Planisware Orchestra – Quick-Start for Multi Project Management

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For quite some time Planisware has been offering not only its established project portfolio management solution "Planisware Enterprise", but also "Planisware Orchestra". Acquired in a company takeover, the software aims at beginners as well as advanced project portfolio management professionals, and particularly focuses on collaboration of project teams. Planisware Orchestra has been designed to enable an intuitive start without extensive configuration, while keeping the organization's PPM processes as close as possible to the software's standard.

The range of functions sounds quite extensive: starting with idea management, budgeting and program planning, the software also covers the planning and control of individual projects. To this purpose, Planisware Orchestra provides planning functions for dates, resources and costs as well as functions for the project team's everyday collaboration. Analytics and reporting of project portfolios complete the software's feature line-up. For such broad functionality to be fully utilized, project environments usually need to have a certain size and thus complexity. If and how this might go along with the concept of standard functions and reduced customizing is an interesting question, which is already worth a closer look at the software.

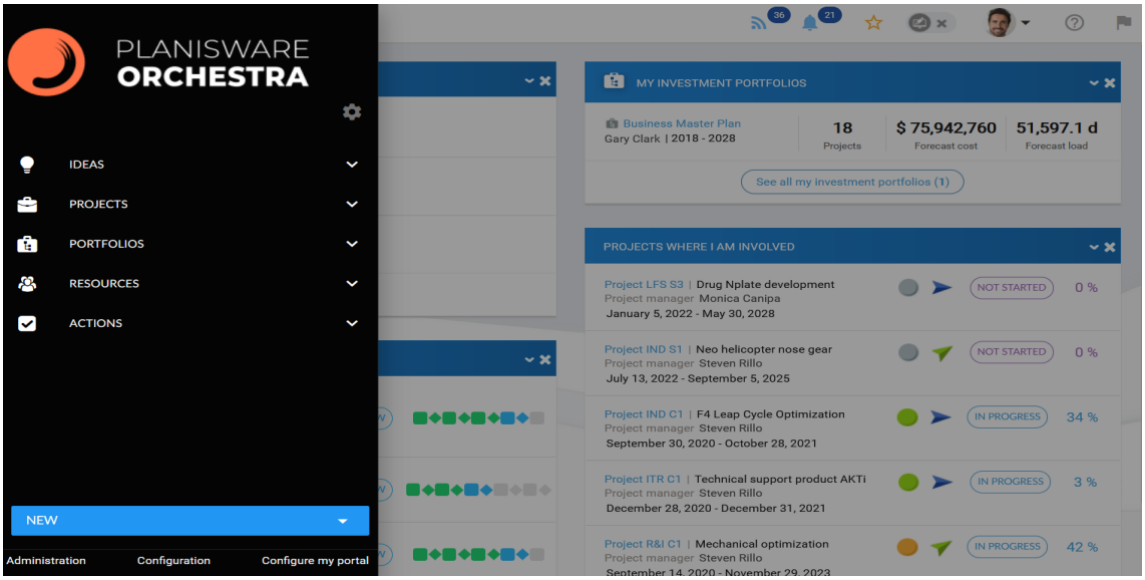


Figure 1: The main menu provides access to the various modules

User Interface and Navigation

The software welcomes the user with a modern, clearly structured user interface (Figure 1). The top row of the window holds the main menu, the personal favorites and notification icons for new messages and events. The main menu is structured by modules. For example, the “My Profile” section includes the user’s own tasks, “Ideas” is for evaluating new project ideas, “Projects” supports planning and controlling the individual projects, and the “Portfolios” module helps the PMO to keep track of all the projects and govern the portfolio.

The different modules all use another top row right below the menu row to display key information. An icon always indicates the planning object that is currently being edited. For example, a light bulb indicates ideas while a briefcase generally indicates a project. However, it is also possible to assign individual logos. The current object’s title and further information can also be found in the module’s top-row. here. In the case of ideas, for example, the creator of the idea, a rating number and the status are shown here.

Below the two header rows there is the workspace. Each module has several views. Users can quickly switch between them using tabs. For ideas, the standard configuration includes views for the general description of the idea, the evaluation of the strategic direction, and a list of associated documents. Some tab headers also work as drop-down menus, which are a bit unusual: when the cursor hovers over such a tab header for a while, additional menus might appear. For example, the "Schedule" tab for projects has a drop-down menu with views for the Gantt chart, the task list, and lists of relationships. However, once you have learned where to expect menus, this navigation works well and saves screen space.

