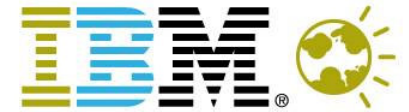


Session 3 : Rational

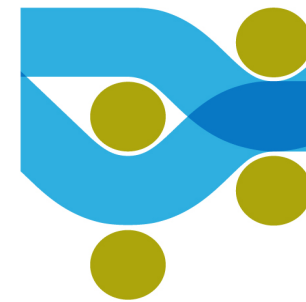
Nicolas Berney
Rational Account Manager

Christophe Tournier
Rational Consultant



**Smart Decisions for
a Smarter Planet**

LEARN NEW IDEAS TO STAY AHEAD
OF THE MARKET!



Planification et gestion de projet
avec un seul outil :
Rational Project Conductor

1 IBM Software Solutions Day

vous faire connaître les dernières évolutions de l'offre software



650 Collaborateurs IBM pour vous aidez en Suisse Romande

5 Familles de produits: **Tivoli**, **WebSphere** et **Rational** pour la fondation d'architecture services « SOA », **Information Management** pour la gestion des données et finalement **Lotus** pour la collaboration.

Smart Decisions for
a Smarter Planet

LEARN NEW IDEAS TO STAY AHEAD
OF THE MARKET!



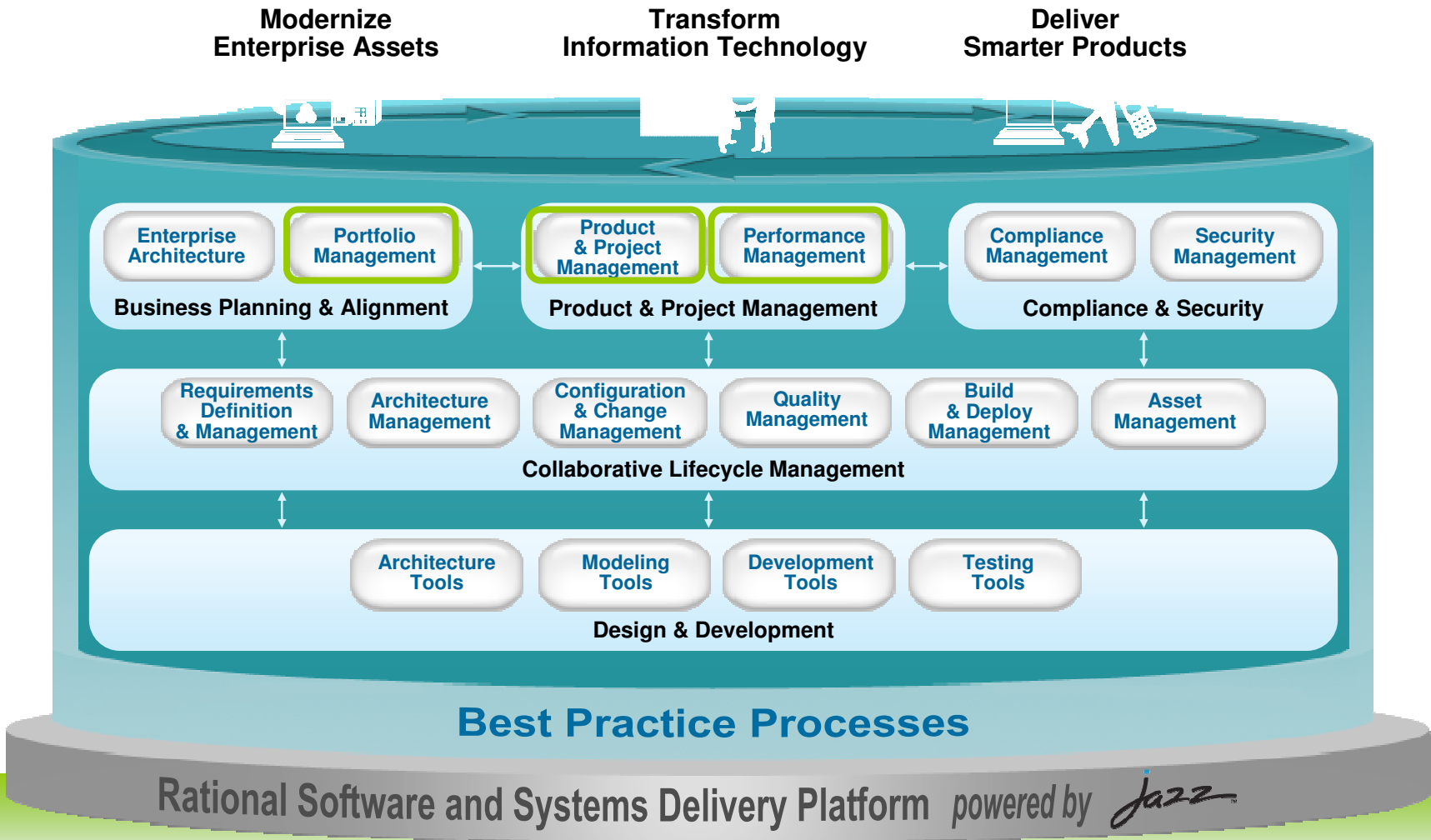
Agenda



- **IBM Rational – Jazz**
- **Project Portfolio Management**
Focal Point
- **Project Execution**
Project Conductor → Demo
- **Resources**



