Lab Exercise - Targetprocess

IT3040 – IT Project Management   **Semester 1**

Targetprocess is a commercial Agile project management tool that allows following a Scrum, Kanban, or customized approach. It provides an intuitive and rich visual interface to manage your software development projects in a collaborative way.
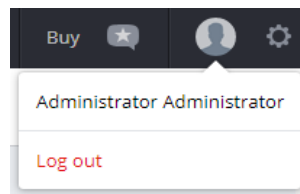
1. Login

When you log in for the first time, there is only one user account in the system, and it is your account. You are an Administrator by default. Follow these instructions to update the name and password on your account.

You've created your Targetprocess account and successfully logged in. Now you can take your first steps in the application and start to explore and configure it for your needs and the needs of your team.

When you first log in, there is only one user account in the system: yours. Here are the default details always used for this first account:

- First and Last Name: Administrator Administrator
- Login: admin
- Password: admin
- Avatar Photo: no photo

Naturally, you're welcome to change these settings. The quickest way to do this is to use the My Profile menu. Click on the avatar icon in the right corner of the top menu.
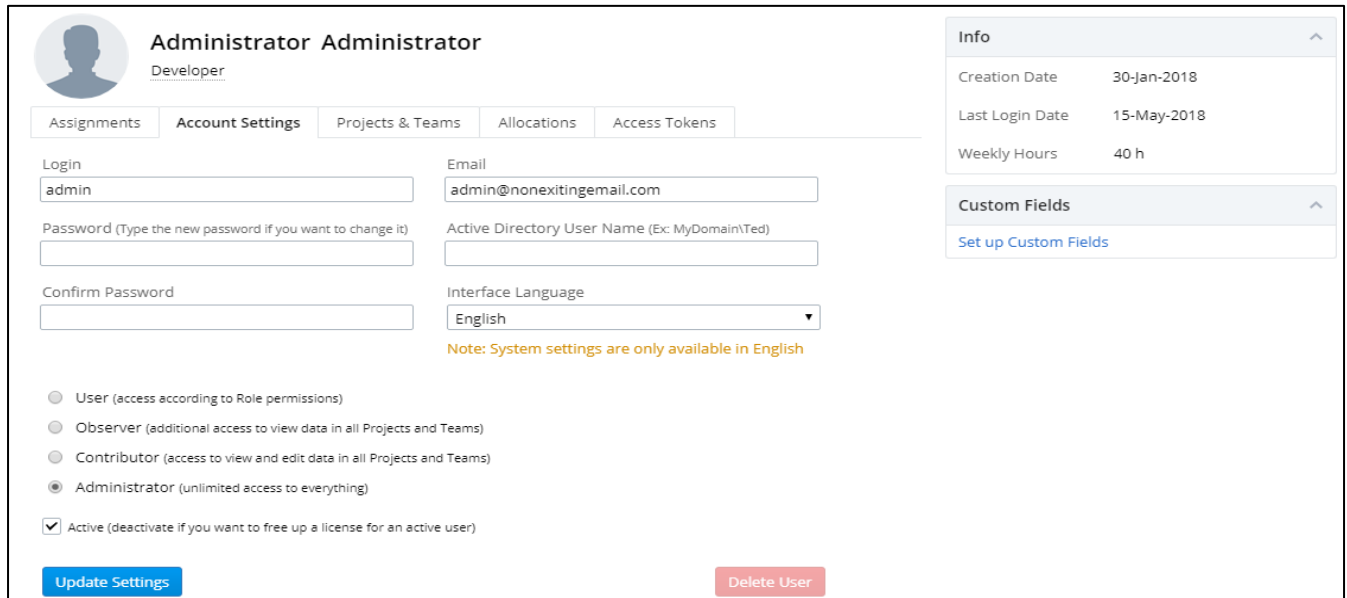

Once on the profile page, navigate to the Account Settings tab. Here you're able to update your login, email, password and other details of your personal profile.

