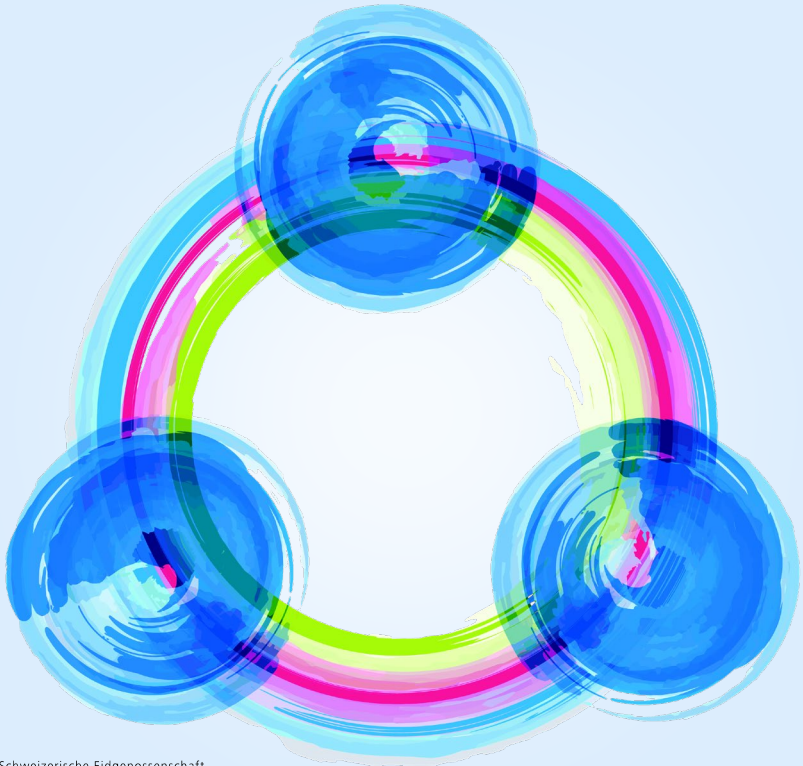


# HERMES 5.1

Project management method for all projects

## Method overview



Schweizerische Eidgenossenschaft  
Confédération suisse  
Confederazione Svizzera  
Confederaziun svizra

Eidgenössisches Finanzdepartement EFD  
**Informatiksteuerungsorgan des Bundes ISB**

# HERMES AT A GLANCE:



## Method

- This reference manual documents the method and is both printed and available online
- It forms the reference basis for certification
- It is used in training and is also suitable for self-study



## HERMES online

- Scenarios form the basis for project planning
- Document templates and the checklist allow for swift application
- Individual scenarios cover the organization's special features



## Training and certification

- Courses help with becoming familiar with HERMES and being able to use it
- Subject-specific advanced courses support professionalization
- Certificates from an independent body attest to skills



## Exchange of experiences

- Events encourage exchange and networking
- Newsletters and social media provide information on the latest news
- HERMES users' experience and wishes are incorporated into further development



## Standardization

- New developments are standardized by eCH
- eCH is the standardization body for eGovernment
- Users are represented in the HERMES group of experts

# Foreword – HERMES Method Officer

## About the method overview

This newly revised edition of the reference manual for project management with HERMES has been developed and continuously improved with the help of countless valuable feedback messages from users. It was important to us to document various topics even more precisely and to include new aspects, but without changing the now widely used method.

Projects in all conceivable disciplines can be implemented with HERMES. The manifold applications of HERMES result again and again in new user needs. We pursue this concern and developments in the area of project management with great interest and incorporate them into the further development of our method so that our users can always receive up-to-date and professional support.

I hope that our revised method will serve you well. Feedback and experience reports are always welcome.

This method overview will give you an initial idea of the advantages of the HERMES procedure and its implications.

**André Bürki**

HERMES Method Officer,  
Federal IT Steering Unit FITSU

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# Imprint

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## Note on gender equality in language

To make it more readable and comprehensible, this manual refers to roles and people in forms which are independent of a person's gender and positions in an organization. These formulations explicitly include women in their respective function.