IBM ALM Rational software solutions



IBM and Business Partner Ecosystem



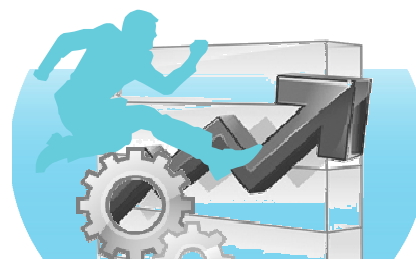
IBM Rational Jazz framework

Lifecycle collaboration, powered by automation to govern software quality



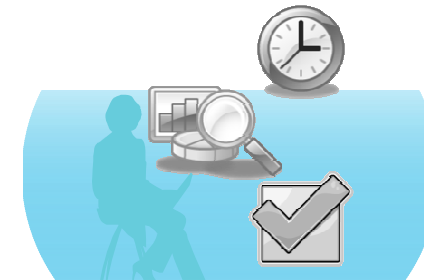
Collaborate

Collaborative, continuous, and comprehensive information sharing



Automate

Automating labor-intensive activities and increases predictability



Report

Dynamic information to manage the software quality and to take informed actions

jazz TEAM SERVER



Agenda



- **IBM Rational – Jazz**

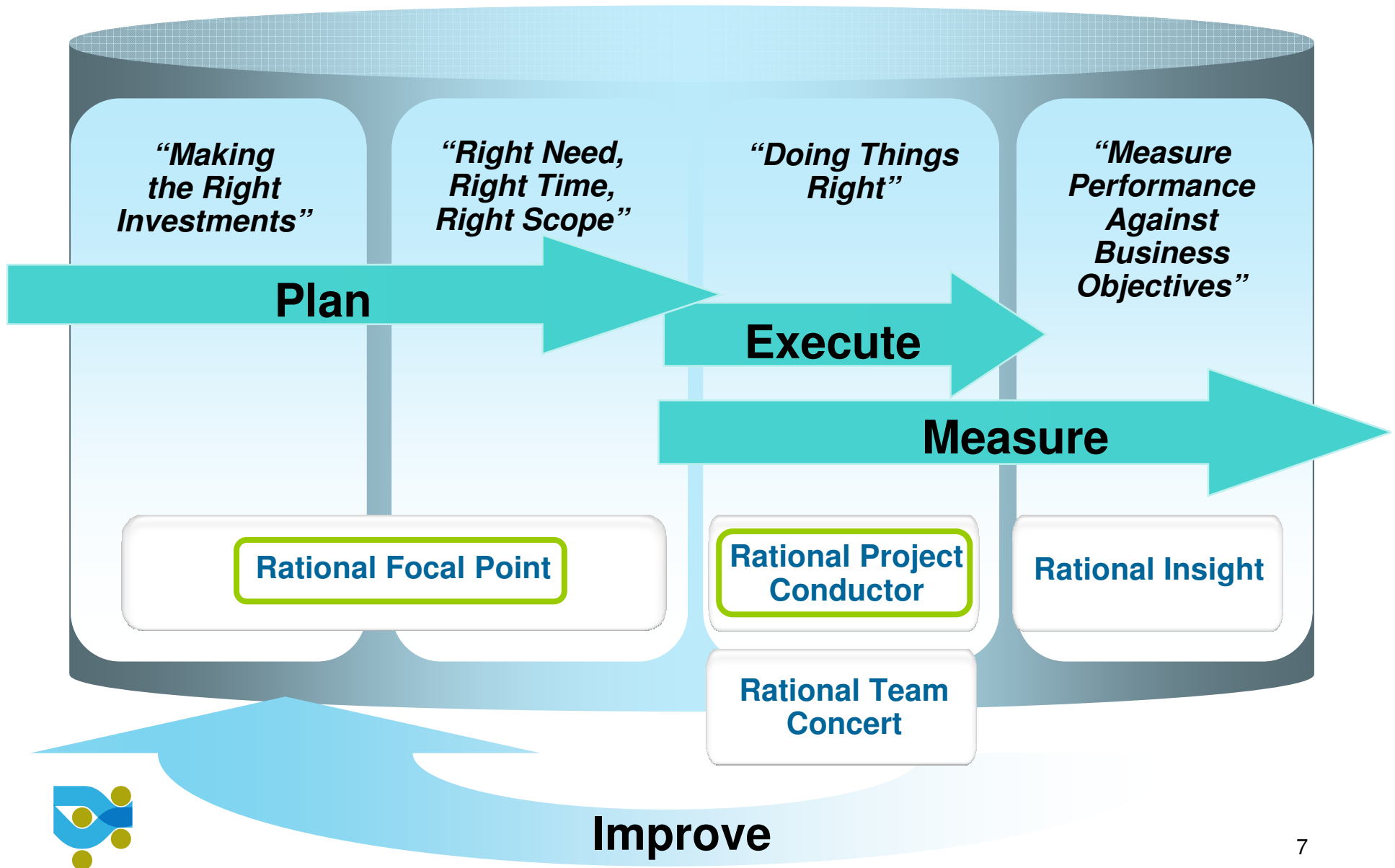
- **Project Portfolio Management**
Focal Point

