

Leveling Project & Portfolio Management @SandvikCoromant



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The journey to Antura Projects

- Antura POC: Platform requirements
- Checklist - functionalities

Antura Project configuration

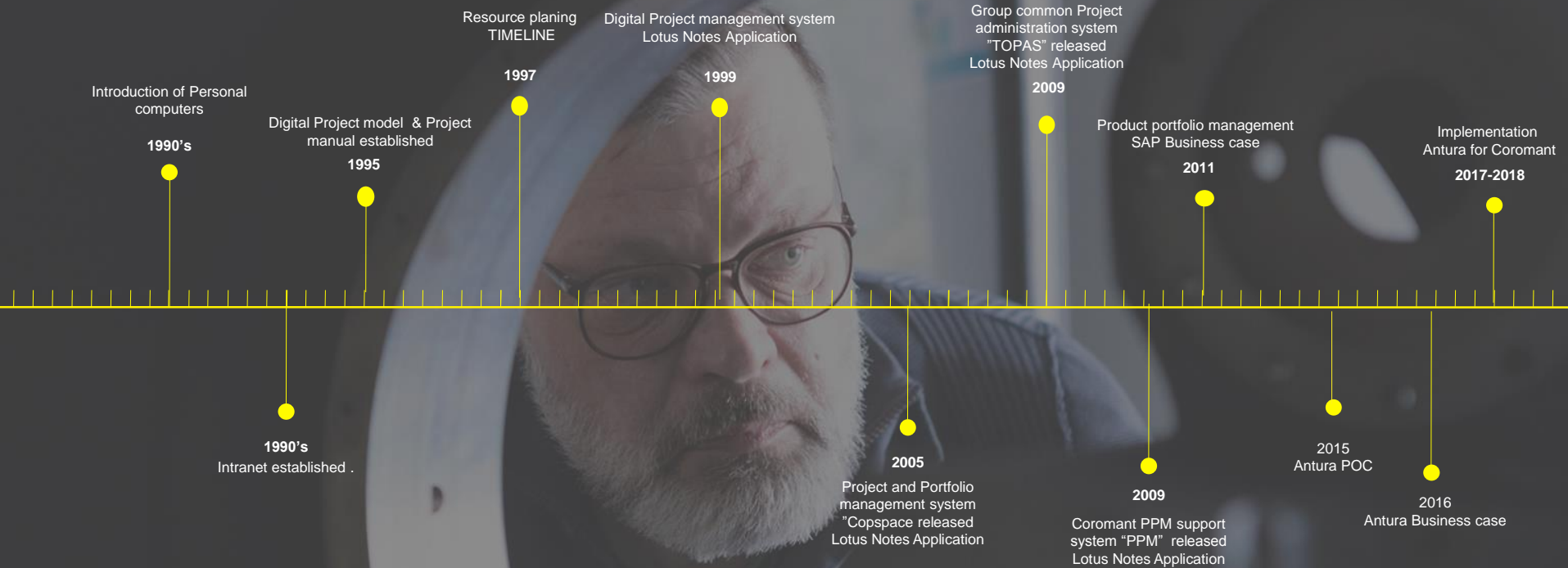
- Understand your needs & not only replicating solutions

