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Track and plan a Bluemix DevOps Services project

Last updated: 24 August 2015

Time: 30 minutes

You can manage any type of project with an agile approach by using the Track & Plan feature in IBM® Bluemix™ DevOps Services. The Track & Plan tools simplify project planning and speed your workflow. For example, you can drag work items from one project phase to another, such as from your project backlog to a sprint.

In this tutorial, you create a public, agile project that uses a Git repository. After you add the Track & Plan feature to the project, you plan a chat page for a website by creating and managing work items, triaging your backlog, and planning sprints.

Summary of steps

Before you begin	Set up a project	Create your first work items	Create parent and child work items	Triage the backlog	Plan Sprint 1	Work through the sprint	Summary

Before you begin

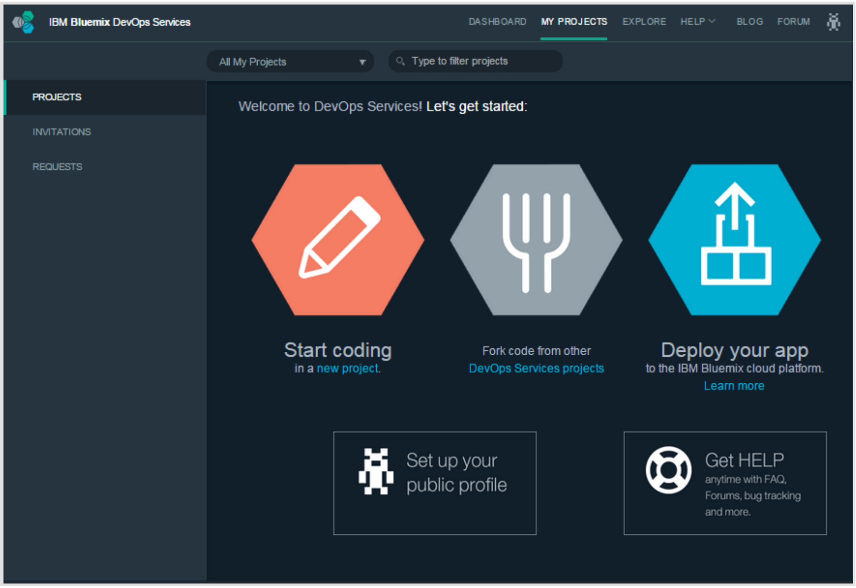
To do this tutorial, you need a DevOps Services account and a Bluemix account. The accounts are free and provide access to everything you need to develop, track, plan, and deploy apps. Signing up is simple: when you sign up for DevOps Services, you can also sign up for a trial of Bluemix.

SIGN UP
for DevOps Services (https://login.jazz.net/psso/proxy/jazzregister?redirect_uri=https%3A%2F%2Fhub.jazz.net%2F)

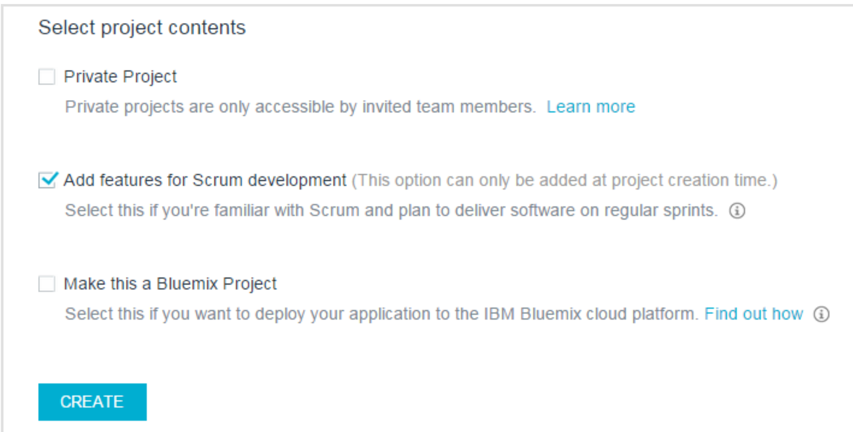
You can use the Track & Plan feature with all of your public DevOps Services projects at no cost. If you use the feature with private projects, a fee might apply. For more details, see the Pricing page (https://ace.ng.bluemix.net/#/pricing).

