

HERMES

Issue 2022

USER-DEFINED SCENARIOS – SIZING AND TAILORING

KEY INFORMATION IN BRIEF



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Hermes[®]

In HERMES, user-defined scenarios are created using the 'Sizing' and 'Tailoring' functions. To skip the Sizing function and go straight to Tailoring, click [\(3\) Go to Tailoring](#).

A Sizing

Create a user-defined scenario in 3 steps

Use the tab for [traditional](#) or [agile](#) projects to switch between the two.

There are 3 steps involved in reducing the project results to be created based on the determined project value (Sizing)¹:

(1) Load scenario

Choose a suitable scenario for your project from the list. Decide whether the scenario should be loaded with the initiation phase ([scenarios featuring all phases](#)) or without this phase ([scenarios without initiation](#)).²

(2) Determine project value

Based on your answers to eight questions, the value of your project will be determined by an algorithm. There are three categories: small, medium and large. **LARGE** corresponds to the full version in accordance with the HERMES reference manual. **MEDIUM** is a reduced set consisting of tasks that contain the minimum required documents. **SMALL** is the most streamlined version and is optimised for simpler projects. The HERMES governance is observed in full for all versions.

Provide your answers to the questions **in relation to other projects in your organisation**. For example, while one project may represent a major undertaking for one organisation, the same project could represent a small undertaking for another organisation. If you are unsure about any of the criteria, check the project guide or seek information from the project management office or project competence centre of the relevant organisation.

(3) Go to Tailoring

Click [\(3\) Go to Tailoring](#) to

- a) **download** the following artefacts for your customised project: overviews of [PDF traditional](#) or [PDF agile](#), [templates](#) and [execution structure plan](#)

Observance of the HERMES governance is guaranteed in full thanks to 'automatic changes' in the Sizing function.

- b) further customise your customised project using the **Tailoring** function.

Observance of the HERMES governance can no longer be guaranteed due to manual changes made using the Tailoring function

Pause Sizing/Tailoring

You can save a project that has already been customised so that it can be forwarded or **used or edited at a later date**. To do so, download the project changes in their latest iteration via [Download Session](#) and save the JSON file that is generated. This file can, as required, be uploaded again at any time via [Upload Session](#). This will load your changes as they were last saved.

Load new scenario

¹ **For advanced users:** Another option is to manually select the module size for each module without having first selected a scenario or answering the questions that are used to determine the project value. When you open the Sizing function, you will see a list of all modules in the LARGE category. Change the category as required for each module to **M** or **S**. You can also change the module size for each module as required. For example, the project value SMALL deactivates the entire Organisation module, as this module is generally not relevant for this project size in most cases. You can add this module again by clicking on the **M** icon.


² If you only wish to complete the initiation phase for the time being, select 'Initiation only'.

You can use the [Load scenario](#) function to load a new scenario for Tailoring or Sizing.






Note: This will overwrite the current scenario and any Sizing commands that have already been performed. You can use the [Reset](#) function to return to the original scenario (no changes, all modules are shown). Here, too, the current scenario will be overwritten.

B Tailoring

HERMES governance

If you have previously used the Sizing function, the outcomes omitted due to the use of Sizing are greyed out. The HERMES governance allows entire modules to be omitted. This means you can hide entire modules as required  without violating the terms of the HERMES governance. If you do opt to hide or delete outcomes or entire tasks, it is no longer possible to guarantee that you are in compliance with the HERMES governance. **This is why changes of this kind are only recommended to be performed by advanced users** who are fully aware of the consequences that may arise.

Hide or delete elements

Click the icon  next to the element (outcome, task, module) that you wish to hide or delete. The relevant element is greyed out and the icons   are shown. You can use the icon  to undo the operation (the element is shown again). You can use the paper bin icon  to delete the element **permanently** from the scenario.

When **downloading the artefacts** overviews [PDF traditional](#) or [PDF agile](#), [templates](#) and [execution structure plans](#), it makes no difference if the task/outcome is only hidden or deleted. The difference only becomes relevant when allocating tasks to newly created modules or allocating outcomes to newly created tasks (deleted elements can no longer be allocated).

If you wish to hide or delete an element that is included in multiple phases or modules, this element will be hidden or deleted from all phases and modules.

Edit elements

To edit elements (modules, tasks, outcomes), click **Name of element**. You can change the name or delete the element (for tasks and outcomes). When you change the name of an element, the name of this element will change in every module. If you do not wish to change it, create a separate element with a different name.


For tasks, you can also specify whether this task is a decision task. This is then displayed as a graphic in the scenario overview.

Tasks and outcomes are allocated using the **module settings**. Click on the name of the module to be edited. The responsible role is listed after the task and the allocated phase(s) is listed after the outcome. By clicking on the tasks, you can change the person responsible and remove the allocation of the task to the module (only recommended for advanced users).

In addition, another outcome can be added to the task. If you remove the task allocation, the outcomes allocated to the task will also be removed. By clicking on the outcome, you can change the allocated phase(s) and remove the assignment of the outcome to the task (only recommended for advanced users).

Create new elements

To create a new element (module, task, outcome, role), click on the corresponding **function** [New module](#), [New task](#), [New outcome](#) and [New role](#). Give the element a name. For tasks, you can also determine whether it is a decision task.

Newly created modules appear directly in the scenario overview as the last line entry. You can use the 'Move' function  to move the newly created module to the desired position. By clicking on the module name, you can allocate tasks and outcomes to the module.

Back to Sizing

If you wish to discard all changes and start with Sizing from the beginning again, click [Reset](#) and then in the menu: > [Apply](#) > [User-defined scenarios](#).

