How to use this template

⚠

Sign into Notion and duplicate the template using the following link:
https://www.notion.so/willhelliwell/Team-Workflow-and-Project-Planning-Template-0b5fc85e4f904a77a68477c630491a6b

⚠

Intro

This template will help keep you and your team on track with everyday tasks and larger projects. The template is split into 10 different areas.
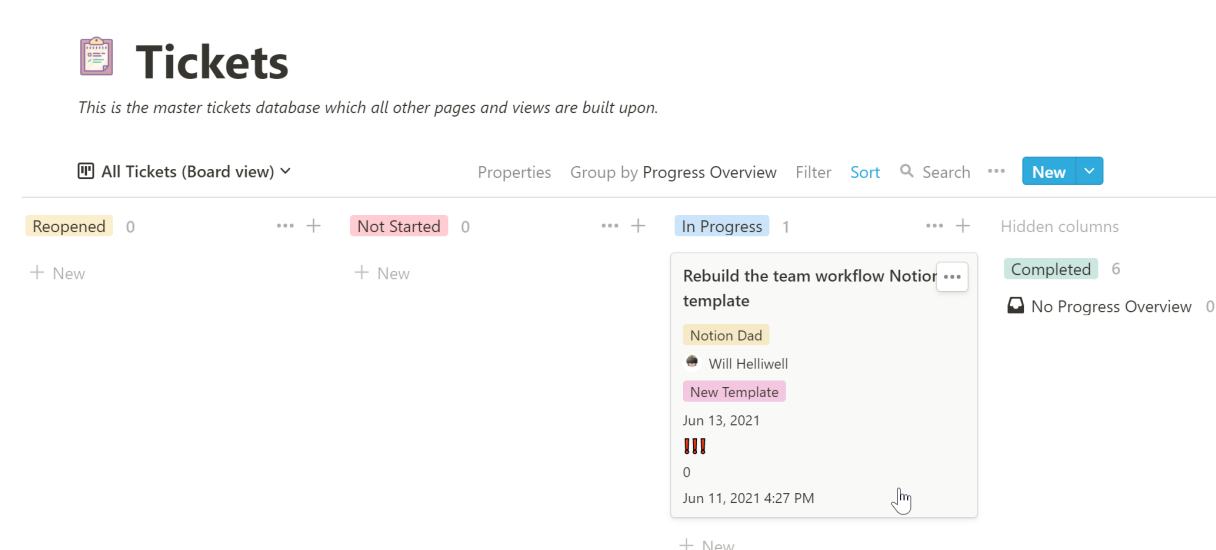
Overview of Pages

Tickets

The tickets page is the master database where all your tasks live. This gives you a view of all your tickets, no matter who they're assigned or if they've been

completed. It's an archive of every ticket that was ever raised.

Tickets can be Reopened, Not Started, In Progress, or Completed. The completed tickets are hidden over on the right hand side because there will be an ever-growing number of them. Keep an eye on the "No Progress Overview" below the completed section. Tickets can appear here and be lost from the main view if the Progress Overview isn't set.

📋 Tickets

This is the master tickets database which all other pages and views are built upon.

All Tickets (Board view) ⌄		Properties Group by Progress Overview Filter Sort 🔍 Search ⋯ New ⌄

Reopened 0 ⋯ +	Not Started 0 ⋯ +	In Progress 1 ⋯ +	Hidden columns
+ New	+ New	Rebuild the team workflow Notion template ⋯	Completed 6
		Notion Dad	🖼 No Progress Overview 0
		🧑 Will Helliwell	
		New Template	
		Jun 13, 2021	
		❚❚❚	
		0	
		Jun 11, 2021 4:27 PM	
		+ New	

This Week's Tickets

This view shows all the tickets that are being worked on or are scheduled to be worked on this week. The view is based on weekly sprints where team members can plan their work for the week. We'll go over sprints more a bit later.

This Week's Tickets

↗ 📋 Tickets   + Add a view   Filter   🔍 Search ⤢ ⋯ **New** ⌄

Reopened 0	Not Started 0	In Progress 1	Hidden columns
+ New	+ New		Completed 0

Rebuild the team workflow Notion template

👤 Will Helliwell

Notion Dad

Jun 13, 2021

▮▮▮

New Template

Team Workflow Template

📥 No Progress Overview 0

+ New

Tickets In Testing

This view is a bit different and shows a table instead of a Kanban board. Any tickets that are being tested or need testing will show up in here. The filter that's applied shows all tickets where Progress Stage is set to **QA Testing**.