- **Project Execution**
Project Conductor → Demo

- **Resources**

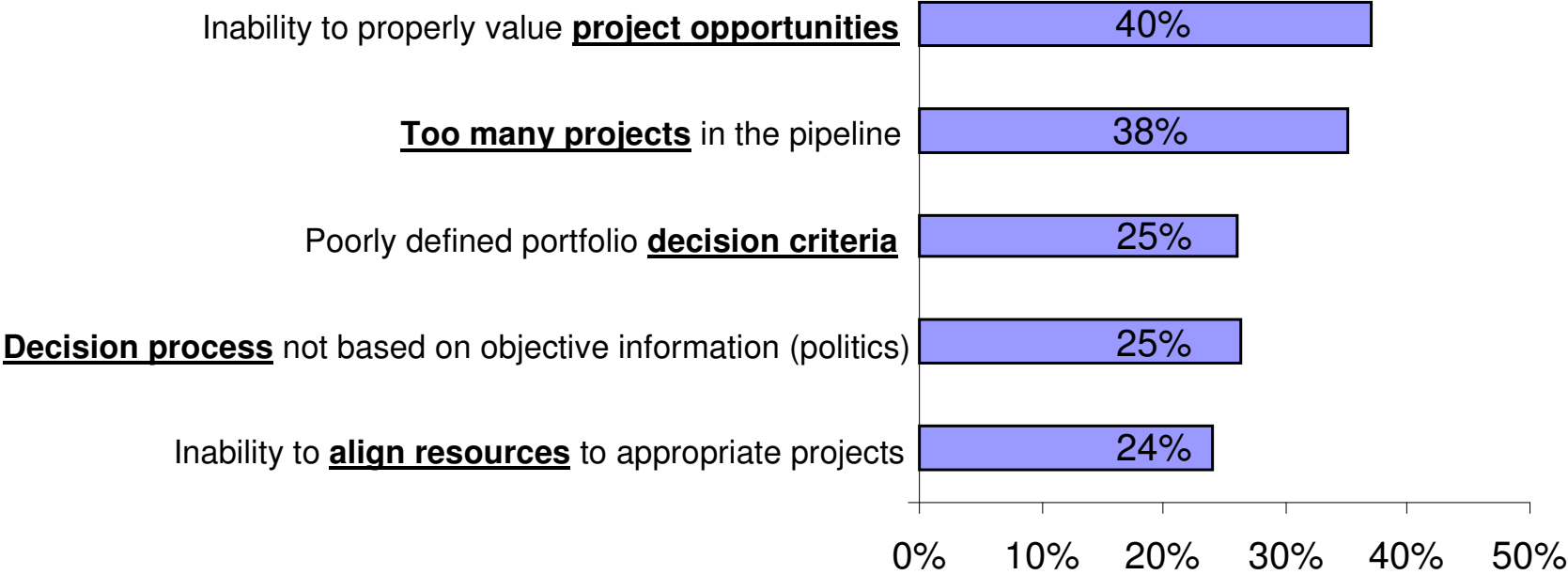


IBM's Project, Portfolio and Performance Management





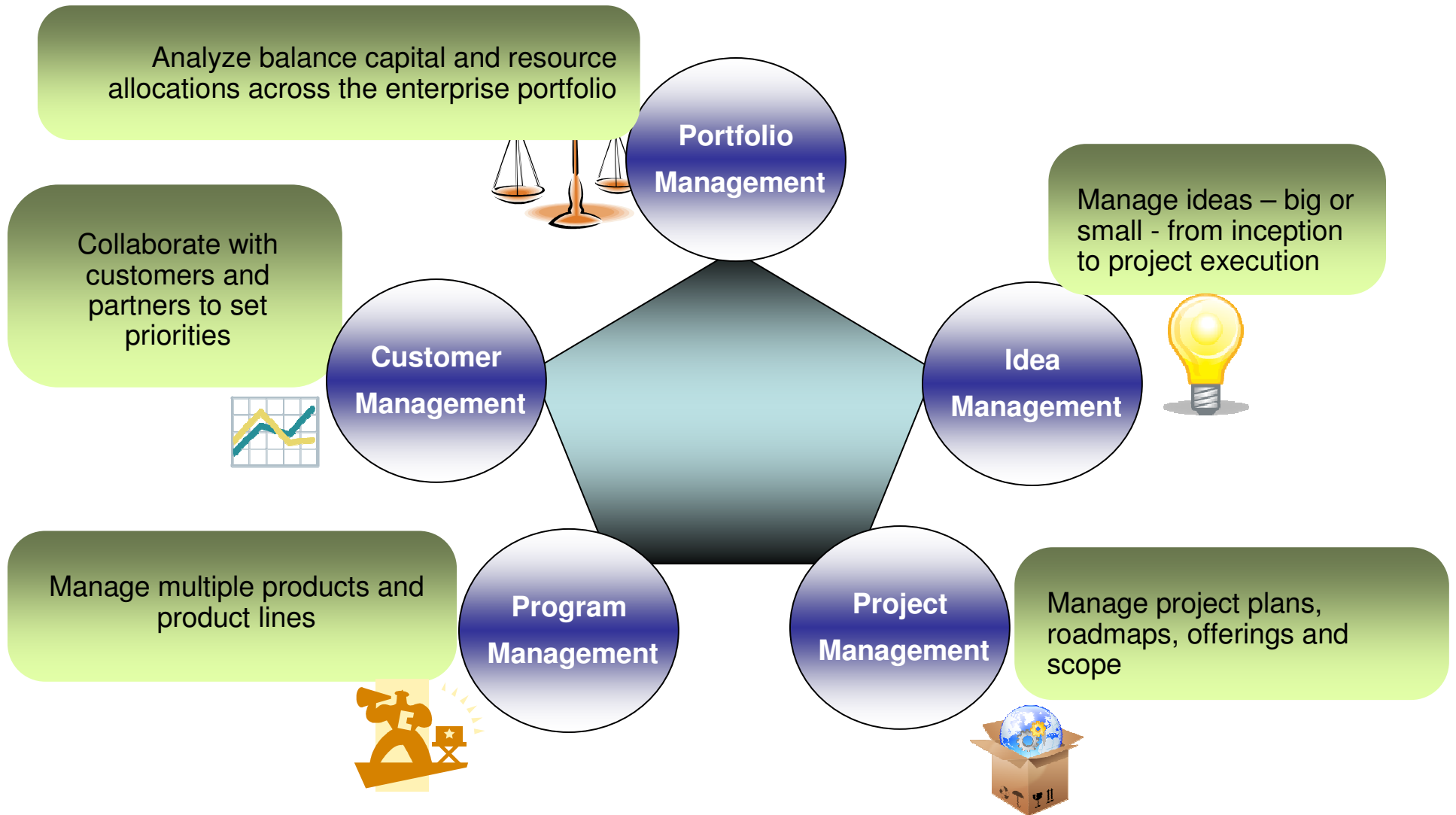
Top Challenges of Improving Project Portfolio Management



Source: [AberdeenGroup](#), August 2009



