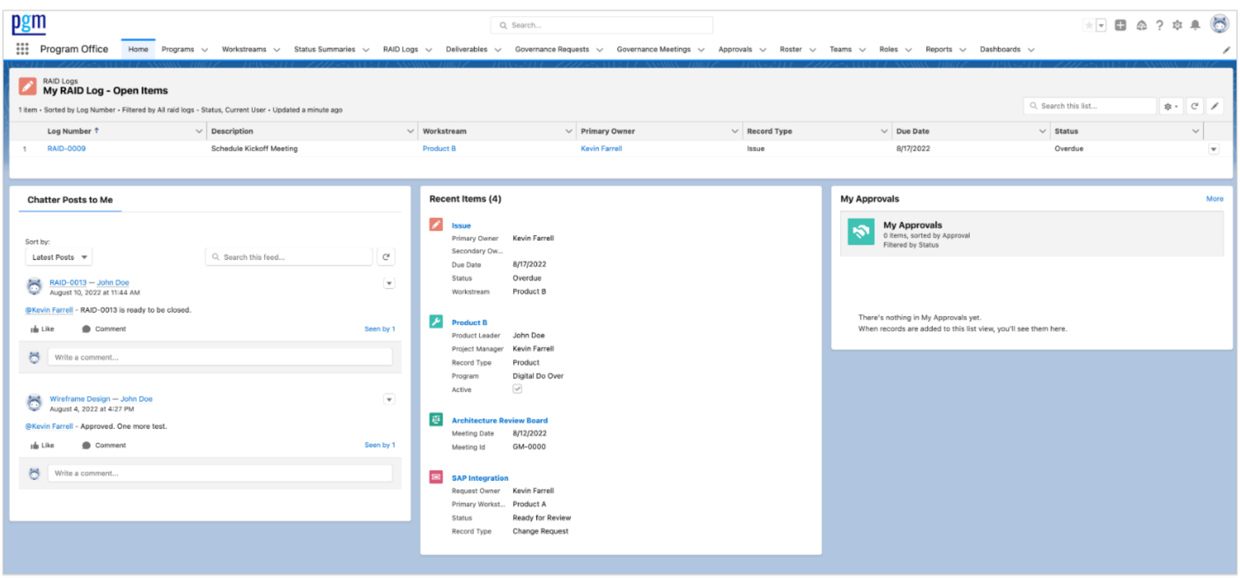
Program Office

Introduction

Welcome to Program Office! The application is built for Program and Project Managers to handle the daily tasks related to running a project, keeping team members accountable, and informing stakeholders. The application is ideally suited for programs with multiple workstreams and resources working together to deliver a Salesforce solution. Key features of Program Office include:

- Weekly status reporting
- RAID logs
- Deliverables and milestones
- Change Control and Architecture Review boards
- Roster and team assignments
- Approvals

The application can be extended for your project as needed, and is built on the Salesforce platform with all declarative capabilities making it easy to maintain and support.



The following documentation provides an overview of the features of the application and an inventory of the declarative capabilities that make up the solution.

Before You Begin

NOTE: Program Office is dependent on the CMTD Enhance Related List component. This must be installed in your Org for **All Users** before installing the Program Office application.

Once Program Office is installed in your Org, the following post-deploy setup is required before you begin to used the application.

ROLE HIERARCHY

Create a new role for the **Program Manager**. Go to Setup > Users > Roles and create a new role with the following settings:

- Label: **Program Manager**
- Role Name: **PgM_Program_Manager**
- This role reports to: Any role
- Role Name as displayed on reports: Leave blank
- Opportunity Access: Default setting

Assign the **Program Manager** role to the users who are part of the program's PMO. **At least one user is required.**

PROFILES & PERMISSION SETS

If you are installing Program Office in an existing Org, users may keep their existing Profiles and all they need is the **Program Office User** permission set to be assigned. Go to Setup > Users > Permission Sets, click on the **Program Office User** permission set, and click the **Manage Assignments** button to assign to all relevant users.

If you are installing Program Office in a new Org dedicated to just the Program Office application, then clone the **Minimum Access - Salesforce** standard profile and create a **Program Office User** profile. Go to Setup > Users > Profiles, click the **Clone** link next to the Minimum Access - Salesforce profile, and add **Program Office User** as a new profile.

In both cases - an existing user profile or a new Program Office user profile, the **Run Flows** permission needs to be enabled. Select the Profile to be updated and scroll to the **General User Permissions** section, check the **Run Flows** option and click the **Save** button

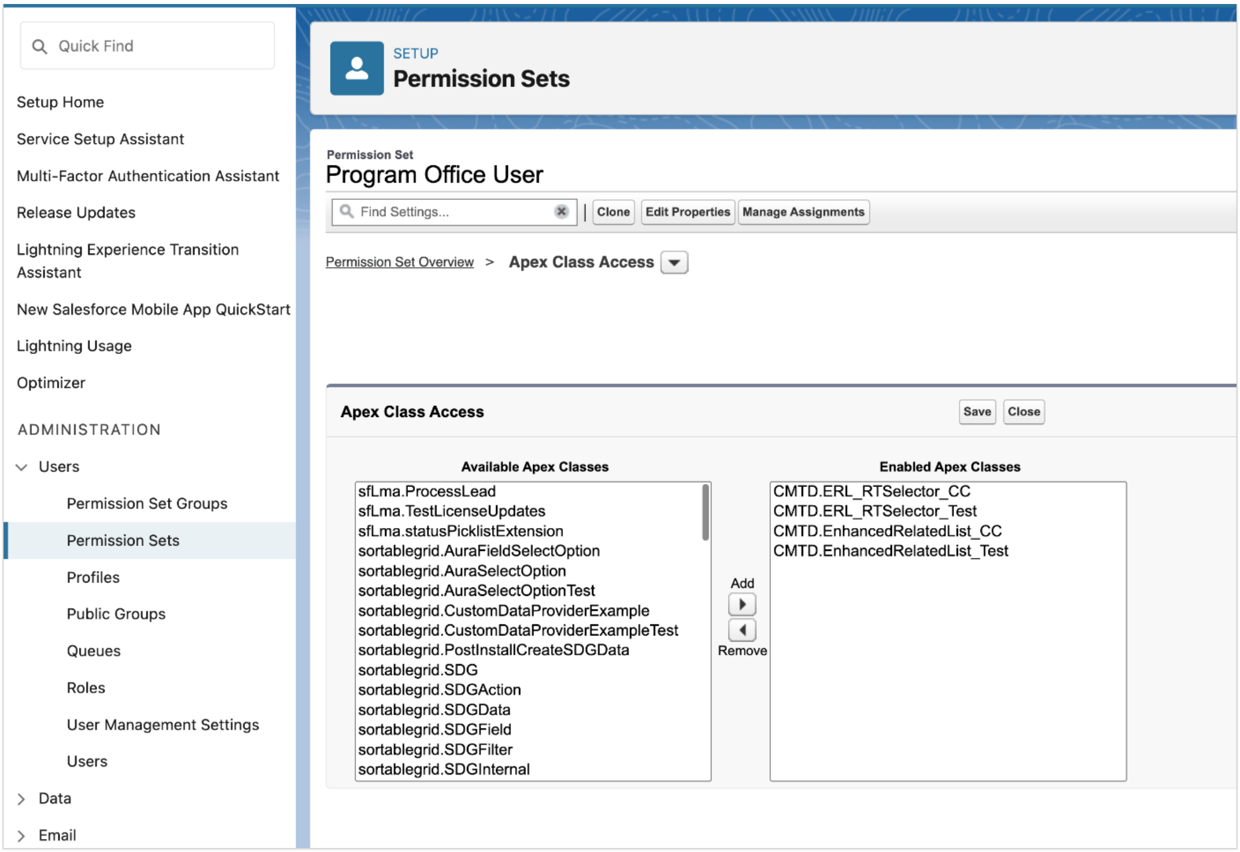
Assign the Program Office User profile to your non-System Admin users. **Also, assign the Program Office User permission set to these users.**

Program Office User Permission Set Configuration

The **Program Office User** permission set requires **Apex Class Access** and **System Permissions** to be configured in Setup > Users > Permission Sets.

From the list of Permission Sets select **Program Office User** and

- Click on **Apex Class Access** in the App section of the Permission Set Overview
- Click the **Edit** button
- From the **Available Apex Classes** list select the four classes that begin with **CMTD** including:
  - CMTD.ERL_RTSelector_CC
  - CMTD.ERL_RTSelector_Test
  - CMTD.EnhancedRelatedList_CC
  - CMTD.EnhancedRelatedList_Test
- Click the **Add** button to move the classes to the **Enabled Apex Classes** list and click the **Save** button



Return to the Permission Set Overview and in the System section:

- Click on **System Permissions**
- Click the **Edit** button
- Check the boxes next to the following permissions:
  - Access Activities
  - Change Dashboard Colors
  - Chatter Internal User
  - Create and Customize Dashboards
  - Create and Customize List Views
  - Create and Customize Reports
  - Create Report Folders
  - Edit Events
  - Edit My Dashboards
  - Edit My Own Posts
  - Edit My Reports
  - Edit Tasks
  - Lightning Experience User
  - Manage Dynamic Dashboards
  - Report Builder (Lightning Experience)
  - Run Reports

- Schedule Dashboards
- Schedule Reports
- Subscribe to Dashboards
- Subscribe to Dashboards: Add Recipients
- Subscribe to Reports
- Subscribe to Reports: Add Recipients

- Click the **Save** button and click the second **Save** button

PATH SETTINGS

Path Settings need to be enabled in your Org. Go to Setup > Path Settings and click the **Enable** button. If Path Setting are already enabled, you can skip this step.

LIGHTNING PAGE ACTIVATION

Four Lightning pages require activation.

Custom Object	Lighting Record Page	Record Type
Outcome	Acceptance	Acceptance
RAID Log	RAID - Decision	Decision
Roster	Roster - Team Member + Onboarding	Team Member + Onboarding
Status Indicator	Leadership Indicator	Leadership

To activate each page:

- Go to Setup > Object Manager > *Custom Object* (Outcome, RAID Log, Roster)
- Click the **Lightning Record Page** link
- Select the designated page (Acceptance, RAID - Decision, Roster - Team Member + Onboarding)
- Click the **Edit** button
- Click the **Activation...** button in the upper right
- Click the **App, Record Type, and Pro...** tab
- Click the **Assign to Apps, Record Types, and Profiles** button
- Select the **Program Office** app and click **Next**
- Select **Desktop and phone** and click **Next**
- Select the designated Record Type (see above) and click **Next**
- Select the appropriate Profiles** and click **Next**
- Click the **Save** button

** If you are installing in a new Org, select the **Program Office User** and **System Administrator** profiles. If you are installing in an existing Org, select the Profiles that are applicable to your Org.

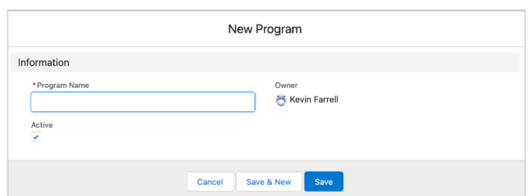
PICKLISTS

Program Office includes a four picklist fields that need to be modified for your company/customer and roadmap. The picklists are updated in **Setup > Object Manager** for the custom objects listed below.

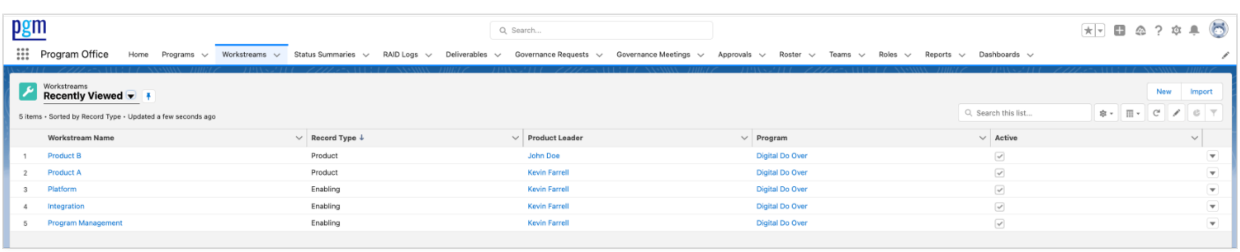
Custom Object	Picklist Field	Default Values	New Values
Outcome	L1 Capability	Sample 1 Sample 2 Sample 3 Sample 4 Sample 5 Sample 6 Sample 7 Sample 8 Sample 9 Sample 10	The names of the L1 Capabilities on your product roadmap.
RAID Log	L1 Capability	Sample 1 Sample 2 Sample 3 Sample 4 Sample 5 Sample 6 Sample 7 Sample 8 Sample 9 Sample 10	The names of the L1 Capabilities on your product roadmap.
Governance Request	Requested By	Customer Vendor A Vendor B	Your Company or Customer's Name and the names of any System Integrators or Partners involved with the program.
Roster	Company	Customer Vendor A Vendor B	Your Company or Customer's Name and the names of any System Integrators or Partners involved with the program.
Roster	Staffing Source	Internal Vendor A Vendor B	Replace Vendor A and B with any System Integrators or Partners involved with the program.

Getting Started

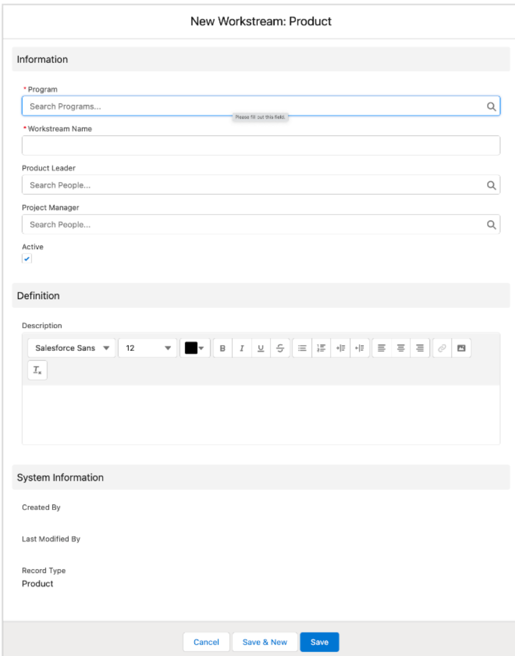
Program Office is built to manage one or more **Programs** each with multiple **Workstreams.** To start, **add a new Program** record for your program. Use whatever descriptive name is appropriate. The Active checkbox is selected by default and should remain checked.



Workstreams are the tracks of work that make up the program. **Product** workstreams are the core initiatives that are being developed as part of the program. If a program is implementing Service Cloud and Marketing Cloud, workstreams such as Customer Service and Marketing Automation might be appropriate. Alternatively, a Sales Cloud implementation might product workstreams for each Level 1 capability such as Lead Management, Opportunity Management and Territory Management. In the end, the workstream should represent how you are aligning your development teams so they are consistent.



