CodeArts Req

Getting Started

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Contents

1 Getting Started with a Scrum Project

1.1 Scenarios

This topic is intended to help you grasp a quick overview of the Scrum project so that you can use the project after some basic settings.

A Scrum project supports agile sprint-based development. The sprint plan and timeline clearly display the project progress. You can customize the workflow to meet specific process requirements of your enterprise.

The following topics describe how to use Scrum projects in three different scenarios.

- **Project Managers: Creating and Configuring Projects**
- **Developers: Accessing Projects to Handle Work**
- **Project Managers: Tracking Project Progress and Risks**

📖 NOTE

The roles involved in this document are described as follows:

- Project manager: administrator of development
  - Creates and configures projects. For details, see **Project Managers: Creating and Configuring Projects**.
  - During the whole project process, pays special attention to the project progress and control risks. For details, see **Project Managers: Tracking Project Progress and Risks**.
- Developer: personnel responsible for development Works on project development and handles work item affairs. For details, see **Developers: Accessing Projects to Handle Work**.

## 1.2 Project Managers: Creating and Configuring Projects

Prerequisites

- The project manager has registered a tenant account. For details, see **Registering a HUAWEI ID and Enabling Huawei Cloud services**.

● The project manager has created IAM users for project members.

Procedure

To run a project in CodeArts Req for the first time, a project manager needs to create a project, invite project members, configure the project (including fields, statuses, workflows, modules, notifications, and permissions), develop a sprint plan, and set statistics reports. The procedure is as follows:

Create a project. → Invite members. → Configure the project. → Develop a sprint plan. → Set statistics reports.
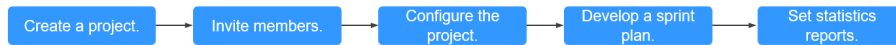
1. **Creating a Project**
2. **Inviting Members**
3. **Configuring the Project**
4. **Developing a Sprint Plan**
5. **Setting Statistics Reports**

Creating a Project

1. The CodeArts homepage is displayed.
2. Click **Create Project** and the dialog box is displayed.
3. Set **Project Template** to **Scrum**.
4. Fill out the project information.
5. Click **OK** to create the Scrum project.

   By default, the **Work > Req > Work Items** page of the project is displayed.

   ☐ NOTE

   For details about project requirement breakdown, such as **story writing** and **task estimation**, see **Mind Maps**.

Inviting Members

After a project is created, a project manager needs to add members to the project. A project manager can directly add members, or share the project link to invite members.

☐ NOTE

● When the project manager directly adds a member to a project, the member does not need to accept the invitation.
● When a project manager invites a member by sharing a project link, the member needs to accept the invitation.

● **Directly adding members**

   a. On the project details page, choose **Settings > General > Service Permissions > Member > Member View**.
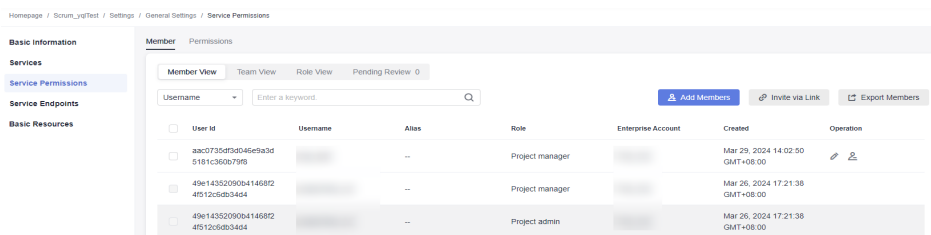
b. Click **Add Members**.

c. Many methods are provided for adding members. In this example, the option, **Import Users from Enterprise** is selected.
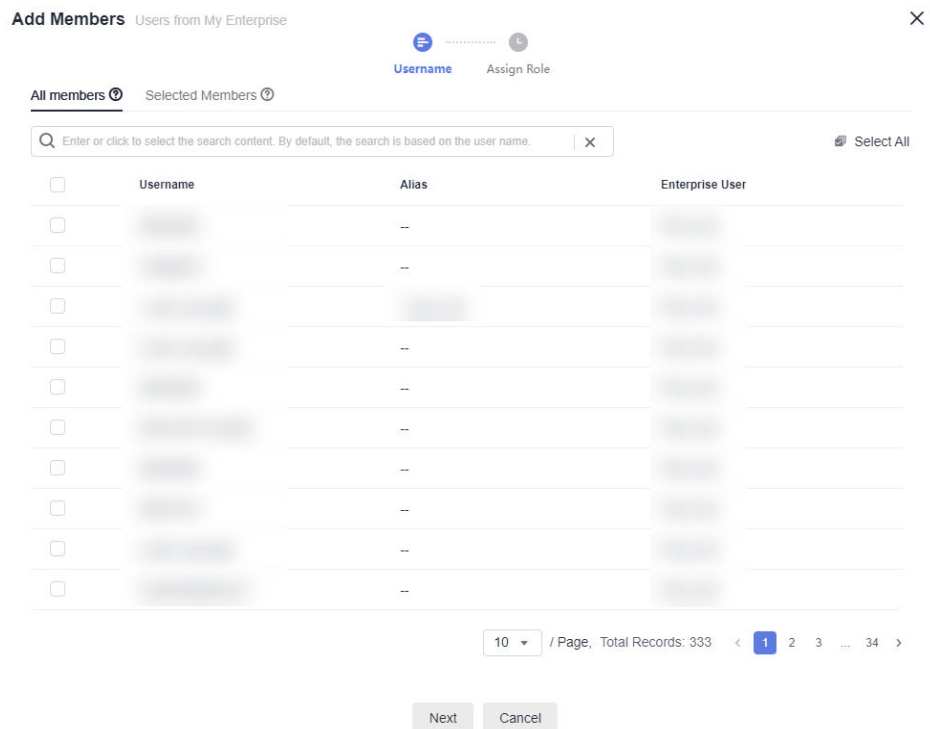
d. Select the users to be added in the dialog box that is displayed.