Implementation strategy, step by step

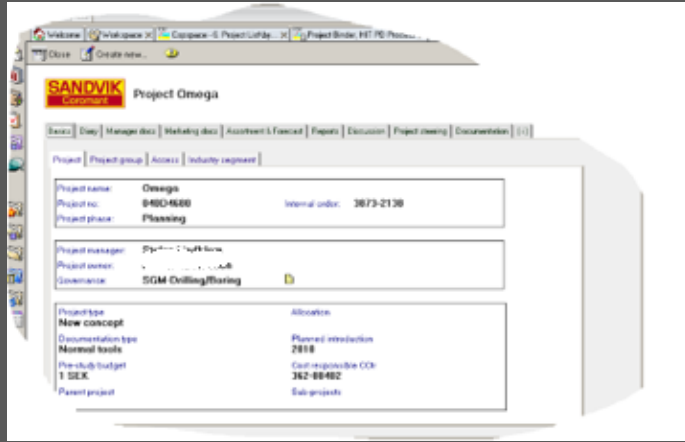
Benefits of using Antura Projects

Lessons learned

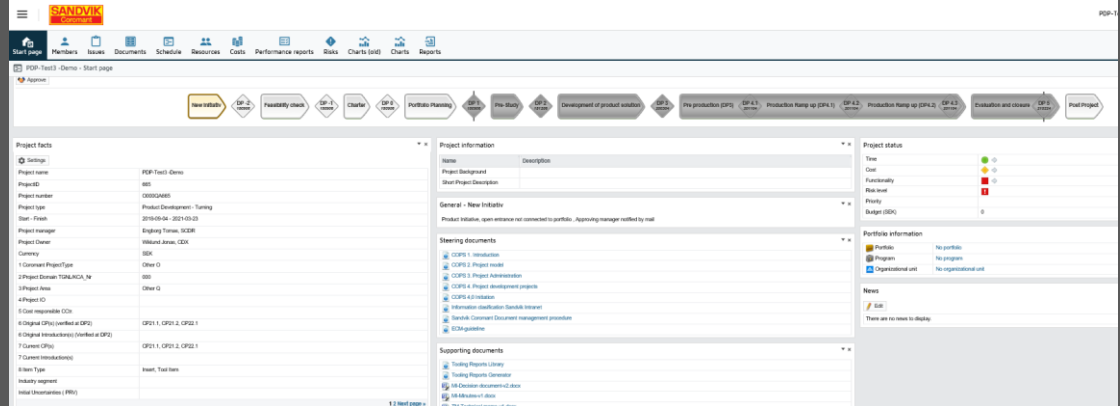
Our challenge



Platform requirements



- Support for existing functionalities
- Filling gaps missing functionalities



Platform requirements, cont.

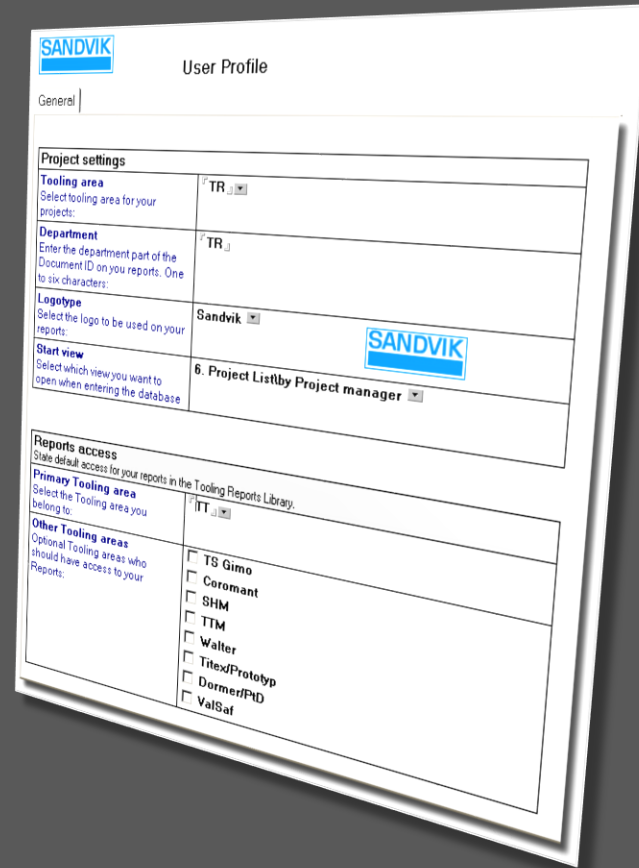


Main functionalities, TOPAS versus Antura Projects

Functionality	Antura Comp.	Comment
Project management : Working plans/ Milestones/Risks	+	Previously in separate documents
Budget & resource plans	+	Previously in separate documents not database integrated with working plan
Document management (Archiving)	+ (-)	Use of document properties is a prerequisite for reliable archiving Documents, Mandatory document properties need to be enforced by Antura.
Registration of Decisions	-	Previously automatic communication of decisions to project, not limited to non project phase related decisions.
Portfolio reports	+	Previously Time consuming to maintain

User Profile Settings

- Define who you are
- Set your start view
- Default values for your reports



The screenshot shows the 'User Profile' settings page for SANDVIK. It is divided into two main sections: 'Project settings' and 'Reports access'. The 'Project settings' section includes fields for 'Tooling area', 'Department', 'Logotype', and 'Start view'. The 'Reports access' section includes a 'Primary Tooling area' and a list of 'Other Tooling areas' with checkboxes.

Project settings	
Tooling area Select tooling area for your projects:	TR
Department Enter the department part of the Document ID on your reports. One to six characters:	TR
Logotype Select the logo to be used on your reports:	Sandvik
Start view Select which view you want to open when entering the database	6. Project Listby Project manager

Reports access	
State default access for your reports in the Tooling Reports Library.	
Primary Tooling area Select the Tooling area you belong to:	IT
Other Tooling areas Optional Tooling areas who should have access to your Reports:	<input type="checkbox"/> TS Gimo <input type="checkbox"/> Coromant <input type="checkbox"/> SHM <input type="checkbox"/> TTM <input type="checkbox"/> Walter <input type="checkbox"/> Titex/Protyp <input type="checkbox"/> Dormer/PUD <input type="checkbox"/> ValSaf

Document properties and archiving

Access control in the Tooling Reports Library ?