An **Enabling** workstream supports the Product workstreams by providing a service or capability that the program requires. Potential tracks include Integration, Data Migration, Change Management, and the PMO itself. Create workstreams for each of these related tracks to create a holistic view of the program.



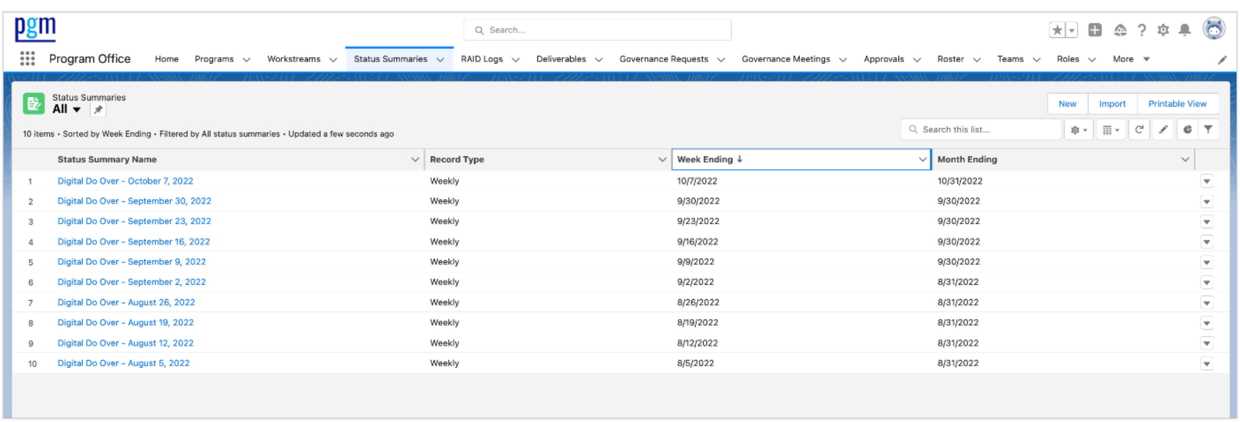
A Workstream record has a few additional attributes along with the type (Product/Enabling). The **Product Leader** and **Project Manager** attributes are important for designating the individuals in these key roles. Assigned these users as soon as possible as they receive Chatter notifications RAID-related events.

The **Description** field is used to provide an overview of the each workstream and its purpose.

Once you have your Program and Workstream records in place, you are ready to go!

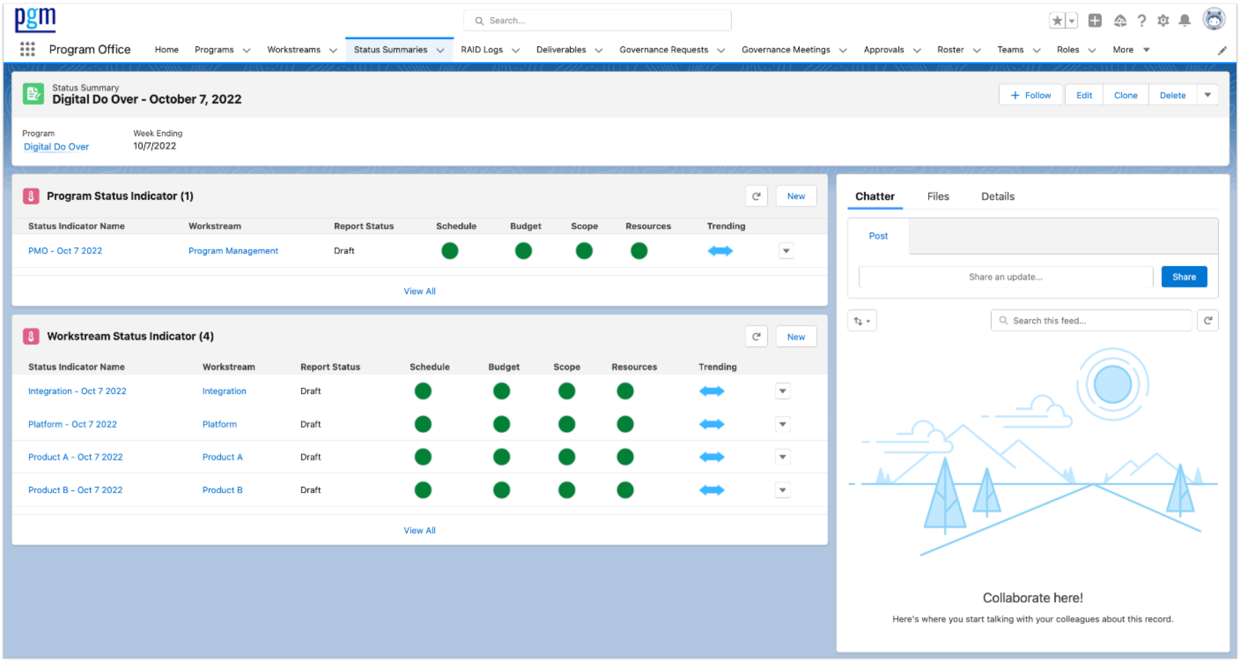
Weekly Status Reports

Weekly Status reports are created with one parent record for each week and one or more child records for each individual Workstream reporting a status. The parent record referred to as the **Weekly Status Summary** is auto-generated by a Flow on Monday mornings with a **Week Ending Date** set to Fridays. The Flow creates a record with the **Program Name** from each Program concatenated with the **Week Ending Date**.



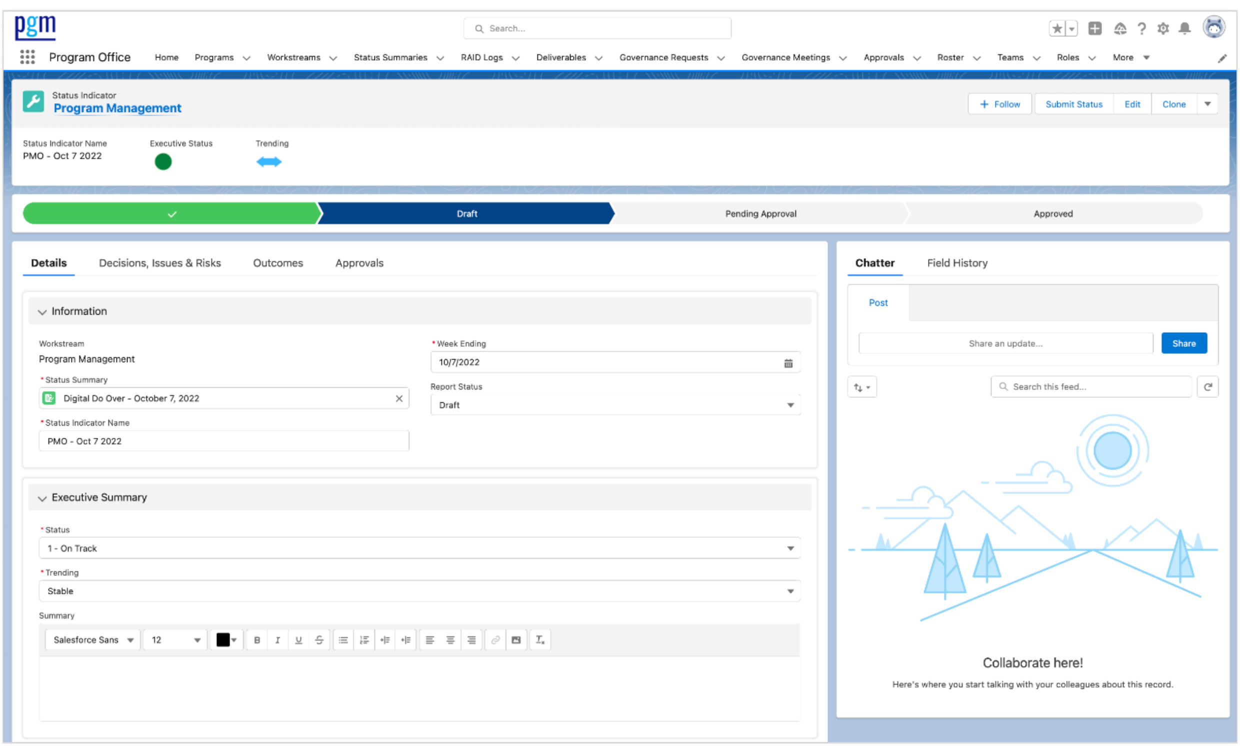
The Flow named **Create Status Summary Record (Scheduled)** creates the record. Its schedule and the record naming convention can be modified to your needs by updating this Flow.

Each workstream then creates a child record for its status. An individual status record is a **Status Indicator.** A Status Indicator is either a **Program** or **Workstream** type - the only difference being the Program record type is displayed in the Program Status Indicator related list and the Workstream record type in the Workstream Status Indicator list. The Program status indicator provides the overall status of the program and any highlights from the PMO. The Workstream status indicators provide the status of their specific domains.



STATUS INDICATOR ATTRIBUTES

The Information attributes of a status indicator include the **Workstream, Status Summary, Week Ending, Report Status,** and **Status Indicator Name.** Define a naming convention for the Status Indicator Name that includes reference to the Workstream and Week Ending Date such as [Workstream Name] + MMM DD YYYY. The Report Status defaults to Draft and is not directly editable.



The Executive Summary attributes include at overall **Status** for the workstream, the direction the workstream is **Trending**, and a **Summary**, which provides high-level overview of the workstream. The Status attribute is either:

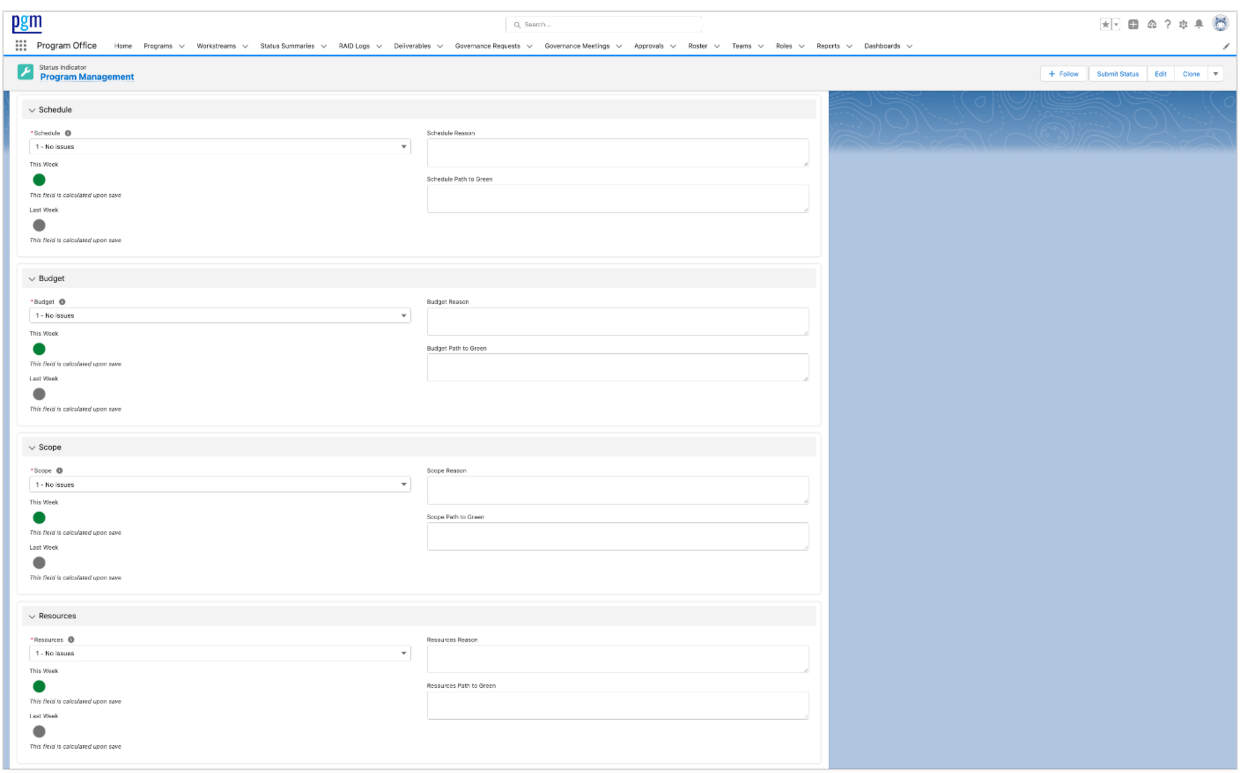
- On Track
- On Schedule but at risk with mitigation plan
- Delayed, or At Risk without a mitigation plan

The Trending attribute expresses the direction and sentiment regarding workstream's health including:

- Stable
- Up
- Down

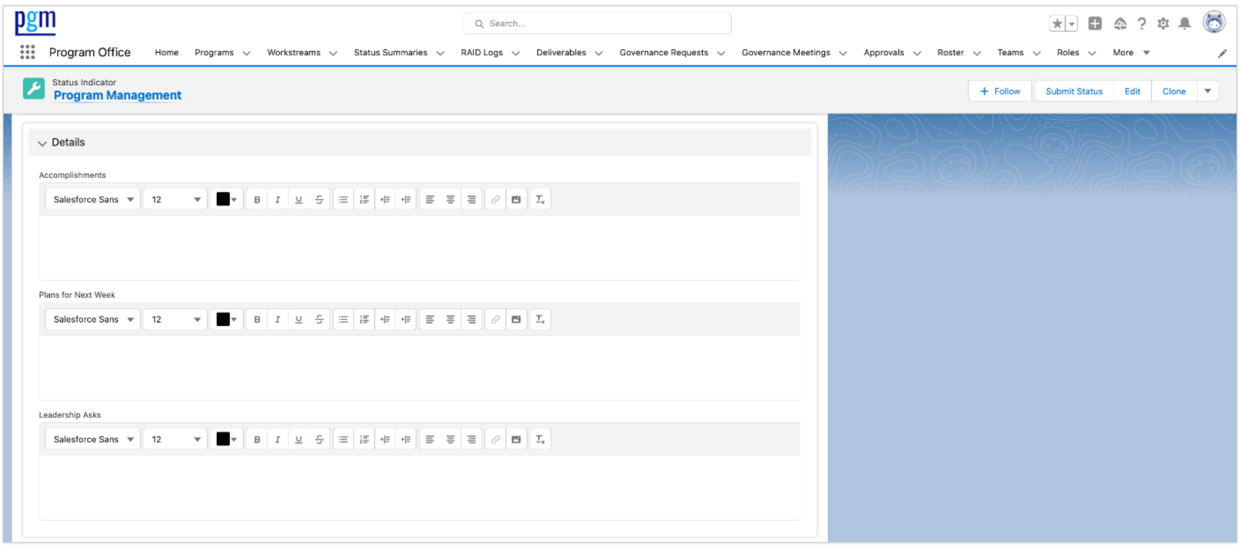
The **Schedule**, **Budget**, **Scope** and **Resource** attributes all rate the workstream on a 1 - 10 scale that results in a Red/Amber/Green indicator. If the rating is 1 - 3, then **This Week** is green. A rating of 4 - 7 is yellow and 8 - 10 is red. The rating scale is as follows:

