM project with a project status of *In Process*. It includes the following information:

- Project Manager Name and Project Name

- Plan Start Date, Actual Start Date, and Plan Finish Date

- Percent of Calendar Duration Completed

- Percent of Work Time Completed

- The count and percentage of tasks with a status of *Hold*, *Assigned*, *In Process* and *Completed*

- The report has a three-tier sort structure of Project Manager, Plan Start Date and Plan Finish Date all in ascending order.

All Pending Report

This report provides a one-line summary of each project in APM with a status of Pending Approval. These are projects that have suspended planning are waiting for approval. The report includes:

- Project Manager Name and Project Name

- Plan Start and Finish Dates

- The estimated project duration and the time units used for planning

- The total planned labor hours (if estimated), a sub-total for each Project Manager and a total of all projects.

- The data has a three-tier sort structure of Project Manager, Plan Start Date and Plan Finish Date in ascending order.

Manager Cost Report

See Above.

HOURS/TIME

New Project Report

The New Project Report provides a list of all new projects.

Critical Path Report

The Critical Path Report provides a list of all tasks on the critical path of the project. The report includes:

- Task Id, Task Name and Status

- Plan Start, Finish and Revised Finish Dates

- Dependency Relationships

- Responsible Organization and User

- This report has a two-tier sort by Plan Start Date (ascending) and Plan Finish Date (ascending).

Variance Report

The Project Variance Report provides a comparison of the Baseline project plan to actual project results. It includes:

- Task Id, Task Name and Level

- If it is on the critical path and Slack

- Base and Actual Start Dates, and Variance

- Base and Actual Finish Dates, and Variance

- Responsible Organization and User

- This report has a two-tier sort by Base Start Date (ascending) and Base Finish Date (ascending).

Not Finished Report

This report compliments the Should Have Started Report by identifying those tasks that should have been finished by the report date. When used together, these reports can provide valuable insight to the real source of project delays. The report includes:

- Task Id and Task Name

- Task status

- Calculates the amount of time the task is late in starting

- If the task is on the Critical Path and Slack

- Task Duration, Plan Start, Plan Finish and Revised Plan Finish Dates

- Dependency Relationships

- This report is sorted based on the lateness (descending), if the task is critical (descending) and the planned finish of the task (ascending).

Not Started Report

During the Working Phase, this report is an excellent tool to identify exceptions to the project schedule. Based on the report date, it reviews the project schedule to

identify all tasks and milestones that should have started but have not. The following information is included:

- Task Id and Task Name

- Task status

- Calculates the amount of time the task is late in starting

- If the task is on the Critical Path and Slack

- Task Duration, Plan Start, and Plan Finish Dates

- Dependency Relationships

- This report is sorted based on the lateness (descending), if the task is critical (descending) and the planned start of the task (ascending).

WORKLOAD

Group Task Report

This report provides a Responsible Organization manager with a detailed summary of all tasks assigned to the group and staff across all APM projects. It is grouped by User and calculates the total hours assigned to them, as well as a total of hours for the Group.

Because the report includes both planned and actual information, a group manager can quickly see how assignments are balanced across the team and how successful they are in accomplishing their work on schedule. The report includes:

- Assigned Worker

- Project Name and Status

- Task Name and Status

- If the task is on the Critical Path and Slack

- Planned Labor Hours, sub-totals by User, and a total for the Group

- Plan Start and Finish Dates, and Duration

- Actual Start and Finish Dates

- This report has a three-tier sort by Assigned Worker (ascending), the Project (ascending) and the Plan Start Date (ascending).

User Task Report

Similar to the Group Task Report, this provides individual Users with a detailed summary of the tasks assigned to them across all APM projects. The report includes:

- Responsible Organization (User may be a member of more than one Group)

- Project Name and Status

- Task Name and Status

- If the task is on the Critical Path and Slack

- Planned Labor Hours, sub-totals by Group, and a total for the User

- Plan Start and Finish Dates, and Duration

- Actual Start and Finish Dates

- This report has a sort structure of Responsible Organization (ascending), Project Name (ascending), and Plan Start Date (ascending).

Work Time Report

For project planning and tracking labor hours, this report provides a detailed summary of the work time budget. It includes:

- Task Id, Task Name and Status

- Plan Start and Finish Dates

- Planned Labor Hours

- Work Time Logged to date, Estimated Work Time Remaining, and their total

- Responsible Organization and User

- This report has a two-tier sort of Plan Start Date (ascending) and Plan Finish Date (ascending).

Snapshot Report

The Snapshot Report provides a detailed summary of all projects with status *In Process* and *Completed*, by project manager. It includes:

- Information as-of date, name of project manager.

- Warning Variance Threshold and Critical Variance Threshold indicators

- Project Name

- Project Status

- Completed Tasks

- Remaining Tasks

- Total Cost at Completion

Export Report Data

Report data can be exported in a number of standard file formats for use in other data analysis and reporting tools, including PDF, Excel, CSV, Crystal Reports, HTML, etc.

1. Run the report to display the data you need.

2. Click the Report Export icon in the upper left corner of the report window.
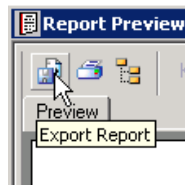
Figure 77 - Report Export Icon

3. Click the Report Export icon in the upper left of the report window. The Export dialog opens.

4. Make your selections from the available dropdown options and click OK. The Select Export File dialog opens.

5. Complete the Select Export File dialog as needed and click OK. Your report data is saved as requested.

Print Report Data

To print a report, click the Print Report icon in the upper left corner.

Pre-defined Query Lists

ActionProgram Manager includes a selection of pre-defined query lists, which can quickly provide a helpful on-screen view of the project plan. Depending upon the query list selected, it outlines the level of the task record, whether it is a task or milestone, it's current status of the task, the plan start and finish dates, the summary task name (if there is one), and the predecessor task (if there is one). From the query list, any of the task records can be opened and viewed on the screen.

There are seven pre-defined query lists in ActionProgram Manager, which can be initiated from the project record or any task record in a project plan. They are:

- List Entire Project –All task, summary task and milestone records in the project plan.

- List Tasks – All task records in the project plan.

- List Summary Tasks – All summary task records in the project plan.

- List Milestones – All milestone records in the project plan.

- List Critical Path – All critical path task records in the project plan.

- List All Completed – All task and milestone records with a status of *Complete*.

- List All Not Completed – All task and milestone records with a status of *Hold, Assigned* or *In Process*.

To View a Query List

1. Open the project record or any related task record.

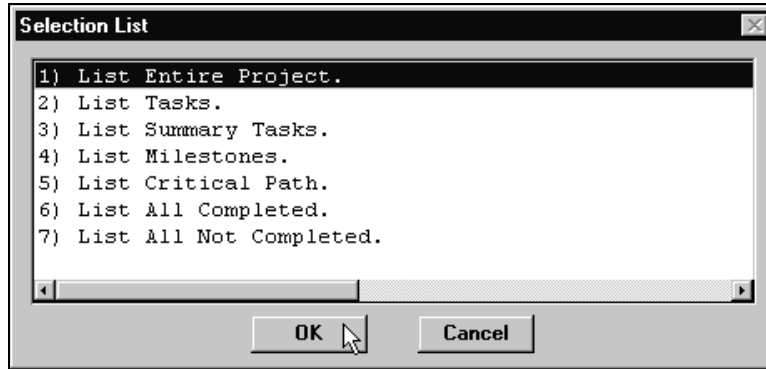2. Click on the List Tasks/Milestones button on the form. A selection list (Figure 78) will be displayed:

Figure 78 - List All Tasks/Milestones Selection List

3. Select an option from the list and click OK. The APM:Tasks form opens, displaying all of the project's tasks and milestones in a list at the top of the form.

Figure 79 - List Entire Project

TIP: Any individual record can be opened by selecting it and double-clicking with the mouse. Or select Query > Modify Individual, or Ctrl+M.

Part VIII:
Managing Resources

Keeping track of project resources is a major task for management. APM makes it easier by putting this information at your fingertips with a set of easy-to-use resource charts.

View Resources

1. From the APM:Navigation form select Charts > Resources > Active Project. The APM:Resources dialog box opens.
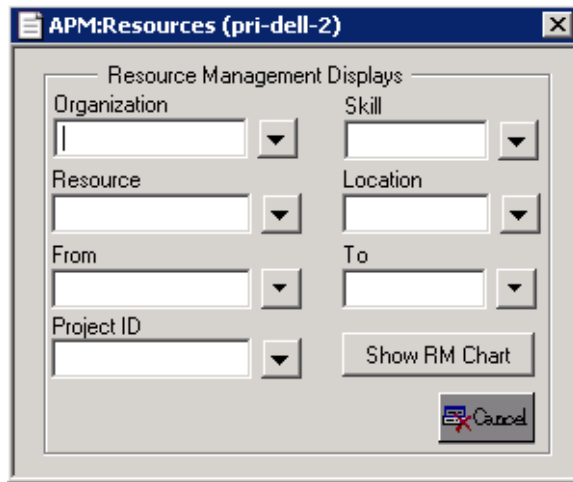

Figure 80 - Active Project Report Dialog

2. Select the resource parameters from the report dialog and click Show RM Chart.

   The APM:Inventory form opens displaying all resources in the system in the Resource Management chart.
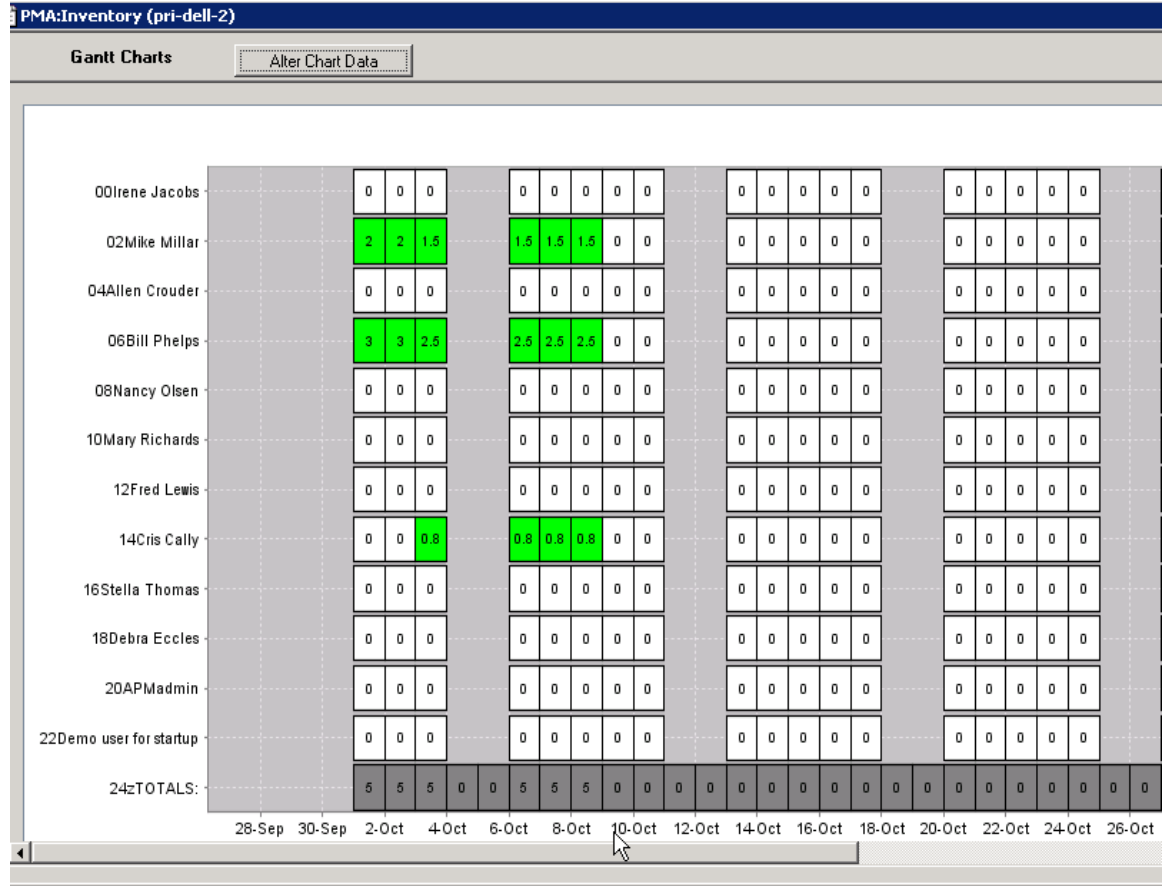
Figure 81 - Resource Management Chart

3. Place your cursor over a date, and a dropdown box shows the tasks that make up the hours on that date.
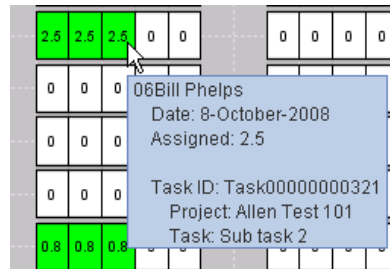

Figure 82 - Mouse Over a Resource to View Details

4. To change the data displayed, click the Alter Chart Data button.

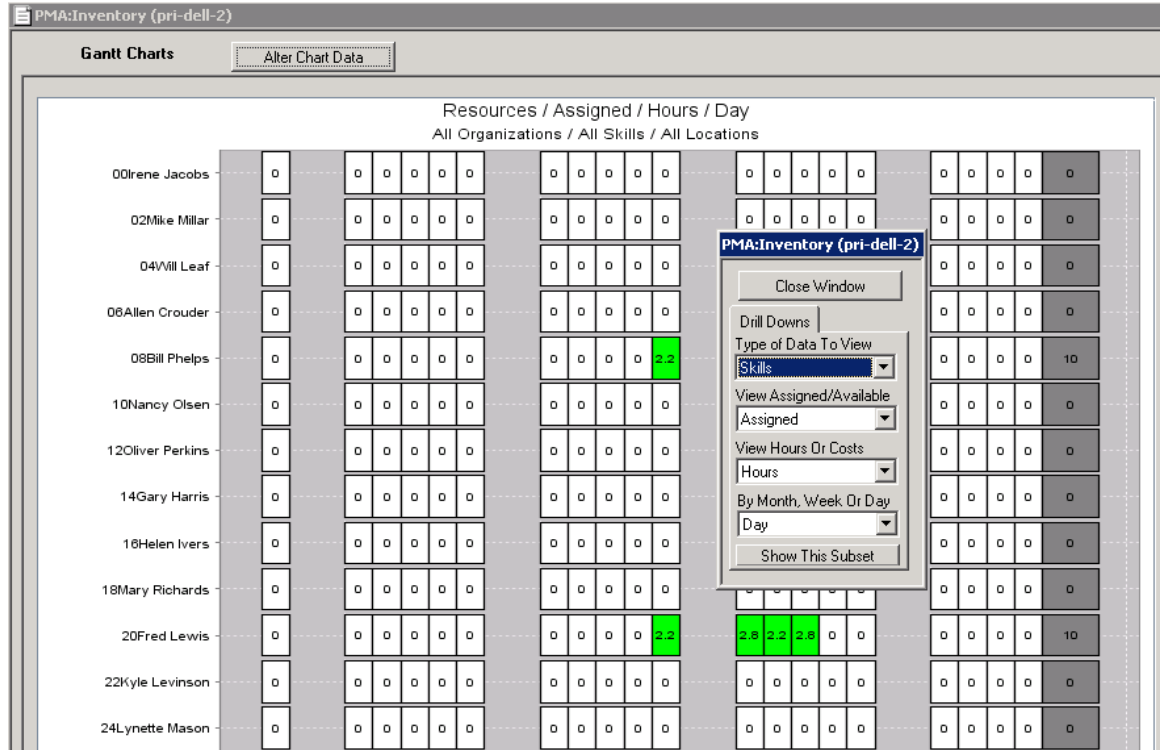   The PMA:Inventory chart variables dialog box opens.

