

Using Confluence for Project Portfolio Management at New York University

What is Project Portfolio Management?

analyzing and collectively managing a group of current or proposed projects based on numerous key characteristics.

--Wikipedia, "Project Portfolio Management," 11/13, 2008

Who Does Project Portfolio Management?

Leadership Team for Academic Technology @ NYU

- .edu Leadership team
- Digital Library Technology Services
- ITS - Faculty Technology Services
- ITS - eServices (Apps & Systems)
- ITS - Student Technology Services

What Do We Do?

- Evaluate potential & current projects
- Prioritize
- Allocate resources
- Review project status, problems
- Resolve issues
- Report down, up and out

Need processes and tools to do so

How Would a Portfolio Management Tool Help?

- List all current and proposed projects
- List (un)available resources
- Run staffing / cost scenarios for proposed projects
- Send notifications on project status / problems
- Run reports on various criteria in various ways

We Don't Have a Tool.

- Wiki for documentation
- Home-grown PM tool ONLY for project status
- Spreadsheets for staffing scenarios & tracking
- Individual's choice for PM support

No way for Leadership Team to see the whole picture

How Do We Evaluate and Prioritize?

- Is there demand?
- IT viability?
- Strategic alignment?
- Available resources?
- Costs clear?

Project Proposal Process

- Anyone can submit a project proposal
- Fill out template in wiki
- Project cycle:
 - 3 semesters/year: Fall, Spr, Sum
 - Proposals 2 months before semester start

Project Proposal - .edu - Confluence

https://jira.nyu.edu/confluence/display/EDU/Project+Pr

Most Visited MeetingMaker Facebook Jira NYUAdminSvcs WorldCat iGoogle Gmail FryeBB Chronicle RefWorks

Dashboard > .edu > Home > .edu Project Proposals > Project Proposal

Space Jennifer Vinopal Search

Project Proposal

Edit Add Tools

Added by [Barbra Mack](#), last edited by [Barbra Mack](#) on Nov 04, 2008 ([view change](#))

Request Summary	
Proposed By (client/staff member requesting the project):	Department:
Submitted By (the staff member submitting this proposal):	Department:
Requested Completion Date:	Reason for Requested Date:
Proposal Priority:	Explanation for Priority:

Project Proposal Description:
[general description of the proposal and its goals]

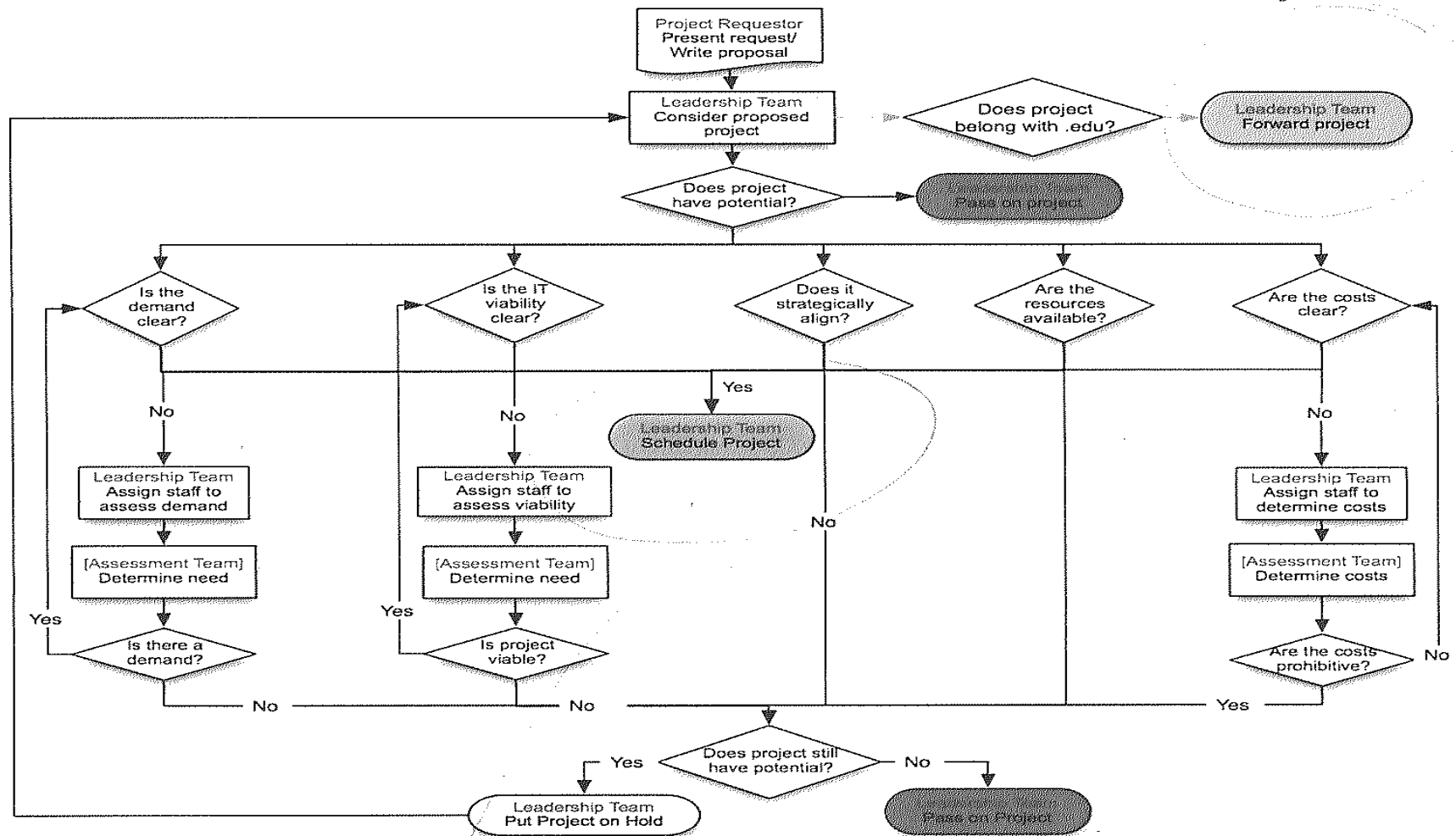
Needs Statement:
[Why do we need to do this project? Clearly articulate the technical, community, political, and/or economic factors that would motivate the project.]

