

**PBworks Business Edition**  
Using PBworks for Collaborative  
Project Management

WHITE PAPER

**PBWORKS**

# PBworks Business Edition

## Overview

One of the most common uses for PBworks is collaborative project management. After all, project management is all about collaboration. And unlike traditional project management software (such as Microsoft Project) which centralizes the work on a single project manager and forces you into a certain (largely inflexible) process, PBworks lets you manage your projects collaboratively, in a way that fits your existing business processes.

Of course, while flexibility is great, you probably don't want to build your project management process from scratch. This white paper describes how you can use PBworks' workspace template system to construct a simple yet effective collaborative project management system that is easy for you to modify and customize to your own organization.

## What Is Collaborative Project Management?

Traditional project management tools have always separated the "management" from the actual work itself. Tools such as Microsoft Project encourage a process by which a single project manager acts as a central information hub and task manager. Often times, the project manager will gather feedback from the team members doing the work by emailing to request status reports, or even walking over to the person in question for a face-to-face conversation. While it is certainly possible to publish the project plans, it is generally a one-way street. All other team members are read-only consumers of the plan.

In contrast, collaborative project management takes the traditional elements of project management (tasks, milestones, status updates) and makes them available to all the members of the team. This distributed approach allows everyone—including clients, partners, and vendors—to contribute to managing the project, and relieves the often overwhelming load on the designated project manager.

PBworks Business Edition takes this approach a step further by integrating a project management platform with a collaboration platform for creating, sharing, and editing content and final deliverables. Rather than consigning project management to a separate application, tasks and milestones are an integral part of a broad collaboration platform. For example, a web design firm that needs its client to review website design concepts can assign a task to the client, and when the client drills down into the task, he moves seamlessly to a wiki page containing comps where he can add his comments, edit the copy, and otherwise work hand-in-hand with the design team.

As a result, project management is an organic result of doing the work, rather than a bolted-on afterthought or overlay.

## How PBworks Business Edition Works

In addition to the standard elements of the PBworks collaboration platform, such as wiki-style collaborative content creation and document management, PBworks Business Edition includes three critical features that make it ideal for project-oriented agencies and consultancies:

- 1. Firm-wide Networks**
- 2. Tasks and Milestones**
- 3. Workspace Templates**

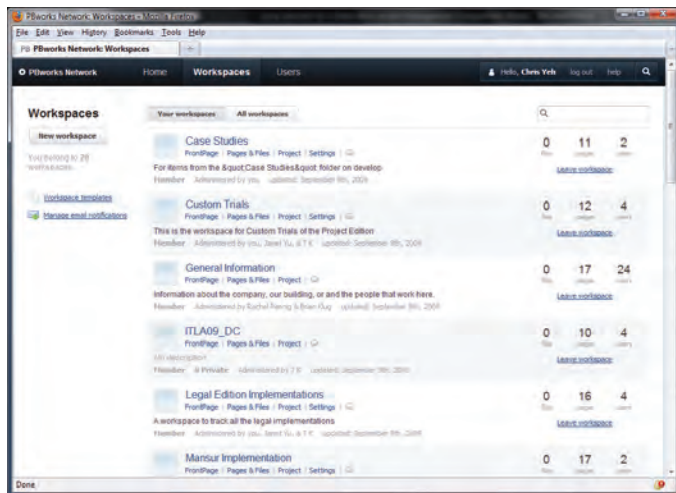
Let's tackle each in turn, and see how they work together.

### FIRM-WIDE NETWORKS

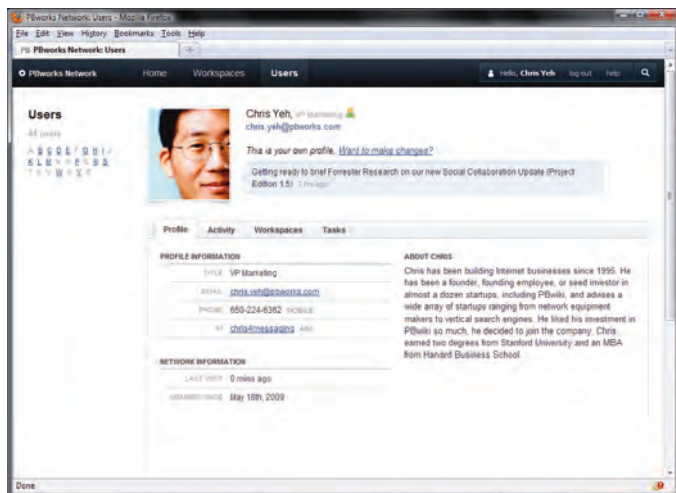
The natural unit of organization for most project-oriented companies is the project, not the firm. For companies whose main business is delivering on client projects, using a single workspace for collaboration simply doesn't make sense. While folders and tags can help organize a single workspace to serve multiple projects, it makes far more sense to set up a separate workspace for each project.