Project Portfolio Management – Best Practices



Project Portfolio Management with IBM Rational Focal Point



Capture High Level Requirements

- Approval processes



Value-Based Selection

- Decision support – prioritization



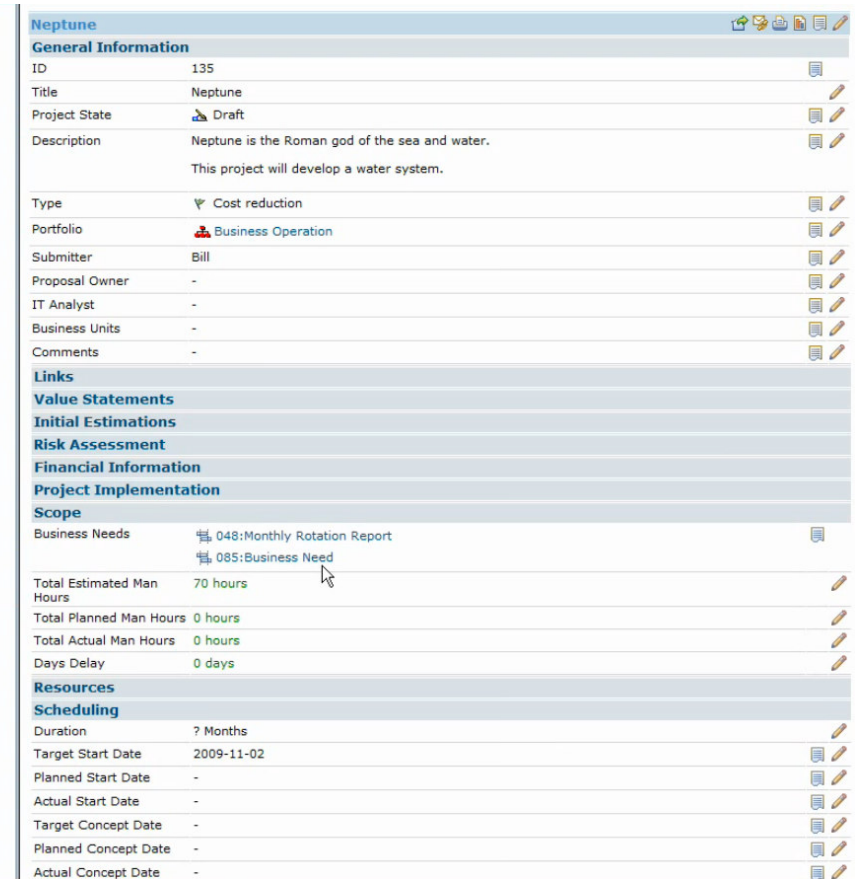
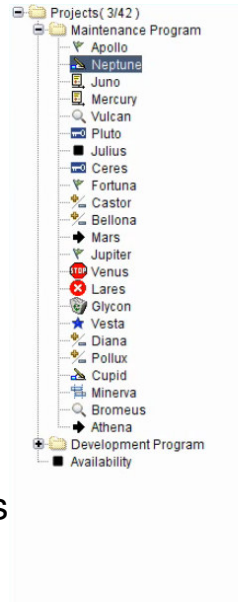
Project Investment Visibility

