Project Remedies' Solution Set's Ability to Transform your IT Organization

A Selection of Use Cases from Project Remedies Inc.
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Introduction

"Transformation" requires new technology and/or processes that helps users perform and think about their jobs a different way. Success requires you "measure what you manage." To reduce cost, organizations try to streamline processes and optimize resources. They usually fail for a variety of reasons. Often, they do not measure if the processes are streamlined or the resources are optimized. Project Remedies Inc.'s ActionProgram Manager Plus (APM Plus) is an enhanced process and life-cycle management system which is designed to operationalize enterprise-wide processes. APM Plus's robust template capability enforces discipline and consistency, and eliminates the need to train everyone in the enterprise on the process because the process is in the template. Each person just has to do the task assigned.

APM Plus includes process, project, program, portfolio, governance, resource, risk and cost management functionality. It uses work and approval templates to generate project plans. But it is not a replacement for MS Project. MS Project solves a different problem, i.e. managing large, unique projects. APM Plus's sweet spot is operationalizing common, repeatable processes. It uses project management functionality, because keeping track of when each task in the process is completed is one of the two key metrics. The other is "time spent." For example, if an acquisition package goes into Legal for a month, it is critical to know how much time was spent while it was in Legal. 1 hour? 5 hours? 150 hours? With both metrics, management can have a conversation about how to improve the process. Without them, they cannot have the conversation.

Because it runs on your existing Remedy platform and interfaces with the IT Service Management suite, it leverages your investment in Remedy and can be used for many different applications. This is the easiest, fastest, and least expensive way to create a demand management system that the whole organization can use. One benefit is the elimination of silos within and between organizations. Another is speeding up tempo and a third is improving service quality.

APM Plus allows you to be creative in selecting processes to operationalize and measure. For example, a Dev/Ops process could start in Development to track development of a new code. It could measure the tasks in a 2-week or 4-week Agile sprint, then track the tasks the code goes through in Test, and then manage the tasks the code goes through in Change and Release Management. It does not replace those applications; it measures performance across those applications. It would speed up the process and reduce the time necessary to put it into production.

With APM Plus implemented, task teams will be more successful, senior management will have the performance metrics that show if in fact processes have been streamlined, resources are being optimized and costs are lowered. Awareness will build customer confidence in the organization as it transforms to a cost conscious and customer-centric culture.

Use Case	Input: Trigger Event, Staff or Customer Request	Main User: Process	Output: Project Plans, Documents or Reports	End User/ Success Condition
1 Request Fulfillment: Complex Requests	General User. Requests for Services / Technology Using the Service Catalog.	**Service Desk Team Leader:** In response to a provisioning or complex fix request, APM Plus generates project plan automatically using pre-defined work process templates; identifies staff resources available and capable of response; people are assigned to project tasks; the assigned person is notified and works the task, statuses the task, enters their time against the task, and updates the related asset record. Requestor notified of request status automatically at key milestones. Performance Metrics of the task are captured. In Service Operations, templates insure consistency and high quality performance.	1. APM Plus Tasking and Enhanced Project Plan- *which includes:* *2. Staffing and Tasking Plan* *3. Resource Utilization Charts* *4. Gantt Charts* *5. Project Details Report* *6. Summary Reports* *7. Worker Time Reports* *8. Charge Back Reports*	Initial: the Customer receives more timely results. Performance by multiple performing organizations captured against consistent and repeatable processes tied to each complex service in the Service Catalog. Final: Performance Metrics on each of the projects, creating the potential for appropriate cost recovery from the User Organization SLA or charge back.
2 Cost Analysis of Each Service Request Cost Transparency	General User Requests for Services / Technology Using the Service Catalog.	**Contract Specialist:** Work on incidents, problems, changes, work orders, and projects, which are all generated from service requests, and other tasks not generated from service requests. The hours of work for each task are converted into real time costs in APM Plus. Each task cost is then aggregated to the requestor and his/her organization. Where the Service Level Agreement (SLA) allows or requires it, detailed charge back is sent to each organization for the work performed.	1. Actual Cost of Services by Customer Report	Initial: Capturing time, expense and asset cost against every type of task. Final: Model of expenses based on actual expenses to which can be used for planning, fee structures and Customer charge-back report connected to SLAs.
3 Project and Acquisition Portfolio Management	Senior Leadership needs to review and approve Portfolio Projects and/or Planned Acquisitions	**IT Portfolio Manager:** The proposed project is checked against the appropriate IT Portfolio for redundancy then added via APM Plus into their Project /Acquisition Portfolio. The Project is subjected to Portfolio Analysis using multiple criteria that may include (but is not limited to): Risk, Cost, Budget Impact, Project Maturity, Likelihood of Completion, and Mission Value. The Portfolio Analysis Ranking is submitted to the appropriate Governance Group for final decision and disposition. If approved, the project in the APM Plus Portfolio is expanded into a full project plan in APM Plus. After approval, the project is tracked in APM Plus. An acquisition work template is used to generate the project plan, the person responsible is notified, people are assigned to tasks, the plan is approved and the project starts. People work the tasks, status the tasks and enter their time against the tasks.	1. Project /Acquisition Portfolio with integrated criteria based Decision Capability 2. Project Plans for Approved Elements of the Portfolio	Initial: Project Portfolio with full data set. Final: Integrated project life-cycle: • Management able to see if what was delivered is what was promised • Cost tracked in the Project Life-Cycle. • Senior Management able to see the status of any project at any time.

