

98. What should I consider when setting up software tools I will be using to coordinate many interrelated projects?

Depends on:

- ▲ Regulations and industry standards
- ▲ Organizational requirements
- ▲ Program management office (PMO) recommendations

Managing Program Information

Large programs are typically subject to a lot of rules and guidelines. Assess all the information requirements that your program will need to comply with, and determine how you plan to meet them. If there are significant long-term requirements for providing permanent storage of project data related to health, safety, environmental, or other legal obligations, plan to establish (or take advantage of existing) infrastructure to conform. Estimate any necessary costs and include them in your resource plans and project budget. If your program is expected to observe any organizational or PMO requirements, determine how best to deal with them, too.

Large programs generate a great deal of information. Setting up an effective project or program management information system (or PMIS, as described in Problem 33) is essential for control and coordination of ongoing work. Organize your online data so that your distributed project team members can easily find what they need.

If the information infrastructure available to you appears inadequate or you will be establishing a knowledge management hierarchy from scratch, investigate options that will provide advanced capabilities to increase utility and ease of use. Consider software products that provide for multiuser check-out/check-in, coordinated updating, automated version maintenance, alias naming capability that allows information in a single file to be accessed from several places in the hierarchy, “key word in context” searching, tailored security, and other advanced access functions. More basic offerings can provide hierarchical network

folder structures and some access security and control, but such modest capabilities can present problems for large, complex programs.

Document your program's staffing hierarchy clearly using a well-organized roster containing an up-to-date list of all the contributors involved in your program. Include roles, responsibilities, project affiliations, and full contact information for everyone, especially for the project leaders, program staff, and subject matter experts.

Delegate responsibility to an owner at the program level for managing the information in your PMIS and for supporting all of your users. Ensure that your program team has sufficient expertise in all the technical tools you are using, and will be able to provide adequate support to all program contributors. Work with the vendors of your software tools to keep your versions current. Coordinate any upgrades or changes required so they will not disrupt your program.

Coordinating Program Plans and Monitoring Progress

Work to establish access and use of common computer scheduling tools for all the projects within the program. Provide planning templates and involve program staff in project startup workshops and planning meetings to ensure overall consistency.

Adopt computer-based project management software that can support the size and other requirements of your program, and ensure that it is sufficiently compatible with the corresponding tools used by all of the project leaders. Using centralized, high-end tools for this can have a number of advantages, as outlined in Problem 97. If you choose to adopt a sophisticated project management tool, provide adequate training for all users and establish adequate expertise on your program team to keep things running smoothly, and provide advice and mentoring to others. Realistically assess the costs and effort required, and budget accordingly. In addition to the costs, consider the processes, both automated and manual, that you will need to establish and maintain to synchronize your hierarchy of plans and schedules. Server-based, centralized program tools can also support online time tracking and resource monitoring. If you plan to take advantage of this, estimate the time required to set up the database and include it in your plans.

Also standardize your processes for status collection and reporting throughout your program. Use compatible formats for data collection, and coordinate project-level reporting with program reporting to ensure

consistency. If you plan to assemble status data online by collecting inputs using a high-end project management software tool, set up the information on activities, projects, resource categories, and other data in the database. To facilitate its use, provide adequate access and training for all program contributors.