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# A HERMES overview

## A.1 Definition of the HERMES method

HERMES is the project management method for projects in the area of IT, service and product development, and business organization adjustment. HERMES supports the steering, management and execution of projects with various levels of complexity and different features. As a method, HERMES has a clear, easy-to-understand structure, has a modular design and can be expanded. The main method components and how they interact are described below.

## A.2 Scenarios

Various projects are carried out within an organization. Projects can vary considerably in terms of content and complexity. HERMES provides scenarios to satisfy the diversity of projects.

A scenario is oriented towards the implementation of projects of a specific nature. The scenario contains precisely those HERMES method components that are important for the project. Consequently, HERMES is quick and easy to use. Figure 1 shows a sample portfolio with the appropriate scenarios for the projects.

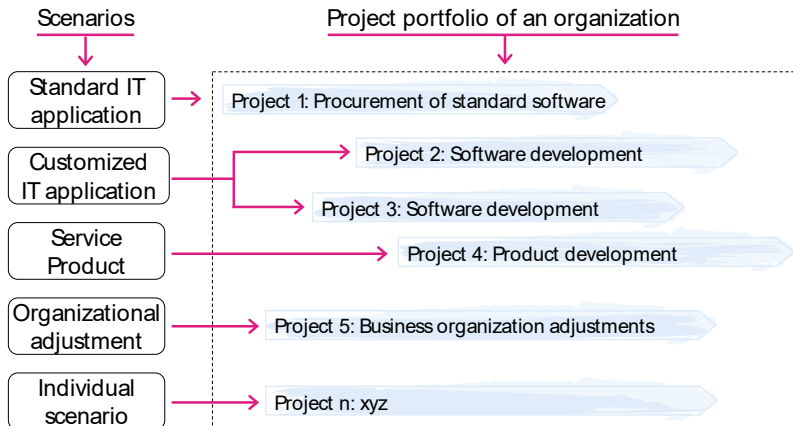


Figure 1: Scenarios and project portfolio of an organization

The project manager selects the appropriate scenario for his project. He plans the project on that basis. HERMES offers a range of standard scenarios, e.g. for the procurement and integration of a standard IT application, the development of IT infrastructure and the development of a service/product.

HERMES users can adapt standard scenarios to the needs of their organization and create further, individual scenarios. Individual scenarios can be officially made available to other HERMES users by being proposed to the eCH association for validation.

### A.3 Phases and milestones

The phase model forms the backbone of the project, irrespective of the scenario. It creates the conditions for the project participants' common understanding of the course of the project. This is an important prerequisite for the successful cross-organizational handling of projects.

Projects are carried out in four phases according to a uniform phase model. The project starts with the initiation phase with the project initiation order milestone and ends with the end of the deployment phase with the project closure milestone. The phases start and finish with milestones. Tasks that lead to a decision also end with a milestone. Depending on the scenario, there are various milestones. Figure 2 shows the phases of a possible project with some milestones.

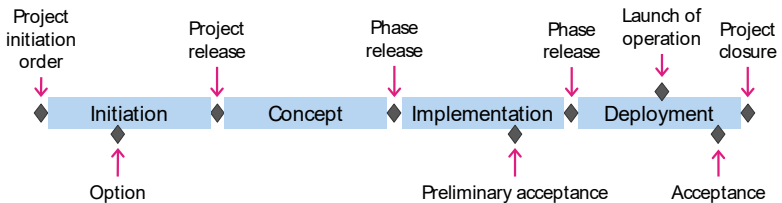


Figure 2: Project implementation in phases and with the help of milestones

Milestones correspond to quality gates when the outcomes and the procedure are decided. This also involves coordination with the strategic objectives and specifications of the core organization.

Reporting is carried out periodically throughout the phases in accordance with the specifications of the core organization.

### A.4 Modules

Modules are reusable building blocks for creating scenarios. A module contains the thematically related tasks, outcomes and roles (see Figure 3). They are assigned to phases and milestones.