Set up a DevOps Services project

1. Sign in to DevOps Services (https://hub.jazz.net). Your Projects page opens.



2. Start a new project by clicking the **Start coding** icon.
   If you see a list of projects instead of this page, click **CREATE PROJECT**.
3. Name the project `ChatPage`.
4. Create a repository for your code by clicking the **Create a new repository** icon.
5. Choose your repository location by clicking the **Create a Git repo on Bluemix** icon.
6. Clear the **Private** check box.
   DevOps Services supports both public and private projects. Anyone can access your public projects, but only the DevOps Services users who you invite can access your private projects.
7. Ensure that the **Add features for Scrum development** check box is selected. By enabling Scrum development, you can create sprints from your project's backlog of work items.
   Note: To use the full Track & Plan capabilities, you must enable Scrum development. However, if you plan traditional projects that use simple tasks and iterations without a backlog, clear this check box.
8. Ensure that the **Make this a Bluemix Project** check box is cleared.
9. To set up your project and go to the Overview page for the ChatPage project, click **CREATE**.



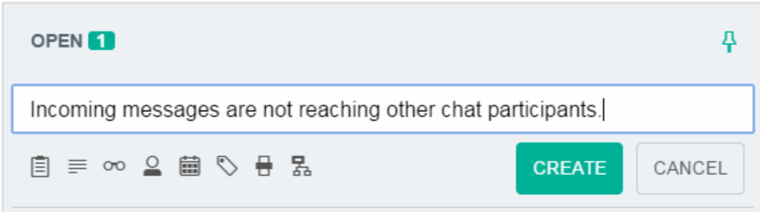
10. To include other people in your project, click **Invite others to join your project**, enter their email addresses, and click **INVITE**.

Create your first work items

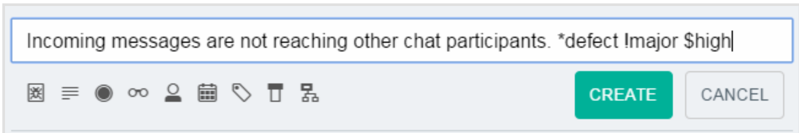
1. Click **TRACK & PLAN**.
2. Review the My Work view. From this view, you can see any project work items that are assigned to you. Because you're the only person working on this project, assign ownership of all work items to your alias. The fastest way to do this is to create your work

items from this view.

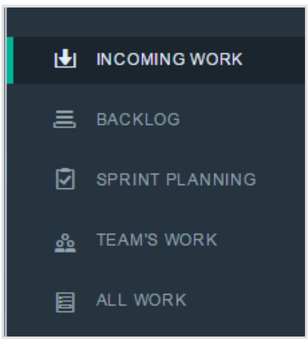
3. In the **Create a work item** field, type a summary for the first work item: `Create a simple chat page for our site.` Press **Enter** to create the task.
   Note: The default work item type is **Task**.
4. Add more attributes to your task. Click the **Priority** icon to set the priority to **High**.
5. Click the tag icon and in the tag field, type `website`. To assign the tag, press **Enter**.
   Tip: A tag can help you group related work items. For example, you can use the filtering options to view only the items that have a certain tag.
6. In the **Type a work item summary** field, enter the summary for the next work item: `Incoming messages are not reaching other chat participants.`
7. Hover over the icons that are under the summary.



   You use these icons to set the work item attributes. Don't worry if you aren't sure about an attribute or think one might change. You can always change attributes later.
8. Use the icons to set these parameters for the work item:
   - Set the type to **Defect**.
   - Set the severity to **Major**.
     Note: You can assign severity only to defects.
   - Add a tag named `messages`.
   - Set the priority to **High**. Note that when you set an attribute, the text code for that attribute is added after the summary.