Collecting and Evaluating Project Ideas

Orchestra does not require much to create a new project idea. Users only enter the name, a short description, an idea type, and the organizational unit concerned. The software can, of course, be configured to request much more information, even depending on the selected idea type and using multiple steps in a series of dialog windows. However, the very simple data entry form of the standard configuration is also a hint at the philosophy behind the software: Planisware Orchestra, as an "out-of-the-box" solution, first and foremost wants to offer an easy start. The software may then be expanded later.

To assess an idea’s benefit, it can be evaluated by answering a set of questions, which are grouped by category. The software then calculates an overall result. Thus, new ideas can quickly be evaluated using a standardized test scheme.

Choosing the right idea for realization might require an analysis of multiple factors. For example, the project management office might want to balance the strategic benefit and the expected costs. Orchestra can handle scenarios to facilitate decision making. Once a number of ideas has been selected for a scenario, Orchestra calculates the effects on key portfolio indicators, like overall costs, monetary benefits, personnel expenses, and an average strategic evaluation score. By comparing the different scenarios, the best bundle of ideas can then be determined, and the respective ideas approved. In a next step, projects are generated from

the approved ideas. If an idea does not justify a full dedicated project, it might simply be added as a new task to an already existing project.

So far, the idea scenario planning does not take into account any of the on-going projects. Hence, it is not yet possible to analyze the resulting resource utilization at this point. Such considerations can be made later using the portfolio module, when the corresponding project plans have been created, including a more precise schedule and resource planning.

Solid Project Management

Orchestra's template libraries can provide best-practice starting points for project planning to make setting up new projects easy. Organizations can use templates to provide well-thought-out templates, which reduce planning effort and ensure process quality. For example, mandatory key milestones might already be included, and the template can nudge users to adhere to a company's standardized product development process.

A classic Gantt chart is available to organize project tasks. Alternatively, there is also a tasklist. For small projects with no need to calculate automated schedules, users often prefer simple lists, as they are reminiscent of the supposedly uncomplicated Excel approach. While working with Orchestra's rather basic Gantt chart, users can quickly access key functions via context menus and the software shows additional information in pop-up windows. For example, hovering the mouse cursor over a Gantt task bar for a while, brings up a small window with additional information about the task dates, its current status, and the responsible team members. This concept keeps the workspace clear while detailed information is still quickly accessible.

To avoid too extensive and thus unmanageable schedules, Gantt tasks cannot only be split into sub tasks, but also into actions. Actions do not appear in the Gantt chart. Instead, Orchestra shows them in lists, in a calendar view, and as cards on a Kanban board (Figure 2). This way, a task lasting several weeks can be planned in the Gantt chart and detailed by several actions. Once resources have been assigned as team members, the respective users can divide the actions among each other, refine the planning if necessary, and then use the Kanban board to organize their work on the task. The task's level of completion can be determined automatically based on the team's action completion. Kanban boards not only allow to micro-manage scheduled Gantt tasks; they are also useful to handle complete projects with one central board and no Gantt schedule at all. Thus, Orchestra offers various ways to coordinate projects as needed by either using a classic schedule, a Kanban board, or a combination of both.

