DevPlan User Guide

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DevPlan User Guide

Features Overview

Built-in support for iterative development.
Work item tracking with configurable workflows.
Track resource utilization across all projects.
Roll up actual data from tasks to the project plan.
Event tracking for meetings, conference calls, and other tasks (with Outlook integration too!).
Subscription-based email notifications.
Automatic routing and escalation for tasks.
Integrated Knowledge Base: Share data across all projects.
Web-service based architecture.
Dozens of built-in reports.
Import and Export from MS Project**.**

Chapter 1- Project Mangement with DevPlan

TechExcel DevPlan is a tool for planning and managing the software development life cycle for distributed development teams.

1 Understanding TechExcel DevPlan

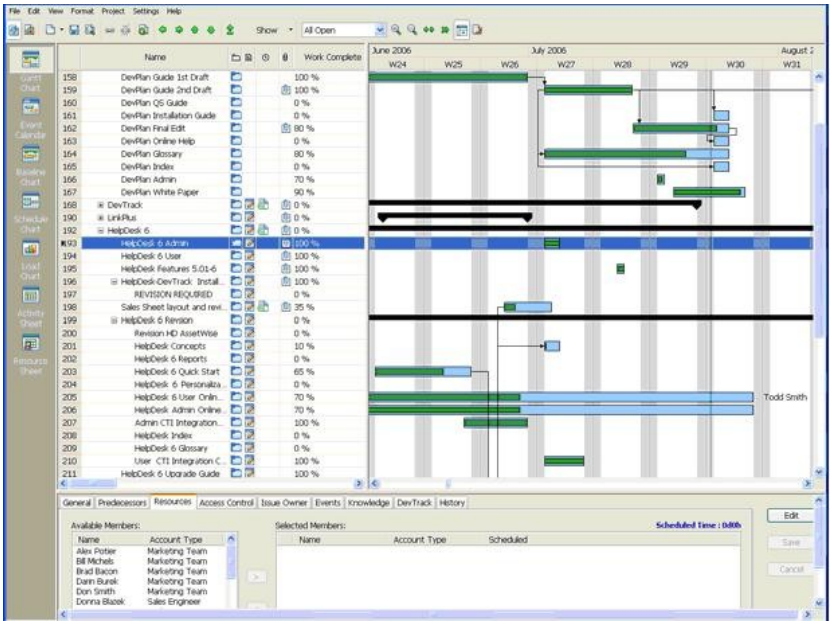
Using DevPlan, project managers may design and document a fully conceptualized ?esigned product?and plan and manage the implementation of that design within a single interface.

The product that is described and documented in the control documents (business requirements, functional specifications, technical specifications, etc.) is articulated in the DevPlan client by a hierarchical tree structure that both represents the ?esigned product?and is used to implement those designs.

Every area of work is represented by a subproject folder in the subproject hierarchy. A subproject is a discreet area of work that corresponds to a specific product, feature, version, or build. The subproject hierarchy represents all of the products, features, versions and builds as subprojects in a hierarchical structure and clearly defines the relationships between each area of development.

The subproject hierarchy is the framework for all planning and development so the documents linked to a subproject are accessible in both DevPlan and DevTrack.

All project planning and project management tasks in DevPlan are based on a subproject tree structure that both represents the ?esigned product?and work breakdown structure that will used to implement that vision.



The subproject hierarchy, as defined in DevPlan, is visible in both DevPlan client and an integrated TechExcel DevTrack project. Project planning and implementation are managed within a common subproject hierarchy that enforces good development practices and accountability and enables collaboration between distributed teams.

The subproject tree structure as displayed in the DevPlan and DevTrack clients provides project managers, designers, and developers with a visual representation of the product or products in development. Managers and developers can see the product and its features in the tree structure and assess the status of all areas of development in the DevPlan client.

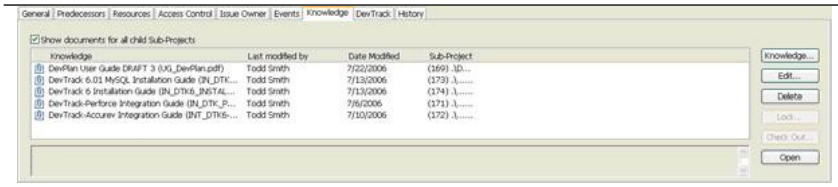
2 Product Design and Knowledge Management

The application development life cycle begins with the design of a product. Software products are generally planned and defined and in a series of control documents: business requirements, functional specifications, technical specifications and other documents.

But to see the ?esigned product?described in the design documents realized, an organization must ensure that all project stakeholders have access to the most up-to- date documents and that project managers and team leaders are held accountable for implementing features as they were designed.

The DevPlan subproject hierarchy organizes all areas of development, all products, features, versions, and builds, into subprojects. Control documents may be directly linked to each subproject providing all stakeholders with access every document that is specifically relevant to that area of work.

Linked documents, HTML links, and knowledge topics are displayed in the Knowledge tab of the subproject detail window.



The Knowledge list displays high-level information of the documents linked to a subproject including its title, the name of the user that last modified the knowledge item, the date that the documents was last modified, and the ID number of the subproject with which it is linked.

3 Planning and Resource Management

The subproject architecture, once created, defines the scope of the project, its work breakdown structure, and serves as the foundation for all project schedules, durations, dependencies, and milestones.

All areas of work (the products, features, versions, and builds) are represented as subprojects in a hierarchical tree structure. Explicit in this architecture is the definition of controlling relationships between subprojects. The durations and dependencies of low-level tasks define the length of the project as a whole.

During the planning stage project managers may use DevPlan to define subproject durations, dependencies, critical paths, resources, and baselines all within the framework of the subproject hierarchy.

?Durations : Project managers may define the beginning and end dates of all subprojects.

?Dependencies : The logical relationships between subprojec ts is defined within the framework of the subproject hierarchy and subproject durations.

?Critical path : DevPlan automatically calculates the critical path based on subproject durations and dependencies. The critical path defines the length of the project.

?Resource allocation : Based on subproject definitions, the project manager may allocate resources to subprojects and adjust durations as necessary.

?Baselines : The optimized project plan is saved as a baseline. The success of the project may be measured against this original estimate. New baselines may be created and compared throughout the life of the project.

Subproject Durations

Using the subproject hierarchy as a framework for understanding the scope of the project, project managers may begin planning the project by defining the duration of subprojects in the DevPlan client.

The duration of a subproject is the total time required to perform the tasks required to implement the feature represented by that subproject. These tasks, called development issues, are managed and tracked in the DevTrack client.

The duration of subprojects ?oll up?the subproject hierarchy. Each subproject in the hierarchy may represent one or more child subprojects which may, in turn, represent their own children. Each parent subproject is a summary subproject: the duration of that subproject is based on the duration of its children. By defining the duration of low-level subprojects, the duration of the high-level subprojects, and the project itself, emerges in DevPlan.

Project managers may define the duration of a subproject by defining the beginning and ending date of the subproject or by defining the duration in the General tab. Alternatively, they may simply select the end of a subproject bar in the DevPlan gantt chart and drag it to the right to extend its end date.

Project managers may then link subprojects together based on project dependencies. A dependency is a link between two subprojects that defines a controlling and frequently, temporal, relationship between the two activities: the beginning or end of one subproject is controlled by the progress of another subproject. For example, one subproject may require that another activity (its predecessor) be completed before it can begin.

DevPlan enables project managers to define four types of dependency relationships in DevPlan: finish-to-start, start-to-start, start-to-finish, and finish-to-finish.

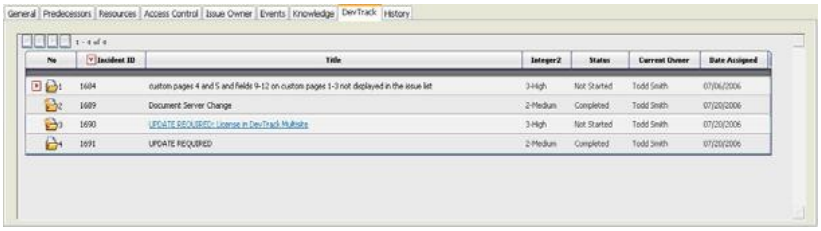
4 Implementation Management

The documents and subproject structure enable project managers to effectively manage the implementation of those plans in DevTrack. DevPlan integration with TechExcel DevTrack enables project managers to focus on high-level project planning and management tasks while the development work is managed and tracked within DevTrack.

Project planning, scheduling, and the duration of subproject may still be managed in DevPlan, but low-level development tasks are managed using the issue life cycle and workflow rules in DevTrack. In project management terms, the terminal elements , the lowest activity in a work breakdown structure, are represented and tracked as issues in DevTrack projects.

Tracking DevTrack Development in DevPlan The common structure for planning and development provides developers visibility to the work breakdown structure represented by the subproject hierarchy and project managers visibility to the development issues and QA test issues created in each area of work.

DevPlan project managers may use the DevTrack tab in DevPlan to quickly assess the progress that is being made in implementing the area of work represented by every subproject.



The DevTrack tab in the DevPlan client displays high-level information about every issue associated with the subproject including the issue ID, its priority, workflow state, and the issue owner. Moreover, general subproject properties including subproject durations, start and end dates, and the percentage of the project complete may be updated and managed from within the DevTrack client. All subproject updates defined in DevTrack are

immediately displayed in the DevPlan Gantt charts.

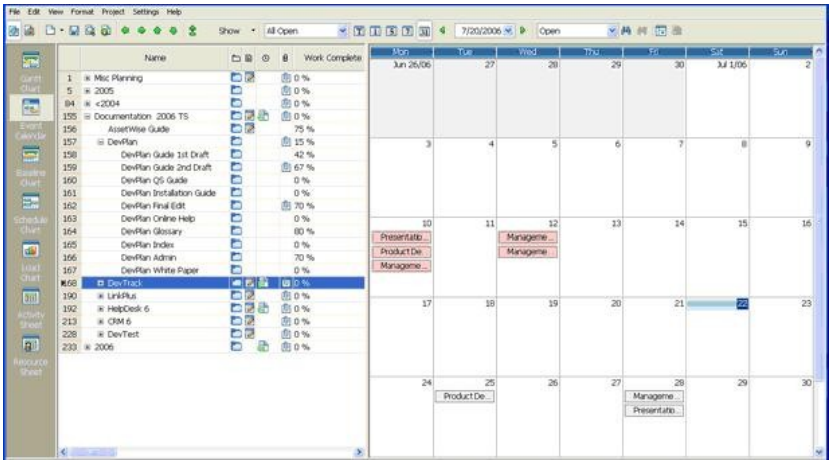
5 Collaboration and Quality Management

Throughout the project planning process, project managers may schedule and manage subproject team meetings as subproject events.

A subproject event is a management task linked to a subproject that facilitates communication and collaboration between subproject stakeholders. Typical subproject events include brainstorming sessions, team meetings, design reviews, management reviews, presentations, and product demos.

Subproject events are the vehicle that drive the planning process and ensure the quality of the end product.Regular team meetings scheduled within DevPlan enable project managers ensure that all project team members are working together to meet project objectives. And every subproject event has one owner that is responsible for the success of that event.

The subproject event owner may define the start and end time of the event, invite attendees, and manage the status of the event in the Events tab of the Subproject detail window or in the Event Calendar.



The Event Calendar displays all subproject events during a defined period of time. Users may filter the events displayed in the Event Calendar by subproject, or choose between daily, weekly, or monthly calendar views. E-mail integration provides project managers with a powerful scheduling system for inviting subproject stakeholder

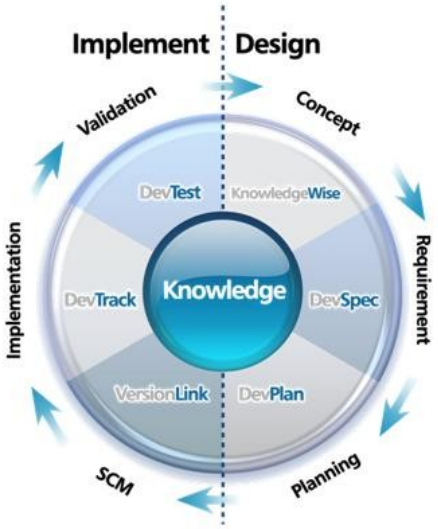
Chapter 2- DevPlan as part of DevSuite

Wiki Summary.

1 The ALM Process in DevSuite

TechExcel DevSuite is a family of integrated application lifecycle management (ALM) tools that place knowledge management ?rom ideas and requirements to formal specifications, to competitive information to issue resolution and customer insight?t the core of any product development initiative. By facilitating access to information and communication between distributed development teams, DevSuite enables enterprises to improve the efficiency and quality of their end products.

The DevSuite knowledge-centric strategy enables improve communication, keep up-to-date on changes, and reduce the development cycles so that the business may deliver the right products for the right markets in the shortest possible time. DevSuite enables distributed software development organizations to manage every aspect of the application development life cycle from the initial design in DevSpec, project planning in DevPlan, product development in DevTrack, and QA testing in DevTest. The foundation of all these processes is a common knowledge base managed in KnowledgeWise.



2 DevSuite Modules

KnowledgeWise--Concept

TechExcel DevSuite leverages intellectual assets with KnowledgeWise, communicating a clear product vision and tactical execution strategy by linking ideas and customer feedback, specifications, requirements, designs, prototypes, and other documents to specific areas of work during a development project. Documents are shared with all resources involved in the execution of the project allowing for an uncompromised vision to direct the path of any development project.

DevSpec--Strategy

TechExcel DevSpec is an integrated requirements management solution that is specifically designed to provide visibility, traceability and validation of requirements and feature designs.

DevPlan--Planning

TechExcel DevPlan is a project and resource management tool that enables development organizations to manage the transformation of a ? onceptual product??as defined in requirements and specifications ?into product deliverables on time and on budget.

DevTrack--Implementation

TechExcel DevTrack enables development teams to manage every aspect of the development process including issue management, team management, and communications management.

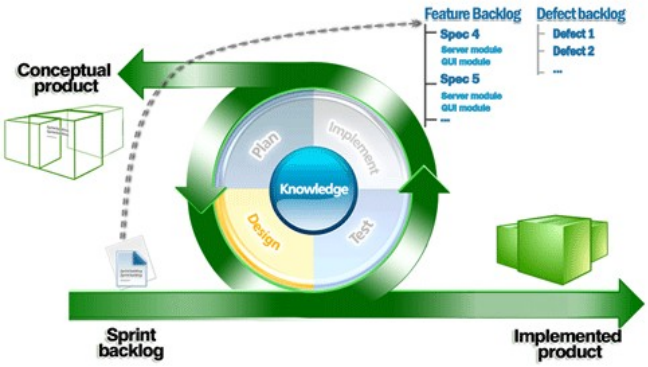
DevTest--Validation

TechExcel DevTest is a test management solution that enables test organizations to manage every stage of testing life cycle from test case design, to test execution, to test analysis. DevTest provides testing groups with the tools they need work more effectively and efficiently, hold down costs, and to deliver higher quality products.

3 Agile Development using DevSuite

Customer requirements and business logic can be illustrated and quantitatively represented to form the conceptual product. This conceptual product is ever evolving and improving just like software being developed.

The process has let us incrementally build and develop both the conceptual product and the implemented product.Better process coordination between the business team and the development team can therefore be accomplished. We enable the business team to deliver the conceptual product and the development team to develop software based on the conceptual product. This sort of development is more disciplined and better documented. It is also more agile because requirement changes can be more effectively communicated using working software as a reference. This diagram represents one iteration of a blueprint project. Each iteration provides a better understanding and improved communication between customers, business people, and developers.



4 DevPlan and DevTrack

DevPlan integration with TechExcel DevTrack enables project manager to focus on high-level project planning and management tasks while the development work is managed and tracked within DevTrack.

- DevPlan is a tool for defining and managing planning processes and high-level implementation of the “designed product” represented by the work breakdown structure.
- DevTrack is the tool that enables organizations to make that vision a reality. DevTrack comprehensively tracks and manages all product defects, change requests, and all other development issues.

The subproject hierarchy, as defined in DevPlan, is visible in both DevPlan and the integrated DevTrack projects and is the framework for all project planning and development. DevTrack development issues are submitted to and managed within subprojects and project managers may view the development issues that are assigned to each subproject within the DevPlan client.

4.1 Understanding DevTrack Development Issues

An issue is a collection of data that represents a particular task or set of tasks that must be processed in the course of a development project. Every issue is defined by a unique issue ID, description, workflow state, owner, work description, and other dynamic properties.

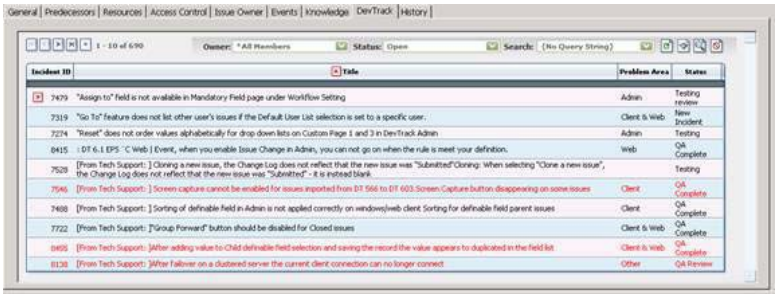
DevTrack issues define development tasks and enable organizations to mange and track those tasks in project workflow. Project members may define, update, and manage issue data, add notes, note attachments and screen shots, view issue history, or create links between related issues in the DevTrack Web and Windows clients.

Project members may assign DevTrack development issues to development subprojects to schedule, prioritize, and

track those issues separately from other issues in the project. Within DevTrack, a subproject is viewed as a logical grouping of development issues that are managed together as a group.

4.2 Tracking Development Issues

The issue list control in the DevTrack tab displays high-level data about the development issues that are managed within each subproject. Development issues are organized into rows and columns in a tabular report. Each column contains data in a specific field.



The issue list displays the issues managed within a specific subproject. DevPlan enables project managers to further filter the development issues that are displayed in the issue list control of the DevTrack tab based on development issue properties.

- The User List dropdown list enables project managers to filter development issues by issue owner. The issue owner is the DevTrack project member that is responsible for an issue in the DevTrack project.
- The Status dropdown list enables project managers to filter development issues by issue workflow status. Each development issue workflow status represents a stage in the life cycle of a development issue.
- The Quick Search button project managers to define custom queries to locate development issues based on issue property values.
- The Search button enables project members to filter the records displayed in the Issue List based on customized searches.

4.3 Filtering Issues by Workflow Status

To filter development issues by issue workflow status, select a DevTrack project issue workflow status in the Status dropdown list of the DevTrack tab in the subproject detail window.

Development issues with the selected issue workflow status are displayed in the issue list control in the DevTrack tab.

4.4 Filtering Development Issues by Issue Owner

To filter development issues by issue owner, select the user name of a DevTrack project member in the Owner dropdown list of the

DevTrack tab in the subproject detail window. Development owned by the selected project member are displayed in the issue list control in the DevTrack tab.

4.5 Managing Development Issue Quick Searches

DevTrack Quick Search enables project members to define, save, and update quick searches in the DevTrack Web client without opening another page.

DevTrack Quick Search enables project members to search for issues based on user-defined search parameters. Project members may create, define, update, rename, and save quick searches in the Quick Search panel within the DevTrack Web Client.

The Quick Search panel displays a set of controls that enable project members to alternatively execute or manage quick searches. Project members may display or hide the Quick Search panel by clicking the Quick Search button in the Search bar.

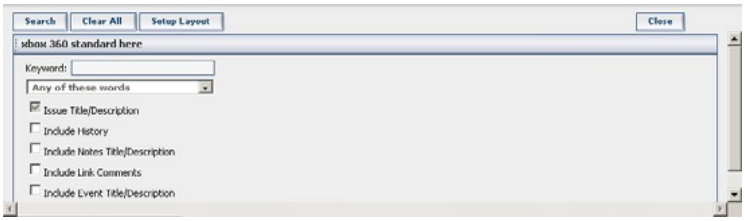
The Down Arrow button in the Search bar displays the Quick Search panel

The Up Arrow button in the Search bar hides the Quick Search panel

The Quick Search panel may display two different modes in the DevTrack Web client.

- The Quick Search query mode
- The Quick Search definition mode

The query mode of the Quick Search panel enables project members to quickly define and search for issues based on user-defined keywords.



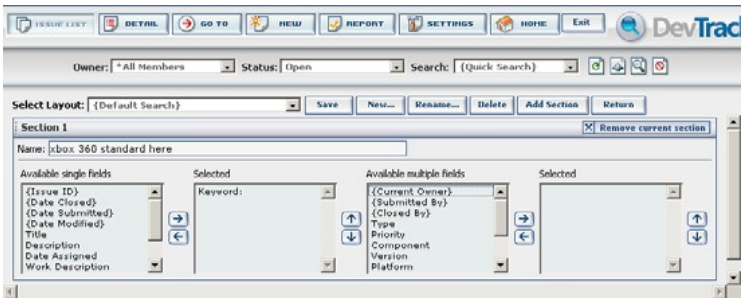
Quick searches may be based on user-defined keywords. Project members may define one or more keywords and the logic of the search in the Quick Search panel. Searches may apply the Any of these Words, All of these Words, Exact Phrase, or None of these Words search logic to the keywords defined in the query.

Project members may also define which fields are searched by selecting one or more of the options displayed in the Quick Search panel: the Issue Title/Description, Include History, Include Notes Title/Description, Include Link Comments, and Include Event Title/Description options.

The Quick Search panel displays three buttons in query mode.

- The Search button immediately executes the quick search.
- The Clear All clears query parameters and keywords.
- The Setup Layout button displays controls that enable project members to manage quick search parameters and settings.

The definition mode of the Quick Search panel enables project members to may create, customize, delete, rename, and save quick searches.



Project members may create, edit, delete, rename, and save quick searches in the Quick Search Layout panel.

- Project members may add or remove sections. The maximum number of section allowed is defined by an administrator in the DevTrack Admin client (5).
- Project members may edit each sections name
- Project members may add/remove fields to each sections
- Project members may add to each section will be automatically arranged
- Project members may delete current search

- Project members may save as new public/private search (public search need privileges)

5 DevSpec and DevPlan

For DevPlan users to plan projects efficiently, it is essential that they clearly understand the proposed design, features & specifications that will drive the future implementations. Since all Requirements, Design and Concepts are well tracked and managed in DevSpec, it would be nice to have a view or window to DevSpec from within DevPlan. This will empower Project Managers working in DevPlan to better understand the features and therefore better plan a project.

Generally, a Product design consists of complete specifications that include:

- Functional requirements and design documents
- Product components and breakdown
- Design parameters and feature specifications
- Architecture and database design documents
- Programming logic and QA test case documents
- Business logic and user interface design

All these items are managed in DevSpec and serve as guidelines for developers during product implementation phase. So it is equally important to link these documents with appropriate development work items. DevSpec-DevPlan integration facilitates accomplishing this goal.

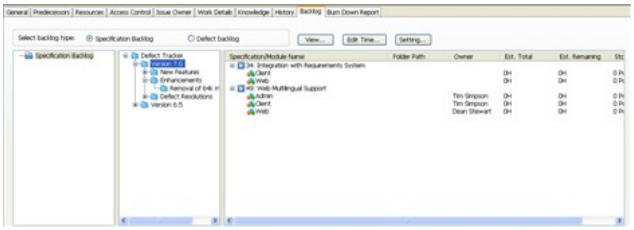
5.1 Understanding DevPlan integration with DevSpec

When a Requirement/Specification in DevSpec is ready to be implemented, it is assigned to a Product Backlog through the Implementation Module feature.

With the help of DevSpec-DevPlan integration, this Backlog is made available to the DevPlan users.

The specification backlog enables development organizations to organize and prioritize features—as defined by DevSpec specifications—that have been approved for development, but which have not yet been committed to a particular subproject.

Using the backlog, Product & Project managers may identify those features that are the highest priority for the business, schedule those specifications for development by assigning them to a sub-project or a sprint. In DevPlan, this is done on the “Backlog” page for a highlighted sub-project. This requires simply dragging a Specification from Backlog and dropping it into a sub-project or sprint.



5.2 Backlog Management

Backlog Management is an essential part of Agile Development. It allows enterprises to achieve more mature development process control.

The Product Backlog can be formally defined as the specifications that are ready to be implemented. While a specification in DevSpec represents a feature, enhancement, change, or defect to be fixed, it becomes a backlog item once it is ready to be implemented. Backlog items represent a link for a specification to be implemented within a certain development iteration. A specification may need to be implemented multiple times, and therefore can be linked with multiple implementation links.

Backlog Management enables DevSpec users to easily move a committed Specification or Feature to a temporary repository of prioritized items, before these items are actually scheduled in DevPlan.

In DevSpec, the Backlog tab allows users to select a specification and easily add to the appropriate Product Backlog folder.

DevSpec further use a concept called implementation modules, which can be used to more formally represent the relationship between areas of the product design and the implementation backlog.

While adding a Specification to the Backlog, users can also select different areas of development the particular Specification needs to be completed in.

Project Managers then take this specification from the priority list and include it in a Product Module, assign timeline and resources.

As soon as this is done, the items under Implementation Module shows “Play” sign indicating work in progress. All such items are organized under the “Assigned” folder.

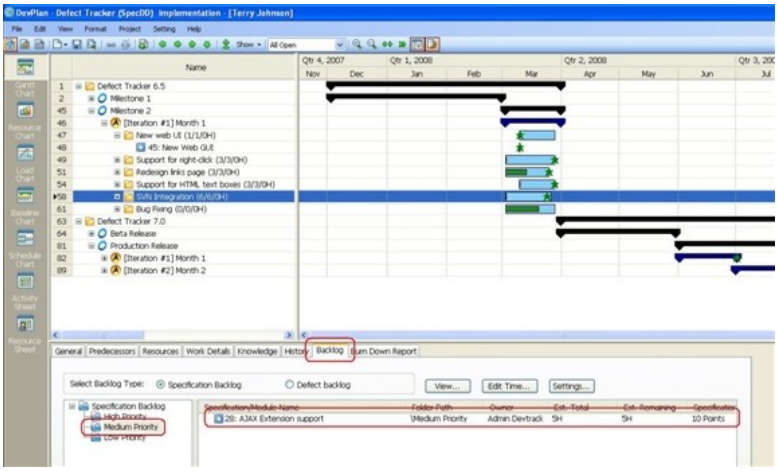
This action can also be performed by clicking the button on the Backlog tab. Only users with appropriate privilege in DevPlan can perform Implementation Link assignemt.

Once a Specification in DevSpec is assigned to Product Backlog, it becomes available for Project Managers in DevPlan to be scheduled in one of the Sub-projects or Sprints. Users in DevPlan can simply go into the Backlog folder, drag the specification from Backlog folder and drop them into appropriate Sub-project or Sprint. This enables each specification in DevSpec to be linked with a project in DevPlan. This enables Project Management and Product Management teams to collaborate better by providing visibility across DevPlan and DevSpec. This facilitates better tracking, controlled processes and quantifying product design.

To add specification from Product Backlog into a Sub-Project or Sprint :

1. In Gantt Chart View, go to Backlog tab and make sure Specification Backlog radio button is selected

2. Highlight the appropriate Specification Backlog folder



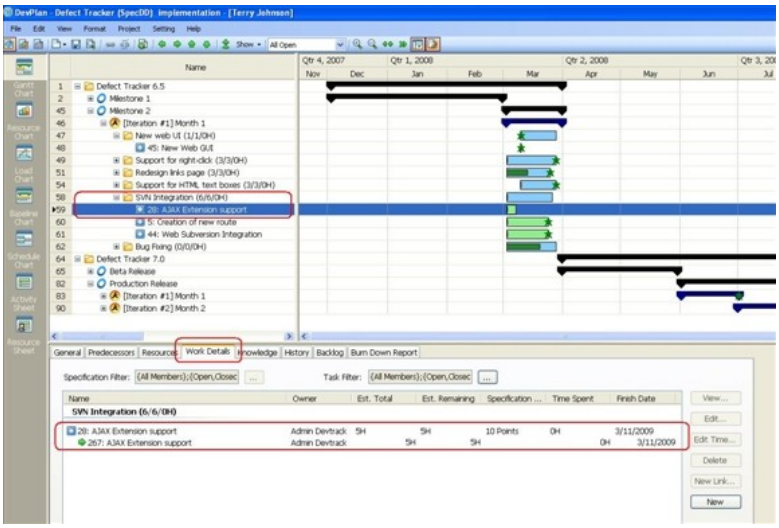
3. Drag the desired Specification and drop it into a Sub-project

Note : DevSpec users with appropriate privileges in DevPlan can do so from within DevSpec Client (DevPlan window can be launched from within DevSpec Client)

Once a specification is assigned to a Sub-project in DevPlan, it will automatically create a work item in DevTrack for the Implementation/Development team to implement.

(Note : This automation can be restricted by changing the DevSuite Admin Configurations)

Project Managers in DevPlan will be able to highlight a Project or Sub-project in Gantt Chart View and view the Specification details as well as Implementation Work Item details by clicking on the “Work Details” tab.

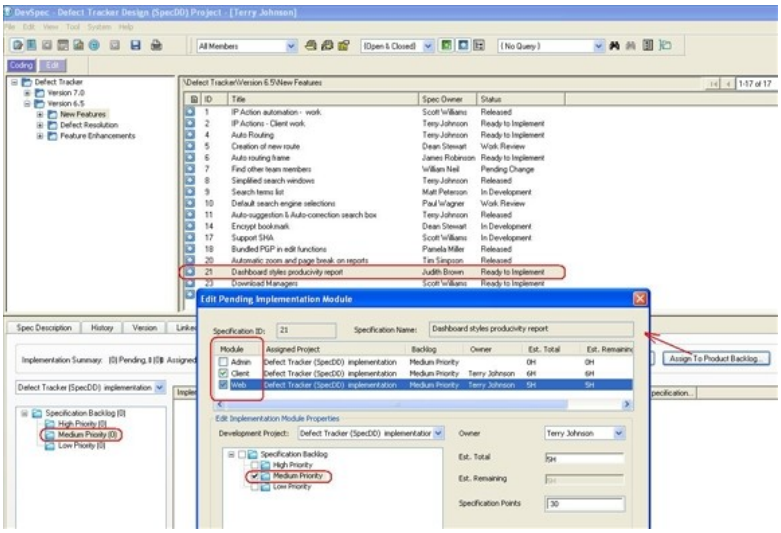


DevPlan users can also view any related files/documents attached to a Specification that is linked to a sub-project/sprint. They can also access other Knowledge Article and Requirements linked the Specifications.