2. Create a Project
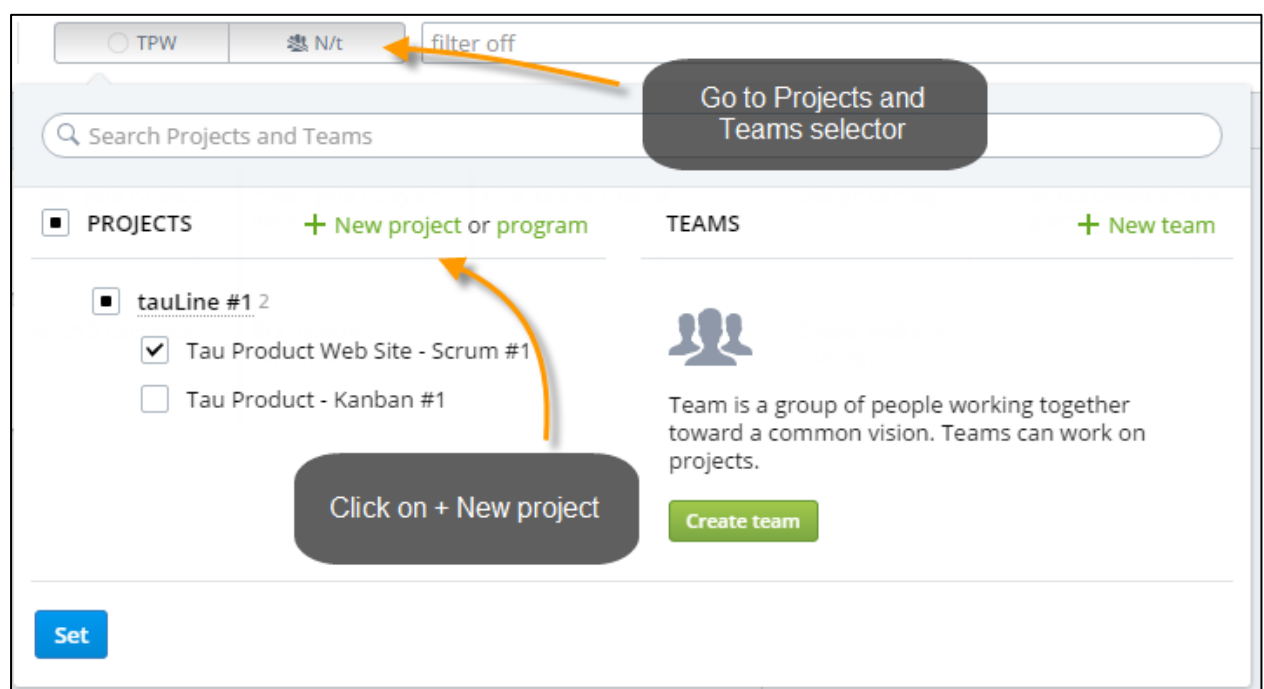
a. Go to left side navigation pane. Click on Dashboard. Then Click on -> **Any Project**.
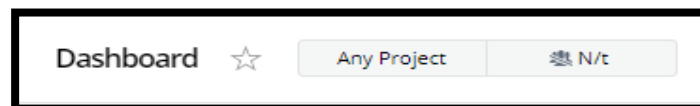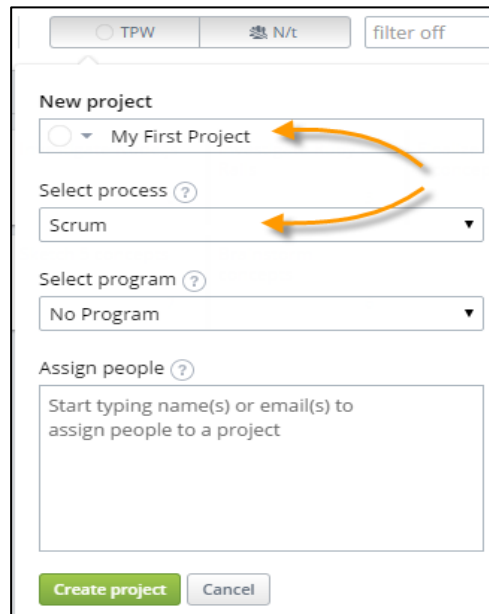