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4 Acquisition Management	Acquisition Officer uses APM Plus to plan, organize and manage each acquisition request	**Contract Specialist:** Uses the appropriate acquisition template in APM Plus to create, plan, identify and assign resources, document, track cost and manage Technology Acquisition process. Performance metrics of the acquisition are captured. Documents related to each acquisition task are captured and connected to the task.	1. Acquisition Project Plan for a New Technology 2. Repository of Acquisition Documents for each related task in the plan	Initial: Project Plan for the Acquisition in an Acquisition Portfolio in a consistent and repeatable processes. Final: Executed Acquisition with full documentation and performance metrics for each step Administrative performance costs of the acquisition.
5 Enhance Remedy Change Management	Change Request is launched	**Team Leader or Change Manager:** There are multiple approaches to this use-case: 1. One client uses APM Plus within the change life cycle to better track when the work involved with the change will be completed. 2. Another client replaced the bulk of Change Management with APM Plus because it saved their most technical people's time, enabled them to better communicate with the customer and show the customer how busy they were, and capture cost,. Before implementing APM Plus, Team Leaders (Sr. Engineers) would define the tasks to be performed for each change request in Change Management and then create a project plan in MS Project using the same tasks. As people worked the tasks, the Team Lead would update MS Project. And with all that work, they could not communicate how busy they were to their customer and did not capture cost. 3. A third client used APM Plus predominately for Development projects. They launched change requests from project tasks whenever Operations had to perform a change.	1. Change Management Tracking System 2. Project Plans for each change in APM Plus or MS Project. 3. Project Details Report 4. Performance Metrics	Initial: Integrated Change Management Tracking System providing visibility. Final: Change Management Process with more changes completed on time and on budget, and less re-work.
6 Cybersecurity Incident / Event Remediation Management	Automatic capture from Event Management System or manual entry of Cybersecurity Incident or Event	**Cybersecurity Operations Center Analyst:** After a cyber incident is captured in PRI's Cyber Manager (either automatically or manually, 1) mandated notifications are automatically sent and logged in an Audit log field and 2) the Cybersecurity Operations Center Analyst is notified and reviews the incident. The Analyst looks in Remedy Asset Management for information about the affected asset, looks in Identity Manager for information about the people involved, and decides on a remediation approach. He selects the appropriate pre-defined work template in APM Plus and sends it for approval. When approved, the people involved work the tasks, status the tasks, enter their time against the tasks, and updates the related asset record. **This process is compliant with the requirements specified in NIST Special Publication 800-61 Release 2 on Incident Management.**	1. Remediation Project and Tasking Plan 2. Remediation Cost Report 3. Unimpeachable Forensic Document Repository	Initial: Cyber Response Team is able to provide timely and measured remediation of the intrusion compliant with JCS Instruction 6510.01F on Information Insurance and Support to Computer Network Defense and compliant with NIST Special Publication 800-61 on Incident Handling. Automatic notification to all involved parties. Service Desk team has ongoing visibility into the status of each remediation effort. Customer service improved with improved communication. Final: Performance Metrics and Costs of each Remediation Project.

