Program Manager

The very first screen we encounter after our app is installed and configured properly by our Jira Administrator, is the Program Manager. This is our start screen and from here we will begin our journey with the application.

What is a Program?

A concept of a Program was established for the purpose of creating highly editable and adjustable Project Portfolios and to assure their easy and flexible management. Jira as a project management environment has a clear-cut hierarchy and there’s no doubt about it. Users’ tasks can be aggregated in specific Projects, each with their own Versions and Components. Jira Software also introduces us to the Epic-Story structure and that’s about it. But what if you were to try and implement Program management without changing the whole toolset? Without constant restructuring of Jira Projects?

BigGantt and BigPicture Programs form the most basic layer of our app. Each Program can represent a JQL (Jira Query Language) filter, meaning that it can set its scope to (literally) any number of Projects.

There are two basic principles which apply to a concept of a Program:

- There is no limit to how many Programs one can create and maintain in our app. This means that we can use the same data in 10 different Programs at once, and just configure different view settings for each.
- There is no limit to how many given objects (Tasks, Projects, Epics, Subtask, etc.) a Program can uphold. All of these objects are synchronized between each other, so we can use the same tasks in multiple Programs.

A common use case incorporating the above is a setup, in which teams have their own Programs, with a low-level view and Edit permissions. For an instance: Shareholders and Team Leaders may have an access to a separate Program, which pulls in tasks of all Teams. It gives them a higher-level view and view only or edit permissions. A separate admin has access to technical setup of all of the above. Obviously, this is just an example. There are many different ways in which the concept of a Program can come in handy – depending on the Project Management Methodology of one’s choice.

In order to access the Program Manager, please expand the ‘BigGantt’ / ‘Big Picture’ from Jira Menu Panel located at the very top - on page’s header. There we can find the Program which we are currently working on along with our desired feature. If the application has been just recently installed this list will only show the Program Manager. That’s why we’ve aimed to cover this piece first.

Program Wizard
Once in the Manager, we can see a set of menus, sorting and filtering options. Let’s focus on our Program Wizard for now as display features are covered in the following paragraphs of this documentation.

Program Wizard can be accessed by selecting ‘+ Add New Program’ button on the top left part of the screen just below our Program Icon and Program Name. The wizard is very easy to use and has amazingly intuitive look and feel. It allows users to build their portfolio with few smooth moves and clicks. Once we select it, we will see four interactive action bars which will guide us through a Program creation process:

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<th>PROGRAM WIZARD</th>
<th>Allows user to add new Programs in BigGantt</th>
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<tr>
<td>Create new Program</td>
<td>Allows users to either Create completely new Program from the scratch or one that uses preconfigured setup of other Program.</td>
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Creating a New Program

By selecting this action bar, we can either ‘Create Program from scratch’ or ‘Use configuration of existing Program’. After pressing the ‘Next’ button we will enter the ‘Basic data’ of which the first option will return a menu with fields to populate. These fields are: ‘PROGRAM NAME’, its ‘LEADER’, a period of time in which we presume our projects will be ongoing and of course privacy settings – to either make Program ‘Visible to everyone’ or ‘Visible only to me’ (i.e. visible only to its creator).

‘Scope data’ is the menu that follows and allows us to define subsets of Tasks that we would like to include in the Program we are about to create. As we’ve already mentioned, a user is allowed to import everything from Jira or select Projects, Boards and saved Filters. They can even create an ad-hoc JQL filters with queries the input in the extra filtering field. One is also allowed to skip all this by toggling the ‘Create brand new Jira Project’ feature. After finishing with this part (once we either define our scope or decide to create a new – empty Project) user is moved further - to the ‘Advanced configuration’ to define the ‘Project Key’ (optional – for brand new Projects) and the ‘Scope Context User’.
Every Program is displayed in the context of a user that is currently viewing it. 'Scope Context User' on the other hand is a user in whose context the whole Program operates. That means that all data used in the Program will be pulled to it, based on the scope and range of permissions which that specific user has. We have prepared a broader description with some additional examples in this article. This user (for global projects) is usually a Project Manager/Lead, Scrum Master, Product Owner or Administrator. It is good to assure that the person has a wide range of permissions in order for Jira to correspond properly with our Program.

If in the first menu we decide to 'Use configuration of an existing Program', we will be able to get a list of our portfolios from the drop-down menu and go through the same set of options as in case of 'Create Program from scratch' mechanism, yet with memorized data scope options.