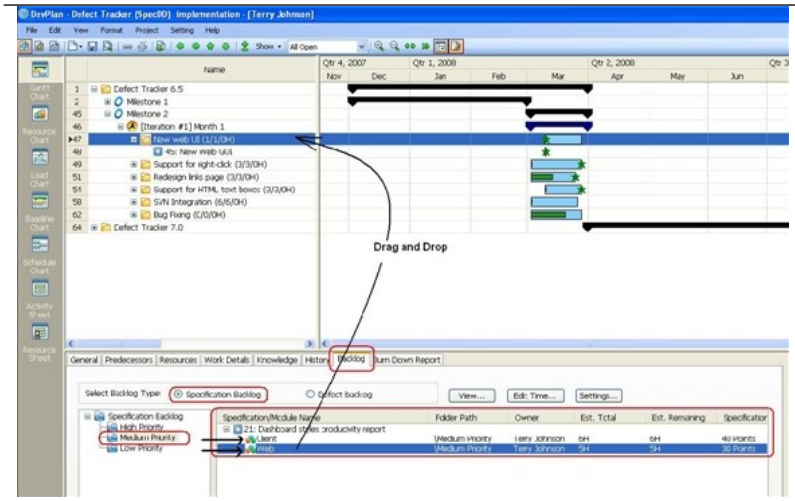
5.3 Implementation Module

DevSpec further use a concept called implementation modules, which can be used to more formally represent the relationship between areas of the product design and the implementation backlog.

While adding a Specification to the Backlog, DevSpec users can also select different Areas of development the particular Specification needs to be completed in.

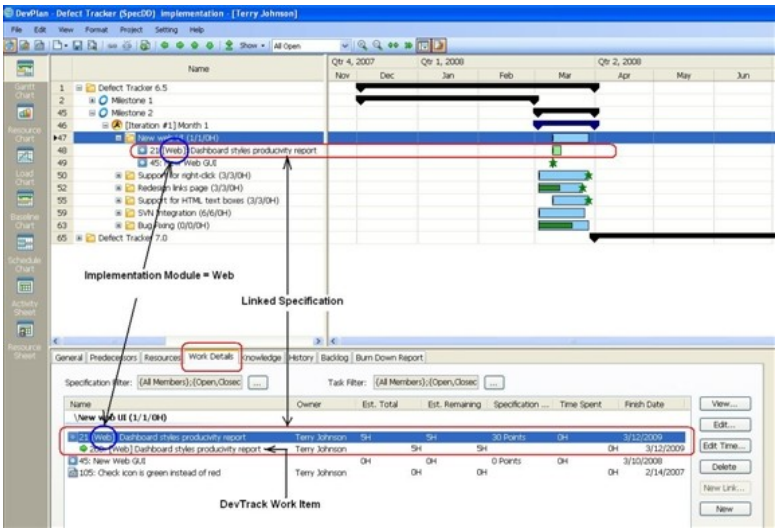


Project Managers in DevPlan, then take this specification for an Implementation Module from Backlog and include it in a Product Module (or Sub-project)



This action can also be performed in DevSpec by clicking the Goto DevPlan... button on the Backlog tab. Only users with appropriate privilege in DevPlan can perform Implementation Link assignemt.

Once a specification for an Implementation Module is assigned to a Sub-project in DevPlan, it will automatically create a work item for this Implementation Module in DevTrack.
(Note : This automation can be restricted by changing the DevSuite Admin Configurations)



Chapter 3- DevPlan Client Basics

In this chapter:

- Understandingthe DevPlan Client Workspace
- Accessing Projects, Views, Charts, and Bars
- Understanding Client Personalization
- Selecting Gantt Chart Styles
- Selecting Standard Gantt Chart Bar Styles
- Managing Custom Bar Styles
- Managing Subproject Column Settings

1 Getting Started

DevPlan implements project-level security by assigning a unique user name, password, and account type to every project team member. To access DevSpec projects, the user must enter a valid login name and password in the DevPlan*Log on*dialog box.

The password is the user's personal key to the DevPlan system and its projects. The user name and password enable the DevPlan system to identify, control, and track the changes that each user makes to project data. Passwords provide accountability for all transactions and other changes to project data and enable the organization to ensure that only authorized individuals may access and change project data. The*Select Project to Login*dialog box displays all of the projects that are available to the user.

All DevPlan user names and passwords are defined and managed in the DevSuite Admin client.

1.1 Logging into DevPlan

1 Select the DevPlan icon in the Program menu. The*Logon*dialog box appears.

2 Enter a valid user name and password in the User Name and Password controls.

Tip:Users who do not have a user name and password can login with the built-in sample user that TechExcel offers:

User Name: terry-j

Password: terry-j

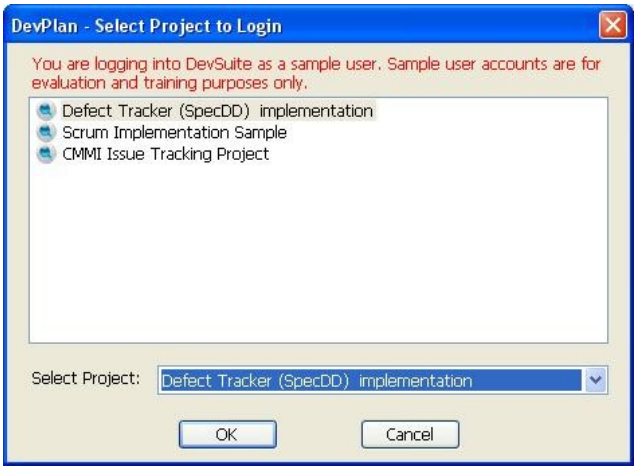
3To select a web service, select an option from the Web Service dropdown list. Click the ellipses button (…) to define a new web service connection.

Note: Additional controls such as Language and LDAP server would also be displayed in the Log On dialog box if these features are turned on by the system administrator:

Language:To choose the language used in DevSpec client, select an option from the Language dropdown list.

LDAP Server**:**To connect to the LDAP server to authenticate logins, select an option from the LDAP Server dropdown list.

4 Click the OK button. The Select Project to Login dialog box appears.



5 Select a DevPlan project in the Select Project dropdown list. The Project list displays all of the project available to the user through the selected web service.

6 Click the OK button. The selected project opens in the DevPlan client.

1.2 Exiting DevPlan

To exit DevPlan, select the*Exit*command in the File menu.

1.3 Switching between DevPlan Projects

The Switch Project command enables project members to switch between DevPlan projects without logging out of the current project and into another project.

To switch between DevPlan projects:

1 Select the Switch Project command in the File menu.

2 Select a project in the shortcut menu.

3 The selected project opens in the DevPlan client.

1.4 Logging into DevPlan as a Different User

To re-log onto DevPlan as a different user:

1 Select the Login command. Project managers may access the Login command by two methods:

Select the Login command in the File menu.
Press the CTRL + L keyboard shortcut.

The Login dialog box appears.

2 Enter a different set of user name and password. Select a different web service connection if needed.

3 Click the OK button. The *Select Project to Login* dialog box appears.

4 Select a DevPlan project.

2 Understanding the DevPlan User Client Interface

Every DevTrack development project is represented in the DevPlan client by a workspace that provides project members with the tools they need to manage and track development issues and events. Project data is organized and managed in three views: the planning view, the report view, and the knowledge view.

Each view displays tools and controls that enable the user to process the work items managed in that view. The workspace of each view is organized into panels (the tree panel, the chart panel, and the detail panel) and bars (the menu bar, tool bar, and status bar).

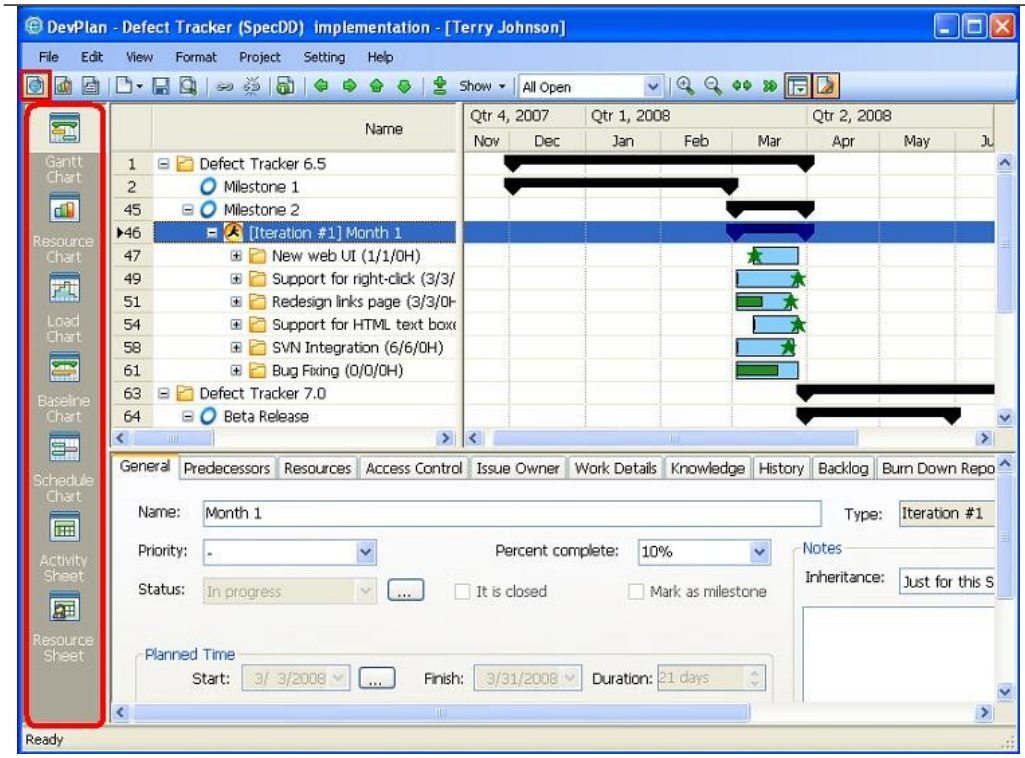
2.1 Views

Every DevTrack project is represented in the DevPlan client by a customized graphical user interface (GUI) that provides project manager with the tools that they need to plan and manage product deliverables.

The DevPlan client may display three different views: the project view, the report view, and the Knowledge view.

Project View (Planning View): The planning view enables project managers to create and manage subprojects, track the progress of project activities, and manage project resources.

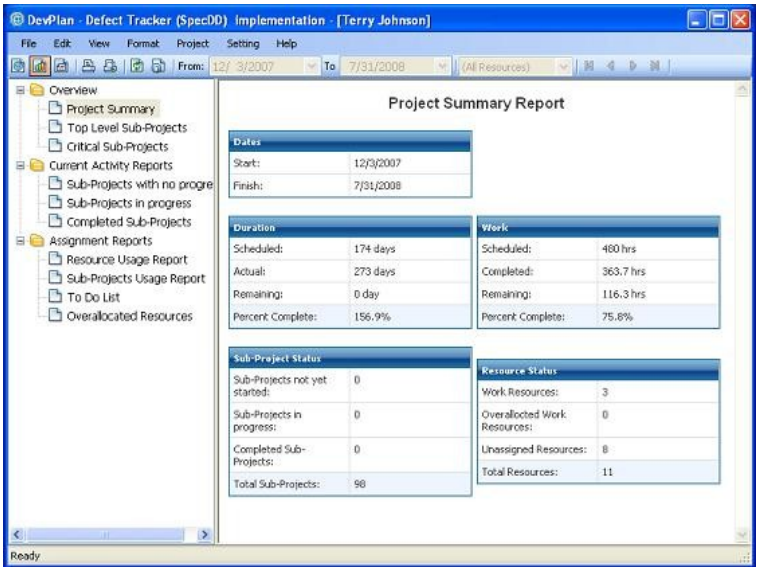
The Project/Planning View is the default view in the DevPlan client and is immediately displayed when the user logs into DevPlan and selects a project. The default chart in the planning view, the Gantt Chart, provides managers with a high-level description of the status of the subprojects in a DevTrack development project as well as the milestones and dependencies in those projects.



In the planning view, project managers may also access other charts or sheets: the Gantt Chart, Resource Chart, Load Chart, Baseline Chart, Schedule Chart, Activity Sheet, and Resource Sheet.

Report View :The report view enables project managers to define and manage reports and business intelligence.

The DevPlan report view provides project managers with a centralized reporting interface for managing all project reports and business intelligence. Using point-and-click tools, project managers may define customized reports that enable them to quickly and accurately asses the value of an activity in relation to the overall project. The report view consists of two areas: the Report tree window and the Report window.



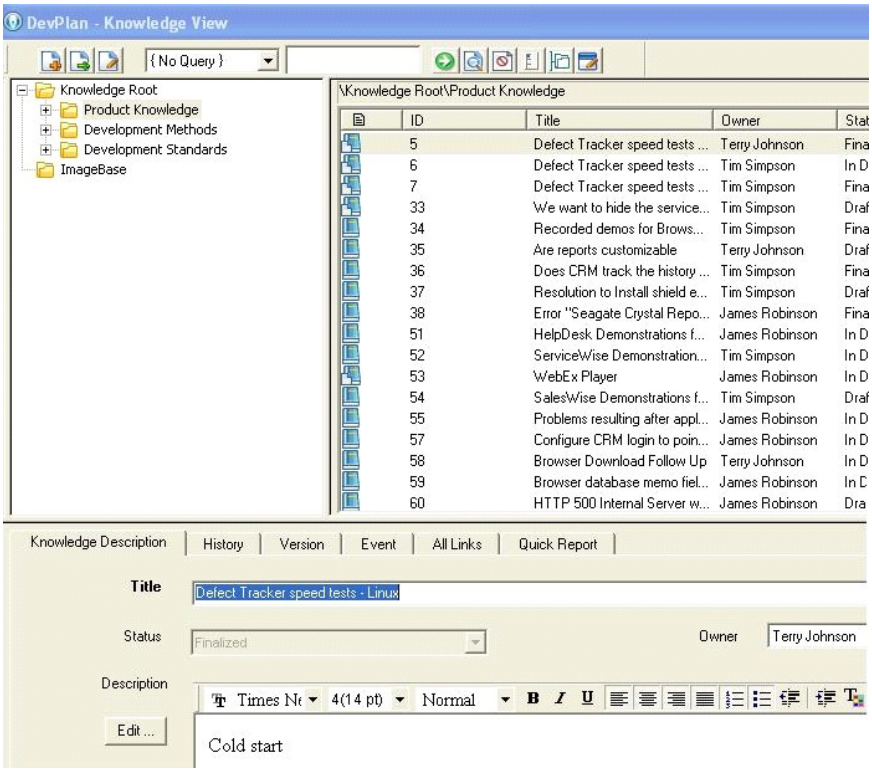
The report view consists of ten reports: the Project Summary report, Top-level Subprojects report, Critical Subprojects report, Subprojects with no Progress report, Subprojects in Progress report, Completed Subprojects report, Resource Usage report, Subprojects Usage report, To Do List report, and the Over Allocated Resource report.

Knowledge View: The knowledge view enables users to manage and share information across DevPlan, DevTrack, DevTest, and DevSpec

implementations.

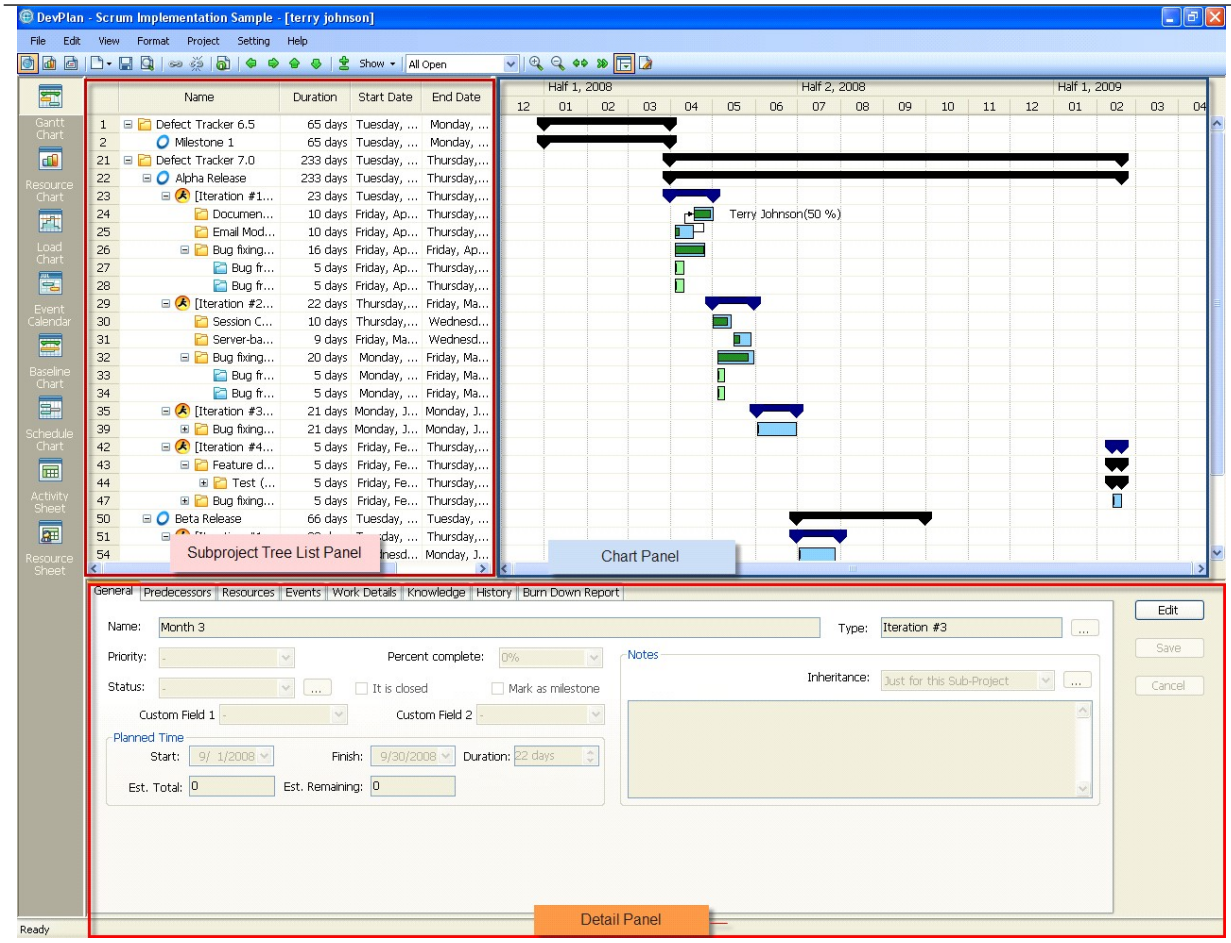
In DevPlan, all control documents, business requirements, functional specifications, technical specifications, database schemas, and GUI design documents are stored and managed in an integrated KnowledgeWise knowledge base.

The TechExcel KnowledgeWise distribution engine enables development organizations to enforce change management, security, and transparency to project deliverables and facilitates collaboration for distributed development teams.



2.2 Panels

The workspace in each view is organized into three tiled panels: the tree panel, the chart panel, and the detail panel.



Tree List Panel

The subproject tree list panel provides project managers with a visual representation of the relationship between all of the subprojects managed in a DevPlan project as well as the high- level information about each of these subprojects.

Chart Panel

The chart panel in the DevPlan planning view displays subproject and resource data in seven formats: the Gantt Chart, the Event Calendar, the Baseline Chart, the Schedule Chart, the Load Chart, the Activity Sheet, and the Resource Sheet. Each chart provides project managers with a tool for visualizing and understanding the progress, interdependencies, and constraints of subprojects.

Detail Panel

The subproject detail panel displays detailed about a single subproject in nine tabbed pages. The subproject detail panel may be displayed or hidden in the bottom third of the planning view. Use the*Show/Hide embed sub-project properties*button to display or hide the detail panel.

2.3 Bars

DevPlan client bars enables users to manage and plan the work items displayed in the view where the user is currently situated.

Every view in DevPlan can display up to three tool bars: the menu bar, the tool bar and the chart bar.

Menu Bar

The menu bar organizes DevPlan commands into seven different menus: the File menu, Edit menu, View menu, Format menu, Project menu,

Settings menu, and Help menu. The commands displayed in the menu bar are frequently accessible by hot keys or using commands elsewhere in the application.

The menu bar displays seven different menus:

File Menu
New: creating a subproject as a child or as a sibling
Switch Project: switching between DevPlan projects
Login: Logging in again with different username
Save as baseline: saving current work as a baseline
Edit baseline: editing existing baselines
Compare baseline with current: selecting a baseline and comparing it with the current work
Compare any two baseline: comparing any of the two baselines previously saved
Print: printing DevPlan subproject work
Exit: Exiting DevPlan
Edit Menu
Delete: deleting selected subproject
Move: moving selected subproject
Select All: selecting all subprojects
Find: launching the find window
Properties: bringing up the properties window of the selected subproject
View Menu
Gantt Chart: displaying Gantt Chart
Resource Chart: displaying Resource Chart
Load Chart: displaying Load Chart
Baseline Chart: displaying Baseline Chart
Schedule Chart: displaying Schedule Chart
Activity Sheet: displaying Activity Sheet
Resource Sheet: displaying Resource Sheet
Critical Path: displaying/hiding critical path
Show Grid: showing/hiding grid in the chart panel
Show Non Working Days: showing/hiding non working days
Show Selected Rows: highlighting the selected subproject in the chart panel
Zoom to Fit Whole Project: zooming in/out to display the whole project in the chart panel
Refresh Sub-Project List: refreshing the Sub-Project list panel
Format Menu
Styles: Selecting from thirteen kinds of panel styles
Dates: selecting date formats (short, medium or long)
Time Scale:
Project Menu
Reset Display Order: resetting the display order of subprojects
Customized Filter: bringing up the Ad-hoc search window
Outdent: outdenting the selected subproject in the list panel
Indent: indenting the selected subproject in the list panel
Move Up: moving the selected subproject up in the list panel
Move Down: moving the selected subproject down in the list panel
Expand: display all the child folders of the selected subproject in the list panel
Collapse: hiding all the child folders of the selected subproject in the list panel
Show: selecting the level of subprojects displayed in the list panel
Setting Menu
Column Settings: customizing columns displayed in the subproject tree panel
Critical Path: defining critical path settings
Help Menu
Check For Updates: checking if the DevPlan client application is up to date
About: viewing the DevPlan client version and build info

Tool Bar

The tool bar contains buttons and controls that enable project managers to execute common tasks such as managing or filtering subprojects. The command buttons displayed in the tool bar depend on the view and the chart. Below is a list of commonly used tool bar buttons:


Planning view:displaying the planning view in the DevPlan workspace.


Report view:displaying the report view in the DevPlan workspace.

 Knowledge view:launching the knowledge view in a separate DevPlan window.

 New button:creating new subproject as either a child or a sibling of the highlighted subproject.

 Save button:saving DevPlan work

 Show/ hide embed subproject properties button:displaying or hiding the detail panel in the DevPlan workspace.

 Enable/cancel edit mode button: definingthe detail pages displayed in the detail panel as editable or read-only

For more usage on tool bar icons that deal with subproject management, please see Chapter 4 --*Subproject Management*.

Chart Bar

The chart bar is only available in the project view. It displays six command buttons representing DevPlan charts. Project managers may choose which chart to display in the chart panel. Each chart displays project information in different contexts and provides project members with tools for managing and interpreting the data.

 **Gantt Chart button:**The Gantt Chart is a time and activity chart that may be used to plan, manage, and control subproject durations and dependencies.

 **Event Calendar button**: The Event Calendar is a calendar that displays project management activities (subproject events) in daily, weekly, and monthly views.

 **Baseline Chart button:**The Baseline Chart is a time and activity chart that may be used to compare a baseline to the current project, or two baselines with one another.

 **Schedule Chart button:**The Schedule Chart displays the work schedule of project members over a user-defined time period.

 **Load Chart button**: The Load Chart displays the load assigned to individual resources as a percentage of their work schedule in a specified time period. Time is shown along the horizontal x-axis and the percentage of time allocated for a project member in the vertical y-axis.

 **Activity Sheet button:**The Activity Sheet provides high-level information about all subprojects in a tabular format. The columns displayed in the Activity Sheet are customizable.

 **Resource Sheet button:**The Resource Sheet shows how particular resources or groups of resources (account types) are used in a project.

2.4 Understanding Keyboard Shortcuts

Keyboard shortcuts are a combination of keystrokes that perform a predefined function. Many keyboard shortcuts consist of a modifier key and a hot key. Many of the system-level DevPlan commands that are available in the menu bar and the tool bar are also accessible through keyboard shortcuts:

Shortcut key	Command
CTRL + L	Login command
CTRL+ I	Import command
CTRL + E	Export command
CTRL + P	Print command
SHIFT + DELETE	Delete command
CTRL + A	Select All command
CTRL+ F	Find command
F5	Refresh Subproject List
CTRL +1	Gantt Chart
CTRL +2	Resource Chart
CTRL +3	Load Chart
CTRL +4	Event Calendar
CTRL +5	Baseline Chart
CTRL +6	Schedule Chart
CTRL +7	Activity Sheet
CTRL +8	Resource Sheet

3 Understanding Client Personalization

DevPlan enables project members to customize the look-and-feel of their personal client to suit their personal preferences. Client personalization options include:

- Gantt chart styles
- Gantt bar styles
- Gantt bar customization
- Sub-project column customization

3.1 Selecting Gantt Chart Styles

In DevPlan, the Gantt chart displayed in the Gantt Chart view provides managers with a high-level description of the status of the subprojects in a DevTrack development project and the milestones and dependencies in those projects.

The Styles submenu displays 12 different options for customizing the style of Gantt charts. Options include: the Default, Professional 1, Professional 2, Professional 3, Professional 4, Classic, Simple, Colorful 1, Colorful 2, Colorful 3, Colorful 4, 256 Color 1, and 256 Color 2 Gantt chart styles.

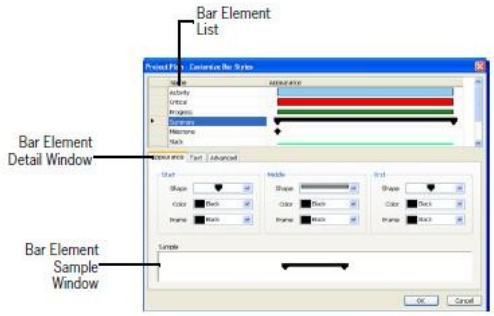
3.2 Selecting Standard Gantt Chart Bar Styles

Project members may customize the appearance of the bars displayed in DevPlan Gantt charts using the Bar Style manager.

Project managers may choose between eight different Gantt chart bar styles including: the Default, Standard Style 1, Standard Style 2, Standard Style 3, Standard Style 4, Standard Style 5, Standard Style 6, and Standard Style 7 bar styles.

3.2.1 Managing Custom Bar Styles

Project members may customize the appearance of the Gantt bars in DevPlan Gantt charts using the Customize Bar Style manager.



The Customize Bar Style manager is composed of three primary windows: the Bar Element list window, the Bar Element detail window, and the Bar Element sample window.

- The Bar Element list window displays the eight Gantt chart bar elements and displays the appearance of each element prior to user-defined customizations.
- The Bar Element detail window displays three tabbed windows: the Appearance tab, the Text tab, and the Advanced tab. Each tab in the Bar Element detail window displays tools that enable the project member to customize the style of the bar element selected in the Bar Element list window.
- The Bar Element sample window displays the appearance the selected bar element after user-defined customizations.

The appearance of a bar is expressed by a combination of style and color for eight different aspects of Gantt chart bars:

activity bar: An activity bar represents the duration of a child subproject.

critical path bar: A critical path bar is superimposed over an activity bar to represent the percentage of the activity that is complete.

progress bar:A progress bar is superimposed over an activity bar to represent the percentage of the activity that is complete.

summary bar:A summary bar represents a parent subproject.

milestone icon: The milestone icon represents a project milestone. A milestone is a point in time representing an important intermediate event such as the completion of a key phase or deliverable.

slack bars:

estimate normal icon: The Estimate Normal Icon is superimposed over the end of activity bars, summary bars, and milestone icons to indicate that the activity is on schedule.

estimate delay icon: The Estimate Delay Icon is superimposed over the end of activity bars, summary bars, and milestone icons to indicate that the activity is delayed.

estimate child delay icon: The Estimate Child Delay Icon is superimposed over the end of summary bars to indicate that the parent subproject is delayed because of delays in one or more child subprojects.

3.2.2 Customizing the Appearance of Gantt Bars

Project members may customize the appearance and text of Gantt bars in the Customize Bar Style manager.

The Appearance tab enables project members to customize the start, middle, and end of Gantt chart bar elements.

Figure 11-2: Customize Bar Manager Detail

Project managers may define the shape, body, and frame of the start, middle, and end of each bar element.

- The shape of a bar element is

- The body of a bar element is the color of that element.
- The frame of a bar element is the color of that element.

To customize the appearance of a Gantt bar:

1 Select the Styles > Bar Styles > Customize in the Format menu of the menu bar.

2 The Customize Bar Style manager appears.

3 Select a bar element in the Customize Bar Style manager.

The Customize Bar Style manager displays eight different bar elements:

- Activity
- Critical
- Progress
- Summary
- Milestone
- Slack
- EstimateNormal
- Estimate Delay
- Estimate Child Delay

4 Select the Appearance tab.

5 Define the shape, color, and frame of the start of the selected bar element.

6 Define the shape, color, and frame of the middle of the selected bar element.

7 Define the shape, color, and frame of the end of the selected bar element.

Chapter 4- Sub-Project Management

This chapter describes how development organizations may use subprojects to organize, prioritize, and schedule development issues.

In this chapter:

• Understanding DevTrack Subproject Management
• Managing Regular Subprojects
• Managing Subproject Schedules
• Managing Subproject Knowledge
• Managing Subproject Release Management

1 Understanding Sub-project Management

In DevSuite, a subproject is a logical grouping of issues within a development project that enables project team members to schedule, prioritize, and track a subset of issues separately from other issues in the project.

All subprojects are tools for organizing and managing development issues. Business and workflow rules defined at the subproject-level control the management and tracking of the development issues assigned to that subproject. A subproject may be defined by its subproject type (regular, iteration, iteration group, and product defect), in addition to multiple specifications.

Iterative Development Management: Iterative development subprojects organize development tasks into distinct areas of development and enable development organizations to manage, schedule, and track the development tasks that define a project milestone such as the completion of a version or build of a product.

Release Management: A “release subproject” is any subproject that is used to managed and track a specific release of a product under development. Release subprojects enable project team members to organize and manage the development issues and branch issues related to a specific release.

Requirements Management: A subproject may be defined by one or more *specifications* which define the conceptual product to be implemented in a subproject and the development issues managed within that subproject.

Support for iterative development, release management, and requirements management are optional features that must be enabled on a project-by-project basis. Subproject management tasks include the creation and definition of subprojects, the organization of subprojects in the subproject hierarchy, the management and tracking of subproject teams, schedules, and knowledge.

If DevSuite iterative development management, release management, and requirements management are supported in the project, subproject management include tasks related to these areas as well. Topics relating to development issues and iterative development, release management, and requirements management are covered separately in this guide.

Note: Subprojects may be managed, tracked and defined using tools in the DevTrack clients or the DevPlan smart client. If DevPlan support is enabled in a project, all subproject management tasks are completed in the DevPlan client.