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7 Governance	Funding Request that needs Sr. Management and other Executive's Approval	**Governance Committees**: Proposed project documentation entered into APM Plus, including business case, high-level resources estimate (people, assets and expenses), budget and priority. Multiple stage-gate approval process: 1. Approved by executive of the organization that defined the project. 2. Approved by all of the executives necessary before it goes to the Steering Committee. 3. Steering Committee tentatively approves a budget and asks for a project plan that outlines how the monies will be spent. Project plan generated, tasks are staffed, planned cost is calculated based on the staffing, and plan is reviewed and approved ultimately by Steering Committee. Project starts. People work the tasks, status the tasks, enter their time against the tasks and update the related asset records. Project status is reviewed whenever necessary. Lessons learned are detailed after completion.	1. Project Definition, Business Case. Budget, and Priority Captured 2. Flexible Multi - Stage Gate Governance Approval Process 3. Project and Tasking Plan 4. Reports for Review Phase	Initial: Governance Committees receive requests in common format with nominal business case, project plan, detailed budget and relevant documentation. Final: Complete project life cycle managed: Analyze, Select, Control and Review in Compliance with DOD Directive 8115.01 on Project Portfolio Management. Gives senior management visibility into project detail at any time.
8 Software Development Life-Cycle Management. Agile Development	General User Requests for Services / Technology Using the Service Catalog.	**Project Manager / Team Leader**: An organizations software development life-cycle can be entered as pre-defined templates, insuring consistency and quality. Agile Development involves developing applications in small chunks called "sprints;" the work can be performed iteratively based on testing results and user feedback. While the terminology is different, the functionality in APM Plus is applicable. One scenario: each "sprint" is thought of as a "project" generated with a work template. Feedback with each iteration is documented and the next sprint can be performed and tracked by either changing the project plan one task at a time, or by using the same or another template to add more tasks to the project plan. The project plan can continue to expand as more functionality is added, or multiple project plans can be linked together using inter-project dependencies. Multiple projects can be grouped together and viewed on a multi-project Gantt chart. APM Plus includes two capabilities for viewing multi-project Gantt charts: a Program or a Pool. Time tracking is still performed and performance is still performed. Agile Development does not mean that dates do not have to be met, but that meeting dates is feedback based and iterative. APM Plus manages these types of projects too.	1. An Agile Development Project Plan. 2. Project Details Report. 3. Performance Metrics 4. Worker Weekly Time Report	Initial: Agile Project Plan with integrated user feedback requests from developers. Final: More projects are finished on time, fully documented and on budget.

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9 Dev / Ops Interface: Bug Fix or Enhancement Request Management	Bug or Enhancement Request is submitted via the Service Catalog.	**Service Desk Analyst:** Identifies and requests an enhancement or a bug fix. The request is assigned to the **Change Control Board (CCB).** The CCB approves the fix and the "bug fix project plan template" is used to generate the project plan. The plan requires all the steps of any small development project including the steps necessary for implementation into Production. The people in Development are tasked and the tasks are worked. Milestones are reached and approved. Documentation is prepared. The last task is to "implement the change" which is done in Operations. Automatically from the project task, using workflow, a change request is created in Change Management and the person in Operations responsible for implementing the change is notified, implements the change and closes the change request. Automatically using workflow, when the change is closed, the last entry in the project plan is closed, the project record is closed, the original request is closed, and the requestor is notified of the completion.	1. Bug Fix Project Plan 2. CCB Documentation 3. Change Management Documentation 4. Project Performance Metrics	Initial: Rapid turnaround and implementation of bug fixes and enhancements with careful configuration control of CCB. Final: Change Management Documentation Captures time spent on tasks performed by Development personnel.
10 Network Services Projects	Network Engineering. Request to expand / enhance the Network	**Network Engineer:** creates a project plan using one of several predefined work templates in APM Plus, identifies staff available with the right skills needed accomplish the project. Project budget calculated. Project plan and budget approved. People assigned notified; they status the task, enter their time against the task and update the related asset record. Upon project completion, notifications are automatically generated by the APM Plus sent to designated stakeholders.	1. APM Plus Project Plan and addition Reports	Initial: Robust Project Plan with planned times and costs for both Senior Engineer and the Network Engineer Final: Ongoing Real-time Performance Metrics and Costs of the Project, as well as Budget Fidelity.
11 Test Engineering Planning and Execution	Test Engineer creates a Test Plan for a New Technology	**Test Engineer:** creates test plan using one of the several test work templates in APM Plus. He identifies staff available with the right skills needed accomplish the project. He tasks the staff. The Testing Project is executed and all documents related to the test are attached to the correct test task repository	1. Testing Plan 2. Project and Staff Plan for Test Plan 3. Testing Results Document Repository	Initial: Test Plan and Project Plan for Implementation the Test. Final: Performance Test Metrics and Performance Test Documentation.

