ProjectMan

Getting Started

Issue 3

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HUAWEI TECHNOLOGIES CO., LTD.

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Notice

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.

- **1.2 Project Managers: Creating and Configuring Projects**
- **1.3 Developers: Accessing Projects to Handle Tasks**
- **1.4 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 **1.2 Project Managers: Creating and Configuring Projects**.
  - During the whole project process, pays special attention to the project progress and control risks. For details, see **1.4 Project Managers: Tracking Project Progress and Risks**.
- Developer: personnel responsible for development Works on project development and handles work item affairs. For details, see **1.3 Developers: Accessing Projects to Handle Tasks**.

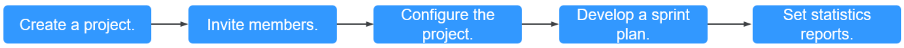
1.2 Project Managers: Creating and Configuring Projects

Prerequisites

- The project manager has registered a tenant account. For details, see **Account Registration Process**.
- The project manager has created IAM users for project members.

Procedure

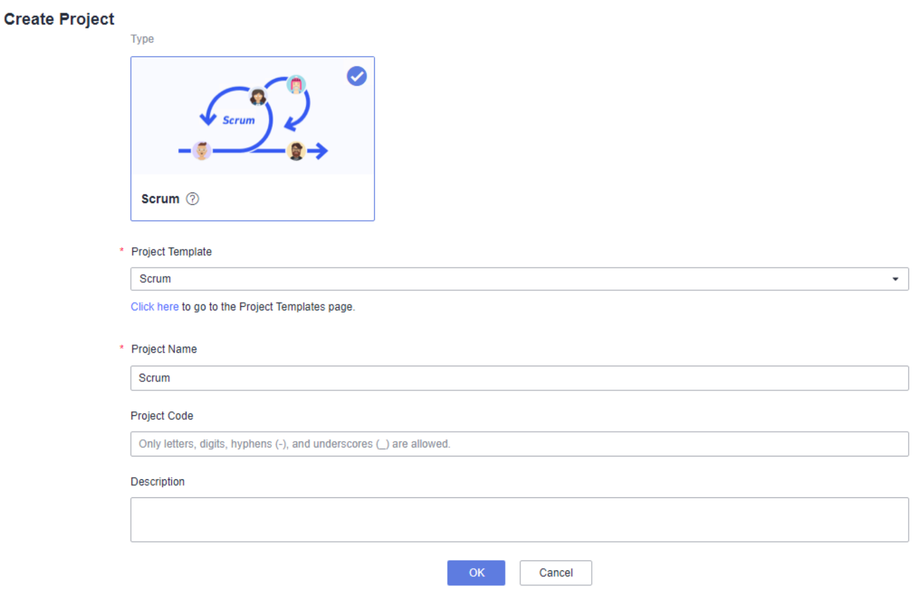
To run a project in CodeArts Req for the first time, a project manager needs to create a project, add project members, configure the project (including fields, statuses, workflows, modules, notifications, and permissions), develop a sprint plan, and set reports. The procedure is as follows.



1. **Creating a Project**
2. **Inviting Members**
3. **Configuring the Project**
4. **Developing a Sprint Plan**
5. **Setting Statistics Reports**

Creating a Project

1. Access ROMA Factory DevOpsCodeArts.
2. Click **Create Project** in the upper right corner of the ROMA Factory DevOpsCodeArts homepage. The **Create Project** 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** > **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 QR code or 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 QR code or project link, the member needs to accept the invitation.

- **Directly adding members**
  a. On the project details page, choose **Settings** > **General Settings** > **Members**.
  b. Click **Add Member**.
  c. Many methods are provided for adding members. In this example, **Users from My Enterprise** is selected.

     Select target members, click **Next**, and add the members as prompted.

     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, see **Managing Members**.
     - 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 **Members** page.

     The invitation QR code and invitation link are displayed.
  b. Share the QR code or click **Copy URL** to share the link to required project members.

  NOTE

  - For security, members invited by sharing the QR code or project link need to wait for the administrator's approval by default.
  - The administrator can choose **Members** > **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 permission settings.