Tickets in Testing

↗ 📋 Tickets   + Add a view   Filter Sort 🔍 Search ⤢ ⋯ **New** ⌄

Aa Ticket Title	👤 Assignee	⊙ Client	⊙ Product	≔ Ticket Type	↗ Epic	↗ Re
Create the wiki page	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team workflow template	📄 B your
Create the Sprint Carryover page	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team workflow template	
Create the Epics page	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team workflow template	
Create the backlog database	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team workflow template	
Create the sprints database ⤢ OPEN	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team workflow template	
Create the tickets	👤 Will Helliwell	Notion Dad	Team Workflow Template	New Template	📄 Build a new team	

Completed Tickets

This is a table view showing all the tickets with a Progress Overview status of completed. These are ordered by the last edited property so you can see the most recent tickets at the top.

Completed Tickets

↗ 📋 Tickets

Aa Ticket Title	👤 Assignee	◎ Client	◎ Product	◎ Progress Overview	☰ Progress Stage
Create the wiki page	🧑 Will Helliwell	Notion Dad	Team Workflow Template	Completed	QA Testing
Create the Sprint Carryover page	🧑 Will Helliwell	Notion Dad	Team Workflow Template	Completed	QA Testing, To Be Documented
Create the Epics page	🧑 Will Helliwell	Notion Dad	Team Workflow Template	Completed	QA Testing, To Be Documented
Create the backlog database	🧑 Will Helliwell	Notion Dad	Team Workflow Template	Completed	QA Testing, To Be Documented
Create the sprints database	🧑 Will Helliwell	Notion Dad	Team Workflow Template	Completed	QA Testing, To Be Documented

Sprints

The sprints page is where you can see all the work that is planned for the upcoming weeks. Each sprint shows the date range that the sprint will last and the estimated hours based on all the tickets inside that sprint. A sprint is usually one week but you can plan each sprint to be as long as you like.

If you know, as a team, you complete around 50 points worth of work each week, you can make sure you don't schedule in more work than you can take on.

📅 Sprints

Plan the work for the coming weeks and look back on the work you've completed.

+ Add a view   Properties Filter Sort 🔍 Search ⋯ **New** ⌄

Aa Sprint	⊙ Status	📅 Date Range	↗ Tickets In Sprint	🔍 Estimated Total Hours	☰ Goals
📄 2	Planned	Jun 21, 2021 → Jun 25, 2021	📄 Rebuild the team workflow Notion template	8	
📄 1	Completed	Jun 07, 2021 → Jun 11, 2021	📄 Create the tickets database 📄 Create the sprints database 📄 Create the backlog database 📄 Rebuild the team workflow Notion template 📄 Create the Epics page 📄 Create the Sprint Carryover page 📄 Create the wiki page	11	Finish building the ticket workflow and all the databases.

+ New

COUNT 2

Backlog

The backlog page shows all the tickets that haven't been placed in a sprint and are not assigned to anybody. The filter is also set to only include tickets where the Progress Overview property is not In Progress or Completed in case somebody has done the work without including the ticket in a sprint. To move tickets out of the backlog and into a sprint, just click on the sprint property and search for the sprint you'd like to add it to.

Backlog

↙ 2 backlinks

The filter on the table is set where the Which Sprint property is not empty and where the progress overview is not in progress or completed.

↗ 📋 Tickets

Aa Ticket Title	👤 Assignee	⏱ Date Raised	📅 Due Date
Move the backlog ticket to a sprint after filling out all the info		Jun 22, 2021 7:12 PM	

+ New

Epics

Epics are large bodies of work that can be broken down into a number of smaller stories and tickets. If you have a large project on the go, this would be an epic. Add your tickets to the epic by filling out the Epic property on the ticket. The epics page will give you an overview of how far you are to completing all the work.

🗄 Epics

Epics are large bodies of work that can be broken down into a number of smaller stories and tickets.
The **Progress** property shows you how much of an epic is completed based on the points/hours estimate on each ticket.
If an epic is completed, it has a green tick. If not started, it has a red cross.

| + Add a view			Properties Filter Sort 🔍 Search ··· New ⌄	
Aa Epic Name	Σ Progress	🔍 Hours Completed	🔍 Hours Allocated	↗ Tickets In Epic
Build a new team workflow template	■■■27%	3	11	📄 Create the sprints database 📄 Create the tickets database 📄 Create the backlog database 📄 Rebuild the team workflow Notion template 📄 Create the Epics page 📄 Create the Sprint Carryover page 📄 Create the wiki page
+ New				

COUNT **1**

Sprint Carryover

The sprint carryover page shows all tickets where the property **Which Sprint** is not empty and the **Progress Overview** property is not set to **Completed**. It's used to carry tickets over from one week/sprint to the next.

Guidelines

- Moving tickets is best done on a Friday afternoon.

- If a ticket is **Not Started**, remove it from the current sprint and add it to the next sprint. If no sprint is selected, the ticket will move to the <u>Backlog</u>.