1.1 Understanding Subproject Management Privileges

In DevTrack, a privilege is a right to perform a task that is granted to project members based on their account type. Subproject management privileges determine which project team members may manage subprojects in a development project.

Can create Subproject The privilege enables the user to add a subproject to the development project.

Can edit Subproject properties The privilege enables the user to edit subproject properties.

Can delete Subproject The privilege enables the user to delete a subproject.

Can associate specifications with Subproject The privilege enables the user to associate a specification to a subproject as a primary specification.

Can change Subproject The privilege enables the user to reassign a development issue to a different subproject.

Can link/unlink product, version, build and define build's properties The privilege enables the user to link a subproject to a product, version, or build.

2 Managing Regular Subprojects

A regular subproject is logical grouping of issues within a DevTrack project that enable development organizations to schedule, prioritize, and track those issues separately from other issues in the project.

Using regular subprojects, development organizations may organize issues by development groups, issue priorities, components, delivery dates, or any other category that makes sense to the business.

Regular subprojects are not tied to iterative development structures. However, development organizations may create regular subprojects to organize issues into other logical groups (for example, development teams, components, or priority) within iterative development folders.

2.1 Adding Subprojects

Regular subprojects organize development issues into smaller, more meaningful categories and enable development organizations to manage those issues independently of other issues. All subprojects are created within a hierarchical tree structure that defines the relationships between subprojects. Each subproject is the child of a parent subproject and may be the parent of many child subprojects.

To create a subproject, project members must belong to an account type that has been granted the appropriate privileges by the project administrator.

To add a regular subproject:

1 Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command.

The Subproject Information window appears. The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2 Define general subproject properties in the General page. General subproject properties include:

Title Status Priority

3 Define the planned time of the subproject. Subproject planned time date properties include:

Start Date Finish Date Duration

4 Optional: To define subproject inheritance rules, select an option from the Inheritance dropdown list. The Inheritance dropdown list displays two options: Just for this Subproject and the Enforce for all Child Subprojects options.:

Just for this Subproject Enforce for all Child Subprojects

5 Optional: To define subproject notes, enter a brief note in the Note text field control.

6 Click the OK button.

2.2 Updating Subproject Properties

Subprojects are a tool or organizing the development issues into smaller more meaningful categories. All subprojects are created within a hierarchical tree structure that defines the relationships between subprojects. Each subproject is the child of a parent subproject and may be the parent of many child subprojects.

To edit subprojects (Windows Client):

1 Right-click a product subfolder in the Subproject tree list window and select the Edit command in the shortcut menu. The Subproject manager appears.

2 Update general subproject properties in the General tab.

3 Update subproject child fields in the Subproject Child Fields tab.

4 Click the OK button.

2.3 Closing Subprojects

Project members may close a subproject by selecting the It Is Closed option in the Subproject dialog box or by selecting the Close command in the Issue tree shortcut menu. Project members typically close subprojects once the subprojects due date has passed and the custom development work, product, or release has been delivered.

A closed subproject is a subproject that has been closed by a project member.

- No issues may be added to a subproject once that subproject is closed.
- A subproject may be closed only if there are no open issues associated with that subproject.

Closed subprojects are not displayed in the issue tree panel by default. Project members may display or hide close subproject folders by selecting the Show Closed Project command in the Tree window shortcut menu. For step-by-step instructions see “Displaying or Hiding Closed Projects”

To close a subproject:

1 Right-click in the issue tree panel. The Subproject dialog box appears.

2 Select the date that the subproject was completed in the Delivery Date control.

3 Select the It Is Closed check box.

4 Click the OK button. The Subproject dialog box closes.

1 command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command. The Subproject Information window appears. The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2 Click the Type ellipsis button in the General page. The Choose Iteration Type window appears.

3 Select an iteration type option: DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy

- To define a regular subproject, select the Regular Subproject option button.
- To define an iteration group subproject, select the Iteration Group Subproject option button.
- To define an iteration subproject, select the Iteration Subproject option button.
- To define a defect tracking subproject, select the Defect Tracking Subproject option button.

4 Optional: If the subproject is an iteration group or iteration subproject, select an issue template in the Issue Template dropdown list. The Issue Template dropdown list displays the issue templates that are applicable to the subproject.

5 Optional: If the subproject is an iteration subproject, select an iteration template in the Iteration Template dropdown list.

6 Select the OK button. The Choose Iteration Type window closes.

2.4 Displaying or Hiding Closed Projects

Project members may use the Show Closed Project command in the Subproject shortcut menu to display or hide closed subproject folders in the issue tree panel. By default closed subproject folders are not displayed in the issue tree panel.

To display closed projects:

1 Right-click the Project Issues folder The Issue Tree shortcut menu appears.

2 Select the Show Closed Projects command. A black check mark appears next to the title of the command.

To hide closed projects:

1 Right-click the Project Issues folder The Issue Tree shortcut menu appears.

2 Select the Show Closed Projects command. No check mark appears next to the title of the command.

2.5 Defining Subproject Statuses

The Subproject Status control tracks the progress made on the development project managed within that subproject. Subproject statuses may be defined manually by selecting an administrator-defined option from the Status dropdown list or may be defined automatically based on administrator-defined rules. Four different methods may be used to determine the progress status of a subproject.

• Independent of its Incidents
• Derived from the lowest-ranked incident status
• Derived from the highest-ranked incident status
• Linked to Incident Status Definition

The Status dropdown list control is editable only if the Independent of its Incidents option is enabled in the DevTrack project.

2.6 Defining Subproject Priorities

The priority of a subproject may be defined manually by selecting an administrator-defined option from the Priority dropdown list or it may be defined automatically based on the priority of the issues belonging to that subproject. Subproject priorities may be defined manually by selecting an administrator-defined option from the Priority dropdown list or may be defined automatically based on administrator-defined rules. Four different methods may be used to determine the progress status of a subproject.

• Independent of its Incidents
• Derived from the lowest-ranked incident status
• Derived from the highest -ranked incident status
• Linked to Incident Priority Definition

The Priority dropdown list control is editable only if the Independent of its Incidents option is enabled in the DevTrack project.

2.7 Deleting Subprojects

A project member must belong to an account type that has been granted the appropriate privileges to delete a subproject.

To delete product subprojects:

1 Right-click a product subfolder in the Subproject tree list window and select the Delete command in the shortcut menu. A DevTrack dialog box appears.

2 Click the OK button.

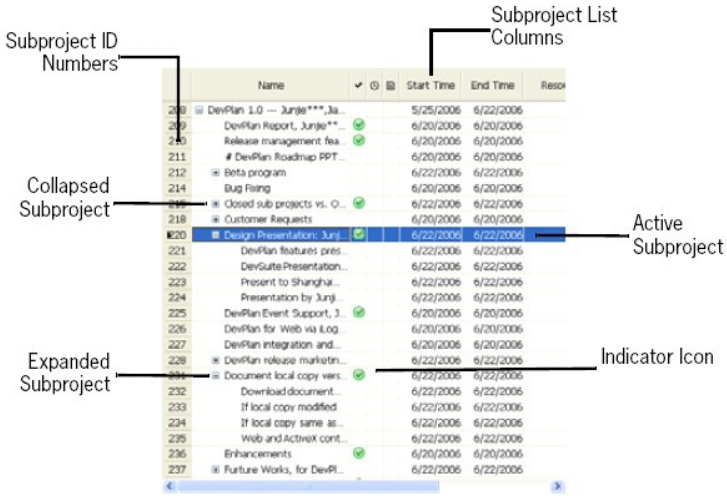
2.8 Placing Subprojects in the Issue Tree Panel

The issue tree panel displays subproject folders and personal folders belonging to individual project members or their team members.

The My Personal Folder and Team Member’s Folder are not contained in the Project Issues folder. Personal folders are displayed above or below the Project Issues folder in the issue tree panel depending on user preference settings. For more information see “Managing Personal Folder Preferences”

3 Outlining and Organizing Sub-projects

The Subproject tree list panel enables project manager to view high-level information about every subproject in the DevPlan project and to organize these subprojects into a hierarchy that defines their relationships.



The subproject list displays high-level data about subprojects in a tabular format. Every column represents a subproject property. Every row represents a subproject.

The tree structure represents the hierarchy of subprojects and indicates the relationships between subprojects by their vertical and horizontal position relative to other subprojects.

Project managers may organize subprojects by moving them up or down in the Subproject tree list or define parent-child relationships between subprojects by indenting or outdenting them in tree list.

Note: Child subprojects are always displayed beneath their parent and indented to the right.

The relative position of a subproject and its relationship to the subproject around it in the Subproject tree list panel is indicated*vertically*and*horizontally*.

- The vertical position of a subproject may determine its relationship with the subprojects that immediately precede or follow it in the Subproject tree list.
- The horizontal position of a subproject indicatesitsrelationship between the subprojects based on their outline level in the subproject hierarchy.

3.1 Viewing Subproject Data in the Subproject Tree List

The Subproject tree list panel provides managers with high-level informationaboutsubprojects in a tabular list. Each column represents a subproject property. Each row represents an individual subproject and displays the subproject property value for the subproject property column.

The Subproject tree list panel may display up to 29 unique subproject properties and any number of subprojects.

Note: Two subproject properties—the*Name*andthe*Duration*columns–are mandatory and must be displayed in the Subproject tree list. All other subproject properties are optional.

Indicator icons

Indicator iconsare graphical icons that may be added to the Subproject tree list to provide project managers with a visual clue that enable them to judge the current progress of a subproject in a glance.

The Subproject tree list may display five different indicator icons: the*Complete*icon, the*Event*icon, the*Note*icon, the*Knowledge*icon, and the*Type*icon.

	The Complete Icon indicates that a subproject is 100% complete.
	The Event Icon indicates that there is an open event in the subproject or one of its child subprojects.
	The Note Icon indicates that the subproject or one of its child subprojects has a note.
	The Knowledge Icon indicates that there is a knowledge item linked to the subproject or one of its child subprojects.
	The Type Icon indicates the subproject type. Each subproject is identified by a color-coded folder that indicates the level of that subproject in the product hierarchy: product (green), version (orange), gray (build), and green (normal).

Project managers may customize the Subproject tree list panel to display the information that is most important to them and define the order that the columns are displayed in the DevPlan GUI. For more information on customizing the Subproject tree list panel,see “Managing Subproject Column Settings.”

3.1.1 Understanding Subproject ID Numbers

Subproject ID numbersare displayed in the far left column of the Subproject tree list panel and indicate the relative position in the subproject hierarchy. The subproject ID numbers of subprojects displayed in the Subproject tree list change whenever a subproject is added or removed from the subproject hierarchy. DevPlanwillautomatically update the subproject ID number associated with each subproject to reflect the current structure of the project hierarchy.

All links and dependencies between projects are maintained despite the change in subproject ID numbers. Project managers may define a dependency relationship between two subprojects by entering the outline number of the successor subproject in the ID column of the Predecessors tab. For more information seeChapter 4 –*Understanding Dependency Relationships.*

3.2 Organizing Subprojects in the Subproject Tree List

Project managers may organize development projects by positioning subprojects in the Subproject tree list panel to create the parent-child relationships that form the project hierarchy.

The Subproject tree list panel enables project managers to organize and structure development projects and every subproject within that project by creating*parent and child relationships*between the subprojects tracked in DevPlan.Subproject types include:

Parent Subproject: Parent subprojects are summary subprojects that group together one or more subprojects. Project managers may use parent subprojects to group together related activities, manage the various different functional areas under development, or represent the various phases and sub-phases in the project. Parent subprojects are always displayed above their children and outdented to the left.

Child Subproject: Child subprojects are the children of a parent subproject and may inherit subproject properties from their parent. Child subprojects are at an outline level that is one greater than its parent, and are always positioned beneath their parent subproject and indented to the right.

Sibling Subproject: Sibling subprojects are projects that share the same parent subproject. Sibling subprojects may be controlled by the same rules. Sibling subprojects are always on the same outline level as their siblings.

Tip:Every parent subproject may be the child of another subproject, and every child subproject may be the parent of one or more of its own child subprojects. Managers may create as many levels of parent-child relationships as are needed to represent the organization of the project.

3.2.1 Displaying/ Hiding Child Subprojects

Parent subprojects may be indicated in the Subproject tree list panel by the Expand and Collapse outline icons. Outline icons enable project managers to quickly see if a subproject is the parent of one or more subprojects.

 • Collapsed parent subprojects are identified by a plus symbol, the Expand icon. If the Expand outline icon is displayed next to a parent subproject, the child subprojects are hidden in the Subproject tree list panel. Managers may click the Expand outline symbol to expand the subproject tree list and display the child subprojects.

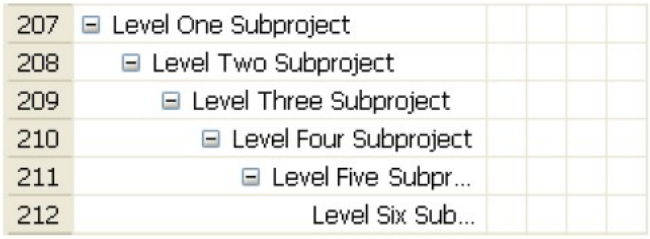
 • Expanded parent subprojects are identified by a minus symbol, the Collapse icon. If the Collapse outline symbol is displayed next to a parent subproject, the child subprojects are displayed in the Subproject tree list panel. Managers may click the Collapse outline symbol to close the subproject tree list and hide the child subprojects.

Outline icons are not displayed next to child or sibling subprojects. Outline symbols maybe displayed or hidden in the tree list panel. For more information,see “Showing or Hiding Outline Symbols”

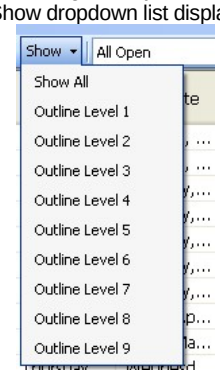
3.2.2 Displaying Subproject Outline Levels

Outline levelsindicate the depth of a subproject in the subproject hierarchy. Every parent-child relationship creates an outline level. Level one of the project hierarchy represents the very top level in the project. The children of this level are considered to be level two in the project hierarchy; the child of the Level Two project is at level three in the project hierarchy and so on throughout the project.

- The further a subproject is outdented in the subproject hierarchy, the lower its outline level.
- The further a subproject is indented in the subproject hierarchy, the higher its outline level.



Project managers may use the Show dropdown list in the tool bar to quickly display and hide different outline levels in the Subproject tree list panel. The Show dropdown list displays ten options: the Show All command and a command for the first nine outline levels of the project hierarchy.



Selecting an outline level from the dropdown list expands all subprojects above that level in the project hierarchy and collapses subprojects beneath that outline level. For example, selecting the Outline Level 3 option displays outline levels one, two, and three, but hides levels four, five, and six.

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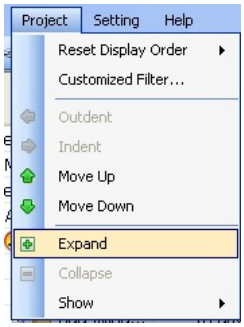
3.2.3 Expanding Subprojects

Project managers may view the structure of the subproject hierarchy by collapsing and expanding the Subproject tree list or by displaying or hiding subproject outline levels.

To expand subprojects:
1Select a collapsed parent subproject in the Subproject tree list panel of the Gantt Chart view. If a parent subproject is collapsed, the child subprojects of that parent are not displayed in the Subproject tree list panel.

2Select the Expand command. Managers may access the Expand command by three methods:
- Click the Expand/Collapse icon in the tool bar.
- Select the Expand command in the Project menu.



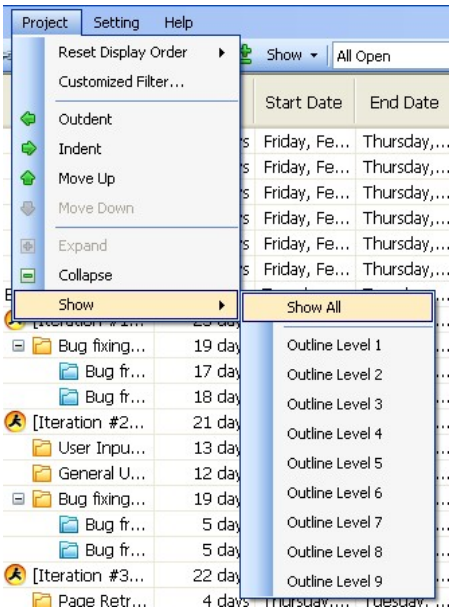
- Right-click in the Subproject tree list and select the Expand command in the shortcut menu.

Thehighlightedparent subproject is expanded and its child subprojects are displayed in the Subproject tree list panel.

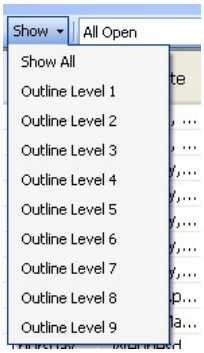
3.2.4 Expanding All Subprojects

To expand all subprojects, select the*Expand All*or*Show All*commandsin the Gantt chart view.

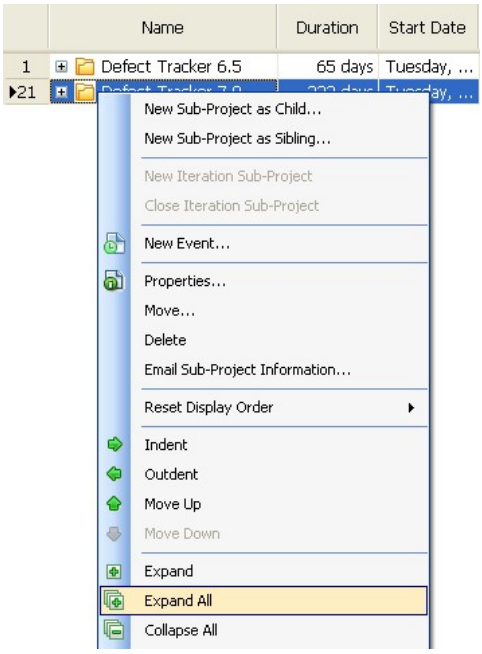
Project managers may access the*Expand All*or*Show All*commandsby:
• Selectingthe*Show*>*ShowAll*command in the Project menu.



• Selecting*Show All*in the*Show*dropdown listin thetool bar.



• Right-clickingin the Subproject tree list and select the Expand All command in the shortcut menu.



All parent subprojects are expanded to display all child subprojects in the Subproject tree list panel.

3.2.5 Collapsing Subprojects

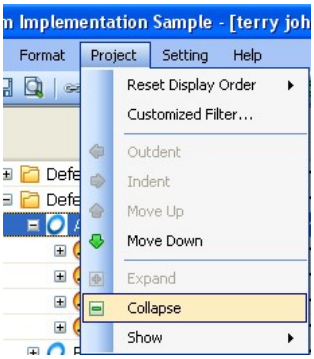
Collapsing a subproject hides all child subprojectsof the highlighted subprojectin the Subproject tree list. The subproject is displayed as a summary subproject represented in the Gantt chart by a summary bar.

To collapse subprojects:
1Select an expanded parent subproject in the Subproject tree list panel of theGanttchart view. If a parent subproject is expanded, the child subprojects of that parent are displayed beneath that subproject in the Subproject tree list panel.

2Select the*Collapse*command.Usersmay access the*Collapse*command by:

• Clickingthe Expand/Collapse icon in the tool bar.

• Selectingthe*Collapse*command in the Project menu.



• Right-click in the Subproject tree list and select the Collapse command in the shortcut menu.

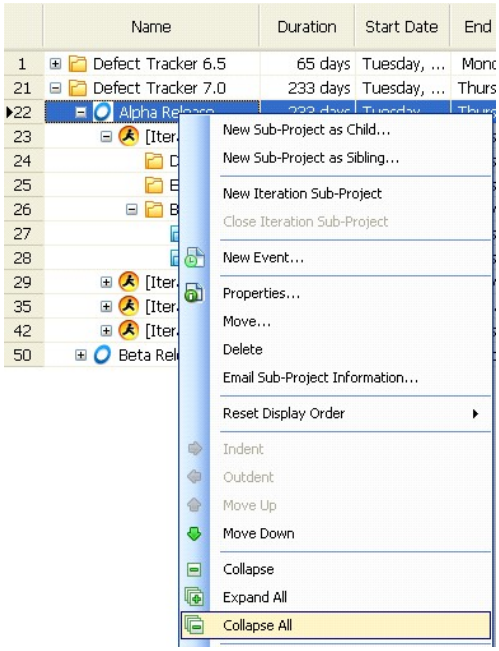
Thehighlightedparent subproject is collapsed and its child subprojects are not displayed in the Subproject tree list panel.

3.2.6 Collapsing All Subprojects

To collapse all subprojects, select the*Collapse All*command in the Gantt chart view.

Project managers may access the*Collapse All*command by:

• Right-clickingin the Subproject tree list and selectingthe*Collapse All*command in the shortcut menu.



All parent subprojects are collapsed so that only the top level of the subproject hierarchy (Outline Level 1) is displayed in the Subproject tree list panel.Same effect can be achieved by selecting*Outline Level 1*in the*Show*dropdown list in the tool bar.

3.2.7 Outdenting Subprojects

Project managers may define a subproject as the parent of the subproject that immediately follows it in the Subproject tree list by outdenting that subproject.

Outdenting a subproject automatically redefines the relationship between the active subproject and the subproject immediately preceding and following the subproject in the Subproject tree list panel.

• If the active subproject is the child of a parent subproject, outdenting the target subproject redefines the parent-child relationship as a sibling relationship.

• If the active subproject is the sibling of one or more subprojects, outdenting the target subprojects creates a parent-child relationship between the active subproject (now the parent) and its former siblings (the children).

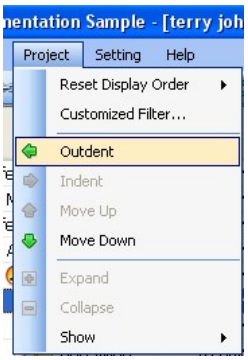
To outdent a subproject:

1Select a subproject in the Subproject tree list panel of the Ganttchart view.

2Select the*Outdent*command. Managers may access the*Outdent*command by:

• Click the Outdent icon in the tool bar.

• Select the Outdent command in the Project menu.



• Right-click in the Subproject tree list and select the*Outdent*command in the shortcut menu.

3.2.8 Indenting Subprojects

Project managers may define a subproject as the child of the subproject that immediately precedes it in the Subproject tree list by indenting that subproject.

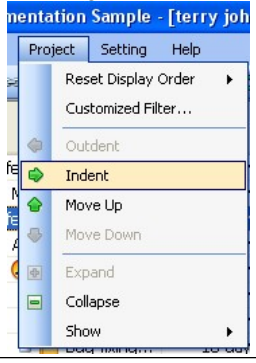
Indenting a subproject automatically redefines the relationship between the target subproject and the subproject immediately precedingitin the Subproject tree list panel.

If the active subproject is the sibling ofthesubprojectpreceding it,indenting the target subprojects creates a parent-child relationship between the active subproject (now thechild) and its former sibling (now the parent).

To indent a subproject:
1Select a subproject in the Subproject tree list panel of the Ganttchart view.

2Select the Indent command. Managers may access the Indent command by:
• Clickingthe Indent icon in the tool bar.

• Selectingthe*Indent*command in the Project menu.



• Right-click in the Subproject tree list and select the*Indent*command in the shortcut menu.

3.3 Repositioning subprojects

The relative position of subprojects in the Subproject tree list panel defines the relationship between the subproject and other subprojects in the DevPlan project.

Project managers may move subprojects up or down in the subproject tree list by three methods:

• Moving subprojects up or down using the*Move Up* / *Move Down* buttons in the tool bar.

• Moving subprojects up or down using the*Move Subproject manager.*

• Dragging and dropping subprojects in the Subproject tree list panel.

3.3.1 Rearranging Subproject order in the Subproject Tree List

DevPlan users may rearrange the order of subprojects in the subproject tree list panel by using the*Move Up*and*Move Down*commands.

To move subprojects up in the Subproject tree list:
1Select a subproject in the Subproject tree list panel of the Ganttchart view.
2Select the*Move Up*command. Managers may access the Move Up command by:

• Click the*Move Up*icon in the tool bar.

• Right-click in the Subproject tree list and select the*Move Up*command in the shortcut menu.

To move subprojects down in the Subproject tree list:
1Select a subproject in the Subproject tree list panel of the Ganttchart view.

2Select the*MoveDown*command. Managers may access the*Move Down*command by:

• Clickingthe*Move Down*icon in the tool bar.

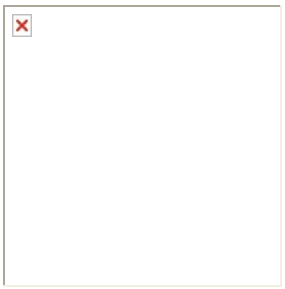
• Right-click in the Subproject tree list and select the*MoveDown*command in the shortcut menu.

3.3.2 Moving Subprojects in the Subproject Tree List

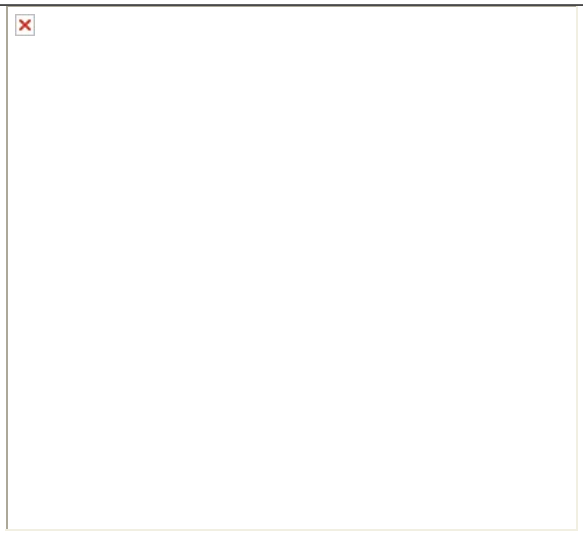
Project managers may move subprojects to any position in the subproject hierarchy using the Move Subproject manager. When moving a subproject, users may define the subproject as the child or sibling of another subproject.

To move subprojects:
1Select a subproject in the Subproject tree list panel of the Gantt chart view.

2Select the*Move*command. Users may access the*Move*command by two methods:
• Select the*Move*command in the*Edit*menu.



• Right-click in the Subproject tree list and select the*Move*command in the shortcut menu.



The*Move Subprojectwindow*appears.

3Select a subproject in the Subproject tree list control. The active subproject is moved immediately beneath the subproject selected in the Subproject tree list control. Users may click outline icons to expand or collapse parent subprojects.

4Define the relationship between the active subproject and the selected subproject.

• To define the active subproject as a child of the selected subproject, select the*As Child of Selected Subproject*radio button.

• To define the active subproject as a sibling of the selected subproject, select the*As Sibling of Selected Subproject*radio button.

5Click the OK button. The*Move Subprojectwindow*closes.

3.3.3 Dragging and Dropping Subprojects in the Subproject Tree List

To drag and drop subprojects:

1Select the Subproject ID of a subproject in Subproject tree list panel. The subproject ID column is to the far left of the Subproject tree list. The selected subproject is indicated by a black arrow.

2Hold the button down as the subproject is dragged to another position in the subproject tree list. A red line indicates the placement of the subproject.

3Release the button to place the subproject.

4 Managing Subproject Schedules

Project scheduling consists of defining dates and time lines for completion subproject tasks. Project managers may define a project schedule whenever they create or edit a subproject in the General tab of the Subproject page.

The General tab displays the five controls used to define subproject time lines: the start date, the finish date, the duration, the due date, and the delivery date

Start Date The Start Date identifies the beginning date for the work associated with the project. The start date defines the actual beginning of the subproject and is used to calculate the duration of the subproject and critical paths.

Finish Date The Finish Date identifies the ending date for the work associated with the project. The finish date defines the actual end of the subproject and is used to calculate the duration of the subproject and critical paths.

Due Date The Due Date is a milestone that represents the date that the subproject is due to be finished. Project managers may mandate that the due date of a parent subproject is inherited by one or more of its child subprojects.

Delivery Date The Delivery Date represents the date by which the end product of the subproject is delivered and is

used to calculate critical paths when a subproject is the predecessor of another subproject. Project managers may mandate that the delivery date of a parent subproject is inherited by one or more of its child subprojects.

4.1 Defining Subproject Start and End Dates

Every subproject has a distinct start and end date. The starting and ending dates of all subprojects are managed and tracked in the Start Date control and the End Date control of the Subproject manager.

- The start date identifies the beginning date for work associated with the subproject. The start date defines the actual beginning of the subproject and is used to calculate the duration of the subproject in DevPlan.
- The end date defines the actual end of the subproject and is used to calculate the duration of the subproject and critical paths in DevPlan.

To define the start date or end date of a subproject, select the Ellipsis button adjacent to the Time control and select the date from the Time control

4.2 Defining Subproject Due Dates

The due date is a milestone that represents the date that the subproject is due to be finished. Project manages may mandate that the due date of a parent subproject is inherited by one or more of its child subprojects. To define subproject due date inheritance rules, select an option from the due date Inheritance dropdown list control. The date Inheritance dropdown list displays two options:

- Just for this Subproject
- Enforced for all Children

4.3 Defining Subproject Delivery Dates

The delivery date is a milestone that represents the date that the subproject is due to be delivered. Project manages may mandate that the delivery date of a parent subproject is inherited by one or more of its child subprojects. To define subproject delivery date inheritance rules, select an option from the Note Inheritance dropdown list control.

The delivery date Inheritance dropdown list displays two options:

- Just for this Subproject
- Enforced for all Children

4.4 Understanding Subproject Time Inheritance

In DevTrack project members may define relationships between parent and child subprojects that enforce the inheritance of subproject settings for the Due Date, Delivery Date, and Notes properties. Project members may define three types of inheritance rules

- The Enforced by Parent rule creates a relationship between the parent subproject and its children by which parent subproject settings are inherited by the child subprojects.
- The Just for this Subproject rule does not create a relationship between the current subproject and its children. Subproject properties are not inherited.

• The Enforced for All Child Subprojects rule mandates that all child projects inherits subproject properties from the parent subproject. Inherited subproject definitions may not be overwritten in child subprojects.No inheritance relationships may be defined for the Start Date or Planned Date subproject properties.

To define subproject inheritance rules:

1 Select a subproject in the Subproject tree list window.

2 Select the General Settings tab in the Subproject detail window.

3 Select an option from the Inheritance dropdown list.

4 The Inheritance dropdown list displays two options

- Enforced by Parent
- Just for this Subproject

5 Managing Subproject Release Management

In DevTrack, the scope of the development activities managed and tracked each subproject may be controlled by linking a specific product and version to that subproject. Subprojects defined by product release management structures—products and versions—are deemed*release subprojects*. A release subproject is any subproject that is used to managed and track a specific release of a product under development. The subproject folder represents that release and is used to organize and manage the development issues and branch issues related to that release. Using controls in the Product/Version Information tab, project managers may track the products, versions, and version milestones that are applicable to subprojects.