Figure 83 - Alter Chart Data Dialog

5. Use this dialog to change the type of data you wish to view. Make your changes and click the Show This Subset button. The chart refreshes and displays the new data set.

Appendix A:
Charts & Reports

This section contains examples of all of the charts and reports available in APM:

- Gantt Chart

- Resource Management Chart

- Project Summary Report

- Manager Cost Report

- Project Details Report

- All Complete Report

- All In Process Report

- Group Task Assignment Report

- User Task Report

- Worktime Report

- Snapshot Report

- Should Have Started Report

- Should Have Finished Report

- Project Variance Report

- Worker Weekly Time Report

- Project Time Report

- Sick/Vacation Time Used Report
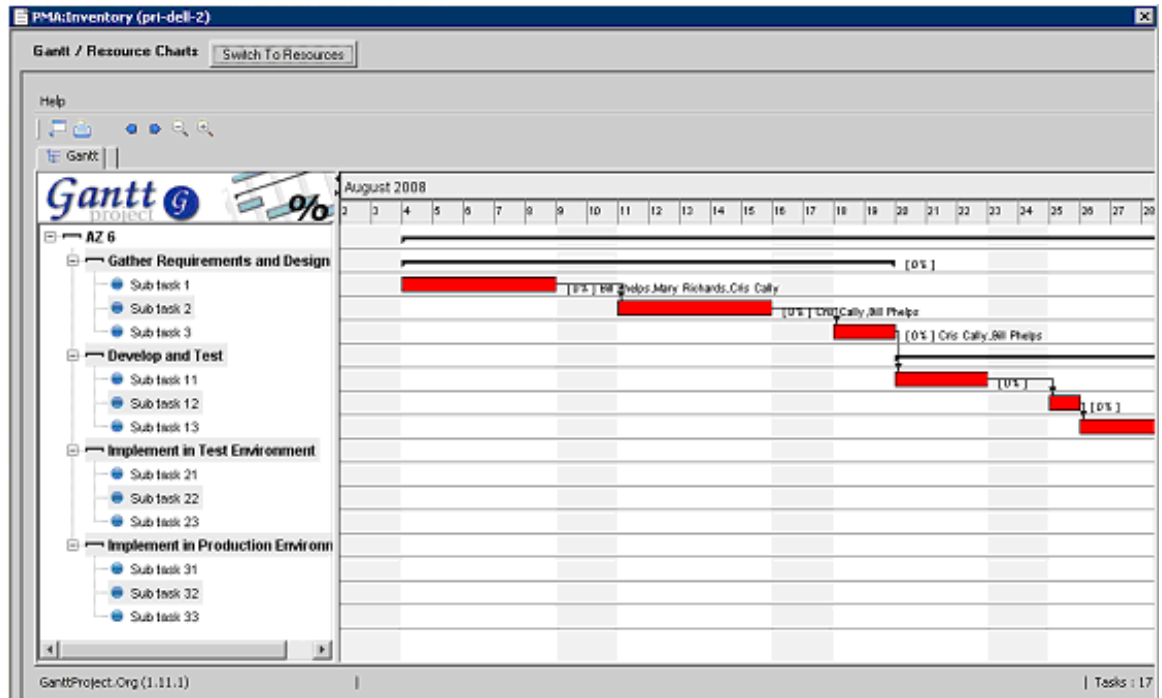
- Close Out Time Report

Gantt Chart

Figure 84 - Gantt Chart

If you click on the magnifying glass with the minus sign several times, it condenses the chart onto one page, making it easy for you to view the entire project at a glance:
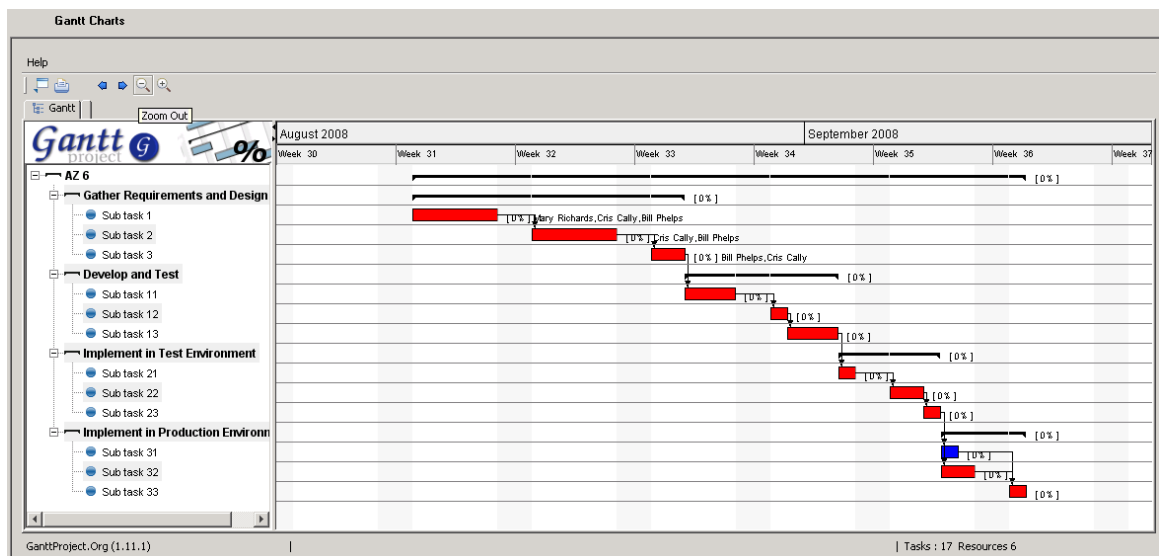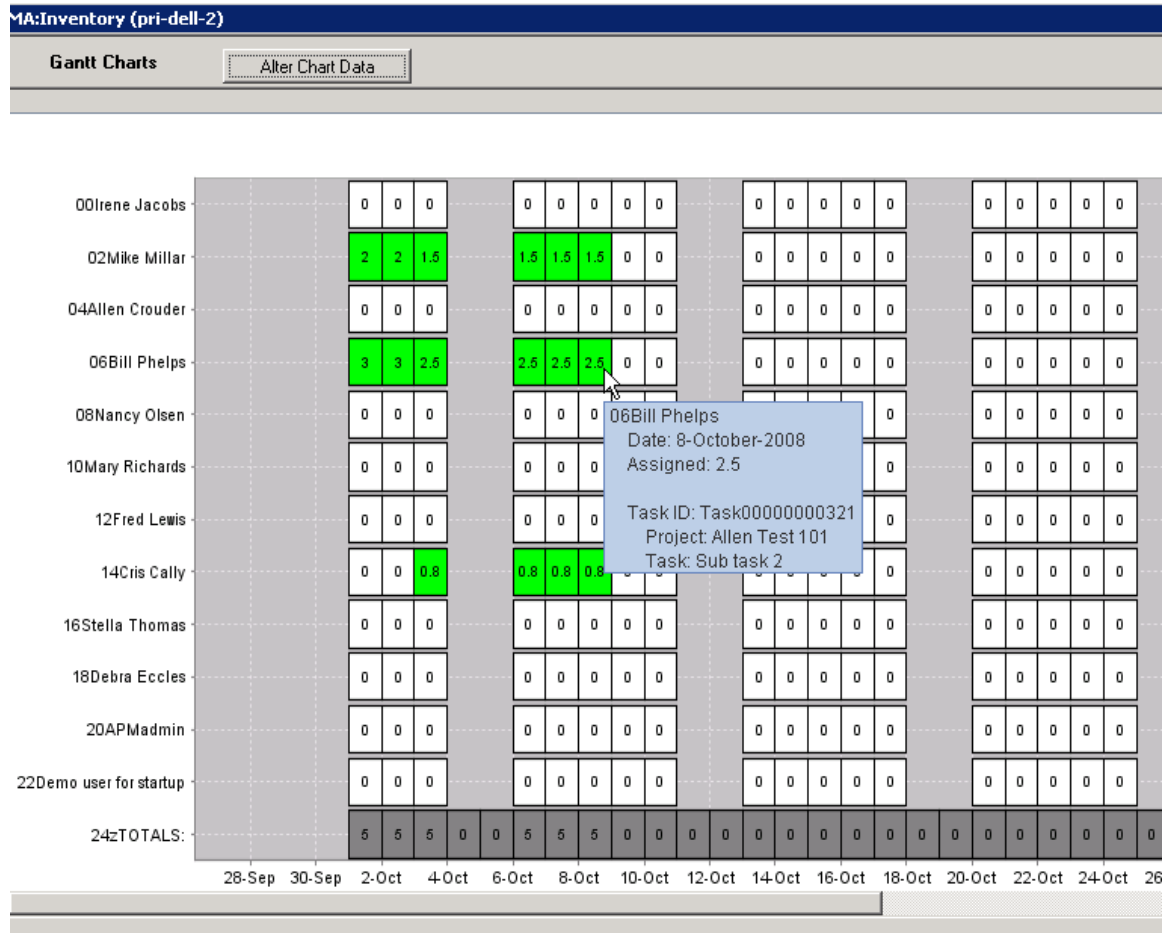

Figure 85 - Gantt Chart Condensed

Resource Management Chart

Project Summary Report

Manager Cost Report

Budget vs. Actual by Manager

Information as of:	10/15/2008
Project Status:	In Process & Completed
Project Manager:	Allen Crouder
Total Budget:	$410,275.00
Total Actual:	$25,147.86

Project Name	Project Status	Planned	% of Total Budget	Actual	% of Total Actual	Planned to Actual Variance	% Planned to Actual Variance
Allen Test 102	In Process	$53,100.00	12.94%	$2,400.00	9.54%	$50,700.00	95.48%
Allen Test 103	In Process	$53,100.00	12.94%	$1,400.00	5.57%	$51,700.00	97.36%
Allen Test 201	In Process	$53,100.00	12.94%	$2,400.00	9.54%	$50,700.00	95.48%
AZ 6	In Process	$52,150.00	12.71%	$2,547.86	10.13%	$49,602.14	95.11%
AZ 3	In Process	$51,450.00	12.54%	$3,600.00	14.32%	$47,850.00	93.00%
Stan test 33	In Process	$49,700.00	12.11%	$7,400.00	29.43%	$42,300.00	85.11%
Stan test 34	In Process	$48,950.00	11.93%	$1,600.00	6.36%	$47,350.00	96.73%
Allen Test 101	In Process	$48,725.00	11.88%	$3,800.00	15.11%	$44,925.00	92.20%
Total In Process		**$410,275.00**	100.00 %	**$25,147.86**	100.00 %	**$385,127.14**	**93.87 %**

Project Details Report

Project Details Report

Information as of:	10/13/2008
Project Id:	Proj00000000024
Project Name:	AZ 6
Project Manager:	Allen Crouder
Project Status:	In Process
Project Time Unit:	Days
Project Schedule Orientation:	Project Start Date

Group Association WBS	Responsible Party	Task Name	Task Status	Critical Path	Slack	Predecessor	Planned Labor Hours	Actual Labor Hours	Plan Start Date Plan Finish Date	Duration Time Units	Actual Start Date Actual Finish Date	Planned Cost	Actual Cost
Finance	Mary Richards	Gather Requirements and Design	In Process	Y	0.00				8/4/2008 8:00:00 AM 8/19/2008 5:00:00 PM	12.00 D	10/12/2008 2:17:11P		
Finance	Mary Richards	Sub task 1	In Process	Y	0.00		20.00	11.00	8/4/2008 8:00:00 AM 8/8/2008 5:00:00 PM	5.00 D	10/12/2008 2:17:11P	4,375.00	2,547.86
Finance	Mary Richards	Sub task 2	Hold	Y	0.00		20.00	0.00	8/11/2008 8:00:00 AM 8/15/2008 5:00:00 PM	5.00 D		4,375.00	0.00
Finance	Mary Richards	Sub task 3	Hold	Y	0.00		16.00	0.00	8/18/2008 8:00:00 AM 8/19/2008 5:00:00 PM	2.00 D		3,800.00	0.00
Finance	Mary Richards	Develop and Test	Hold	Y	0.00				8/20/2008 8:00:00 AM 8/28/2008 5:00:00 PM	7.00 D			
Finance	Mary Richards	Sub task 11	Hold	Y	0.00		10.00	0.00	8/20/2008 8:00:00 AM 8/22/2008 5:00:00 PM	3.00 D		4,500.00	0.00
Finance	Mary Richards	Sub task 12	Hold	Y	0.00		10.00	0.00	8/25/2008 8:00:00 AM 8/25/2008 5:00:00 PM	1.00 D		4,500.00	0.00
Finance	Mary Richards	Sub task 13	Hold	Y	0.00		10.00	0.00	8/26/2008 8:00:00 AM 8/28/2008 5:00:00 PM	3.00 D		4,500.00	0.00
Finance	Mary Richards	Implement in Test Environment	Hold	Y	0.00				8/29/2008 8:00:00 AM 9/3/2008 5:00:00 PM	4.00 D			
Finance	Mary Richards	Sub task 21	Hold	Y	0.00		10.00	0.00	8/29/2008 8:00:00 AM 8/29/2008 5:00:00 PM	1.00 D		4,500.00	0.00
Finance	Mary Richards	Sub task 22	Hold	Y	0.00		10.00	0.00	9/1/2008 8:00:00 AM 9/2/2008 5:00:00 PM	2.00 D		4,500.00	0.00
Finance	Mary Richards	Sub task 23	Hold	Y	0.00		8.00	0.00	9/3/2008 8:00:00 AM 9/3/2008 5:00:00 PM	1.00 D		3,600.00	0.00
Finance	Mary Richards	Implement in Production Environment	Hold	Y	0.00				9/4/2008 8:00:00 AM 9/8/2008 5:00:00 PM	3.00 D			

