PART B

Programs, Projects and Portfolios (P3)

zeno.pm

Get started minutes

QUICK START GUIDE

Estimate completion time
30 Minutes

1 **PROJECT HIERARCHY**
Understand how Zeno.PM handles project hierarchies

2 **PROGRAMS**
Add a program hierarchy to allocate projects

3 **PROJECTS**
Add project containers so users can start adding data against projects

4 **PORTFOLIOS**
Create logical groupings to allocate projects and programs

5 **P3 SETUP Q&A**
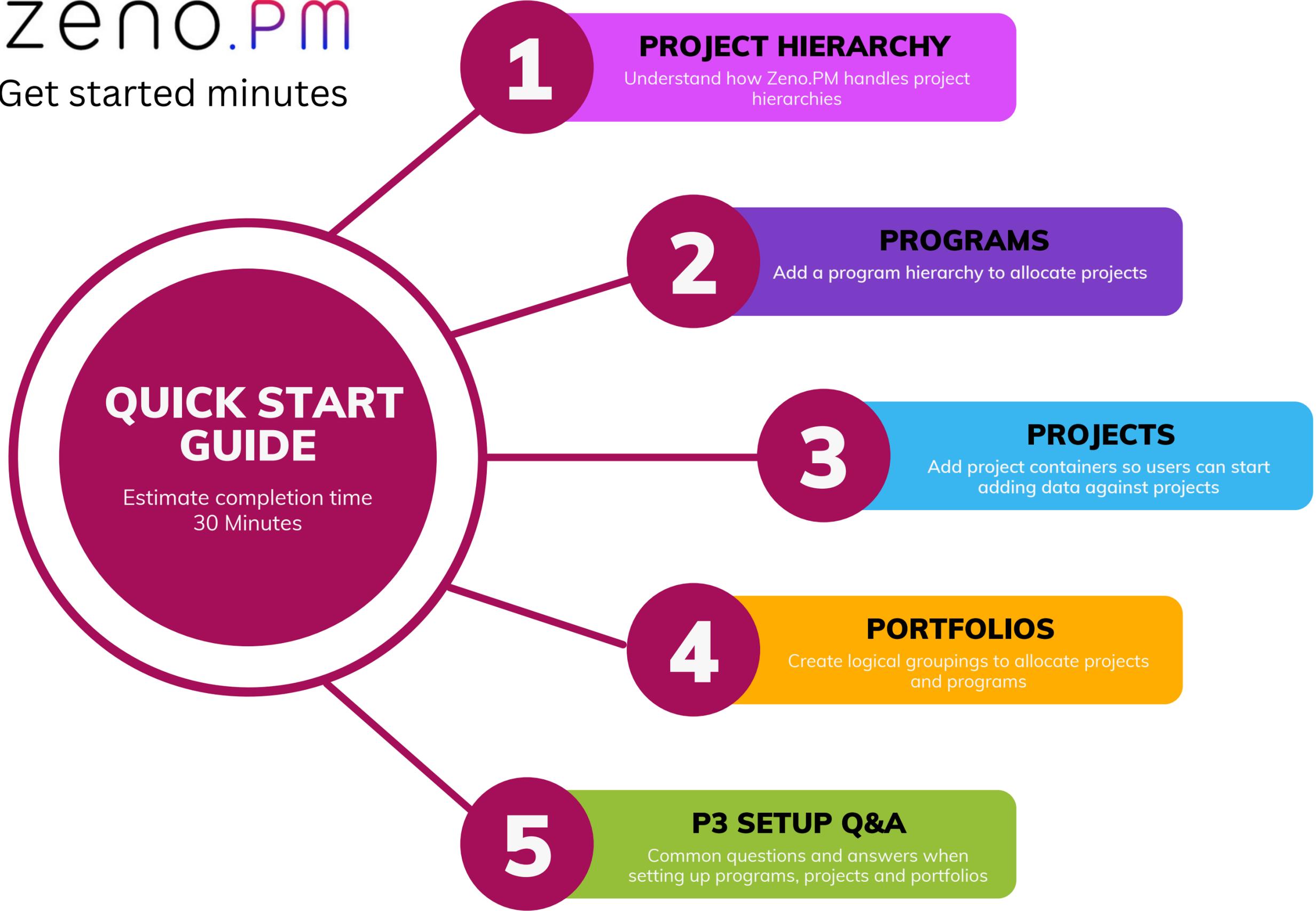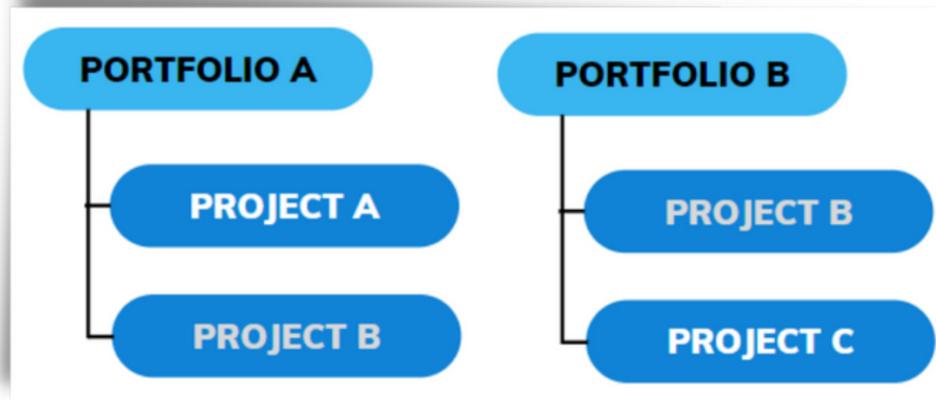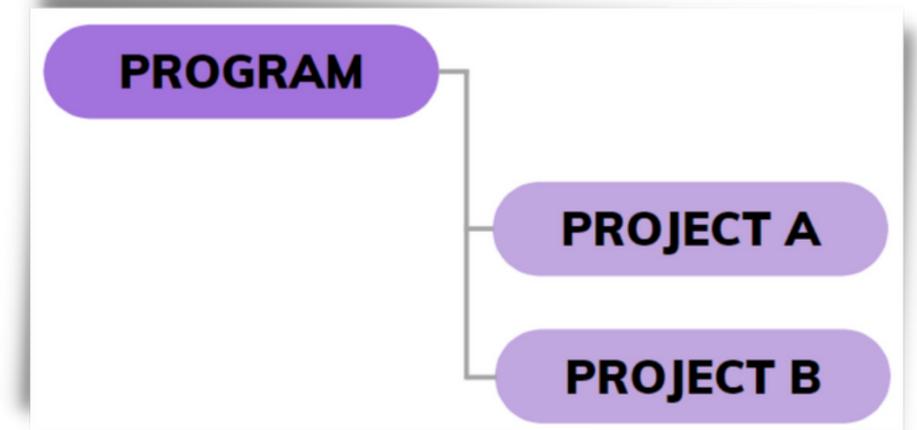Common questions and answers when setting up programs, projects and portfolios

