Managing a TeamForge project

Create a TeamForge project

Create a new project when you have identified work to be done that has its own distinct character, dependencies or schedule.

What constitutes a project depends on your organization. Some organizations favor a small number of big, centralized projects. Others prefer a larger number of smaller, specialized projects. Your site administrator can help you decide if your work should be part of a larger project or a project of its own.

1. On your TeamForge site's main page, click the **Projects** dropdown list and select **Create New Project**.
2. On the *Create Project* page, give the project a name and a brief description.
   - The name will appear in project lists and on the project's home page.
   - A terse description is recommended. There will be unlimited room to discuss the project's aims and methods in detail on the project pages themselves.
3. Provide a URL name for the project, if you want the URL for the project to be different from the internal project name. If you do not enter a URL name, the project URL will be the same as the project name.
4. If your site administrator has provided project templates, select the appropriate one for your new project. Project templates give you ready-made artifact types, workflow support, user roles and other start-up content appropriate to the kind of project you are creating.
5. Click **Create**.

The project is submitted to the CollabNet TeamForge site administrator for approval. You will receive an email notification when the site administrator approves or rejects your project. When your project is approved, you can get to it from your *My Projects* page or from the **Projects** menu in your navigation bar.

Add users to a project

Before a person can work on a project, you have to make them a member of the project.

You can make any registered user on your CollabNet TeamForge site a project member. You can assign roles to the user at the same time.

1. Click **Project Admin** in the project navigation bar.

2. On the **Project Admin** menu, click **User Membership**.

3. Click **Add**.

4. On the *Add User page*, find the users you want by one of these methods:

    - Under *Search for Users*, filter the list of site users eligible to join this project. You can filter by full or partial name or user name.
    Note: Search text is not case-sensitive.
    - Browse the list of registered users on the site. Sort them by name, user name, email address, account type, or membership status.

    - **Tip**: If a site has many users, filter them first to narrow down the list.

5. Select the users you want to add.

6. Under **Assign Roles**, select the roles you want the users to have.

    Tip: If you prefer, you can skip this step and assign roles later, using the **Project Admin > Permissions page.**

    Note: A user's license type also influences what the user can see and do on your site. A user's license type supersedes any role assignments.

    - An ALM license enables the user who holds it to use the full range of TeamForge features: both the core source-code management tools and the extended application lifecycle management functionality.
    - An SCM license enables the user who holds it to use the core TeamForge source-code management tools.

7. Ask your site administrator how many licenses of each kind are available for your users.

8. Save your changes.
    - Click **Save** to return to the *Project Membership* page.
    - Click S**ave and Add More** to keep adding users.

Create a project page

To provide information and functionality to people viewing your project, build one or more project pages.

1. Go to the page to which your new page will belong.

   Tip: Any project page can have sub-pages belonging to it. A page that belongs directly to the project home page is called a "top-level page."

2. Click **Configure: On**.

3. Choose where your new page will fit in your project's structure.

   - To create a page just under the project home page, click **Add top-level page**.

     A top-level page's title is always visible in the navigation tree at left.
   - To create a page under the page you are on right now, click **Add sub-page.**

4. Give your new project page a title. Keep the title brief and descriptive.

5. Choose who can see this page.

   Note: Your choice will apply to all subpages that you create under this page.

   - To show this page to anyone with the necessary permissions, select **Visible**. For example, if you have defined a group of users who have access to your project, your new project page is visible only to those users. If your project is open to the public, anyone in the world can see it. Use this option when the information on this page is ready for a wide audience.

   - To show this page only to users with the project administrator role, select **Hidden**. Use this option if you are drafting content that you aren't ready to share yet, or want to share only with other project managers.

6. Click **Save**.

7. Click **Configure: Off.**

Now you are ready to build functionality into your project page with components such as text, news or tracker queries.

Create a tracker

Create a tracker whenever you need to report and track bugs, feature requests, support requests, or any other type of issue where ownership, status, and activity must be managed.

Individual tracker entries are referred to as tracker artifacts. A tracker is a set of tracker items with a common purpose, such as bug reports, feature requests, or tasks.

1. Click **Project Admin** in the project navigation bar.
2. Click **Tracker Settings**.
3. Click **Create**.
4. On the Create Tracker page, provide a name and description for the tracker.

   Tip: Descriptions help users learn how best to provide the information you want from them. To maximize your chances of getting useful data, make your description as informative as you can.
5. Select an icon that suggests the type of work the tracker is handling. This icon will appear with any artifact in this tracker, wherever it is viewed on the site. For example, if someone brings an artifact from this tracker into a planning folder, users of the planning folder can glance at the artifact's icon to know it comes from.
6. Click **Create**.

The tracker is created.
Before entering artifacts, configure the tracker fields and auto-assignment rules.

Create a planning folder

Create and populate all the planning folders you need to capture the work you are planning.

A planning folder is a way to organize work into feasible chunks and monitor its progress.

Tip: It often makes sense to set up planning folders *after* you have outlined and analyzed the features you plan to deliver. See Define the scope of your project.

When you've thought about the general categories the work falls into, you are ready to create planning folders that reflect those ideas.

A planning folder can represent:

- A set of tasks, such as Iteration 3, or "Initial infrastructure development."
- A period of time, such as "April," or "Q2-2010."
- A phase of development, such as "Testing" or "Deployment."
- A component of the product, such as "Chapter 12" or "Rear stabilizer."

1. Click **Tracker** in the project navigation bar.

2. Under P**lanning Folders**, click Root Folder, then **New**.

3. In the view, right-click the Planning Folders node or an existing planning folder and select . A planning folder in the has the same context menu option.

4. Give your planning folder a brief and descriptive name. For example, in an agile project, you'll probably want two or more iterations. Make a planning folder called "Iteration 1," another called "Iteration 2," and so on. In a phased, waterfall-style project, you might name your first planning folder "Design," the next "Build," and so on.

   Tip: Don't worry if you don't have anything of interest to put into your planning folders yet. The parallel process of filling out the feature tree will provide plenty of material for this.

5. Use the **Description** to briefly signal the kind of work that will be contained in this planning folder. Include enough information to help people get up to speed quickly whey they join your project. But save most of the detail for the individual tracker artifacts, where project members will spend most of their time.

6. Select a start and end date for the work that this planning folder will contain. You can change these dates at any time. It's important to specify dates even if they're not firm, however, because a variety of useful visual aids and reports depend on them.

7. Click **OK**.

Set up hardware for your team to use

When you set up Lab Management, your team members can use TeamForge to access their own virtual machines for developing and testing.

1. Get CollabNet TeamForge Lab Management .

2. On the **Project Admin** menu, click **Linked Applications**.

3. On the Linked Applications page, click **Create**.

4. On the Create Linked Application page, enter the name **Lab Mgmt**.

5. Enter the server location or URL of your Lab Management server.

6. If you are a CollabNet TeamForge administrator, select whether you want to use single sign-on for the linked application.

   - If you use single sign-on, CollabNet TeamForge manages authentication for Lab Management, and users don't have to log into Lab Management after they have logged into CollabNet TeamForge.

   - If you do not use single sign-on, users must log into Lab Management using its native authentication system.

7. Click **Browse** and select this icon for the linked application:
   
   This icon will appear with the name **Lab Mgmt** in the project navigation bar.

8. Click **Save**.

A **Lab Mgmt** button is added to your project navigation bar. Clicking it launches the application in the main CollabNet TeamForge project window.