All Complete Report

Summary Report

All Projects Completed

Information as of: 10/15/200
Project Status: Completed

Project Manager	Project Name	Baseline Start Date	Actual Start Date	Start Variance	Baseline Finish Date	Actual Finish Date	Finish Variance	Planned Labor Hours	Work Time Logged	Work Variance
Demo user for st	Stan Test 6	4/1/2008 9:00:00AM	3/19/2008 2:20:11PM	-12.78	5/1/2008 6:00:00PM	4/25/2008 4:52:47PM	-6.05	121.00	172.00	-51.00
Demo user for st	Remedy Implementation	4/28/2008 9:00:00AM	4/28/2008 1:23:08PM	0.18	5/22/2008 6:00:00PM	5/28/2008 2:00:17PM	5.83	116.00	0.00	116.00
							sub-total	237.00	172.00	65.00
							Total	237.00	172.00	65.00

All In Process Report

Summary Report

All Projects In Process

Information as of: 10/15/200
Project Status: In Process

Project_Manager	Project_Name	Plan Start Date	Actual Start Date	Plan Finish Date	% Calendar Complete	% Work Time Complete	Hold #	Hold %	Assigned #	Assigned %	In Process #	In Process %	Complete #	Complete %
Allen Crouder	Stan test 33	7/28/2008 9:00:00AM	7/22/2008 1:37:33PM	8/27/2008 9:00:00AM	100%	33%	9	56.25	1	6.25	1	6.25	5	31.25
Allen Crouder	AZ 6	8/4/2008 8:00:00AM	10/12/2008 1:04:33PM	9/8/2008 5:00:00PM	100%	8%	14	87.50	0	0.00	2	12.50	0	0.00
Allen Crouder	AZ 3	8/4/2008 9:00:00AM	7/28/2008 6:55:27PM	8/28/2008 6:00:00PM	100%	15%	13	81.25	1	6.25	1	6.25	1	6.25
Allen Crouder	Stan test 34	9/1/2008 8:00:00AM	8/25/2008 4:13:14PM	9/29/2008 5:00:00PM	100%	7%	14	87.50	0	0.00	2	12.50	0	0.00
Allen Crouder	Allen Test 101	10/1/2008 8:00:00AM	8/5/2008 12:00:17PM	10/29/2008 5:00:00PM	48%	14%	13	76.47	0	0.00	3	17.65	1	5.88
Allen Crouder	Allen Test 102	10/1/2008 8:00:00AM	8/6/2008 5:08:13PM	10/29/2008 5:00:00PM	48%	10%	13	76.47	2	11.76	1	5.88	1	5.88
Allen Crouder	Allen Test 103	10/1/2008 8:00:00AM	8/6/2008 5:37:19PM	10/29/2008 5:00:00PM	48%	6%	15	88.24	0	0.00	2	11.76	0	0.00
Allen Crouder	Allen Test 201	10/1/2008 8:00:00AM	8/14/2008 6:29:14PM	10/29/2008 5:00:00PM	48%	10%	13	76.47	2	11.76	1	5.88	1	5.88
Demo user for startup	Allen's Test 1	3/3/2008 9:00:00AM	3/3/2008 12:34:11PM	3/14/2008 9:00:00AM	100%	0%	2	50.00	1	25.00	0	0.00	1	25.00
Demo user for startup	Allen's Test 3	3/17/2008 9:00:00AM	3/12/2008 12:56:23PM	4/10/2008 6:00:00PM	100%	0%	13	76.47	1	5.88	2	11.76	1	5.88
Demo user for startup	Stan Test 5	3/17/2008 9:00:00AM	3/10/2008 5:17:34PM	4/17/2008 6:00:00PM	100%	29%	13	76.47	0	0.00	2	11.76	2	11.76
Demo user for startup	Stan test 9	3/31/2008 9:00:00AM	3/27/2008 9:35:28AM	4/11/2008 6:00:00PM	100%	46%	1	33.33	1	33.33	0	0.00	1	33.33
Demo user for startup	Stan test 4	4/1/2008 9:00:00AM	3/1/2008 1:26:25PM	5/1/2008 6:00:00PM	100%	13%	13	76.47	2	11.76	1	5.88	1	5.88
Demo user for startup	Remedy Implementation 2	4/29/2008 9:00:00AM	4/29/2008 6:22:48PM	5/23/2008 6:00:00PM	100%	0%	8	50.00	1	6.25	1	6.25	6	37.50
Demo user for startup	Remedy Implementation 3	4/30/2008 9:00:00AM	4/30/2008 10:29:02AM	5/26/2008 6:00:00PM	100%	0%	5	31.25	1	6.25	1	6.25	9	56.25
Demo user for startup	Stan test 8	6/30/2008 9:00:00AM	3/25/2008 3:48:07PM	7/31/2008 6:00:00PM	100%	13%	13	76.47	2	11.76	1	5.88	1	5.88

All Projects In Process   10/15/2008   Page 1 of 1

Group Task Assignment Report

Group Task Assignment Report

| **Information as of:** | 10/15/200 |
| **Group Association:** | Network Operations |

Responsible Party	Project Name	Project Status	Task Name	Task Status	Critical	Slack	Planned Labor Hours	Plan Start Date	Plan Finish Date	Plan Duration	Time Units	Actual Start Date	Actual Finish Date
Aaron Baker	Allen's Test 5	Plan	Task 1	Hold	N	2.00	0.00	3/27/2008 9:00:00	3/27/2008 6:00:00	1.00	Days		
Aaron Baker	Allen's Test 5	Plan	Task 2	Hold	N	1.00	0.00	3/27/2008 9:00:00	3/28/2008 6:00:00	2.00	Days		
Aaron Baker	Allen's Test 5	Plan	Task 3	Hold	Y	0.00	0.00	3/27/2008 9:00:00	3/31/2008 6:00:00	3.00	Days		
Aaron Baker	Allen's Test 6	Plan	Task 1	Hold	N	1.00	0.00	3/27/2008 9:00:00	3/27/2008 6:00:00	1.00	Days		
Aaron Baker	Allen's Test 6	Plan	Task 2	Hold	Y	0.00	0.00	3/27/2008 9:00:00	3/28/2008 6:00:00	2.00	Days		
Aaron Baker	OCTO 1	Plan	Summary task 1	Hold	Y	0.00	0.00	10/13/2008 8:00:00	10/15/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	2.	Hold	Y	0.00	0.00	10/13/2008 8:00:00	10/13/2008 5:00:00	1.00	Days		
Aaron Baker	OCTO 1	Plan	3.	Hold	Y	0.00	0.00	10/14/2008 8:00:00	10/15/2008 5:00:00	2.00	Days		
Aaron Baker	OCTO 1	Plan	4.	Hold	N	0.00	0.00	10/15/2008 5:00:00	10/15/2008 5:00:00	0.00	Days		
Aaron Baker	OCTO 1	Plan	Summary task 5	Hold	Y	0.00	0.00	10/16/2008 8:00:00	10/28/2008 5:00:00	9.00	Days		
Aaron Baker	OCTO 1	Plan	6.	Hold	Y	0.00	0.00	10/16/2008 8:00:00	10/20/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	7.	Hold	Y	0.00	0.00	10/21/2008 8:00:00	10/23/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	8	Hold	Y	0.00	0.00	10/24/2008 8:00:00	10/28/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	9.	Hold	N	0.00	0.00	10/28/2008 5:00:00	10/28/2008 5:00:00	0.00	Days		
Aaron Baker	OCTO 1	Plan	Summary task 10	Hold	Y	0.00	0.00	10/29/2008 8:00:00	10/31/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	11.	Hold	Y	0.00	0.00	10/29/2008 8:00:00	10/31/2008 5:00:00	3.00	Days		
Aaron Baker	OCTO 1	Plan	12	Hold	N	0.00	0.00	10/31/2008 5:00:00	10/31/2008 5:00:00	0.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	1 Remove Users	Hold	N	29.00	0.00	8/20/2008 8:00:00	10/6/2008 5:00:00	5.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	21 OCTO cluster clean up	Hold	N	29.00	0.00	8/20/2008 8:00:00	10/6/2008 5:00:00	5.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	2 Check if the users are active	Hold	N	29.00	0.00	8/20/2008 8:00:00	8/26/2008 5:00:00	5.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	3 Clean up duplicate users	Hold	N	29.00	0.00	8/20/2008 8:00:00	8/26/2008 5:00:00	5.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	22 Run a report for all users in the OCTO cluster	Hold	N	33.00	0.00	8/20/2008 8:00:00	8/20/2008 5:00:00	1.00	Days		
Aaron Baker	OCTO Agency/ Cluster Department and People Clean up	Plan	23 Verify if the emails for the non support users in the OCTO cluster are active	Hold	N	32.00	0.00	8/20/2008 8:00:00	8/21/2008 5:00:00	2.00	Days		

User Task Report

User Task Assignment Report

Information as of:	10/15/200	
Responsible Party:	Allen	

Group Association	Project Name	Project Status	Task Name	Task Status	Critical	Slack	Planned Labor Hours	Planned Start Date	Planned Finish Date	Planned Duration	Time Units	Actual Start Date	Actual Finish Date
Engineering	Remedy Implementation 2	In Process	Sub task 13	Assigned	Y	0.00	10.00	5/12/2008 9:00:00A	5/14/2008 6:00:00I	3.00	Days		

Worktime Report

Summary Report

Work Time by Task

Information as of:	10/15/2008	
Project Id:	Proj00000000024	
Project Name:	AZ 6	
Project Manager:	Allen Crouder	
Project Status:	In Process	
Project Time Unit:	Days	
Project Schedule Orientation	Project Start Date	

Line Item	Task Id	Task Name	Status	Plan Start Plan Finish	Planned Labor Hrs	Hours Finished	Estimated Time Remaining	Total Finished & Est. Time	Group Association	Responsible Party
1	Task00000000003	Gather Requirements and Design	In Process	8/4/2008 8:00:00AM 8/19/2008 5:00:00PM	56.00	11.00	45.00	56.00	Finance	Mary Richards
2	Task00000000007	Develop and Test	Hold	8/20/2008 8:00:00AM 8/28/2008 5:00:00PM	30.00	0.00	30.00	30.00	Finance	Mary Richards
3	Task00000000011	Implement in Test Environment	Hold	8/29/2008 8:00:00AM 9/3/2008 5:00:00PM	28.00	0.00	28.00	28.00	Finance	Mary Richards
4	Task00000000015	Implement in Production Environment	Hold	9/4/2008 8:00:00AM 9/8/2008 5:00:00PM	30.00	0.00	30.00	30.00	Finance	Mary Richards
Sub-Tasks for:	Gather Requirements and Design									
5	Task00000000004	Sub task 1	In Process	8/4/2008 8:00:00AM 8/8/2008 5:00:00PM	20.00	11.00	9.00	20.00	Finance	Mary Richards
6	Task00000000005	Sub task 2	Hold	8/11/2008 8:00:00AM 8/13/2008 5:00:00PM	20.00	0.00	20.00	20.00	Finance	Mary Richards
7	Task00000000006	Sub task 3	Hold	8/18/2008 8:00:00AM 8/19/2008 5:00:00PM	16.00	0.00	16.00	16.00	Finance	Mary Richards
Sub-Tasks for:	Develop and Test									
8	Task00000000008	Sub task 11	Hold	8/21/2008 8:00:00AM 8/22/2008 5:00:00PM	10.00	0.00	10.00	10.00	Finance	Mary Richards
9	Task00000000009	Sub task 12	Hold	8/25/2008 8:00:00AM 8/25/2008 5:00:00PM	10.00	0.00	10.00	10.00	Finance	Mary Richards
10	Task00000000010	Sub task 13	Hold	8/26/2008 8:00:00AM 8/28/2008 5:00:00PM	10.00	0.00	10.00	10.00	Finance	Mary Richards
Sub-Tasks for:	Implement in Test Environment									
11	Task00000000012	Sub task 21	Hold	8/29/2008 8:00:00AM 8/29/2008 5:00:00PM	10.00	0.00	10.00	10.00	Finance	Mary Richards
12	Task00000000013	Sub task 22	Hold	9/1/2008 8:00:00AM 9/3/2008 5:00:00PM	10.00	0.00	10.00	10.00	Finance	Mary Richards

Snapshot Report

Snapshot

Information as of:	10/15/2008
Project Status:	In Process & Completed
Project Manager:	Allen Crouder
Warning Variance Threshold:	-10.00%
Critical Variance Threshold:	-20.00%

Project Name	Project Status	Completed Tasks	Remaining Tasks	Total Cost at Completion
Allen Test 101	In Process			
Actual + Plan		$2,400.00	$46,925.00	$49,325.00
Baseline		$1,800.00	$54,900.00	$56,700.00
Variance		-$600.00	$7,975.00	$7,375.00
% Variance		(33.3)%	14.5%	13.0%
Allen Test 102	In Process			
Actual + Plan		$2,400.00	$54,900.00	$57,300.00
Baseline		$1,800.00	$54,900.00	$56,700.00
Variance		-$600.00	$0.00	-$600.00
% Variance		(33.3)%	0.0%	(1.1)%
Allen Test 103	In Process			
Actual + Plan		$0.00	$56,700.00	$56,700.00
Baseline		$0.00	$56,700.00	$56,700.00
Variance		$0.00	$0.00	$0.00
% Variance		0.0%	0.0%	0.0%
Allen Test 201	In Process			
Actual + Plan		$2,400.00	$54,900.00	$57,300.00
Baseline		$1,800.00	$54,900.00	$56,700.00
Variance		-$600.00	$0.00	-$600.00
% Variance		(33.3)%	0.0%	(1.1)%
AZ 3	In Process			
Actual + Plan		$3,600.00	$47,700.00	$51,300.00
Baseline		$3,750.00	$47,700.00	$51,450.00
Variance		$150.00	$0.00	$150.00
% Variance		4.0%	0.0%	0.3%
AZ 6	In Process			
Actual + Plan		$0.00	$52,150.00	$52,150.00
Baseline		$0.00	$52,150.00	$52,150.00
Variance		$0.00	$0.00	$0.00
% Variance		0.0%	0.0%	0.0%
Stan test 33	In Process			
Actual + Plan		$7,400.00	$35,100.00	$42,500.00
Baseline		$15,850.00	$35,100.00	$50,950.00
Variance		$8,450.00	$0.00	$8,450.00
% Variance		53.3%	0.0%	16.6%

Should Have Started Report

Should Have Finished Report

Project Variance Report

Worker Weekly Time Report

Project Time Report

Sick / Vacation Time Used Report

Sick / Vacation Time Used Report

| Worker: | allen | | | Date from: | 12/31/01 |
| Department: | Engineering | | | Date to: | 1/11/02 |

Task	Charge Code	Work Description	Date Worked	Reg Hours	OT Hours	Total Hours
Vacation Time	50010	Personal Vacation Time	1/3/02	8.00	0.00	8.00
		Personal Vacation Time	1/4/02	8.00	0.00	8.00
		Personal Vacation Time	1/7/02	8.00	0.00	8.00
		Personal Vacation Time	1/8/02	8.00	0.00	8.00
		Personal Vacation Time	1/9/02	8.00	0.00	8.00
		Personal Vacation Time	1/10/02	8.00	0.00	8.00
		Personal Vacation Time	1/11/02	8.00	0.00	8.00
			Sub Total:	56.00	0.00	56.00
Floating Holiday	50011	Personal Holiday	12/31/01	8.00	0.00	8.00
		Personal Holiday	1/2/02	8.00	0.00	8.00
			Sub Total:	16.00	0.00	16.00
Holiday	50020	Company Holiday	1/1/02	8.00	0.00	8.00
			Sub Total:	8.00	0.00	8.00
			Total:	80.00	0.00	80.00

| Project Remedies, Inc. Confidential | | Sick / Vacation Time Used Report | | 5/7/02 | Page 1 |