However, simply setting up completely discrete workspaces would cause its own set of issues. One would have to repeatedly add the same users to many workspaces. And if search took place at the workspace level, searching for a particular document or file could require visiting tens or even hundreds of individual workspaces.

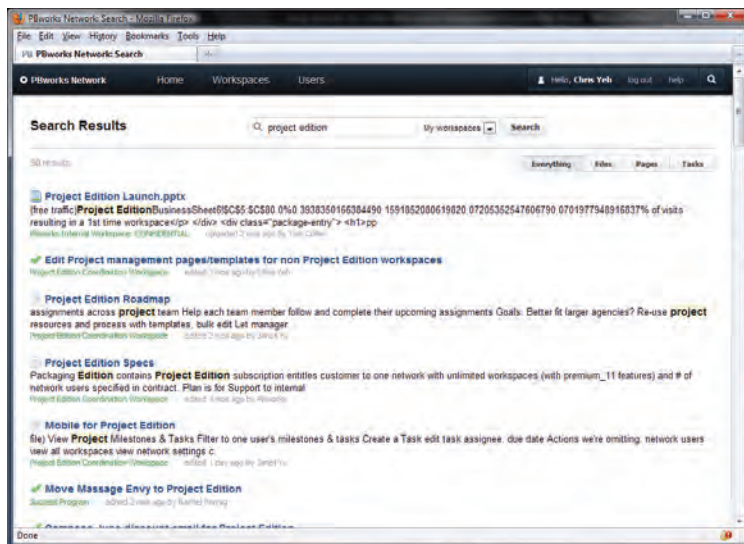
That's why PBworks Business Edition provides a firm-wide network as a container for an unlimited number of project workspaces.



The firm-wide network allows administrators to manage users and workspaces from a single, central control panel. Administrators can even specify the fields to include in a social networking-style user profile:

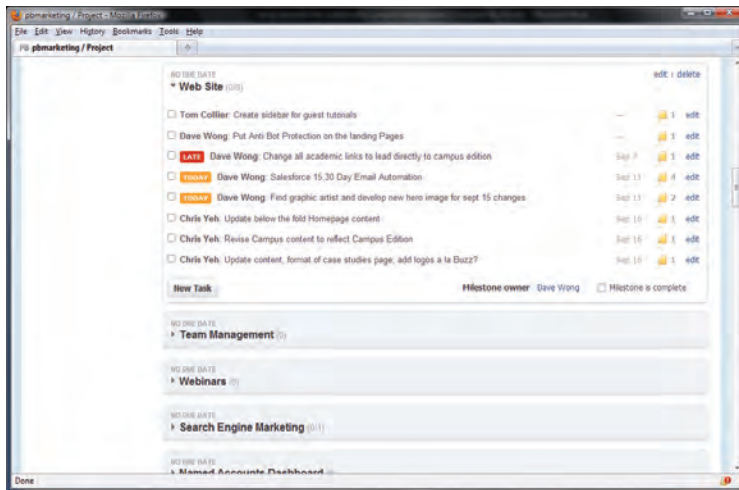


Network users can manage their own membership in the various workspaces, and Network search allows users to search all the workspaces in the network with a single query.