e. Click **Next**, specify project roles, and click **Save**.

📖 NOTE

- **Users from My Enterprise** refer to IAM users created by the tenant administrator on the IAM console, that is, users of the current enterprise.

- To add a new user (IAM user) to this list, click **Create User** and create one on the **IAM** console. For details about other operations, see **Member**.

- After the project manager directly adds members, the selected members will be added to the project member list.

- **Inviting members**

a. Click **Invite via Links** on the **Member View** page.

Invite Member

Scan the QR code or share the project URL to invite members.
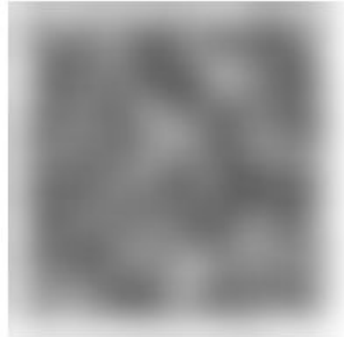
Project Name: Scrumtest01

https://devcloud.cn-north-4.huaweicloud.com/DevUCUser...   Copy URL

    b.   Click **Copy URL** to share the link to required project members.

☐ NOTE

- For security, members invited by sharing the project link need to wait for the administrator's approval by default.
- The administrator can choose **Member** > **Pending Review** and disable **Review Needed on Invited Members** to remove the approval setting as required.

Configuring the Project

Configure advanced settings of the project, including work item template, custom workflow, and permissions.

On the project details page, choose **Settings > Work**. The **Fields and Templates** page is displayed by default.

- Customize work item templates of different types.

    a.   Click **Edit Template** to modify the work item template, including **Description** and **Fields**.
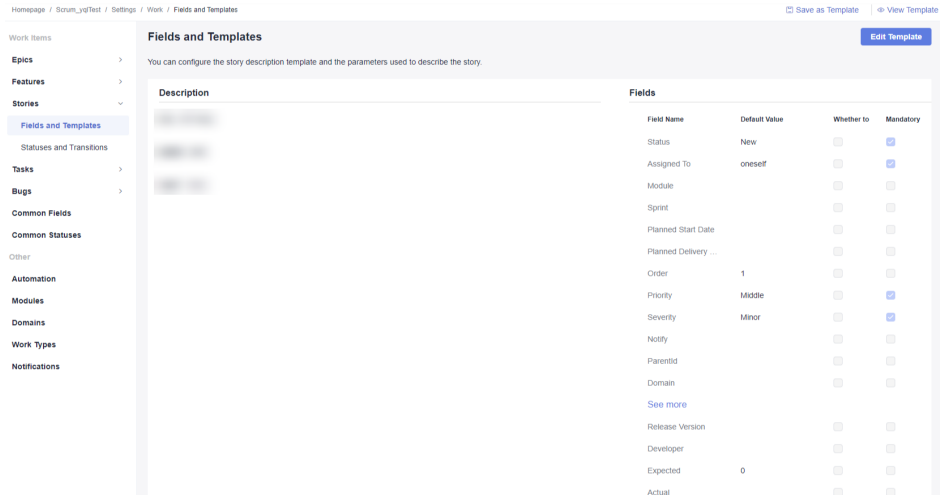
b. After the modification, click **Save** to save the template or click **Save as Template** in the upper right corner to save the template as a work template.

- Customize workflows.

  a. Click **Statuses and Transitions** for the work item on the left, for example, that for stories.
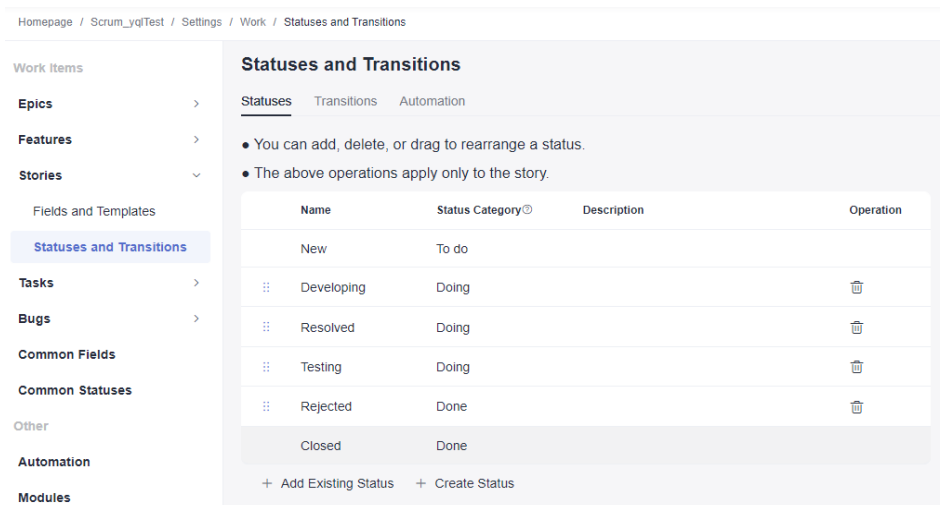
  b. Set the **Statuses**, **Transitions**, and **Automaton**, and save the settings.