1. No issues
2. One or two minor issues
3. Several issues
4. One or two elevated issues
5. Several elevated issues
6. Issues likely to impact outcomes
7. Issues impacting outcomes
8. Issues blocking outcomes
9. Crisis imminent
10. Emergency escalation



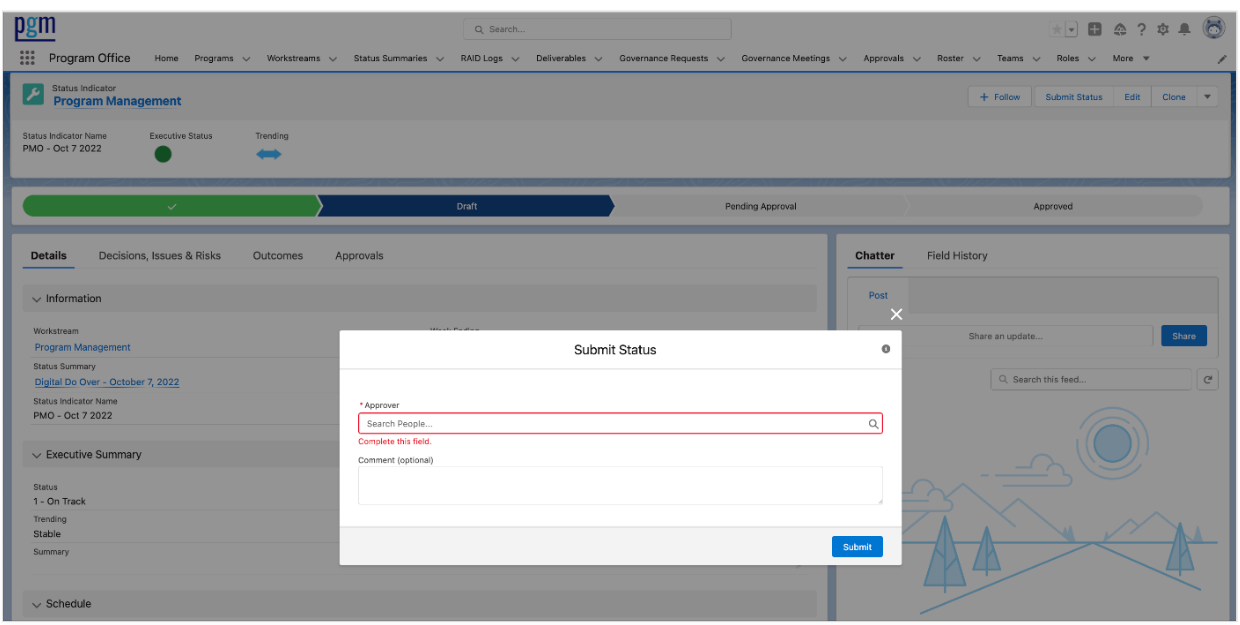
If the rating is 4 - 10 (Yellow or Red) then the **Reason** field is required to provide an explanation. The **Path to Green** is an optional field but should be provided along with the Reason field whenever possible. The **Last Week** field is a formula that shows the prior week's rating.

The Detail attributes provide rich-text areas to document **Accomplishments**, **Plans for Next Week**, and **Leadership Asks**. This is a free form area to provide a full description of the progress being made and upcoming activities for the next week. Often the Accomplishments section is used to document what kept the workstream busy for the week but it should be reserved for what was accomplished or completed. On going work is more appropriately listed in the Plans for Next Week.

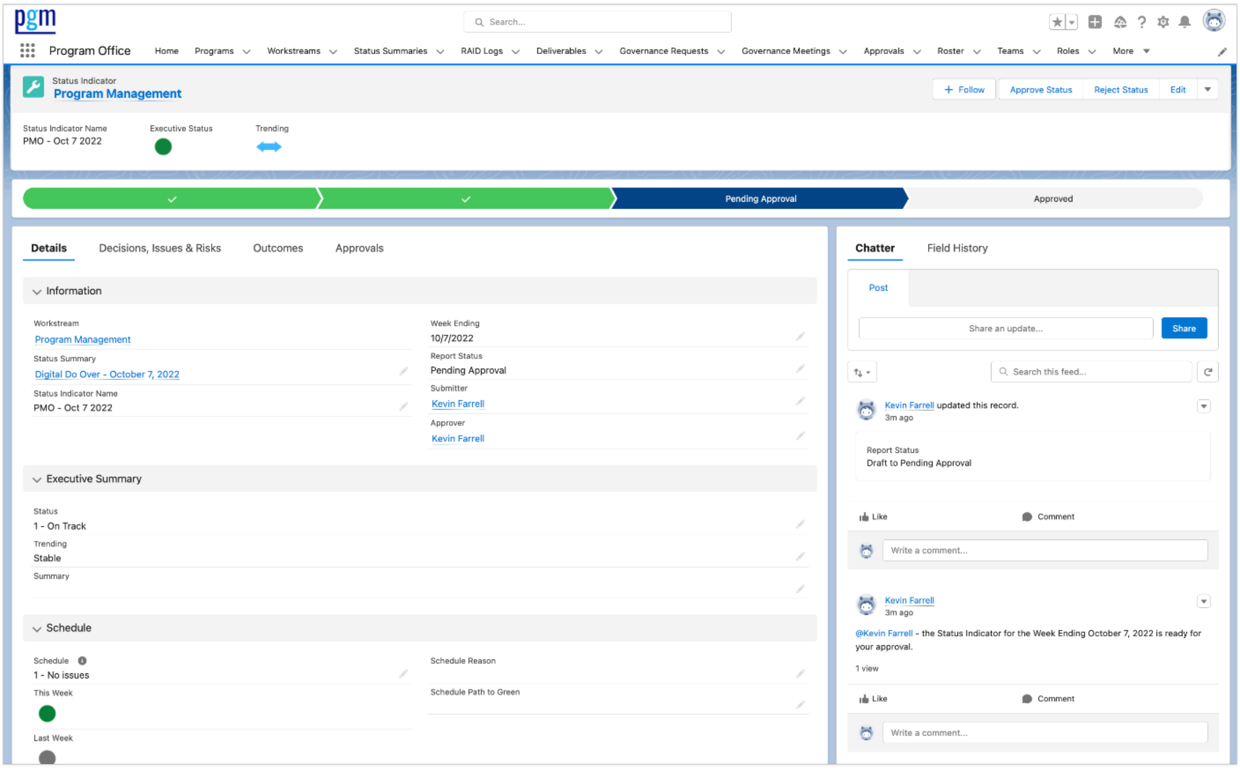


STATUS APPROVAL

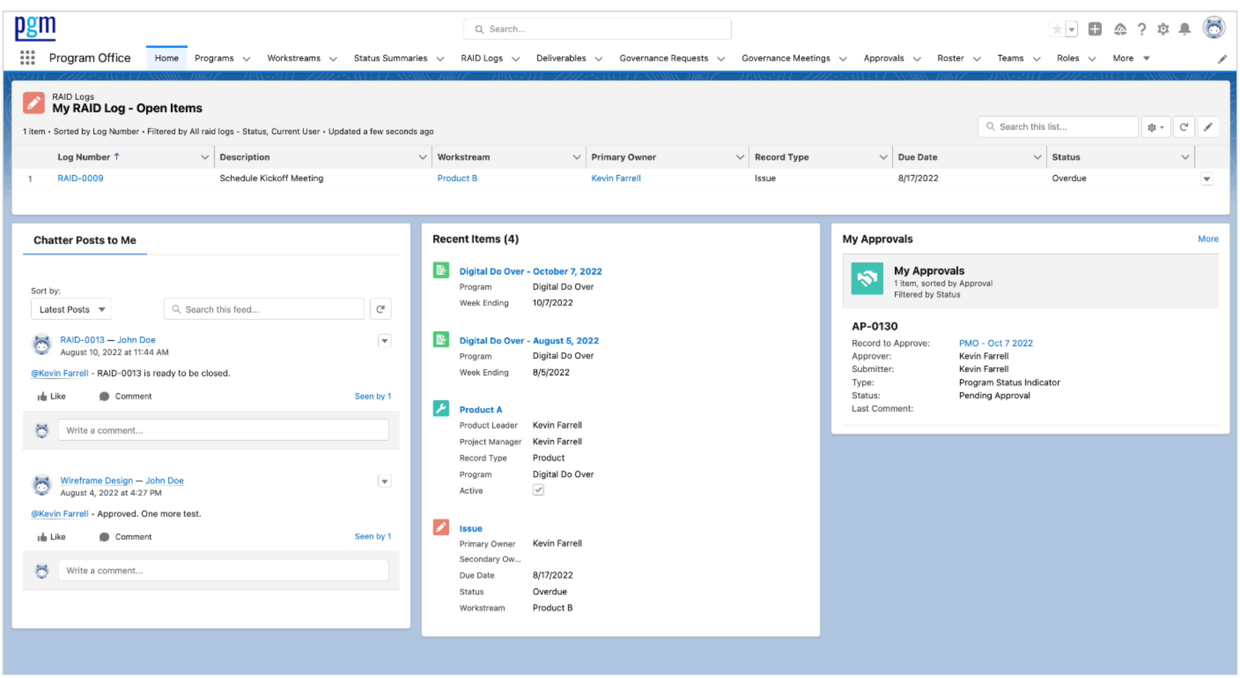
Once a status indicator is complete, it should be submitted for approval using the **Submit Status** button. The approval process is ad hoc allowing the user select whomever they feel is appropriate to provide the approval. The workstream's Project Leader is the most likely approver but the system is flexible. Also, a **Comment** can be entered by the user submitting.



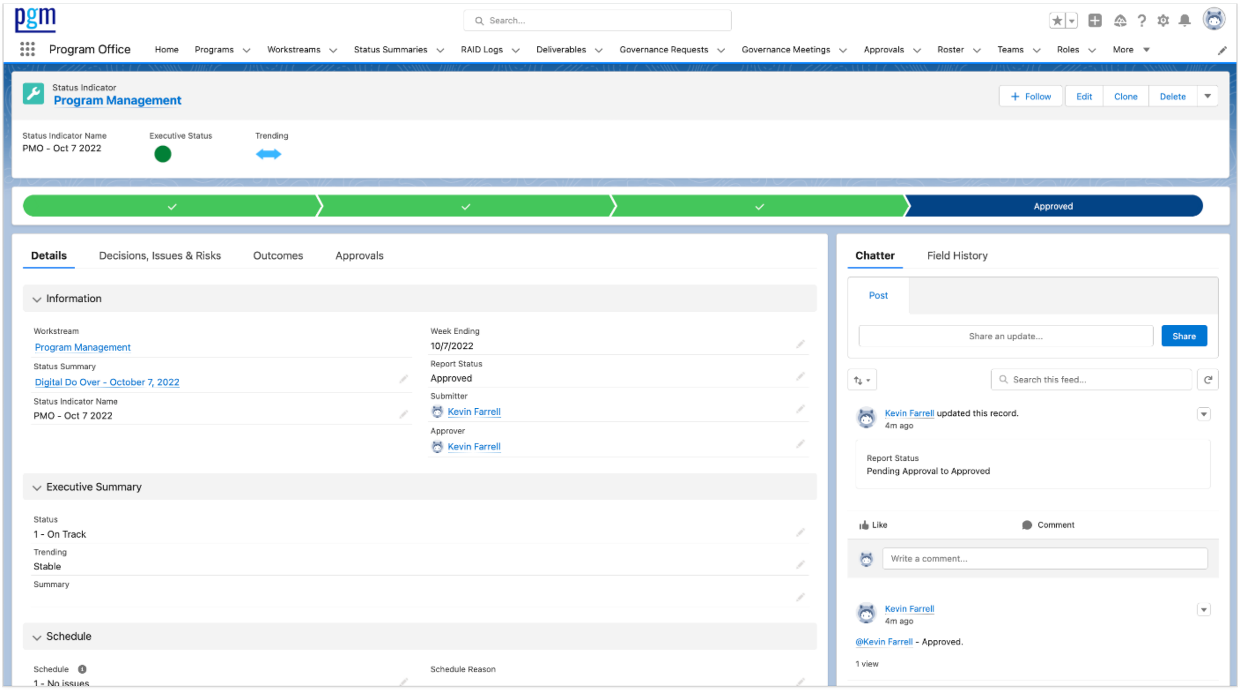
The approver is notified through Chatter and may either **Approve Status** or **Reject Status.** The Report Status is automatically updated to Pending Approval and the **Submitter** and **Approver** are displayed in the Information attributes.



In addition to the Chatter notification, the Approver can see the request on the **Home** page in the **My Approvals** section.



When the Approver either Approves or Rejects the Status Indicator, the Submitter is notified through Chatter and the Report Status is automatically updated. If the record is Approved, it is also locked so that no further changes can be made to the record. If Rejected, the record is not locked and the Submitter may make further revisions and resubmit for Approval.



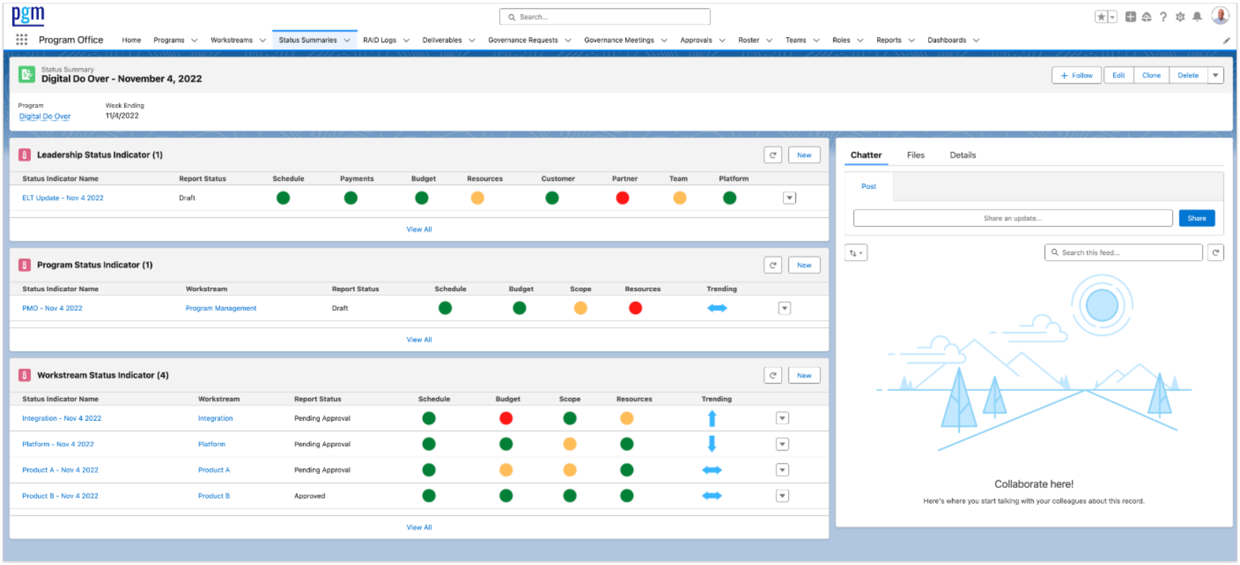
STATUS LIFECYCLE

The lifecycle of a Status Indicator is up to the PMO to determine. Nonetheless, best practice is to write a draft on Wednesday or Thursday by the workstream's Project Manager or equivalent. Route for approval on Thursday afternoon with final approval by Thursday EOD. On Friday, the PMO reviews all of the status indicators and then follows whatever communication mechanisms are appropriate for sharing the information with program leaders and business stakeholders.