ZENO.PM PROJECT HIERARCHY

Add a program hierarchy to allocate projects

Programs

A project can only report into a single program. There is no limit to the number of programs that can be created, nor projects assigned to them. This simple hierarchy helps to organise projects into groups of 'like' projects, and allows for user access to be cascaded down into projects via the parent program.

Programs can be 'real' or just a logical grouping of like projects.

Portfolios

Portfolios are also set up as logical groupings of projects. It is common that a single project will be allocated to **more than one portfolio**.

User access will also be cascaded down into projects to minimise the administration overhead and speed things up.
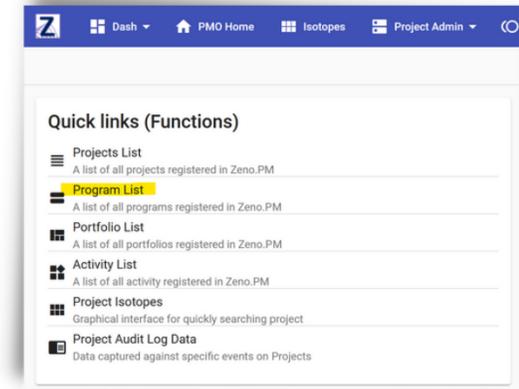
2 PROGRAMS

Add programs to allocate projects

Go to: PMO Portal -> Quick Links (Card) -> Program List

Create the initial set of programs you want to allocate projects too. Programs can be renamed, and more created in the future, so it is important not the get caught up in over thinking this aspect of the setup.