Close Out Time Report

| | | | 1 of 1 | | | | | | | 100% | | Total:13 | 100% | 13 of 13 |

Close Out Time

Time ID	Date Worked	Task Name	Work Description		Reg Hours	Overtime	Total Hours
User : Allen							
TIME00000000402	02/02/04	Sub-task 12	Development.		8.00		8.00
TIME00000000403	02/03/04	Sub-task 12	Development.		8.00		8.00
TIME00000000412	02/03/04	Move My Office:MovePhone			1.00	0.00	1.00
TIME0000000404	02/04/04	Cannot connect remotely	Testing.		0.00	0.00	0.00
TIME00000000407	02/04/04	Move My Office:Verify Office Confi	Got VP Approval.		1.00		1.00
TIME00000000413	02/04/04	Move My Office:MovePhone			1.00	0.00	1.00
TIME00000000405	02/05/04	Cannot connect remotely	Testing		2.00	0.00	2.00
TIME00000000408	02/05/04	Move My Office:Verify Office Confi			1.00	0.00	1.00
TIME00000000414	02/05/04	Move My Office:MovePhone			1.00	0.00	1.00
TIME00000000406	02/06/04	Cannot connect remotely			1.00	0.00	1.00
TIME00000000409	02/06/04	Move My Office:Verify Office Confi			1.00	0.00	1.00
TIME00000000410	02/06/04	Move My Office:Verify Office Confi	Verified configuration.		2.00	0.00	2.00
TIME00000000411	02/06/04	Move My Office:MovePhone	Development.		1.00		1.00
				Total :	**28.00**	**0.00**	**28.00**
				Grand Total :	**28.00**	**0.00**	**28.00**

Appendix B:
APM Forms Reference

Tasks are performed in ActionProgram Manager using a number of different forms, which are available depending on the project's status and the user's permission levels.

The AR System administrator determines which forms and fields available to users by Role. For example, an Assigned Worker may be able to view project tasks, log time against a task, or even submit a change request, but only the Project Manager may create a new task.

This section describes the main forms and fields specific to ActionProgram Manager that are available to most users. Some fields in are common to any AR System form and are not covered by this manual. For more information about standard items or common definitions of AR system, see the AR System User's Guide and/or Administrator's Guide for the Action Request System. For more information about permission and access for Users, contact the AR System administrator.

- APM:Projects Form
  Used to create and modify a project record.

- APM:Tasks Form
  Used to create and modify task, summary task, and milestone records.

- APM:TaskDependency Form
  Used to define task dependency relationships between task, summary task and milestone records.

- APM:Resources Form
  Used to view project resources.

- APM:Approval Tasks Form
  Used to review the project plan approval process.

- PRI:Time & Expense Tracking Form
  Used to enter work time and expenses against a task record.

- APM_Time Approval Form

  Used to review and approve or reject work time and expenses.

- APM:Risk Management Form

  Used to define inter-project dependency relationships.

- Three Important Background Forms

Common APM Form Features

The following features are available on many of the APM forms:

Label	APM: Projects Form Details
Form Icon Buttons	
Selection List Down Arrow	Button on the form Click the down arrow buttons to open a dropdown selection list, or open a separate Selection List window, presenting possible values for the field.
Display Field Contents	Button on the form Displays the complete contents of the field.
Diary Empty	Button on the form Blank diary indicates there are no diary entries.
Diary Entries	Button on the form Lines of "text" on the icon button indicate there are diary entries. To view them, click the diary button.

APM:Projects Form

Use the Projects form to create and modify project records.

Figure 86 - New APM:Projects Form

APM:Projects Form Toolbar
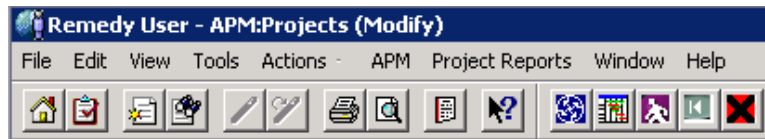
Figure 87 - AR System and APM Project Record Toolbar
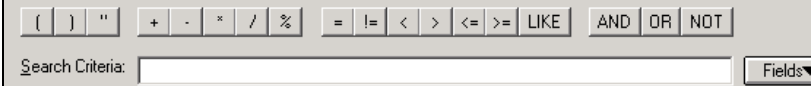
The first buttons on the toolbar belong to Remedy. The APM Projects Toolbar buttons are described below:

Label	APM: Projects Form Toolbar Details
APM:Projects Form – Toolbar Buttons	
Reports [icon]	AR System Button on toolbar Opens the APM:Projects Report Styles form.
What's This? [icon]	AR System Button on toolbar Click this to change the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed. Re-click the What's This? button to toggle out of dynamic help mode.
About PRI [icon]	Button on toolbar Displays an information box about Project Remedies, Inc.
Gantt Chart [icon]	Button on toolbar Initiates a Gantt chart for the active project record.
List Related Approval Records [icon]	Button on toolbar Opens the Matching APM:ApprovalTasks form, which displays the approval process information for the displayed project.
My Last Submitted Project [icon]	Button on toolbar Opens the last submitted project record based upon the User Login Id.
Cancel Project [icon]	Button on toolbar Opens a dialog asking whether you really wish to cancel the project. Click Yes or No.

APM:Projects Form Features

The buttons and fields on this form are described in detail below. They are listed in approximately the same order as they appear on the form.

Label	APM:Projects Form Details
APM:Projects Form Buttons	
Search	Button on the form. Visible when form is in Search state. Use to execute search for active projects.
Advanced	Button on the form. Visible when form is in Search state. Use to reveal Boolean operators for executing complex searches.
Save	Button on the form. Visible when form is in Modify state. Use to save changes to project record.
Recalc	Button on the form Enabled only for approved Plans. Recalculates the Plan when changes have been made that affect project duration.
Refresh	Button on the form Refreshes the active project record.
Select Approval Process	Button on the form New APM:Projects. Opens the New Process Selection List. Approving the plan is usually a multi-step process, where various managers and stake holders approve (or reject) the project plan before it starts. The approval processes are defined by the APM Administrator. Two approval processes, Technical and Corporate, are provided with each APM installation, but you may define as many as you wish.
Show Approval Tasks	Button on the form Available when the project status is *Pending Approval*. Opens the Modify APM:Approval Tasks form, which allows mangers to approve or reject project plans.

Label	APM:Projects Form Details
Reselect Approval	Button on the form Hidden unless the User Id has Approver permission, the project status is *Plan*, and an approval process has been selected. Opens the Selection List of approval processes so a new selection may be made.
Add Contact	Button on the form Opens the New APM:Contact Info form, for adding a new contact. Available to all users.
List Contact	Button on the form Opens the Modify APM:Contact Info form for viewing of modifying contact information. Available to all users.
Execute Approval	Button on the form Hidden unless the User Id has Approver permission. When the project plan is ready for approval, the project manager clicks this button to launch the approval process. When all of the approval process tasks have been reviewed and approved, the project status changes from *Plan* or *Pending Approval* to *Approved* and the Show Approval Tasks button is replaced with the Reselect Approval and Execute Project buttons.
Execute Project	Button on the form Hidden unless the User Id has Approver permission. This is one of the most critical steps in the life of the project. After the plan is executed, it sits in a dormant state, where no changes are allowed, until the project manager decides to execute the plan and launch the project into the working phase. When the Project Manager clicks on the Execute Project button, the Plan is saved as the Baseline Plan. The Baseline Plan is a snapshot of the project plan at that moment, and does not change. The project status changes to *In -Process*, and task notifications are sent.
Gantt Chart	Button on the form Available after a task has been created in the project Displays the Gantt Chart for the active project.
Create Task	Button on the form Available only for existing project records. Opens a New APM:Tasks form for creating a new task. Automatically sets the Project ID, Project Name, Project Status, Project Manager, Identifier, Status, Plan Start Date, and Responsible Organization fields.

Label	APM:Projects Form Details
Create Milestone	Button on the form
	Available only for existing project records.
	Opens a New APM:Tasks form for creating a new milestone. Automatically sets the Project ID, Project Name, Project Status, Project Manager, Identifier, Status, Plan Start Date, and Responsible Organization fields.
List Tasks/Milestones	Button on the form
	Available only for existing project records.
	Opens a Selection List of queries for the project tasks and milestones. Select from: List Entire Project; List Tasks; List Summary Tasks; List Milestones; List Critical Path; List All Completed; and List All Not Completed.
Use a Template	Button on the form
	Available only for new projects.
	Opens the list of project templates from which to select.
Clear Template	Button on the form
	Available only for existing project records that use a template.
	Clears the template from the project.
APM:Projects Form Fields	
Project Id	System generated, read only
	Date Type: Character
	Unique identifier assigned to the project record
Project Name	**Required**
	Data Type: Character with menu list
	The name of the project. When creating a new project, the name must be unique from all other projects to avoid confusion.
Category	Optional
	Data Type: Character with menu list
	A selection list used to categorize the project. Identifies the category or type of project based upon internal business rules. This field can be used to group projects based on business practices within the company. A generic list is included with the application. The AR System administrator manages menu list for this field.
Priority	Optional
	Data Type: Selection dropdown list
	Displays the priority of the project: Emergency, Standard, and Low.

Label	APM:Projects Form Details
Service Type	Optional Data Type: Character with menu list Use to categorize the project according to your own criteria, for your own reporting purposes.
Project Type	Optional Data Type: Character with menu list Use to categorize the project according to your own criteria, for your own reporting purposes.
Description	**Required** Data Type: Character A brief description of the project.
Project Details	Optional Data Type: Diary field A diary log for the project during all phases, which is used to enter text comments about the project. Notes entered are stored chronologically with a date/time stamp and User Login Id. Each status change of the project record is logged in this field automatically. In addition, all entries made to the Task Details field on the Tasks form, are rolled up into this field.
Sponsor/Stake Holder	Optional Data Type: Character with menu list Name of the person requesting the project. May be linked to User data in other applications. Available to all users.
Phone	Optional Data Type: Character Phone number of the Sponsor/Stake Holder. May be linked to User data in other applications.
Organization	Optional Data Type: Character Organization in which the Sponsor/Stake Holder works, or the organization requesting the project. May be linked to User data in other applications.
Account	**Required** Data Type: Character with menu list Any charge code or account number to which the cost of the project may be assigned. This may be a cost center, accounting code, order number, or any other number used to manage and track projects based on business practices. The options may be customized with menu list or linked to related data in other applications. Managed by the AR System Administrator.

Label	APM:Projects Form Details
Project Status	**Required** Data Type: Selection dropdown list The status of the entire project, which is maintained by the application as the project moved from through its life cycle, from planning to completion. The four project statuses are: *Plan* – This is the default status when a new project is created. It is also used to re-plan a project prior to approval. *Pending Approval* – This is the status when the planning is complete and waiting for approval process to be completed. A project with a Pending Approval status is temporarily frozen. The project cannot be modified except to be approved, rejected, or re-planned. *Approved* – When the approval process is completed and all project approvers have changed the status in the APM:Approval Tasks form to *Approved*, the project status is *Approved*. The project will remain in this state until the project manager clicks the Execute Project button, and launches the project into the working phase. *In Process* – When the project manager clicks the Execute Project button, the status changes to *In Process*. It signifies that the project is now in the working phase. *Completed* – This status is automatically initiated when the last task(s) of a project is completed. No more work time can be logged against tasks.
Approval Process	**Required** Data Type: Character Available only for existing project records. Displays the approval process that has been selected for the current project.
Risk	Optional Data Type: Character with menu list Use to indicate the relative risk of the project to your organization: *None*, *Low*, *Medium*, *High*.

Label	APM:Projects Form Details
Project Manager Id	**Required** Data Type: Character with menu list User Id of the project manager assigned to the project. Menu list contains full names of Users with project manager permission. Selection from this menu list automatically populates the Project Manager Id, Project Manager, Project Manager Phone and Extension fields.
Name	System generated Data Type: Character, read only Name of the project manager assigned to the project. Field is populated based on the selection made in the Project Manager Id field.
Phone	Optional Data Type: Character Phone number of the project manager.
Ext.	Optional Data Type: Character Phone extension of the project manager.
Responsible Organization	**Required** Data Type: Character with menu list Each task is assigned to a group with overall responsibility for completing the task. All members of the Responsible Organization may log work time against the task.
APM:Projects Form – Project Info Tab	
Time Unit	**Required** Data Type: Selection dropdown list Specifies the unit of time to be used for the project and its tasks. Selection is from Hours and Days (default). Days is the equivalent to the standard workday set by the AR System administrator (APM default is 8 hours). Selection in this field sets the Time Unit fields on the APM:Tasks and APM:TaskDependency forms.

Label	APM:Projects Form Details
Schedule Orientation	**Required** Data Type: Selection dropdown list The method used to calculate the project schedule. Selections are *Project Start Date* and *Project Finish Date*. The selection made in this field automatically sets similar fields throughout the project. Once a project is executed and the project record has a status of *In-Process* or *Completed*, this field cannot be changed.
Task Notifications	**Required** Data Type: Selection dropdown list This field defines how task notifications will be issued once the project is executed and in the working phase (i.e., *In Process*). ActionProgram Manager offers three notification options: *Assignment* Only – When the status of a task changes from *Hold* to *Assigned*, the Assigned User with responsibility for the task will be notified that the task is ready to be worked. *Project Approval* Only – Upon project approval, a notification is sent to each Assigned Group leader and Assigned User for the tasks in the project. *Project Approval & Assignment* – Notifications are sent both when the project is approved and when a task status changes from *Hold* to *Assigned*. This is the default setting for this field.
Business Workday Tag	**Required** Data Type: Character with menu list Indicates the workday schedule.
Project Plan Start Date	Dependent on the Schedule Orientation field Data Type: Date/Time The date that the first task(s) of the project is planned to start working. The contents of this field are based upon the selection in the Schedule Orientation field (above). If Schedule Orientation is set to Project Start Date, then a date can be entered in this field, or default to current date or earliest date based on the work schedule; if set to Project Finish Date then this field is read only and calculated by the application. If no date is entered, the current date and time will be set as the default. This date may only be modified by the Project Manager or by the application's automatic calculations.