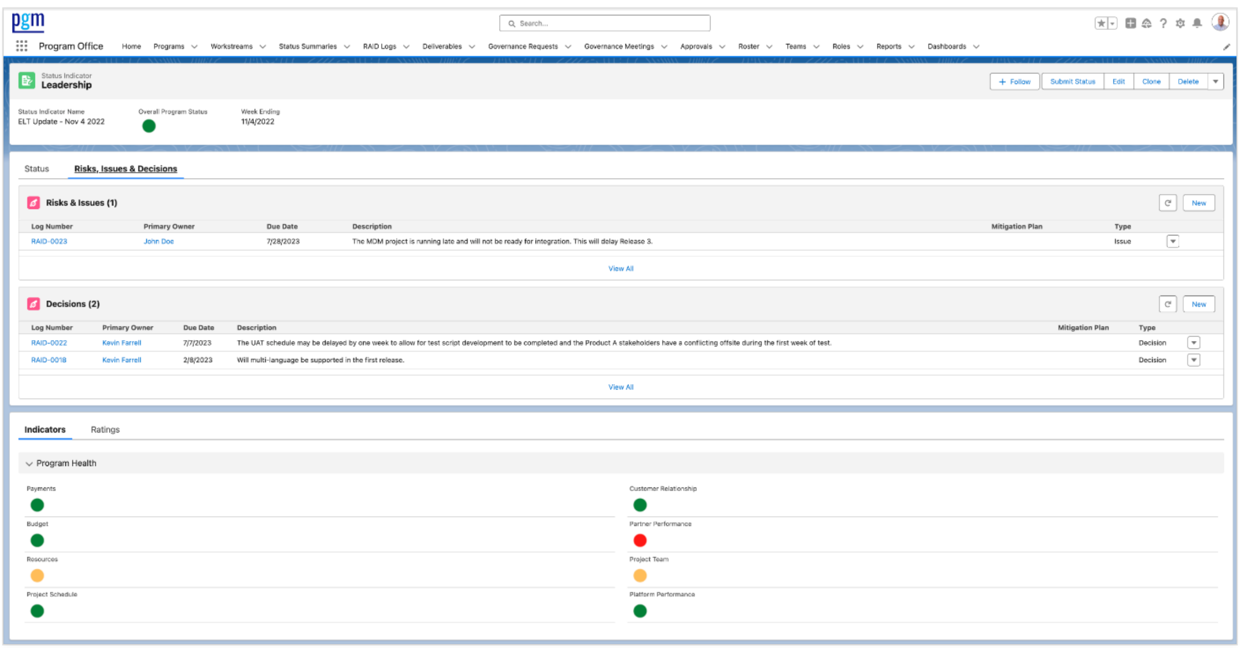
LEADERSHIP STATUS

The Leadership Status Indicator is a special case status report for providing status to senior executives. Most senior executives are not likely to be direct users of Program Office; instead they will require a "one pager" summarizing the overall status for the week or month. The Leadership Status Indicator provides a way for the PMO to create a status report tailored to senior managers and use the content to generate output with a document composition tool (e.g., S-Docs, DocGen).

The **Leadership** record type offers some of the same features of the normal Status Indicator such as an **Executive Summary**, **Accomplishments** and **Plans for Next Week**, and some new R/A/G attributes for **Payments**, **Budget**, **Resources**, **Product Schedule**, **Customer Relationship**, **Partner Performance**, **Project Team**, and **Platform Performance**.



The Leadership Status Indicator also incorporates any **Risks**, **Issues** and **Decisions** from the RAID Log that have been elevated to “Leadership” visibility.



The intent of the Leadership Status Indicator is for the PMO to elevate the information that has been contributed by the workstreams and synthesize it into an overall program status. It should speak to the “big rocks”, key milestones, and any blockers that a program may be facing.

RAID Log

The RAID Log is used to manage **Risks**, **Issues**, **Action Items** and **Decisions** for the program each having its own record type with the appropriate attributes and page layouts. The attributes common to all four types include **Workstream**, **Primary Owner**, **Secondary Owner**, **Status**, **Description** and **Due Date**. The Workstream is a lookup to the Workstream object and associated with the RAID item. Program-wide RAID items should be associated with a PMO-related Workstream. The Primary Owner is the person responsible for the RAID item with the Secondary Owner assisting or supporting in some capacity.

Secondary Owner is not required. The Status defaults to Open and is automatically set to Overdue if the item is not marked Closed by the Due Date. The Status of Closed - Pending Review is a special case and is documented below.

NOTIFICATION

When a RAID item is created the Primary and Secondary Owners are notified by email. A reminder email is sent to the Primary Owner two days before the Due Date, and then a daily email is sent to the Primary Owner when Overdue.

The Creator receives an email when a RAID item is Closed.

IMPACTED WORKSTREAM

RAID items are the responsibility of the assigned Primary Owner and Workstream to resolve. The **Impacted Workstreams** list any Workstream that may have a dependency on the outcome of the RAID item. They need to be informed of progress and resolution.

RELATED RAID ITEMS

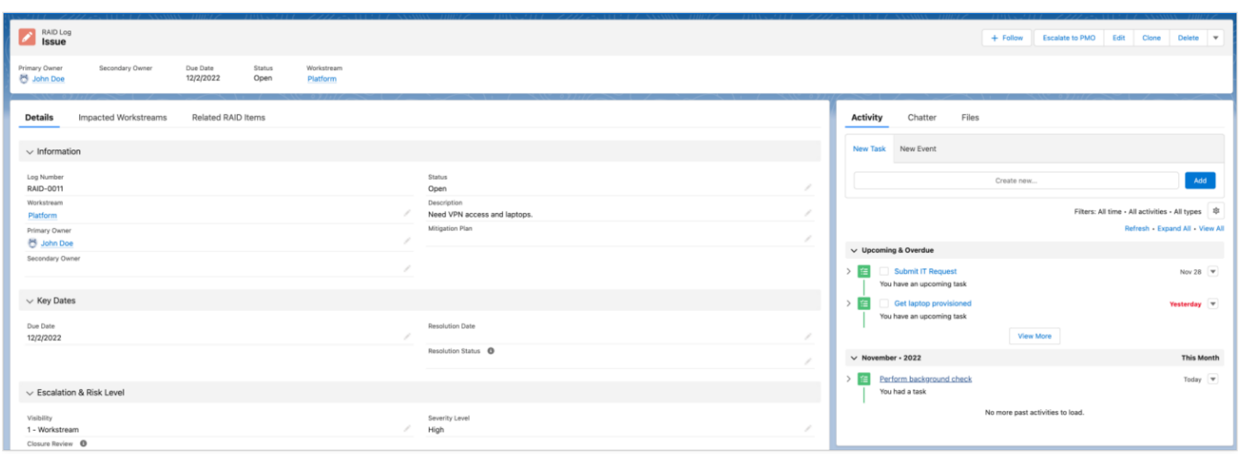
The **Related RAID Items** are a list of other RAID items that have an association with a RAID item. For instance, a Issue could have one or more Action Items related to it for tasks being done to resolve the Issue.

SYSTEM INFORMATION

When a RAID item is Closed the system automatically updates the **Closed By** and **Close Date** fields. The **Original Due Date** is set to the Due Date when a RAID item is created. The Due Date may change as a RAID item ages, but the Original Due Date will show the initial value. In addition, the **Due Date Changes** is a counter to indicate the number of times a Due Date has been modified.

ACTIVITY FEED

The Activity Feed tracks the steps that will be taken or work to be done in order to resolve a RAID item. Create Tasks and Events to document the activities and then complete them accordingly. Activities can be assigned to different people - not just the Primary Owner - to ensure that the RAID item is resolved by the Due Date.



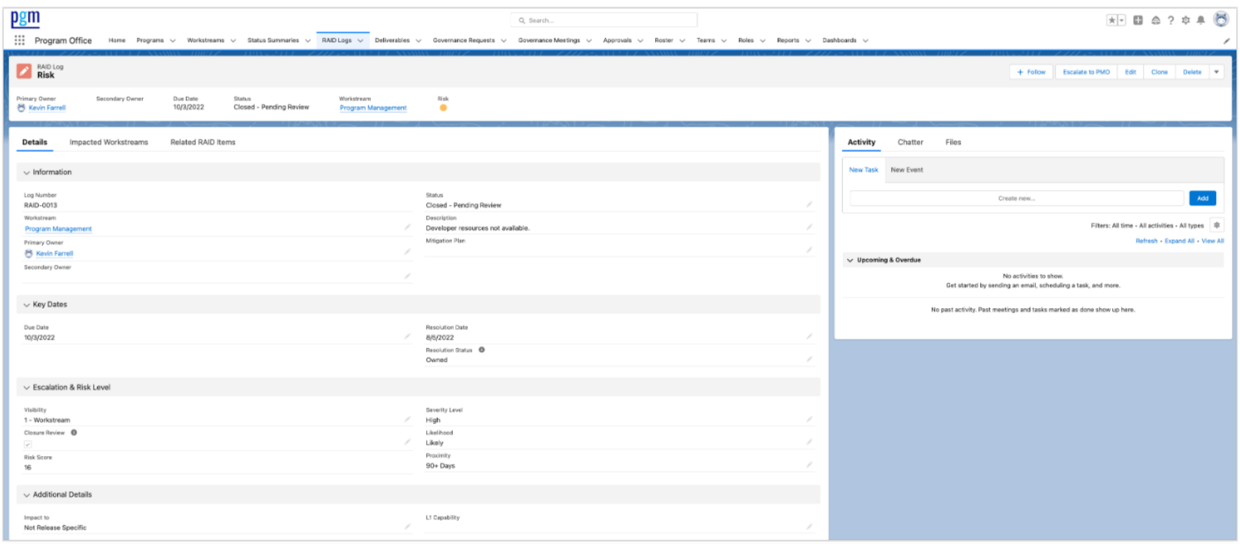
RISKS

A Risk is the primary item in the RAID Log to identify risks and take mitigating actions to avoid them coming to reality.

The **Severity Level**, **Likelihood** and **Proximity** combine together to create **Risk Score**. The Severity Level describes how significant the impact will be on the program if the risk is not resolved. Options range from Insignificant to Extreme. The Likelihood is the probability that the risk will come to fruition and the Proximity determines how soon. Likelihood options range from Rare to Certain and Proximity ranges from Less Than 7 Days to 90+ Days. The Risk Score is calculated by multiply the numbers together provide a comparative attribute for reporting.

The **Visibility** defaults to Workstream for all RAID items. Risks with Visibility at a Workstream level are being managed by the workstream team and do not require any escalation. If a Risk has cross-workstream impacts or dependencies or needs greater attention beyond the workstream team, then the Visibility is elevated to PMO. Clicking the **Escalate to PMO** button changes the Visibility to PMO and automatically notifies the Program Managers and workstream Product Leader and Project Manager through Chatter. Also, once an item has been escalated to the PMO, the Status field can only be set to **Closed** by a Program Manager. Everyone else must set Status to **Closed - Pending Review** and notification posted to Chatter to the Program Managers that an item is ready for review.

NOTE: *in Setup > Users > Roles you can designate one or more Program Managers.*



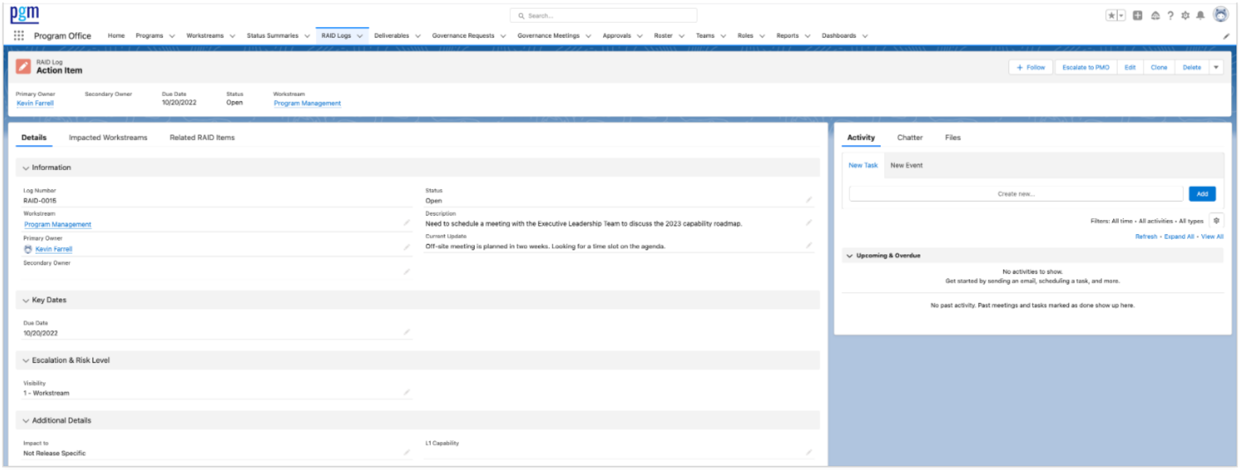
The plan to avoid a Risk is documented in the **Mitigation Plan**, and when the Status is eventually Closed, the **Resolution Date** and **Resolution Status** become required to document how the Risk was resolved. The **Impact To** and **L1 Capability** are reporting attributes used for grouping by release and capability.

Closure Review

Closure Review is an optional feature for the **Creator** of a Risk or Issue. When checked, a validation rule will only allow the person who created a RAID item to **Closed** it. Everyone else must set Status to **Closed - Pending Review**. This allows the a Creator of a RAID item to review the work of the Primary Owner before closure.