- If a ticket is **In Progress**, add it to a new sprint without removing the old one so you know it has been worked on over multiple weeks.
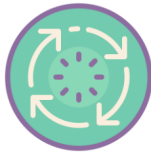
Sprint Carryover

↙ **2 backlinks**

Ordered by the sprint number. This page shows all tickets where Which Sprint is not empty and the work is not completed. Highlight the tickets you need and add them to the next sprint. If the next sprint isn't made yet, you can create it from here.

↗ 📋 **Tickets**

Aa Ticket Title	👤 Assignee	⊘ Client	↗ Which Sprint	⊘ Progress Overview
Rebuild the team workflow Notion template	🧑 Will Helliwell	Notion Dad	📄 1 📄 2	In Progress
+ New				

Knowledgebase

The knowledgebase is your wiki. Tickets that have the progress stage of **To Be Documented** attached to them will automatically appear at the top of the knowledgebase page. This is so documentation always stays up to date.

Tickets can be linked to wiki articles. You can add multiple tickets to a single article. To do so, inside the ticket, click the **Related To Wiki** property. In here you can search for the wiki article you'd like to link that ticket to.

Your Tickets

Each member of your team should have their own login to Notion. At the bottom of the main page, you'll have a heading called **Your Tickets**. Depending who is logged in, you'll see a different set of tickets.

The tickets board shows all tickets that are in the current sprint and are assigned to the logged in user.

For a ticket to appear on the board, it must be in this week's sprint.
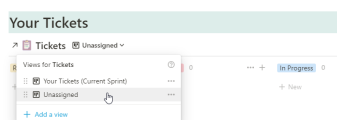
- If a ticket is in an older or newer sprint, it will appear in the **Sprint Carryover** page.

- If no sprint is attached to a ticket, it will appear in the Backlog.

- If a sprint is attached and nobody is assigned to the ticket, it will appear in the unassigned dropdown view.

Raising a New Ticket

You can use any of the pages or views above to raise a new ticket. Which ever view you're in, to raise a new ticket, click the blue New button or the drop-down arrow next to it. If you click the drop-down, select the **New Ticket** template. You can also create your own templates for specific types of ticket if you wish by clicking **+ New Template**.

When you use the New Ticket template, it will populate a few of the fields.

- The ticket will have a nice icon on it
- Progress Overview will be set to Not Started
- The page content will have a Description and Notes section ready to fill out

If you create an empty ticket, you still have the option of clicking the **New Ticket** template inside the page content where the Description and Notes headings usually live.

Understand the Ticket Properties

▼ Title

Give the ticket a short and descriptive title. For example, "Change the main menu options"

▼ Date Raised

This is an automatic property that will be set to the date and time the ticket was created.

▼ Reporter

This is added automatically. It will be set to whoever created the ticket.

▼ Raised On Behalf Of

If you created the ticket but someone asked you to do it for them, you can add them in here.

▼ Client

Choose from a list of your clients.

▼ Product

Choose from a list of your products that you have for that client.

▼ Assignee

Assign the ticket to one or multiple people on your team.

▼ Ticket Type

Is it a bug? A change a client has requested? Set it here and add any new ones you need.

▼ Progress Overview

These are the simple stages of a ticket. Not Started, In Progress, Completed, and Reopened.

▼ Progress Stage

The progress stage can be set to multiple things such as "on hold" or "to be documented". Create as many as you need.

▼ Due Date

When does the task need to be done by?

▼ Overdue

This formula automatically shows three red exclamation marks if now is past the due date.

▼ Priority

Set a priority so you know which tasks to work on first.

▼ Story Point Estimate

Assign a certain number of points to a ticket based on the effort or time it will take to complete.

▼ Estimated Hours

This is automatically calculated based on the points and is used in the epics and sprints to calculate how many hours work needs doing or has been done.

▼ Which Sprint

Choose a sprint to assign your ticket to so you can manage the workload of your team.

▼ Sprint Date

This automatically shows the date of the sprint you assigned the ticket to.

▼ Epic

Is this ticket part of a much larger project? Assign it to an epic.

▼ Parent Task

Is the ticket part of a small project that might take a day? Assign it to a parent ticket to keep all the tasks together.

▼ Sub Tasks

If you created a parent ticket, all the sub tasks will be shown.

▼ Blocked By

If the ticket is blocked by another task, list it here.

▼ Is Blocking

If this ticket blocks another one, list it here.

▼ Files

Upload any media files you might need for the ticket.

▼ Story Points Completed

This is used in the epics page to show the progress of the epic.

▼ Related To Wiki

Link your tickets to wiki articles for better referencing in the future.

▼ Last Edited

Automatically shows when the ticket was last edited.

If you would like to book a 1-to-1 consultation or training session, send an email over and we can discuss further.

Email:

📩 me@notiondad.com