b. Click on New project
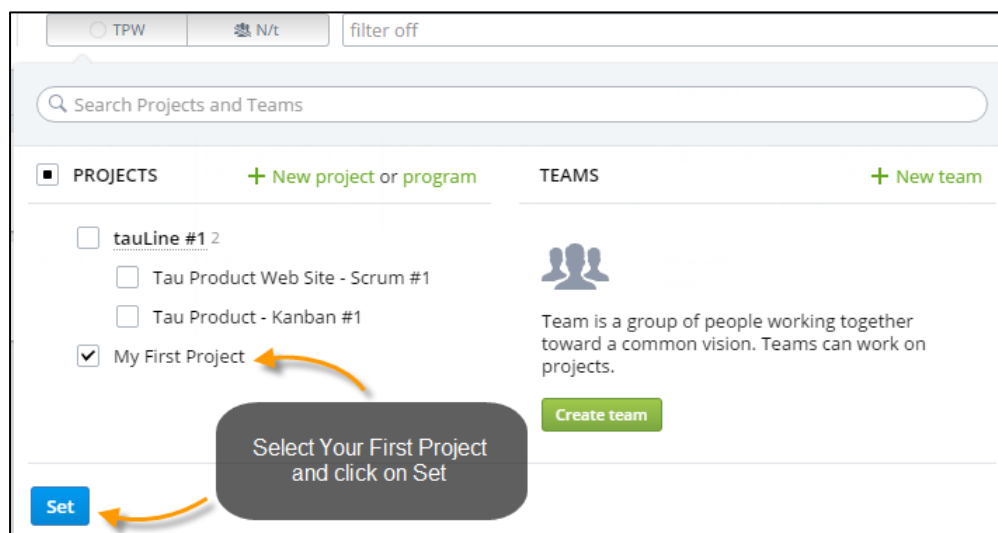
c. Give a name to the project. Choose a process. You can use one of our default processes or create your own. Skip Assign people, you will get back to it later. Click on the "**Create Project**" button.

d. Select your project in the project list. Click on the "Set" button. Now you can interact with only the just created project.
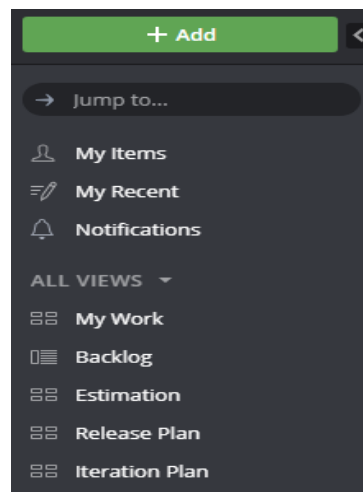
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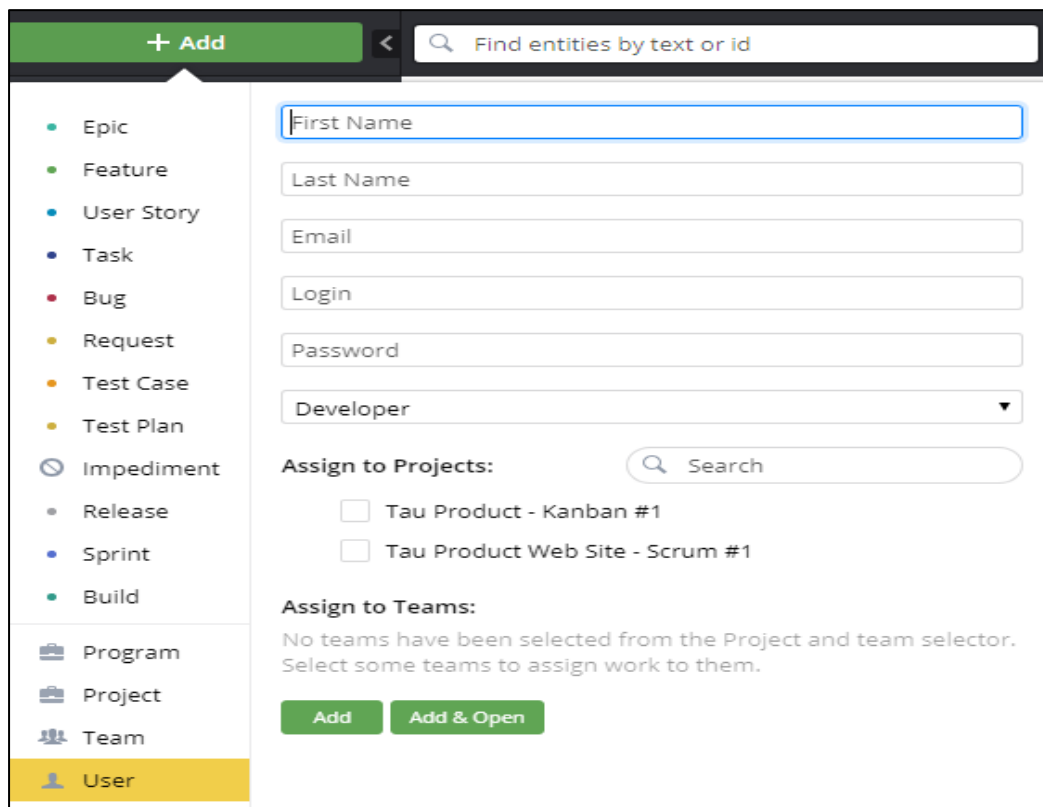**IT3040 – IT Project Management**   **Semester 1**