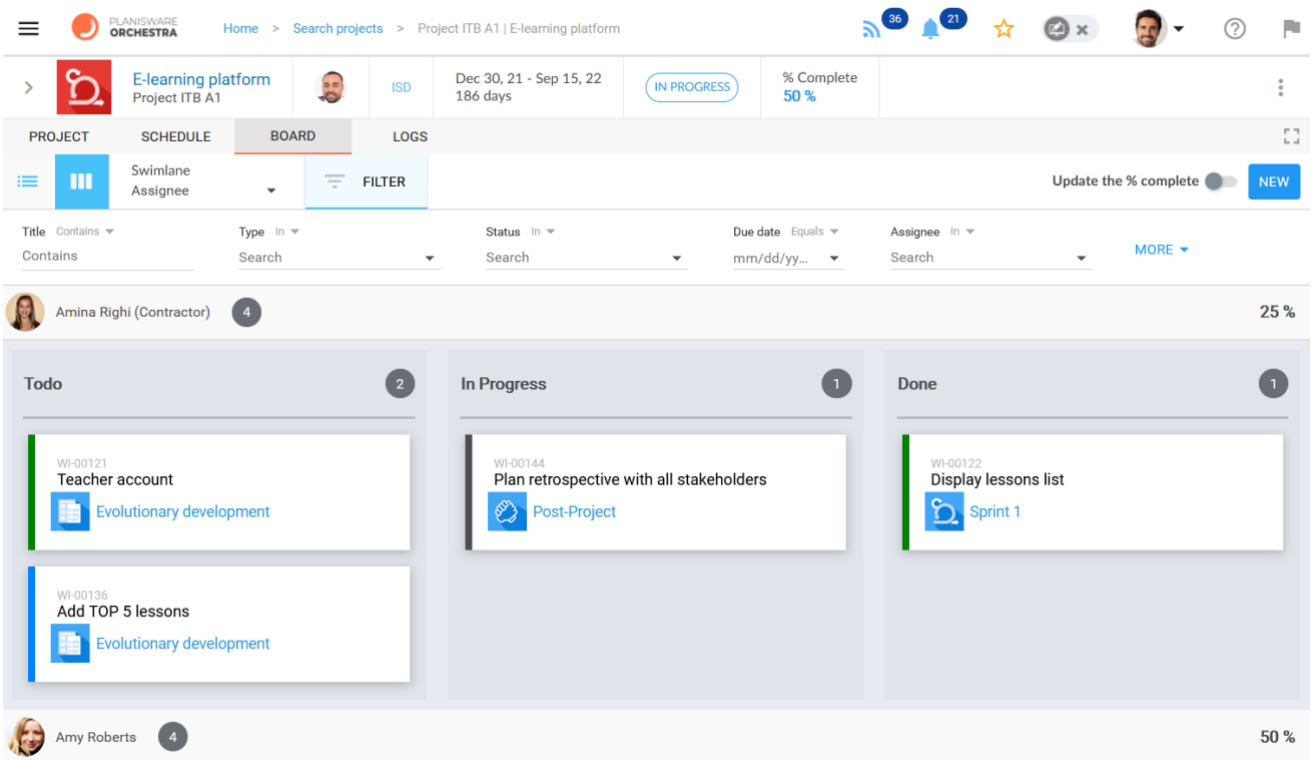


Figure 2: Task information can also include a list of related actions

Aside from named team members, Orchestra can also plan generic resources. This is especially useful if activities are scheduled far in the future and only the required roles and qualifications are known yet.

When generic resources are later replaced by named team members, the responsible resource managers (e.g., the head of a development department) must usually name the resources and approve the project engagements. Orchestra's workflow engine supports resource requests from project managers to resource managers. Project managers first send requests for roles and qualifications to the resource managers, who then analyze their team's resource situation and finally assign suitable team members to the project. To do so, resource managers get special views on their team's project assignments. Whenever they select an incoming resource request to process it, Orchestra automatically suggests suitable team members based on qualification and available capacity. As a result, project managers and resource managers can each create their own plans independently of each other. They then use dashboards and tabular capacity overviews to identify possible conflicts and align their plans. Though even the best software workflows do not make up for communication, they are a good way to document the result of such an alignment process.

Based on the planned resources, Orchestra calculates the expected personnel costs. Costs of other types are entered into spreadsheet-like forms. Users can choose whether they plan costs for the overall project, a particular phase, and even individual tasks. Orchestra summarizes the costs in tabular reports and diagrams. Together with actual costs, which are typically imported from an ERP system, advanced control methods like Earned Value Analysis can be run. In addition to the planned costs, the budget is stored separately so that actual and planned costs can be compared to the financial resources already granted to the project.

Teamwork - Informing Instead of Entrenching

Orchestra focuses on the exchange of information between the project participants rather than on entrenching project processes by strict software workflows. A well-designed "activity stream" always presents the latest events in the project. The activity stream informs users, for example, about the completion of a milestone, a changed duration for a task, and an updated risk assessment. Users can configure their own notification profile by subscribing to the planning objects they are interested in.

To facilitate collaboration, planning objects can be forwarded to other users together with a short comment. The recipients then receive the message and a link to the respective planning object. For example, a team member who is uncertain about the relevance of a project risk could quickly forward it to a colleague for review and approval.

Subscriptions and forwarded planning objects keep the project team up to date even between project meetings. It is also possible to comment on planning objects and thus have discussions directly in Orchestra. Instead of creating loads of e-mails, details of a deliverable's quality issues and how to correct them can be documented directly in the software, making it easier for anyone to follow the discussion.