Document owner	Change	Access Level
TT		<input checked="" type="radio"/> Open <input type="radio"/> Restricted <input type="radio"/> Confidential
— or —		
Also available to	Add/Change	<input type="checkbox"/> This document is available to entire BA (Tooling)
TTM		Access Level
		<input type="radio"/> Open <input checked="" type="radio"/> Restricted <input type="radio"/> Confidential

TOPAS Archive




Document Properties and Archiving in Antura

Administration - System - System properties

New property

Property	Property type	Type	Choices
	Document	All	
<input checked="" type="checkbox"/> Distribution	Document	List	17
<input checked="" type="checkbox"/> Information class	Document	List	4
<input checked="" type="checkbox"/> Report Type	Document	List	22
<input checked="" type="checkbox"/> Sandvik Document type	Document	List	17

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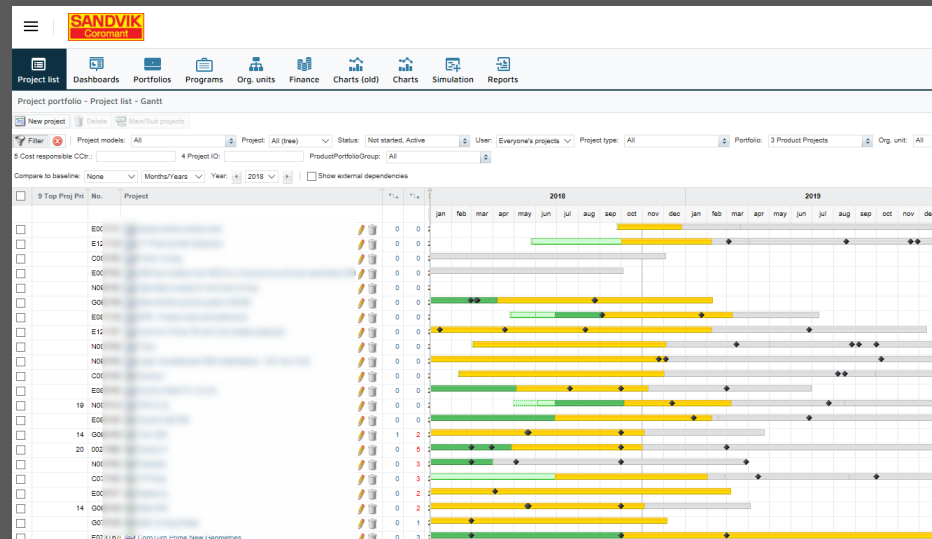
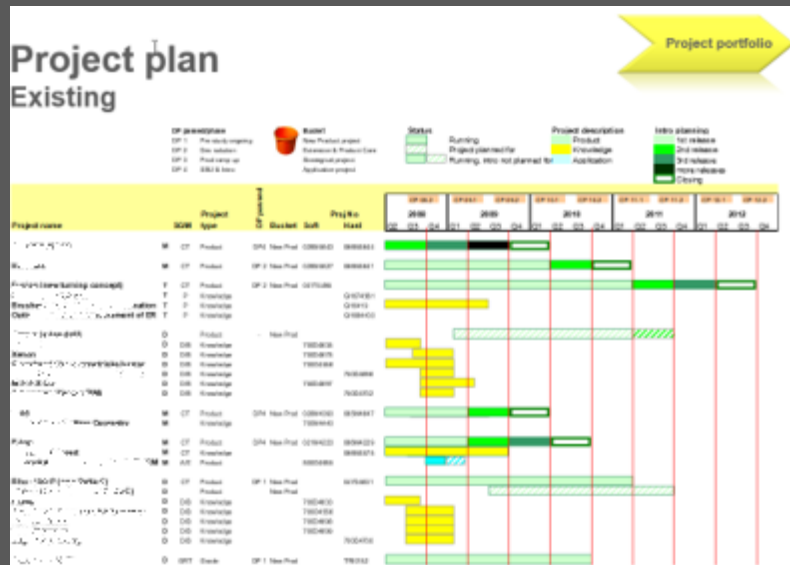
SG- DECISIONS

Report Type:

Subject <input type="text" value="Project name (name)"/>	Date <input type="text" value="Update date (text)"/>	Document Id. <input type="text" value="Update time (text)"/>	MI
Issued by <input type="text" value="User name (Click or tap here to enter text)"/>			
Signed		Telephone	
Date/Time			
Internal ref. (e.g project, customer, order, access code etc)		Place	
Sandvik Information class: <input type="text" value="Sandvik Information Class (text)"/>			
No. of appendices		Chairman Signed	
Document name <input type="text" value="Document name (text)"/>		Document version <input type="text" value="Document version (text)"/>	
Sandvik Document type: <input type="text" value="Document type (text)"/>			
Project No. <input type="text" value="Project number (no.)"/>	Project Name <input type="text" value="Project name (name)"/>	Project ID <input type="text" value="Project ID (no.)"/>	
In Archive open for: <input type="text" value="Distribution (text)"/>			