**Step-By-Step Guide**

1. Choose 'Create New Program' from the available options and click on the 'Next' button.
   a. 'Create Program From Scratch'.
   b. 'Use Configuration From An Existing Program' (you will need to select a Mother-Program)
2. 'Basic Data' - enter the required information:
   a. 'PROGRAM NAME'
   b. 'PROGRAM LEADER'
   c. Dates ('Start Date - YYYY/MM/DD' and 'End Date - YYYY/MM/DD')
   d. Privacy Settings ('Visible To Everyone' or 'Visible Only To Me')
3. 'Scope Data' - click on the 'Create Brand New Jira Project' to start from scratch or select the following information to limit the scope of data used:
   a. 'Filter'
   b. 'Project'
   c. 'Extra JQL Filtering Conditions'
4. 'Advanced configuration'
   a. 'Project Key'
   b. 'Scope Context User'
5. Click on 'Let's Get It Started!'

### Cloning an Existing Program

The second bar (option) of the Program Wizard startup screen allows users to 'Clone Existing Program'. What does it mean exactly and how is it different from 'Creating New Program' with the configuration of an existing one? Well, it is - as it not only copies the configuration of its Mother-Program, but also replicates all tasks and relations between them while following the same synchronization and scope definitions.

By selecting the second option, we can choose the desired Mother-Program, press the 'Next' button and also define the 'Basic data' as in the case of a new Program creation. In this menu though, we are also able to decide if we’d rather 'Create new Jira Project' or select an existing one to which tasks and configuration will be applied.

The last option will allow us to pick a Jira Project Key that will define our portfolio.

**Step-By-Step Guide**

1. Choose 'Clone Existing Program' from the available options, then select a source Program - from the list of available Programs and click 'Next' button.
2. 'Basic Data' - enter the required information:
   a. 'PROGRAM NAME'
b. 'PROGRAM LEADER'
c. Dates ('Start Date - YYYY/MM/DD' and 'End Date - YYYY/MM/DD')
d. Choose whether you wish to 'Create New Jira Project' or 'Select Existing Jira Project To Use'

3. Advanced configuration:
   a. Choose a 'Project Key'
   b. Choose a 'Program Leader'

4. Click on 'Let's Get It Started'!

This option will Create a New JIRA Project. And the following settings / data of the source Program will be used along with all issues included in the Program's scope:

- Perspective configuration
- Synchronization configuration
- WBS

As we can see, cloning may seem like a powerful tool (and it is one), though it is incapable of copying (recreating) some Non-Issue Jira entities. Let's think of a case, where we try to clone a Program with one Project, synchronized Versions and Components. They will be displayed on our Gantt's WBS as Versions and Components (naturally if we've decided to Synchronize our WBS and define its Hierarchy in that certain way). Though, what would happen once we've cloned such Program?

In both cases, hierarchy remains the same. Allocation of Tasks on Gantt chart and Gantt's WBS also stays unchanged. Where did Components' and Versions' icons disappear?

This is an effect of cloning such specific configuration. As our app is capable of creating Jira Issues, recreating the structure, it is not capable of creating anything that is not a Jira Issue while cloning, therefore it will automatically replace the original Version or Component with an Artificial Task.

In the second scenario, let us clone a Program synchronized with two Projects in its Scope. As we can see, both Projects are displayed as Tasks (though in Jira they still exists as Projects).
Once we clone the Program when choosing a new Project creation, our app will create a new Project though on Gantt's WBS and the Gantt chart itself, it will replace previous Projects (which were displayed as Tasks) with Artificial Tasks.

Additionally, as in this case our Task Period Configuration fields (in Jira Administration Add-ons, (BIGPICTURE / BIGGANTT) Gantt Configuration) were not mapped to Original Estimate - Due Date, the Time Tracking Progress of our Tasks was reset.

Even though Cloning can be a very powerful functionality, it will not replace Program Creation functionality. As it copies Programs only on their highest layer, it is very useful for the purpose of creating Project Portfolio Templates, which we can later re-use for certain types of Programs.

Importing Data From a File

This option is available only with a valid BigTemplate instance installed in your environment.

This bar will allow us to go through a process of creating a completely new Program and Jira Project based on the settings which we import from either MS Project (MPX / MPP) or MS Excel (XLS / XLSX) files of which 'Sample Projects' can be found below:

SampleExcelProgram.xlsx
SampleMSProjectProgram.mpp
Few very important rules have to be followed once importing files mentioned above and we will try to briefly describe those too.