Actual Start Date	System generated, read only
	Data Type: Date/Time
	During the working phase of a project, this field is populated with the date that the first task(s) of the project actually starts. It is set when the status of the first task in the project changes from *Assigned* to *In Process*. This field is used for evaluating project schedule and performance.
Project Base Start Date	System generated, read only
	Data Type: Date/Time
	When a project is executed and a Baseline project plan saved, the Baseline project start date is stored here as a read only field that cannot be changed.
Project Plan Finish Date	Dependent on the Schedule Orientation field
	Data Type: Date/Time
	The planned date of completion for the last task(s) of the project. The contents of this field are based upon the selection in the Schedule Orientation field (above). If Schedule Orientation is set to Project Finish Date, then a date can be entered into this field, or default to current date or earliest date based on the work schedule; if set to Project Start Date then this field is read only and calculated by the application. If no date is entered, the date will default to the result calculated by the application. This date may only be modified by the Project Manager or by the application's automatic calculations.
Actual Finish Date	System generated, read only
	Data Type: Date/Time
	The date that the last task of a project actually finishes. It is set when the status of the project changes from *In Process* to *Completed*. This field is used for evaluating project schedule and performance.
Project Base Finish Date	System generated, read only
	Data Type: Date/Time
	When a project is executed and a Baseline project plan saved, the Baseline project finish date is stored here as a read only field that cannot be changed.
Scope Changes	Optional
	Data Type: Diary field
	Diary text entry field for noting changes to the project scope. Diary entries are part of the project's permanent record. Each entry includes a Time/Data stamp, and the ID of the person who made the entry. Available to all users.

Base Duration	System generated, read only Data Type: Integer The total duration of the project between the Project Base Start Date and the Project Base Finish Date. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Base Labor Hrs.	System generated, read only Data Type: Integer Number of Baseline labor hours set for the project. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Base Cost	System generated, read only Data Type: Integer Cost of the project set in the Baseline. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Planned Duration	System generated, read only Data Type: Integer Sum of the planned project duration set in the in the Duration field on the APM:Tasks form. **IMPORTANT**: If you make changes that affect the planned duration, you need to refresh your screen in order to see your changes.
Planned Labor Hours	System generated, read only Data Type: Integer Sum of all planned labor hours for the project's tasks in the Planned Labor Hours field on the APM:Tasks form. This represents total number of planned labor hours needed to complete the project. It is always calculated in hour time units.
Planned cost	System generated, read only Data Type: Integer Sum of planned cost for the project's tasks. It is derived from the Planned Labor Hours field on the APM:Tasks form, and the defined hourly rates which are determined by the Group cost.
Actual - Labor Hrs.	System generated, read only Data type: Integer Sum of all work time logged for the project's tasks in the Hours Worked field on the APM:Tasks and APM:TechTime forms.
Actual - Cost	System generated, read only Data type: Integer Sum of the objects' tasks in the Hours Worked field on the APM:Tasks and APM:TechTime forms.

Label	APM:Projects Form Details
APM:Projects Form – Costs Tab	
Baseline Costs - Labor	System generated, read only Data Type: Integer Sum of the project's baseline labor costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Expense	System generated, read only Data Type: Integer Sum of the project's baseline expense costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Capital	System generated, read only Data Type: Integer Sum of the project's baseline capital costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Total	System generated, read only Data Type: Integer Sum total of all project's baseline costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Planned Costs - Labor	System generated, read only Data Type: Integer Sum of the project's planned costs.
Planned Costs - Expense	System generated, read only Data Type: Integer Sum of the project's planned expense costs.
Planned Costs - Capital	System generated, read only Data Type: Integer Sum of the project's planned capital costs.
Planned Costs - Total	System generated, read only Data Type: Integer Sum of the project's total planned costs.
Actual Costs - Labor	System generated, read only Data Type: Integer Sum of the project's actual labor costs.

Actual Costs - Expense	System generated, read only Data Type: Integer Sum of the project's actual expense costs.
Actual Costs - Capital	System generated, read only Data Type: Integer Sum of the project's actual capital costs.
Actual Costs - Total	System generated, read only Data Type: Integer Sum of the project's actual total costs.
Project Form Costs Tab – Menu Item Selections	

	The fields on this tab may be customized by the APM Administrator. They are used to store project cost information, and are used by PPM:
	
	      One - Type of Money
	      Two - Type of Project
	      Three - Customer
	      Four - Performing Organization
	      Five - Portfolio
	      Six -(empty)

APM:Projects Form – Task Info Tab	
	System generated table, read only. Fields include: Task ID, Status, Identifier, WBS, Task Name, Summary Task, Assn. User, Assn Group. Double-click on a task to open the APM:Tasks form for that task.
APM:Projects Form – Task Summary Tab	
	Fields on this tab are system generated, and read only. They provide an overview of the tasks for the active project. Fields include: Target Date, Key Assignment1, Key Assignment2, Key Assignment3, Task Priority fields, Target Date
Require Appr	Optional Data Type: Radio button Yes/No

Label	APM:Projects Form Details
APM:Projects Form – Record Info/ Documentation Tab	
Paper Clip icon	Use to attach project documents.
Created By	System generated, read only Data Type: Character ID of the person who created the project record.
Create Date/Time	System generated, read only Data Type: Date/Time Project creation Date/Time stamp.
Last Modified By	System generated, read only Data Type: Date/Time ID of the person who last modified the project record.
Modified Date/Time	System generated, read only Data Type: Date/Time Project modification Date/Time stamp.
Attachments	System generated Data Type: Table, Character List of attached project documents
APM:Projects Form – Pools/Programs Tab	
Create Program	Button on the form Available only for existing project records. Opens the APM:ProjectsPools&Programs form, where you can group projects together into programs for the sake of comparison reporting purposes.
Select Program	Button on the form Available only for existing project records that have not been added yet to a program. Opens the Selection List of existing programs available to the active project.

Show Program	Button on the form
	Available only when a Pool or Program exists. Opens the APM:ProjectPools&Programs form, which provides information about the Pool/Program, including a list of the projects that are included. This form provides
Clear Program	Button on the form
	Available only for existing project records.
Program	System generated
	Data Type: Character
	Name of the Pool or Program.
Program Mgr	System generated
	Data Type: Character
	ID of the Pool or Program Manager.

APM:Tasks Form

Use the APM:Tasks form to create, modify, and review task records, including summary tasks and milestones.

Figure 88 - APM:Tasks Form

APM:Tasks Toolbar
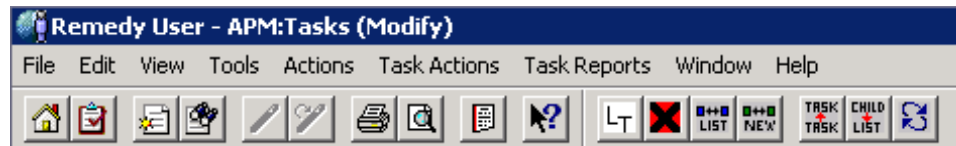
Figure 89 - AR System and APM Task Record Toolbar

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

Label	APM:Tasks Form Toolbar Details
APM:Tasks Form – Toolbar Buttons	
Reports	AR System Button on toolbar
	Opens the APM:Projects Report Styles form.
What's This?	AR System Button on toolbar
	Click this to change the cursor to a dynamic "?". When you click it on an object on the screen, text about that object (field, button, etc.) is displayed. Re-click the What's This? button to toggle out of dynamic help mode.
My Last Task	Button on toolbar
	Opens the last submitted task record based on the User Login Id.
Cancel Task	Button on toolbar
	Opens a dialog asking whether you really wish to cancel the task. Click Yes or No.
List Dependencies	Button on toolbar
	Available for existing task records.
	Opens a query list of all predecessors for the current task record displayed.
Create New Dependency	Button on toolbar
	Available for existing task records.
	Opens a submit window in the APM:TaskDependency form.
Open Summary Task	Button on toolbar
	Opens the task record for the summary task of the active task record.
List Sub-Tasks/Milestones	Button on toolbar
	Available for existing task records.
	Opens a query list for sub-tasks and –milestones of the active task record.
Change Level	Button on toolbar
	Use to create or remove a summary task relationship from the selected task.

APM:Tasks Form Features

The following describe the buttons and fields on this form.

Label	APM:Tasks Form Details
APM:Task Form – Buttons	
Select Project	Button on the form Available when creating a new task. Opens the project selection list. Select a project, and its values are used in the following fields in the new task: Project Id, Project Name, Project Status, and Project Manager.
Display Project	Button on the form Displays the record of the project to which the current task belongs.
Rework Task Process	Button on the form Almost never used.
List Tasks	Button on the form Opens the Selection List of all tasks, sub-tasks, and milestones for the current project.
Create Milestone	Button on the form Opens the Selection List menu with options to create a sub-task milestone, or a milestone.
Create Task	Button on the form Opens the Selection List menu with options to create a sub-task, or a task.
Critical Path	See Form Fields below.
Change Request	Button on the form Opens a selection list of changes to make to the current task, including changing the charge account, the group association, dependencies, dates, hours, resources, scope, and adding a new task.
Clear	Button on the form Clears the Summary Task from the current task record.

Tasks Form Fields	
Project Id	System generated, read only Date Type: Character Unique identifier assigned to the project record
Project Status	System generated, read only Data type: Character The status of the active task's project record.
Project Name	System generated, read only Data Type: Character Name assigned to the project.
Project Manager	System generated, read only Date Type: Character Name of the project manager assigned to the project. Field is populated based on the selection made in the Project Manager Id field on the Projects form.
Task Id	System generated, read only Date Type: Character Unique identifier assigned to the task record
Identifier	**Required** Data type: Selection dropdown list Identifies the type of task record. Select from Task, Summary Task, or Milestone. The application will automatically set the identifier if the task record is a Summary Task.
Status	**Required** Data type: Selection dropdown list Displays the active status of the task. Assigned, In-Process, Hold, Complete, Rejected, Cancelled. During the planning phase, all task records have a status of Hold prior to project approval.
WBS	Both system generated or user designated, read only (but altered via the down arrow) Date Type: Character Work Breakdown Structure. Indicates the relative location of the current task, summary task, or milestone within the project's task list.
Task Name	**Required** Data Type: Character The name of the task, summary task, or milestone.
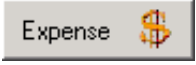
Task Description	Optional
	Data type: Character
	A brief description of the task, summary task, or milestone.
Summary Task	System generated, read only
	Data type: Character
	Name of the summary task if the current task is a sub-task. If the current task is not a sub-task, this field is blank.
Target	Required
	Data Type: Radio Buttons
	Click Yes or No to indicate whether this task, summary task, or milestone is a Target.
Shift Task Worked	Optional
	Data Type: Selection dropdown list
	Indicate what shift will work this task. Default is Standard Workweek. Other options include: 2nd Shift, 3rd Shift, and Task Target Time.
Plan Start Date	Optional
	Data type: Date/Time
	The planned start date of the task, summary task, or milestone. This may be entered manually or calculated by the application.
Plan Finish Date	Optional
	Data type: Date/Time
	The planned finish date of the task, summary task, or milestone. This may be entered manually or calculated by the application.
	System generated, read only
	Data type: Radio button
	Indicates if the active task is on the critical path of the project.
Constraint	Optional
	Data Type: Selection dropdown list
	Indicates constraints on the performance duration of the current task, summary task, or milestone. Values include ASAP, ALAF, FNET, SNET, FNLT, SNLT, MFO, MSO. Selecting any option except the first two causes the Constraint Data to appear.
Constraint Date	Optional
	Data Type: Date/Time with selection calendar.
	Appears when the Constraint selected is FNET, SNET, FNLT, SNLT, MFO, or MSO.
Priority	Optional
	Data Type: Character
	Use to indicate the relative priority of the current task, summary task, or milestone

Duration	Optional
	Data type: Real number
	The estimated calendar duration between the Plan Start Date and Plan Finish Date of the task based upon the time unit and business hours.
Units	System generated, read only
	Data type: Character
	The units of time the project and its tasks are based upon. This is defined in the project record in the APM:Projects form and automatically set in task and milestone records. The time unit may be hours or days. The time unit is used to calculate slack and duration.
Slack	System generated, read only
	Data type: Real number
	The amount of time a task can be delayed or begin early without affecting another task or the project finish. It is the difference between the early and late start dates of a task, based on the time unit and business hours.
Labor Hrs.	Optional
	Data type: Integer
	The estimated time required to actually work the task. This is defined during the planning phase. Once a project is executed, this field is read only.
Responsible Organization	**Required**
	Data Type: Character with menu list
	Name of the Group primarily responsible for the current project.
Organization Id	System generated, read only
	Data Type: Character with menu list
	Id of the selected Responsible Organization.
Name	System generated, read only
	Data Type: Character
	Name of the individual who is the contact for the Responsible Organization.

Tasks Form – Details Tab	
Details/Issues	Optional Data Type: Diary field Diary text entry field for noting details or other important issues for the current task, summary task, or milestone. Diary entries are part of the project's permanent record. Each entry includes a Time/Data stamp, and the ID of the person who made the entry. Available to all users.
Scope Changes	Optional Data Type: Diary field Diary text entry field for noting changes to the task scope. Diary entries are part of the project's permanent record. Each entry includes a Time/Data stamp, and the ID of the person who made the entry. Available to all users.
Change Log	Optional Data Type: Diary field Diary text entry field for noting changes made to the task. Diary entries are part of the project's permanent record. Each entry includes a Time/Data stamp, and the ID of the person who made the entry. Available to all users.
Attachments	System generated Data Type: Table, Character List of attached task, summary task, or milestone documents.
Created By	System generated, read only Data Type: Character ID of the person who created the task, summary task, or milestone record.
Create Date/Time	System generated, read only Data Type: Date/Time Task, summary task, or milestone creation Date/Time stamp.
Modified Date/Time	System generated, read only Data Type: Date/Time Task, summary task, or milestone modification Date/Time stamp.
Last Modified By	System generated, read only Data Type: Date/Time ID of the person who last modified the task record.
APM:Tasks Form – Dependency Tab	

Predecessor Id	Required for dependency relationship
	Data type: Character
	Task Id of the predecessor task record in the dependency relationship. May be entered manually or automatically filled when task record is selected using the Select Predecessor button.
Predecessor Name	Required for dependency relationship
	Data type: Character
	Task name of the predecessor task record in the dependency relationship. May be entered manually or automatically filled in when task record is selected using the Select Predecessor button.
Dependency Type	Required for dependency relationship
	Data type: Selection dropdown list
	Defines the type of dependency relationship. Selection is from Finish:Start (default), Start:Start, Start:Finish, or Finish:Finish.
Delay	Optional for dependency relationship
	Data type: Real number
	Indicates if a delay should be added to the dependency. Inserts a time delay in the dependency relationship between the predecessor task and the dependent task. This number may be a positive or negative number.
Delay Time Units	System generated, read only
	Data type: Character
	Identifies the time units used for calculating the delay in a dependency relationship. This is set based on the Time Units specified in the project record.
Select Predecessor	Button on the tab.
	Opens a selection list of available tasks, summary tasks, and milestones to create a dependency relationship with the active task record. When selected, automatically populates the Predecessor Id and Predecessor Name fields.
Submit Dependency	Button on the tab.
	Submits the dependency relationship to the APM:TaskDependency form for the active task record.
List Dependencies	Button on the tab.
	Opens a query list of all predecessor tasks or milestones for the current task record.
Inter-project Dependencies	System generated table, read only
	List of any inter-project dependencies. Double-click on a record in the list to open the APM Risk Management form for that dependency.