Zeno.PM comes with an existing program already created so that projects have something to align to. It is recommended that the name of this program be changed to something that is relevant to your business.

Programs help to organise 'related' projects into groups that can then be more easily measured, managed and reported using Zeno.PM's Programs **aggregated** dashboard functionality.

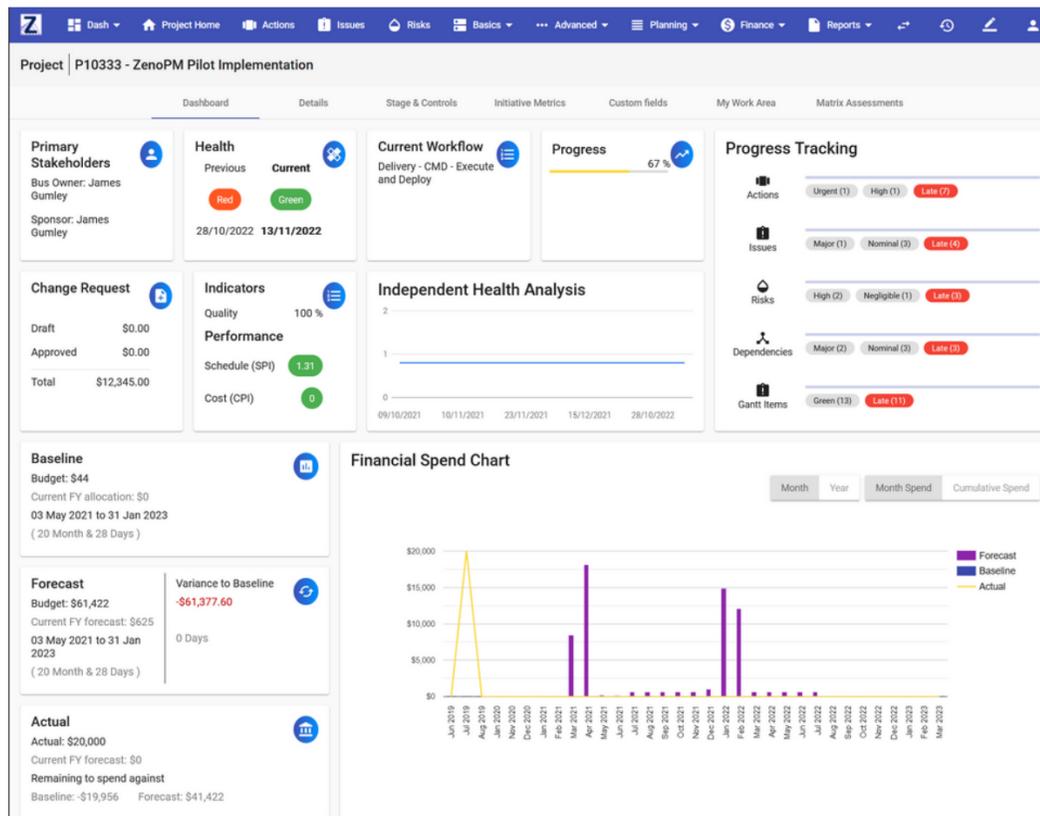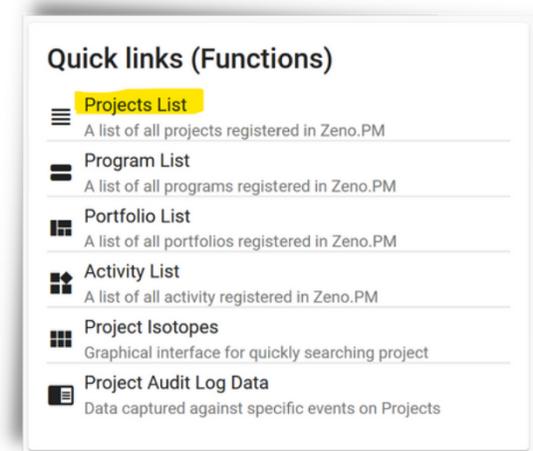Programs is complete, continue to (3) Projects

Add project containers so users can start adding data against projects

Go to: PMO Portal -> Quick Links (Card) -> Project List

Quick links (Functions)

Projects List
A list of all projects registered in Zeno.PM

Program List
A list of all programs registered in Zeno.PM

Portfolio List
A list of all portfolios registered in Zeno.PM

Activity List
A list of all activity registered in Zeno.PM

Project Isotopes
Graphical interface for quickly searching project

Project Audit Log Data
Data captured against specific events on Projects

In Zeno.PM a Project is a container used to add project information into. Add as many projects as required to parent programs to get going.