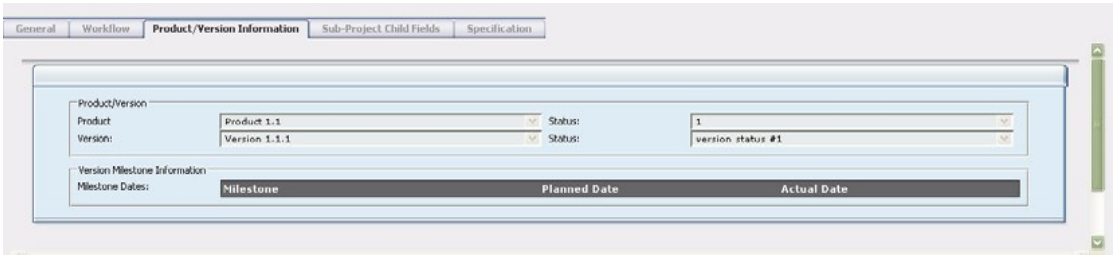


Figure 3-1: Product/Version Tab in the Subproject Detail Panel

Release subprojects play an important role in DevSuite product release management and branch management processes.

5.1 Release Management

DevSuite product release management structures define and organize the product releases—products, versions, and builds—under development in a DevSuite site and define a framework for controlling how these releases are designed and implemented. Every subproject in a DevTrack development project may be linked to a specific product and version.

5.2 Branch Management

Release subprojects are a prerequisite for multiple branch management. DevTrack multiple branch management is build upon subproject hierarchy of products, versions, and builds that organize and schedule development tasks within a project.

Every release of a product, version, or build that is managed in a DevTrack project may be associated with a subproject folder in the DevTrack client. Administer-defined branch action rules may limit the scope of applicable subprojects to subprojects assigned to the same product or version as the parent subproject of the development issue.

5.3 Defining Applicable Products and Versions

In DevTrack, each subproject may be defined by an applicable product and version and used to managed and track a specific release of a product under development. Subprojects defined by product release management structures—products and versions—are deemed*release subprojects*. The release subprojects represents a specific release and is used to organize and manage the development issues and branch issues related to that release. Release subprojects are a prerequisite for multiple branch management.

To define applicable product and version:

1 Select the Subproject Mode button in the subproject tree panel.

2 Select the General tab in the subproject detail panel.

3 Select a product in the Product dropdown list.

4 Select a version in the Version dropdown list.

5.4 Tracking Subproject Products and Versions

To track subproject product and version:

1 Select the Subproject Mode button in the subproject tree panel.

2 Select the Product/Version Information tab in the subproject detail panel.

5.5 Tracking Subproject Version Milestones

To track version milestones:

1 Select the Subproject Mode button in the subproject tree panel.

2 Select the Product/Version Information tab in the subproject detail panel.

6 Managing Iterative Development Subprojects

In DevSuite, subprojects enable development organizations to manage, schedule, and track iterations of development by organizing development tasks into distinct areas of development. Subprojects define the structure that is used to organize and manage the backlog.

In DevSuite, a subproject is a logical grouping of issues within a DevTrack development project that enables development teams to schedule, prioritize, and track those issues separately from other issues in the project. Each subproject has its own description, priority, status, and start and end dates that define how issues are managed as a group.

Moreover, issue access controls, applicable issue type rules, and workflow rules may be defined independently for each subproject. Subprojects are represented in the issue tree panel of the DevPlan clients as*subproject folders*organized in an hierarchical tree structure.

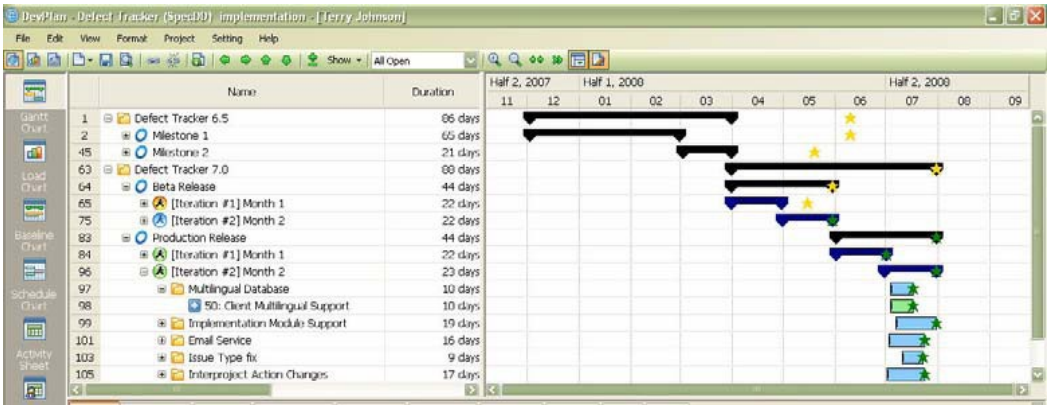


Figure 3-2: Subproject Tree Window

Subprojects are identified by subproject type in the subproject tree list panel:

A regular subproject is identified by a gold folder.

All iterative group subproject is identified in the subproject tree panel by the iterative group icon.

The yellow iterative subproject icon identifies a current iteration.

The green iterative subproject icon identifies a closed iteration.

The green iterative subproject icon identifies a future iteration.

A product defect subproject is identified by a blue folder.

The hierarchical structure of subprojects defines and represents the parent-child relationships between subprojects. Every user-defined subproject is the child of a parent subproject and may be the parent to one or more child subprojects. Subproject due dates, delivery dates, and notes may be inherited by child subprojects from their parent subproject.

6.1 Subproject Types and Iterative Development

In DevSuite, subprojects enable development organizations to manage, schedule, and track iterations of development by organizing development tasks into distinct areas of development. DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy.

Iterative Group Subproject (Milestone) An iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product.

Iterative Subproject (Sprint) An iterative subproject is a tool for organizing, managing, and tracking a set of implementation tasks within a set time period. The iterative subproject defines the tasks that must be completed to meet the goals of an iteration.

Regular SubprojectsA regular subproject defines a distinct area of work within a project. Regular subprojects may be used to organize the work within an iterative subproject or within the project itself.

The hierarchical structure shows the relationships between groups of issues and defines how those issues are managed. Project members may filter, search for, and run reports on development issues based on their subproject. Development organizations may use any taxonomy to organize development issues.

6.2 Defining Subproject Types

Using controls in the Choose Iteration Type window, project team members may define the subproject type of every subproject defined in the DevPlan client.

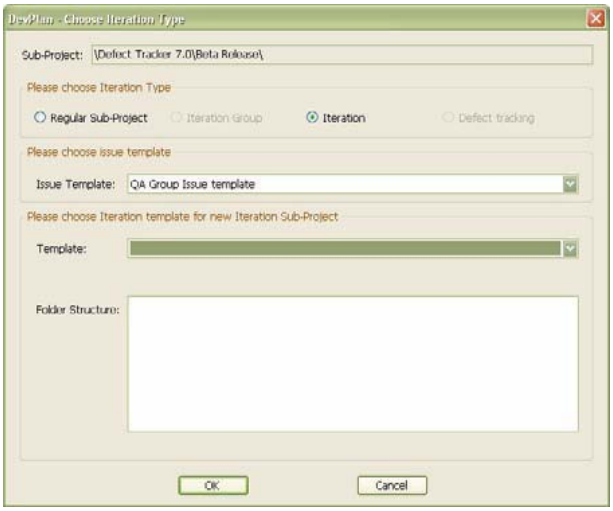


Figure 3-3: Choose Iteration Type Window

DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy.

Iterative Group Subproject (Milestone) An iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product.

Iterative Subproject (Sprint) An iterative subproject is a tool for organizing, managing, and tracking a set of implementation tasks within a set time period. The iterative subproject defines the tasks that must be completed to meet the goals of an iteration.

Regular SubprojectsA regular subproject defines a distinct area of work within a project. Regular subprojects may be used to organize the work within an iterative subproject or within the project itself.

1Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command. The Subproject Information window appears. The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2Click the Type ellipsis button in the General page. The Choose Iteration Type window appears.

3 Select an iteration type option:

DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy

- To define a regular subproject, select the Regular Subproject option button.
- To define an iteration group subproject, select the Iteration Group Subproject option button.
- To define an iteration subproject, select the Iteration Subproject option button.
- To define a defect tracking subproject, select the Defect Tracking Subproject option button.

4 Optional: If the subproject is an iteration group or iteration subproject, select an issue template in the Issue Template dropdown list. The Issue Template dropdown list displays the issue templates that are applicable to the subproject.

5 Optional: If the subproject is an iteration subproject, select an iteration template in the Iteration Template dropdown list.

6 Select the OK button. The Choose Iteration Type window closes.

6.3 Managing Iterative Group (Milestone) Subprojects

In DevSuite, an iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product. The iterative group subproject defines the tasks that must be completed to meet achieve a particular milestone. Every iterative group subproject is the parent of one or more child iterative subprojects. The tasks that comprise a iterative subproject are a subset of the tasks that define the parent iterative group subproject. The status of iterative subprojects are indicated in the subproject tree list panel by one of three different iterative subproject icons:

All iterative group subprojects are identified in the subproject tree panel by the iterative group icon.

To add an iterative subproject:

1 Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command. The Subproject Information window appears.

The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2 Define general subproject properties in the General page.

3 Define the planned time of the subproject. Subproject planned time date properties include:

Start Date Finish Date Duration

4 Optional: To define subproject inheritance rules, select an option from the Inheritance dropdown list. The Inheritance dropdown list displays two options: Just for this Subproject and the Enforce for all Child Subprojects options.:

Just for this Subproject Enforce for all Child Subprojects

Chapter 5- Using Gantt Chart in Project View

In this chapter:

- Understanding Project Tracking
- Working in the DevPlan Gantt Chart
- Managing Dependency Relationships
- Identifying Critical Paths
- Managing Baselines

1 Understanding Project Tracking Using Gantt Chart

The planning view is the default view in the DevPlan client and is immediately displayed when the user logs into DevPlan and selects a project. The default chart in the planning view, the Gantt Chart, provides managers with a high-level description of the status of the subprojects in a DevTrack development project as well as the milestones and dependencies in those projects.

The Gantt Chart provides project managers with standard tools for planning, tracking, and measuring the progress of development projects. The vast majority of DevPlan project planning and tracking tasks are performed in the Gantt Chart.

During the planning stage project managers may use DevPlan to define subproject durations, dependencies, critical paths, resources, and baselines all within the framework of the subproject hierarchy.

- **Durations:** Project managers may define the beginning and end dates of all subprojects in the subproject hierarchy.
- **Dependencies:** The logical relationships between subprojects is defined within the framework of the subproject hierarchy and subproject durations.
- **Critical path:** DevPlan automatically calculates the critical path based on subproject durations and dependencies. The critical path defines the length of the project.
- **Resource allocation:** Based on subproject definitions, the project managers may allocate resources to subprojects and adjust durations as necessary.
- **Baseline:** The optimized project plan is saved as a baseline. The success of the project may be measured against this original estimate. New baselines may be created and compared throughout the life of the project.

Unexpected delays and resources changes may alter the development schedule and require project managers to extend deadlines, allocate additional resources, or make other changes to get a project or subproject back on schedule.

1.1 Working in the DevPlan Gantt Chart

A Gantt chart is a time and activity chart that shows the timing of activities over time that project managers may use to plan, manage, and control subprojects.

The Gantt Chart shows the start and finish dates of all parent (summary) and child subprojects, the percentage of each subproject that is complete, milestones, dependency relationships between predecessor and successor subprojects, and more.

Project managers may define the beginning and end dates of subprojects, define subproject durations, and create relationships between subprojects by dragging-and-dropping graphical elements in the Gantt chart itself.

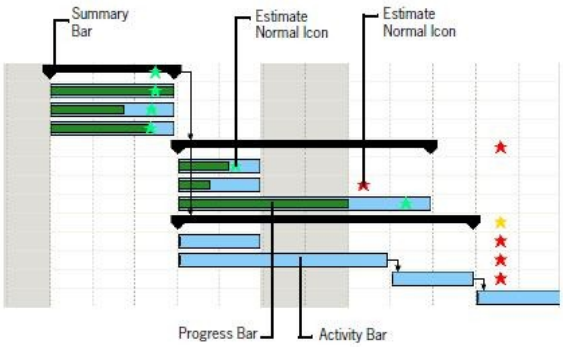
1.2 Reading Gantt Charts

The Gantt Chart is the primary vehicle for viewing, managing, and tracking subproject schedules, progress, and dependencies. It provides project managers with a visual representation of all parent and child subproject activities, milestones, dependencies, and progress within a specific time period.

The DevPlan Gantt Chart is a tool for planning and tracking subprojects enabling project managers to simultaneously view both planned and actual schedules.

- **Project planning:** the Gantt chart displays all planned schedules—planned start dates, end dates, and project durations—and dependencies enabling project managers to view and manage their estimates and projections.
- **Project tracking:** the Gantt chart displays projected end dates that are based on actual schedules. Issue-level progress is recorded in individual tasks in DevTrack and at the meantime “**rolled up”** into DevPlan. This enabling project managers to compare their plans against the progress reported by the development team.

Every parent subproject and child subproject is represented in the Gantt chart by a bar graphic. The two ends of the bar represent the start date and end date of th subproject and the space between the start and end of the bar represent the duration of the subproject. The controlling and chronological relationships between subprojects are also indicated by dependency lines and the the positioning of the bars in the chart timeline.



By default, the Gantt Chart displayed in the DevPlan clients represents project planning elements—subprojects, milestones, schedule estimates, and so on—using the following Gantt chart symbols.

activity bar: An activity bar shows the duration of a child subproject.

critical path bar:A critical path bar shows the critical path—the chain of linked subprojects that define the length of the project.

progress bar:A progress bar represents the current progress of a subproject. The progress bar is superimposed over an activity bar to show the percentage of the activity that is complete in the development side.

summary bar:A summary bar represents a parent subproject. The beginning and end date of a parent subproject is defined by its child subprojects.

milestone icon: The milestone icon represents a project milestone. A milestone is a point in time that represents an important intermediate event. Milestones have no duration.

slack bar: The slack bar represents the lag time that exists between a predecessor and successor subproject.

estimate normal icon: The estimate normal icon marks the date on which the subproject is scheduled to be complete based on issue rollup calculations. The icon indicates that the subproject is on schedule.

estimate delay icon: The estimate delay icon marks the date on which the subproject is scheduled to be complete based on issue rollup calculations. The icon indicates that the subproject is delayed.

estimate child delay icon: The estimate child delay icon marks the date on which the subproject is scheduled to be complete based on issue rollup calculations. The icon indicates that the subproject is delayed based on delays in one or more child subprojects.

The style of a Gantt chart is defined by the color and shape of these eight Gantt chart elements. Project members may customize the style and appearance of the Gantt charts and Gantt bars displayed in their DevPlan client. For more information see*Chapter 3 --Understanding Client Personalization*

1.3 Understanding Gantt Chart Time Scales

The Gantt chart is a time and activity chart that shows planned development tasks over time. DevPlan enables project

managers to view their subprojects at many different levels of detail by changing the scope of the project that is displayed in the chart at any time.

In DevPlan, the time period that is displayed in the Gantt Chart is defined by a time scale. Project managers may choose between seven different time scales to view subprojects at different levels of detail: the Daily view, Weekly view, Monthly view, Quarterly view, Biannual view, and Yearly view.

Project managers may change and adjust the time scale view using controls displayed in the tool bar: the*Zoom In*button, the*Zoom Out*button, and the*Zoom to Fit*button:

 The***Zoom In***button enables project managers to narrow the time scale displayed in the Schedule chart.

 The***Zoom Out***button enables project managers to expand the time scale displayed in the Schedule chart.

 The***Zoom to Fit***button enables project managers to select the time scale best suited to display the active (highlighted) subproject based on its duration.

Daily time scale

The**Daily time scale**displays the individual days in the Gantt Chart.

Weekly time scale

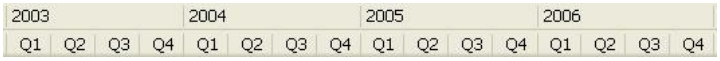
The**Weekly time scale**displays numbered weeks. The first week is based on the beginning date of the root project.

Monthly time scale

The**Monthly time scale**displays each year divided into twelve months.

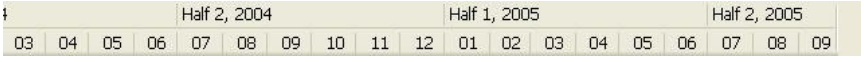
Quarterly time scale

The**Quarterly time scale**displays each year divided into quarters.



Biannual time scale

The**Biannual time scale**displays the year divided into two equal halves consisting of six months each.



Yearly time scale

The Yearly time scale displays individual years.

1.4 Adjusting Gantt Chart Time Scales using controls

Project managers may contract the number of days displayed in the Gantt Chart to better view and track subprojects. The*Zoom In*button enables project managers to limit the scope of the project displayed in the Gantt Chart. The narrowest time scale is divided into months and days.

To narrow the time scale displayed in the Gantt Chart:

1. Select a subproject in the Subproject tree list window.
2. Click the Zoom In button in the tool bar. The Gantt Chart time scale is narrowed.

Project managers may extend the number of days displayed in the Gantt Chart to better view and track subprojects. The*Zoom Out*button enables project managers to extend the scope of the project displayed in the Gantt Chart. The broadest time scale is divided into years and quarters.

To expand the time scale displayed in the Gantt Chart:

1. Select a subproject in the Subproject tree list window.
2. Click the Zoom Out button in the tool bar. The Gantt Chart time scale is expanded.

The Zoom to Fit button enables project managers to display the active (highlighted) subproject in the time scale that is best suited to display the entire duration of that subproject. If the subproject is months long, a longer time scale is used. If the subproject is days long, a weekly or daily time scale may be automatically applied.

To zoom to fit the Schedule chart of the highlighted subproject:

1. Select a subproject in the Subproject tree list window. The active subproject is highlighted in the Gantt chart.
2. Click the*Zoom to Fit*button in the tool bar. The Gantt Chart time scale is resized to display the active project.

Project managers may also use the*Go to Sub-project*button in the tool bar to locate the active (highlighted) subproject in the chart window. This is useful in finding the start date and end date of the selected subproject in addition to manually using the scroll bar.

To go to a subproject:

1. Select a subproject in the Subproject tree list window.
2. Click the*Go To Subproject*button in the tool bar. The active (highlighted) subproject is displayed in the Chart window. The date displayed in the y-axis of the Gantt chart corresponds to the start date of the selected project.

Besides using tool bar icons mentioned above, project managers may simly view past or future activities in the Gantt Chart by clicking and dragging the time scale to the left or to the right.

To view past or future activities:

- To view the past, drag the time scale to the left.
- To view the future, drag the time scale to the right.

2 Managing Subproject Dependency Relationships

DevPlan calculates the project schedule based on the duration of subprojects, the dependency relationships between subprojects, and the subproject structure.

A dependency relationshipis a relationship between two subprojects in which one subproject (the predecessor) controls the start or end of the second subproject (the successor). Generally, preceding subprojects precede their succeeding subprojects chronologically, but they don't necessarily need to. The dependency relationship defines a controlling relationship more than a chronological relationship does.

Dependency relationships determine how the preceding and succeeding subprojects are managed in DevPlan. Project managers may define multiple predecessors for each subproject and each subproject may be both the predecessor of one subproject and the successor to another subproject.

The linking of succeeding subprojects to preceding subprojects forms a network that determines the total time required to complete the project as a whole.

Project managers may analyze the dependency relationships in a project to determine the critical path and other project scheduling implications. For example, dependency relationships are frequently a key factor in prioritizing subprojects and allocating resources.

2.1 Understanding Dependency Relationships

A**dependency**is a relationship between two subprojects in which one subproject (the predecessor) controls the start or end of the second subproject (the successor). In a predecessor-successor relationship, the preceeding subproject controls the progress of the succeeding subproject by defining its schedule.

Predecessor:A predecessor is a subproject that controls the schedule of its successor subprojects. The start or finish of the predecessor subproject determines the planned schedule of the successor subproject.

Successor:A successor is a subproject that is dependent on the planned schedule or progress of one or more predecessor subprojects.

Generally, preceeding subprojects precede succeeding subprojects chronologically, but this is not always the case. In some instances the predecessor subproject may begin after the inception of the succeeding subproject.

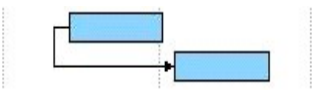
Project managers may create four different types of dependency relationships between subprojects:

- Start To Start
- Start To End
- End To Start
- End To End

Tip: Project managers may define the relationship between preceding and succeeding subprojects in the*Predecessors*tab of the subproject detailed panel.

2.1.1 Start-to-Start Relationships

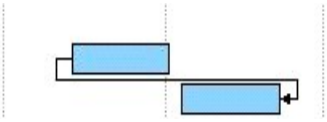
A start-to-start relationship indicates that the planned start of the predecessor**triggers** the planned start of the successor.



Project managers may define a**lag time**between the start of the predecessor and the start of the successor. In a start-to-start relationship the lag time indicates the number of days after the start of the predecessor subproject prior to the start of the successor subproject.

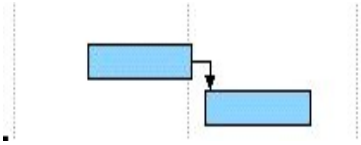
2.1.2 Start-to-End Relationships

A start-to-finish relationship generally indicates that the preceding subproject starts*after the completion*of its succeeding subproject. The planned start of the preceding subproject controls the planned finish of the succeeding subproject.



2.1.3 End-to-Start Relationships

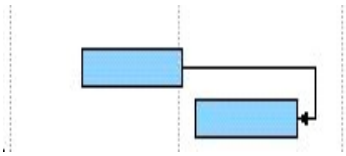
End-to-start relationships are the most common type of dependency relationship. The planned end of the predecessor controls the planned start of the successor—the chronological and controlling relationship between the subprojects is identical.



In this relationship the successor starts only after the predecessor is closed. In the end-to-start relationships,**lag time**can be defined toindicate the number of days after the end of the preceding subproject prior to the start of the successor.

2.1.4 End-to-End Relationships

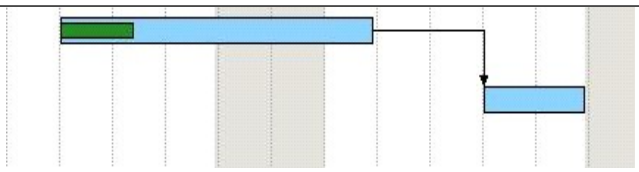
An end-to-end relationship defines a dependency in which the successor continues as long as its predecessor is still in progress.



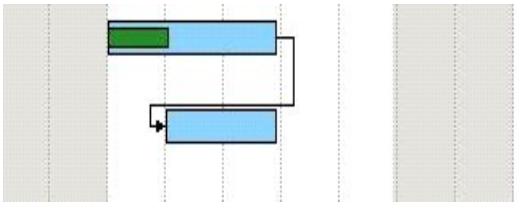
2.2 Understanding Lag Time and Lead Time

The time between the planned start/end of the predecessor and the planned start of the succeeding subproject is called the lag time or the lead time.

- A**lag time**is the time that passes between the completion (or sometimes the beginning) of the preceding subproject and the beginning of the successor. The lag time is always a positive integer. Below is an example of using lag time in an end-to-start relationship:



- The**lead time**is the time prior to the completion of the preceding subproject at which the succeeding subproject should begin. The lead time is always a negative integer. Below is an example of using lead time in an end-to-start relationship. The succeeding subproject would actually begin before the preceding subproject ends.



Tip: Project managers frequently insert lag time between subprojects in their initial plans to provide themselves the flexibility to accommodate missed deadlines.

2.3 Creating Subproject Dependencies

Creating subproject dependencies is helpful in streamlining the product development process. Project members may define the subproject relationships using the*Predecessors*tab in the detail panel. A subproject dependency consists of a predecessor, a dependency type and a lag (or lead) time.

Project members can also take advantage of the linking icons in the tool bar to quickly link subprojects in an**end-to-start**relationship.

2.3.1 Adding and Deleting predecessors in the Predecessors Tab

Project members may define predecessors whenever they create or edit subprojects in the DevPlan client in the*Predecessors*tab. Predecessors may be identified by two methods:

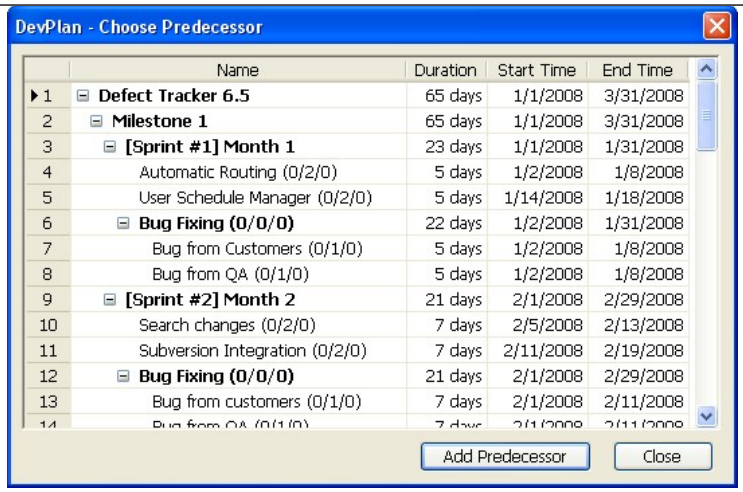
- The ID number of the predecessor may be manually keyed into the ID column of the Predecessor list in the Predecessors tab.
- The predecessor may be located using the*Choose Predecessor*dialog box.

To add subproject predecessors:

1Select a subproject in the Subproject tree list panel. The selected subproject will be the successor.

2Select the*Predecessors*tab in the subproject detail panel.

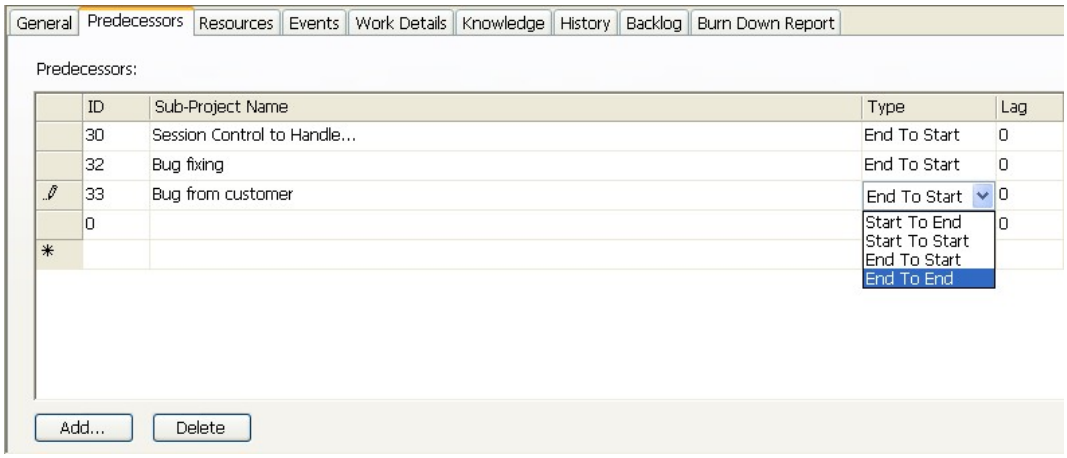
3Click the Add button. The*Choose Predecessor*dialog box appears.



4Locate the appropriate predecessor for the active (highlighted) subproject and click the*Add Predecessor*button. Project managers may add multiple predecessors.

5Click the*Close*button.The*Choose Predecessor*dialog box closes and the selected subprojects are added as predecessors in the Predecessor list of the Predecessors tab in the subproject detail panel.

6The default dependency type is the end-to-start relationship without any lag time. To change the dependency type, double click on the Type column and choose the correct type from the dropdown list.



7 To define a lag time between the predecessor and the succssor, double click on the Lag column and enter the number of days as the lag time.

8Click the*Save*button to save the changes made.

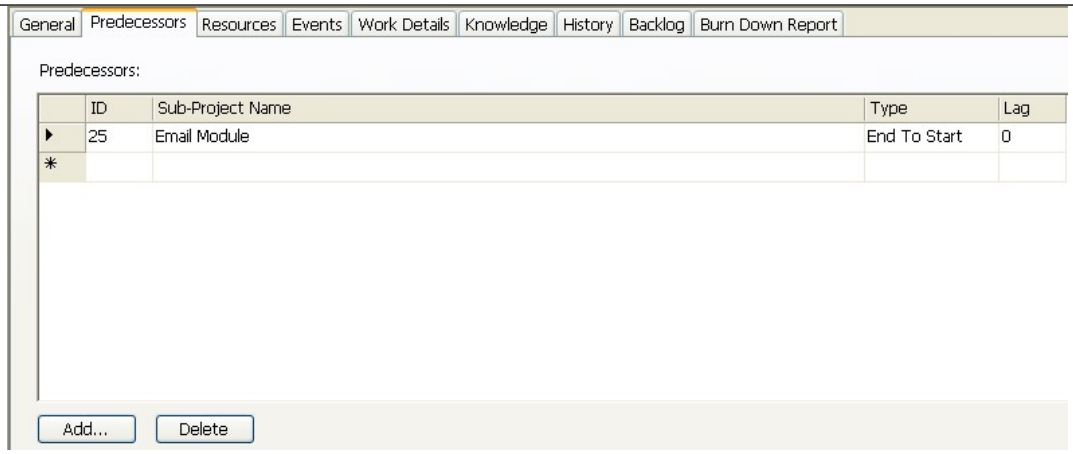
Tip: Instead of brining up the*Choose Predecessors*dialog box, project members can directly enter the ID number of the preceding subproject in the ID column. DevPlan would automaticallypopulate the subproject name based on ID entered.

To delete subproject predecessors:

1Select a subproject in the Subproject tree list panel.

2Select the*Predecessors*tab in the subproject detail panel.

3Click the*Delete*button. The subproject predecessor is deleted immediately.



2.3.2 Creating Subproject Dependencies Using Linking Icons

Project managers may use the Link icon to quickly create**end-to-start**dependency relationships between multiple subprojects using the Link command icon in the tool bar of the planning view. The Link command automatically creates an end-to-start relationship between the selected subprojects.

- The subproject with the lowest subproject ID number (the nearest to the top of the Subproject tree list) is defined as the predecessor.
- The subprojects with the higher subproject ID number subproject ID number (the nearest to the bottom of the Subproject tree list) is defined as the successor.

The start dates of the selected subprojects are completely ignored when determining predecessor and successor relationships. The only factor taken into consideration is the subproject ID number of the subprojects. If multiple subprojects are selected, multiple end-to-start relationships are defined between the selected subprojects.