- Manage and monitor your investments
- Release management



Collaboration

- Full web-based collaboration with customers and internal users



IBM Rational Focal Point - Dashboard



Workspaces | Home | Preferences | Admin | Help | Log Out

IT Portfolio Management Configuration Add On v1.0

Portfolio Financials

Title	Accumulated Investments	Total NPV - Ongoing Projects	Projects - Budgeted Benefits	Projects - Planned Benefits	Projects - Actual Benefits	Projects - Budgeted Expenses	Projects - Planned Expenses	Projects - Actual Expenses
Business Operation	\$5 125 000	\$2 375 921	\$15 759 000	\$18 093 900	\$10 069 700	\$11 716 300	\$11 132 000	\$16 192 700
Infrastructure	\$12 020 000	\$-2 002	\$18 480	\$10 355 480	\$0	\$20 670	\$10 875 230	\$0
External Applications	\$0	\$0	\$0	\$0	\$0	\$0	\$0	\$0

Projects with Overrun Planned Expenses

Title	Project State	Portfolio	Planned Expenses Overrun
Apollo	Approved for implementation	Business Operation	
Epsilon	Approved for implementation	Business Operation	
Lambda	Approved for implementation	Business Operation	

Portfolio Health

Title	Project Expenses Overrun	Red Lights in Ongoing Projects	Open High Priority Issues	Portfolio Level Risk Score	Project Level Risk Score
Business Operation					
Infrastructure					
External Applications					

Strategic Objectives

Title	Importance
Strategic Objectives	

Deviation Expected vs Actual

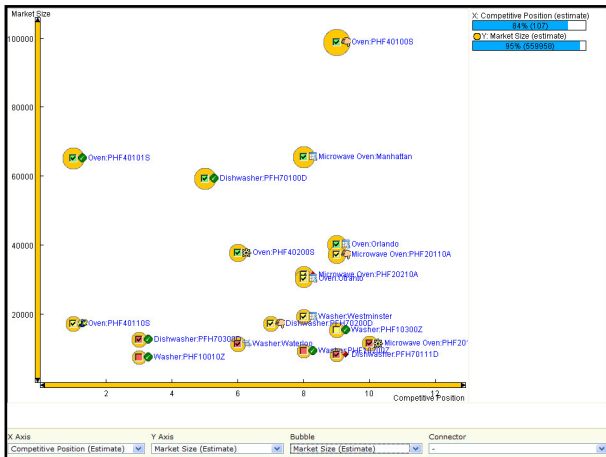
Title	Deviation Benefits (%)	Deviation Expenses (%)
Business Operation		

Project Distribution: State

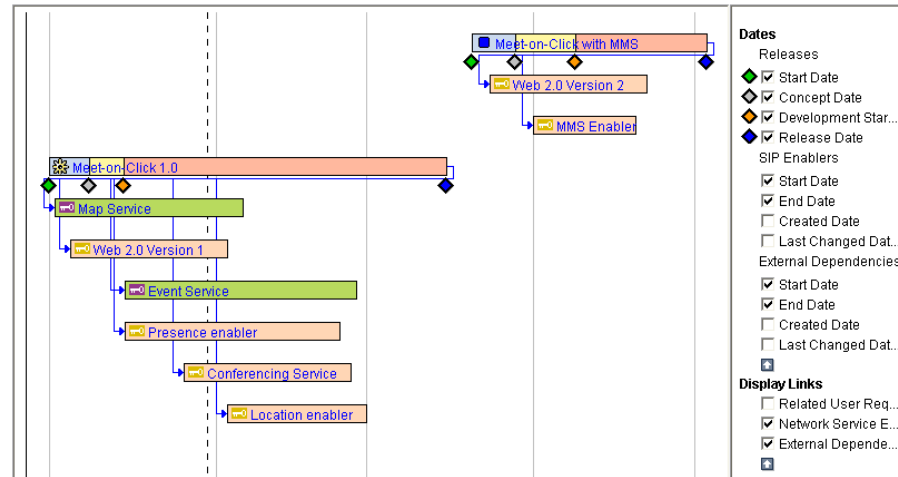
Project State	Quantity	Share
Draft	2	4,8%
Proposed	0	0,0%
Accepted	1	2,4%
Under investigation	2	4,8%
Finalize business case	3	7,1%
Ready for approval decision	0	0,0%
Ready for prio	6	14,3%
Pre-plan project	1	2,4%
Ready for implementation appro...	2	4,8%
Approved for implementation	7	16,7%