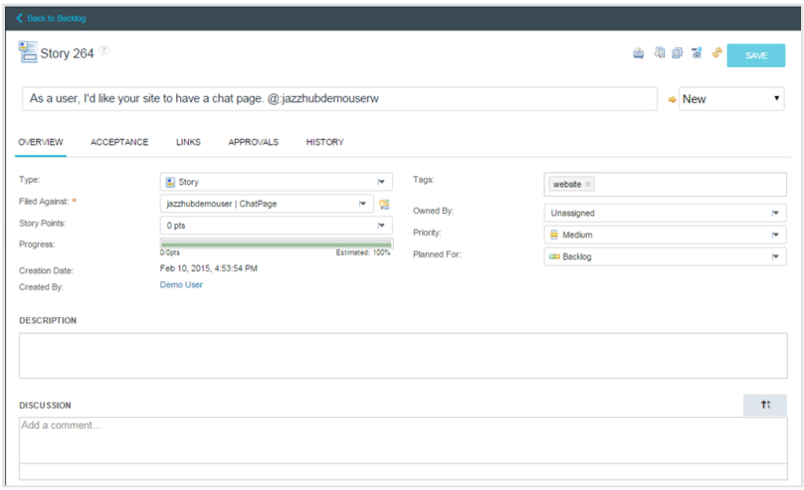
9. When you're finished, click **CREATE**.
10. Click **Incoming Work** and evaluate your new work items. They are ranked by severity so that you know which tasks are most important. You can either send incoming work items to your backlog to be included in a sprint <img class="inline" src="images/triagetobacklog.gif" alt="Send to backlog icon""> or you can delete them, which marks the work item as invalid and moves it to the **TRASHED** section.



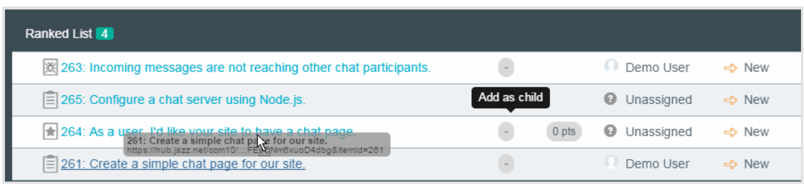
11. For each work item, click the **Triage to Backlog** icon.

Create parent and child work items from the backlog

1. Create a story for your project:
    1. Click **Backlog**, and then click in the **Create a work item** field.
    2. Type a summary for the next work item:
       `As a user, I'd like your site to have a chat page.`
    3. Use the icons to set the attributes. Make yourself the work item's owner, add a `website` tag, and set the priority to **Medium**.
    4. Confirm that the work item type is "Story." If the type is not story, click the **Task** icon and then click the **Story** icon.
    5. Click **CREATE**.
2. Assign child work items to your story.
    1. Click the summary of your story, "As a user, I'd like your site to have a chat page," to open the work item editor.
       Tip: You can change most of the attributes on the **OVERVIEW** tab.

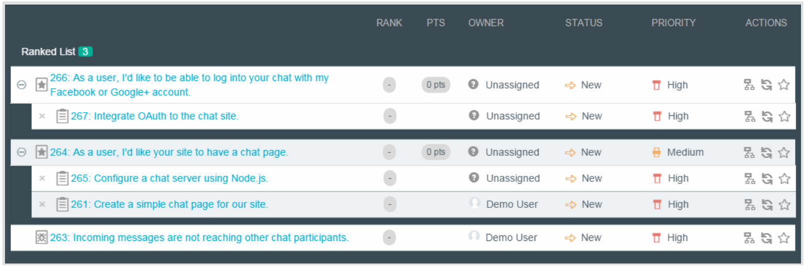
       

    2. Click the **LINKS** tab, and then click the down arrow icon next to **Add Related**.
    3. Scroll down and select **Add Children**.
    4. In the search field, type `chat page`. From the results, select "Create a simple chat page," and click **OK**.
    5. Click **SAVE** and then click **Back to Backlog** .
    6. Click in the **Type a work item summary** field and type
       `Configure a chat server using Node.js.`
    7. Slowly type `*task` to assign the task type. When you type the asterisk (`*`), notice how the **Type** drop-down menu appears.
       Tip: You can enter most of the attributes by typing their text code instead of using the mouse.
    8. Enter these attributes:
        - *@:< yourAlias >*
        - #server
        - $high
    9. Click **CREATE**.
    10. Make the "Configure a chat server using Node.js" task a child of the "As a user, I'd like your site to have a chat page" story. Click the task's title field and drag the task to the story's title field.