Create IPD	Button on the form
	Opens the New APM:Risk Management form for creating a new inter-project dependency.
Modify IPD	Button on the form
	Opens the Modify APM:Risk Management form for making changes to an inter-project dependency.
APM:Tasks Form – Schedule Tab	
Early Start Date	System generated, read only
	Data type: Date/Time
	The earliest date the task may start, without affecting the project's start date, based upon the task level and dependencies.
Early Finish Date	System generated, read only
	Data type: Date/Time
	The earliest date the task may finish based upon the early start date and duration.
Late Start Date	System generated, read only
	Data type: Date/Time
	The latest date the task may start based upon the late finish date and duration.
Late Finish Date	System generated, read only
	Data type: Date/Time
	The latest date the task may finish, without affecting the project finish date, based upon the task level and dependency relationships.
Base Start Date	System generated, read only
	Data type: Date/Time
	The Baseline start date for the task taken when the project is executed.
Base Finish Date	System generated, read only
	Data type: Date/Time
	The Baseline finish date for the task taken when the project is executed.
Base Duration	System generated, read only
	Data type: Date/Time
	The Baseline duration for the task taken when the project is executed.

Actual Start Date	System generated, read only
	Data type: Date/Time
	Automatically recorded when the task record status changes from *Assigned* to *In Process*.
Actual Finish Date	System generated, read only
	Data type: Date/Time
	Automatically recorded when the task record status changes from *In Process* to *Completed*.
APM:Tasks Form – Work Time Tab	
User	System generated, may be changed by user.
	Data type: Selection dropdown list
	Name of the worker who has entered time worked against the active task.
Date Worked	Displays the most recent date and time that a worker recorded time against the active task.
Account	Account number or charge code to which the cost of the task work time is charged.
Hours Finished	System generated, read only
	Hours of work time that have been completed.
	IMPORTANT: You must refresh the window (close/reopen) to see the effects of entering work time.
Est. Time Remaining	System generated, read only
	Amount of work time remaining before the active task is completed.
Group Association	The Responsible Organization assigned to the active task.
Expense	Button on the form
	Opens the Expense Tracking form, where users can record various types of project expenses.
Time	Button on the form
	Opens the Time Tracking form, where uses can record their time worked against the active task.
T&E	Button on the form
	Opens the Time & Expense Tracking Timesheet, where users can review and record their time and expenses against the active and other tasks.

APM:Tasks Form – Required Resources Tab	
Add	Button on the form
	Opens the Selection List of personnel resources to choose for this task. The selected resource(s) are displayed in the tab.
Remove	Button on the form
	Removes the selected resource from the task.
Assign	Button on the form
	Opens the Assignment Form, which provides information about the cost and schedule availability of the selected resource.
Required Resources List	System generated table, read only
	List of required resources. Double-click on a resource in Required Resources tab to open the Required Resources Reqr Form
APM:Tasks Form – Cost Tab	
Baseline Costs - Labor	System generated, read only
	Data Type: Integer
	Sum of the project's baseline labor costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Expense	System generated, read only
	Data Type: Integer
	Sum of the project's baseline expense costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Capital	System generated, read only
	Data Type: Integer
	Sum of the project's baseline capital costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Baseline Costs - Total	System generated, read only
	Data Type: Integer
	Sum total of the project's entire baseline costs. This field is set as part of the Baseline when a project is executed, and cannot be modified.
Planned Costs - Labor	System generated, read only
	Data Type: Integer
	Sum of the project's planned costs.

Planned Costs - Expense	System generated, read only Data Type: Integer Sum of the project's planned expense costs.
Planned Costs - Capital	System generated, read only Data Type: Integer Sum of the project's planned capital costs.
Planned Costs - Total	System generated, read only Data Type: Integer Sum of the project's total planned costs.
Actual Costs - Labor	System generated, read only Data Type: Integer Sum of the project's actual labor costs.
Actual Costs - Expense	System generated, read only Data Type: Integer Sum of the project's actual expense costs.
Actual Costs - Capital	System generated, read only Data Type: Integer Sum of the project's actual capital costs.
Actual Costs - Total	System generated, read only Data Type: Integer Sum of the project's actual total costs.

APM:Tasks Form – Assigned Workers Tab	
Select	Button on the form
	Opens the Selection List of available resources. The selected resource will be displayed in the table.
Remove	Button on the form
	Removes the highlighted resource from the task.
Assigned Workers	System generated table, read only
	List of Workers assigned to this task. Double-click on a record in the list to open the Modify APM:Worker Assignments form, which contains information about the Assigned Worker, the project, and the active task.
APM:Tasks Form – Ex. App. Tab	
	This tab is used infrequently and only under very special circumstances, and is not documented here.

APM:TaskDependency Form

Use the APM:Task Dependency form to view and modify dependency relationship information for task records. You may also use this form to cancel a task dependency.

Figure 90 - APM:TaskDependency Form

APM:Task Dependency Form Features

The following describe the buttons and fields on this form.

Label	APM:Task Dependency Form Details
APM:Task Dependency Form Buttons	
Select Project	Button on the form Opens a selection list of all projects.
Select Predecessor	Button on the form Opens a selection list of all the predecessor tasks available for the project selected.
Cancel Dependency	Button on the form Cancels the highlighted dependency
Select Dependent	Button on the form Opens a selection list of all the dependent tasks available for the project selected.
Display	Buttons on the form There are 3 Display buttons on the form, which open the project to which the active task belongs, the predecessor
APM:Task Dependency Form Fields	
Status	Dropdown field. Values are *Invalid* and *Valid*. Invalid dependencies are "turned off", and do not affect the project. Valid dependencies are "turned on", and in effect. Use the status to hide a dependency from the rest of the project while you are working on creating it, or to troubleshoot scheduling or other types of problems.
Dependency	Dropdown field. Lists the four possible types of dependencies: Finish:Start – Predecessor must finish before the dependent can start Start:Start – Predecessor must start before the dependent can start Start:Finish – Predecessor must start before the dependent can finish Finish:Finish – Predecessor must finish before the dependent can finish

APM:Resources Form

Use the APM:Resources form to review the resources (personnel and skills) that are available for project planning.

Figure 91 - APM:Resources Form

APM:Approval Tasks Form

Use the APM:Approval Tasks form to manage the approval process. This is the form that is used to review and approve or reject a project plan.

Figure 92 - APM Approval Tasks Form

APM:Time & Expense Tracking Forms

Use the following forms to record, review, and approve task work time and expenses. These Time & Expense Tracking forms may be opened from the APM:Tasks Form > Work Time tab, or APM:Navigation > Timesheet > T&E Tracking.

PRI:Expense Tracking Form

Use this form to track various types of expenses.
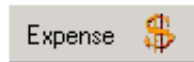
Figure 93 - PRI:Expense Tracking Form

PRI:Time Tracking Form

Use this form to record the time worked against the active task.

Figure 94 - PRI:Time Tracking Form

PRI:Time & Expense Tracking Forms

Use these forms to review and record time and expenses against the active task and other projects. To access time tracking, click on the clock. To access expenses, click on the dollar sign.

Figure 95 - PRI:Time Tracking

Figure 96 - Time Tracking Detail
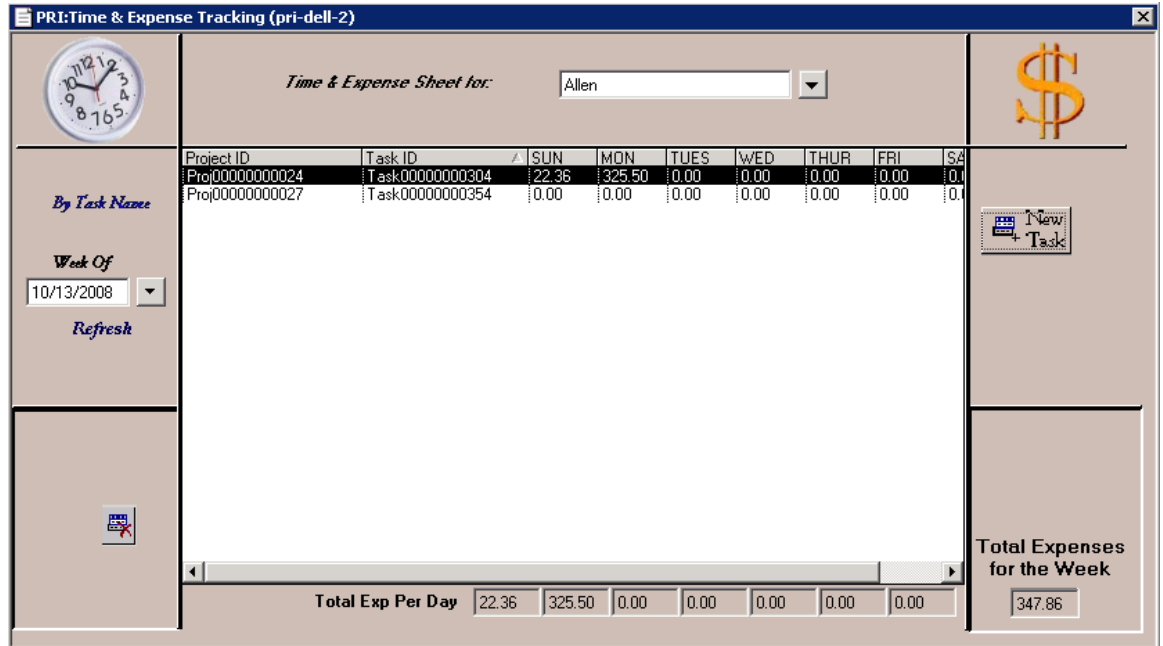
Figure 97 - PRI:Time & Expense Tracking

Figure 98 - Expense Tracking Detail

APM:Time Approval Form

Use the Time & Expense Tracking form to review, approve, or reject work time and expenses.

Figure 99 - PRI:Approve T&E Time Approval

Figure 100 - PRI:Approve T&E Expense Approval

APM:ProjectPools&Programs Form

Use the Ampoule & Programs form to view information about a Pool/Program, including which projects are included, their cumulative costs totals, etc.

Figure 101 - APM:ProjectPools&Programs

APM:Risk Management Form

Use this form to create, modify inter-project dependency relationships. You may also use this form to cancel an inter-project task dependency.

Figure 102 - APM:Risk Management Inter-Project Dependencies Form

Three Important Background Forms

These are the forms used in conjunction with APM resources.

APM:SkillSets Form

The APM:SkillSets form is the form in which skills can be added to the enterprise that were not included in the out-of-box APM installation.

Figure 103 - APM:SkillSets Form

APM:ResourceLocations Form

The APM:ResourceLocations Form is the form in which enterprise locations are added and maintained.

Figure 104 - APM:ResourceLocations Form

APM:GroupAssociations Form

The APM:GroupAssociations form is the form in which the organizations (or "groups") are added and maintained.

Figure 105 - APM:GroupAssociations Form

APM:Resources Form

The APM:Resources Form is the form in which the individual resources – people – are added and maintained within APM.

Figure 106 - APM:Resources Form

Appendix C: Critical Path Method Scheduling – An Overview

ActionProgram Manager keeps track of 10 dates for each task. This section of the User Manual describes how Critical Path Method date calculators work, including ActionProgram Manager's, and how each of these dates is calculated.

This section discusses the following terms:

- Critical Path

- Critical Path Method date calculations

- Project Start Date schedule orientation.

- Project Finish Date schedule orientation.

- Early start date.

- Early finish date.

- Late start date.

- Late finish date.

- Planned start date.

- Planned finish date.

- Dependencies.

- Dependency types.

- Finish to start.

- Finish to finish.

- Start to start.

- Start to finish.

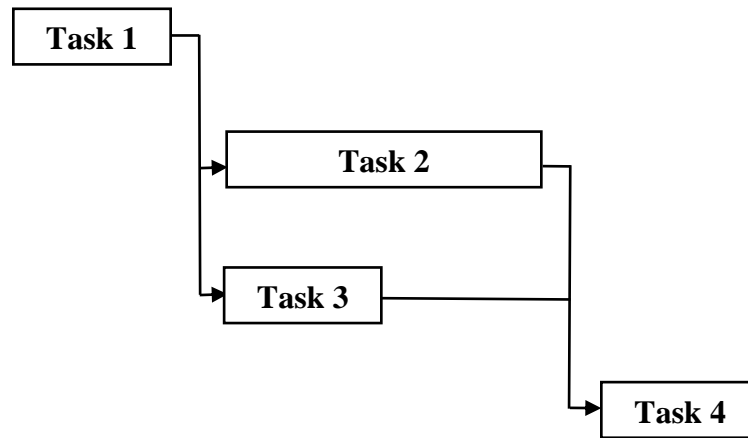- Slack or lag.

- Constraints and constraint dates.

Project Plan Schedule Example

Let's say that our project plan has 4 tasks:

- Task 1 will last 2 days.

- Task 2 will last 4 days.

- Task 3 will last 2 days.

- Task 4 will last 2 days.

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

If we diagrammed this project, it would look like the following:

```
┌──────────┐
│  Task 1  │────────┐
└──────────┘        │
                    │
                    ▼
            ┌──────────────────┐
            │     Task 2       │────────┐
            └──────────────────┘        │
            ┌──────────────────┐        │
            │     Task 3       │───────┐│
            └──────────────────┘       ││
                                       ▼▼
                                 ┌──────────┐
                                 │  Task 4  │
                                 └──────────┘
```

Let's look at the data. 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 however. Since task 2 will last 4 days and task 3 will last 2 days, obviously there is some leeway, specifically 2 days leeway, as to when task 3 actually starts 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"** while task 3 is not on the critical path, as long as task 3 gets finished before or at the same time as task 2. If task 2 takes less than 2 days to finish and task 3 takes more than 2 days to finish, 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

If we start with the planned start date of the project and calculate when each task will start and finish, this is called using a **Project Start Date Schedule Orientation.**

If we start with the planned finish date of the project and calculate when each task will start and finish, this is called using a **Project Finish Date Schedule Orientation.**

Let's first look at the Project Start Date Schedule Orientation. Let's say that the Project Plan Start Date is day 1 at 8AM, and that task 1 starts immediately when the day begins. Day 1 at 8AM is the earliest that task 1 can start, so day 1 at 8AM is called the "**early start date**" for task 1.

We know that if task 1 starts on day 1 at 8AM and takes as long as we think it will to finish, the earliest task 1 can finish is day 2 at 5PM (assuming that we are working an 8AM – 5PM work day). Because of this, day 2 at 5 PM is called the "**early finish date**" for task 1.

If task 2 starts immediately after task 1is finished, the earliest task 2 can start is 8AM on day 3. The "early start date" for task 2 is day 3 at 8AM.