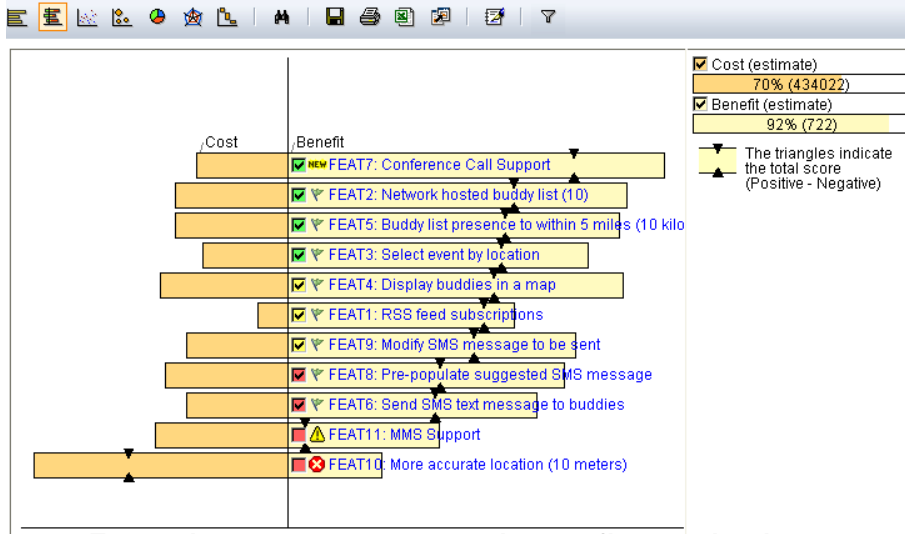
IBM Rational Focal Point - Report



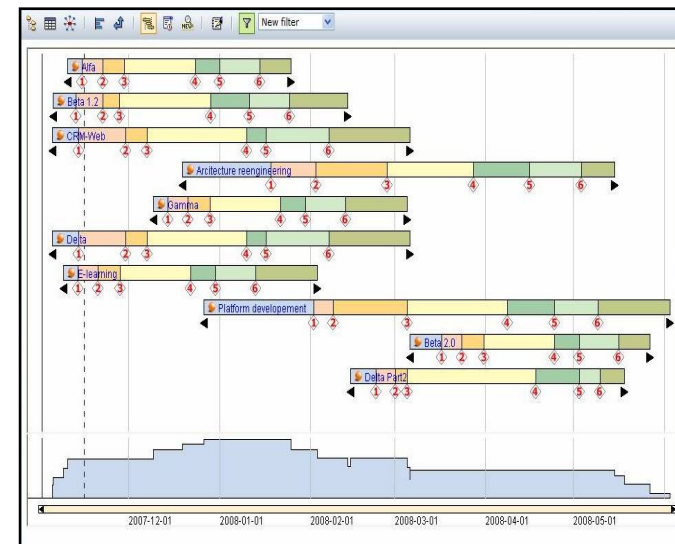
4 dimensions bubble chart



Roadmap with identification of dependencies



Requirement cost vs. benefit analysis



Resources utilization



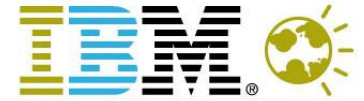
Agenda



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Project Execution - the continuing challenge



- Collaboration with a global distributed teams
- Select the "right" method and process
- Match project demand with resources
- Get project status
- Managing constant change

"If your management tells you to do a project on Time, on Cost and In scope, just tell them that the project will fail..."



IBM Rational Project Conductor Features



Web client interface

Project Management

- *Project Planning & Execution, Gantt Chart*
- *Effort and Duration Based Scheduling and Tracking*
- *Support for Agile & Traditional Projects*
- *Task dependencies and constraints*
- *Creation of Projects from Templates*
- *Simple algorithm for Scheduling*
- *Time Reporting*
- *Risk Management*
- *Project Dashboards*
- *Basic Project Finance - Defining Resource Rates and Managing Budgets and Costs*

Basic Program Management

- *Program Definition*
- *Project inter dependencies*
- *Program Dashboards*

Scope Management - CRs, Requirements, Defects (CRD)

- *Basic CRD Definition*
- *Scheduling and execution of WBS elements associated with CRDs*

Resource Management

- *Resource Pools / Competencies*
- *Resource Allocation across projects*
- *Resource Assignments to Tasks*

Integrations

- *Integration with RTC2.0*
- *Analytical Reporting through Rational Insight 1.0*
- *MS Project XML Import – Export*
- *Integration with Focal Point*
- *Integration with Document Management Systems*
- *Integration with Third Party estimation tools*

Document Management

- *Basic document storage capability*

Customization

- *Custom Views /Fields*

Infrastructure

- *Web UI, LDAP, Role based Security*



Manage all projects in a single location



- Manage cross-project dependencies
- Analyze cost, scope and time to completion inputs to capture risks
- Enable “collaboration in context”

Rational Focal Point for Project Management

Your Trial License expires in 48 days | fryerk | Log Out

Work Resources Timesheets Administration

Create Program

AccountManager

Overview Schedule Details Risk Baselines Financials New tab

Timescale: Week

Start (Exp)	Finish (Exp)	Duration (Exp)	Effc	Sep 21, 2009	Sep 28
Jul 29, 2007	Dec 18, 2008	365 d			
Sep 22, 2009	Sep 22, 2009	1 d			
Sep 14, 2009	Dec 24, 2009	102 d			
Sep 16, 2009	Dec 24, 2009	72 d			
Sep 23, 2009	Sep 25, 2009				
Sep 25, 2009	Sep 25, 2009	1 d			