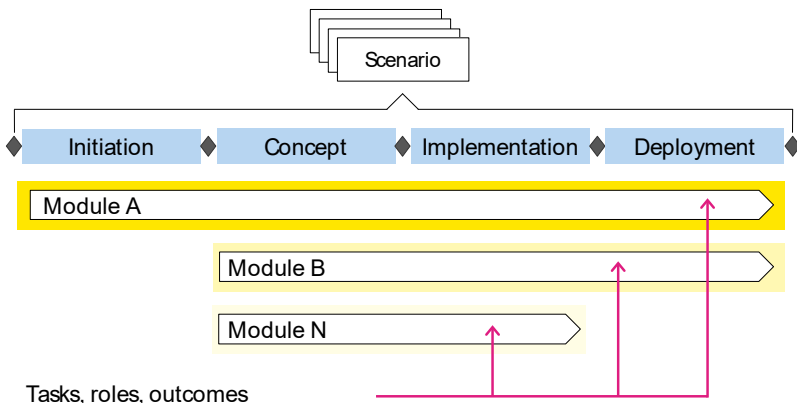


Figure 3: Tasks, roles and outcomes of a module

For example, HERMES groups the project steering tasks and outcomes in the project steering module. This makes it easy for project sponsors to see the tasks and outcomes for which they are responsible.

HERMES users can create additional modules that they can integrate into their individual scenarios.

## A.5 Roles

HERMES distinguishes between core organization roles and project organization roles, and defines how they are related. There is a role description for each project organization role. It defines the responsibility, powers and required skills for the role. Each project organization role is assigned to one of the hierarchy levels of steering, management or execution.

Partners in the project organization are users, creators and operators. Each role is assigned to one or more partners. Figure 4 shows the minimum project organization with the roles of project sponsor, project manager and specialist. Many other roles that can be used as required are defined in HERMES.

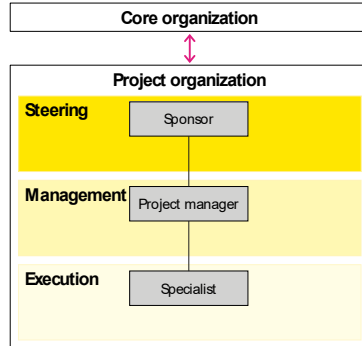


Figure 4: Relationship between the core and project organization

## A.6 Tasks

Tasks are used to develop outcomes.

There is a task description for each task. It defines the general approach and the activities that are undertaken to produce the outcomes. Each task is assigned a responsible role. Thematically related tasks are grouped into modules and assigned to phases (see Figure 5).

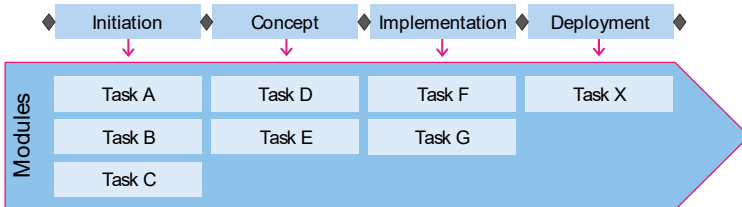


Figure 5: Tasks are grouped into modules and assigned to phases

## A.7 Outcomes

As shown in Figure 6, outcomes are at the heart of HERMES.

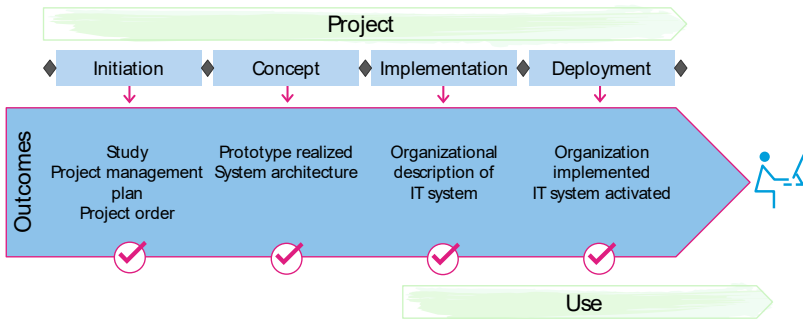


Figure 6: Outcomes are at the heart of HERMES

For each outcome, there is a description of the outcome. For many outcomes, there are document templates that describe the content in the outcomes in more detail. Roles are assigned to each outcome. These give an indication of the involvement in the production of outcomes. Minimum outcomes are defined to meet project governance requirements. Thematically related outcomes are grouped into modules and assigned to tasks and phases.