To link subprojects:

1. Select two subprojects in the Subproject tree list window of the Gantt Chart view. Project managers may select multiple subprojects using the CTRL and SHIFT keys:
   - Press and hold the CTRL key down to select multiple non-contiguous subprojects. Selecting options A and D selects options A and D.
   - Press the SHIFT key to select multiple contiguous subprojects. Selecting options A and D selects options A through D.
2. Click the Link icon.

End-to-start relationships are defined between the selected subprojects.

Project managers may use the*Unlink*icon to quickly delete links between subprojects.

To unlink subprojects:

1. Select two subprojects in the Subproject tree list window of the Gantt Chart view. Project managers may select multiple subprojects using the CTRL and SHIFT keys.
   - Press and hold the CTRL key down to select multiple non-contiguous subprojects. Selecting options A and D selects options A and D.
   - Press the SHIFT key to select multiple contiguous subprojects. Selecting options A and D selects options A through D.

2 Click the Unlink icon .

2.4 Identifying Critical Paths

Once the project manager has defined the subproject hierarchy, subproject durations, and subproject dependencies, DevPlan can automatically calculate the critical path of subprojects that are required to complete the project.

The critical path identifies the chain of linked subprojects that must be completed for the project as a whole to be completed.The critical path is the longest path in the project and defines the total duration of the project.

Identifying the critical path in a development project enables the project manager to optimize the project plan to achieve the right balance between resource usage and project duration. For example, adding or removing resources to subprojects may shorten or lengthen the development time of individual subprojects and the project as a whole.

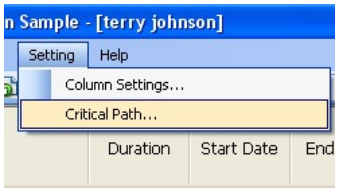
Throughout the project, project managers may keep an eye on the current critical path using the*Critical Subproject report*in the DevPlan report view and make adjustments based on the progress of each subproject in the critical path.

2.4.1 Defining Critical Path Settings

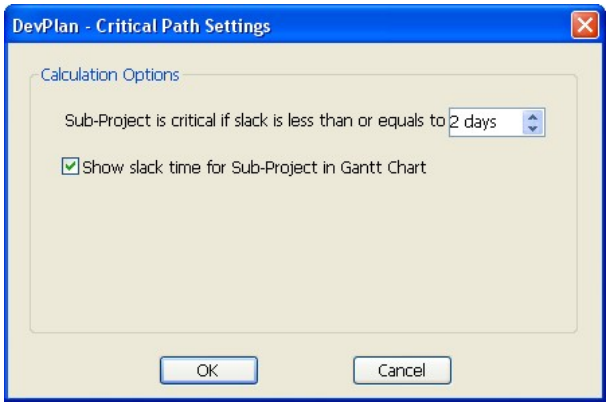
Project members may define how critical paths are calculated in DevPlan projects in the Project Plan Critical Path property sheet.

To define critical path settings:

1 Click the*Critical Path*command in the*Settings*menu. The Critical Path Settings window appears.



2 Define the slack time for subprojects in the*Subproject is Critical if Slack Is Less Than Or Equals To*control.



3 **(Optional)**: To display slack time in the Gantt Chart view, select the*Show slack time for Sub-Project in Gantt Chart*check box.

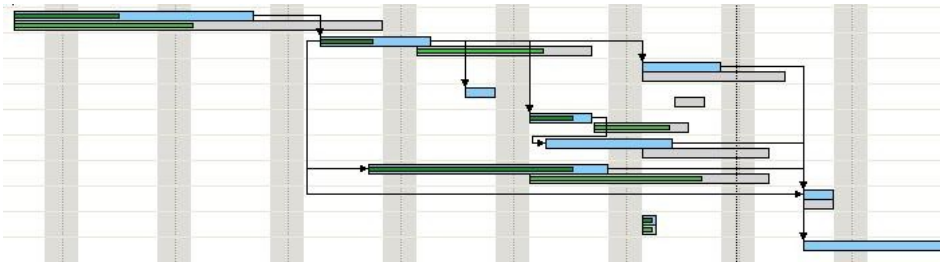
4 Click the OK button.

3 Managing Baselines

A**baseline**represents a set of assumptions that provide development organizations with a snapshot of a project schedule at a point in time. A baseline shows the estimated subproject durations, milestones, and dependencies.

Project managers generally define baselines at the beginning of a project and at key milestones. Comparing current baselines with previous baselines enables project managers to compare their original plans with their actual progress. A baseline enables project managers to track the progress of their projects by comparing the current status of the project with the original estimate or the revised estimates represented by other baselines.

Differences between the schedule captured in a baseline and the actual progress of a project may indicate that the project plan is inaccurate and needs to be updated. DevPlan enables project managers to create and save multiple baselines during the course of a project and compare any two baselines with one another.



Managers may save multiple baselines with unique titles and descriptions. Each baseline defines reference points against which project managers may compare the percentage complete of subprojects, updated subproject durations, and resource allocations.

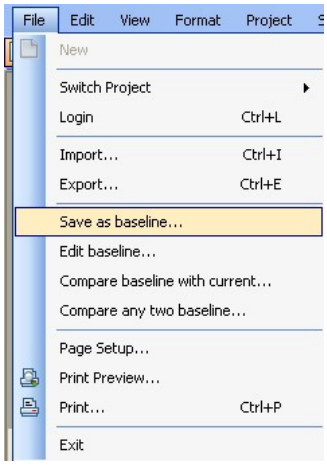
3.1 Creating and Editing Baselines

Project managers may create, save, and compare baselines in the Baseline Chart of the planning view in the DevPlan client.The Baseline Chart view is divided into three windows.

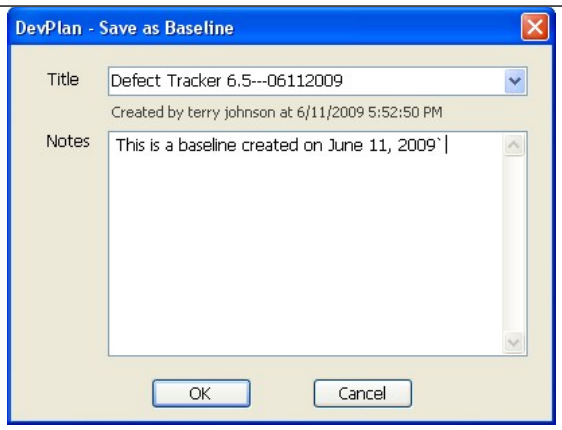
To create (save) a baseline:

1. Select a subproject in the Subproject tree of the Baseline Chart. All subprojects beneath the target subproject are included in the baseline.

2. Select the Save as Baseline command in the File menu. The*Save as Baseline*dialog box appears.



3. Enter the name of the baseline in the*Title*text box control.



4Enter a brief description of the baseline in the*Description*control.

5Click the OK button. The*Save as Baseline dialog box*closes and the baseline is successfully created (saved).

Project managers may also edit the title and description of baselines after the creation.

To edit a baseline:

1Select the*Edit Baseline*command in the*File*menu. The*Edit Baseline*dialog box appears.

2Select a baseline in the Baseline list.

3Select the Edit button. The Edit Baseline dialog box appears.

4Enter the name of the baseline in the Title text box control.

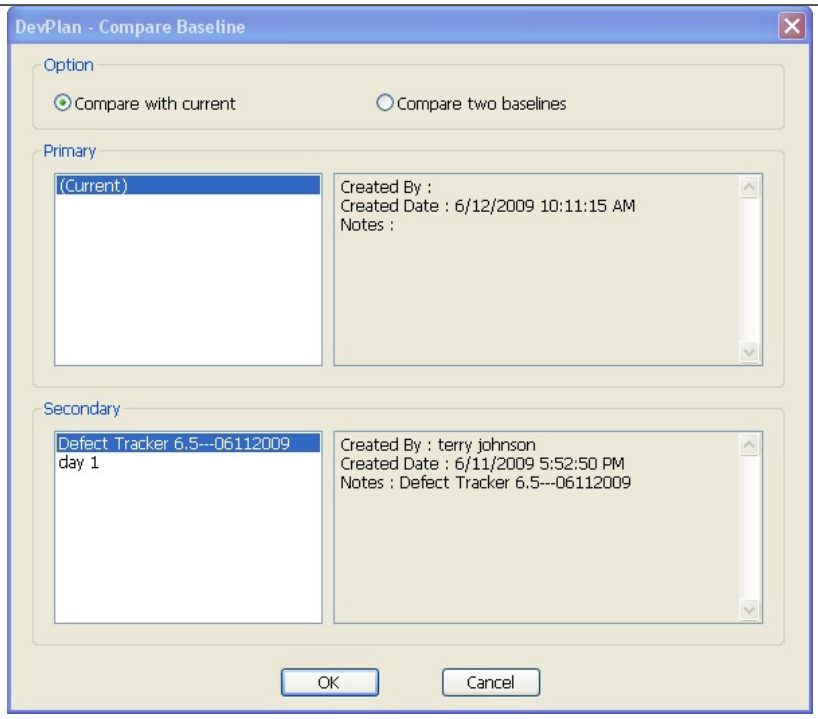
5Enter a brief description of the baseline in the Description control.

6Click the OK button. The*Save as Baseline*dialog box closes and the baseline info is successfully updated.

3.2 Comparing Baseline with Current Progress

To compare baseline with current progress:

1Select the*Compare Baseline with Current*command in the*File*menu. The Compare Baseline dialog box appears.



2Select the*Compare with Current*radio button. The primary list is then set to the current work of subprojects.

3Select a baseline in the Secondary list.

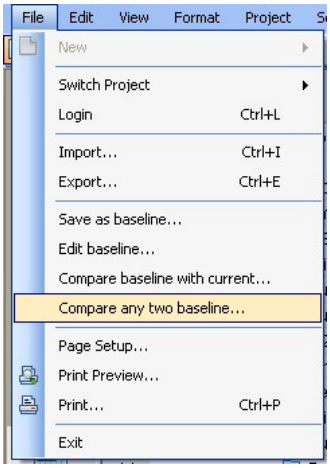
4Click the*OK*button. The current project progress and the loaded baseline are displayed jointly in the Baseline chart. Project members can easily compare the two and draw conclusions from them.Differences between the schedule captured in a baseline and the actual progress of a project may indicate that the project plan is inaccurate and needs to be updated.

3.3 Comparing Two Baselines

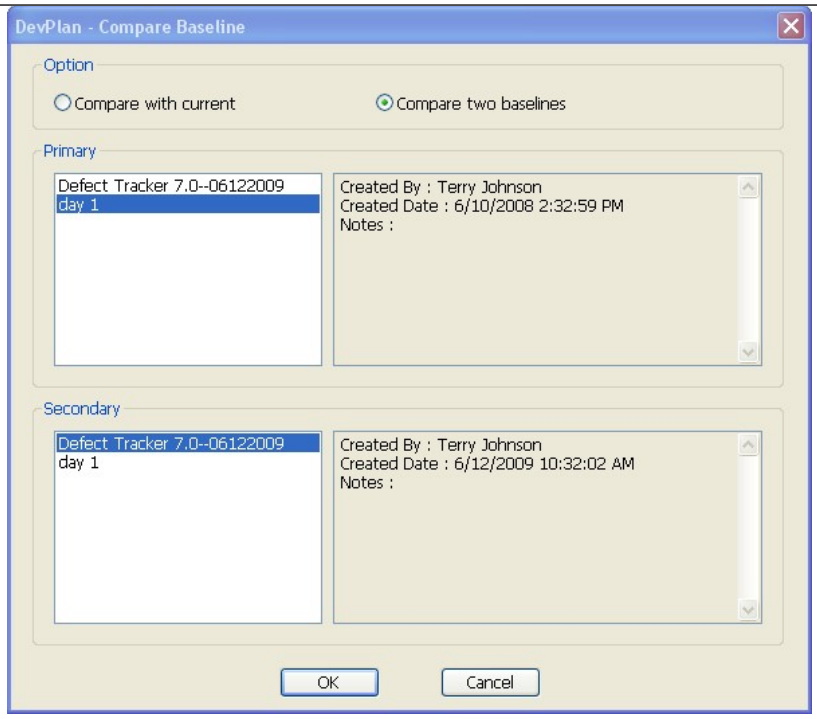
Besides comparing current project work with a saved baseline, DevPlan also enables project members to compare two saved baselines.

To compare two baselines:

1Select the*Compare Any Two Baselines*command in the*File*menu. The*Compare Baselines*dialog box appears.



2Select the*Compare two baselines* radio button.



3Select a saved baseline in the Primary list.

4Select another baseline in the Secondary list.

5Click the OK button. The progress bars of these two baselines are displayed jointly in the Baseline chart.

Chapter 6- Resource and Time Management

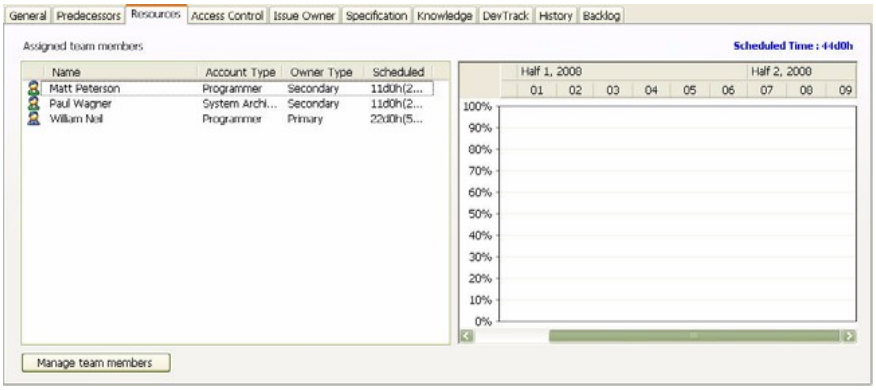
In this chapter:

- Managing Subproject Resources
- Managing Subproject Access Controls
- Managing Subproject Issue Owners
- Working with Load Charts • Working in Resource Sheets

1 Managing Resources, Issue Owners, Subproject Access, and Work Schedules

In DevPlan, a resource is a DevTrack project member that is responsible for managing the development issues in one or more subprojects. Project managers may add different resources to each subproject and define different levels of access and responsibility in each subproject.

Using controls in the Resources tab of the subproject detail panel, project managers may schedule and manage subproject resources



Subproject resources are defined by three responsibilities: subproject ownership, subproject access, and development issue ownership:

- Subproject owners are DevTrack project members that own a particular subproject. A subproject owner may be a primary or secondary owner of a subproject.
- General project members may be granted access to subprojects without owning the subproject or owning the development issues in that project.
- Applicable issue owners are DevTrack project members who may own the development issues managed in a subproject.

DevPlan subproject owner tasks include the assignment of individual project members to each subproject, the assignment of subproject access controls based on account types, group membership, or user accounts, and the definition of subproject schedules.

2 Managing Subproject Resources

A*subproject owner*is a resource that has been identified as a primary or secondary owner of that subproject.

DevPlan subproject owner tasks include the assignment of individual project members to each subproject, the assignment of subproject access controls based on account types, group membership, or user accounts, and the definition of subproject schedules.

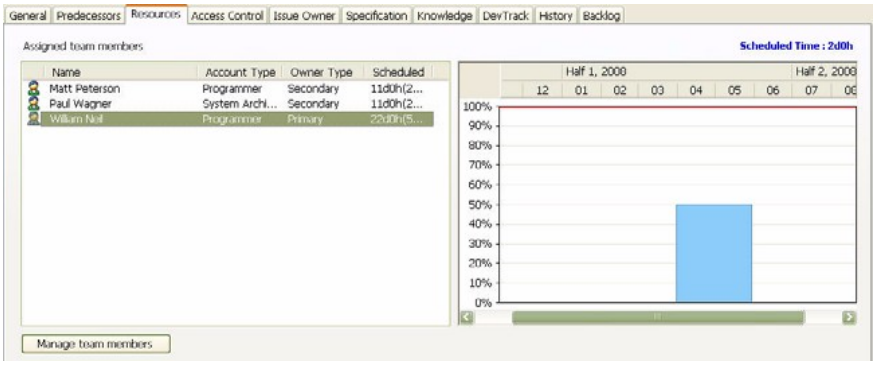
Every resource added to a subproject is identified as either a primary owner or a secondary owner of that subproject. Every subproject may have multiple primary owners and multiple secondary owners.

Primary OwnerA primary owner is a project resource that is deemed to be primarily responsible for the successful completion of a subproject.

Secondary OwnerA secondary owner is a project resource that is has managerial responsibilities within a subproject, but is not the primary owner of that subproject.

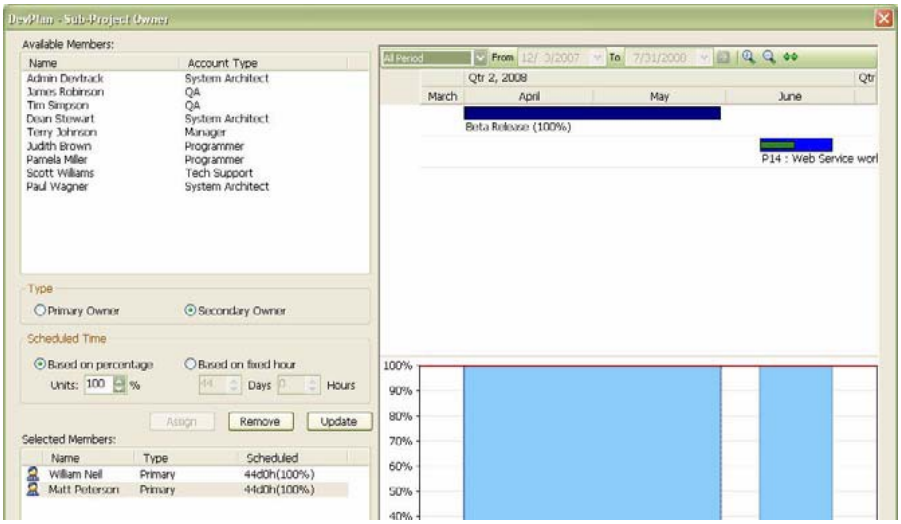
2.1 Tracking Subproject Resources

The Resources tab displays high-level information about the resources assigned to a subproject including their account type, owner type (primary or secondary owner), and the time they are committed to a subproject.



2.2 Adding Resources to Subprojects

Project members may add or remove resources to subprojects, define those resources as primary or secondary owners, and define their schedules whenever they create or edit a subproject in the Resources tab of the Subproject Information manager or subproject detail panel.



To add a resource to a subproject:

1 Select a subproject in the subproject tree list panel.

2 Click the Manage Team Members button in the Resources tab. The Subproject Owner window appears.

3 Select a project team member in the Available Members list.

4 Add the project member as the primary owner or secondary owner of the subproject.

- To define the project member as the primary owner, select the Primary Owner radio button.
- To define the project member as the secondary owner, select the Secondary Owner radio button.

5 Define the schedule of the resource.

- To define the resource schedule as a percentage of their total schedule, select the Based on Percentage radio button and define the percentage of this resource's time that is to be spent on the subproject for the duration of the subproject.
- To define the resource schedule in terms of days and hours, select the Based on Hour radio button and define the number of days and hours that the resource is to work on the subproject for the duration of the subproject.

6 Click the Assign button. The resource is displayed in the Selected Members list.

7 Click the OK button. The Subproject Owner window closes.

2.3 Scheduling Subproject Resources

In DevPlan, project managers may define and track the work schedule of project resources in terms of days and hours or in terms of a percentage of their total work schedule for the duration of the project. heir work schedule for the duration of the subproject.

Fixed Hour Scheduling Based on Fixed Hour scheduling enables the project manager to define the number of days and hours that the resource is scheduled to work on a subproject. The number of days and hours scheduled cannot be greater than the duration of the subproject itself.

Percentage Scheduling Based on Percentage scheduling enables the project manager to define the subproject schedule of the resource as a percentage of that resource's total schedule for the duration of the subproject

For example, assume that a subproject lasts five work days and has four resources assigned to it. Assume also, that each resource is on an eight hour work day.

Resource	Percentage	Days/Hours
Terry Johnson	100%	5d0h
Pamela Miller	75%	3d6h
Dean Stewart	50%	2d4h
William Neil	25%	1d2h

Terry Johnson is scheduled to work eight hours a day for five days on the subproject. William Neil is scheduled to work a total of ten hours on the subproject during the five day period.

2.4 Editing Subproject Resources

Project members may add or remove resources to subprojects, define those resources as primary or secondary owners, and define their schedules whenever they create or edit a subproject in the Resources tab of the Subproject Information manager or subproject detail panel.

To edit subproject resources:

1 Double-click a resource in the Selected Members list of the Resources tab in the subproject detail panel. The Add as Subproject Owner dialog box appears.

2 Add the project member as the primary owner or secondary owner of the subproject.

- To define the project member as the primary owner, select the Primary Owner radio button.
- To define the project member as the secondary owner, select the Secondary Owner radio button.

3 Select a method for tracking the work required of the resource.

- To define the resource schedule as a percentage of their total schedule, select the Based on Percentage radio button and define the percentage of this resource's time that is to be spent on the subproject for the duration of the subproject.
- To define the resource schedule in terms of days and hours, select the Based on Hour radio button and define the number of days and hours that the resource is to work on the subproject for the duration of the subproject.

4 Click the OK button. The resource is displayed in the Select Members list.

2.5 Removing Subproject Resources

To remove subproject resources:

1 Select a project member in the Selected Members list of the Resources tab in the subproject detail panel.

2 Click the Left Arrow button. The resource is removed from the Select Members list.

3 Managing Subproject Access Controls

Access to subprojects may be restricted based on administrator-defined subproject access controls. The accessibility of subproject issues is based on the security-level of the subproject.

All access to DevPlan subprojects is based on access controls granted to DevTrack project members in the Access Control tab of the subproject detail panel.

To define access controls for a subproject, select an option from the Team Access dropdown list control in the Access Control tab of the subproject detail panel.

3.1 Granting Access to Project Members

Project managers may grant subproject access to DevTrack account types, groups, and individual user accounts in the Access Control tab of the subproject detail panel. The Available Team Members list displays all of the account types, groups, and user accounts in the DevTrack project.

Account Type An account type represents a role (a set of responsibilities and privileges) that a user may play in a DevTrack project. Every user account is assigned an account type and is granted access privileges based on their account type.

GroupGroups represent teams of project members that share a common set of responsibilities within a DevTrack project. Groups enable DevTrack project administrators to organize a development team into smaller, specialized entities for functionality, workflow, and security control.

User Account User accounts represent individual DevTrack users. Every user account is assigned a user name and password, an account type, and a DevTrack license.

Project managers may grant access to a subproject based on their account type, group, user account, or the {Subproject Resource} system variable.

To grant subproject access to a team member:

1 Select the Define Applicable option from the Team Access dropdown list control in the Issue Owner tab of the subproject detail panel. The Team Access dropdown list displays two options:

- The All Applicable option
- The Define Applicable option

2 Select one or more account types, groups, user accounts, or system variables in the Available Team Members list.

- Adding an account type enables every user account assigned that account type to access the subproject.
- Adding a group enables every user account assigned that group to access the subproject.

- Adding an user account enables that user to access the subproject.
- Adding the {Subproject Resource} system variable enables every team member defined as a subproject resource in the Resource tab to access the subproject.
- Adding the {Unassigned} system variable enables all DevTrack project members to access the subproject.

3 Click the Right arrow.

Note: To add all account types, groups, user accounts and system variables, click the Double Right arrow.

The selected account type, group, user account, or system variable is added to the Selected Team Members.

3.2 Blocking Access to Subprojects

To prevent project members from accessing subprojects:

1 Select the Define Applicable option from the Team Member dropdown list control in the Access Control tab of the subproject detail panel.

2 Select one or more account types, groups, user accounts, or system variables in the Selected Team Members.

3 Click the Left arrow.

3.3 Defining Access Control Inheritance Rules

Subproject access control rules determine which DevTrack project members may access subprojects. Access control rules may be inherited by child subprojects from their parent subproject. The DevTrack project members granted access in the parent subproject are granted access in its child subprojects as well. Project members may choose two options for defining access control rules in each subproject.

- The Just for this Subproject option enables the project manager to define access controls for the current subproject only. Access control rules for all child subprojects are defined separately.
- The Enforced for all Child Subprojects enables the project manager to define access control rules for the current project and all of its child subprojects.

3.4 Overriding Access Control Inheritance Rules

To override access control inheritance rules:

1 Select the Access Control tab of a child subproject. The Inheritance control in the Access Control tab shows that the Access control inheritance rules for the current subproject are inherited from its parent subproject.

2 Click the Ellipsis button adjacent to the Inheritance control.

3 The Inheritance Relation dialog box appears.

4 Select the Stop Parent Enforcement check box.

5 Select an option from the Inheritance dropdown list control.

6 The Inheritance dropdown list control displays two options:

- The Just for Myself option overrides the access control rules inherited from the parent subproject in the current subproject. The access control rules defined in the parent subproject are still enforced in the child subprojects of the current subproject.
- The Enforce all my Children Subprojects overrides the access control rules inherited from the parent subproject in the current subproject and all of its child subprojects.

7 Click the OK button.

4 Managing Subproject Issue Owners

An issue is a collection of data that represents a particular development task or set of tasks that may be managed, tracked, and processed in a DevTrack project. Every change in ownership, workflow status, and other issue properties is managed and tracked in a DevTrack project. At all times throughout its history, an issue is assigned to one-and-only-one owner

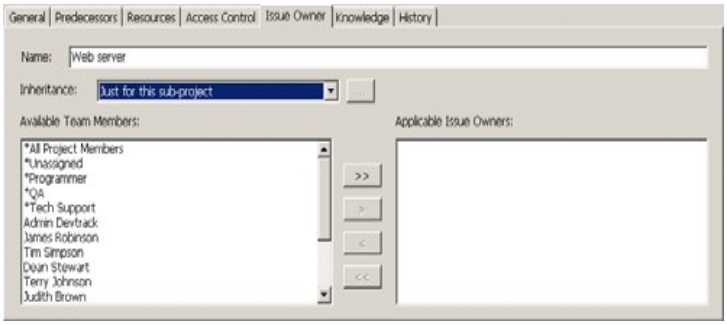
Subprojects divide a project into smaller, more manageable blocks of work. Each subproject represents logical grouping of issues that enable the team to schedule, prioritize, and track those issues separately from other issues in the project.

In DevPlan, project managers may enable DevTrack project members to own the issues managed that are managed in a subproject by defining that project member as an applicable owner. An applicable owner is any project member that may own an issue. Issue ownership may be restricted based on the issue type, issue workflow rules, or subproject restrictions. Every subproject represents multiple issues that must be performed before the subproject, or the project itself can be completed.

4.1 Defining Applicable Issue Owners

An applicable owner is any project member that may own an issue. Every subproject represents multiple issues that must be performed before the subproject, or the project itself can be completed.

Project managers may define DevTrack account types, groups, and individual user accounts as applicable owners of the issues in a subproject in the Issue Owner tab of the subproject detail panel.



The Available Team Members list displays all of the account types, groups, and user accounts that may be defined as applicable owners of an issue in the DevTrack project.

Account Type An account type represents a role (a set of responsibilities and privileges) that a user may play in a DevTrack project. Every user account is assigned an account type and is granted access privileges based on their account type.

GroupGroups represent teams of project members that share a common set of responsibilities within a DevTrack project. Groups enable DevTrack project administrators to organize a development team into smaller, specialized entities for functionality, workflow, and security control.

User Account User accounts represent individual DevTrack users. Every user account is assigned a user name and password, an account type, and a DevTrack license.

Project managers may define DevTrack project members as applicable owners of the issues managed in each subproject based on their account type, group, user account, or the {Subproject Resource} system variable.

To add applicable issue owners:

1 Select the Define Applicable option from the Issue Owner dropdown list control in the Issue Owner tab of the subproject detail panel. The Issue Owner dropdown list displays two options:

- The All Applicable option
- The Define Applicable option

2 Select one or more account types, groups, user accounts, or system variables in the Available Team Members list.

- Adding an account type enables every user account assigned that account type to own issues in the current subproject.
- Adding a group enables every user account assigned that group to own issues in the current subproject.

- Adding an user account enables that user to own issues in the current subproject.
- Adding the {Subproject Resource} system variable enables every team member defined as a subproject resource in the Resource tab to own issues in the current subproject.
- Adding the {Unassigned} system variable enables all DevTrack project members to own issues in the current subproject.

3 Click the Right arrow.

Note: To add all account types, groups, user accounts and system variables, click the Double Right arrow.

The selected account type, group, user account, or system variable is added to the Applicable Owner list.

To remove applicable issue owners:

1 Select the Define Applicable option from the Issue Owner dropdown list control in the Issue Owner tab of the subproject detail panel.

2 Select one or more account types, groups, user accounts, or system variables in the Applicable Owner list.

3 Click the Left arrow. The selected account type, group, user account, or system variable is added to the Available Team Members list.

4.2 Defining Applicable Issue Owner Inheritance Rules

Subproject applicable issue owner rules determine which DevTrack project members may own the issues that have been assigned to a subproject. Applicable issue owner rules may be inherited by child subprojects from their parent subproject.

The DevTrack project members defined as applicable owners in the parent project are deemed to be applicable owners in its child subprojects as well. Project members may choose two options for defining applicable issue owners in each subproject.

- The Just for this Subproject option enables the project manager to define applicable owners for the current subproject only. Applicable owner rules for all child subprojects are defined separately.
- The Enforced for all Child Subprojects enables the project manager to define applicable owner rules for the current project and all of its child subprojects.

To define issue owner inheritance for a subproject, select an option from the Inheritance dropdown list control in the Issue owner tab of the subproject detail panel.

4.3 Overriding Applicable Issue Owner Inheritance Rules

To override applicable issue owner inheritance rules:

1 Select Issue Owner tab of a child subproject. The Inheritance control in the Issue Owner tab shows that the applicable issue owner rules are inherited from its parent subproject.

2 Click the Ellipsis button adjacent to the Inheritance control.

3 The Inheritance Relation dialog box appears.

4 Select the Stop Parent Enforcement check box.

5 Select an option from the Inheritance dropdown list control.

6 The Inheritance dropdown list control displays two options:

- The Just for Myself option overrides the applicable issue owner rules inherited from the parent subproject in the current subproject. The applicable issue owner rules defined in the parent subproject are still enforced in the child subprojects of the current subproject.
- The Enforce all my Children Subprojects overrides the applicable issue owner rules inherited from the parent subproject in the current subproject and all of its child subprojects.

7 Click the OK button.

5 Working with Schedule Charts

The DevPlan Schedule Chart enables project managers to plan and schedule the work assigned to project members in order to optimize their utilization. The Schedule Chart enables project managers to view the subprojects that individual resources have been assigned to over a period of time. Time is shown along the horizontal x-axis and the subproject members along the vertical y-axis.