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12 Ad Hoc Projects to Support Enterprise Initiatives	Unforeseen Significant Problem Identified while Implementing Enterprise Initiatives	**Project Management Office (PMO) Manager:** APM Plus includes functionality that enables reaction to unforeseen events. 1. Templates can be added to existing project plans. This allows for iterative development and also for significant changes to an existing project. 2. Inter-project dependencies. If it makes sense to create a separate project plan to manage the unforeseen event, inter-project dependencies can be used to link the two projects together. Multiple projects can be grouped together as a "program" or a "pool" and viewed together on a Gantt chart. 3. APM Plus includes its own "change process" for adding tasks and or dependencies, for changing the due date of a task or adding budget to a task. This is used for smaller changes to the project.	1. APM Plus Project and Tasking Plan 2. Automated Approval Workflow 3. Fix Project Performance Metrics	Initial: The Enterprise Project is fixed in a cost effective manner with little or no impact on the Project Timeline. Final: The Enterprise Project budget is accurately updated.
13 Automated Provisioning Management	Request from user for creation of new email address started.	**Automated process Initiated by Help Desk:** When the process to provision a new email address for example is started, using a pre-defined work template and Remedy workflow, APM Plus generates an automated multiple step process in the form of a mini-project plan. As each step in the process to create a provisioned capability finishes, using workflow, the status of the related task in the project plan is automatically changed to Completed. If a step does not finish successfully, the status of the task in the project plan is changed to "In Process," the person responsible for that step is automatically notified of the problem, and the Service Desk is automatically notified. When the step finishes successfully, the task status is changed to Completed. This continues until the provisioning is completed. No people are involved in this process except, if a fix is needed.	1. Project Execution Record 2. Notification Emails 3. Error Reports	Initial: Automated Provisioning of Email and Notification. Final: Auditable trail and immediate notifications to all affected parties. Metrics captured determining if process is improving or not.
14 Managing Scheduled and Unscheduled Asset Outages	Planned Network Upgrade	**Asset Owner:** For each asset or class of assets, a scheduled or unscheduled outage plan is set up. Then, 5 days before the first task in the plan should start, a mini-project plan is generated and the person responsible for the asset is notified automatically. The plan includes the tasks to be performed before the asset comes off-line and the tasks to be performed after the asset comes off-line. He/she assigns people to each task in the plan, and these assignments are posted to each person's Console. Each person works his/her task when notified to do so, statuses the task, enters time against the task and updates the related asset record.	1. Network Shut Down Project Plan 2. Notification Emails 3. Issues for AAR	Initial: Smooth planned shutdown. Final: AAR and metrics of the out ages, implementation of the upgrade.

Use Case	Input: Trigger Event, Staff or Customer Request	Main User: Process	Output: Project Plans, Documents or Reports	End User/ Success Condition
15 Requirements Management	Request for new application or capability.	Project Manager. After the Requirements are defined and approved, then a project plan is created. (The project plan may go through another approval/decision cycle) and the project begins. The Baseline Requirements and any subsequent changes are maintained in the Requirements Template as the development tasks are tracked. Any changes in the Requirements generate automatic notifications to all of the project staff, so there are no surprises or lost development efforts. Actual development costs are captured to insure that the project stays within budget and schedule. When development is completed, including documentation, an Acceptance Change Request is automatically generated. The documentation is put into a Remedy module for use by the Service Desk. If the Project is internal, the application is put into the Service Catalog. The application is put into Production. New on-going support and maintenance costs are captured as part of the cost of the project lifecycle.	1. Project Charter and other documents. 2. Preliminary budget. 3. User and administrator documentation for each application. 4. Requirements Template.	Initial requirements are part of the final product put into production.
16 Manage Internal or External Audits	Request for audit of unit or agency	**Financial Manager:** Chooses the appropriate preloaded audit plan (work) template in APM Plus to create a project plan, identifies the audit team (internal or external) based on availability and assigns people to the tasks. Appropriate notifications are automatically sent to key audit stakeholders as audit milestones are accomplished, interim and final audit documents are attached to the proper task. Performance metrics are collected, and lessons learned are captured.	1. Audit Project Plan 2. Archived interim and Final Audit Documents 3. Lessons Learned connected to Audit Templates	Initial: Audit Report delivered in timely manner Senior management has visibility as audits process Final: Transparent and tightly managed Audit Process that improves with experience Lower cost of audits.
17 Command Cyber Readiness Inspections	Notification of Impending Cybersecurity Readiness Inspection	**Cybersecurity Operations Leadership**: All related work is organized and viewable in one place, the APM Plus Portfolio View. When the inspectors arrive, the command can show them all active and closed incidents, active projects, proposed projects. With three clicks, the user can drill down to the task detail on any project. Steps for meeting deficiencies, i.e. for bringing the Command into compliance, are easily and quickly entered into APM Plus.	1. Cyber Action Manager Incident Archive 2. Cybersecurity Readiness Inspection Project Plan 3. Cybersecurity AAR	Initial: Cybersecurity Readiness Inspection Preparation Plan. Final: Fully documented, reviewed Cybersecurity Readiness Inspection Preparation Plan and plan for getting into compliance.

