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# **Quick Start Guide**

**Application Lifecycle Management  
with CollabNet Enterprise Edition 4.5**

**COLLABNET®**

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## Application Lifecycle Management

Application Lifecycle Management (ALM) consists of content, artifacts, and tools that guide project members through a development process. CollabNet Enterprise Edition 4.5 supports ALM through project templates customized for your organization's business and technical development processes. It can support the CollabNet Baseline Process or other standard processes, such as waterfall, iterative, or agile development, as well as initiatives such as CMMI.

Defining and following a development process has several benefits:

- It provides a framework for managing software development projects.
- It establishes guidelines and a methodology for performing various project tasks.
- It provides a consistent and repeatable way of working.
- It sets up clear milestones and methods to achieve them.
- It improves overall efficiency, productivity, and communication.

CollabNet provides configurable content that you can use to support a process-driven environment for your project members. These interactive project pages can provide information for everyone working on a project: product managers, engineers, testers, and support people. You can configure any of these project templates to suit the ALM practices of your organization.

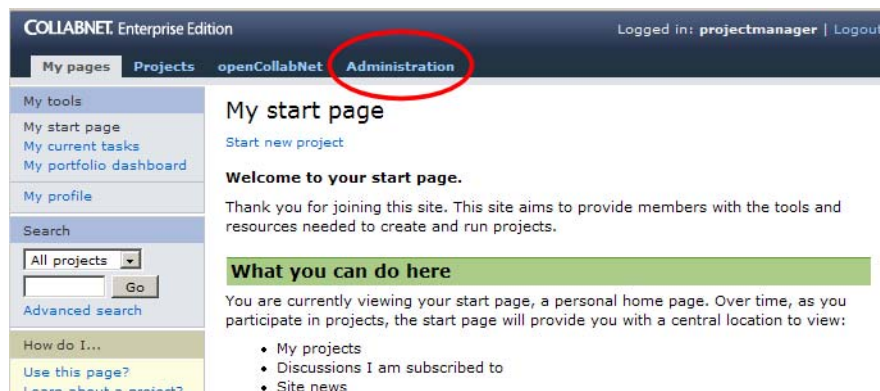
### Evaluating project templates

You can use CollabNet project templates to set up project sites whether or not your organization currently uses an application lifecycle process. The default project templates are the easiest way to get started. You can use a project template in different ways according to your needs:

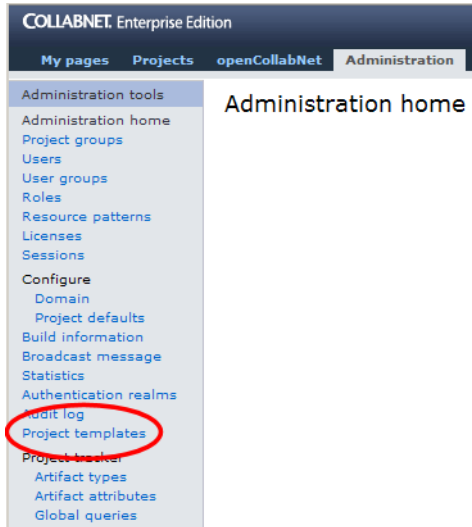
- Adopt the template as is.
- Configure the template to fit your existing process.
- Set up different processes for different projects.

The first thing to do is take a look at the project templates that are available. For example, to preview the CollabNet baseline project template, follow these steps:

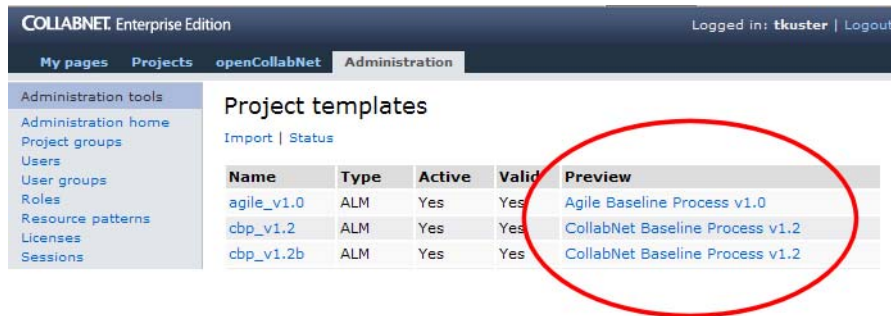
1. On your site's **My pages** or **Projects** page, click the Administration tab.