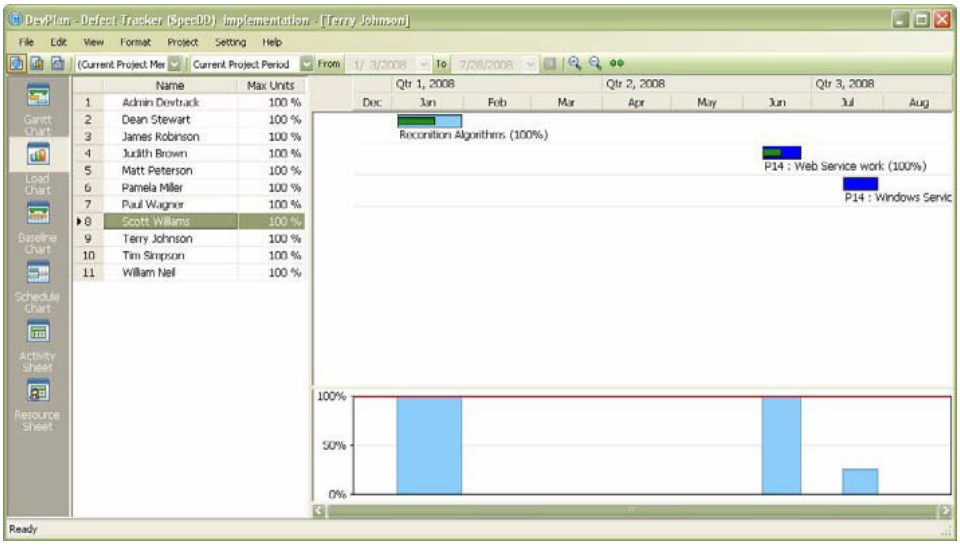
5.1 Filtering Resources in the Schedule Chart

Project managers may filter the resources displayed in the Schedule Chart based on the account type that is assigned to them in the DevTrack project. To filter the resources displayed in the Resource list of the Schedule Chart, select an account type from the Resource dropdown list in the tool bar.

6 Working with Load Charts

The DevPlan Load Chart enables project managers to plan and schedule the work assigned to project members in order to optimize their utilization. Project managers may use the load chart to assure that resources are neither over-burdened with work or under-utilized.

The Load Chart enables project member to view load assigned to individual resources as a percentage of their work schedule in a week, month, or year. Time is shown along the horizontal x-axis and the percentage of time allocated for a project member in vertical y-axis.



Project managers may filter the resources displayed in the Load Chart based on their DevTrack account type.

6.1 Identifying Resource Allocation Problems

The Load Chart enables project managers to view the workload of all project resources. Load Charts enable project

managers to monitor the amount of work assigned to project members and team groups during a specified time period.

The work (load) assigned to project members (resources) is expressed as a percentage of the total number of working hours in a time period.

- A load of 100% indicates that a resource is *fully-allocated* and should not be assigned additional tasks during the time period.
- A load greater than 100% indicates that the resource is *over-allocated* and has been assigned more work than can be completed in the time allotted.
- A load less than 100% indicates that the resource is *under-allocated* and may be assigned additional tasks during the time period.

For instance, if a programmer is committed to work 100% of the time in 2 areas at the same time, may result in both projects. The load chart lets you see where these oversights in planning occur and correct them.

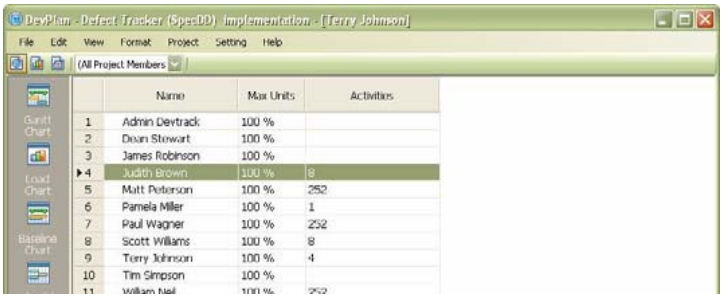
6.2 Filtering Resources in the Load Chart

Project managers may filter the resources displayed in the Load Chart based on the account type that is assigned to them in the DevTrack project.

To filter the resources displayed in the Resource list of the Load Chart, select an account type from the Resource dropdown list in the tool bar.

7 Working in Resource Sheets

The Resource Sheet shows how particular resources or groups of resources (team groups) are used in a project.



7.1 Filtering Resources in the Resource Sheet

To filter resources in the resource sheet:

Project managers may filter the resources displayed in the Resource Sheet based on the account type that is assigned to them in the DevTrack project. To filter the resources displayed in the Resource list of the Resource Sheet, select an account type from the Resource dropdown list in the tool bar.

7.2 Managing Resource Sheet Column Settings

Project managers may display six different subproject properties in the resource sheet, rename or format each column, and order the columns.

- Name
- Max Units
- Reservations
- Initial
- ID
- Resource Type

To add or remove resource sheet columns:

1 Select the Resource Sheet in the chart bar. Select the Column Settings command in the Settings menu. The

Column Setting manager appears.

2 Add or remove columns to the resource sheet.

- To add columns to the resource sheet, select the column in the Display Columns list and click the Right Arrow button.
- To remove columns from the resource sheet, select the column in the Available Columns list and click the Left Arrow button.

3 Click the OK button.

Chapter 7- Using other Charts in Project View

Wiki Summary.

1 Working with Resource Chart

The Resource Sheet shows how particular resources or groups of resources (team groups) are used in a project.

Filtering Resources in the Resource Sheet To filter resources in the resource sheet:
Project managers may filter the resources displayed in the Resource Sheet based on the account type that is assigned to them in the DevTrack project. To filter the resources displayed in the Resource list of the Resource Sheet, select an account type from the Resource dropdown list in the tool bar.

Managing Resource Sheet Column Settings
Project managers may display six different subproject properties in the resource sheet, rename or format each column, and order the columns.

- Name
- Max Units
- Reservations
- Initial
- ID
- Resource Type

To add or remove resource sheet columns:

1Select the Resource Sheet in the chart bar. Select the Column Settings command in the Settings menu. The Column Setting manager appears.

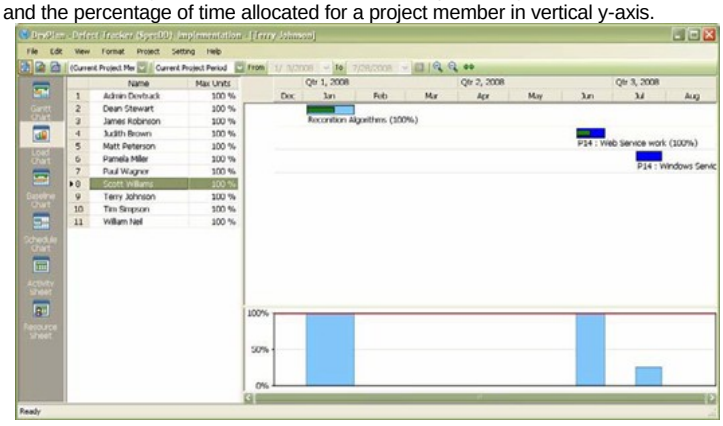
2Add or remove columns to the resource sheet.

- To add columns to the resource sheet, select the column in the Display Columns list and click the Right Arrow button.
- To remove columns from the resource sheet, select the column in the Available Columns list and click the Left Arrow button.

3Click the OK button.

2 Working with Load Chart

The DevPlan Load Chart enables project managers to plan and schedule the work assigned to project members in order to optimize their utilization. Project managers may use the load chart to assure that resources are neither over-burdened with work or under-utilized. The Load Chart enables project member to view load assigned to individual resources as a percentage of their work schedule in a week, month, or year. Time is shown along the horizontal x-axis and the percentage of time allocated for a project member in vertical y-axis.



Project managers may filter the resources displayed in the Load Chart based on their DevTrack account type.

Identifying Resource Allocation Problems
The Load Chart enables project managers to view the workload of all project resources. Load Charts enable project managers to monitor the amount of work assigned to project members and team groups during a specified time period. The work (load) assigned to project members (resources) is expressed as a percentage of the total number of working hours in a time period.

• A load of 100% indicates that a resource is*fully-allocated*and should not be assigned additional tasks during the time period.

• A load greater than 100% indicates that the resource is*over-allocated*and has been assigned more work than can be completed in the time allotted.

• A load less than 100% indicates that the resource is*under-allocated*and may be assigned additional tasks during the time period. For instance, if a programmer is committed to work 100% of the time in 2 areas at the same time, may result in both projects. The load chart lets you see where these oversights in planning occur and correct them.

Filtering Resources in the Load Chart
Project managers may filter the resources displayed in the Load Chart based on the account type that is assigned to them in the DevTrack project. To filter the resources displayed in the Resource list of the Load Chart, select an account type from the Resource dropdown list in the tool bar.

3 Working with Schedule Chart

The DevPlan Schedule Chart enables project managers to plan and schedule the work assigned to project members in order to optimize their utilization. The Schedule Chart enables project managers to view the subprojects that individual resources have been assigned to over a period of time. Time is shown along the horizontal x-axis and the subproject members along the vertical y-axis.

Filtering Resources in the Schedule Chart
Project managers may filter the resources displayed in the Schedule Chart based on the account type that is assigned to them in the DevTrack project. To filter the resources displayed in the Resource list of the Schedule Chart, select an account type from the Resource dropdown list in the tool bar. Figure 5-6: Schedule Chart

3.1 Using Toolbar when working with Resource Chart

Please input description.

3.2 Using Toolbar when working with Load Chart

Please input description.

3.3 Using Toolbar when working with Schedule Chart

Please input description.

4 Working with Activity Sheet

Please input description.

4.1 Using Toolbar when working with Activity Sheet

Please input description.

5 Working with Resource Sheet

Please input description.

5.1 Using Toolbar when working with Resource Sheet

Please input description.

Chapter 8- Advanced Functions

In this chapter:

- Understanding Events and Quality Management
- Managing Events in the Event Calendar
- Managing Events in the Subproject Detail Window
- Managing Microsoft Outlook Synchronization

1 Understanding Events and Quality Management

Throughout the project planning process, project managers may schedule and manage subproject team meetings as subproject events.

A**subproject event**is a management task linked to a subproject that facilitates communication and collaboration between subproject stakeholders. Typical subproject events include brainstorming sessions, team meetings, design reviews, management reviews, presentations, and product demos.

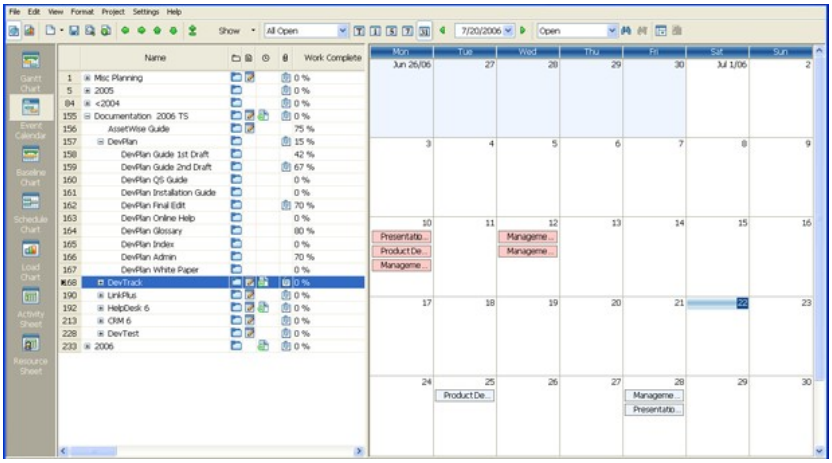
Subproject events are the vehicle that drive the planning process and ensure the quality of the end product. Regular team meetings scheduled within DevPlan enable project managers ensure that all project team members are working together to meet project objectives. Every subproject event is based on an administrator-defined event template.

Project administrators may enable subproject events, create, edit, and delete subproject event templates, and configure subproject event notification rules in the Subproject Event subfolder in the Subproject folder in the DevTrack Admin client.

2 Managing Events in the Event Calendar

Project managers may view, create, and manage subproject events in the Event Calendar. Event calendars enable project managers to quickly create events in a calendar and scroll through the calendar to view all active events.

The subproject event owner may define the start and end time of the event, invite attendees, and manage the status of the event in the Events tab of the subproject detail window or in the Event Calendar.



The Event Calendar displays all subproject events during a defined period of time. Users may filter the events displayed in the Event Calendar by subproject, or choose between daily, weekly, or monthly calendar views.

2.1 Selecting Event Calendars

The tool bar in the Event Calendar displays five control buttons that enable project members to quickly view ranges of dates in the chart window of the Event Calendar.

Today button

Day button

Work Week button

Week button

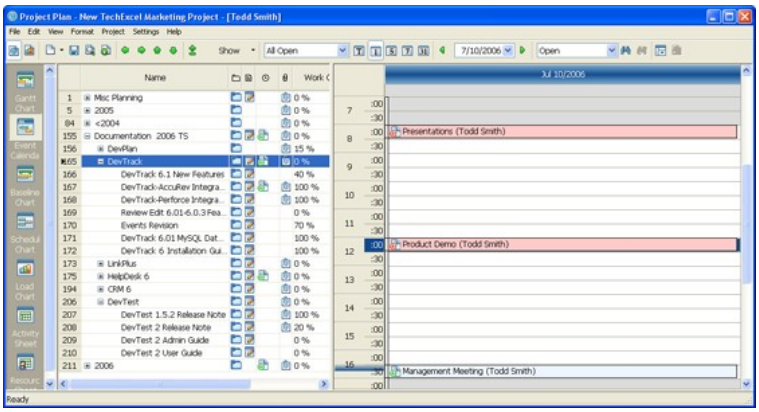
Month button

2.2 Going to Current Date in the Event Calendar

The Today button enables project managers to quickly go to the current day in the selected event calendar.

2.3 Displaying the Daily Event Calendar

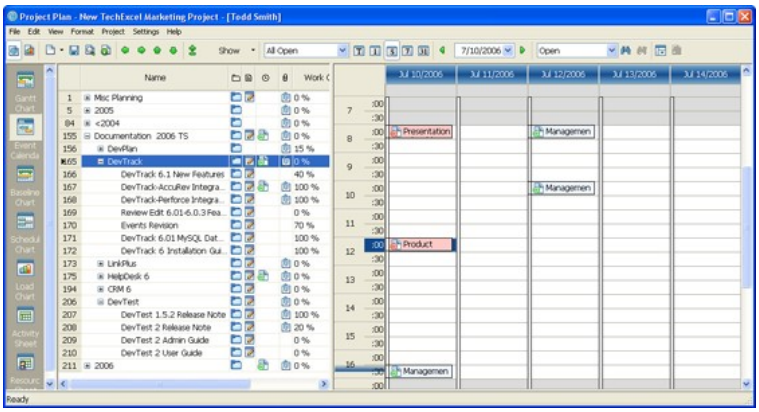
The daily event calendar displays all of the events schedule for a single day.



To display the daily event calendar, select the Day button in the Event tool bar.

Displaying Five Day Week Event Calendar

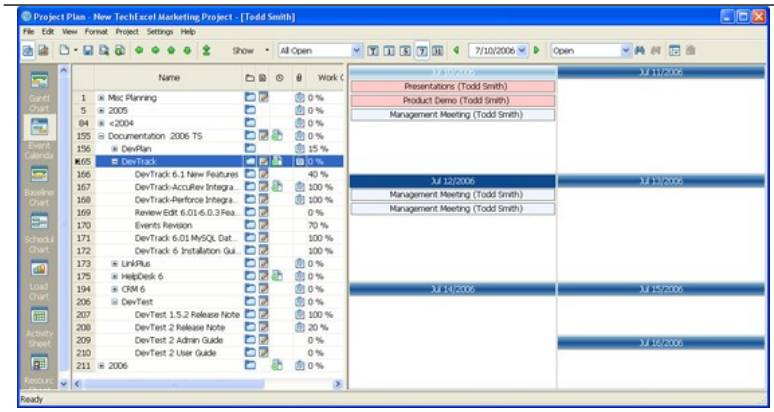
The five day week event calendar displays all of the events scheduled for a single work week.



To display the daily event calendar for the work week (excluding the weekend), select the Work Week button in the Event tool bar.

Displaying Seven Day Week Event Calendar

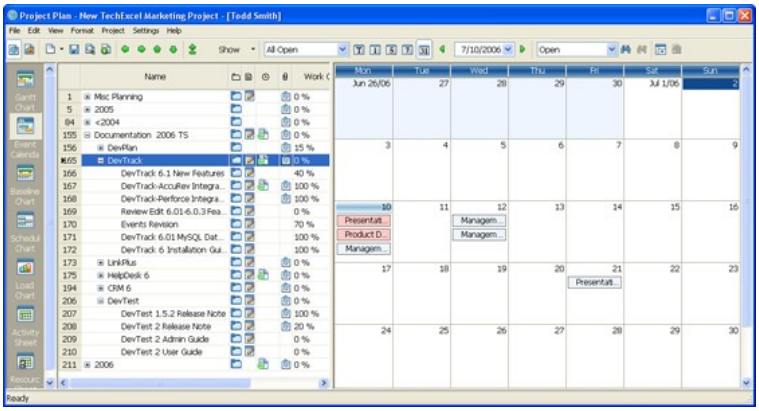
The seven day week event calendar displays all of the events scheduled for a the current week including the weekend.



To display the weekly event calendar for the entire week (including the weekend), select the Week button in the Event tool bar.

2.4 Displaying Monthly Event Calendar

The monthly event calendar displays all of the events scheduled for the current month.



To display the monthly event calendar, select the Day button in the Event tool bar.

2.5 Scrolling Subproject Event Calendars

The Calendar Scroll control in the tool bar of the Event Calendar enables project managers to scroll through event calendars to view past and future events.

To scroll event calendars:

1. Select an event calendar in the Event Calendar tool bar.
2. Scroll into the future or the past by clicking the Calendar Scroll control.
   - To view previous calendars, select the Back arrow button.
   - To view future calendars, select the Forward arrow button.

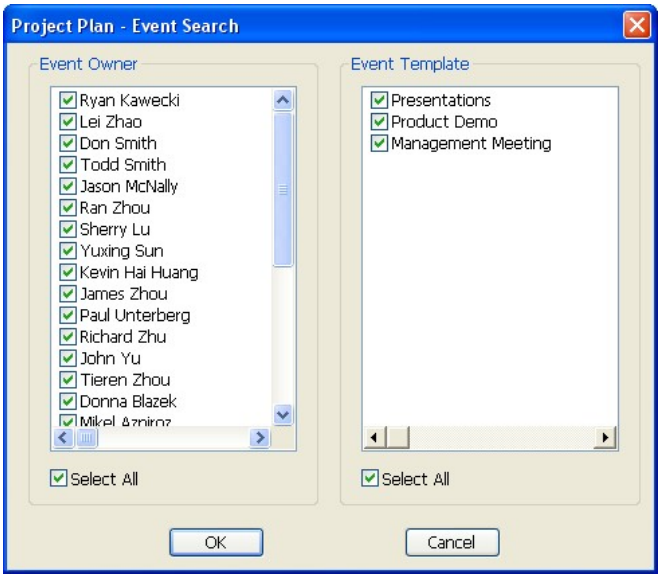
2.6 Filtering Events by Event Status in the Event Calendar

To filter events in the Event Calendar, select an option from the Event Status dropdown list in the Event Calendar tool bar.

- Open events (Overdue and Not Overdue)
- Closed events (Successful and Failed)
- Open and Closed Events

2.7 Searching for Subproject Events

Project managers may search for events based on event owners and the event templates used to create those events. The Event Search manager enables project members to define search criteria for events.



To search for events:

1. Select a subproject in the Subproject tree list window.
2. Select an event calendar in the Event Calendar tool bar.
3. **(Optional):** To limit the scope of the search based on the status of the event, select an option from the Event Status dropdown list.
4. Select the Event Search button in the tool bar.
5. The Event Search manager appears.
6. Select one or more event owners in the Event Owner list.
7. Select one or more event templates in the Event Template list.
8. Click the OK button.

2.8 Cancelling Event Searches

To cancel an event search, select the Cancel Search button in the Event Calendar tool bar.

2.9 Creating Subproject Events in the Event Chart

Project managers may create events in the Chart window and the Subproject tree list window of the Event Chart.

To create events in the Subproject tree list window:

1. Right-click a subproject in the Subproject tree list window of the Event Chart view.
2. Select the New Event command in the shortcut menu. The Edit Event property screen appears.
3. Select an event template from the Event Template dropdown list. The Event Template dropdown list displays every event template defined by the project administrator. Examples might include:

   - Brainstorm & Discussion
   - Design Review
   - Management Review
   - Presentations
   - Principle Engineer Review
   - Product Demo

4 Define a unique name for the event in the Name text box control.

5 Define a unique name for the event in the Description text box control.

6 Select an option from the Status dropdown list. The Status dropdown list displays three options:

- Open
- Closed - Successfully
- Closed - Failed

7 Select an option from the Owner dropdown list. The Event Template dropdown list displays the names of project members that are applicable owners for the subproject.:

8 Optional: To define event attendees, click the Ellipsis button and add attendees to the event in the Add Attendee dialog box.

9 Define the beginning of the event in the Start Date control.

10 Define the beginning of the event in the End Date control.

11 Click the OK button.

2.10 Creating Subproject Events

To create an event in the Event Calendar:

1 Select a subproject in the Subproject tree list window.

2 Select an event calendar.

3 Right-click a date in the Event Calendar and select the New Event command in the shortcut menu. The Edit Event manager appears.

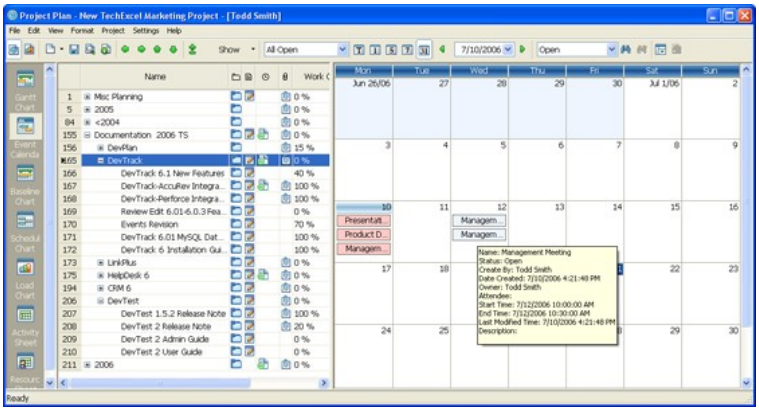
4 Define event properties.

- Event template
- Name
- Description
- State Owner
- Start date
- Due Date

5 Click the OK button.

2.11 Viewing Subproject Event Info in the Event Calendar

To view event details, hover over an event in the Event Calendar.



The Event Info popup window displays high-level information about an event including

- Name

- Status
- Create By
- Date Created
- Owner
- Attendees
- Start Time
- End Time
- Last Modified Time
- Description

Project managers may view event info in the Event Calendar by hovering over an event. For more information see “Viewing Event Details in the Event Info Tab”

2.12 Editing Subproject Events

To edit events in the Event Calendar:

1. Select a subproject in the Subproject tree list window.
2. Select an event calendar.
3. Right-click a date in the Event Calendar and select the Open command in the shortcut menu. The Edit Event manager appears.
4. Define event properties.
    - Event template
    - Name
    - Description
    - State Owner
    - Start date
    - Due Date
5. Click the OK button.

2.13 Sending Meeting Requests

Project managers may create and sent meeting requests by e-mail from within the DevPlan client. Recipients of DevPlan meeting request e-mail may create appointments in their e-mail client (for example, Microsoft Office Outlook) by accepting the meeting invitation.

To send a meeting request:

1. Select a subproject in the Subproject tree list window.
2. Select an event calendar.
3. Right-click a date in the Event Calendar and select the Open command in the shortcut menu. The Edit Event manager appears.
4. Click the Send Meeting Request button. The Send Meeting Request window appears.
5. Enter the e-mail address of one or more addressees in the To control.
6. **Optional**: Edit the subject line of the e-mail in the Subject control. By default the Subproject control is populated by the title of the event.
7. **Optional**: Edit the body of the e-mail. By default the body of the e-mail populated by the description of the event.
8. Click the Send button. The Send Meeting Request window closes and the e-mail is sent.

2.14 Deleting Subproject Events

To delete a subproject event:

1. Select a subproject in the Subproject tree list window.

2Select an event calendar.

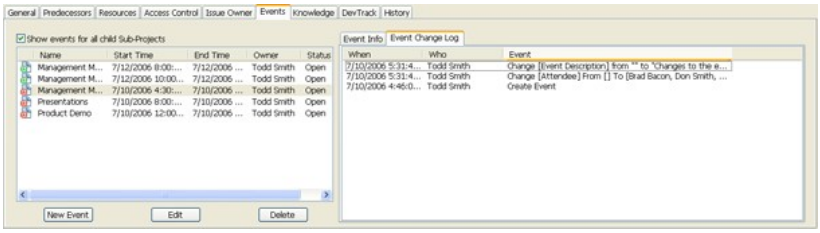
3Right-click a date in the Event Calendar and select the Delete command in the shortcut menu.

4A warning dialog box appears.

5Click the Yes button.

3 Managing Events in the Subproject Detail Window

Project managers may create, edit, and review events in the Events tab of the subproject detail window of the DevPlan client. The subproject detail window may be displayed in the Gantt Chart and the Event Chart. The Events tab in the subproject detail window displays high-level and detailed information about the events associated with a particular subproject.



The Event tab consists of three main areas:

- Event list control
- Event Info tab
- Event Change Log

3.1 Viewing Events in the Event List

Project managers may view high-level information about the events belonging to a subproject and, optionally, its child subprojects in the Event list of the Event tab in the subproject detail window.

The Event list displays high-level information about events in a tabular format. Each column represents an even property. Each row represents an event and displays the event property values for that event.

- Name
- Start Time
- End Time
- Owner
- Status

The Status of events is indicated by an event icon displayed in the Event list.

The red Overdue Event icon indicates that the event is open and the end time has passed.

The green On Schedule Event icon indicates that the event is open and the end time is in the future.

3.2 Showing Events of Child Subprojects

To display events assigned to child subprojects, select the Show Events of All Child Subprojects check box in the Events tan.

3.3 Viewing Event Details in the Event Info Tab

The Event Info tab displays high-level information about an event including

- Name: Status
- Create By
- Date Created
- Owner:

- Attendee
- Start Time:
- End Time:
- Last Modified Time:
- Description

Project managers may view event info in the Event Calendar by hovering over an event. For more information see “Viewing Subproject Event Info in the Event Calendar”

3.4 Understanding Event Change Logs

The Event Change Log displays a list of all of the changes made to an event from its creation to its closure. The Event Change log displays the name of the person that made the change, the change made, and the time of the change. Changes recorded in the Event Change log include:

- Event creation
- Changes to event status
- Changes to event attendees
- Changes to event descriptions
- Changes in event scheduling.

3.5 Creating Subproject Events

To create events in the subproject detail window:

1 Select a subproject in the Subproject tree list window.

2 Select the New button in the Events tab of the subproject detail window. The Edit Event property screen appears.

3 Select an event template from the Event Template dropdown list. The Event Template dropdown list displays every event template defined by the project administrator in the integrated project. Examples might include:

- Brainstorm & Discussion
- Design Review
- Management Review
- Presentations
- Principle Engineer Review
- Product Demo

Note: All subproject event templates are defined by a project administrator in the DevTrack Admin client.

4 Define a unique name for the event in the Name text box control.

5 Define a unique name for the event in the Description text box control.

6 Select an option from the Status dropdown list.

The Status dropdown list displays three options:

- Open
- Closed - Successfully
- Closed - Failed

7 Select an option from the Owner dropdown list. The Event Template dropdown list displays the names of project members that are applicable owners for the subproject.:

8 Optional: To define event attendees, click the Ellipsis button and add attendees to the event in the Add Attendee dialog box.

9 Define the beginning of the event in the Start Date control.

10 Define the beginning of the event in the End Date control.

11 Click the OK button.

To create events in the Subproject tree list window:

1Right-click a subproject in the Subproject tree list window of the Event Chart view.

2 Select the New Event command in the shortcut menu. The Edit Event property screen appears.

3 Select an event template from the Event Template dropdown list. The Event Template dropdown list displays every event template defined by the project administrator. Examples might include:

- Brainstorm & Discussion
- Design Review
- Management Review
- Presentations
- Principle Engineer Review
- Product Demo

Note: All subproject event templates are defined by project administrators in the DevTrack Admin client.

4 Define a unique name for the event in the Name text box control.

5 Define a unique name for the event in the Description text box control.

6 Select an option from the Status dropdown list. The Status dropdown list displays three options:

- Open
- Closed - Successfully
- Closed - Failed

7 Select an option from the Owner dropdown list. The Event Template dropdown list displays the names of project members that are applicable owners for the subproject.:

8 **Optional**: To define event attendees, click the Ellipsis button and add attendees to the event in the Add Attendee dialog box.

9 Define the beginning of the event in the Start Date control.

10 Define the beginning of the event in the End Date control.

11 Click the OK button.

3.6 Deleting Events in the Subproject Detail Window

To delete events:

1 Select an event in the Event list of the Events tab in the subproject detail window.

2 Click the Delete button in the Event tab. A warning dialog box appears.

3 Click the OK button.

3.7 Editing Events in the Subproject Detail Window

To edit events:

1 Select an event in the Event list of the Events tab in the subproject detail window.

2 Click the Edit Event button in the Event tab. The Edit Event property screen appears.

3 Select an event template from the Event Template dropdown list. The Event Template dropdown list displays every event template defined by the project administrator. Examples might include:

- Brainstorm & Discussion
- Design Review
- Management Review
- Presentations
- Principle Engineer Review
- Product Demo

4 Define a unique name for the event in the Name text box control.

5 Define a unique name for the event in the Description text box control.

6 Select an option from the Status dropdown list. The Status dropdown list displays three options:

- Open
- Closed - Successfully
- Closed - Failed

7 Select an option from the Owner dropdown list. The Event Template dropdown list displays the names of project members that are applicable owners for the subproject.:

8 Optional: To define event attendees, click the Ellipsis button and add attendees to the event in the Add Attendee dialog box.

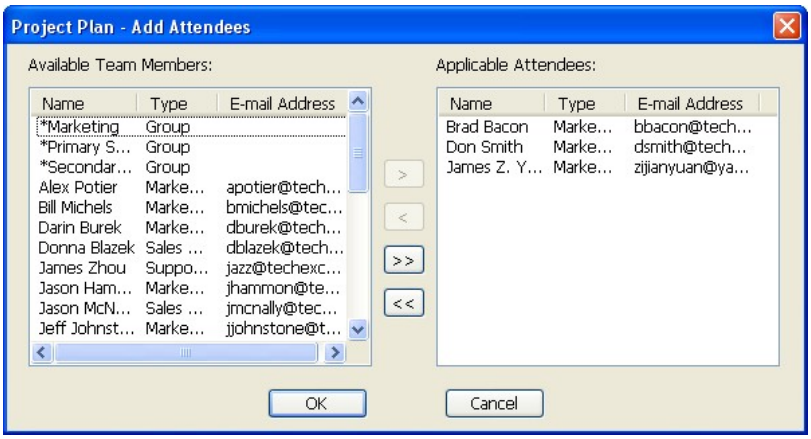
9 Define the beginning of the event in the Start Date control.