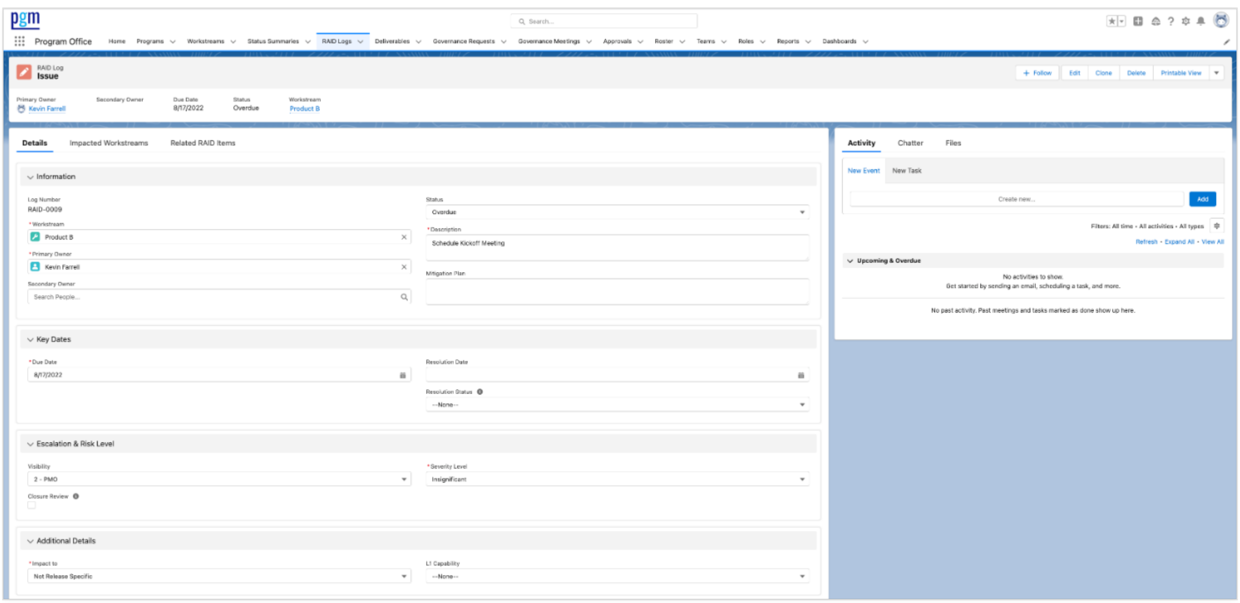
ACTION ITEMS

An Action Item is the simplest of RAID Log items with a **Description** and **Current Update** of a task or activity that needs to be completed.



ISSUES

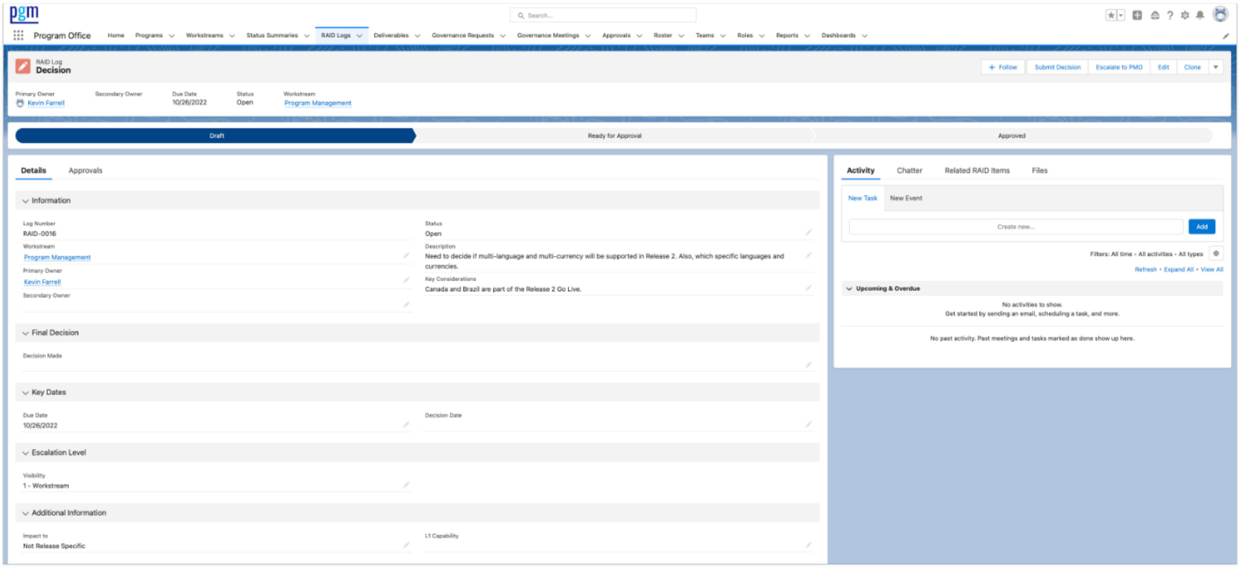
Issues are challenges or problems that the program is currently experiencing. They no longer have a Likelihood or a Proximity because they have occurred and now the **Severity Level** is the only attribute used. While the issue is being resolved a **Mitigation Plan** can be leveraged to lessen the impact of the issue. When an issue is closed, the **Resolution Date** and **Resolution Status** become required to document how the issue was resolved.



The **Visibility** defaults to Workstream and can be escalated to the PMO. The **Impact To** and **L1 Capability** are reporting attributes used for grouping dashboards and reports.

DECISIONS

Decisions are used to document any key decision made by a program team member or committee that has a material impact on scope, schedule, budget or resources. A Decision RAID item can be created *in advance* to document a decision that is needed by a Due Date or it can be used *in arrears* to document a decision that was made.



The **Description** and **Key Considerations** define the decision that is needed. The **Decision Made** documents the resulting decision made by the Primary Owner or committee. The **Due Date** is used to track a when a decision is required in the future; complemented by the **Decision Date** when it was actually made.

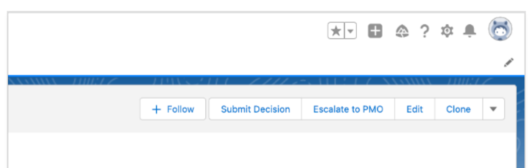
When a decision is made but was not already being tracked in the RAID Log, then a Decision RAID is created in arrears. When recording the decision in the RAID log, the **Description**, **Decision Make**, **Due Date**, and **Decision Date** are completed together and the Due Date and Decision Date are the same.

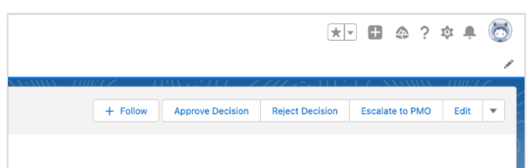
The **Primary Owner** is set to the decision maker. If the decision is by committee (ARB, Change Control) then whoever leads the committee is the decision maker.

Approvals

Once a Decision is complete, it is routed for approval by the Primary Owner. This ensures that the decision maker agrees with the how the Decision Made attribute is written and upon approval locks the record so that it cannot be changed.

The **Submit Decision** button routes the RAID item to the Primary Owner and updates the Status to **Ready for Approval**. The Primary Owner is notified through Chatter when record is ready for review.





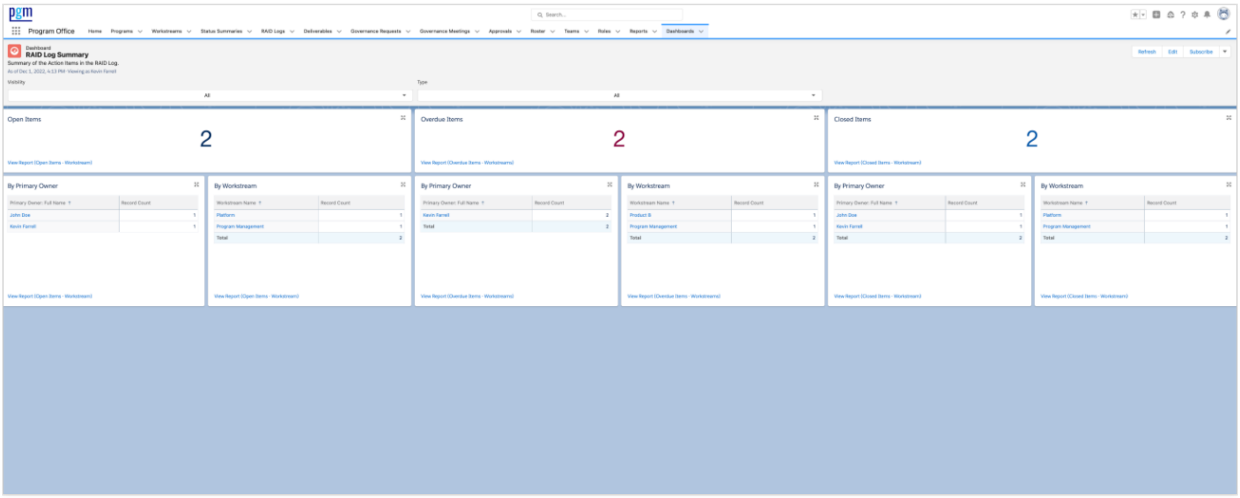
The Primary Owner can **Approve Decision** as-is or make changes to the Decision Made field and then approve. The Status is updated to **Approved** and the Submitter is notified in Chatter.

The Primary Owner can also **Reject Decision** if they disagree with how the Decision Made is written and send it back for further revision. The Status is changed to **Draft** and the Submitter is notified in Chatter.

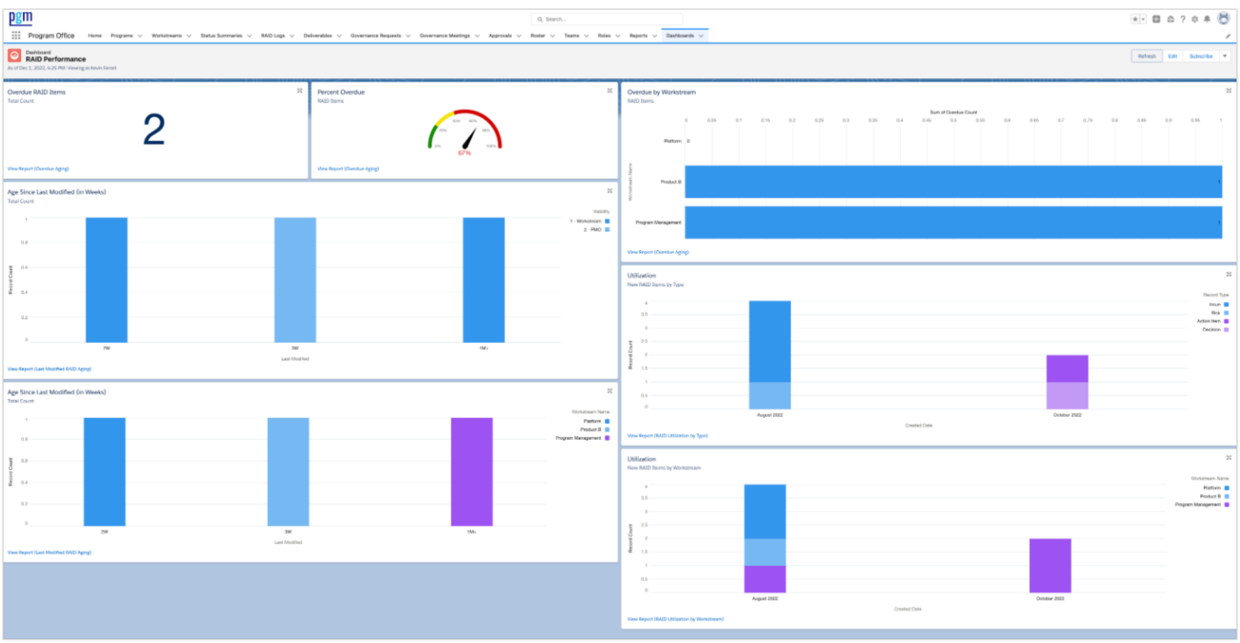
DASHBOARDS

There are three dashboards for managing the RAID Log including **RAID Log Summary**, **RAID Performance**, and **RAID Log**

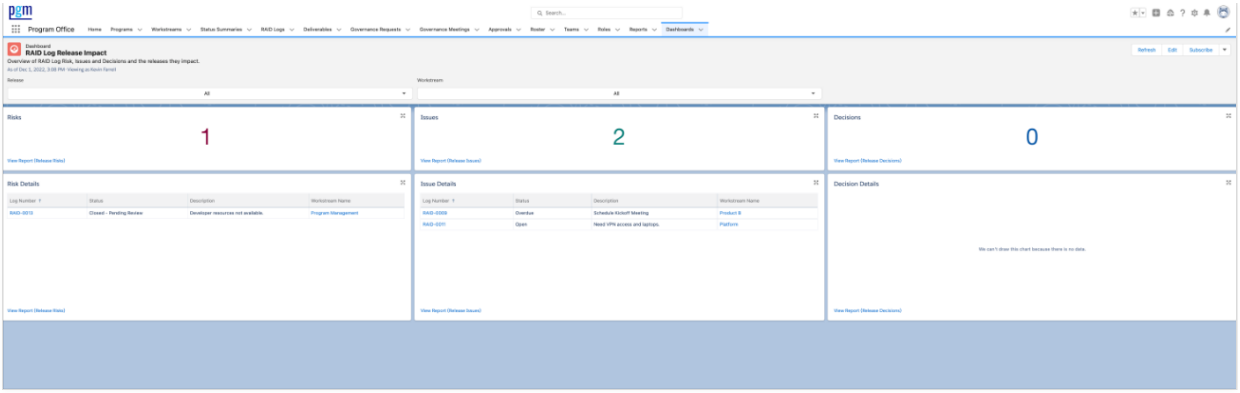
Release Impact. The RAID Log Summary provides a view of the Open, Overdue and Closed items by Primary Owner and Workstream.



The RAID Performance shows the number of overdue RAID items, utilization by workstream and type, and aging by visibility and workstream.

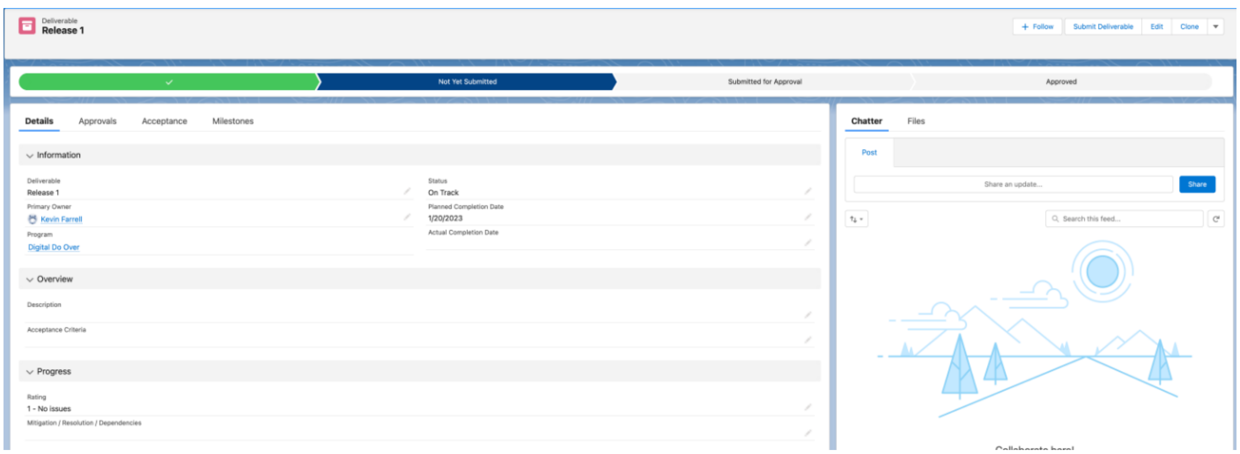


The RAID Log Release Impact provides a view of Risk, Issues, and Decisions by release and workstream.