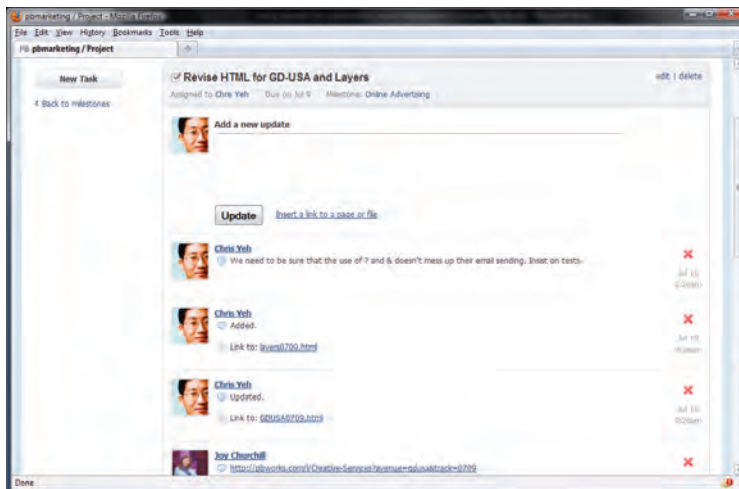
## TASKS AND MILESTONES

The core of project management is the task. One must be able to answer the question, “Who does What by When?” In Business Edition, the Project tab allows you to set up tasks for each project, group them into milestones, update those tasks as you make progress, and check them off once completed. Each task includes a description, and allows you to (optionally) assign the task to a particular user, and assign a set due date.

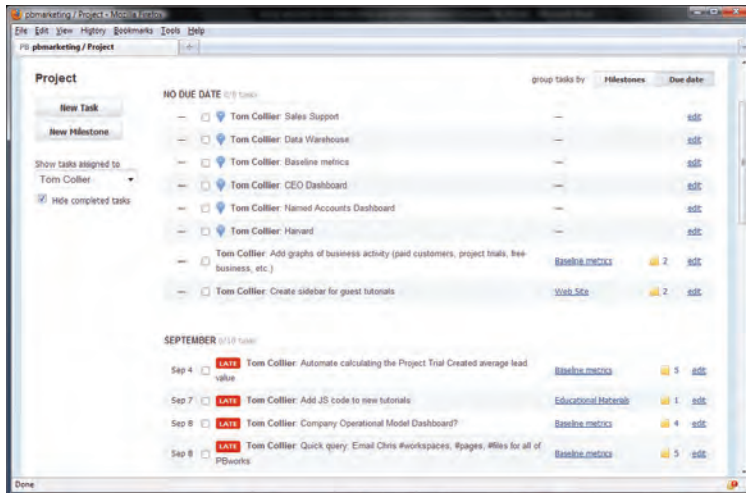


Unlike traditional project management tools, however, tasks in PBworks are collaborative and integrated with both wiki pages and uploaded files. Anyone can add an update to a task, and these updates can include links to wiki pages, uploaded files, or arbitrary URLs. This ability to add links allows users to provide the context needed to complete a task.

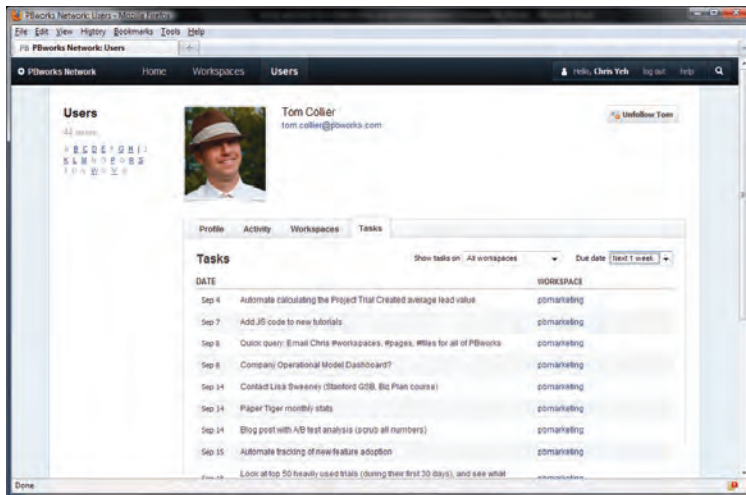
Rather than forcing a user to root through old emails or search for the relevant documents, the task itself can contain all the necessary pointers and information.