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

- Customize work item templates of different types.
  a. Click **Edit Template** to modify a work item, 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 project template.
- Customize workflows.
  a. Click **Statuses and Transitions** for the work item on the left, for example, that for stories.
  b. Set the work item status, transition direction, and automatic transition, and save the settings.
- Setting permissions

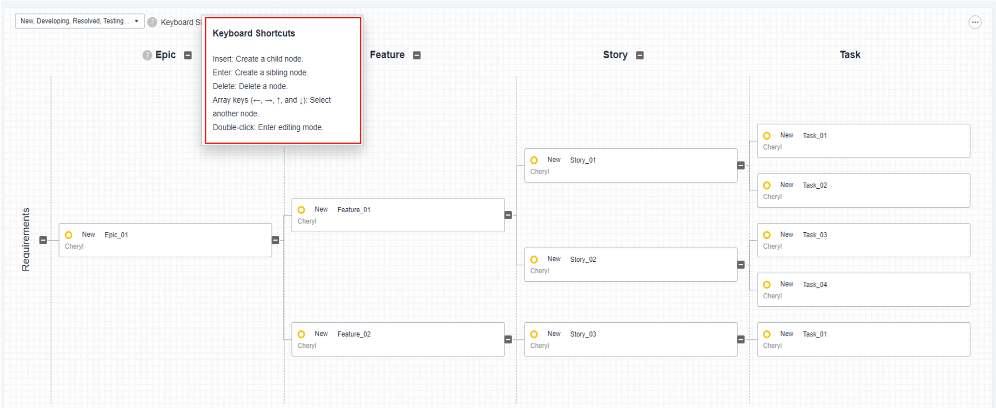
  Set role permissions for each project member, including the project manager, developer, test manager, tester, participant, and viewer. You can also customize new roles and assign permissions to them as required.
  a. Switch to the details page of the target project and choose **Settings** > **Project Settings** > **Permissions**.
  b. Click **Add Role** and set permissions for each work item to add a new role.
- Modify basic project information.
  a. Choose **Settings** > **General Settings** > **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** > **Plans**.

   Click the **Mind Maps** tab. **Plan and break down requirements**. Create a work item.



2. Choose **Work** > **Plans** on the navigation bar, click the work item name, and 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** > **Sprints**.

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

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** > **Statistic**.

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

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

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

   The created report is displayed under **All** in the navigation pane on the left of the statistics page. You can click the report name to view the statistics report. For details, see **Viewing Statistics**.

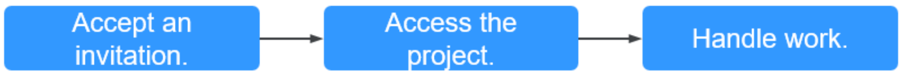
1.3 Developers: Accessing Projects to Handle Tasks

Prerequisites

- You have received an invitation to join a project. (If you have already been added to a project as a 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.

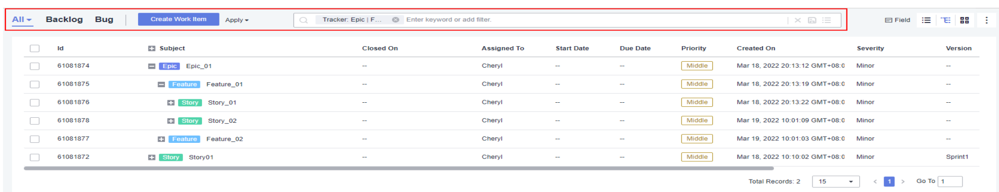
1. Click the project URL or scan the QR code shared by the project manager.

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 the Project

1. After the request is approved, access the ROMA Factory DevOpsCodeArts homepage and click **All Projects** on the left.
2. Search for the target project in the search box in the upper right corner and click the project name. The **Work** > **Work Items** page is displayed.

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



Handling Work

1. Choose **Work** > **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 **Version** values.

   If these fields are not displayed in the list by default, click **Field**. In the **Select Field** window, select **Priority**, **Severity**, and **Version**, 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 work item status, handler, estimated end date, person-hours, and progress.
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 and 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** > **Statistic** to switch to the statistics report page.

Step 2 Select reports under **All** to view report statistics in different dimensions.

Step 3 Gain in-depth understanding of report statistics.

1. Click **Create Report**.
2. Select **Custom Report**.
3. Configure the report name, data setting, and data filtering settings, and customize the analysis dimensions, comparison dimensions, and summary items to be collected.
4. Click **Save**.

   Created reports are displayed under **All** in the navigation pane on the left. You can click the report name to view the statistics. For details, see **Viewing Statistics**.

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Uploading Sprint Summaries

DocMan allows project members to upload project documents, such as sprint and experience summaries, to the cloud.

1. Access the project details page and select **Documentation**.
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 and directories deleted in a recent month.