Deliverables

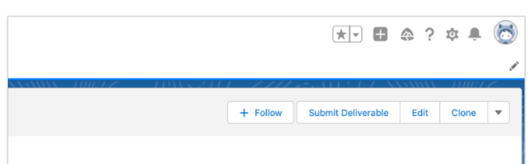
Deliverables are used to track the acceptance of a program's deliverables described in a Statement of Work. They are the products or releases that are too be produced in order to fulfill the scope of the program. Acceptance of a deliverable is typically approved by the customer's program leader upon validation or testing by the customer's key stakeholders.

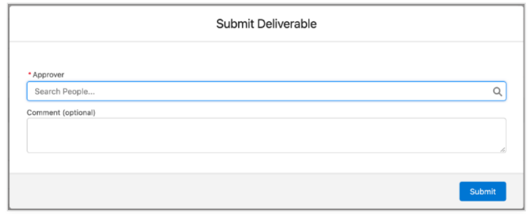


A Deliverable record consists of a **Deliverable** name, **Status**, **Planned Completion Date**, **Actual Completion Date**, **Primary Owner**, **Description**, and **Acceptance Criteria**. At the beginning of a program, a Deliverable record should be created for each deliverable to be produced.

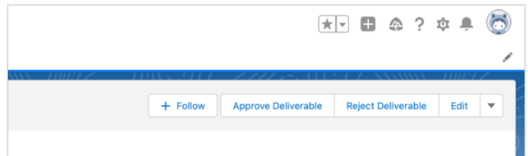
The **Status** attribute is a picklist field including the following options: **On Track, Complete, Overdue, Blocked, and Running Late**. The Status is intended to provide a high-level assessment of the deliverable's progress. Optionally, progress can be fully documented with the **Rating** and **Mitigation/Resolution/Dependencies** fields to provide a more robust description of what issues, dependencies, and further actions are impacting a deliverable's completion.

When a Deliverable is complete it should be submitted to the **Primary Owner** for approval. The **Submit Deliverable** button prompts the user for the name of the approver and an optional comment. It does not automatically route to the **Primary Owner.** If the Primary Owner is not available a different user can be selected.





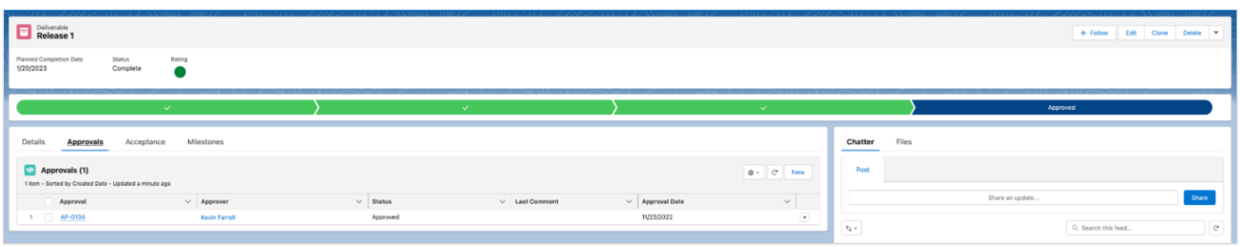
The approver is notified through Chatter (and email if enabled) when an item is sent for approval. The approver can select either the **Approve Deliverable** or **Reject Deliverable** button as appropriate. If approved, the Deliverable record is set to Approved status and locked, and if rejected, the Deliverable record is set to Rejected status and remains unlocked.



The Submitter is notified through Chatter when the Approver makes a decision to Approve or Reject.

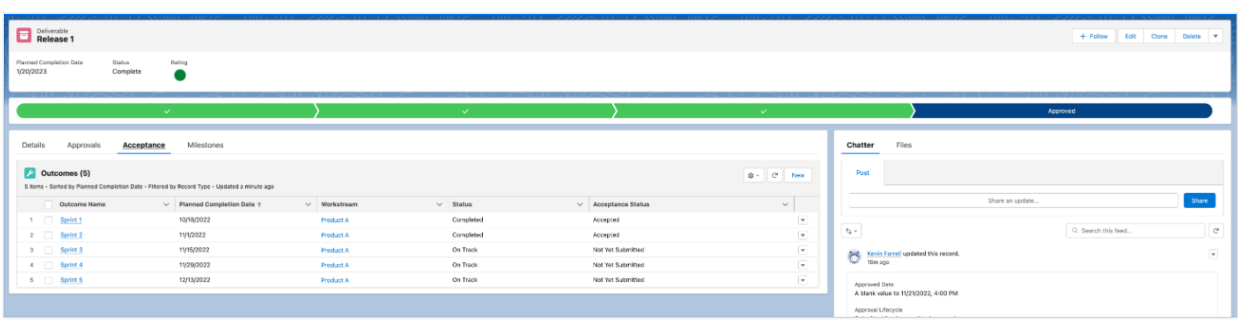
APPROVALS

A full history of the approval process is displayed on the **Approvals** tab including the name of the Approver, the action taken (Approve/Reject), the date and any comment made. In the Detail page, the Submitter is also displayed.

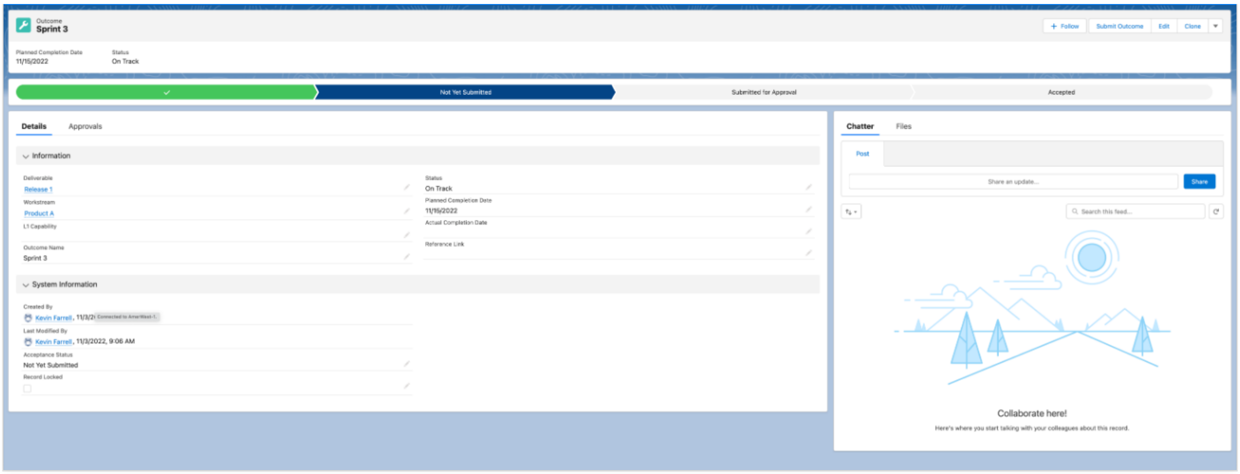


ACCEPTANCE OUTCOMES

Acceptance Outcomes are the supporting milestones that must be produced in order to complete a Deliverable. They follow a similar approval flow to Deliverables and can link to the artifact being approved.

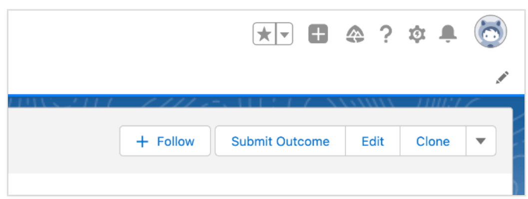


An Acceptance Outcome record consists of the **Outcome Name**, **Status**, **Planned Completion Date**, and **Actual Completion Date**. Optional fields include a **Reference Link** to a document stored in a repository (e.g., Confluence) and **L1 Capability** for reporting. There is no Primary Owner.



Acceptance Outcome records should be created when a customer's acceptance is required. Examples of Acceptance Outcomes include sprints, solution architecture specifications, integration patterns, and wireframe designs. When a Acceptance Outcome is complete, it should be submitted to a relevant customer stakeholder for approval. Stakeholders often vary based on the type of artifact being approved; whoever has the relevant authority for approval is appropriate.

The **Submit Outcome** button prompts the user for the name of the Approver and an optional comment. The approver is notified through Chatter and has the option to **Approve Outcome** or **Reject Outcome**. If approved, the Acceptance Outcome record is set to Approved status and locked, and if rejected, the Acceptance Outcome record is set to Rejected status and remains unlocked.



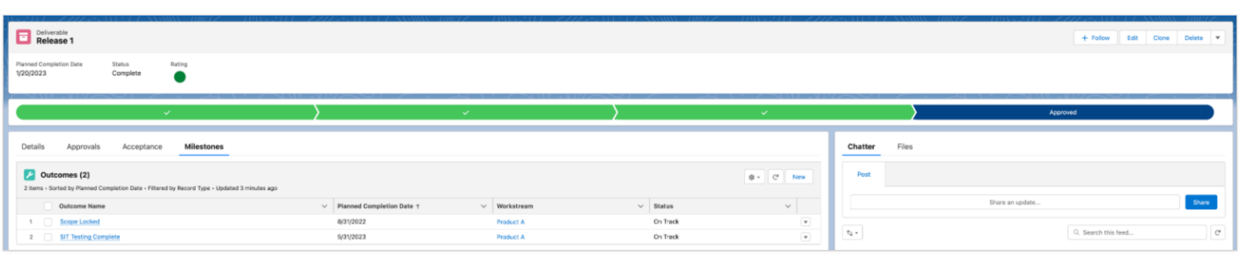
The Submitter is notified through Chatter when the Approver makes a decision to Approve or Reject.

Approvals

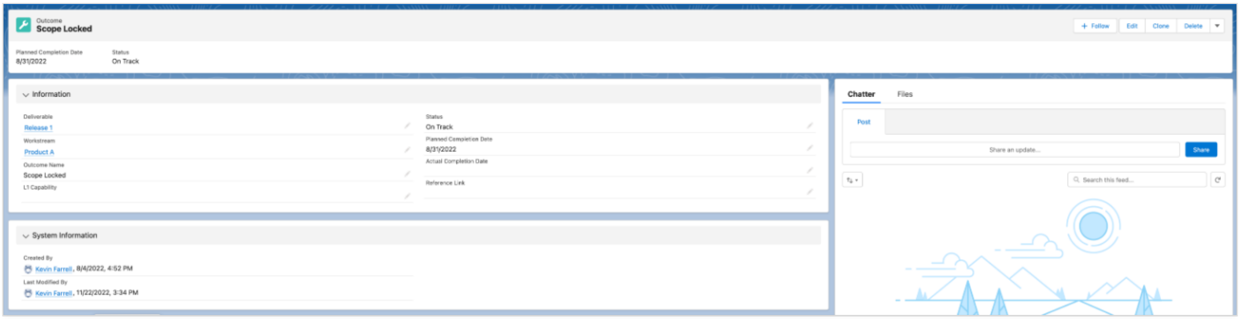
A full history of the approval process is displayed on the **Approvals** tab including the name of the Approver, the action taken (Approve/Reject), the date and any comment made. In the Detail page, the Submitter is also displayed.

MILESTONE OUTCOMES

Milestone Outcomes are also supporting milestones produced to complete a Deliverable, yet they do not require acceptance by a customer stakeholder. They track all of the same data including **Milestone Name**, **Status**, **Planned Completion Date**, **Actual Completion Date**, **Reference Link** and **L1 Capability**.



Milestone Outcomes should be create for the important dates that are part of a program plan and need to be tracked for timely completion. Examples include Program Kick-off, Scope Locked, SIT Testing Complete. The **Status** field provides a high-level assessment of the milestone's progress (In Progress, Complete, Blocked, etc.). More detailed planning and a work breakdown structure can be handled in a project management tool such as Smartsheet.



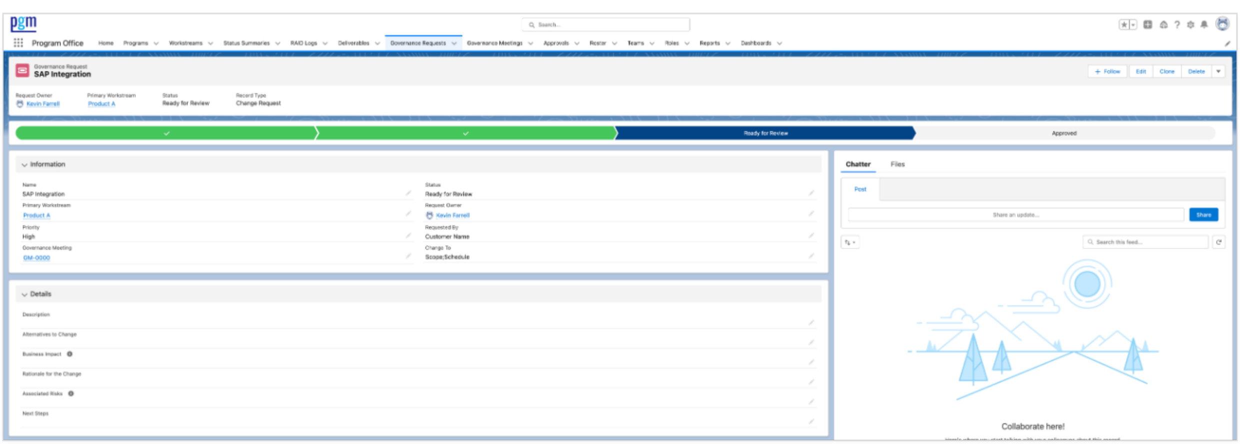
Governance Requests

Governance Requests manage reviews of scope and architecture as part of a program's governance model. **Change Control** requests document modifications to scope - either swapping of capabilities or expansion to include new capabilities, and **Architecture Review** requests evaluate technical, data, and integration design considerations for how a solution is built. Both Change Control and Architecture Review requests are evaluated by the relevant governance boards and the outcome/decisions of those meetings are captured in the **Governance Meetings**, which is described in the next section.

CHANGE REQUESTS

Change Requests consist of basic information about the request itself along with detailed information describing the change. The basic information includes the **Name**, **Primary Workstream**, **Priority**, **Status** and **Request Owner**. The Primary Workstream is the Workstream associated with the scope change. Priority reflects the importance of the change. The Status indicates if the request is being Drafted, Ready for Review, In Review, or has been Approved or Rejected. The Request Owner is the primary point of contact for the change but does not necessarily need to be the author of the record (Created By), and the **Requested By**** refers to who initiated a request. The **Change To** refers to the nature of the change - Scope, Schedule or Budget, and the **Governance Meeting** is a reference to the relevant Governance Meeting where the request was/will be discussed.

** The **Request By** picklist field should be updated in Setup with the appropriate Customer name and Vendors (i.e., Acme Inc and Salesforce) working on a program.