3. Add Users

Now you can add users and assign them to the project. As the project creator you are already a member of the project. Let's add others.

a. Click on the add button on the tope left corner

b. Now click the user in the left side pane and fill the form. Assign the user to for the relevant project.

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4. Create Your Backlog

The Backlog is a list of all work items that need to be done in a project. Let's store requirements using User Stories level in Targetprocess as they are the most common way to keep the work. Navigate to the domain model to learn more about the entity's hierarchy.

a. Go to the "**Backlog**" view in the Views list. Since you haven't created any work in "My First Project" yet there is nothing there.
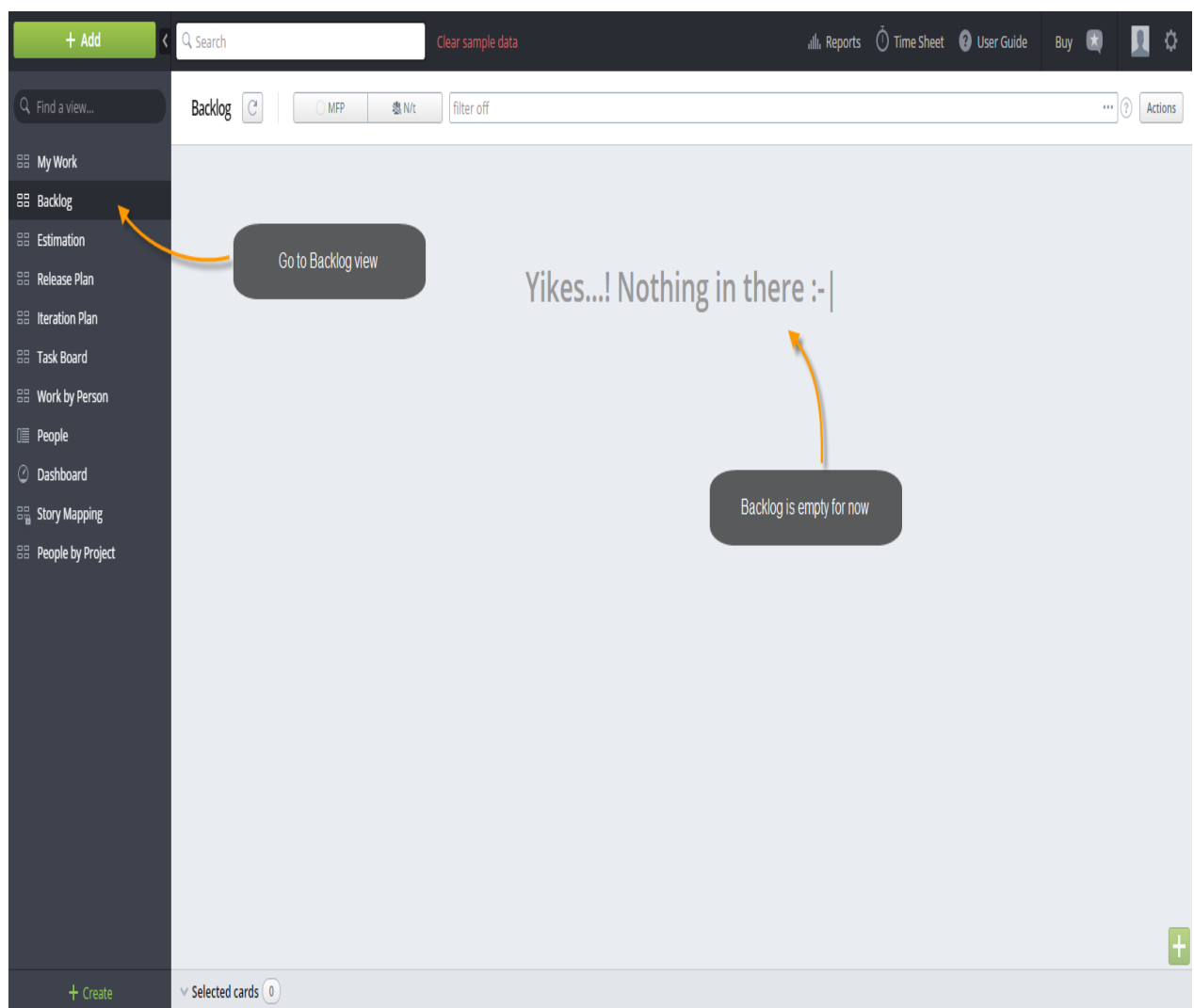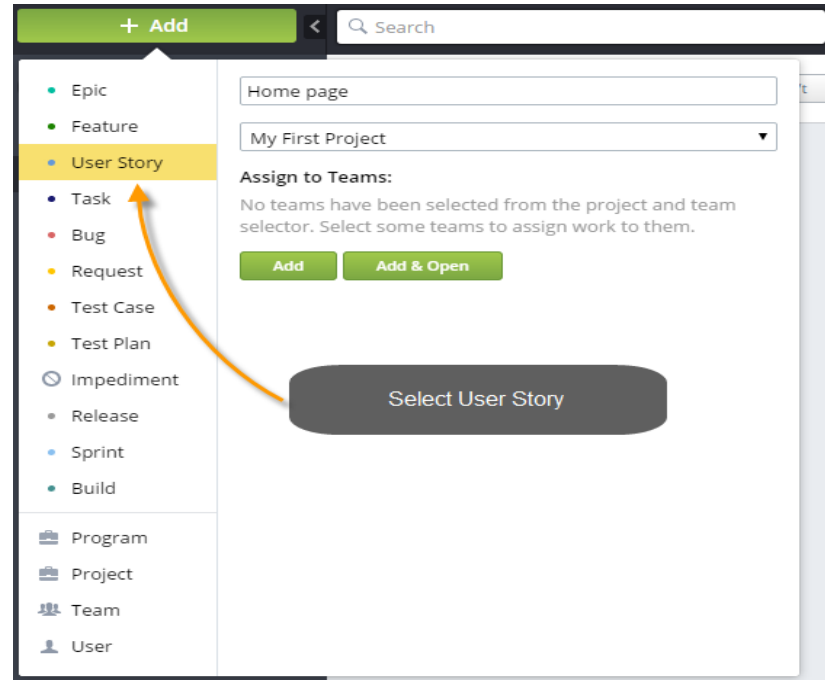

