

## **BEST PRACTICES FOR COLLABNET PROJECT DASHBOARD AND COLLABNET TASK MANAGEMENT**

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This document discusses CollabNet Project Dashboard and CollabNet Task Management, offering suggestions to the Project Manager on how to get the most from these tools. Information on planning, reporting, task tracking Project setup, Microsoft Project use, and troubleshooting common problems are covered. The document is presented in a question and answer format.

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## Introduction and Intended Audience

This document discusses CollabNet Project Dashboard and CollabNet Task Management, offering suggestions to the Project Manager on how to get the most from these tools. Information on planning, reporting, task tracking Project setup, Microsoft Project use, and troubleshooting common problems are covered. The document is presented in a question and answer format.

Readers of this document should have attended a CollabNet Project Dashboard/CollabNet Task Management training session and have carefully read the associated help documentation. Basics and terminology are not covered in this document.

## How granular should I make the reporting period?

### *Overview*

The reporting period provides a mechanism to dole out, view, group, act, and manage tasks in small increments. The length and start of the Reporting Period is set at the initial Project Plan import. Once set, the Reporting Period cannot be changed.

Projects can run anywhere from a few weeks, to few months, to many years. The reporting period you choose breaks the project up into discrete blocks of time. For example, choosing a reporting period of 1-week on a twelve week project splits the project into twelve parts.

### *Definition of a Short Project*

Short projects typically last from four to six weeks, and have the following characteristics:

- Tasks can complete ahead of time.
- Opportunistically, tasks may be started ahead of schedule.
- Individuals have wide latitude on when to start tasks.
- The individuals are fixed for the duration of the project.

### *Definition of a Long Project*

Project with extended duration run from 8-weeks to many years, and have the following characteristics:

- The project contains major synchronization points.
- Individuals have little latitude on when to start tasks.
- Managers maintain fine grained control on when tasks start.
- The individuals who make up the project may change periodically.

### *Best Practices*

For short projects, choose a single reporting period for the entire duration of the project. This gives the project members the most control over the starting of tasks, while reducing the precision available in reporting.

For long projects, choose weekly or every-other week reporting periods for the project. This will increase the precision in reporting, while limiting project member's ability to start tasks early. Should a project member wish to start a task outside of the current reporting period, the Project Manager will need to adjust and re-import the Project Schedule.

## How do I setup and manage concurrent projects on the same code base?

Many projects are active in CollabNet Enterprise Edition at anytime. One common practice is to create concurrent projects against a single source code repository, where one project is created to hold the code base, and additional projects are created to track platform or release-specific work. In this case, particular individuals may have tasks assigned to them across several projects, and management would like to track each project individually.

### ***Best Practices***

To best support these concurrent projects, first create a project to hold the source code and, optionally, the CollabNet Issue Tracker or CollabNet Project Tracker database. Next, create a project for each concurrent project to be tracked, and add the members to the projects as needed. If preferred, sub-projects can be used. Each concurrent project should also have its own, independent Project Plan.

Project Members can see a consolidated to-do list by viewing the “My Current Activities” page available from the domain’s start page. Managers can view the performance of each Project by visiting the CollabNet Project Dashboard landing pages, and executives can use the “My Portfolio Status” page to view a consolidated roll-up of project status.

## How do I best manage long running projects?

### ***Overview***

Projects exceeding 3-months is the norm in product development shops. Such projects are often hard to manage as resources and tasks are likely to change from time to time.

CollabNet Project Dashboard supports various mechanisms to support such scenario. See below on best practices to effectively manage the project.

### ***Definition of a Long Project***

Project with extended duration run from 8-weeks to many years, and have the following characteristics:

- The project contains major synchronization points.
- Individuals have little latitude on when to start tasks.
- Managers maintain fine grained control on when tasks start.
- The individuals who make up the project may change periodically.

### ***Best Practice***

To best manage a project with an extended duration in CollabNet Project Dashboard and CollabNet Task Management, begin by planning the project in phases. Use Microsoft Project summary tasks to clear delineate the different phases. In addition, embed the name or number of the phase into each task. This will clarify the tasks purpose and its placement in the schedule when the task appears on a user’s to do list. For example, “P1: Database Coding” is more meaningful to a developer than simply “Database Coding.”

Use a moderate length reporting period for task updates. We suggest every other week, but weekly may be preferred.

During the life of the project, available members may change. To change the assignee of a task, export the plan back to your desktop, update the task in Microsoft Project by changing the “Resource,” and re-import the plan. The task will move to the appropriate to-do list, while

maintaining any existing task history. Should schedule dates or work estimates change, the same process can be performed to update those aspects of the plan.

Over the life of the project, use the Historic Variance chart (found on the CollabNet Project Dashboard landing page) to view the accuracy of your planning. In addition, use the other CollabNet Project Dashboard metrics provided to track your projects progress and identify risks early in the project lifecycle.

## **How do I best monitor my project, and identify schedule risks early?**

In any project, tasks can slip. The best defense against overall project slip is to identify these small slips, and quickly act to correct or mitigate those problems.