Focus on Project Results

In addition to pushing on project tasks, project managers must especially keep an eye on project results. Tracking the progress of project deliverables, i.e., the project's output, is a proven way to do so. Projects managed according to PRINCE2® and gate-oriented approaches following a product development process make extensive use of this concept. Planisware Orchestra supports Stage-Gate® processes and manages deliverables separately from the schedule's tasks. Hence, there is no need to bloat the schedule by planning a separate task for every single deliverable, which is often the case in other software solutions. Instead, deliverables can be assigned to the project phase or work package in which they are created and to a gate milestone at which they need to be available and approved latest.

A special gate view (Figure 3) shows the status of all deliverables for the project's phases and gates. This result-oriented view helps project managers to measure the project progress not only by task completion but also by the maturity of the project's deliverables.

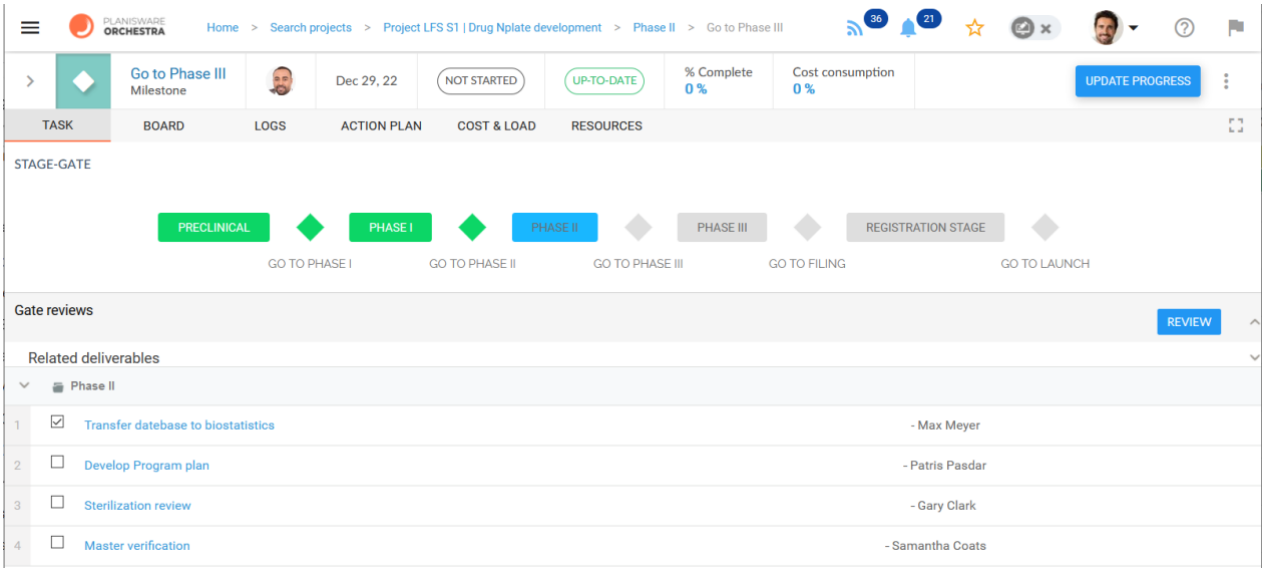


Figure 3: Orchestra summarizes all required delivery items in a phase and gate view

Scenarios and Budgets for Portfolio Planning

Orchestra is not only a project management tool but also covers project portfolio management. The software offers many useful visualization options to create clearly arranged multi-project dashboards (Figure 4). Overall schedules, milestone plans, various business graphics and tabular overviews with indicator icons can be created for any group of projects. Like with all of the software's modules, users can save their own favorite variants as templates. With just a few clicks they can then switch between these templates, e.g., to move from a cost-oriented to a schedule-oriented perspective.