- Setting permissions

  Set role permissions for each project member, including the project administrator, project manager, product manager, system engineer, committer, test manager, test engineer, O&M manager, participant, and viewer. You can also customize new roles and assign permissions to them as required.

  a. On the target project details page, choose **Settings** > **General > Service Permissions > Permissions**.
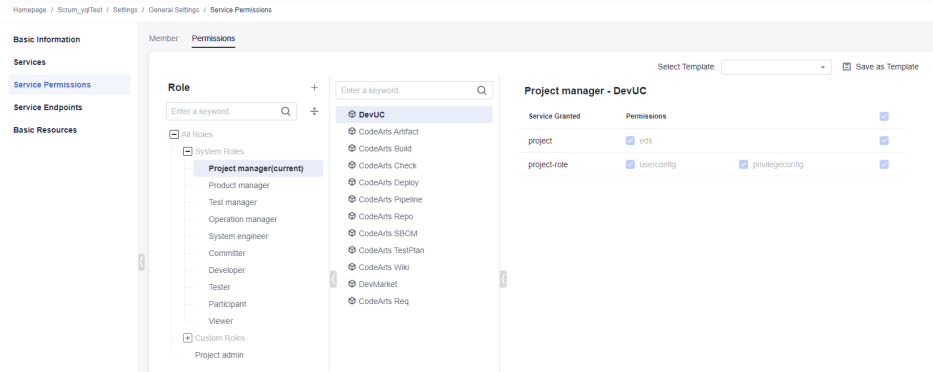
    b.   Click **Role** and set permissions for each work item and add roles.

- Modify basic project information.

    a.   Choose **Settings > General > Basic Information**.
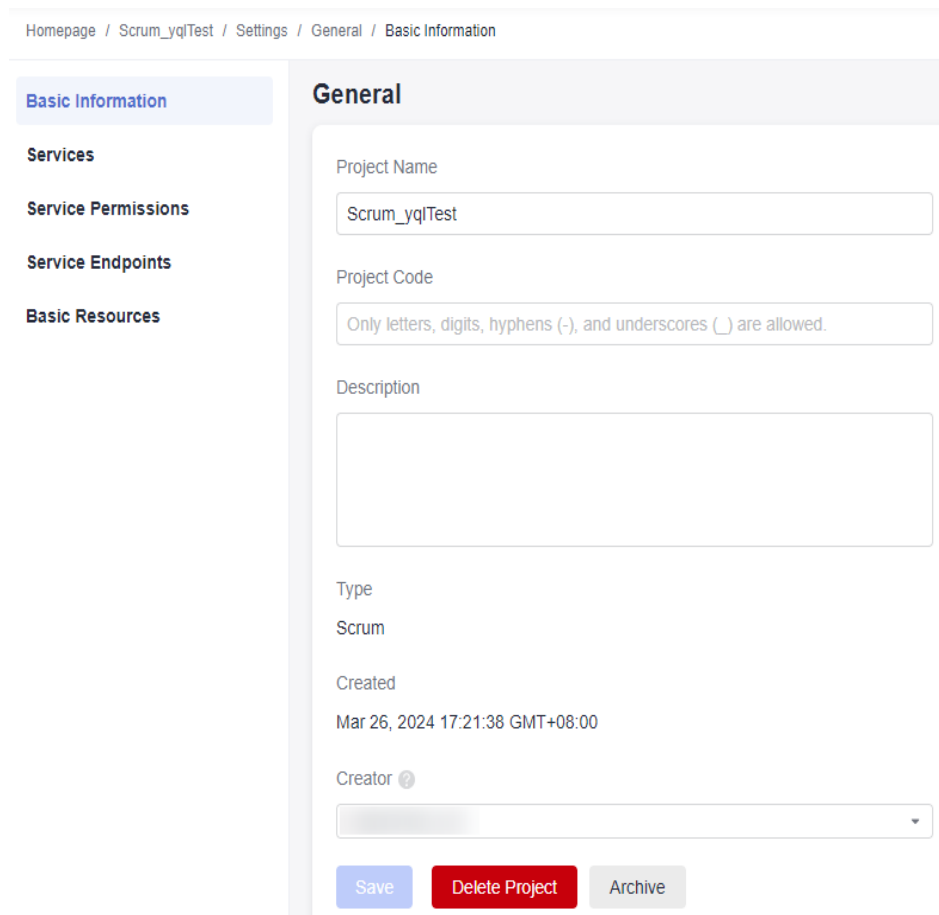
    b.   Modify basic project information (such as the project name and description) as required and save the changes.