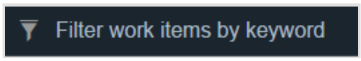
3. Add a few more work items to complete this project.

1. Add the following work items and attributes by using the method that you like best.
   - `As a user, I'd like to be able to log into your chat with my Facebook or Goo`
   - `Integrate OAuth to the chat site. *task #login #website $high`
2. Make the new task a child of the new story, "As a user, I'd like to be able to log into your chat with my Facebook or Google+ account."
3. Refresh your browser and then click the plus signs (+) next to your story summaries to expand your parent work items. Your backlog should look like this image:



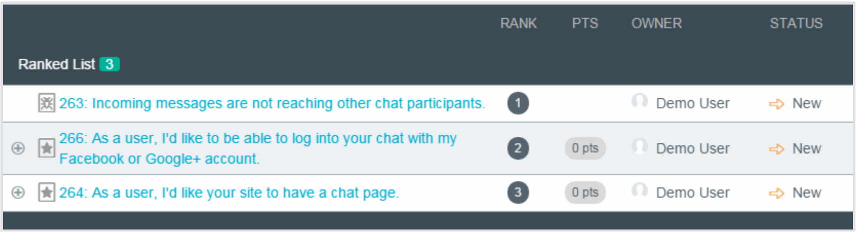
Triage the backlog

1. Finish assigning work items owners.
   1. In the Filter work items by keyword field, type `@:unassigned` and click **SAVE**.



   2. Next to your story summary, click the plus sign (+).
   3. For each work item, click the **Owner** icon and select your name from the list. After you assign your items, click in the filter field and click the **X** to clear the `@:unassigned` filter. When you work with other team members, you can use this method to assign related work items to them.
      Tip: If you want to see this view again, click **SAVE** to store it as a custom view.
2. Create time estimates to ensure that you assign an appropriate number of stories to a sprint.
   1. Click in the title field of the "Integrate OAuth to the chat site" item. For the menu that opens, click **Estimate: Unassigned**.
      Tip: When you create estimates, remember to review your story points and work item owners.
   2. Set the duration to 3 days and click **OK**.

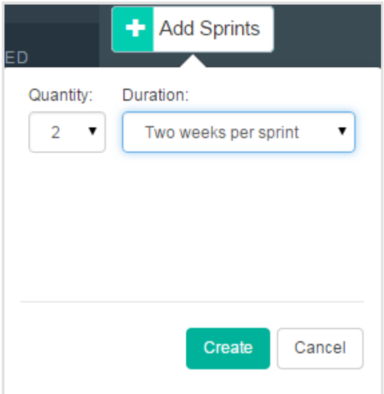
   3. Assign 3-day estimates to your defect and remaining tasks.
3. Before you assign work items to a sprint, rank the work items in your backlog.
   1. Collapse the parent items and notice how each work item's rank is not ranked. You can easily change this status.
   2. Drag the "Incoming messages are not reaching other chat participants" task to the top of the list and see how its rank changes to 1.
4. Rank the rest of the work items in this order:



5. Assign story points to the stories. In agile projects, story points are a team-determined scale that reflects the effort required to implement a story. Next to each story, click **0 pts** and select **20 pts** from the list.
   Note: You can expand each story by clicking the plus sign (+) to review its child items.

Plan Sprint 1

1. To start creating sprints for your project, click **Sprint Planning** and then click **Add Sprints**. From the **Quantity** and **Duration** lists, select two 2-week sprints.
   Note: Only a project owner or project admin can create and edit sprints.