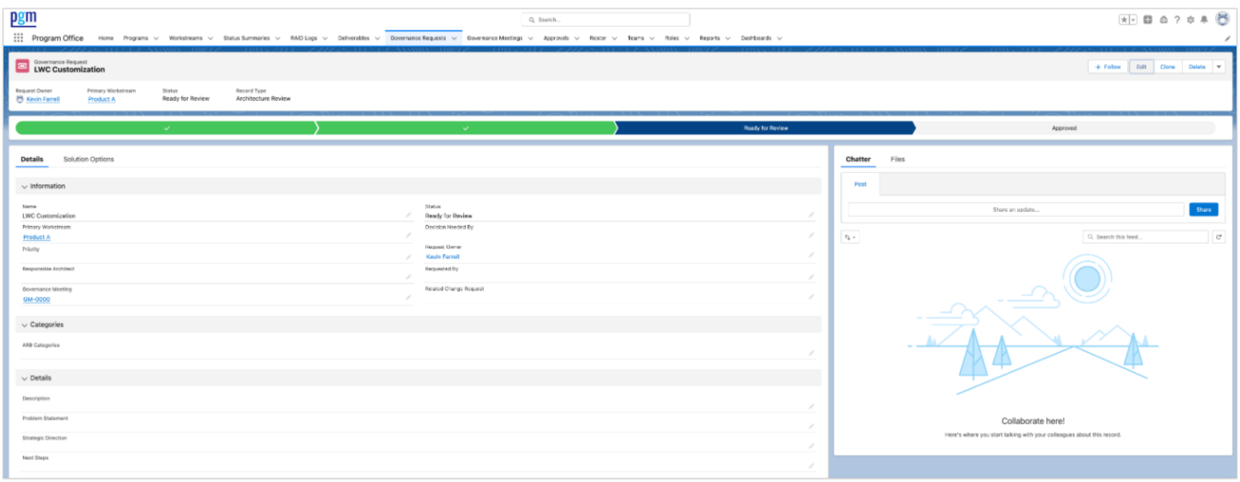


The **Details** section of a Change Request contains a **Description** of the scope change, the **Alternatives to Change**, the anticipated **Business Impact** of making the change and also *not* making the change, the supporting **Rationale for the**

Change, the **Associated Risks** to be considered when proceeding and not proceeding, and any **Next Steps.** All of these fields are rich text and can contain large narratives (32,768 characters). In addition, the **Files** tab lists any related content that is attached to the request.

ARCHITECT REVIEW

Architect Reviews consist of similar basic information about the request itself and detail information about the architectural issue to be solved. In addition, Architect Reviews have child records describing the various **Solution Options** being considered to address the architectural issue. The basic information includes the **Name**, **Primary Workstream**, **Priority**, **Status, Request Owner** and **Request By**. All of these fields function the same as they do with a Change Request. Additional fields include **Decision Needed By**, **Responsible Architect**, **Related Change Request**. The Decision Needed By is a date field indicating the date by with the governing board needs to make a decision on a Solution Option in order for the program to proceed. The Responsible Architect is an optional field noting the lead architect supporting the Request Owner, and the Related Change Request is an optional field associating the Architect Review to a Change Request if they are related. The **Governance Meeting** is a reference to the relevant Governance Meeting where the request was/will be discussed.



The **ARB Categories** picklist field classifies the type of architectural issues associated with the Architect Review. The options include:

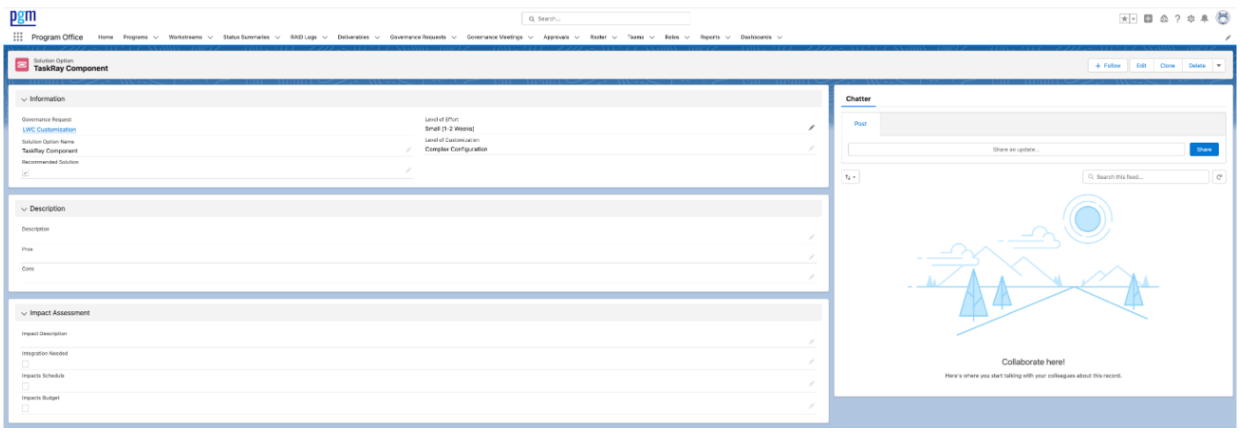
- Compliance Requirement
- Custom Interface Needed
- Expanded Scope
- High Customization
- High Data Volume
- High Performance Needed
- Info Sec / Security
- New/Changed L2 Capability
- New Business Unit/Orgs
- New Integration
- New System Replacement
- Significant Data Processing

Additions and changes can be made to the picklist options in Setup > Object Manager > Governance Meetings.

The **Details** section of an Architect Review contains a **Description** of the issue, the **Problem Statement** that needs to be solved, the **Strategic Direction** the customer is going with the technology and/or business and any **Next Steps** to be taken. All of these fields together provide a full picture of the architectural issue to be addressed. The **Solution Options** describe the alternatives to be considered when deciding how to best solve the issue. All of these fields are rich text and can contain large narratives (32,768 characters). In addition, the **Files** tab lists any related content that is attached to the request.

Solution Options

Solution Options are the alternative ways to address an architectural issue. One or more alternatives may be created and one can be recommended. A Solution Option record includes the **Solution Option Name**, **Level of Effort**, **Level of Customization**, a **Recommended Solution** checkbox, a **Description** and **Pros** and **Cons**. The Level of Effort is categorized into X-Small (< Week) through X-Large (>8 Weeks) and the Level of Customization ranges from Simple Configuration to Complex Customization and Non Salesforce Coding. The Description, Pros and Cons fields are rich text and can contain large narratives (32,768 characters).

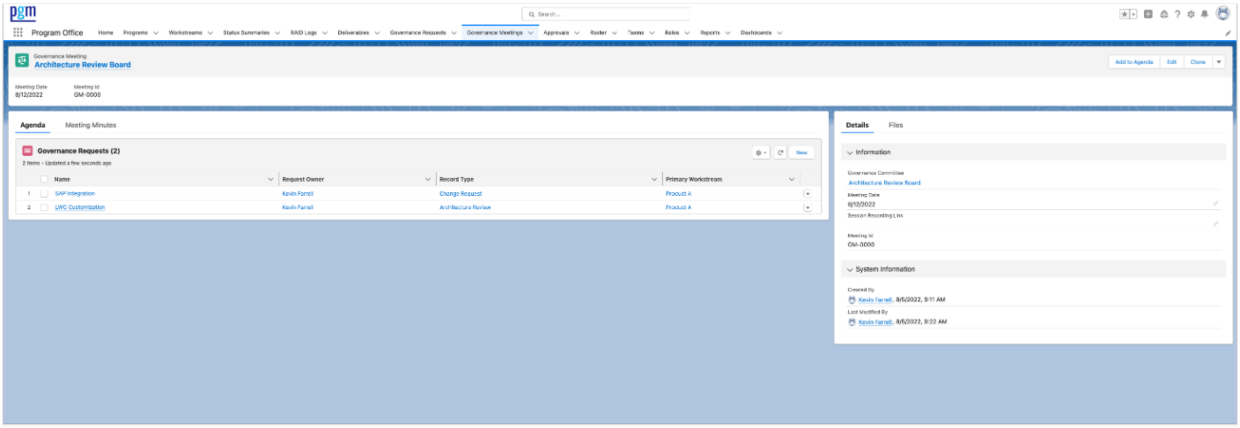


The **Impact Assessment** section provides more detail on how the solution would impact the workstream and Program. The **Impact Description** provides an assessment of how the level of effort and customization will effect scope and the backlog with specific impacts if **Integration Needed** and if there are **Impacts Schedule** or **Impacts Budget** considerations. Each of these fields has an additional narrative section if selected.

Governance Meetings

Every program should have a governance model with various leadership and oversight committees. A governance committee should be responsible for change control commonly known as the Change Control Board, and another for architecture review commonly known as the Architecture Review Board. Whatever the governance model is, the meetings of these committees are documented as **Governance Meeting** records.

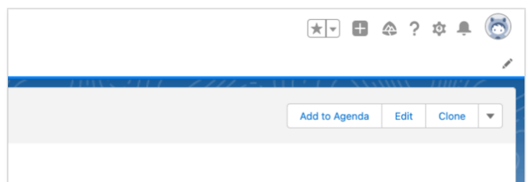
A Governance Meeting record includes a **Meeting Id**, the **Governance Committee**, the **Meeting Date** and a **Session Recording Link**. The Meeting Id is an auto-numbered field create by the system for every record. The Governance Committee is a Lookup field to the Team object. Only Governance (record type) committees from the Team object are listed. The Meeting Date is the date the committee gets together, and the Session Recording Link is a link to the recording of the meeting (if one exists).



AGENDA

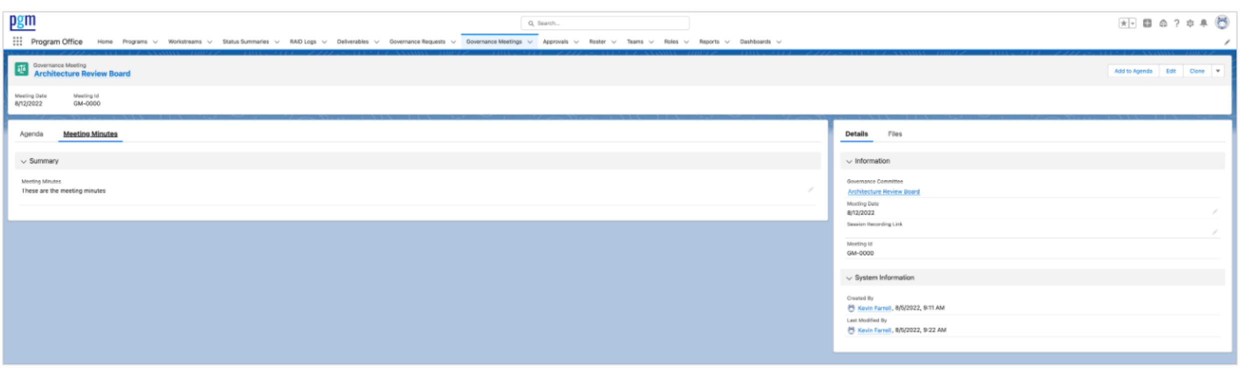
The Agenda is a related list of **Governance Requests** that will be discussed in a governance meeting. A Governance Request should be written up in advance of a meeting and then added to the agenda when **Ready for Review**. A request can be added to multiple Governance Meetings if on-going discussion is needed until it is ultimately **Approved** or **Rejected**.

To add a Governance Request to an Agenda, click the **Add to Agenda** button and select from the list of Governance Requests. The list is filtered for requests with a **Status** of **Ready for Review** and **In Review.** Also, a Governance Request may be added to an agenda directly from the request's Detail page by using the Governance Meeting Lookup field.



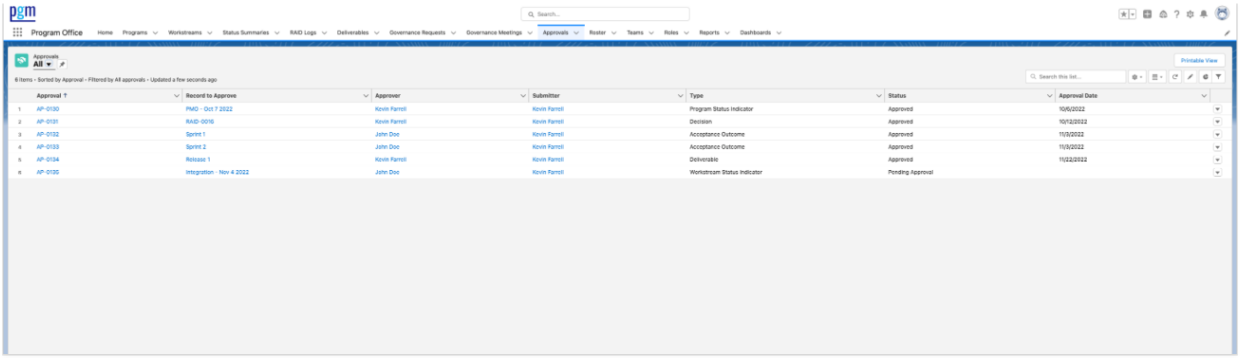
MEETING MINUTES

Meeting Minutes are used to capture the salient details of the Governance Meeting. The minutes are stored as part of the Governance Meeting record. Additional attachments can also be uploaded to the **Files** related list.



Approvals

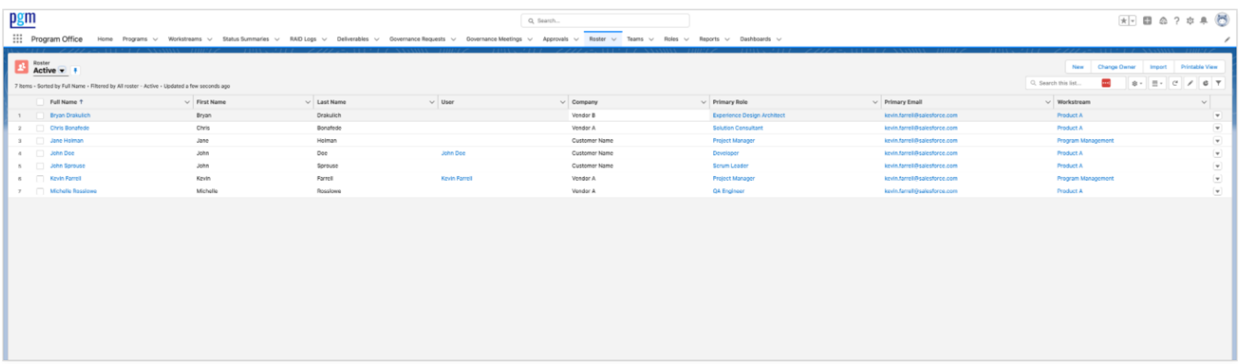
The Approvals tab provides a consolidated list of all approval processes in one place. Approvals for weekly status indicators, decisions, deliverables and acceptance outcomes are listed here in addition to the individual records to which they are related. The **My Approvals** list view displays records where the current user is the Approver (regardless of Status). The **All** list view displays all approval records.