Developing a Sprint Plan

Sprints can be used to track and manage version releases. You can create work items in a sprint on the **Sprints** page. During requirements planning, you can centrally manage all work items (such as epics, features, stories, and tasks).

1.   On the project details page, choose **Work > Req > Plans**.

Click **Mind Maps**. The mind maps page is displayed. Create a work item by referring to **Requirement Planning and Breakdown**.
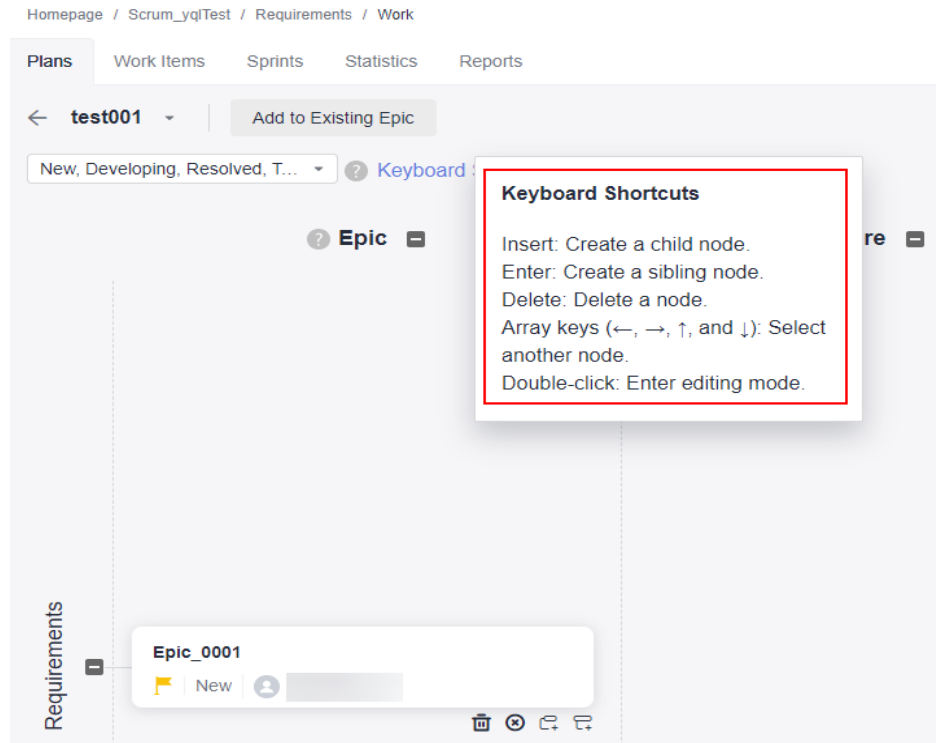
2. Choose **Work > Req > Work Items**, click the work item name to edit the work item.

During requirement planning, only the work item name is added. After requirement planning is complete, you need to modify the story details, including the description and basic information.
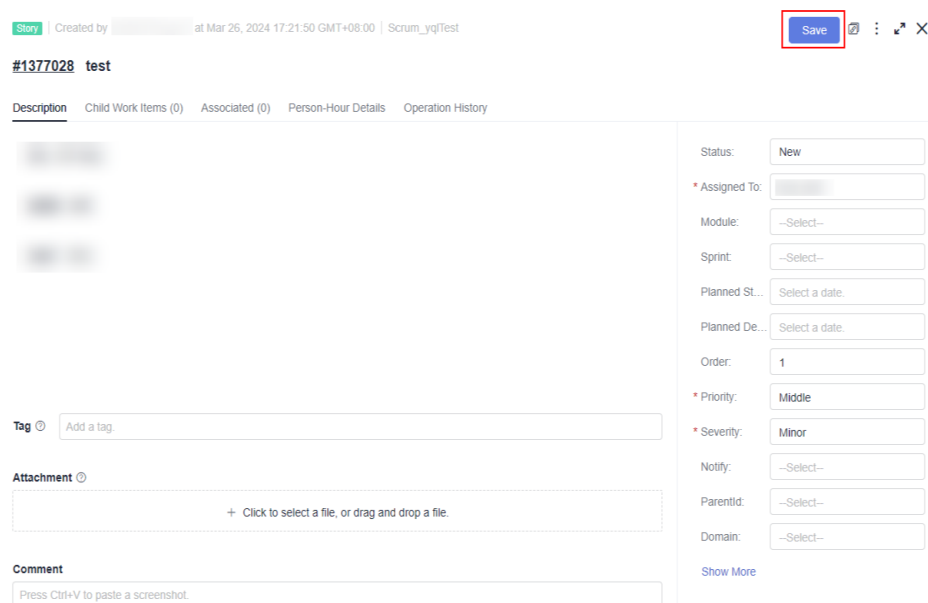
After the modification, click **Save**.

3. Choose **Work > Req > Sprints**.

You can click on the left to create a sprint. For details, see **Managing Sprints**.

4. After a sprint is created, plan the sprint based on the project version plan.

    a. Click **Unplanned Work Items** in the upper left corner to view all edited work items.

    b. Schedule an appropriate amount of work for a sprint by dragging work items to the sprint or selecting a sprint in the **Sprint** column of work items.