10 Define the beginning of the event in the End Date control.

11 Click the OK button.

3.8 Adding Attendees to Subproject Events

Project members may add attendees to events whenever they create or edit an event in the Event tab of the subproject detail window.



To add attendees to events:

1Click the Attendee button in the Edit Event property sheet.

2The Attendee dialog box appears.

3Add or remove project members to the event.

- To add project members as attendees, select the names of the project members in the Available Team Members list and click the Right Arrow button.
- To remove project members as attendees, select the names of the project members in the Applicable Attendees list and click the Left Arrow button.

4Click the OK button.

3.9 Understanding Subproject Event E-mail Notification Rules

E-mail integration provides project managers with a powerful scheduling system for inviting subproject stakeholders to subproject events. Project administrators may define e-mail notification rules to automatically invite stakeholders to an event based on administrator-defined rules.

- E-mail notification may be triggered by the creation or completion of a subproject event, or changes in ownership or status.
- Subproject events may be automatically routed to the event owner, the primary owners and secondary owners of the subproject, event attendees, and others.

Each subproject event notification rule consists of a trigger, one or more notification actions, a set of potential recipients, and optionally a notification condition that limits the scope of the subproject event notification rule based on issue or event properties. As with other notification rules, project administrators may define unique subscription settings for each project member.

Potential recipients of subproject event actions are based on six different system variables:

System Variable	Definition
{Event Submitter}	The {Event Submitter} variable represents the submitter of the subproject event.
{Event Owner}	The {Event Owner} variable represents the owner of the subproject at the time that the event is created.
{Event Attendee}	The {Event Attendee} variable represents every DevTrack project member that has been invited to the event by the event submitter.
{Sub-Project Primary Owner}	The {Sub-Project Primary Owner} variable represents a subproject resource that has been designated as a primary owner of that subproject.
{Sub-Project Secondary Owner}	The {Sub-Project Secondary Owner} variable represents a subproject resource that has been designated as a primary owner of that subproject.
{Sub-Project Applicable Issue Owner}	The {Event Submitter} variable represents the submitter of the subproject event.

Future integration with Microsoft Outlook and Microsoft Exchange Server will enables project managers to view the personal calendars of potential attendees from within the DevPlan client whenever they schedule a subproject event.

Chapter 9- Agile (Iterative) Development

1 Managing Iterative Development Subprojects

In DevSuite, subprojects enable development organizations to manage, schedule, and track iterations of development by organizing development tasks into distinct areas of development.

Subprojects define the structure that is used to organize and manage the backlog.

In DevSuite, a subproject is a logical grouping of issues within a DevTrack development project that enables development teams to schedule, prioritize, and track those issues separately from other issues in the project.

Each subproject has its own description, priority, status, and start and end dates that define how issues are managed as a group. Moreover, issue access controls, applicable issue type rules, and workflow rules may be defined independently for each subproject.

Subprojects are represented in the issue tree panel of the DevPlan clients as *subproject folders* organized in an hierarchical tree structure.

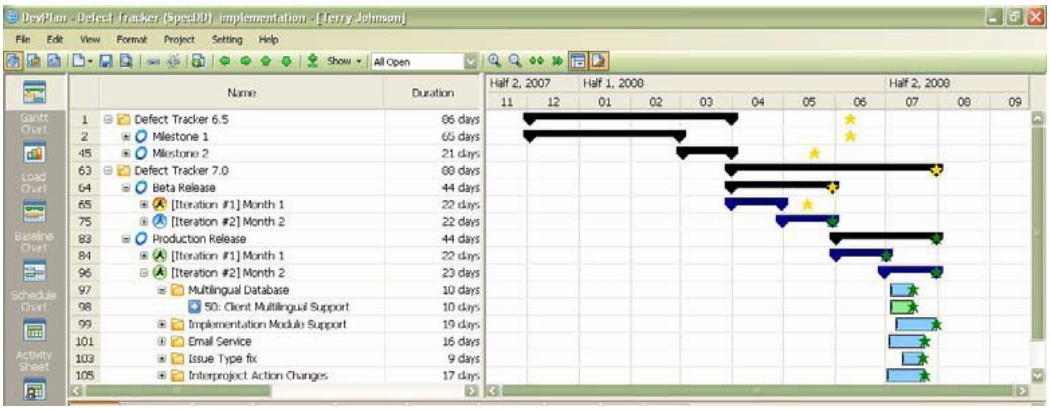


Figure 3-2: Subproject Tree Window

Subprojects are identified by subproject type in the subproject tree list panel:

- A regular subproject is identified by a gold folder.
- All iterative group subproject is identified in the subproject tree panel by the iterative group icon.
- The yellow iterative subproject icon identifies a current iteration.
- The green iterative subproject icon identifies a closed iteration.
- The green iterative subproject icon identifies a future iteration.

The hierarchical structure of subprojects defines and represents the parent-child relationships between subprojects. Every user-defined subproject is the child of a parent subproject and may be the parent to one or more child subprojects. Subproject due dates, delivery dates, and notes may be inherited by child subprojects from their parent subproject.

2 Subproject Types and Iterative Development

In DevSuite, subprojects enable development organizations to manage, schedule, and track iterations of development by organizing development tasks into distinct areas of development.

DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy.

A product defect subproject is identified by a blue folder.

Iterative Group Subproject (Milestone): An iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product.

Iterative Subproject (Sprint): An iterative subproject is a tool for organizing, managing, and tracking a set of implementation tasks within a set time period. The iterative subproject defines the tasks that must be completed to meet the goals of an iteration.

Defect Tracking Subproject:

Regular Subprojects:A regular subproject defines a distinct area of work within a project. Regular subprojects may be used to organize the work within an iterative subproject or within the project itself.

The hierarchical structure shows the relationships between groups of issues and defines how those issues are managed.

Project members may filter, search for, and run reports on development issues based on their subproject.

Development organizations may use any taxonomy to organize development issues.

3 Defining Subproject Types

Using controls in the Choose Iteration Type window, project team members may define the subproject type of every subproject defined in the DevPlan client.

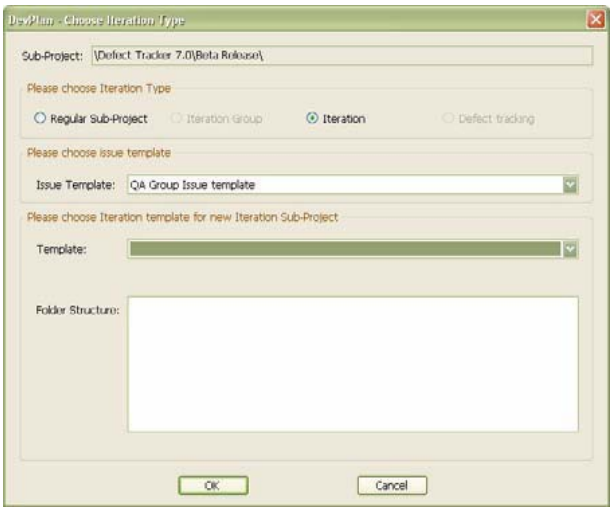


Figure 3-3: Choose Iteration Type Window

DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy.

Iterative Group Subproject (Milestone): An iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product.

Iterative Subproject (Sprint): An iterative subproject is a tool for organizing, managing, and tracking a set of implementation tasks within a set time period. The iterative subproject defines the tasks that must be completed to meet the goals of an iteration.

Defect Tracking Subproject:

Regular Subprojects:A regular subproject defines a distinct area of work within a project. Regular subprojects may be used to organize the work within an iterative subproject or within the project itself.

1Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command. The Subproject Information window appears.

The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2Click the Type ellipsis button in the General page.

The Choose Iteration Type window appears.

3Select an iteration type option:

DevSuite support four distinct types of subprojects. Each subproject type defines the relationship between that subproject and the other subprojects in the project hierarchy

- To define a regular subproject, select the Regular Subproject option button.
- To define an iteration group subproject, select the Iteration Group Subproject option button.
- To define an iteration subproject, select the Iteration Subproject option button.

- To define a defect tracking subproject, select the Defect Tracking Subproject option button.

4 Optional: If the subproject is an iteration group or iteration subproject, select an issue template in the Issue Template dropdown list.

The Issue Template dropdown list displays the issue templates that are applicable to the subproject.

5 Optional: If the subproject is an iteration subproject, select an iteration template in the Iteration Template dropdown list.

6 Select the OK button.

The Choose Iteration Type window closes.

4 Managing Iterative Group (Milestone) Subprojects

In DevSuite, an iterative group subproject is a tool for organizing, managing, and tracking the development tasks that define a project milestone such as the completion of a version or build of a product.

The iterative group subproject defines the tasks that must be completed to meet achieve a particular milestone. Every iterative group subproject is the parent of one or more child iterative subprojects. The tasks that comprise a iterative subproject are a subset of the tasks that define the parent iterative group subproject.

The status of iterative subprojects are indicated in the subproject tree list panel by one of three different iterative subproject icons:

All iterative group subprojects are identified in the subproject tree panel by the iterative group icon.

To add an iterative subproject:

1 Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command. The Subproject Information window appears.

The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2 Define general subproject properties in the General page.

General subproject properties include:

Title

Status

Priority

3 Define the planned time of the subproject.

Subproject planned time date properties include:

Start Date

Finish Date

Duration

4 Optional: To define subproject inheritance rules, select an option from the Inheritance dropdown list.

The Inheritance dropdown list displays two options: Just for this Subproject and the Enforce for all Child Subprojects options.:

Just for this Subproject

Enforce for all Child Subprojects

5 Optional: To define subproject notes, enter a brief note in the Note text field Click the Type ellipsis button in the General page.

The Choose Iteration Type window appears.

6 Select the Iteration Group Subproject option.:

7 Select an issue template in the Issue Template dropdown list.

The Issue Template dropdown list displays the issue templates that are applicable to the subproject.

5 Managing Iterative (Sprint) Subprojects

In DevSuite, an iterative subproject is a tool for organizing, managing, and tracking a set of implementation tasks within a set time period. The iterative subproject defines the tasks that must be completed to meet the goals of an iteration.

Every iterative subproject is the child of a parent iterative group subproject. The tasks that comprise a iterative subproject are a subset of the tasks that define the parent iterative group subproject.

The status of iterative subprojects are indicated in the subproject tree list panel by one of three different iterative subproject icons:

The yellow iterative subproject icon identifies a current iteration.

The green iterative subproject icon identifies a closed iteration.

The green iterative subproject icon identifies a future iteration.

Different terms may be used to refer to an iterative subproject depending on the development methodology used in a project.

Using controls in the Choose Iteration Type window, project team members may define the subproject type of every subproject defined in the DevPlan client.

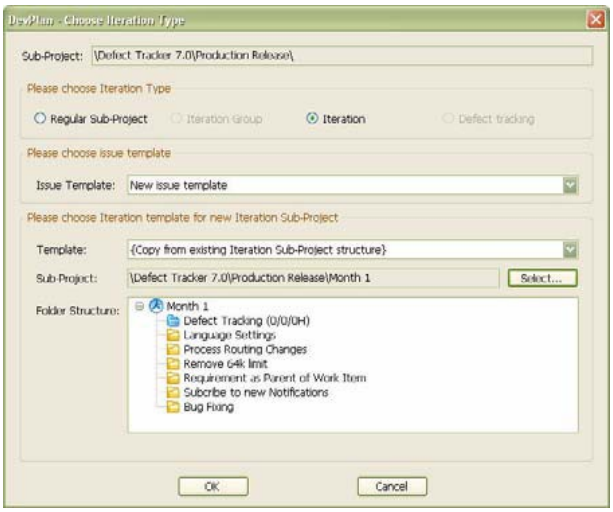


Figure 3-4: Choose Iteration Type Window

An iteration subproject is defined by its subproject type, an issue type, and an iteration template.

Issue Type

Iteration Template

To add an iterative subproject:

1 Right-click a subproject folder in the subproject tree list panel and select a command in the shortcut menu.

- To add the subproject as a sibling of the selected subproject, select the New Subproject as Sibling command.
- To add the subproject as the child of the selected subproject, select the New Subproject as Child command.

The Subproject Information window appears. The New Subproject page consists of eight tabbed pages: the General, Predecessors, Resources, Access Control, Issue Owner, Specification, Knowledge, DevTrack, and History pages.

2 Define general subproject properties in the General page.

General subproject properties include:

Title

Status

Priority

3 Define the planned time of the subproject.

Subproject planned time date properties include:

Start Date

Finish Date

Duration

4 Optional: To define subproject inheritance rules, select an option from the Inheritance dropdown list.

The Inheritance dropdown list displays two options: Just for this Subproject and the Enforce for all Child Subprojects options.:

Just for this Subproject

Enforce for all Child Subprojects

5 Optional: To define subproject notes, enter a brief note in the Note text field control.

6Click the Type ellipsis button in the General page.

The Choose Iteration Type window appears.

7Select the Iteration Subproject option.:

8Select an issue template in the Issue Template dropdown list.

The Issue Template dropdown list displays the issue templates that are applicable to the subproject.

9Select an iteration template in the Iteration Template dropdown list.

10Select the OK button.

The Choose Iteration Type window closes.

11Click the OK button.

Chapter 10- Knowledge Management (Knowledge View)

DevPlan provides project managers with two interfaces through which they may access and manage project documentation: the Knowledge tab for documents related to specific subprojects and the knowledge view for knowledge items in general.

In this chapter:

1 Understanding DevPlan Knowledge Management

In DevPlan, all control documents—business requirements, functional specifications, technical specifications, database schemas, and GUI design documents— are stored and managed in an integrated KnowledgeWise knowledge base.

The TechExcel KnowledgeWise distribution engine enables development organizations to enforce change management, security, and transparency to project deliverables and facilitates collaboration for distributed development teams.

TechExcel KnowledgeWise is a key component in the TechExcel DevSuite of application life cycle management tools. KnowledgeWise provides businesses with a single knowledge base through which they can manage and share information across DevPlan, DevTrack, DevTest, and DevSpec implementations.

DevPlan knowledge management tasks are carried out at two levels: the site level and the subproject level.

1.1 Subproject-level knowledge management

All subproject-level knowledge management tasks are conducted in the Knowledge tab of the subproject detail window of the DevPlan client. The Knowledge tab enables project managers to manage knowledge items related to a specific subproject. Subproject-level knowledge management tasks include:

- Adding and removing documents, HTML links, and topics to the knowledge base.
- Linking documents, HTML links, and topics stored in the knowledge base to subprojects.
- Checking out, checking in, locking, and unlocking documents linked to subprojects.

1.2 Site-level knowledge management

All site-level knowledge management tasks are conducted in the knowledge view of the DevPlan client. The knowledge view provides project managers with general access to the project knowledge base, enables project managers to organize documents, topics, and HTML links in the knowledge tree.

Site-level knowledge management tasks include:

- Defining the structure that is used to organize documents, HMTL links, and topics in the knowledge base.
- Adding and removing documents, HTML links, and topics to the knowledge base.
- Creating libraries of related knowledge for each knowledge item: multiple documents, HMTL links, or topics to each knowledge item.
- Checking out, checking in, locking, and unlocking any document stored in the knowledge base.

- Closing and reopening documents stored in the knowledge base.

1.3 Understanding the KnowledgeWise Knowledge Base

The TechExcel KnowledgeWise distribution engine enables development organizations to enforce change management, security, and transparency to project deliverables and facilitates collaboration for distributed development teams.

Documents, HTML links, and topics managed in the common knowledge base are accessible in multiple DevPlan, DevTrack, and DevPlan projects.

Figure 10-1: Common Knowledge Base for DevPlan, DevTrack, and DevTest

A centralized knowledge base enables businesses to increase efficiency, prevent the loss or misplacement of documents, track document histories, and reduce system and maintenance costs.

The knowledge base...

- Ensures that project control documents serve as a roadmap for the engineering team to implement n DevTrack.
- Facilitates the implementation of the product according to design parameters.
- Empowers QA teams to test according to design specifications. Mapping the design documents to the test cases and ensure that the application functions according to its design.
- Provides marketing, sales, and end user documentation teams with access to information about product features in development.
- Helps to measure if the implemented product matches the designed product.

1.4 Understanding Knowledge Items

In DevPlan, all documents, HTML links, topics, and note attachments are generally referred to*knowledge items*. Every knowledge item in an integrated site is managed in a centralized knowledge base.

Knowledge items fall into four categories: documents, HTML links, topics, and attachments.

- A**document**is any file that is saved in the knowledge base and includes all of the files generated during the planning process: customer requirements, functional specifications, technical specifications, database schemas, GUI designs, and so on. Documents may be in any file format: word processing documents, spreadsheets, image files, scripts.
- An**HTML link**is a URL to a web page. HTML links enable development organizations to create a library of project-related web sites and provide project members with easy access to reference information.
- A**knowledge topic**is a database record stored in the knowledge base. Businesses may use topics to define and manage a library of resolutions to common problems. Each topic consists of a description page, a resolution page, and a links page. Topics enable developers to save the time needed to resolve common development issues.
- An**attachment**is a file that has been linked to a development issue note in a DevTrack project. All attachments are stored in the Attachments root folder within the knowledge base.

1.5 Understanding Knowledge View Access Controls

All development tasks in a DevTrack project are protected by administrator-defined access controls. Project members may perform tasks in DevTrack projects based on the privileges granted to their account type in each project.

All DevPlan knowledge management tasks are defined in the DevTrack Admin client and derived from the privileges that are granted to a user in DevTrack projects.

DevPlan project managers may use the DevPlan client to manage project planning tasks for one DevTrack project at a time. The ability of DevPlan project managers to perform knowledge management tasks in the DevPlan client is based on the account type that is assigned to their user account in the current DevTrack project.

Can Publish and Modify Knowledge Item privilege: The Can Publish and Modify Knowledge Item privilege enables an account type to create and edit all knowledge items including documents, topics, HTML links, and attachments.

Can Modify Knowledge Structure privilege: The Can Modify Knowledge Structure privilege enables an account type to create, rename, and edit folders in the knowledge tree window.

Can Get Read Only Copy of File privilege: The Can Get Read Only Copy of File privilege enables an account type to open and view copies of knowledge items.

Can Get and Modify a File privilege: The Can Get and Modify a File privilege enables an account type to create and edit documents linked to development issues.

Can Locka File privilege: The Can Lock a File privilege enables an account type to place a lock on a document using the Lock command. Locked documents may not be checked out or edited until the lock is released using the Unlock command.

Can Unlock a File privilege: The Can Unlock a File privilege enables an account type to unlock locked documents.

Can Delete a File privilege: The Delete privilege enables an account type to delete documents from the knowledge base.

Can Close privilege: The Can Close privilege enables an account type to place a lock on a document using the Close command. Closed documents may not be checked out or edited until the lock is released using the Reopen command.

Can Reopen privilege: The Can Reopen privilege enables an account type to reopen closed knowledge items.

Can Get a Read-Only Copy of a Closed File privilege: The Can Get a Read-Only Copy of a Closed File privilege enables an account type to open an read-only copy of closed files.

1.6 Configuring Document Server Connections

DevPlan enables distributed development organizations to share knowledge items in a single KnowledgeWise knowledge base.Individual project members may choose how their client accesses, uploads, and downloads files to the KnowledgeWise knowledge base.

DevPlan connects to the knowledge base through a DevTrack Document Server. Project managers may define document downloading and uploading settings in the Knowledge Settings dialog box.

- The**Through Web Service (Internet) option**enables project members to upload and download knowledge items from the DevTrack Document Server from anywhere in the world through the Internet. The web server may limit the size of documents uploaded to the DevTrack Document Server to no greater than 4MB or 10MB depending on its configuration.
- The**Through Document Server Directly (Intranet) option**enables project members that have a network connection to access the integrated DevTrack Document Server directly to upload and download knowledge items.

To configure document server connections:

1Select DevPlan > Configuration in the Start Up menu.

The Define Web Service manager appears.

2Select a web service in the Web Service list.

3Click the Edit button.

The Edit Web Service dialog box appears.

4 Select the Document Server connection method.

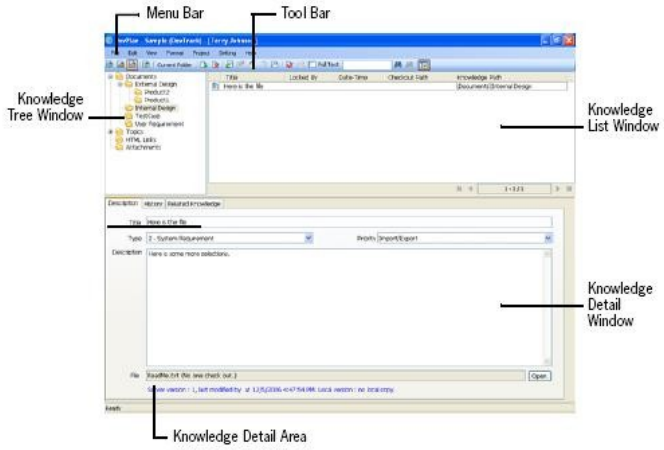
- To choose a connection through the Internet, select the Through Web Service (Internet) radio button.
- To choose a connection through an intranet, select the Through Document Server Directly (Intranet) option.

5 Click the OK button.

The Edit Web Service dialog box closes.

2 Managing the Knowledge Base

All site-level knowledge management tasks are conducted in the knowledge view of the DevPlan client. The knowledge view provides project managers with general access to the project knowledge base, enables project managers to organize documents, topics, and HTML links in the knowledge tree.



10-2: DevTrack knowledge view

The knowledge view is divided into three windows: the Knowledge tree window, the Knowledge list window, and the Knowledge detail window.

- The **Knowledge tree window** enables project members to organize and locate all project-related documents, topics, HTML links, and attachments.
- The **Knowledge list window** displays high-level information about multiple knowledge items in a tabular format of rows and intersecting columns.
- The **Knowledge detail window** displays detailed information about a single knowledge item.

Site-level knowledge management tasks include:

- Define the structure that is used to organize documents, HMTL links, and topics in the knowledge base.
- Add and remove documents, HTML links, and topics to the knowledge base.
- Create libraries of related knowledge for each knowledge item: multiple documents, HMTL links, or topics to each knowledge item.
- Check out, check in, lock, and unlock any document stored in the knowledge base. Figure Knowledge List Window Knowledge Detail Area Knowledge Tree Window Knowledge Detail Window Menu Bar Tool Bar

2.1 Understanding Knowledge View Tool Bar Buttons

The knowledge view tool bar displays multiple command buttons that enables project members to manage the knowledge items displayed in the Knowledge list window.

 Add New File

 Delete File

 Check Out

 Check In

 Lock

 Unlock

 Open

 Close

 Reopen

Most knowledge view commands are also accessible through the Knowledge list context menu. To access the knowledge list context menu, right-click the Knowledge list window.

2.2 Displaying or HIding the Knowledge Detail Window

The Knowledge detail window displays detailed information about a single knowledge item organized into tabbed pages. By default the Knowledge detail window is not displayed in the knowledge view of the DevPlan client.

To display or hide the Knowledge detail window, click the Knowledge Properties button in the tool bar.

The Knowledge Properties button is modal: 

- If the Knowledge detail window is displayed in knowledge view, clicking the button hides the window.
- If the Knowledge detail window is hidden in knowledge view, clicking the button displays the window.

2.3 Enabling Edit Mode in the Knowledge Detail Window

To define the detail pages displayed in the Knowledge detail window as editable or read-only, click the Edit Mode button in the tool bar.

The Edit Mode button is modal. 

- If the Knowledge detail window is editable in the DevPlan client, clicking the button makes all data-entry controls read-only.
- If the Knowledge detail window is read-only in the DevPlan client, clicking the button makes all data-entry controls editable.

2.4 Filtering Knowledge Items by Knowledge Folder

The Knowledge tree window organizes knowledge items into four root folders by knowledge items types: the Document

folder, the HTML Links folder, the Topics folder, and the Attachments folder.

Project managers may view knowledge items by selecting the appropriate knowledge item folder in the Knowledge tree window.

2.5 Displaying Child Folder Knowledge Items

The knowledge list window in the knowledge view displays high-level information about multiple knowledge items in a tabular format. Project members may filter the knowledge items displayed in the knowledge list by selecting a knowledge folder in the knowledge tree control.

By default the knowledge list displays only those knowledge items that are contained in the knowledge folder selected. The Show Knowledge for all Child Folder control enables project managers to view both the knowledge items that are contained in selected folder and knowledge items contained in child knowledge folders.

To display knowledge items contained in child folders, right click a folder in the knowledge tree control and select the Show Knowledge for all Child Folder control in the context menu.

2.6 Tracking Knowledge Item Histories

The History page provides project members with a read-only history of every change made to a knowledge item.

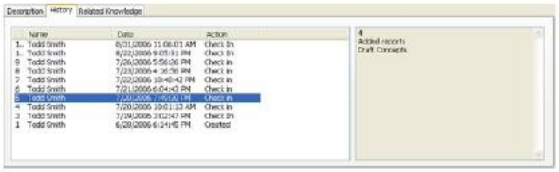


Figure 10-3: Knowledge Detail Window History Page

Every time a knowledge item is created or checked into the DevTrack knowledge view, the History page logs the changes made to the document.

The History page is divided into two areas: the History list and the Notes area:

The History list displays each change to the document in a tabular format. Each row represents a version of the knowledge item (document, topic, HTML link, or attachment) that was checked into the DevTrack system. For each version of a knowledge item, the History list shows the version number, the user name of the person who made the change, the time the change was made, and the action taken.

The Notes area displays any notes made by a project members when he or she makes changes to a document.

2.7 Updating Knowledge Item Details

Every knowledge item is defined by five basic knowledge item properties. Knowledge base properties define how the knowledge is identified in the knowledge base. The Description tab enables project members to view and update basic information about a knowledge item.

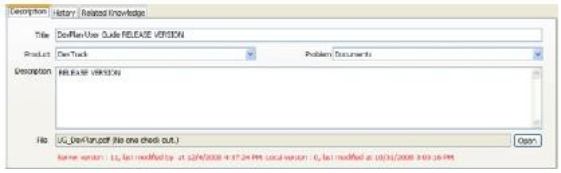


Figure 10-4: Description Tab in the Knowledge View

The basic information is the same for all knowledge item types. Each property is contained in a Description control.

- The Title field
- The Keyword field
- The File field
- The Type dropdown list
- The Priority dropdown list
- The Description field

The basic information is the same for all knowledge item types.

3 Organizing Knowledge Items in the Knowledge Base

The knowledge tree control in the knowledge tree window organizes knowledge items into a hierarchical structure of knowledge folders and user-defined knowledge subfolders.

Every knowledge item—documents, HTML links, topics, and attachments—is stored in one of four root knowledge folders based on their knowledge item type—the Document knowledge folder, the HTML Links knowledge folder, the Topics knowledge folder, or the Attachments knowledge folder.

Every root knowledge folder may contain multiple subfolders which, in turn, may contain addition sublevels of knowledge subfolders.

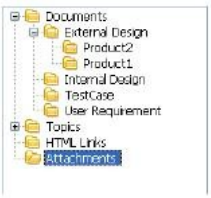


Figure 10-5: Tree Control in the Knowledge Tree Window

Project members may add, rename, and delete knowledge subfolders in the knowledge tree control of the knowledge tree window.

Knowledge subfolders enable project managers to create hierarchical structures for organizing documents, HMTL links, and topics within their respective knowledge root folder.

- The**Documents knowledge folder**is a general-purpose document repository. Project members may add to the Documents knowledge folder multiple subfolders to hold such project related documents as internal design documents, system requirements, and user specifications.
- The**Topics knowledge folders**is designed to enable project members to manage a knowledge base of problems and resolutions. Topics are special documents specifically designed to help project members build a*knowledge base*of problems and resolutions, or questions and answers. No file is stored in the knowledge base—all data is maintained in the database. Topics can help save time in resolving redundant issues. Each topic contains a description page, a resolution page, and a links page.
- The**HTML Links knowledge folder**contains HTML links that are relevant to the current project. This knowledge folder documents Web addresses, with titles, keywords, related products, and a description. The HTML Link knowledge folder enables project members to create a links library of project-related URLs. The knowledge view supports HTML and Web page tracking. Development issues can be linked with a dynamically changing Web site or page-based HTML document for easy reference and access.
- The**Attachments knowledge folder**contains all of the files that have been attached to development issues in DevTrack projects. Project members cannot create subfolders under the Attachments knowledge folder; all attachment files are saved in the same knowledge folder.

To edit the Document knowledge folder project members must be granted the Can Modify Knowledge Structure privilege by a DevTrack project administrator.

Note: Knowledge item root folders—the Document knowledge folder, Topic knowledge folder, HTML links knowledge folder, and Attachment knowledge folder— may be renamed, but cannot be deleted.

3.1 Adding Knowledge Subfolders

The knowledge tree control in the knowledge tree window organizes knowledge items into a hierarchical structure of knowledge folders and user-defined knowledge subfolders.

To create knowledge subfolders in the Knowledge tree window, project members must belong to an account that has been granted the Can Modify Knowledge Structure privilege by a DevTrack project administrator.

To add a knowledge subfolder:

1. Right-click a knowledge root folder or knowledge subfolder in the knowledge tree control and select the Add a New Folder command from the context menu.

   The folder appears in the Knowledge tree window.

2. Define the name of the subfolder.

3.2 Deleting Knowledge Folders

The knowledge tree control in the knowledge tree window organizes knowledge items into a hierarchical structure of knowledge folders and user-defined knowledge subfolders.

Project managers may delete knowledge subfolders and every knowledge item or knowledge subfolder contained in that knowledge folder in the knowledge tree control of the knowledge tree window.

Knowledge subfolders may*not*be deleted if they contain knowledge items that are referenced—*linked to*—other knowledge items in the knowledge base. For more information on knowledge item linking see “Managing Knowledge Item Linking”.

Note: Knowledge item root folders—the Document knowledge folder, Topic knowledge folder, HTML links knowledge folder, and Attachment knowledge folder— may be renamed, but cannot be deleted.

To delete the knowledge subfolders a project manager must belong to an account type that has been granted Can Modify Knowledge Structure privilege by a DevTrack project administrator.

To delete a knowledge folder:

1. Right-click a knowledge subfolder in the knowledge tree control of the knowledge tree window, and select the Delete the Folder command in the context menu.

   A confirmation dialog box appears.

2. Click the Yes button. The knowledge folder disappears from the knowledge tree control

3.3 Renaming Knowledge Folders

Project members can use the Rename command to change the title of knowledge folders in the Knowledge tree window.

To edit the knowledge folders in the Knowledge tree window, project members must belong to an account that has been granted the Can Modify Knowledge Structure privilege by a DevTrack project administrator.