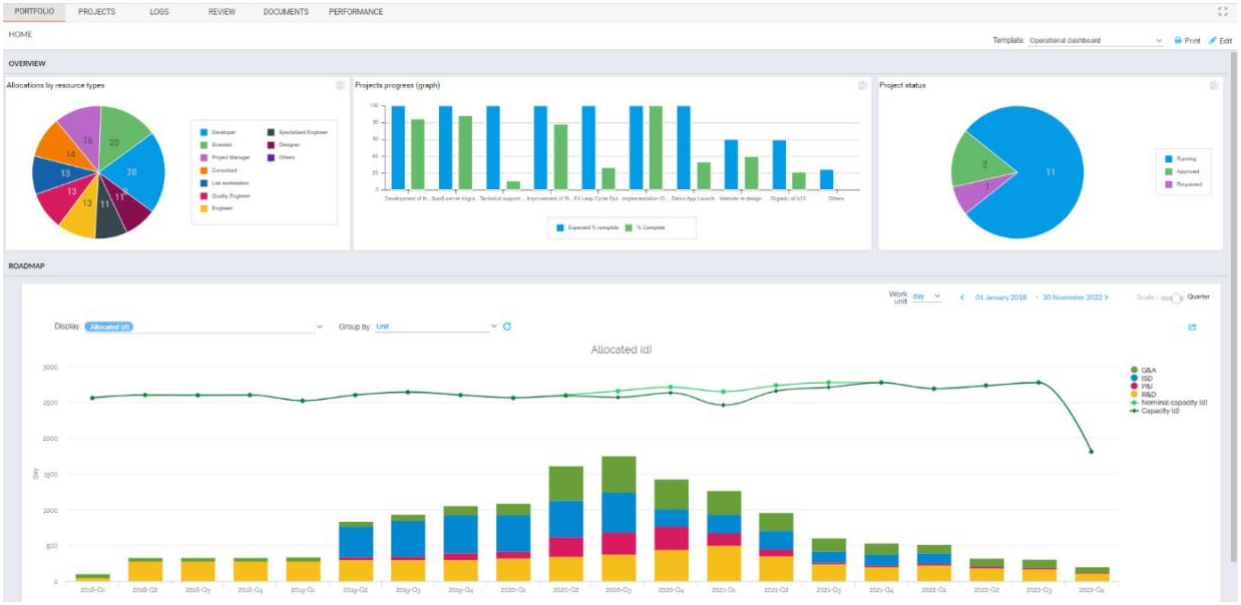
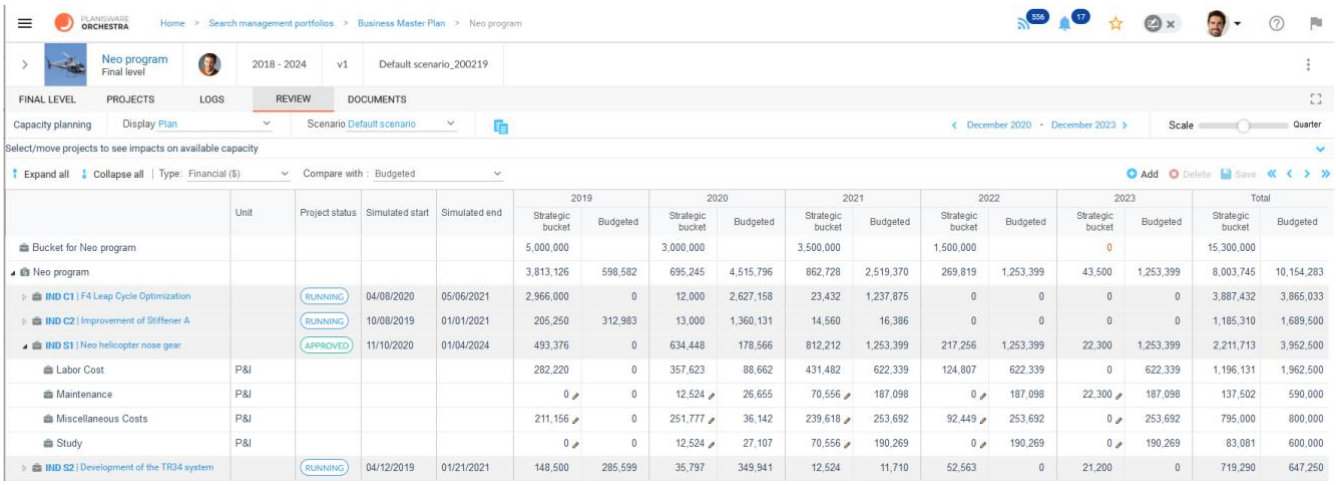


Figure 4: Dashboards display the most important project information in the portfolio

However, Orchestra not only analyzes existing project portfolios. It also supports composing new future portfolios by so-called "strategic portfolios", which allow to actively select the projects for a portfolio based on systematic assessments. Whether a project is added to a portfolio, postponed, or finally rejected affects the financial planning and the resource capacity of the whole organization. To assess such impacts of portfolio decisions, several variants of a portfolio can be stored as scenarios and compared to each other.