b. Fill **the backlog with work**. You already know how to quick add from a view from when you added Users. Click on the big green "+ Add" button in the upper left corner. In the future you can add other entities using the big green "**+Add**" button.

c. **Continue to add your User Stories**. Any added work appears on the view. To provide more details on a requirement you can switch between the user stories from the list on the left and add additional details to the requirement such as a description, tags, etc. on the right.
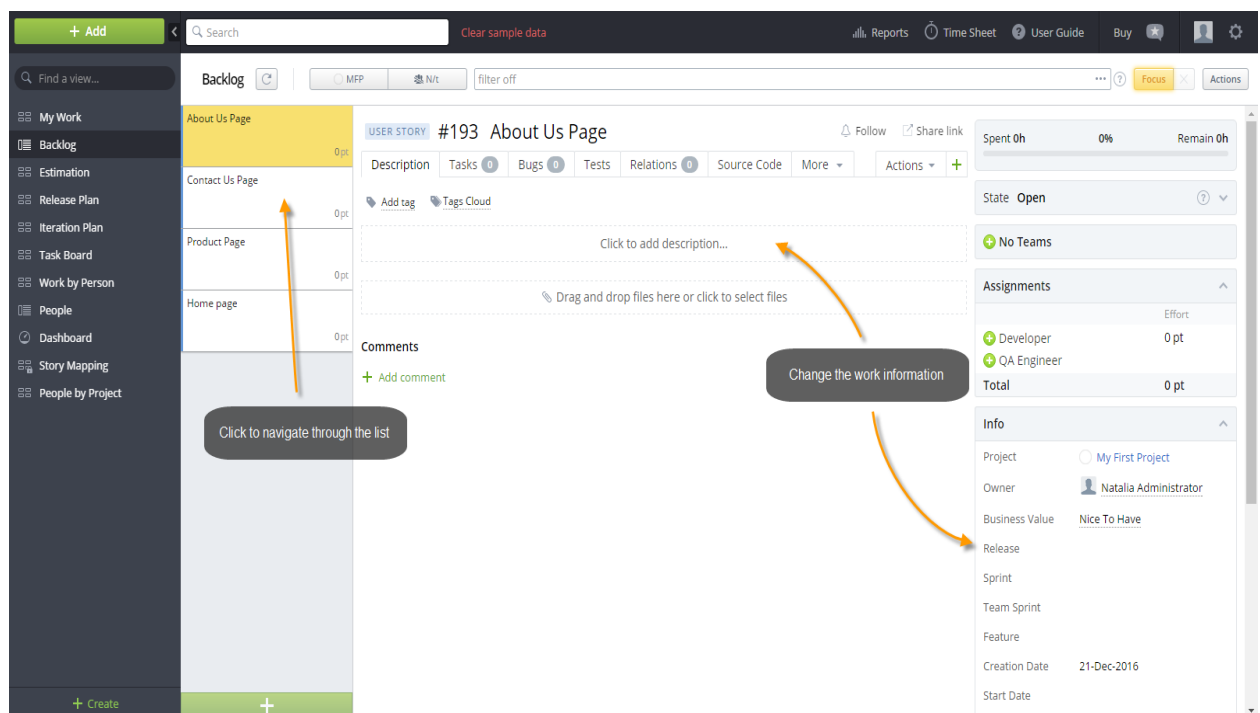
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5. Track Your Progress

As you see, a View is the representation of the data from the selected projects. You worked with users on the "People by Project" view and with user stories on the "Backlog" view. You can visualize data either as cards on a view, as items in the list, or as plan items on the timeline. Go to the views concept article to be inspired by this flexibility. Let's create a view to see the status of your user stories in the backlog.
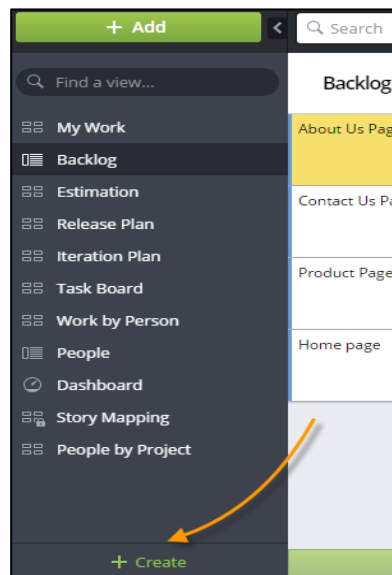
a. Click on the "**+Create**" button at the bottom of the Views list and select "**Board**" option.