Roster

The Roster lists everyone associated with a program, their company, role and contact information. The basic information for a Roster record includes **Full Name**, **First Name**, **Last Name**, **Primary Email**, **Secondary Email**, **Company**, **Workstream**, **Primary Role** and **User**. The Primary and Secondary Email fields are useful for vendors who have their company email addresses plus a customer email addresses. Company is a picklist field which should be updated (in Setup) with the customer name and any vendors working on the program. Primary Role is a Lookup field from the **Roles** object and User is a Lookup field from the standard **User** object. Not everyone listed in the Roster needs to be a User of the system, but for those that are they can be associated with their user account.

The **Active** field is used to indicate if a person is still an active team member on a program. When a person rolls off the program, unchecking the Active field is the preferred way of tracking rather that deleting them entirely.

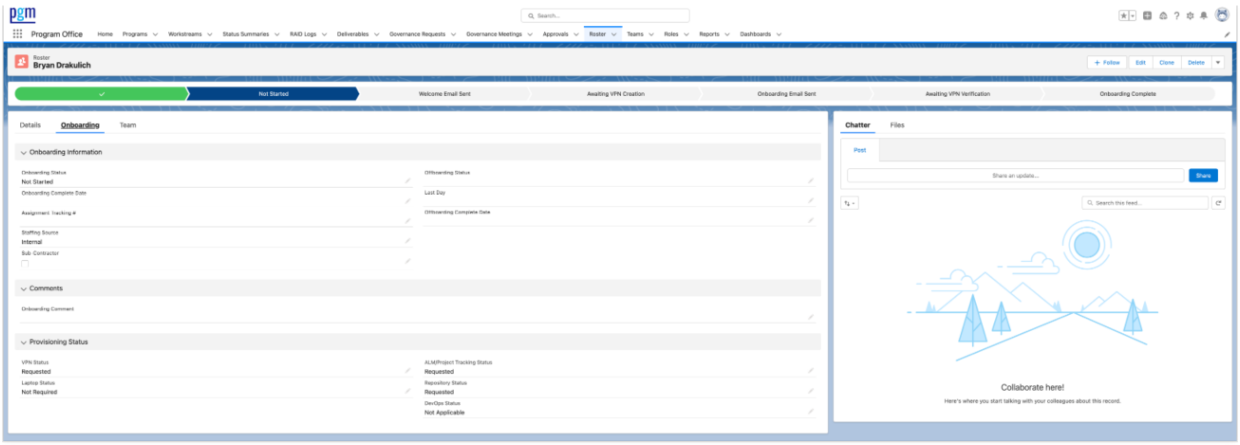


ONBOARDING

Onboarding is an optional feature that is used to track the on-boarding of vendors and subcontractors to the program. Presumably a customer's employees are already enabled with laptops and VPN access so the additional tracking is not necessary.

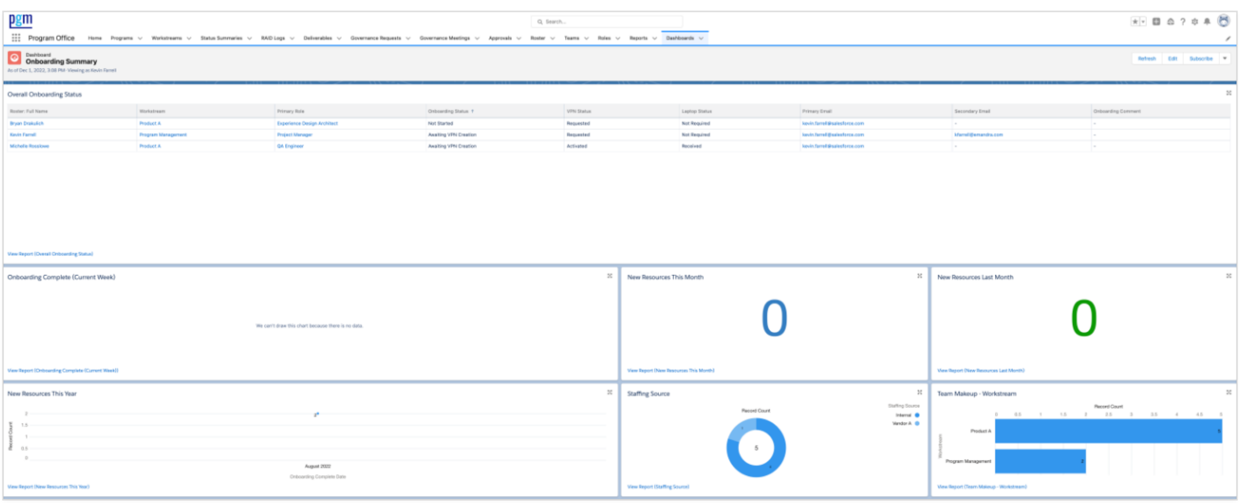
Onboarding consists of information about the resource and provisioning. The resource information includes **Onboarding Status**, **Onboarding Complete Date**, **Assignment Tracking #**, **Staffing Source**, **Sub-Contractor**, and **Comments**. Onboarding Status is used to track progress through the stages of the onboarding process. The default stages can be reconfigured to a customer's preferences in Setup. The default options include: **Not Started**, **Welcome Email Sent**, **Awaiting VPN Creation**, **Onboarding Email Sen**t, **Awaiting VPN Verification**, **Onboarding Complete**. The Assignment Tracking # is an optional field for referencing another ticketing system that may used in the process. Staffing Source should be configured in Setup as well to include the vendors and subcontractors that are part of the team.

Also, three off-boarding fields are available to track **Offboarding Status**, **Last Day**, and **Offboarding Complete Date**. The Offboarding Status may also be updated in Setup to match a customer's preferences.



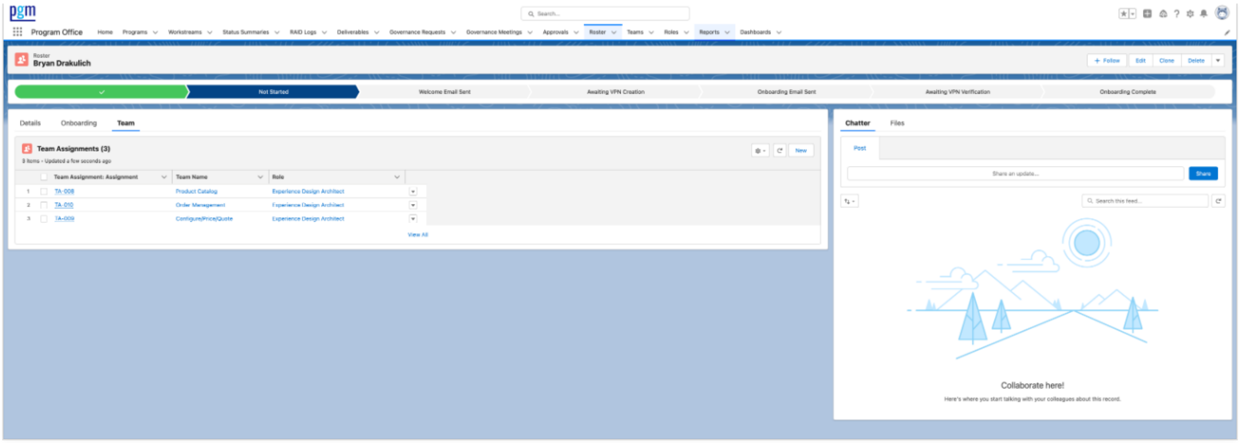
The Provisioning information includes **VPN Status**, **Laptop Status**, **ALM/Project Tracking Status**, **Repository Status** and **DevOps Status**. Each tracks the provisioning status of the essential tools needed on a program. Depending on one's role some or all may be necessary. Field labels can be updated in Setup to match a customer's preferences. For example, ALM/Project Tracking Status could be changed to Jira Status and Repository Status could be changed to Confluence Status.

An **Onboarding Summary** dashboard is available to provide an overview of all resources recently onboarded and track progress across resources. Access the Onboarding Summary through the **Dashboards** tab in the **Program Office Dashboards** folder.



TEAM

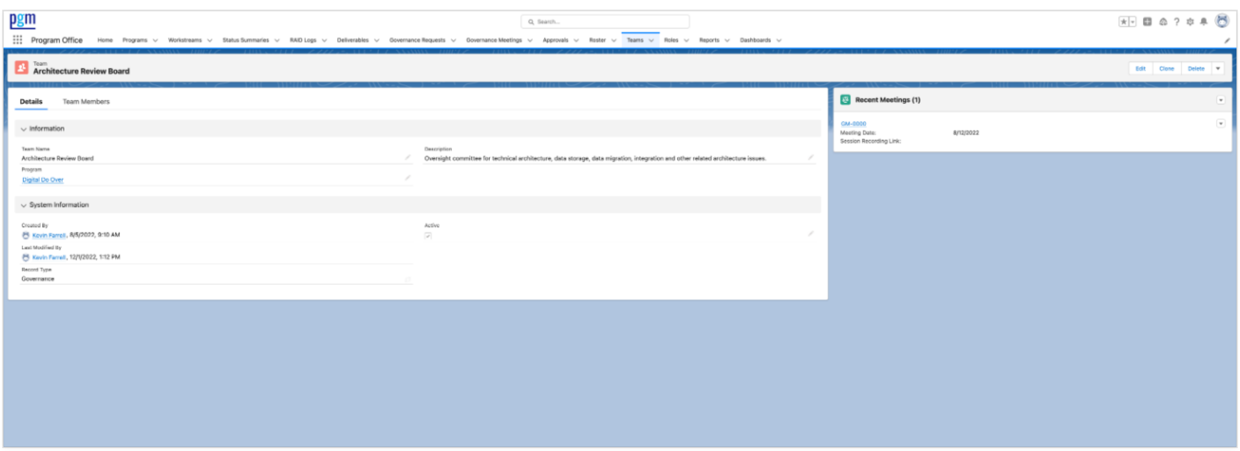
The Team tab shows the teams to which a resources is assigned. A resource can be assigned to multiple teams and can play the same or different roles on the teams. A resource's Primary Role from the Roster record does not have to be their role on a team. The Teams are defined in the Team object and can be either Governance or Operating teams.



Team

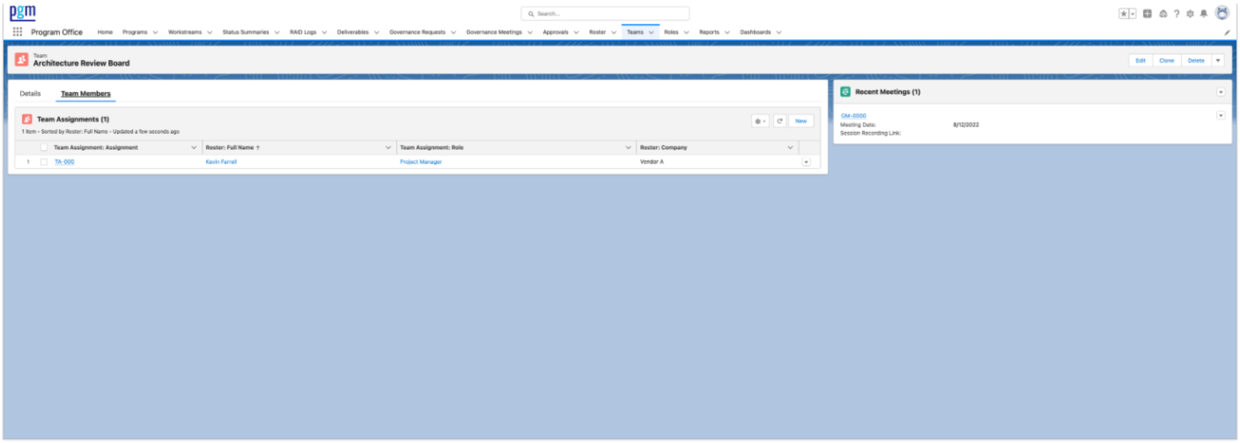
Teams represent the Operating and Governance teams that make up a program's structure. There are likely a small number of Governance teams - such as Change Control Board, Architecture Review Board, Executive Leadership, etc. And there are many Operating teams based on how granular a program needs to be tracked. For instance, an Operating team per workstream is helpful to manage all people on that workstream. In addition, Operating teams for scrum team 1 and scrum team 2 might also be useful for identifying the developers and QA testers on those teams.

A Team record consists of a **Team Name**, **Description**, and an **Active** flag. The record type defines a Governance or Operating team. The information is the same between Governance or Operating teams, but only Governance teams can be used with Governance Meetings. The **Recents Meetings** related list is displayed for Governance teams.



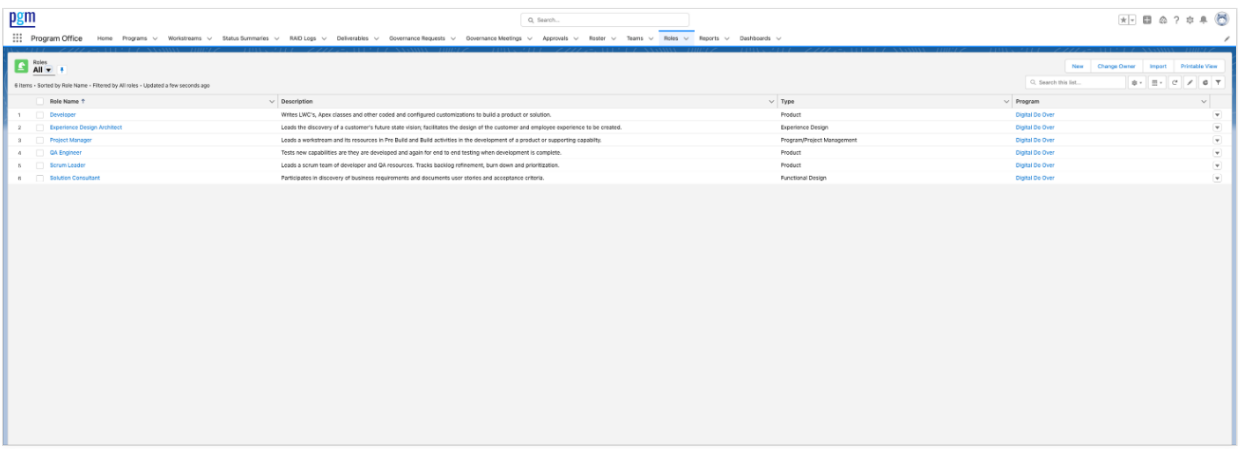
TEAM MEMBERS

Team Members are the Roster records assigned to a Team. Assignment can be initiated from the Roster record or from the Team Member tab on the Team record. Resources can be assigned to as many teams as necessary.



Roles

Roles describe the different functions and responsibilities that are represented on the program. The basic information includes **Role Name**, **Description**, and **Type.** Type provides grouping by functional area including Analytics, Change Management, Data, Experience Design, Functional Design, Integration, Leadership, Platform, Product, Program/Project Management. The picklist options can be updated to a customer's preferences in Setup.



The Role field is used as a Lookup field to the **Primary Role** attribute on the Roster record and also with the **Role** attribute on the Team Assignment record.