To rename a knowledge folder:

1. Right-click a knowledge folder in the knowledge tree control of the knowledge tree window and select the Rename command in the context menu.

2. Define the name of the knowledge folder.

   The knowledge folder is renamed in Knowledge tree menu.

4 Managing Documents in the Knowledge View

A**document**is any file that is saved in the knowledge base and includes all of the files generated during the planning process: customer requirements, functional specifications, technical specifications, database schemas, GUI designs, and so on. Documents may be in any file format: word processing documents, spreadsheets, image files, scripts.

The knowledge view tool bar displays multiple command buttons that enables project members to manage the documents displayed in the knowledge list window.

	Add New File
	Delete File
	Check Out
	Check In
	Lock
	Unlock
	Open
	Close
	Reopen

4.1 Adding Documents in the Knowledge View

To add a document:

1 Select the Add New File command. 

Project managers may invoke the Add New File command by two methods:

- Click the Add New File button in the tool bar.
- Right-click in the Knowledge list window and select the Add New File command in the context menu. The Add New File dialog box appears.

2 Locate the file to be added to the knowledge base.

To locate a file, select the Ellipsis button and browse for the file in the file browser.

3 Define the title of the document.

4 Select an option from the Type dropdown list.

The Type dropdown list displays administrator-defined document types such as database designs, system requirements, and technical specifications.

5 Select an option from the Priority dropdown list.

The Priority dropdown list displays an administrator-defined list of knowledge item priorities that are defined in the administrator-client of the integrated TechExcel DevTrack project.

6 Enter a brief description of the topic in the Description control.

7 Click the OK button.

4.2 Deleting Documents in the Knowledge View

To delete a document:

1 Select a document in the Knowledge list window.

2 Select the Delete command. 

Project managers may invoke the Add New File command by two methods:

- Click the Delete File button in the tool bar.
- Right-click in the Knowledge list window and select the Delete File command in the context menu.

A confirmation dialog box appears.

3 Click the Yes button.

4.3 Opening Local Versions of Documents

Project members may access two versions of documents through the DevPlan client—the server version and the local version.

A local version of a document is created whenever a project member checks out the server version from the knowledge base. For more information see “Managing Document Version Control”.

If no local copy of a document exists, the Open Local File control is unavailable.

To open a local version of a document:

1 Select a document in the knowledge list window.

2 Select the Open Local File command. 

Project managers may invoke the Open Local File command by two methods:

- Click the Open Local File button in the tool bar.
- Right-click in the Knowledge list window and select the Open Local File command in the context menu.

The Open dialog box appears.

3 Select the Open This File Now check box.

4 Click the OK button.

The local copy of the document opens.

4.4 Closing Documents

The Close command enables project managers to place a “lock” on a document that prevents other project members from updating the server version of that document.

Closing a document is akin to “publishing” the document—the document is declared complete and closed to further revisions. Closed documents cannot be edited or checked out until the document is reopened using the Reopen command.

Closed documents cannot be viewed unless a project member belongs to an account type that has been granted a special privilege to view read-only copies of closed documents (the Can Get a Read-Only Copy of a Closed File privilege).

To close a document the project manager must belong to an account type that has been granted the Can Close a File privilege by a DevTrack project administrator. For more information see “Understanding Knowledge View Access Controls” on page 111.

To close a document:

1 Select a document in the Knowledge list window.

2 Select the Close command.

Project managers may invoke the Close command by two methods:

• Click the Close button in the tool bar. 

• Right-click in the Knowledge list window and select the Close command in the context menu. 

The document is closed and displays the Closed icon in the Knowledge list window.

4.5 Reopening Documents

The Reopen command enables project managers to release the “lock” that is placed on a document when that document is closed using the Close command.

Closing a document is akin to “publishing” the document—the document is declared complete and closed to further revisions. Closed documents cannot be edited or checked out until the document is reopened using the Reopen command.

To reopen a document the project manager must belong to an account type that has been granted the Can Reopen a File privilege by a DevTrack project administrator. For more information see “Understanding Knowledge View Access Controls”.

To reopen a document:

1 Select a document in the Knowledge list window.

2 Select the Reopen command.

Project managers may invoke the Reopen command by two methods:

• Click the Reopen button in the tool bar. 

• Right-click in the Knowledge list window and select the Reopen command in the context menu.

The document is reopened.

5 Managing HTML Links in the Knowledge View

An **HTML link** is a URL to a web page. HTML links enable development organizations to create a library of project-related web sites and provide project members with easy access to reference information.

The knowledge view tool bar displays multiple command buttons that enables project members to manage the HTML links displayed in the knowledge list window.

 Add New Link

 Delete Link

HTML link management tasks include:

• Adding HTML Links in the Knowledge View
• Deleting HTML Links in the Knowledge View
• Browsing HTML Links in the Knowledge View

5.1 Adding HTML Links in the Knowledge View

To add a HTML link:

1 Select the Add New File command.

Project managers may invoke the Add New File command by two methods:

- Click the Add New Link button in the tool bar.
- Right-click in the Knowledge list window and select the Add New Link command in the context menu.

The Add New Link dialog box appears.

2 Locate the file to be added to the knowledge base.

To locate a file, select the Ellipsis button and browse for the file in the file browser.

3 Define the title of the HTML link.

4 Define one or more keywords in the Keyword control.

The user-defined keywords enable users to locate the topic using keyword searches.

Keywords are words that describe a concept found in a document or that appear with special frequency in that document or field. Project members may define multiple keywords for every document they save in the knowledge base providing the metadata that enables project members to locate that information.

5 Enter the URL in the File control.

6 Enter a brief description of the HTML link in the Description control.

7 Click the OK button.

5.2 Deleting HTML Links in the Knowledge View

To delete a HTML link:

1 Select a HTML link in the knowledge list window.

2 Select the Delete Link command.

Project managers may invoke the Delete Link command by two methods:

- Click the Delete Link button in the tool bar.
- Right-click in the Knowledge list window and select the Delete Link command in the context menu.

A confirmation dialog box appears.

3 Click the Yes button.

The HMTL link is removed from the knowledge list window.

5.3 Browsing HTML Links in the Knowledge View

To browse a HTML link:

1 Select a HTML link in the knowledge list window.

2 Right-click in the knowledge list window and select the Browse command in the context menu.

The web page opens in the default web browser.

6 Managing Topics in the Knowledge View

A **knowledge topic** is a database record stored and managed in the knowledge base. Businesses may use topics to define and manage a library of resolutions to common problems, answers to FAQs, or other information that must be accessed frequently. Each knowledge topic may, in turn, be linked to multiple documents, HMTL links, or other topics. A topic consists of a description page, a resolution page, and a links page. The knowledge view tool bar displays multiple

command buttons that enables project members to manage the topics displayed in the knowledge list window.

- Add New Topic
- Delete Topic

6.1 Adding Topics in the Knowledge View

Project managers may add topics to the knowledge base and link existing document, HTML links, or topics using controls in the Knowledge tab of the subproject detail window or the knowledge view.

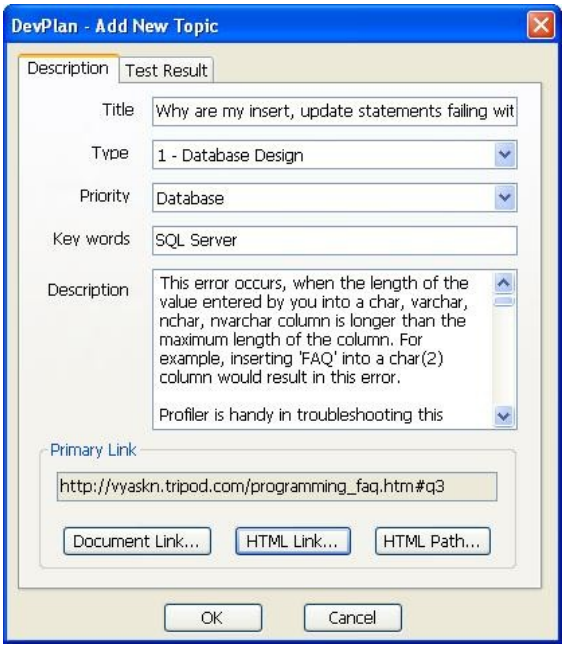


Figure 8-6: Add New Topic Manager**.**

To add a topic (knowledge view):

1Select the Topic root folder or a topic subfolder in the knowledge tree window of the DevPlan knowledge view.

Project managers may invoke the Add New Topic command by two methods:

- Click the Add New File button in the tool bar.
- Right-click in the Knowledge list window and select the Add New Topic command in the context menu.

The Add New Topic manager appears.

2Define the title of the topic in the Title control.

The user-defined title identifies the topic in the knowledge base and may be used to query for the record. The title should be descriptive and contain one or more keywords.

3Select an option from the Type dropdown list.

The Type dropdown list displays administrator-defined document types such as database designs, system requirements, and technical specifications.

4Select an option from the Priority dropdown list.

The Priority dropdown list displays an administrator-defined list of knowledge item priorities that are defined in the administrator-client of the integrated TechExcel DevTrack project.

5Define identifying keywords in the Keyword control.

The user-defined keywords enable users to locate the topic using keyword searches.

Keywordsare words that describe a concept found in a document or that appear with special frequency in that document or field. Project members may define multiple keywords for every document they save in the knowledge base providing the metadata that enables project members to locate that information.

Chapter 11- Understanding Reports (Report View)

Wiki Summary.

1 Understanding Report View Layout

Understanding DevPlan Reports

The DevPlan report view provides project managers with a centralized reporting interface for managing all project reports and business intelligence. Using point-and-click tools, project managers may define customized reports that enable them to quickly and accurately assess the value of an activity in relation to the overall project.

The report view consists of two areas the Report tree window and the Report window.

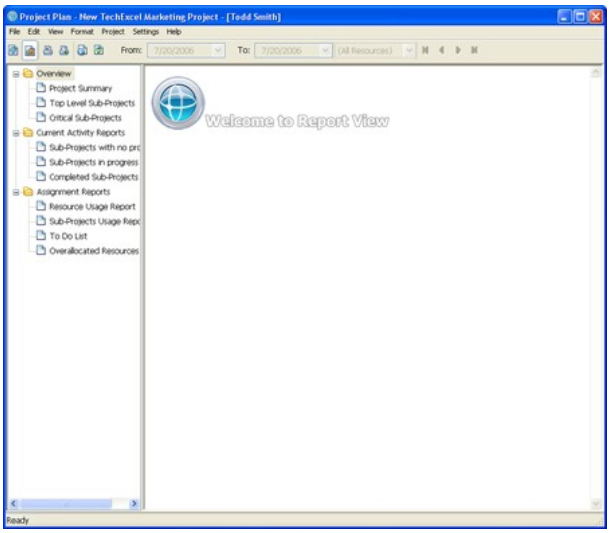


Figure 9-1: Report View

- Menu bar
- Tool bar
- Subproject tree window
- Report window

2 Managing Project Summary Reports

Project Summary reports show high-level information about the complete project from its beginning to the current date. Summary data is provided for dates, durations, work, subproject statues, and resource statues.

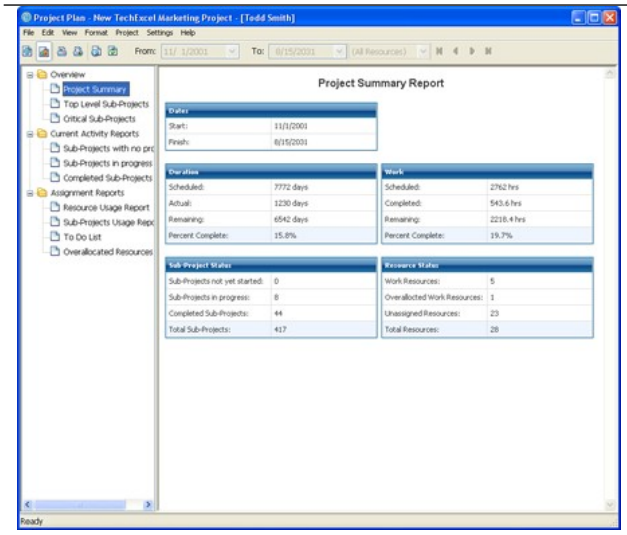


Figure 9-2: Project Summary Report

- Dates
- Durations
- Work
- Subproject Statues
- Resource Statues

2.1 Defining General Report Properties

To define general report properties:

1 Select a report in the Report tree window.

2 Click the Properties button in the tool bar.

The Properties manager appears.

3 Select the General tab.

4 Define the title.

5 Define the subtitle.

6 Click the OK button.

The Properties manager closes.

3 Managing Top-level Subprojects Reports

Top-level subprojects reports show high-level information about the top-tier of subprojects in a tabular format. Each row represents a level one subproject. Each column a subproject property.

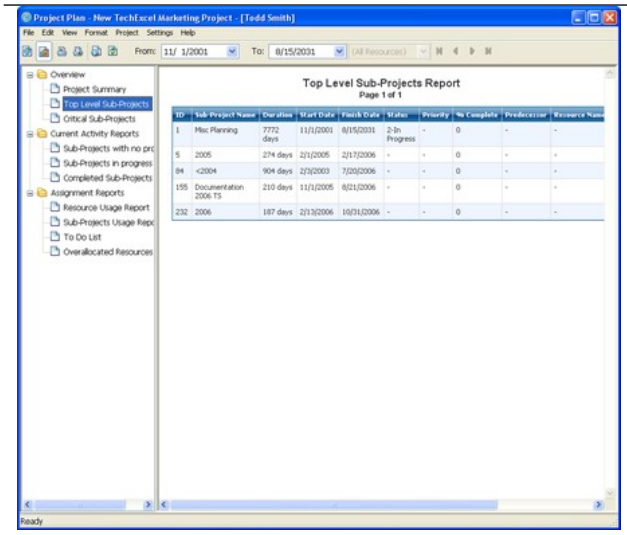


Figure 9-3: Top-level Subprojects Report

The columns displayed in the report are configurable. The ID, Subproject Name and Duration columns are mandatory.

- ID
- Sub-Project Name
- Duration
- Start Date
- Finish Date
- Status
- Priority
- % Complete
- Predecessor
- Resource Name
- Resource ID
- Resource Initial

3.1 Defining General Report Properties

To define general report properties:

1 Select a report in the Report tree window.

2 Click the Properties button in the tool bar.

The Properties manager appears.

3 Select the General tab.

4 Define the title.

5 Define the subtitle.

6 Select an option from the Order By dropdown list.

7 Select an option from the Sort By dropdown list.

The Sort By dropdown list displays two options.

- To sort data, select the Ascending Order command in the Sort By dropdown list.
- To sort data, select the Descending Order command in the Sort By dropdown list.

8 Define the number of rows per page.

9 Click the OK button.

The Properties manager closes.

3.2 Defining Reporting Fields

To define reporting fields:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Fields tab.
4. Add or remove subproject properties to the report.
5. To add subproject properties, select one or more properties in the Available Fields list and click the Right Arrow button.
6. To remove subproject properties, select one or more properties in the Selected Fields list b and click the Left Arrow button.
7. Click the OK button.

   The Properties manager closes.

3.3 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.
3. Select an end date in the To control in the tool bar.

4 Managing Critical Subprojects Reports

Critical subproject reports show high-level information about subprojects that have shown insignificant progress in a tabular format. Each row represents a subproject. Each column displays a subproject property.

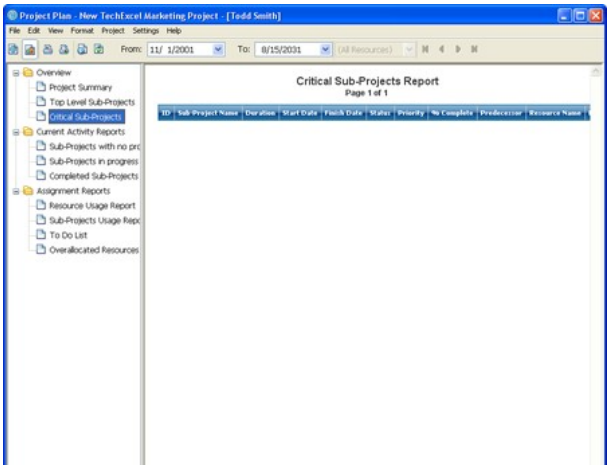


Figure 9-4: Resource Usage Report

The columns displayed in the report are configurable. The ID, Subproject Name and Duration columns are mandatory.

- ID

- Sub-Project Name
- Duration
- Start Date
- Finish Date
- Status
- Priority
- % Complete
- Predecessor
- Resource Name
- Resource ID
- Resource Initial

4.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Select an option from the Order By dropdown list.
7. Select an option from the Sort By dropdown list.

   The Sort By dropdown list displays two options.

   - To sort data, select the Ascending Order command in the Sort By dropdown list.
   - To sort data, select the Descending Order command in the Sort By dropdown list.
8. Define the number of rows per page.
9. Click the OK button.

   The Properties manager closes.

4.2 Defining Reporting Fields

To define reporting fields:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Fields tab.
4. Add or remove subproject properties to the report.

- To add subproject properties, select one or more properties in the Available Fields list and click the Right Arrow button.
- To remove subproject properties, select one or more properties in the Selected Fields list and click the Left Arrow button.

5 Click the OK button.

The Properties manager closes.

4.3 Defining Reporting Dates

To define reporting dates:

1 Select a report in the Report tree window.

2 Select a start date in the From control in the tool bar.

3 Select an end date in the To control in the tool bar.

5 Managing Subprojects with No Progress Reports

Subprojects with No Progress reports show high-level information about subprojects that have shown insignificant progress in a tabular format. Each row represents a subproject. Each column displays a subproject property.

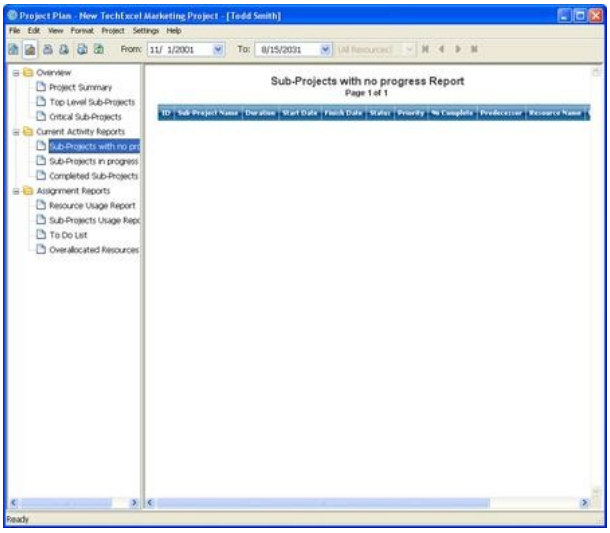


Figure 9-5: Subprojects with No Progress Report

The columns displayed in the report are configurable. The ID, Subproject Name and Duration columns are mandatory.

- ID
- Sub-Project Name
- Duration
- Start Date
- Finish Date
- Status
- Priority
- % Complete
- Predecessor
- Resource Name
- Resource ID
- Resource Initial

5.1 Defining General Report Properties

To define general report properties:

1 Select a report in the Report tree window.

2 Click the Properties button in the tool bar.

The Properties manager appears.

3 Select the General tab.

4 Define the title

5 Define the subtitle.

6 Select an option from the Order By dropdown list.

7 Select an option from the Sort By dropdown list.

The Sort By dropdown list displays two options.

- To sort data, select the Ascending Order command in the Sort By dropdown list.
- To sort data, select the Descending Order command in the Sort By dropdown list.

8 Define the number of rows per page.

9 Click the OK button.

The Properties manager closes.

5.2 Defining Reporting Fields

To define reporting fields:

1 Select a report in the Report tree window.

2 Click the Properties button in the tool bar.

The Properties manager appears.

3 Select the Fields tab.

4 Add or remove subproject properties to the report.

- To add subproject properties, select one or more properties in the Available Fields list and click the Right Arrow button.

- To remove subproject properties, select one or more properties in the Selected Fields list and click the Left Arrow button.

5 Click the OK button.

The Properties manager closes.

5.3 Defining Subprojects Not Yet Started

To define subprojects not yet started:

1 Select a report in the Report tree window.

2 Click the Properties button in the tool bar.

The Properties manager appears.

3 Select the Define Completed Subprojects tab.

4 Select one or more subproject statuses in the Subproject Status area.

The Subproject Status area displays four options:

- -
- Not Started
- In Progress
- Completed

5 Define the range of completion.

- To define the bottom range, select a percentage from the left dropdown list.
- To define the high range, select a percentage from the right dropdown list.

6 Click the OK button.

5.4 Defining Reporting Dates

To define reporting dates:

1 Select a report in the Report tree window.

2 Select a start date in the From control in the tool bar.

3 Select an end date in the To control in the tool bar.

6 Managing Subprojects in Progress Reports

Subprojects in Progress reports show high-level information about subprojects that have shown insignificant progress in a tabular format. Each row represents a subproject. Each column displays a subproject property.

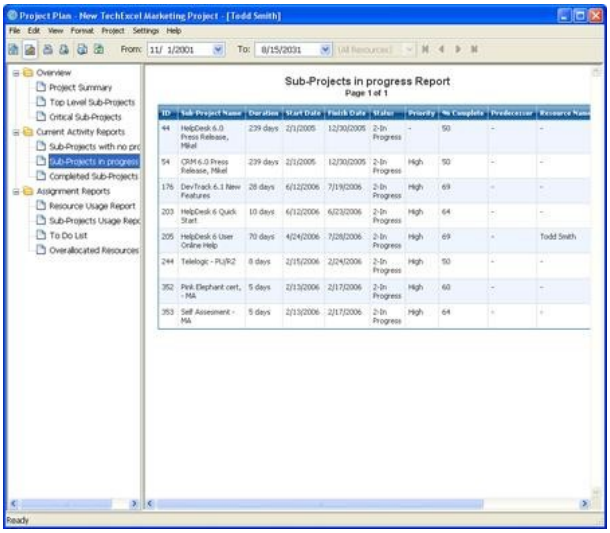


Figure 9-6: Subprojects in Progress Report

The columns displayed in the report are configurable. The ID, Subproject Name and Duration columns are mandatory.

- ID
- Sub-Project Name
- Duration
- Start Date
- Finish Date
- Status
- Priority
- % Complete
- Predecessor
- Resource Name
- Resource ID

- Resource Initial

6.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Select an option from the Order By dropdown list.
7. Select an option from the Sort By dropdown list.

   The Sort By dropdown list displays two options.

   - To sort data, select the Ascending Order command in the Sort By dropdown list.
   - To sort data, select the Descending Order command in the Sort By dropdown list.
8. Define the number of rows per page.
9. Click the OK button.

   The Properties manager closes.

6.2 Defining Subprojects In Progress

To define subprojects in progress:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Define Completed Subprojects tab.
4. Select one or more subproject statuses in the Subproject Status area.

   The Subproject Status area displays four options:
   - -
   - Not Started
   - In Progress
   - Completed
5. Define the range of completion.

   - To define the bottom range, select a percentage from the left dropdown list.
   - To define the high range, select a percentage from the right dropdown list.
6. Click the OK button.

   The Properties manager closes.

6.3 Defining Reporting Fields

To define reporting fields:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Fields tab.
4. Add or remove subproject properties to the report.
   - To add subproject properties, select one or more properties in the Available Fields list and click the Right Arrow button.
   - To remove subproject properties, select one or more properties in the Selected Fields list and click the Left Arrow button.
5. Click the OK button.

   The Properties manager closes.

6.4 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.
3. Select an end date in the To control in the tool bar.

7 Managing Completed Subprojects Reports

Complete subproject reports show all of the subproject that are completed in a DevPlan project in a tabular format. Each row represents a completed subproject and each column a subproject property.

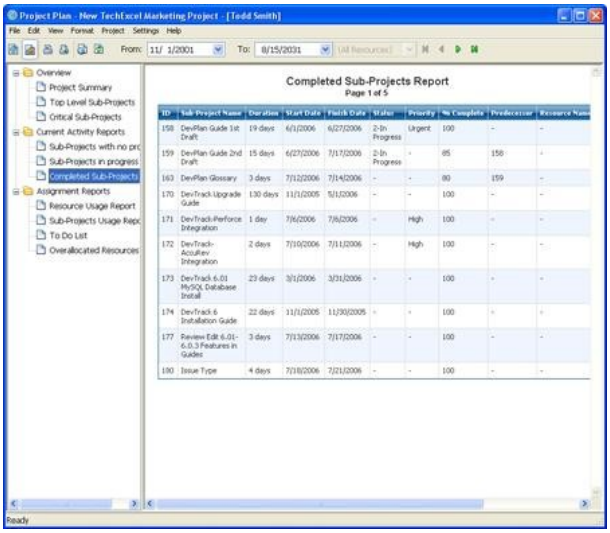


Figure 9-7: Completed Subproject Report

The columns displayed in the report are configurable. The ID, Subproject Name and Duration columns are mandatory.

- ID
- Sub-Project Name
- Duration

- Start Date
- Finish Date
- Status
- Priority
- % Complete
- Predecessor
- Resource Name
- Resource ID
- Resource Initial

7.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Select an option from the Order By dropdown list.
7. Select an option from the Sort By dropdown list.

   The Sort By dropdown list displays two options.

   - To sort data, select the Ascending Order command in the Sort By dropdown list.
   - To sort data, select the Descending Order command in the Sort By dropdown list.
8. Define the number of rows per page.
9. Click the OK button.

   The Properties manager closes.

7.2 Defining Reporting Fields

To define reporting fields:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Fields tab.
4. Add or remove subproject properties to the report.
5. To add subproject properties, select one or more properties in the Available Fields list and click the Right Arrow button.
6. To remove subproject properties, select one or more properties in the Selected Fields list and click the Left Arrow button.
7. Click the OK button.

   The Properties manager closes.

7.3 Defining Completed Subprojects

To define completed subprojects:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the Define Completed Subprojects tab.
4. Select one or more subproject statuses in the Subproject Status area.

   The Subproject Status area displays four options:
   - -
   - Not Started
   - In Progress
   - Completed
5. Define the range of completion.

   - To define the bottom range, select a percentage from the left dropdown list.
   - To define the high range, select a percentage from the right dropdown list.
6. Click the OK button.

   The Properties manager closes.

7.4 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.
3. Select an end date in the To control in the tool bar.

8 Managing Resource Usage Reports

Resource usage reports show high-level information which resources are working in which subprojects in a tabular format. Each row represents a subproject. Each column displays a subproject property.

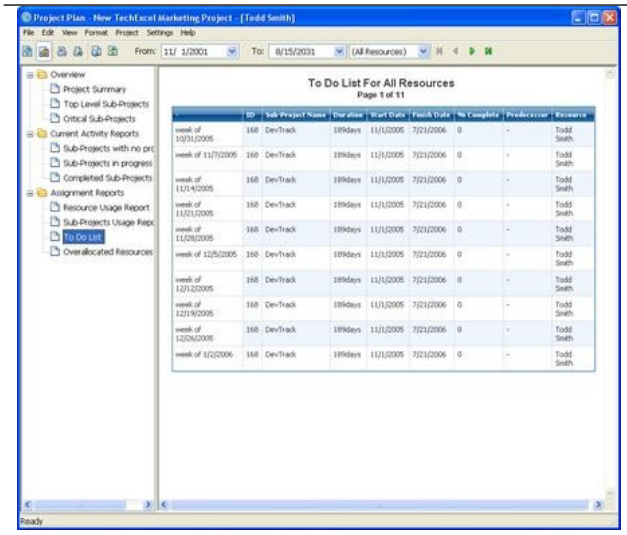


Figure 9-8: Resource Usage Report

8.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Define the number of rows per page.
7. Click the OK button.

   The Properties manager closes.

8.2 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.

9 Managing Subprojects Usage Reports

Subproject usage reports show high-level information which resources are working in which subprojects in a tabular format. Each row represents a subproject. Each column displays a subproject property.

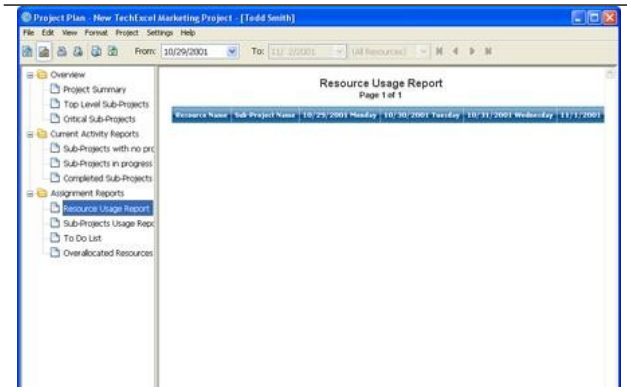


Figure 9-9: Subproject Usage Report

9.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Select an option from the Order By dropdown list.
7. Select an option from the Sort By dropdown list.

   The Sort By dropdown list displays two options.

   - To sort data, select the Ascending Order command in the Sort By dropdown list.
   - To sort data, select the Descending Order command in the Sort By dropdown list.
8. Define the number of rows per page.
9. Click the OK button.

   The Properties manager closes.

9.2 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.

10 Managing To Do List Reports

To Do List reports show the work that needs to be done for each subproject by week. Project managers may choose to display the work assigned to all resources, the work that is currently unassigned, or the work assigned to a specific resource.

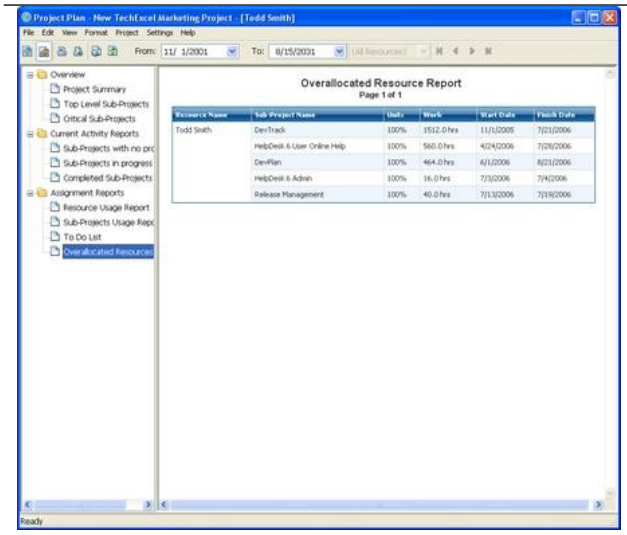


Figure 9-10: To Do List Report

10.1 Defining General Report Properties

To define general report properties:

1. Select a report in the Report tree window.
2. Click the Properties button in the tool bar.

   The Properties manager appears.
3. Select the General tab.
4. Define the title
5. Define the subtitle.
6. Define the number of rows per page.
7. Click the OK button.

   The Properties manager closes.

10.2 Defining Reporting Dates

To define reporting dates:

1. Select a report in the Report tree window.
2. Select a start date in the From control in the tool bar.
3. Select an end date in the To control in the tool bar.