## A.8 User information

The user information describes specific aspects of HERMES. It forms the basis for a deeper understanding of methods, for example with regard to governance and sustainability. It also shows how HERMES should be used in specific situations and helps to reduce the scope for interpretation, for example in agile development or the application of HERMES in programs.

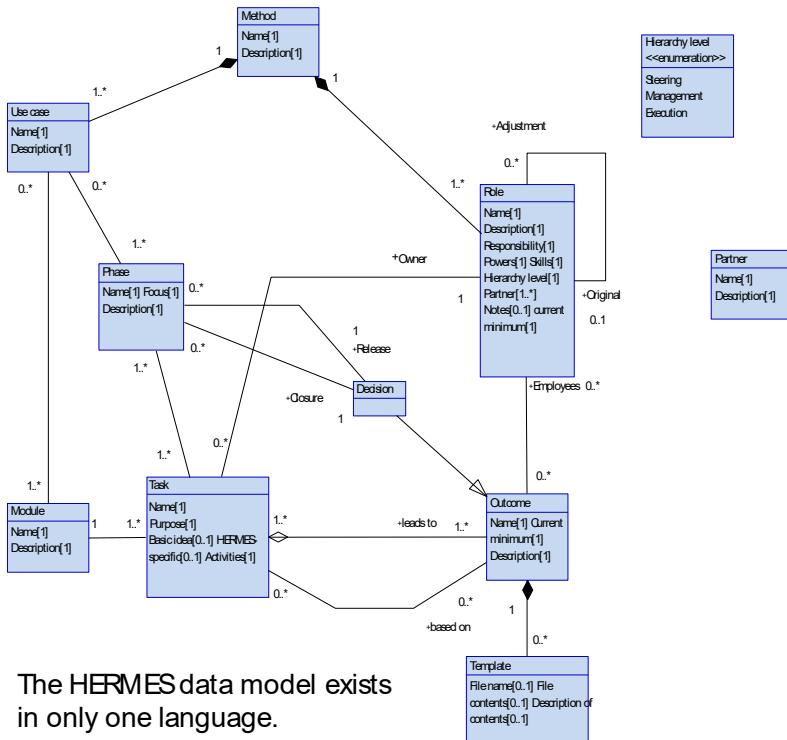


## B HERMES data model

The HERMES data model is a conceptual data model that describes the data and information from a methodology viewpoint and formulates its structure. It was developed on the basis of the current HERMES project and program management using INTERLIS, a conceptual data description language of the Confederation.

HERMES coherence, i.e. the uniform structure of the data in a method component, is determined with this data model (e.g. each task is assigned to just one module). Implementing the HERMES data model means being able to save, display and generate data with the appropriate level of detail.

Figure 7 shows the UML diagram of the HERMES data model.



The HERMES data model exists in only one language.

Figure 7: UML diagram of the HERMES data model

With the help of the HERMES data model and the description language INTERLIS, the desired further development of new method components is to be promoted, as is the expansion of existing method components, e.g. this project management.

# C Project perspectives

## C.1 Overview of the perspectives

Due to the clear structure of HERMES with roles, tasks and outcomes, various project perspectives can be taken (see Figure 8).