Rational Focal Point for Project Management

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Work Resources Timesheets Administration

Create Program

AccountManager

Search and Assign Queries Pools

Name	Actions	Role	Start Date	End Date	Duration
fryerk		project-lead	Sep 16, 2009	Dec 24, 2009	72 d
marco		project-lead	Sep 16, 2009	Dec 18, 2009	68 d
deb		team-member	Sep 16, 2009	Dec 18, 2009	68 d
bob		team-member	Sep 16, 2009	Dec 18, 2009	68 d

Only one repositories for project and resources



Align the right resources to the right role

Optimize resource management



- Identify resources based on skills, competency, and availability across the portfolio
- Assign resources to a project work elements

The screenshot displays the Rational Focal Point for Project Management interface. The main window is titled 'Resource View' and shows a 'Resource Query Editor' with a table of resources assigned to the 'Payroll App' project. The table includes columns for Name, Role, Start Date, End Date, Duration, Effort, Tasks, Cost rate, and Selling rate. Below the table, there is a 'Resource Assignment' section with a list of resources and their roles.

Name	Role	Start Date	End Date	Dur.(d)	Effort(h)	Tasks	Cost rate	Selling rate	Actions
ProjMgr	default	8/15/08	9/24/08	41	328	0			
QualityChampion	default	2/8/08	2/12/08	7	56	0			
Dev & RE	default	5/20/08	5/20/08	1	8	0			
RE	default	5/23/08	5/23/08	1	8	0			
Dev & RE	default	7/14/08	7/14/08	1	8	0			
RE	default								
Laurel	default								
Customers	default								
Laurel	default								
RE	default								
ProjMgr	default								

The interface also shows a 'Work Breakdown' tree on the left, listing various project elements like 'Financials', 'Payroll App', 'Development', and 'Transition'. A secondary window titled 'prototype UI' is open, showing a 'Search and Assign' dialog with a table of resources and a 'Include Availability Information' dialog box.

All the resources are known across the portfolio



Managing risk by securing project delivery

Multi-faceted risk management and mitigation



- Manage execution risks across several dimensions
- Track probability, severity, priority, mitigation activities
- Develop schedule buffers to overcome poor mitigation plans

The screenshot displays the Rational Focal Point for Project Management interface. The main window is titled 'AccountManager' and shows a risk management view. A table lists risks, with one entry for 'trademark infringement' (Risk ID 165) identified on Sep 23, 2009, categorized as 'Legal' with an owner 'frye'. Below the table, a 'Details for trademark infringement' section includes a risk matrix and various attributes.

Risk ID	Name	Identification Date	Occurrence Date	Risk Category	Owner
165	trademark infringement	Sep 23, 2009		Legal	frye

Details for 'trademark infringement'

Risk Matrix:

Probability \ Impact	20	40	60	80	100
100	Green	Yellow	Orange	Red	Red
80	Green	Yellow	Orange	Red	Red
60	Green	Yellow	Orange	Red	Red
40	Green	Green	Green	Yellow	Yellow
20	Green	Green	Green	Green	Green

Attributes:

- Risk Category: Legal
- Impact: 80
- Identification Date: Sep 23, 2009
- Probability: 40
- Occurrence Date:
- Precision: Low
- Owner: fryerk
- Consequence Cost: 1,000,000.00
- State: New
- Probability Cost: 400000.00
- Priority: High
- Exposure: 0.32

Analyze the impacts and
prioritize the risk



Defining and tracking work where it's done



Integrate and direct flow of information up and down the lifecycle

- Decompose high-level requirements into lower-level tasks
- Task status are directly handled by the team within the context (Eclipse, Visual Studio, Web, ...)
- When needed, provide time sheets to internal and external teams

The screenshot displays the Rational Team Concert Work Items interface. The main window shows the details for 'Task 167' with a summary of 'prototype UI' and a state of 'New'. The 'Details' section includes fields for Type (Task), Severity (Normal), Found In (Unassigned), Creation Date (2009-09-23 9:38 PM), Created By (f.yerk), Project Area (AccountManager), Filed Against (Unassigned), Tags, Owned By (Unassigned), Priority (High), Planned For (Iteration_1), Estimate (3 d), Time Spent, and Due Date (2009-09-25). The 'Description' field contains the text 'create initial prototype'. Below the task details, there is a 'Quick Information' section showing 'Subscribers (1): f' and 'Parent: 166'. At the bottom of the main window, there are tabs for 'Overview', 'Links', 'Approvals', and 'History', and a 'Team Advisor' button.