When importing from MS Project or MS Excel to BigGantt, it's possible to change the representation of imported project in our applications. For now you can choose only from 2 possible Import WBS Strategies: a ‘Structure Based On Tasks’ and a ‘Structure Based On Epics’. Once we pick one of these two options we will be introduced to the Basic data screen as in every previous case, though in here we will see an additional option which allows us to Browse a file from which we would like to import.

Step-By-Step Guide

Importing a file can be done if few quick steps:

1. Choose 'Import Project from a file' from the available options.
2. 'Basic Data' - enter the required information:
   a. ‘PROGRAM NAME’
   b. ‘PROGRAM LEADER’
   c. ‘Browse’ a ‘File To Import’
   d. Privacy Settings (‘Visible To Everyone’ or ‘Visible Only To Me’)
   e. Choose whether you wish to ‘Create New Jira Project’ or ‘Select Existing Jira Project To Use’
3. Click on ‘Let’s Get It Started’

Please bear in mind that the file cannot be over 50 MB.

As we've mentioned, when importing, we can choose to build our Program to have its Structure Based on Tasks or on Epics. The core difference when building structure is that the Parent Task for our imported Tasks will be of an Issue Type which we’ve selected during the import.

Structure Based On Tasks

Structure Based On Epics

Evaluating New Program With Sample Data

This feature allows users to create a new Program with a new project for evaluation, training and practice purposes. It allows users to play around within BigGantt's Gantt chart and WBS Panel. We highly suggest to create one right after installation of the app, so you can look and touch what you will deal with and master later on!
**Step-By-Step Guide**

1. Choose 'Evaluate With Sample Data' from the available options.
2. Basic data - enter the required information:
   a. 'PROGRAM NAME'
   b. 'PROGRAM LEADER'
   c. Dates ('Start Date - YYYY/MM/DD' and 'End Date - YYYY/MM/DD')
   d. Privacy Settings ('Visible To Everyone' or 'Visible Only To Me')
   e. Choose whether you wish to 'Create New Jira Project' or 'Select Existing Jira Project To Use'
3. Click on 'Let’s Get It Started'

This pretty much covers all options we can go through in the Program Wizard. Beside the wizard itself though, we have a selection of other features to get a better insight into our Programs.

**Display Features**

![Program Manager Panel](image)

**Sorting**

This Panel / Tab allows users to sort Programs by this: Names, Leaders and Start Dates filled in the Basic data field during Program Creation process.

**Views: Tiles, List, Gantt, Timeline**

Our Program Manager also introduces many different views which allow users different display options of their Programs. Each one of them holds a different amount of details and various range of information. Gantt and Timeline for example display a selection of our Programs in form of a Gantt chart! Thanks to this feature we gain a global view over all our projects and portfolios.

**Filtering**

Filtering feature allows us to display Programs created by ourselves, our Favourites and by the status which they are currently in. A very useful mechanism especially when our portfolio is massively packed with Programs.

**Filtering By Date**

Pretty much self-explanatory. With the addition of previous functionality allows us to narrow down our display even more.

**Search-bar**

A form of an ad-hoc filtering features. Allows users to search for Programs by the Program Name.

**Fullscreen Mode**

When we feel like the Jira and Program Panel are obsolete.

**Program Status**

Last, but not lest it is important to mention a Status to which our Program in the Program Manager can be set:
NEW - when Program wasn't started yet and there should be no progress on it whatsoever.

STARTED - which marks Programs which we are currently working with and there is an ongoing progress.

CLOSED - Program which we've finished working with and the progress hits 100%.

We need to keep in mind that these statuses are just a visual representation of our portfolio and do not affect Tasks, Projects or any other components in their scopes in any way. This means that we can move Programs between their statuses in a way we feel is the most convenient and suits our current project needs the most, despite of their actual progression. We can do that by dragging and dropping Program Tiles around or by clicking on the 'Cog Icon' on that Tile and selecting a Status which we want to apply.

Besides statuses mentioned above, there's one additional which we can apply to our Program by marking it as our Favourite. We can do so by clicking the 'Star Icon' located in the top right corner of our Program Tile. Marking a Program as Favourite can be applied additionally to any of three statuses which we've selected before.