Setting Statistics Reports

In addition to various built-in reports such as labor hour statistics, work item distribution statistics, sprint burndown charts, and defect statistics in different dimensions, you can also customize statistics reports for your teams.

1. On the project details page, choose **Work > Req > Statistic**.

2. Click **Create Report** and select the report type in the left pane. The default type is **Custom**. The following uses the custom report as an example.

3. After you select **Custom Report**, specify the report title, list settings, and data filtering based on your requirements.

4. Click **Save** to create the report.

5. The created report is displayed on the statistics page. You can click the report title to view the statistics report. For details, see **Using a Report**.

1.3 Developers: Accessing Projects to Handle Work

Prerequisites

- You have received an invitation to join a project. (If you have already been added as a project member by the project manager, ignore the invitation.)
- The project manager has created IAM user accounts for developers.

Procedure

This topic describes how developers begin to work on a project in CodeArts Req. The procedure is as follows:
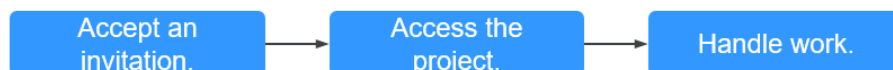
Accepting an Invitation

When using a project for the first time, you need to accept the invitation from the project manager.

1. Click the project URL or scan the QR code shared by the project manager.

2. Select the IAM user as prompted and enter the IAM user account created by the project manager to log in to the system. (If you have logged in to the system, skip this step.)

3. Accept the invitation. Then, the project manager will receive a review notification and review the request.

Accessing a Project

1. After the request is approved, developers access the CodeArts homepage and click **All Projects**.

2. Search for the target project in the search box in the upper right corner and click the **project name**. The **Work > Req >Work Items** page is displayed.

   By default, the **All** work item list is displayed.

Handling Work

1. Choose **Work > Req > Work Items** and click **Backlog**. The work items that need to be handled are displayed.

2. Select **My work items** from the **Apply** drop-down list.

3. You are advised to determine the task priority based on **Priority**, **Severity**, and **Sprint** values.

   If these fields are not displayed in the list by default, click **Field**. In the **Select Field** window, select **Priority**, **Severity**, and **Sprint**, and click **OK**. Configure other fields to be displayed based on your requirements.

4. Click the name of the target **work item** to switch to the work item details page.

5. Modify work items, such as the status, handler, due date, working hour, and done ratio.

6. Click **Save** in the upper right corner.

1.4 Project Managers: Tracking Project Progress and Risks

Procedure

Project managers are responsible of gathering statistics and measuring project performance. When a sprint is complete, they can review and summarize the sprint with insights provided by reports.

The procedure is as follows:

Using Reports

Statistics reports offer insights into sprint quality, progress, and workloads to enable data-driven improvement.

System and custom reports are provided.

- System reports are the default templates preset in the system and display the overview, person-hours, work item distribution, and sprints. You can select report templates based on your requirements.
- Custom reports show information about bugs and handlers.

Perform the following steps to use reports:

Step 1 Access the project details page and choose **Work > Req > Statistics** to switch to the statistics report page.

Step 2 Gain in-depth understanding of report statistics.

1. Click **Create Report**.
2. Select **Custom Report**.
3. Configure the report title, list settings, and data filtering, and customize the analysis dimension, comparison dimension, and measure.
4. Click **Save**.

   The created report is displayed on the statistical report page. You can click the report name to view the statistics. For details, see **Reports**.

----End

Uploading Sprint Summaries

The file library function allows project members to upload project, summary, and experience documents of every sprint to the cloud.

1. Access the project details page and click **Files**.
2. Click **Upload** to upload the project process documents.
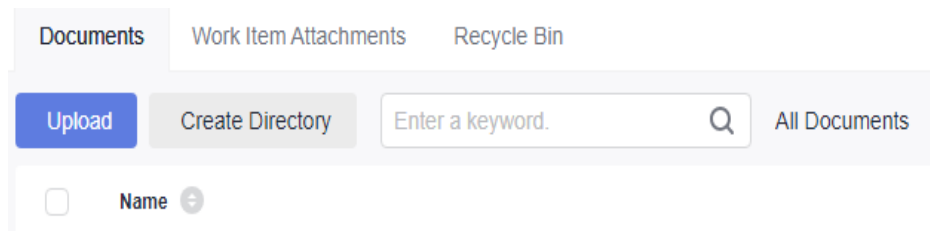
3. Uploaded documents are displayed in the **Documents** list. Project members can browse and download the documents online to accumulate project knowledge and summaries.

   ☐ NOTE

   - To retrieve a deleted document, you can select **Recycle Bin** to recover the document. You can also empty the recycle bin as required.
   - The recycle bin retains only documents deleted in a recent month.

2 Getting Started with an IPD Project

> **NOTE**
>
> IPD projects are available only in the AP-Singapore region.

2.1 Scenarios

Quickly build an overall impression on IPD projects. For example, a new company can quickly use an IPD project after the common operations are set.

Req is an IPD requirement management service oriented to different scenarios such as system device product development and independent software development. It uses structured processes and powerful cross-project collaboration capabilities to manage large-scale product development with high quality and efficiency. IPD requirement management is suitable for large-scale product development and provides multiple scenario-based models. The project manager selects a model based on product features.