Overlaid on the bottom right is a 'Resources' window showing a 'My Timesheet' for the week of 7/26/09 - 8/1/09. The timesheet table is as follows:

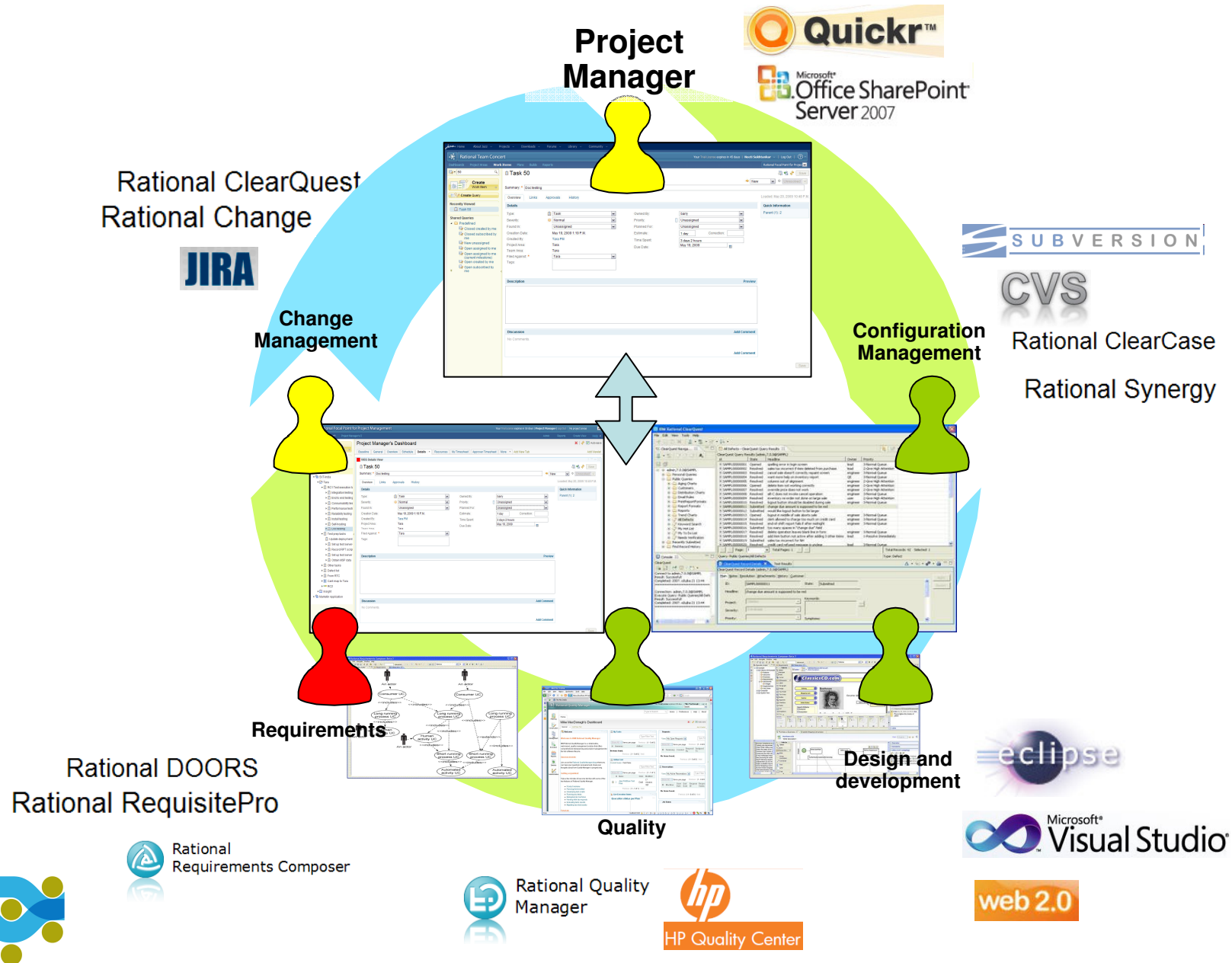
Tasks	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Total	% Complete	Additional Effort	Timecode	State
Summary Task_1	0	8	8	8	8	8	0	40		0	0	Unsubmitted

Below the timesheet table, there is a 'Description' section for 'Summary Task_1' with input fields for 'Actual Start' (7/27/09), 'Actual Finish', 'Actual Work' (40), 'Planned Start' (7/27/09), 'Planned Finish' (7/27/09), 'Planned Work' (1), 'Remaining Work' (0), and '% Work' (100). There are also text areas for 'Submitter Notes' and 'Approver Notes'.

No more chasing project & task status



Integrates with team collaboration systems





Demo: Rational Project Conductor



Agenda



- **IBM Rational – Jazz**
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Resources

<http://jazz.net>

- **Video:** Demonstration to show the link between portfolio management with the project execution:
 - <http://jazz.net/library/video/354/>
- **Video:** IBM Rational Project Conductor overview
 - http://publib.boulder.ibm.com/infocenter/repmlhelp/v1r0m0/index.jsp?topic=/com.ibm.rational.epm.product.tour.toc/topics/epm_tour_launchpoint.html
- Managing the Innovation Portfolio - Aberdeen Group 2009
 - <http://www.aberdeen.com/summary/report/benchmark/6097-RA-product-innovation-portfolio.asp>



Conclusion



Collaboration between project planning and execution is key to project success

- *Planning*: Rational Focal Point
- *Execution*: Rational Project Conductor