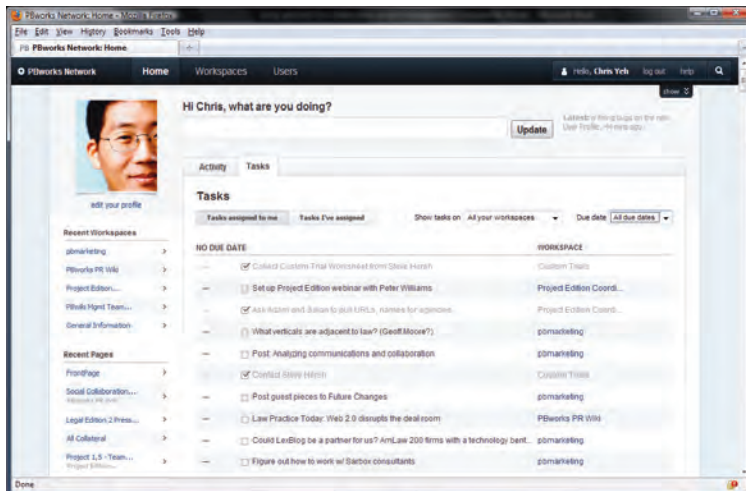
The date view allows you to view a project calendar, giving you a quick sense of which tasks and milestones are upcoming, due, or overdue.



Tasks and milestones are also integrated in other parts of the PBworks platform, including on the profile pages of your individual team members:



And as part of each team member's personal dashboard:

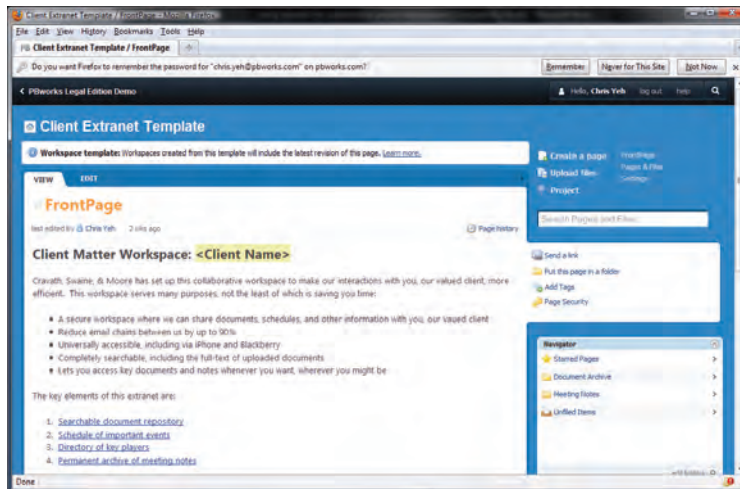


## WORKSPACE TEMPLATES

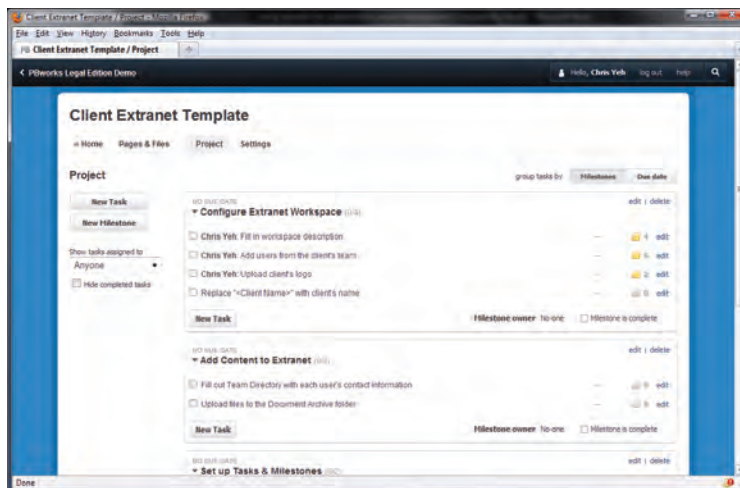
Many project-oriented firms have standard processes and procedures for executing their projects. Perhaps you always follow the same 5-step methodology, or use the same questionnaires and customer documents with each project. Business Edition's workspace templates make it easy to build these standard processes and procedures right into your project workspaces.

Each firm can create its own custom set of workspace templates, which can be used to create an unlimited number of collaborative workspaces.