The basic process of using IPD is divided into four scenarios by role:

- Administrator: Selects a proper IPD requirement management template to quickly create and set a project.
- Project manager: Records planning information and manages customer requirements.
- Developer: Accesses the project to complete tasks.
- Project manager: Tracks project progress and risks.

Two types of default project templates are provided, which contain different applications to meet requirements in different scenarios.

2.2 Administrators: Initializing Projects

2.2.1 Creating a Project

Step 1 On the CodeArts homepage, create a project.

Step 2 On the **Select Template** tab page, choose **IPD-System Device** and click **Select**. The **Create Project** page is displayed.

Step 3 Set the basic information.

Enter the **Name**, **Project Code**, and **Description** according to the following table, and click **OK**.

Parameter	Description
Name	Set this parameter as required.
Project Code	This parameter is set for third-party services. A project code is set to facilitate service management.
Description	Briefly describes the project.

Step 4 After the project is created, the project homepage is displayed. The message **Project created** is displayed.

----End

2.2.2 Inviting a Member to Be a Project Manager

Step 1 In the navigation pane on the left, choose **Settings > General**, click **Service Permissions**, and click the **Member** tab.

Step 2 Click **Add Members** and select **Import Users From Enterprise**.

Step 3 In the **Add Members** dialog box, select target members and click **Next**.

Step 4 Click the edit button in the row where the project role is located and set the role to project manager.

Step 5 Click **Save**. A message is displayed, indicating that the member is added successfully. The target member is set as the project manager.

----End

2.2.3 Creating a Plan

Creating a Plan

Step 1 On the CodeArts Req homepage, go to the project details page and switch to the **Plans** tab.

Step 2 Click **+ Plan** and choose **Release Plan**. The **Create Release** dialog box is displayed.

Step 3 Set the basic information.

In the dialog box, set **Release Name**, **Owner**, **Start/End Time**, **Planned Capacity**, and **Description**, and click **OK**. The new release plan is displayed in the list view.

Table 2-1 Parameter

Parameter	Description
Release Name	This parameter can be customized and is mandatory.
Owner	Select the release plan owner, who will have all operation permissions by default. This parameter is required.
Start/End Time	This parameter is mandatory.
Planned Capacity	Enter the planned workload, which can be accurate to one decimal place.
Description	Brief description of the new release plan. This parameter is optional.

----End

Creating a Sprint

Step 1 In the list view, select the desired release plan and click the ➕ icon in the **Operation** column. The **Create Sprint** dialog box is displayed.

Step 2 Set the basic information.

In the dialog box, set **Sprint Name**, **Release**, **Owner**, **Start/End Time**, **Planned Capacity**, and **Description**. Click **OK**. The sprint plan is successfully created and displayed in the list view.

Table 2-2 Parameter

Parameter	Description
Sprint Name	This parameter can be customized and is mandatory.
Release	Release plan scope of a sprint. This parameter is required.
Owner	Select a sprint plan owner, who will have all operation permissions on the sprint by default. This parameter is required.
Start/End Time	This parameter is mandatory.
Planned Capacity	Enter the planned workload, which can be accurate to one decimal place.
Description	Brief description of the new sprint plan. This parameter is optional.

----End

2.3 Project Managers: Managing Features and Raw Requirements

2.3.1 Managing Feature Trees

The feature tree management consists of feature trees. When creating a feature, you can directly select the feature set to which the feature belongs and create a feature in the feature set.

SFs are the key to solving problems (PBs). In principle, features are a set of key selling points (highlights) of a product package. Each feature is an E2E solution that meets customers' specific business requirements. Some features can be sold separately via license control.

A feature tree aggregates and manages features and their relationships. And the feature tree version snapshot and snapshot comparison functions are provided.

Creating a Feature Tree

Step 1 Go to the feature tree page on the **Feature Tree** tab page.

Step 2 Click **Creating a Level-1 Feature Set**.

Step 3 Enter a **Title** and click **OK**.

Step 4 Check the new feature set on the **Feature Tree** page if **Created** is displayed.

----End

Managing a Feature Set

Step 1 Access the **Feature Tree** tab page.

Step 2 Click ✛ on the right of a feature set. The **Create SF** dialog box is displayed.

Step 3 Enter a title and click **OK** in the dialog box. A message indicating that creation is successful is displayed in the upper right corner of the page. The new feature set is created.

Step 4 The level-1 feature set is displayed in the project feature tree. You can click the icon next to the parent feature set to expand the sub-feature set.

----End

Creating an SF Under the Feature Tree

Step 1 Click **CreateSF** above the feature tree list. The **SF** page is displayed.

Step 2 Set the parameters. **Table 2-3** lists the parameters and their descriptions.

Step 3 Click **OK**.

Step 4 Check the created SFs under the corresponding feature set.