Build the "**User Story Progress**" view. Start typing "User ..." in the search on the templates tab. Find the "User Story Progress" template. Click on it to choose the template and then on the blue "Setup" button to finish building.
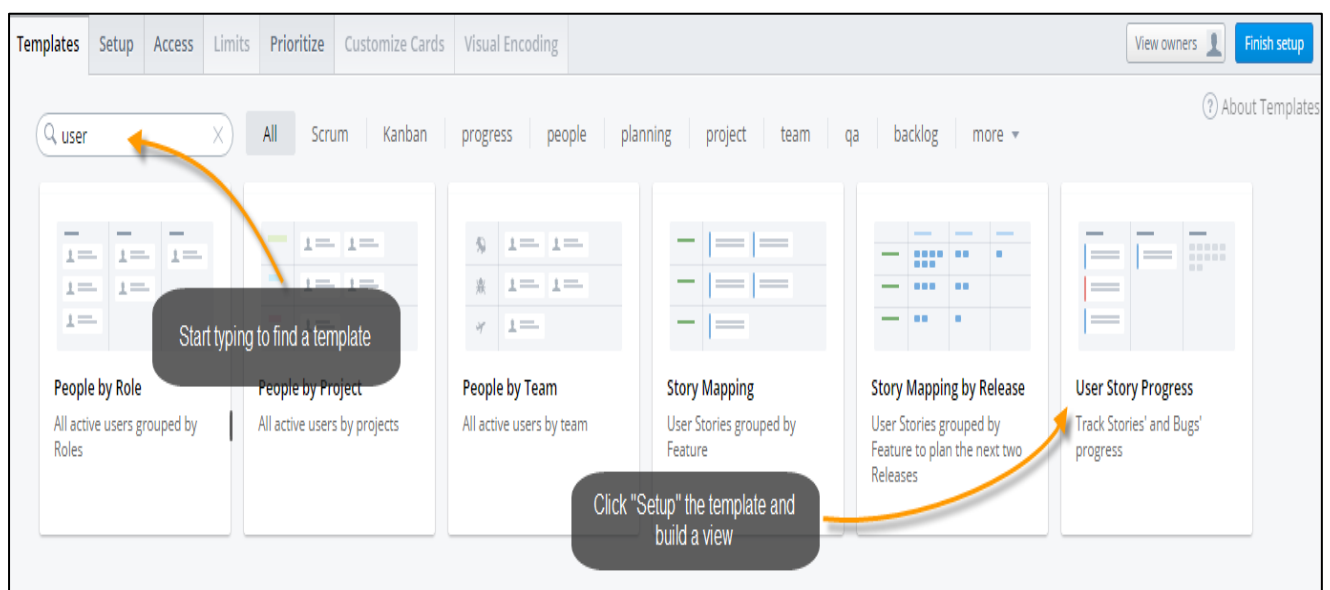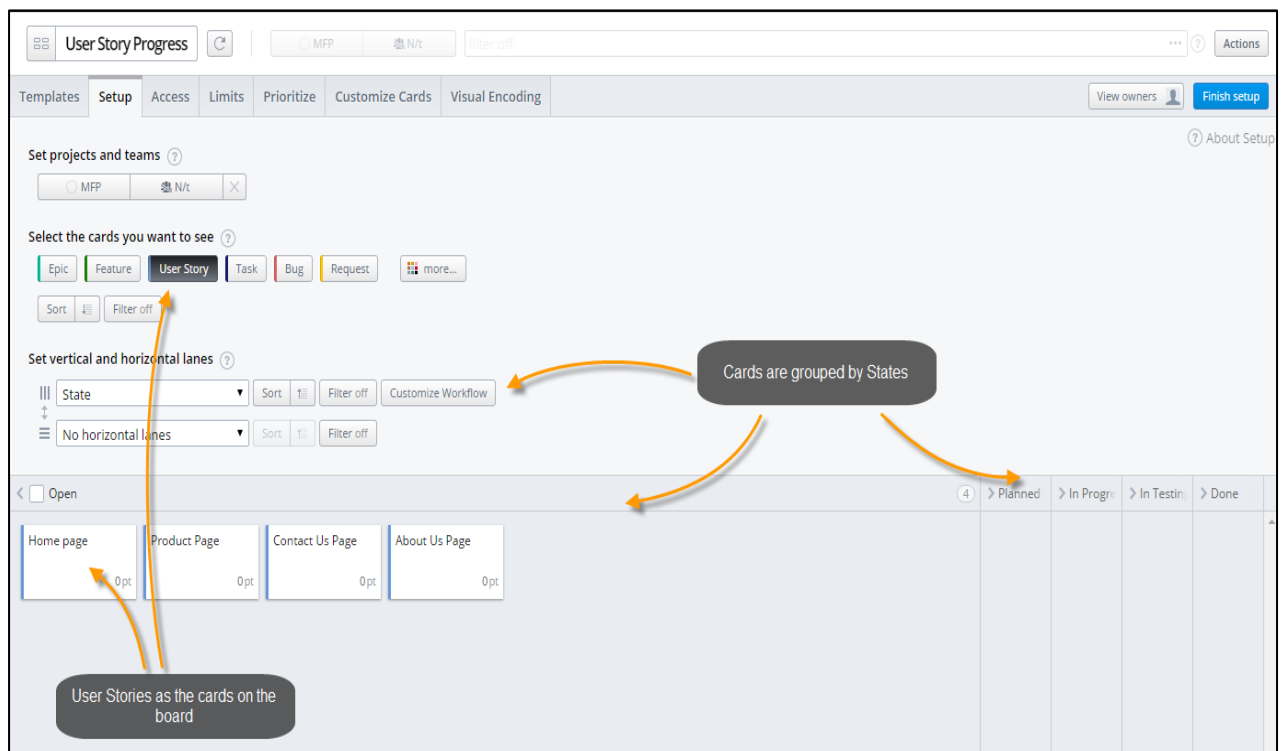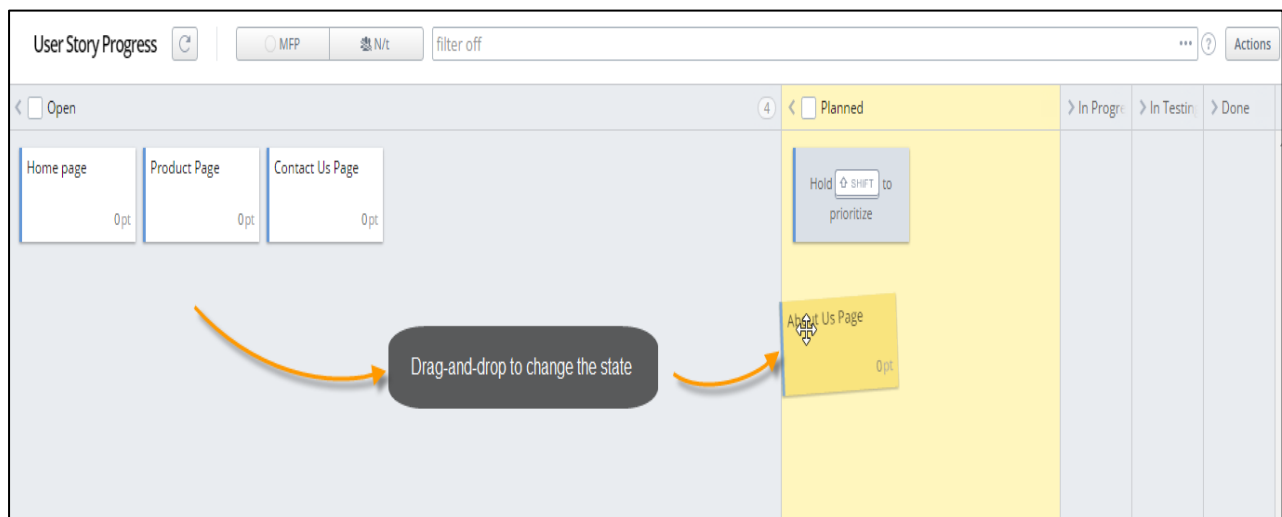
b. Now you have created your first view. Here you see user stories as cards which are grouped by state.