- Timing perspective
- Partner perspective
- Hierarchy perspective

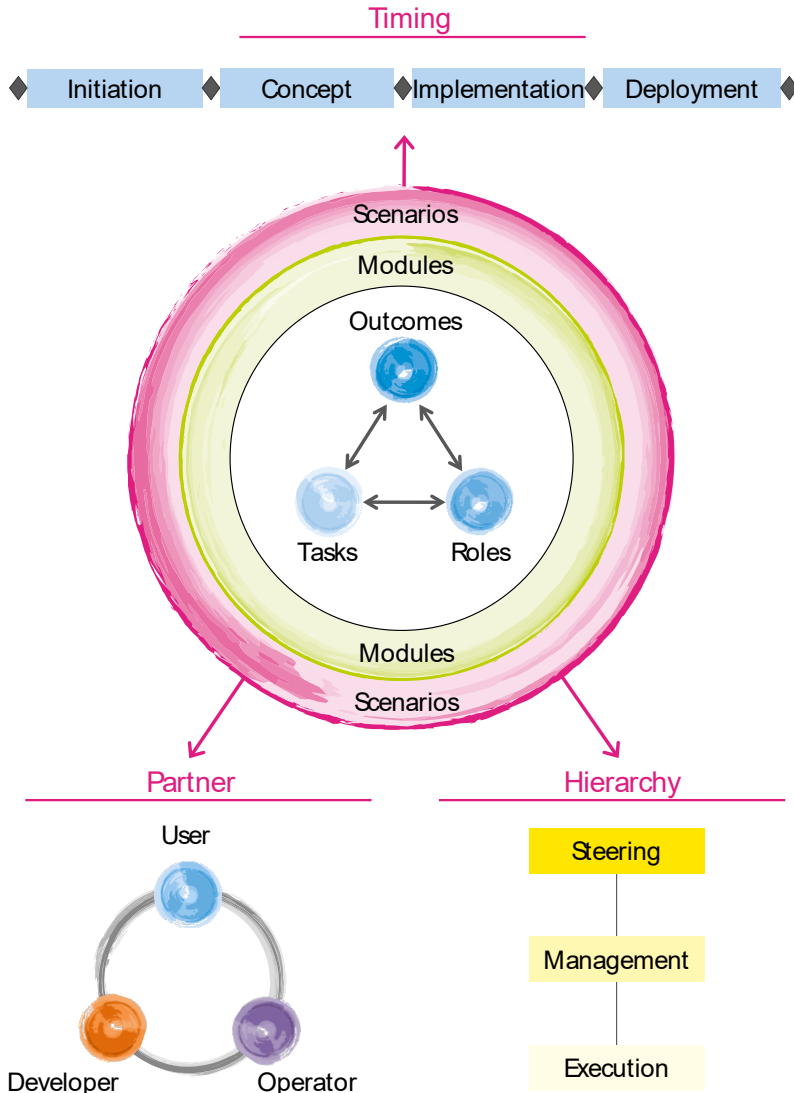


Figure 8: Project perspectives

## C.2 Timing perspective

The phase model subdivides the life cycle of the project and creates the conditions for the project participants' common understanding of the course of the project.

The timing perspective shows

- which tasks and outcomes are processed in which phase;
- which milestones lie in which phase and which decisions are made in the process.

## C.3 Partner perspective

A role is assigned to one or more project partners (user, creator or operator). The role holder represents the view of his organization in the project.

Based on the assignment of roles to a partner, each partner sees

- which roles he typically has to occupy in the project;
- the tasks for which he is responsible;
- the outcomes on which he collaborates.

## C.4 Hierarchy perspective

The hierarchy levels regulate responsibility in a project. They support governance compliance.

The hierarchy perspective shows

- which decision-making tasks are located at which hierarchy level;
- which outcomes occur at which hierarchy level;
- to which hierarchy level the roles are assigned.

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# The project management method for information technology, services, products and business organization.

## **HERMES can be applied immediately and offers**

- Scenarios for concrete project processes
- Web tool to support the method
- Document templates, including a checklist, for efficient project management

## **HERMES is simple and understandable and provides**

- Clear task descriptions with activities
- Concrete role descriptions for cross-organizational cooperation
- Document templates for quick results

## **HERMES supports**

- The project sponsor with regard to governance and sustainability
- The project and program manager with planning, checking and management
- Specialists with project execution
- Management with the higher-level strategic steering of projects and programs

HERMES is recommended for all types of programs and projects.

HERMES covers all dimensions of modern program and project management, such as procurement and supplier management, communication and stakeholder management, risk and quality management, change management, agile development, governance and sustainability. Moreover, program/project-specific procedures are described.

HERMES is the standard for all types of projects of the Federal Administration and many cantons, communes and companies. HERMES is also the eCH standard for e-government projects and programs.

Both project and program management are dealt with in separate reference manuals.