Table 2-3 Parameters

Parameter	Description
Title	Feature name.
Description	Description of a feature in the form of text, image, or link. The system provides different templates based on the work item types. For example, you can describe a feature description about its: **[Background]** **[Value]** **[Details]**
Attachment	A maximum of 100 attachments can be added to a feature, and the total capacity is 50 MB.
Responsible Project	A project to which the current feature belongs. This parameter cannot be changed.
Owner	Owner of a feature. Only one owner can be selected. The default owner is the creator.
Feature Set	The feature set to which the feature belongs is a home structure of the feature.
Priority	Priority of a feature, which can be low, medium (default), or high.
Planned Start	Planned start time of a feature.
Planned Completion	Planned completion time of a feature.
Planned Workload	Planned working hours of a feature.
High Value	Whether a feature is a key feature. The value can be **Yes** or **No**.
Used For	Scenario with a maximum of 512 characters.
Domain	Domain to which a feature belongs.
Copy To	Person to whom the feature is copied.

----End

2.3.2 Managing Raw Requirements

Creating an RR

Step 1   On a project details page, go to the **Raw Requirements** page.

Step 2   Click **+Create RR**.

Step 3   Configure the parameters.

Table 2-4 Parameters

Parameter	Description
Title	Name of a raw requirement.
Description	Description of a requirement in the form of text, image, or link.
	The system provides different templates based on the work item types. For example, the format of the raw requirement description is as follows:
	[Background]
	[Value]
	[Details]
Attachment	The maximum number of attachments for a raw requirement is 100, and the total size of them should be no more than 50 MB.

Parameter	Description
Proposed Project	By default, it is the project to which the raw requirements belong and cannot be changed.
Raised By	By default, the raw requirement creator is selected. You can select multiple people.
Expected Completion	Expected completion time.
Responsible Project	The current project is selected by default. You can select other projects as well.
Recipient	Owner of the raw requirement.
Priority	The severity can be low, medium, or high.
Copy To	Other members of the project team.

Step 4 Click **Submit**.

Step 5 Check the created raw requirements on the project details page if **Request Submitted Successfully** is displayed.

----End

Accepting an RR

Step 1 Click a raw requirement to view its details.

Step 2 Click **Accepted** in the upper right corner in the drawer.

Step 3 Select the **Owner**,**Planned Completion**, **Promised**, and **Priority** and set **Planned Workload** and **Conclusion**.

Accepted ✕

* Owner [　　　　　　] ▾

* Planned Com... [--Select--　　　　📅]

* Promised [--Select--　　　　▾]

* Planned Wor... [Required.　　] person-day

* Priority [● Medium　　　▾]

Conclusion

[toolbar: 🧽 ↩ ↪ Nor... ▾ **B** A ▾ ≣ ≡ ≣ </> 🔗 🖼 ⊞ ⛶]

Conclusion required.

[OK] [Cancel]

Step 4　Click **OK**. The raw requirement is now at the **Planning** stage.

----End

Breaking Down a Raw Requirement

Step 1　Click a raw requirement to view its details. Go to the **Related Items** tab page.

Step 2　Click **Break Down** next to **Subrequirement**. The **Break Down Subrequirements** dialog is displayed.

Step 3 Configure the parameters and click **OK**.

Step 4 Check whether the broken down initial requirements are displayed in the **Related Items** > **Subrequirement** area on the raw requirements details page. On the **Raw Requirements** page, broken down initial requirements are displayed as a child requirement under the raw requirement.

📖 NOTE

Only raw requirements in the **Planning** and **Implementing** statuses can be broken down.

----End

2.4 Developers: Processing Work Items

2.4.1 Accessing a Project

After adding developers to a project, the project manager sends the access link to the developers. Developers can click the link, enter the account and password, and go to the project.

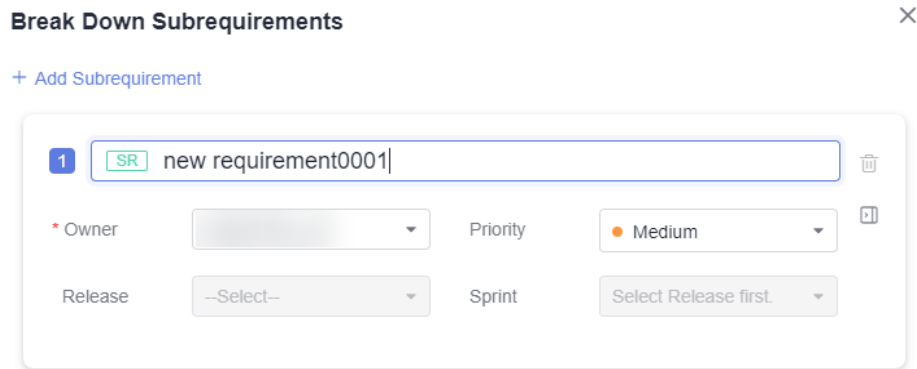For details about how a project manager adds developers, see **Inviting a Member to Be a Project Manager**.

2.4.2 Processing Work Items

Project members can break down, associate, and transfer work items on the **R&D requirements**, **tasks**, and **bugs** pages.

Breaking Down an IR, SR, and AR

Step 1   Click ⌞⁺ in the **Operation** column of an initial requirement.