Decision Fora	Date	Project manager Request	SG Decision

Portfolio Reports



Antura Project configuration (the journey)

Understand your needs & not only replicating solutions



- Need for Pre project Resource and portfolio planning
- Antura Projects: Predefined number of decision points –
 - One project one model: not possible to change
- Configuration consequences
 - Product portfolio management (PPM) and Project management merged into one project model

Project model - Product Development New



Antura Project configuration (the journey)

- Need for multi-project steering groups, SGM specific governance
- Antura Projects: Utilizing possibilities with Project model & project type and Groups
- Configuration consequences
 - Project model: Area of project (PDP, KDP....)
 - Project type: Governance area (SGM)
 - Group: Governance area attester (full permissions on given portfolio)

Decision making party	PT
1. PDP SG Rotating Indexable Gate decision Attestor	1
2. PDP SG Solid Round Tools Gate decision Attestor	1
3. PDP SG Tooling systems Gate decision Attestor	1
4. PDP SG Turninn Gate decision Attestor	1

Add decision making party

Antura Project configuration (the journey)

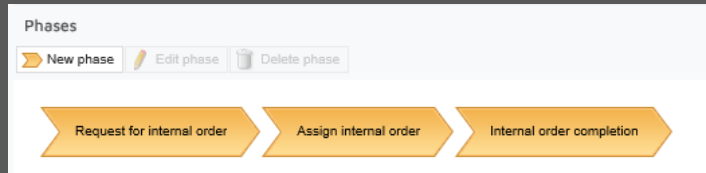


Activate projects in our financial (SAP) and time reporting (Projus) systems

- Antura projects:
 - Internal order number connects Antura projects with SAP and Projus.
 - Change/update of project properties requires project edit authority.
 - Finance not given “general” edit authority in projects

Configuration consequences

- Issue Workflow process using properties to communicate necessary information.



Requested to Antura: Automatic population of properties

Antura Project configuration (the journey)



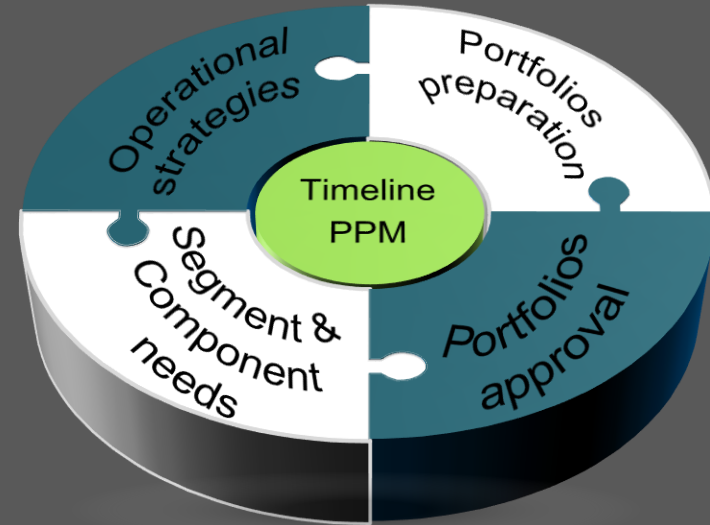
Multi project SGM decision making and communication of decisions to Projects

- Antura Projects:
 - Project status and project requests to SGM communicated through Performance reports.
 - Information needed for SGM decision compiled in SGM specific Dashboards.
- Configuration consequences
 - SGM projects in Antura Projects
 - SGM decisions recorded in SGM minutes
 - Project-related decisions also recorded in project decision document.

Requested to Antura: SGM project approval of non DP related decisions not requiring updating decision document.

Implementation strategy, step by step

- Start with one portfolio – building experience
- Step-wise introduction of functionality
- Internally developed training modules aligned with steering group meeting sequence
- Stakeholder targeted training packages, built on defined training modules



Benefits of using Antura Projects



Realized

- Project portfolio, consolidated from initiative to finished project
- Dashboards, simplified steering group meetings
- Schedules, transparency on project and portfolio level
- Predefined management reporting, aggregated based on project content.

Expected

- Resource management
- Budget & Cost management
- Project portfolio execution planning

Lesson's learned Experiences & difficulties



- Trust experienced advice
- Make use of test environment
- Question existing solutions, both ways
- Be open minded, be prepared to accept new interpretation of established “concepts”
- Think big, act small
- Maintain contact with internal IT throughout the implementation