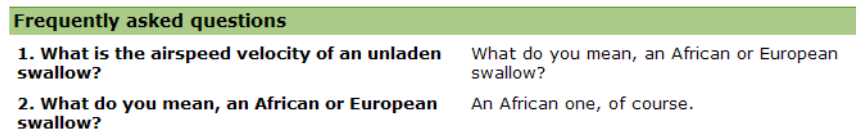
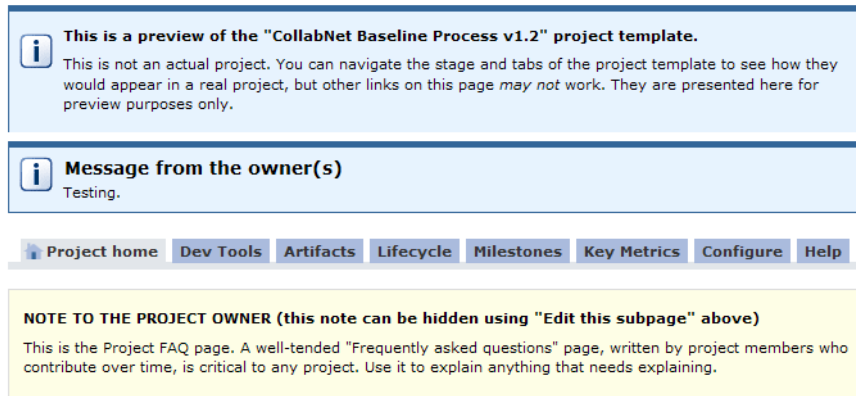
2. Click **Project templates**.



3. Select a project template to preview.



4. Look around.



You can use this display to get a feel for what's possible with a project template. Click each page and consider how you would use it or modify it to suit your project's needs.

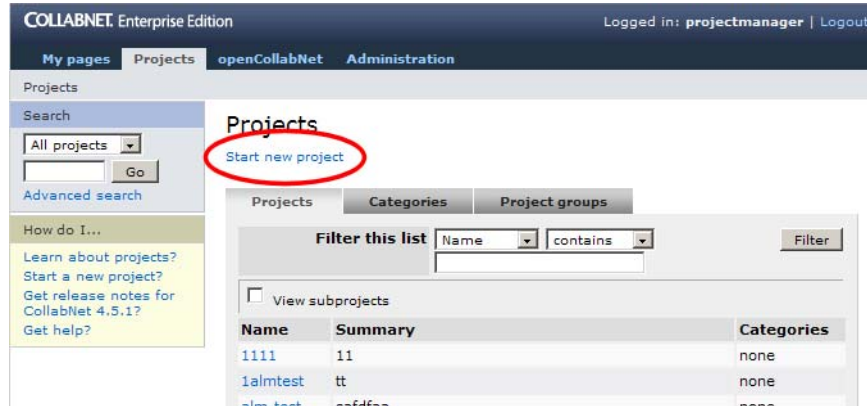


## Creating a project from a project template

Templates provided by CollabNet or by your domain administrator can make it easier to create a project site that fits your needs.

To use a template to create a project, follow these steps:

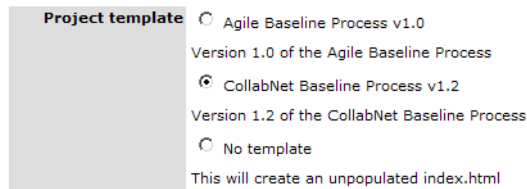
1. From your “My start page” or the list of all projects, click “Start new project.”



2. Enter a name and a summary for the project.



3. Select the template you want to use.



4. Select **Subversion** as the versioning component and **Project Tracker** as the tracking component.

Versioning component	Subversion
Which versioning component to use for the project. The choices are CVS (Concurrent Versions System) and Subversion.	
Tracking component	Project Tracker
Which tracking component to use for the project. The choices are Issue Tracker (based on Issuezilla) and Project Tracker (based on Scarab). See online help for more details.	

5. Click **Create project** to save your changes.

Artifact code	SC
1-4 character prefix for artifact and A-Z; no numbers, spaces unique. Top level projects can artifact code as their parent pr (Project Tracker only)	
Project owner	root
This field automatically default: identify them as the project ow	
<b>Create project</b>	

6. Click the link to access the project home page.

myproject  
**Project created**  
Congratulations, you just started a new project!  
You should now go to your new [myproject project home page](#) to start customizing your project content.

**Note:** It may take a moment for the toolbar to appear.

## Modifying your project

Regardless of how closely the project template matches your ideal process, you will need to make some modifications. You can use the CollabNet editing tools to modify your project home page. You can add more pages and change them whenever you need to.

You will want to devise a hierarchy of project pages to organized your information and make it easily available to project members. Choose from these types of pages:

- **Page:** The top-level information container. Pages usually appear as tabs across the top of your project home page.
- **Subpage:** A component of a page. A subpage usually appears as a lower tab when a page is selected.
- **Freeform page:** A page for background information. You link to a freeform page to make it available to users.

From anywhere in the project, click **Edit this page** to create and edit pages. When you have organized the activities in your project under these pages, you can add subpages or freeform pages to contain more detailed information. You can then add components to these subpages or freeform pages.