Step 2   Modify the title in the **Break Down Subrequirements** dialog box and click **OK**. IR's title is used by default.
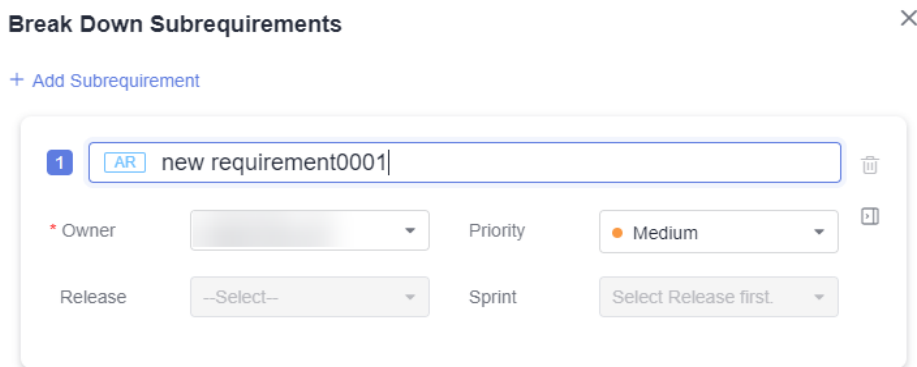
Break Down Subrequirements   ✕

+ Add Subrequirement

| 1 | SR | new requirement0001 | 🗑 |

* Owner [▼]   Priority [● Medium ▼]

Release [--Select-- ▼]   Sprint [Select Release first. ▼]

Step 3   Check the system requirement under the initial requirement.

Step 4   Click ⌞⁺ in the **Operation** column of a system requirement.

Break Down Subrequirements   ✕

+ Add Subrequirement

| 1 | AR | new requirement0001 | 🗑 |

* Owner [▼]   Priority [● Medium ▼]

Release [--Select-- ▼]   Sprint [Select Release first. ▼]

Step 5   Modify the title in the **Break Down Subrequirements** dialog box and click **OK**. SR's title is used by default.

Step 6   Check the allocated requirement under the system requirement.

----End

Associating a Task

Step 1   Click an allocated requirement to view its details.

Step 2   Choose **Related Items** > **Associate Work Item** > **Task**.

Step 3 Enter the title of a task and click **OK**. The **Task created** message is displayed.

----End

Creating a Bug

Step 1 Go to the **Bugs** tab page on the project details page.

Step 2 Click **+Bug**.

Step 3 Configure the bug parameters. The following table describes parameters.

Parameter	Description
Title	Name of a title
Description	Description of a requirement in the form of text, image, or link. The system provides different templates based on the work item types. For example, the format of the bug description is as follows: **[Fault Symptom]** **[Environment Information]** **[Onsite Fault Locating R&D Engineer]** **[Preliminary Fault Locating]**
Raised By	Testers who find a bug.
Owner	A developer who fixes the bug.
Severity	The severity can be info, minor, major, or critical.

Parameter	Description
Responsible Release	Plan. You can create a release on the plan management page.
Responsible Sprint	The next level of Release. After the release is released, create a sprint by breaking down the release.
Environment	Includes **Testing**, **Development**, and **Production**.
Copy To	You can copy the bug description to other members of the project. Only the selected members receive a system notification.
Expected Rectification	Expected rectification time.

Step 4　Click **Submit**. The **Bug created** message will be displayed.

Step 5　Check the bug in the **Analyzing** status.

　　----End

Associating a Bug to an AR

Step 1　Click the title of a bug to view its details.

Step 2　Choose **Related Items** > **Associate Work Item** > **Associate** > **Associate AR**.

Step 3　Select the target allocated requirement and click **Associate** in the **Associate Work Item** window.
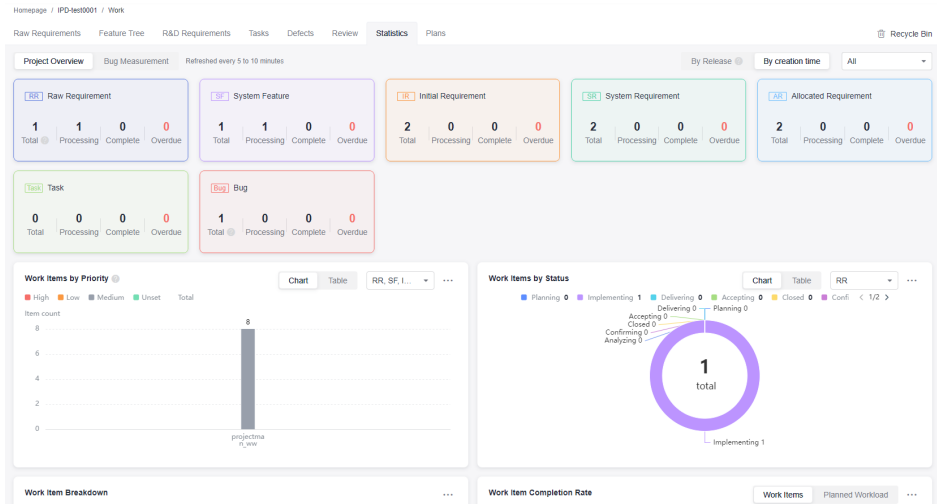
　　----End

2.5 Project Managers: Controlling Project Progress and Risks

2.5.1 Viewing the Project Progress Through Statistical Reports

Step 1　Go to the **Statistics** tab page on the project details page.

Step 2　View project progress in statistics reports from multiple dimensions. Filter statistics by creation time or by .

----End