Perceived Risks/Challenges:
[Risks and challenges could be wide ranging. Some example include: no funding for the size of project, lack of required staff, lack of required skillset within staff, doesn't fit within .edu's services, risky IT viability (e.g., not enterprise scalable), etc.]

Proposed Deliverables:
[In this area identify the type of work that would be needed to complete this project. Just a bulleted list of tasks is sufficient if your time is limited.]

Leadership Team's Assessment:

Project Evaluation by Leadership



Project Approval by Leadership

- 1 month before semester start
- Notify project managers and project team members
- Project Snapshot into wiki
 - available to project staff
 - available to management
 - document milestones, major decisions

Project Snapshot in Wiki

The screenshot shows a web browser window displaying a Confluence wiki page. The browser's address bar shows the URL: <https://jira.nyu.edu:8443/confluence/display/EDU/.edu>. The page title is ".edu Project Snapshot Template".

At the top of the page, there is a navigation bar with "Dashboard > .edu > Home > .edu Project Snapshot Template" and a search box. Below the title, there are links for "Edit", "Add", and "Tools".

The page content includes:

- A note: "Added by [Gary Shawver](#), last edited by [Robert Brill](#) on Oct 30, 2008 ([view change](#))"
- A section "On This Page:" containing a list of links:
 - [Project Summary](#)
 - [General Information](#)
 - [Objective](#)
 - [Project Description](#)
 - [Business Need / Problem](#)
 - [Project Methodology](#)
 - [Deliverables](#)
 - [Project Files and Documents](#)
 - [Project Activities](#)
 - [Action Items/ Issues](#)
 - [Meeting Notes](#)
 - [Project Team](#)
 - [Project and Team Communications](#)

- A section titled "Project Summary" with a horizontal line below it.
- A section titled "General Information" containing a table:

Project Title:		Project ID:	ITSXXXX
Completion Date:		Strategic Alignment:	
Sponsoring Organization:	.edu	Sponsor:	
Project Manager:		Document Version:	1.0
- A section titled "Objective" with the text: "[WHAT do you want to accomplish, and WHEN? This could be a one-sentence SMART (Specific, Measurable, Applicable, Realistic, Time-bound) goal that focuses on a measurable, clear objective that can be accomplished by the end of the semester]"
- A section titled "Project Description" (partially visible).

The browser's status bar at the bottom shows "Done" on the left and "jira.nyu.edu:8443" and "Open Notebook zotero" on the right.

Conclusion 1

Wiki:

- good for linear documentation
- static data (can't repurpose)
- limited layout capabilities
- bad for helping PM organize and plan
- bad for reporting

Home-Grown tool: unsatisfactory

Conclusion 2

- Currently seeking PM tool to handle:
 - Project Portfolio Management
 - Project Management
 - Reporting

Conclusion 3

Project Lifecycle Process in development:

- proposal
- evaluation
- initiation
- project management
- portfolio management
- transition to production service