**Note:** You don't have to use the visual project page editor to modify your project. For information about editing the required files manually and managing them with Subversion, see the online Help for your project.

## Adding a page

To add a page to your project, follow these steps:

1. On the project home page, click **Edit project pages**.

The screenshot shows the CollabNet Enterprise Edition interface. At the top, it says "COLLABNET Enterprise Edition" and "Logged in: projectmanager | Logout". Below this is a navigation bar with "My pages" and "Projects" tabs. Under "Projects", there are links for "openCollabNet" and "Administration". The main content area is titled "myproject" and "Project home". A red circle highlights the "Edit project pages" link in the navigation bar. Below this, there is a "Message from the owner(s)" section with the text "This is my test project." and a "[ Edit ]" link. At the bottom, there is a "Summary" section with fields for "My Project", "Category: svncat", and "Owner(s): root", each with a "[ Edit ]" link. A welcome message at the bottom says "Welcome to this awesome new project. You can use these project pages to keep track of your work, increase your productivity and have more fun. Let's get to it!" with a "[ Edit ]" link.

**Note:** In this example we are using the CollabNet baseline project template. The procedure works the same way with any of the available templates.

2. On the **Edit project pages** page, click **Add new page**.

myproject  
Edit project pages

**Information**

\* = Required fields

Location Project pages

\* Project pages title

The name will be used as the navigation link for this page, and as the browser title.

**Additional pages**

[Add new page](#)

Sequence	Name	Availability	Actions
	Project home	All users	<a href="#">View</a>   <a href="#">Edit</a>

3. Enter a name for the page and a description that suits the activities you will manage with this page.

myproject  
Add new page

**Information**

\* = Required fields

Location [Project pages](#) > New page

\* Name

The name will be used as the navigation link for this page, and as the browser title.

Description

\* Availability

4. Click **Save** to see the new page as a tab on your home page.

## Adding a subpage

A subpage is a page that works as a child of another page. A subpage usually appears as a lower tab when a page is selected.

To add a subpage, follow these steps:

1. Select the page to which you want to add a subpage.

COLLABNET Enterprise Edition Logged in: projectmanager | Logout

My pages | **Projects** | openCollabNet | Administration

Projects > myproject

Project pages

Project home

Stages

- Definition
- Design
- Code & Build
- Testing
- Deployment
- Support

Project Management

Communications

myproject  
**Personnel**

Edit project pages | [Edit this page](#)

**Message from the owner(s)**  
This is my test project.

[Project home](#) | [Stages](#) | [Project Management](#) | [Communications](#) | [Metrics and Reporting](#) | [Integrations](#) | **Personnel**

2. Click **Edit this page**.

3. Click **Add new subpage**.

myproject  
 Edit page  
[View page](#)

**Information**

\* = Required fields

**Location** Project pages > Personnel

**\* Name** Personnel  
 The name will be used as the navigation link for this page, and as the browser title.

**Description** Names and faces of our awesome project members

**\* Availability** All users

**Content**

[Add component to page](#)

*There are no components yet*

**Subpages and Freeform pages**

[Add new subpage](#) [Add new freeform page](#)

*There are no subpages or freeform pages yet*

Save Cancel

4. Enter a name and description and click **Save**.

### Adding a freeform page

A freeform page works like a subpage, but it doesn't automatically show up as a tab. To make it available to users, you can provide links to it with the link tool.

To add a freeform page, follow these steps:

1. Select the page to which your freeform page will belong.
2. Click **Edit this page**.
3. Click **Add new freeform page**.

myproject  
 Edit page  
[View page](#)

**Information**

\* = Required fields

**Location** Project pages > Personnel

**\* Name** Personnel  
 The name will be used as the navigation link for this page, and as the browser title.

**Description** Names and faces of our awesome project members

**\* Availability** All users

**Content**

[Add component to page](#)

*There are no components yet*

**Subpages and Freeform pages**

[Add new subpage](#) | [Add new freeform page](#)