Creating templates is as easy as editing a wiki; there are no special configuration screens or scripting languages. You can even use an existing workspace as a model.



Once the workspace template is complete, creating a new project workspace based on a template takes less than 15 seconds. Business Edition produces an exact clone of your template workspace, including all content, files, and tasks. Simply fill in the task assignments and due dates and you're ready to go.



## Success Stories

Agencies, consultancies, and other project-oriented businesses use PBworks' collaborative project management to increase client satisfaction by making them part of the team, work more efficiently by sharing plans and gathering feedback, and better coordinate efforts across the entire team--employees, clients, and contractors.

Our customers range from major companies such as the Financial Times to smaller firms like the award-winning video-game studio Wideload Games, and the prestigious Los Angeles design firm, The Groop. Each uses PBworks in a different way, reflecting the power of a flexible project management solution that lets you work the way that makes sense for your particular organization.

### The Financial Times

The Financial Times uses PBworks as a central hub for project management. At the beginning of each project, team

members use the wiki to share information, manage documents, and record conversations. As a project develops, the wiki continues to grow, adding notes, organizing files, and linking in other tools like the company's static intranet and online spreadsheets.

Projects can also become interlinked, allowing new projects to leverage the hard-won knowledge of previous projects to do things faster, better, and more efficiently. When a project requires the work of third-party vendors, the wiki really shines, giving vendors direct access to a well-documented project without requiring IT permission or changing firewall configurations.

### **Wideload Games**

PBworks was originally brought in to eliminate the confusion of distributing documents and production work via email. PBworks gives Wideload the ability to have a centralized repository of all the materials being developed for a video game that can be accessed from anywhere in the world. With PBworks, game developers have no need to blast their contributions via email to each of the many participants in each project. Instead, communal contributions can be uploaded to PBworks for all to see and access. Jon says that PBworks' role-based access system provides the necessary flexibility to allow all users to participate in development and discussions without stepping on each others toes.

PBworks has become the de facto standard inside Wideload for managing video game development. There are presently eight PBworks installations being used on projects ranging in size from eight to about 100 people. PBworks is used to allow the development team to share ideas, documents that embody those ideas and multiple iterations of an idea as it evolves through the conceptualization process.

When projects for new video games form, the project manager loads the initial wiki with a skeletal framework that supports the project. At Wideload this consists of a table of contents together with six or seven main pages related to the project. In particular, the development of characters is crucial to the video game creation process. Each character gets a "character page" which contains a character concept sheet that is used to store multiple iterations of character concept art. The wiki not only allows each participant to see and understand what the current character concept art is but also to understand how it evolved.

### **The Groop**

The Groop makes extensive use of folders and templates in their project collaborations. For example, The Groop created a "LA Phil" folder to manage a building project, a tribute to outgoing Los Angeles Philharmonic conductor Esa Pekka Salonen. The Groop's project folder includes a custom project board, complete with virtual tacks and index cards (implemented via a PBworks custom template), and offers read-only access to vendors and contractors so that they can participate in the daily scrum without compromising any of the other information on the wiki.

## **Conclusion**

As you can see, PBworks provides an easy and flexible way to manage your projects. This collaborative project management allows you to involve all the members of your team—including clients, partners, and vendors—in the management process. By integrating project management into the same collaboration platform your team uses to do their work, project management becomes an integral part of the work itself. The results are less time spent on project management, faster better results, and perhaps most importantly, happier clients.

## **About PBworks**

PBworks (<http://pbworks.com>) is the world's leading provider of hosted collaboration solutions for businesses and education. Leading companies and organizations like FedEx, Landor Associates, and the FDA choose PBworks to help teams work more effectively across geographic and organizational boundaries, including teams that span employees, customers, partners, and vendors.

Over 85,000 businesses have chosen PBworks to share knowledge, interact with customers, manage, projects, and support other forms of teamwork. We host over a million team workspaces, serve several million users each month, and 96% of users would recommend PBworks to a friend. Investors in PBworks include Mohr Davidow Ventures, Seraph Group, Sippl Investments, and Ron Conway.

## **Contact PBworks**

**Email:** [sales@pbworks.com](mailto:sales@pbworks.com)

**Phone (USA):** (866) 945-4463

**Phone (Int'l):** (415) 963-4369