The project container is where you can add all the typical project data.

Issues: Add any issues that are currently impacting the project
Risks: Add any risks that could or may occur
Dependencies: Add in or outboujnd dependencies impacting the project
Gantt: Establish a delivery schedule using milestones and deliverables
Budget: Add a financial budget for the project
Reporting: Drfat the first project status report representing the current state of the project.

All the information assets above will be used in push button reporting as well as being automatically aggregated up to programs and portfolios.

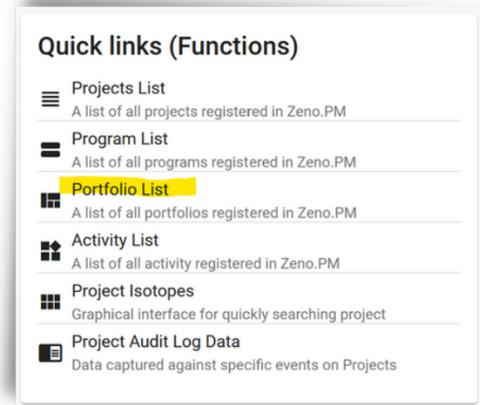Projects is complete, continue to (4) Portfolio

4 PORTFOLIOS

Create logical groupings to allocate projects and programs

Go to: PMO Portal -> Quick Links (Card) -> Portfolio List

Zeno.PM does not have any pre-made Portfolios so you will need to create Portfolios to meet your specific needs. It is very easy to change portfolio names or projects inside a portfolio so there is no need to be concerned about getting it absolutely right before you start.

Quick links (Functions)

- Projects List — A list of all projects registered in Zeno.PM
- Program List — A list of all programs registered in Zeno.PM
- Portfolio List — A list of all portfolios registered in Zeno.PM
- Activity List — A list of all activity registered in Zeno.PM
- Project Isotopes — Graphical interface for quickly searching project
- Project Audit Log Data — Data captured against specific events on Projects

Portfolios are just a logical representation of a group of projects, so they can be literally any type of grouping of projects.

Portfolios have an extended set of reports and addtional APIs available over programs.

Projects and Programs can be allocated to a Portfolio, however please note that allocating a program will only add the program record and not the entire aggregation of projects. In this scenario projects will also need to be individually added to the portfolio.

P3 SETUP Q&A

Create logical groupings to allocate projects and programs

- **Can I add a project to multiple programs ?**   No, you can only add any one project to a single program. A program can have many projects allocated to it.

- **Should we have a program and portfolio structure worked out and finalised before we start creating them in Zeno.PM?** Zeno.PM is very flexible and will easily accommodate future adjustments. It's always better to have some initial thinking behind structures however its not absolutely necessary. We always recommend just getting program and project containers setup, then start entering data as quickly as possible.

- **Why are you pushing so hard to just start entering data and not do heaps of pre-thinking, workshops and stakeholder discussions?** We have seen through many implementations how thinking evolves as a direct result of Zeno.PM usage. Usually customers that proceed to direct entry of data into Zeno.PM as quickly as possible begin to level up maturity faster and start delivering real insights and reporting value.

- **Can we allocate a project to another project?** No, this cannot be done. We recommend using a different structure to form this relationship if it is needed.

- **I've added projects and also allocated stakeholders but the project does not display on the user's opening page?** After allocating a stakeholder edit the stakeholder record again and check the checkbox that states 'User can see this project in their opening page list'.

- **Milestones and Deliverables are not showing when I run reports, what am I doing wrong?** In the Gantt Editor, extend the let panel by moving the center line to the right. Find the column that is representsy [R] for "Reportable" and check the row item of the milestone or deliverable that you wish to report.

- **Is it right that we have to set baselines individually for Gantt and Budget in each project?**   Yes, we capture baselines for the project schedule and baseline separately as this allows for fine grain control of which aspect of the project to be re-baselined inside the project if it is required later in the project.

- **How often should we write status reports?** We recommend a cadence of weekly or fortnightly for status reporting, at the very least for slow burn projects it should be monthly.

Setting up Programs, Projects and Portfolios is complete