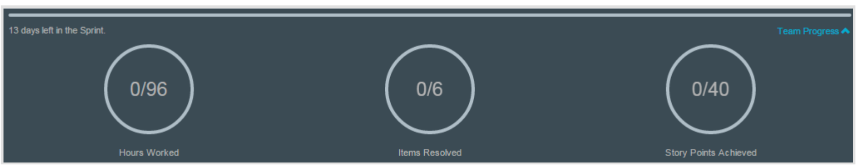


2. Click **Save**. Lanes for your backlog and for Sprint 1 are shown. Scroll to the right to see Sprint 2.
3. In the backlog lane, click the title bar of the "Incoming messages are not reaching other chat participants" defect and drag it to the Sprint 1 lane.
4. Next to each story, click the plus sign (+) to show the child tasks.
5. Drag the rest of the work items to Sprint 1 in ascending order by rank.

Work through the sprint

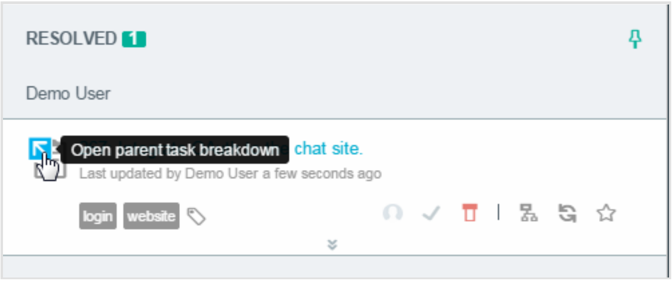
You set up your sprint and are ready to start work.

1. To see the entire team's work for the current sprint, click **Team's Work**. This view is useful when you share work because work items are grouped by owner and you can see who owns which tasks.
   Tip: To view another sprint, click **Sprint 1 (Current Sprint)** and select a sprint.
2. To see the number of hours worked, items resolved, and story points achieved, click **Team Progress**.



3. Click **My Work**. Because you own all of the tasks and haven't started working on them, you can see all of them in your Open lane.
   Note: If you do not see both the Open and In Progress lanes, click the **Display as Lanes** icon to switch from the list view.

4. For the "Integrate OAuth to the chat site" task, click the **Status** icon and from the menu that opens, click **Start Working**.
5. Notice how this item moves from the Open lane to the In Progress lane.
6. As you work on your tasks, update the number of hours spent on each task. Find the "Integrate OAuth to the chat site" task and click in its title bar to expand the menu. Use the **Time Spent** option to show that you spent 16 hours on the task.
7. Close the "Integrate OAuth to the chat site" task by clicking the **Status** icon and click **Complete** from the menu.
   Tip: You can close a task from the Team's Work view, too. You might find the ability to assign hours and complete tasks useful during your daily scrum meeting.
8. Find the "Integrate OAuth to the chat site" task. Click its **Open parent task breakdown** icon.



9. Review the contents of the task view. You completed the only task that is associated with this story, so you can resolve the story.
10. Click **Back to My Work**.
11. For the "As a user, I'd like to be able to log into your chat with my Facebook or Google+ account" story, click the Status icon. Resolve the story by clicking **Set Done** from the menu.
12. Create work items and address them.
    1. Click **Incoming Work**.
    2. Click in the **Create a work item** field and create three work items:
       1. `As a user, I'd like your chat site to look good on my phone. #mobile $low`
       2. `Test site on mobile devices and optimize Bootstrap and CSS files to improve`
       3. `The server handles the requests too slowly. *defect #server $high !major`
    3. Send all of the work items to the backlog by using the **Triage to Backlog** icon.
    4. Take a second look at the work items that you just created. The defect seems pretty important. Click **Sprint Planning** and drag the defect from the Backlog lane into the Sprint 1 lane.
       Tip: If you are leading a team, you can triage new work items in the Incoming Work view and the Backlog view during your sprints.

Summary

You have a good overview of the Track & Plan feature and see that you can use it to track any type of project, no matter how small or complex.

Next steps

To learn more about the Track & Plan feature, see Track and plan (/docs/trackplan).