Similarly, if task 3 starts immediately after task 1 is finished, the earliest task 3 can start is 8AM on day 3. The "early start date" for task 3 is day 3 at 8AM.
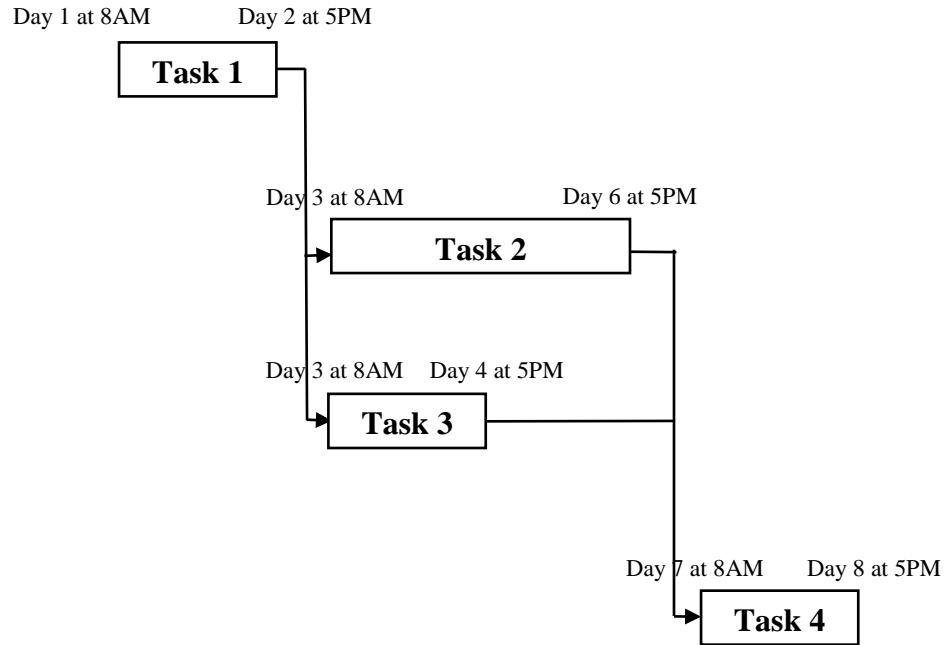
If task 2 starts at 8AM on day 3 and really takes 4 days to complete, the earliest task 2 can finish is day 6 at 5PM. Because of this, day 6 at 5 PM is called the "early finish date" for task 2.

If task 3 starts at 8AM on day 3 and really takes 2 days to complete, the earliest task 3 can finish is day 4 at 5PM. Because of this, day 4 at 5 PM is called the "early finish date" for task 3.

When is the earliest date task 4 can start?

Since both tasks 2 and 3 have to finish before task 4 can start, and task 2 will take longer than task 3, the earliest task 4 can start is just after task 2 finishes, which is day 7 at 8AM. That means that the "early start date" for task 4 is day 7 at 8AM. If task 4 starts at 8AM on day 7 and takes 2 days to complete, the earliest date it can finish is at 5 PM on day 8. The early finish date for task 4 is 5PM on day 8.

Now our plan looks like the following:

Day 1 at 8AM   Day 2 at 5PM

Task 1

Day 3 at 8AM   Day 6 at 5PM

Task 2

Day 3 at 8AM   Day 4 at 5PM

Task 3

Day 7 at 8AM   Day 8 at 5PM

Task 4

So far, we have determined / calculated the **"early start date"** and **"early finish date"** for each task of the project. This assumes that the "project plan start date" is day 1 at 8AM and our "company workday" schedule is 8AM – 5PM.

Now, the system goes back 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 day 8, and it lasts 2 days, it has to start on day 7 at 8AM. Day 8 at 5PM is called the **"late finish date"** and day 7 at 8AM is called the **"late start date."** These are the latest dates when the task can start and finish and not impact the end-date of the project.

If task 4 starts on day 7 at 8AM, that means tasks 2 and 3 have to finish by 5PM on day 6. Day 6 at 5PM is the "late finish date" for both tasks 2 and 3.

If task 3 finishes at 5PM on day 6, since it will only last 2 days, it has to start on day 5 at 8AM. Day 5 at 8AM is the **"late start date"** for task 3 because if it starts after day 5 at 8AM, it will impact the end date of the project.

If task 2 finishes at 5PM on day 6, since it will last 4 days, it has to start on day 3 at 8AM. Since both task 2 and task 3 can start when task 1 finishes, task 1 can end on day 2 at 5PM, and if it does, it will start on day 1 at 8AM.

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 there is a difference, the task is not on the critical path.

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.

Day 1 at 8AM   Day 2 at 5PM

Task 1

Day 1 at 8AM   Day 2 at 5PM

Day 3 at 8AM   Day 6 at 5PM

Task 2

Day 3 at 8AM   Day 6 at 5PM

Day 3 at 8AM   Day 4 at 5PM

Task 3   **Task 3**

Day 5 at 8AM   Day 6 at 5PM

Day 7 at 8AM   Day 8 at 5PM

Task 4

Day 7 at 8AM   Day 8 at 5PM
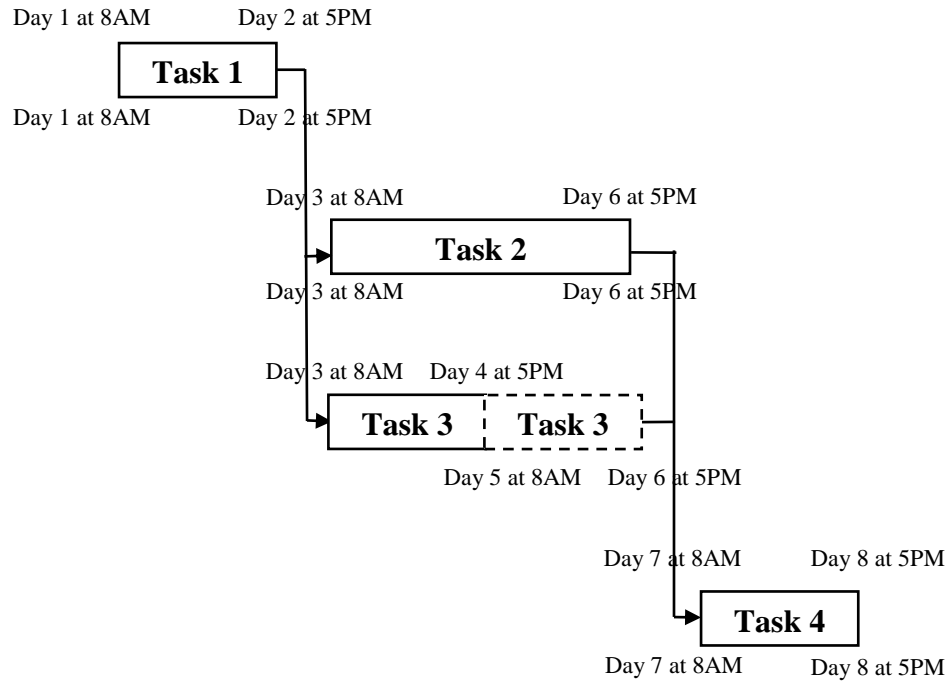
Planned Start Date and Planned Finish Date

MS Project added two new terms to this niche: Planned Start Date and Planned Finish Date. When using the Project Start Date Schedule Orientation, the early start date and early finish date are the planned start date and planned finish date. When using the Project Finish Date Schedule Orientation, the late start date and late finish date are the planned start date and planned finish date for the project.

Constraint Dates

Most project management systems have another capability that can be used to determine a plan's date schedule. The system gives you the ability 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 planned.

- As late as planned.

Critical Path Method Scheduling Summary

Critical path method scheduling uses 1) the project plan start date or the project plan finish 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 is called a "project plan."

Critical path method scheduling systems calculate the dates both ways. If you specify that the project should use an Project Start Date Schedule orientation, the system 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 back 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. This answers the question, if the project starts on a specific date, when will it end?

Using the Project Finish Date Schedule orientation, the planned finish date is entered rather than the planned start date. The system 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. That becomes the planned start date. Then it calculates the early start and finish dates for each task, and compares them.

This answers our initial question: "If we need the project to finish by a specific date, when does it have to start?"

If you need more information, please contact your Project Remedies consultant with your question(s).

Appendix D:
Creating a Multi-Level Project Plan Without Using a Template

This tutorial explains how to create a multi-level project plan in ActionProgram Manager one task and one dependency at a time. For our example, we will create a project plan that has 3 summary tasks, and sub-tasks under each summary task.

Briefly, first create the summary tasks from the APM:Project form. Once they are created, create sub-tasks under each summary task using the APM:Tasks form. Dependencies are defined on the APM:Tasks form.

Create a New Project Record

1. From the Navigation form, click on the New Project button. Then click on the Active button. The APM:Projects from will open.

2. Enter at least the required parameters:

   - Project Name.

   - Description.

   - Account.

   - Select an Approval Process.

   - Project Manager ID.

   - Responsible Organization.

   - Please enter next Monday as a planned start date. If you do not enter a project plan start date, APM defaults to the current date and time.

3. Click Save. The project record is created.

Define the First Summary Task

1. Click on the Create Task button on the APM:Projects form. The APM:Tasks form opens.

2. Enter at least the required parameters:

- Task Name. Please name this task "Summary task 1."

- Responsible Person.

- If you do not enter a Planned Duration, APM defaults to 1 day.

3. Change the Identifier from Task, which is the default, to Summary.

4. Click on the down arrow next to the WBS field. The number 1 will appear in the field.

5. Click Save. This saves the record, closes the APM:Tasks form, and takes you back to the APM:Projects record for this project.

Define the Second Summary Task

1. Click on the Create Task button on the APM:Projects form. The APM:Tasks form opens.

2. Enter at least the required parameters:

- Task Name. Please name this task "Summary task 2."

- Responsible Person.

- If you do not enter a Planned Duration, APM defaults to 1 day.

3. Change the Identifier from Task, which is the default, to Summary.

4. Click on the down arrow next to the WBS field. A window will open. Select "Place Task after the Selected Task" and click on OK. "x1" will appear in the WBS field.

5. Click Save. This saves the record, closes the APM:Tasks form, and takes you back to the APM:Projects record for this project. This changes the "x1" in the WBS field to "2."

Define the Third Summary Task

1. Click on the Create Task button on the APM:Projects form. The APM:Tasks form opens.

2. Enter at least the required parameters:

- Task Name. Please name this task "Summary task 3."

- Responsible Person.

- If you do not enter a Planned Duration, APM defaults to 1 day.

3. Change the Identifier from Task, which is the default, to Summary.

4. Click on the down arrow next to the WBS field. A window will open with 2 choices.

5. Select Summary task 2 and click on OK. Another window opens with 2 choices.

6. Select "Place Task after the Selected Task" and click on OK.

7. Click Save. This saves the record, gives the 3rd summary task a WBS of 3, closes the APM:Tasks form, and takes you back to the APM:Projects record for this project.

Additional summary tasks are created the same way that this Third Summary Task was created.

Add the First Sub-Task Under Summary Task 1

1. From the APM:Projects form, click on the List Tasks / Milestones button. A window opens.

2. Please select no. 1, List Entire Project, and click OK. The APM:Tasks form opens in Matching mode. Please note that Summary tasks 1, 2 and 3 were created. Each task has a WBS code of 1, 2, and 3 respectively.

   Summary task 1 is highlighted.

3. Click on the Create Task button on the left-middle part of the form. A window opens.

4. Select "Create a Sub-Task for the Current Task" and click on OK. A "new" record opens.

5. Enter at least the Required fields.

   • Task Name. Please call this task "Sub-task 1."

   • Responsible person.

   • Please enter a planned duration of 2 days. If you do not enter a planned duration, APM will default this to 1 day.

   • Please leave the Identifier as "Task."

   • Do not click on the down arrow next to the WBS field.

6. Click Save and then press F5 to refresh the query. Please note that Sub-task 1 is under Summary task 1, and has a WBS code of 1.1. APM generated this WBS code automatically.

Add the Second Sub-Task Under Summary Task 1

Summary task 1 is still highlighted.

1. Click on the Create Task button a second time. A window opens. Select "Create a Sub-Task for the Current Task" and click on OK. A "new" record opens.

2. Enter at least the Required fields.

   - Task Name. Please call this task "Sub-task 2."

   - Responsible person.

   - Please enter a planned duration of 2 days. If you do not enter a planned duration, APM will default this to 1 day.

   - Please leave the Identifier as "Task."

   - Click on the down arrow next to the WBS field. A window opens. Select "Place Task After the Selected Task" and click on OK. "x1" appears in the WBS field.

3. Click Save and then F5 to refresh the query. Please note that Sub-task 2 is also beneath Summary task 1, sits after sub-task 1, and has a WBS code of 1.2.

Add the Third Sub-Task Under Summary Task 1

Summary task 1 is still highlighted.

1. Click on the Create Task button a third time. A window opens. Select "Create a Sub-Task for the Current Task" and click on OK. A "new" record opens.

2. Enter at least the Required fields.

   - Task Name. Please call this task "Sub-task 3."

   - Responsible person.

   - Please enter a planned duration of 3 days. If you do not enter a planned duration, APM will default this to 1 day.

   - Please leave the Identifier as "Task."

   - Click on the down arrow next to the WBS field. A window opens. Select Sub-task 2 and click on OK. Select "Place Task After the Selected Task" and click on OK.

3. Click Save and then press F5 to refresh the query. Please note that Sub-task 3 is also beneath Summary task 1, sits after sub-task 2, and has a WBS code of 1.3.

All additional sub-tasks to Summary Task 1 are entered the same way as Sub-task 3.

Sub-tasks under the other Summary tasks are entered the same way that these first 3 sub-tasks have been entered.

Add a Finish / Start Dependency Between Sub-Task 1 And Sub-Task 2

1. On the APM:Tasks form, select Sub-task 2.

2. Click on the Dependency tab in the lower left hand corner of the form.

3. Click on the Select Predecessor button. A window opens show all "tasks" and "milestones," i.e. those tasks that have an Identifier of "task" or "milestone." Dependencies are defined between tasks and milestones, but not between summary tasks, i.e. those tasks that have an Identifier of "summary."

4. Select "Sub-task 1" and click on OK. Note that Finish:Start is the default Relationship type and zero is the default Delay.

5. Click on the Submit Dependency button.

Add a Finish / Start Dependency Between Sub-Task 2 and Sub-Task 3

1. On the APM:Tasks form, select Sub-task 3.

2. Click on the Dependency tab in the lower left hand corner of the form.

3. Click on the Select Predecessor button. A window opens show all "tasks" and "milestones," i.e. those tasks that have an Identifier of "task" or "milestone." Dependencies are defined between tasks and milestones, but not between summary tasks, i.e. those tasks that have an Identifier of "summary."

4. Select "Sub-task 2" and click on OK. Note that Finish:Start is the default Relationship type and zero is the default Delay.

5. Click on the Submit Dependency button.

View the Gantt Chart for This Project

1. Close the APM:Tasks form, which brings you back to the APM:Projects form.

2. Click on the Refresh button in the upper right hand corner of the form.

   In the lower right hand corner of the APM:Projects form, note that the planned duration for this project is 7 days.