*There are no subpages or freeform pages yet*

Save Cancel



## Adding a component

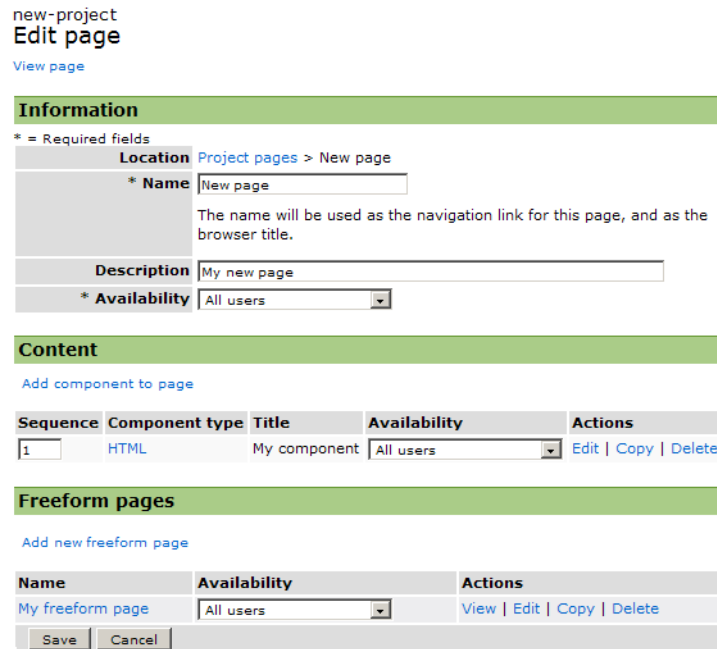
A component is a section of a page where you can share information, such as a task list or a table. You can also use a component to provide a service for project members, such as uploading files.

To add a page component, follow these steps:

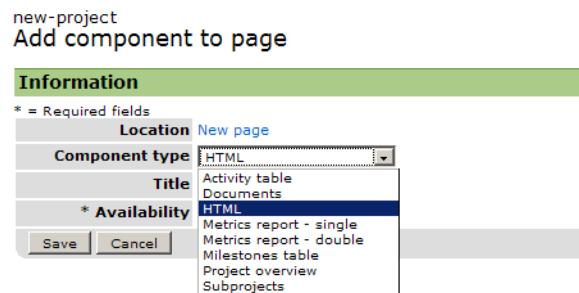
1. Select a page and click **Edit this page**.



2. Click **Add component to page**.



3. In the **Component type** box, select the kind of component you want to add.



Choose from these options:

- **Activity table:** A central place from which users can view work materials such as defects and action items. This component includes a WYSIWYG text editor that enables you to create Web-accessible text without coding.
  - **Documents:** A tool for uploading files to the project site from a user's local computer. Files you upload are automatically listed on the project page.  
**Note:** You can add only one **Documents** component to any page.
  - **HTML:** A space for sharing information of any kind. This component includes the WYSIWYG text editor.
  - **Metrics report:** A graphical representation of project-related events, such as defect counts or closed action items. Useful for spotting trends.
  - **Milestones table:** A list of important project achievements, taken from your Project Dashboard installation.  
**Note:** You can add only one **Milestones** component to any page.
  - **Project overview:** A table displaying the essential top-level information about your project.
  - **Subprojects:** A list of projects for which this project has been designated as the parent.
4. Enter a title for the component and click **Save**.

## Putting your project to work

A project created with an ALM project template helps you track several kinds of information using a variety of configurable work items, such as requirements, action items, or defects.

### Assigning a work item to a page

It may make sense to track a particular work item on a specific page. For example, in a CollabNet Baseline Process project, an action item about developing a software feature might be expected on a page dedicated to the Code & Build stage of your project.

To assign an action item to a page, set the **Action Item Type** attribute.

The screenshot shows the CollabNet Enterprise Edition interface. The main content area is titled "myproject Project Tracker: Enter new Action Item". The form includes several sections:

- Submission Information**: A section with a "Next" button.
- Summary(Duplicate 1)**: A section with a text area containing "My awesome action item".
- Source**: A dropdown menu set to "[source 1]".
- Source Identifier**: A text input field.
- Priority**: A dropdown menu set to "P1 (must have)".
- Action Item Type**: A dropdown menu set to "Coding/Building". This field is circled in red.
- Requirement ID**: A text input field.

The left sidebar contains a navigation menu with categories like "Stages", "Project Management", "Integrations", "Project tools", and "Project Tracker". The "Project Tracker" section is expanded, showing options like "Enter artifacts", "Query artifacts", and "Generate reports".

## Associating an item with a milestone

You can associate any work item with a project milestone. To associate a work item with a milestone, set the **Target Milestone** attribute.

Planning and Execution	
* = Required fields	
Status	Submitted There are no other states available.
* Target Milestone	[milestone 5]
* Target Milestone Objective	Code + Build By
Work Estimate days (Original)	10
Work Estimate days (Current)	7
Work Seq Number	

For more information about ALM artifacts, see the online Help for your project.

## Changing an item type

You can use Project Tracker to change a work item to another work item type. For example, you can copy an action item into a defect and assign it to the Code & Build phase, so a developer can fix the customer-reported problem.

## More information

Contact us to learn more about CollabNet solutions for distributed collaborative software development.

- Get detailed information and project templates at <http://alm.open.collab.net>.
- Call CollabNet at 1-888-778-9793.
- Email [info@collab.net](mailto:info@collab.net).
- Visit [www.collab.net](http://www.collab.net).