   Note: On any view you can change vertical or horizontal lanes, prioritize the cards, filter the cards or lanes or give others access to this view.
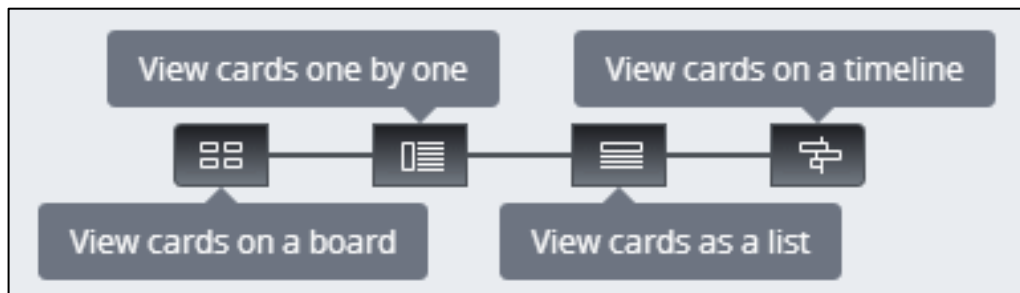

c. Close the view **setup** and get to work by moving your **cards** through the workflow.

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d. Switch between four unique view modes to visualize your user stories in different ways.

Use Actions > View type buttons for this purpose.

For further details refer the following links:

- People allocations solution
  https://www.youtube.com/watch?v=h5ZrgsNCS-o

- Scrum one team solution
  https://www.youtube.com/watch?v=vHsPl_7m_uY

- Test management solution
  https://www.youtube.com/watch?v=6ritDFCMDbg

- Scrum process
  https://www.youtube.com/watch?v=EaqCxDmEeSw

- Backlog management
  https://www.youtube.com/watch?v=-2A3jMgD_r0

- How to add users
  https://www.youtube.com/watch?v=v8CBBtdX0j0

- Iteration planning
  https://www.youtube.com/watch?v=fMDMK-l3YWo