3. Click on the Gantt chart button on the middle / left hand portion of the form. This generates the Gantt chart.

   Only one line for the project is shown.

4. Click on the + sign next to the project name. Now you see the 3 summary tasks.

5. Click on the plus sign next to Summary task 1. Now you see the sub-tasks under Summary task 1.

This concludes our tutorial example. If you have additional questions, please contact your PRI support consultant or the PRI help desk at 801-794-0614.

Appendix E:
Assigning Resources to Tasks

This tutorial describes how to use the Resource Management Chart to review resource availability, assigning Resources (People) to tasks, and understanding resource costs.

Within ActionProgram Manager, there are two ways to assign people to tasks. You can use the Required Resources tab or the Assigned Workers tab, and both ways are described in this section. When tasks are assigned, the assignments are displayed on the Resource Management chart. Let's see how busy specific people are at this time. For that, we want to look at APM's Resource Management chart.

Review Resource Availability Using the Resource Management Chart

1. Open the APM:Navigation form. Click on the Charts button, then the Resources button, and then the Active Project button. A dialog box opens. This dialog box allows you to define the data you want to see in the Resource Management chart. Later, when there is more data in the system, play with this so you can see the different types of charts you can generate. There are actually 36 different views of the data that can be displayed for each chart.

2. Enter a range of dates in the "From" and "To" fields, starting with next Monday and going out for 3 weeks to the Friday of that week. Click on the Show RM Chart button. Write down these dates, because we will use them again later in this exercise.

3. The Resource Management chart will be generated, showing how busy each person is. Most likely, no tasks have been assigned to anyone, so all of the boxes on the chart are probably white and there is a zero in each box. White indicates that no time has been assigned. Later, we will discuss what green, yellow and red mean.

4. Click on the Red X in the upper right hand corner to close the chart. Click on the Cancel button on the dialog box, which closes the dialog box.

Assign People to Tasks Using the Required Resources Tab

1. On the APM:Navigation form, click on the Main Menu button. If you have previously created a project plan, you might want to use that project plan for the rest of this exercise. Please make sure that the start date of the project is

next Monday. If not, create a project plan using the "AR System Implementation" template, use the Planned Start Date orientation, and use next Monday as the planned project start date.

2. When the project plan has been created, click on the List Tasks / Milestones button, select "1) List Entire Project," and click on OK. This opens the APM:Tasks form. If you scroll down, you will see all of the tasks (Summary tasks, Tasks, and if you have any, Milestones) that make up this project plan.

3. Highlight the first task, i.e. the first task that has the Identifier of "Task." Resources are not assigned to Summary tasks or Milestones.

4. Click on the Cost tab. The only cost shown is the Planned Labor Hours cost. When the project starts, the last plan will be frozen as the baseline plan. If you are doing time tracking, the actual cost fields will be populated as time is posted against each task. But for now, we are only dealing with the Plan. This amount is calculated as follows: the planned labor hours times the rate for the Responsible Person (which is stored in the APM:Resources form.) Please write down this cost. As we give APM more information, the planned labor cost will be recalculated.

5. Click on the Required Resources tab, and then the Add button.

6. The list of skill codes (from the APM:Skillsets form) opens. Select the skill code you think is needed for this task. If using the data that comes with APM out-of-the-box, select FSI-D, Sr. Developer, and click on OK.

7. A list of locations (from the APM:ResourceLocations form) opens. Select the location where this task will be worked, and click on OK. If using the data that comes with APM out-of-the-box, select Orem, UT and click on OK.

8. Enter the number of people that will be working this task. For our demonstration, please enter the number "2," and click on the Execute button.

9. Please note that the entry in the window on the Required Resources tab now shows the rate for the people with that skill code, as well as the "status" which is Unassigned. When we actually assign people to the task, the status in this window will be Assigned.

10. Click on the Cost tab. Note that the cost has changed. The calculation now is: the planned labor hours times the rate for the people with that skill code. Please write down this new cost and compare it with the original cost. As you give APM more resource information, it recalculates the resource cost.

11. Click on the Required Resources tab. Highlight the first resource code entered, if it is not already highlighted, and click on the Assign button. A dialog box will open. Important data elements regarding this task are at the top of this window, including:

- The Planned Start and Finish Dates.

- The Planned Required Labor Hours.

- The Number of People Needed.

12. Click on the "Click to Refresh" words in the middle of the window. A list of people with that skill code specified at the location specified opens. For each person, you see their organization (from the APM:GroupAssociations form), their "free hours," each person's rate (typically an "average rate" stored in the APM:Resources form), and each person's skill codes (stored in the APM:Resources form). Note that you see people from different organizations. If the people in your organization are swamped, this gives you an opportunity to assign people from other organizations that might be available to work this task. This facilitates the "efficient use of resources."

13. Free hours. If no work has been assigned to these people from other tasks, the free hours shown is the average Assignable Daily Hours, which is on the APM:Resources form, times the duration of the task. If a person has said that they have 8 hours on average available for project tasks in the APM:Resources form, and this task's duration is 4 days, the person will have 32 free hours. If they only have 4 hours available for project tasks, the person will have 16 free hours. If work has previously been assigned to people from other APM:Tasks, the number of free hours is the total number of free hours for the length of the task, less the number of hours previously assigned to the person during this range of dates. The out-of-the-box business rule is that a person can be over-assigned.

14. Highlight a person's name, go to the Hours to Assign field in the lower left hand corner of the window, enter a number which is less than the total planned labor hours, and click on the Assign It button to the right of the field.

15. Now highlight a second person's name, go to the Hours to Assign field, enter the remaining hours in the Hours to Assign field. Click on the Assign It button to the right of the field.

16. Click on the Apply Changes button, to the right of the Assign It button on the same line. This closes this dialog box and takes you back to the APM:Tasks form.

17. Click on the Required Resources tab. Note that the status for this skill is Assigned.

18. Click on the Assigned Workers tab. Note that the people you assigned to this task are listed there, along with the hours assigned to each person, their rate, and their skill and location codes.

19. Click on the Cost tab. Now the planned labor cost has changed again. Now, the planned labor cost is the total of the hours assigned to each person times their specific rate.

How does the Resource Management chart look now?

1. Leave the APM:Tasks form open, because we will come back to it shortly. Go to the "Windows" command and go the APM:Navigation form. Click on the Main Menu button, then the Charts button, the Resources button and the Active Project button. The dialog box opens.

2. Enter the same range of dates you entered before, which should include the range of dates for the task you just assigned people to, and click on the Show RM Chart button. The Resource Management chart is generated, and the hours assigned to each person are displayed. The hours are spread over the range of dates. For example, if you assigned 10 hours to a person and the planned duration of the task is 4 days, 2.5 hours will be in each box for each of the 4 days.

   Also, the boxes are color-coded:

   - If no time has been assigned, the box is white.

   - If the person is 1 – 80% busy, the box is green.

   - If the person is 81-99% busy, the box is yellow.

   - If the person is 100% or over-assigned the box is red.

   This calculation is based on the number of hours assigned to that person for that day divided by the Assignable Daily Hours entered for that person in the APM:Resources form. The Assignable Daily Hours is the average amount of time that person has each day for project tasks.

   - The Resource Chart is robust. For example, if the planned start-date of the project changes, all of the dates for the tasks are recalculated. The task assignments are moved accordingly. Any time, the planned start date of a task changes, the resources assignments are moved automatically.

3. Close the Resource Management chart.

Assign People to Tasks Using the Assigned Workers Tab

1. Go back to the APM:Tasks form and highlight the 2nd task, i.e. the 2nd task that has the Identifier "task."

2. Click on the Cost tab and note the Planned Labor Cost. As you will recall, this is the planned labor hours for the task times the Responsible Person's rate. As we give APM more information, it will recalculate this cost.

3. Click on the Assigned Workers tab, then the Select button. A list of skill codes opens. Select a skill code and click on OK; you might want to choose the same skill code used earlier in this exercise.

4. A list of locations opens. Select a location and click on OK; you might want to choose the same location selected earlier in this exercise.

5. Now, a list of people with that skill code located at that location opens. Relevant information for each person, including their rate, is also shown, but their "free hours" is not shown.

6. Select a person and click on the OK button. A dialog box opens. Please enter the number of hours that you want to assign to this person. Enter a number less than the planned labor hours for the task, and click on the Execute button. The dialog box closes, and you will see a summary of what you just entered in the window on the Assigned Workers tab.

7. Do the same thing again, only this time select a different person. You might want to select a different skill code and or a different location. The sample data is for FSI-D and FSI-PM. Give this 2nd person the remaining planned labor hours for this task. If you enter too many hours, i.e. more that the total planned labor hours for the task, you will get an error message, and will have to make the entry again. When you click on the Execute button, the dialog box closes and you will see the 2nd entry summarized on a 2nd line in the window on the Assigned Workers tab.

8. Click on the Cost tab. Note that the planned labor cost for this task is now the total of the labor hours assigned to each person times each person's rate.

9. Click on the Required Resources tab. Note that the tab is empty. This indicates that people were assigned using the Assigned Workers tab.

How does the Resource Management chart look now?

1. Go to the APM:Navigation form. If you are not at the Main Menu, click on the Main Menu button. Click on the Charts button, then the Resources button, then the Active Project button.

2. Enter the same range of dates that you have been using, and click on the Show RM Chart button.

3. Note the differences. Move your cursor over one of the cells in which time has been assigned. A summary of the hours assigned for that day appears, including the name(s) of the project(s) and task(s) that make up that time. This is very helpful information, because if a person is over-assigned and they ask what they should do first, you can see the tasks that make up the work for the day and prioritize accordingly.

We have seen the two ways task assignments get on the Resource Management chart. When the task is worked and the status of the task is changed to Complete, the assignment automatically comes off the Resource Management chart.

If you have any questions about this functionality, please contact your PRI consultant or your internal ActionProgram Manager trainer.

Appendix F:
Service & Support

Service and support for ActionProgram Manager and other products from Project Remedies Incorporated can be obtained from:

Main Office

Project Remedies Inc.
2034 Palisades Dr.
Pacific Palisades, CA 90272
United States
Phone 310.230.1722

Email info@pri-us.com
Web   www.pri-us.com

Glossary

TERM	DEFINITION
approval process	The approval process is the orderly sequence of project plan reviews and approvals by project managers and stakeholders. The approval process may include whomever you want. The default approval processes that are included with APM are Technical and Corporate. You may select either one or both; a project may have multiple approval processes.
approve a plan	Approving the project plan is usually a multi-step process where various managers and stakeholders approve the project plan before it starts. The process is called the approval process. When all the approval tasks are approved, the plan the status is automatically changed to *Approved*.
baseline	Snapshot of the project plan taken at the moment the plan is executed.
	The plan is in a constant state of flux through the lifespan of the project, but once set, the baseline never changes.
CPM	Critical Path Method. See: critical path.
constraints	Task constraining acronyms:
	ASAP - As Soon As Possible
	ALAP - As Late As Possible
	FNET - Finish No Earlier Than
	SNET - Start no Earlier Than
	FNLT - Finish No Later Than
	SNLT - Start No Later Than
	MSO - Must Start On
	MFO - Must Finish On
critical path	APM calculates the project work schedule, analyzes the dependencies among tasks, and determines which task path is the longest. This is called the "critical path method", or "CPM".
	See also: slack

TERM	**DEFINITION**
cut date	Task target date. When a task must be performed on a certain date, the task is defined as a target, and the date is called the cut date. The target task may be in the middle of the project. A cut date functions as a "gate keeper" date, by forcing the project manager to reevaluate dates, tasks, and resources if slippage occurs around a critical task. See also: target.
dependency relationships	Finish:Start – Predecessor must finish before the dependent can start Start:Start – Predecessor must start before the dependent can start Start:Finish – Predecessor must start before the dependent can finish Finish:Finish – Predecessor must finish before the dependent can finish
duration	The planned or actual duration of the project or task. For example, a task may only require 3 hours of work time to complete, but can be performed over a 3-day period. The duration is 3 days. See also: recalc
execute a project plan	Execute a project plan. Starting the project. After the project has been planned and approved, it may sit in that dormant state, where no changes are allowed, until the project manager decides that it is time to begin execution of the plan. The Project Manager clicks the Execute Project button on the APM:Projects form to start the project. The Baseline is created, and the project status changes from *Approved* to *In-Process*. Task notifications are sent. See also: approve a plan
group	In each Remedy-based application, there are two forms where people are defined: User and Group. People are users and they are part of Groups. Permissions are defined at the Group level. Also called an organization.
organization	See group.
plan	There are two types of plan: Baseline Plan and the Current Plan.

TERM	DEFINITION
	The Current Plan is the current sum total of all defined tasks, milestones, resources, etc. It is a fluid description of the project, which changes as the project changes, from start to finish.
	When the Current Plan is executed into the Working Phase, a snapshot is created of the Plan at that moment in time. This snapshot is the Baseline Plan. The Current Plan is in a constant state of flux through the lifespan of the project, but once set, the Baseline Plan never changes.
rate	The dollar amount cost of an hour of labor. Rates are assigned to skills, locations, organizations, and people. This makes it possible to estimate the costs of a project plan without having to consider individual people, so you can focus on the more abstract requirements such as the skills that will be needed.
recalc	APM:Projects form button. Enabled only for approved Plans. Recalculates the Plan when changes have been made that affect project duration, to ensure that the project stays in-synch.
	Recalc will calculate the Critical Path Method for duration dates. (Number of labor hours are recalculated automatically, and Recalc does not include Rollups.)
resources	In APM, resources are people. When people are added to APM, they are associated with skills, locations, organizations, and rates. Note that in PPM, resources are skills, locations, and organizations; no people resources are added until the proposed project becomes a project plan.
responsible organization	The Group that is responsible for a project.
slack	The amount of time a task may be delayed or begin early, without affecting another task or the project finish. It is the difference between the early and late start dates of a task. See also: critical path.
target task	The target task is one from which critical path is calculated. Normally in project management systems, critical path calculations are based on the Planned Start Date or the Planned Finish Date. In APM, another task, in the middle of the project, can also be used as both the planned finish for the tasks before it, and the planned start date for the tasks after it. Tasks before and after the target may shift in the Plan, but the target task acts as an anchor. The critical path is recalculated, but the target

TERM	DEFINITION
	remains in place.
	See also: cut date. The cut date can be used for recalculating the plan. For example, let's say that a project starts of the 1st day of the month and ends on the 30th day of the month. If you decide that the last task must end on the 20th of the month, the 20th is defined as the cut date for that task. APM recalculates the durations proportionately so that the project will end on the 20th.
template	A template is a series of tasks and the relationships between them. It is management's definition of how they want a type of project to be performed.
	There are two kinds of templates: Task and Approval. Templates are defined in APM and can be used when creating a new project. Several templates are included with each APM installation.
WBS	"Work Breakdown Structure". aka "levels". Can either be system-generated or user designated. Orders the display of project tasks, sub-tasks, and milestones.

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