Planisware Orchestra also covers strategic budgeting, which allocates the available funds of a portfolio top-down to its projects. The software's interactive spreadsheet-like forms show which share of the portfolio budget has already been allocated to the various projects and how much remains for further projects. Users can compare actual and planned costs of the projects to the allocated project budgets and easily make adjustments where necessary (Figure 5). Thus, strategic budgeting synchronizes the financial planning of projects with the organization's higher-level planning, e.g., the portfolio planning for an R&D department.



	Unit	Project status	Simulated start	Simulated end	2019		2020		2021		2022		2023		Total	
					Strategic bucket	Budgeted	Strategic bucket	Budgeted	Strategic bucket	Budgeted	Strategic bucket	Budgeted	Strategic bucket	Budgeted	Strategic bucket	Budgeted
Bucket for Neo program					5,000,000		3,000,000		3,500,000		1,500,000		0		15,300,000	
Neo program					3,813,126	598,582	695,245	4,515,796	862,728	2,519,370	269,819	1,253,399	43,500	1,253,399	8,003,745	10,154,283
IND C1 | F4 Leap Cycle Optimization		RUNNING	04/08/2020	05/06/2021	2,966,000	0	12,000	2,627,158	23,432	1,237,875	0	0	0	0	3,887,432	3,865,033
IND C2 | Improvement of Stiffener A		RUNNING	10/08/2019	01/01/2021	205,250	312,983	13,000	1,360,131	14,560	16,386	0	0	0	0	1,185,310	1,689,500
IND S1 | Neo helicopter nose gear		APPROVED	11/10/2020	01/04/2024	493,376	0	634,448	178,566	812,212	1,253,399	217,256	1,253,399	22,300	1,253,399	2,211,713	3,952,500
Labor Cost	P&I				282,220	0	357,623	88,662	431,482	622,339	124,807	622,339	0	622,339	1,196,131	1,962,500
Maintenance	P&I				0	0	12,524	26,655	70,556	187,098	0	187,098	22,300	187,098	137,502	590,000
Miscellaneous Costs	P&I				211,156	0	251,777	36,142	239,618	253,692	92,449	253,692	0	253,692	795,000	800,000
Study	P&I				0	0	12,524	27,107	70,556	190,269	0	190,269	0	190,269	83,081	600,000
IND S2 | Development of the TR34 system		RUNNING	04/12/2019	01/21/2021	148,500	285,599	35,797	349,941	12,524	11,710	52,563	0	21,200	0	719,290	647,250

Figure 5: Comparison of strategic budget targets with the projects' planned values

Technology and Licenses

Planisware Orchestra is primarily offered as a service. However, organizations that definitely do not want a cloud-based software can run the software on their own hardware. Orchestra customers can use the cloud software with about 50 users for a monthly flat rate of €1,250. The software has a REST API for interfaces to other systems, e.g., to integrate financial data from the ERP system and connect document management systems. Using BIRT report designer, Orchestra creates reports in PDF, Word, Excel, and PowerPoint file formats.

If special business intelligence (BI) software is already in place, Planisware Exchange makes Orchestra's data available to these BI tools for cross-system reporting. To adapt the software to individual needs, the PMO's administrators can use the Orchestra Designer to add additional data fields to existing planning objects, hide unnecessary standard fields, and create new planning objects as required. Planisware calculates with an average duration of eight weeks from the implementation project's kick-off to the go-live of the first customized version of Orchestra.

Conclusion

Back to the initial question: How does the concept of standard functions and reduced customizing go along with managing various types of projects in substantial portfolios? In the case of Planisware Orchestra, quite well, because there is enough flexibility to use the software's functions in customized processes. Orchestra does not impose rigid processes but offers proven functions. Users can decide individually how to use them exactly, although it is certainly best if a project management office ensures a minimum standard.

The existing functions furthermore cover a broad set of methods and some of them are quite advanced – for example, if it comes to strategic budgeting. In other areas, like Gantt scheduling, Orchestra currently offers rather basic functions. However, the manufacturer already plans on extending the software's scheduling capability in the medium term. The Kanban boards underline the software's focus on "project collaboration" and make Gantt scheduling less essential. If it is possible to align PM processes with the software, a quick start is possible once the consistent philosophy of the software's modules has been understood. The clear and modern user interface makes the start even easier.

Wherever Orchestra lacks essential information or functions, it can be adapted. However, if large organizations need extensive adaptions and a highly individualized functionality, this rather calls for Planisware Enterprise. Medium-sized organizations that are open to be inspired by pragmatic project and project portfolio management utilizing proven standard methods should, on the other hand, have a look at Planisware Orchestra.

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