### ***Best Practice***

To proactively identify projects that have begun to slip, create a project plan with appropriate dependencies in place. Use auto-synchronization for the project, and set a high synchronization frequency, such as once a day. Each day, the overall project variance will be computed and plotted on the Historical Variance chart that is found on the CollabNet Project Dashboard landing page. By keeping a watchful eye on this chart, slips can be detected and acted upon early in the process.

## **How do I opportunistically accelerate task schedules?**

In many projects, Project Managers want to control when tasks is begun. From time to time, they may also want to opportunistically accelerate schedules, and “pull in” a task

### ***Best Practice***

Setup your project with a twice a month or longer reporting period. When the opportunity for task acceleration presents itself, first, download the latest plan from the project. Then, using Microsoft Project, change the start date of the accelerated plan, and optionally re-assign it to the free project member. Finally, re-import the Project Plan. CollabNet Task Management will re-create the appropriate to-do lists, and inform the project member of the new task or tasks available to them.

## **How do I manage a dynamic resource pool?**

Projects often initially assign tasks to roles, rather than individuals, and then utilize a specific person drawn from a list of candidates in the role. This allows specific assignees to be determined later in the project lifecycle, and gives project managers more control over task assignments.

### ***Best Practice***

In this situation, it is best to initially assign tasks to likely resources. Should a new resource be assigned at a later date, change the assignee in Microsoft Project, and re-import the project plan. The task will be moved onto the appropriate to-do list.

## **How granular should the tasks be in the project plan?**

### ***Overview***

Tasks in project plans are deliverables, but deliverables broken down to manageable chunks which can be best monitored. In other words, a task is defined as the smallest level of an individual or team output and not how the task is performed.

While scheduling and tracking tasks at finer intervals facilitates better visibility into project and resource activities, it is also important to keep them aligned with the progress of the project. Shorter duration tasks are generally preferable at the end of the project lifecycle to provide better visibility to major milestone slips before they happen.

## ***Best Practice***

### ***Short Projects***

Detailed scheduling is preferred for short projects that last for 4 to 6 weeks. Scope and task dependencies are typically known in advance in these kinds of projects.

Defining tasks with durations from 4-hours to eighteen hours and gathering actual duration on a weekly basis would provide more accurate visibility into the project status as well as the resource activities.

### ***Long Projects***

A macroscopic schedule that identifies all the major activities and their dependencies in the project is preferred for projects spanning for more than 2-months. As the project gets underway, each entry on the macroscopic schedule is refined into a detailed schedule.

Defining tasks with duration ranging from sixteen hours to forty hours are preferred in these projects. This would also enable the team to actually break down their work using Task Management's 'personal task' feature.

## **How do I track small duration tasks like *review meetings, status meetings, etc.*?**

### ***Overview***

During the execution of a project, significant time is spent in unexpected activities such as meetings, status changes, sudden trips, etc. making it impossible to foresee and schedule all the activities in advance given the fast paced dynamic environment involved.

However, Project Managers can intuitively use CollabNet Task Management in conjunction with MS Project to maintain the history of such activities, involved people and time spent.

## ***Best Practice***

### ***Planned Activities***

Meetings such as design reviews, status reviews, etc. are typically directly related to project deliverables (i.e., rolled up tasks).

Such meeting tasks can be created as a part of each of the deliverables (i.e., rolled up tasks) in the plan and can be assigned to either a project lead or all the engineers involved in the deliverables.

This not only would ensure that the total effort involved in the deliverables is captured, but also serve as a buffer for the deliverables.

## ***Unplanned Activities***

### **Practice 1**

If the objective is to capture the time and effort spent on each of the deliverables in the project, then:

- A summary/rolled up task named 'Meetings' (prefixed with the deliverable item name) can be created as a part of each individual deliverable (i.e., rolled up task) in the plan, to account for such meetings.
- This summary task can be assigned to the user who is responsible for the deliverable.
- Each meeting can then be recorded as a leaf task under this summary task with the appropriate progress and resource assignments; and the plan can be re-imported into CollabNet Project Dashboard/CollabNet Task Management.

### **Practice 2**

If the objective is to capture the overall time/effort spent in the project including activities like meetings, then:

- A separate summary task called 'Meetings' can be created in the project plan.
- This task can be assigned to all the leads in the project.
- Each lead can then create individual 'unexpected tasks' under the 'Meetings' summary task as/when they occur and re-import the plan.
- This would not affect the schedule of any other activities in the plan.

## **Troubleshooting**

### ***I just uploaded an incorrect plan. How do I correct the situation?***

From Tasks administration select remove plan and reset, then import the correct plan.

### ***Why are users not seeing their assigned tasks in the 'to do list'?***

Ensure that the resource names used in the Microsoft Project plan are CollabNet usernames. You may want to use the 'Export user list' feature (found on the task files page) to create a resource pool of CollabNet users for use in your plan.

### ***Why is the status and information shown on My Portfolio Status page different than the status and information shown in my project?***

The information on the project page is updated as soon as new data is available from the users. The information on the My Portfolio Status page is updated at every project synchronization (typically once per day). This can cause skew between the two views. To align the views, run a manual project synchronization, found on the task files page.

## **Read Other CollabNet Application Notes**

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