

Project Management 101

Using PHPCollab



What is a Project?

- Who are projects for?
- What are we doing in a project?
- How do we document what we do?



How do we Manage Projects

- We are constantly balancing competing factors in project management ... three are fundamental to ALL projects
 - Quality or Features
 - Time or Schedule
 - Resources (money & people)
- You can only control two of the three, not all of them



Managing Collaboration



- Projects are usually done by TEAMS
- Successful teams collaborate to complete their tasks

- What IS Collaboration?
 - Working for the TEAM
 - Sharing information widely
 - High level of trust
 - Values, vision, & objectives are shared by all

All Projects have Structure



- VPIC – Visualize, Plan, Implement, Close
 - Visualize – See the end at the beginning
 - Plan – Plan forward or backward, but plan
 - Implement – A juggling act between what you THOUGHT you could do when you planned it and what you actually find when you DO it

“Every fighter has a plan until they get hit!”

 - Close – It’s not over until everything is properly closed and critiqued

Visualize



- Begin at the end by visualizing the end result. Vision creates enthusiasm. We must define SUCCESS at the beginning of the project.
- The project definition should be SMART:
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-dimensioned

Plan



- Constraints - what are they and what are their priorities
- Hot Spots - what are they and how do we avoid them
- Hunks, Chunks, and Bites – splitting up the project into smaller and smaller pieces until you get bites small enough for your DayPlanner
- What is the sequence? – Order the pieces to get them done
- Who is responsible? – assign the responsibility for each part
- When? – determine when each task will be done
- Cost? – what will it cost to do the project?

Implement



- Delegation
- Coordination
- Collaboration
- Review & status meetings

- It should all run through your DayPlanner

Close



- Don't forget to
 - Review the project
 - Celebrate Completion

PHPCollab Orientation



- Quick Overview
- Sample Projects Setup for all to look at
- We'll walk through the parts of Collab and then work through an example

Projects



- Projects represent the overall objective you are trying to accomplish.
- If you are the Project Manager, you need to establish:
 - Priority – should be given to you as PM
 - Description – SMART description
 - Client – should be given to you as PM
 - Status – maintain and update this status

Project Description



- Describe the end result, the vision of the end point. Make the description a SMART description:
 - Specific
 - Measurable
 - Achievable
 - Relevant
 - Time-dimensioned

Tasks



- Tasks are the specific jobs you need to do.
- These may be Hunks, Chunks, or Bites
- You are responsible for keeping up the status of your own tasks

- You should keep up:
 - The task status
 - The start and stop dates
 - The estimated time
 - The actual time

Discussions



- Open discussion between project members is an important part of collaboration
- We want to discuss important issues
- The first place to seek help is by opening a chat thread
- Look for ideas from everyone available in the team

Reports



- We haven't worked out just what we want to do here yet

- We will establish standard reports that can be run off the Collab database to report on project and/or task status

Notes



- Notes should be used to record information about the project
- Think of the notes as:
 - Reminders
 - A Project Journal
 - Idea or Thought Pieces
- Notes should be short and concise
- This isn't a discussion area, but rather a place to capture important information

Your Preferences



- *Personal preferences*
- *Password*
- *Notifications*

Clients



- Owner - drop-down of existing team users; defaults to current user
- **Name** (required) - company name
- Address - company street address
- Phone - company telephone
- URL - company web site address
- Email - general company email address
- Comments
- Logo - company logo (if uploaded, will appear on Client Project Site)

Client Users



- **User Name** (required): Up to 16 characters - the name with which the client will login to the client site
- **Full Name:** Last and First Names
- **Title:** (optional) Client's job title
- **Client Organization** (required): Drop-down of existing client organizations in the system
- **Email** (optional): used for notifications
- **Work, Home, Mobile, Fax Phone Numbers**
Comments
- **Password** (required): Up to 16 characters, letters, numbers, case-sensitive

Projects



- **Project Name** (required): Up to 50 characters
- **Priority** (optional): Very High, High, Medium, Low, Very Low
- **Description** (optional)
- **Development Site URL:** if using a testing site
- **Final Site URL**
- **Owner** (required): Drop-down of existing team users in the system
- **Client Organization** (optional): Drop-down of existing client organizations in the system
- **Enable Phases** (required): Drop-down of project types which will create certain phases (this can be customized)
- **Status** (optional): Not Started, Open, Suspended, Client Completed, Completed

The Project Page



- Project Details
- **Project Site Create**
- Support requests information
- Discussions
- Team members list
- Linked Content (documents)
- Notes

Project Members



- Who is involved in the project? Who is going to be assigned tasks?
 - Project Owner
 - Project Manager (normally the same as Owner)
 - Doers who actually work on the tasks and subtasks
 - The owner of a task should maintain the status of the task
 - The project manager should define tasks and assign ownership
 - No one has responsibility for a task until they accept it!

Project Tasks



- **Project** (required): Drop-down of existing projects in the system
- **Task Name** (required): short title of task (ie - "Create Site Map")
- Description
- Assigned To (optional): Drop-down of team members on that project and client users if added to client site
- **Phase** (required): list of phases enabled for that project
- **Status** (required): Not Started, Open, Suspended, Completed, Client Completed
- Start Date (optional): the Calendar button opens a calendar from which to choose a day
- Due Date (optional): this is a projected not an actual date
- Estimated Time (optional): in hours
- Actual Time (optional)
- Comments (optional)

Tasks & Subtasks



- Tasks are the major hunks of the project
- Subtasks will normally be the chunks that need to be done
 - Bites would be small pieces of a subtask corresponding to what 1 person could do in an hour or two
- Most projects will be structured by the tasks and the subtasks will correspond to the things that need to be done
- More complex projects should be split into more than one PHPCollab project

Task & Subtask Descriptions



- These must be CLEAR and CONCISE
- Clarity is the PRIMARY virtue
 - Use as much space as you need to be clear
 - What is the task about?
 - What is the end this task is to reach?
 - What is the vision of the task's completion?
 - Any complex task should be broken into subtasks

Linked Documents



- Add any documents here that are important to the project. This might include anything in nearly any format including:
 - Project Planning & Vision Documents
 - Microsoft Project Plans
 - Charts, Diagrams, or additional material
 - Programs or other executables
- Or anything else that documents the project

Reports



- We can run a wide range of reports at any time that will meet established criteria.
- Simple reports are preprogrammed
- As we get more experience, we will add additional reports
 - Project status
 - Task status

Calendar



- The calendar shows start and stop dates for tasks on the project
- This can be useful or easily get overloaded

- Make sure that your start & stop dates are realistic
 - Take into account known delays
 - Base your estimates on NORMAL days
 - Allow time for the unexpected

Bookmarks



- Bookmarks are especially useful when we need to refer to:
 - Existing web pages we are working on
 - Material we are referring to that is online
 - Content that is available elsewhere
 - Customer sites relevant to a client
 - Examples of competitive sites

Build a Project



- We're going to build a project in real time

- Everyone should follow along as we work through the definitions and assignments