"*The Swiss Army Knife of Project & Portfolio Management Systems*"

The Benefits of Using Project Remedies' Solution Set

1. Efficiency gained by streamlining consistent, repeatable processes within and between organizations.
   a. Silos eliminated within and between organizations.
   b. Improved tempo.
   c. Communication between organizations such as Development and Operations (Dev/Ops) operationalized.
2. Improved, more responsive customer service.
3. Customers, Senior Leadership and project managers have confidence that the information they are looking at is valid and accurate. Transparency.
4. Creates a Culture of Accountability. : People know what they are supposed to do, when they are supposed to do it, and how much time they have to complete the work, and then management can see if the work was completed, when it was completed and how much time was spent completing the work
5. Lower Cost.

Bottom Line: More Projects Finish On-time and On-budget

Summary

Project Remedies' ActionProgram Manager Plus (APM Plus) is the Remedy-based integrated process and life-cycle management system that can provide process, project, program, portfolio, governance, resource, risk and cost (time and expense tracking) management functionality. These Use Cases demonstrate the versatility of APM Plus to be a transformative technology that enables a wide array of processes across the Enterprise. It gives your organization the freedom to quickly implement and capture the metrics for all types of processes. The PRI Solution Set, which has a simplified integration process into legacy BMC Remedy System, is implemented in days, can be the catalyst for such change.

APM Plus solves a different problem than the typical project management system. Project managers normally focus on one project, their project, and they use a project management system to capture every detail being worked. Sometimes, we are asked if APM Plus can handle 1,000 tasks or 3,000 tasks. That is how a project manager thinks about their project; in that level of detail. (The answer is "no" by the way.)

APM Plus on the other hand is used by managers who are managing hundreds of projects which should be performed in a consistent, repeatable manner. These managers want to see 5 – 10 – 20 tasks under each milestone. A Gantt chart at that level of detail is understandable. Looking at a project plan with 500 or 1000 tasks is not and takes too long to understand.

Besides, like other Remedy-based applications, APM Plus is a distributed system, i.e. tasks are assigned to people to work and status. If the project plan is in too much detail, the people working the tasks will complain that they are spending so much time statusing the tasks that they cannot get their work done. Defining a process at the "right" level is the key to a successful APM Plus implementation.

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Appendix A – The Project Remedies Inc. Solution Set

All PRI applications are built utilizing the BMC Remedy Action Request System. Besides leveraging investment in Remedy, this adds workflow functionality as well as the easy integration with existing Remedy-based applications enabling for more efficient processes and the ability to manage other applications that other project management systems cannot do.

Enterprise Management

- **ActionProgram Manager Plus (APM Plus):** The "Swiss Army Knife" of project management provides process, project, program, portfolio, governance, resource, risk and cost management functionality. APM Plus creates a variety of Project Management Workflows, Project Aggregation and Costing Matrices.
- **MS Project Interface**: Allows the easy transfer back and forth of data between APM Plus and Microsoft Project

Cybersecurity

- **Cyber Action Suite (CAS)** (*Supports DHS CDM Functional Tool Areas 1-11*)
    - **Cyber Manager:** Provides for automatic capture and or manual entry of cyber incidents and events
    - **Identity Manager:** Provides information to the Analyst about each person, the roles they play, their credentials, training, and clearances
    - **BMC's Asset Management:** Provides repository of information about each asset for analysis of authenticity and even assess impacts form breaches
    - **ActionProgram Manager Plus (APM Plus):** Gives analyst an easy way to automatically generate remediation mini-project plans, notifies the people involved and tracks and manages each step in the plan