How to join Trello

To join Trello and start using its unlimited and free features for tracking progress using a Kanban system, follow these steps:

1. Click on the following link to access the Trello workspace
2. Register an account by providing the required information.
3. Once registered, you will gain access to the Trello workspace.
4. Within the workspace, you will find several boards available for use.
5. Currently, a board is utilized to manage the development pipeline and the operations team's work.
6. In the future, additional functions may be implemented using Trello.

By following these steps, you will be able to join Trello, create an account, and begin utilizing its unlimited Kanban system for tracking progress.

How to use Trello efficiently

Part A: Know about Ticket

1. Be responsible for your ticket

When working with tickets in Trello, it is important to take responsibility for your assigned tickets. Here are some guidelines to follow:

1. Ticket Ownership: Everyone has the ability to write and modify tickets, as well as take responsibility for their own tickets. This means that if someone else creates a ticket for you, they may not have had the time to provide all the necessary details. In such cases, it is a good opportunity for you to review and revise the ticket, ensuring clarity and accuracy.

2. Communication and Clarification: Use ticket creation as a starting point for discussion and clarification. If the initial ticket lacks clarity or completeness, take the initiative to seek additional information or clarification from the ticket creator or other relevant parties. This helps ensure that everyone is on the same page regarding the task or issue at hand.

3. Timely Updates: It is crucial to update the status of your ticket promptly. The ticket system serves as a central management tool for all ongoing activities. By updating your ticket's status in a timely manner, you provide visibility to others regarding the progress of your task. Keep the location of the ticket updated to reflect the exact status of your work.

By following these guidelines, you can contribute to effective ticket management in Trello, ensuring clear communication, shared understanding, and accurate task tracking.

2. How to write a ticket:

a. Write a refined title

So everyone can have a basic idea of what this ticket is for. Don’t make it too long and write too much detail in it.

Bad example:
“Clone an Illinois Institute of Technology Website. Needs to be tested, deployed, and ready by 3 pm Thursday, June 8th, 2023. Beni can user-test it for you.”
“Need to be tested and deployed” is repetitive information as they are default developing processes. The ddl should be set in the DDL function but written in the title.

b. Write detail description

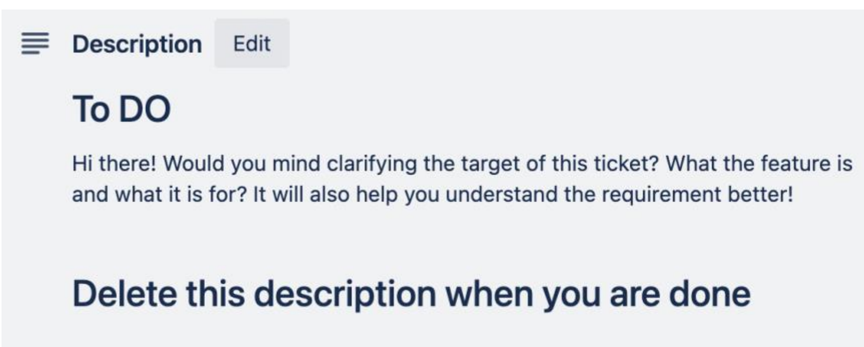
When creating a ticket in the board, a default description is generated to remind everyone to provide a detailed description. However, it is essential to delete this default description after writing a real description that includes all the necessary details. Here's why:

1. Comprehensive Information: The ticket description should contain all the relevant details about the feature or task. It should clearly outline what is desired, how it should appear, and the expected outcome. The goal is to ensure that anyone reading the description, even if they have no prior knowledge of the ticket, can visualize how the feature performs and looks like.

2. Efficient Collaboration: With multiple people working on the same feature in the pipeline, having a detailed description eliminates the need for repetitive communication and clarifications. It allows team members, including those responsible for Q&A testing, to quickly understand the purpose and requirements of the feature without spending unnecessary time seeking clarification.

3. Simplified Documentation: While it is ideal to have a formal product document for important features, resource limitations may make it challenging to implement them for every task. The ticket description serves as a simplified version of a product document, providing the necessary information to guide the implementation process.

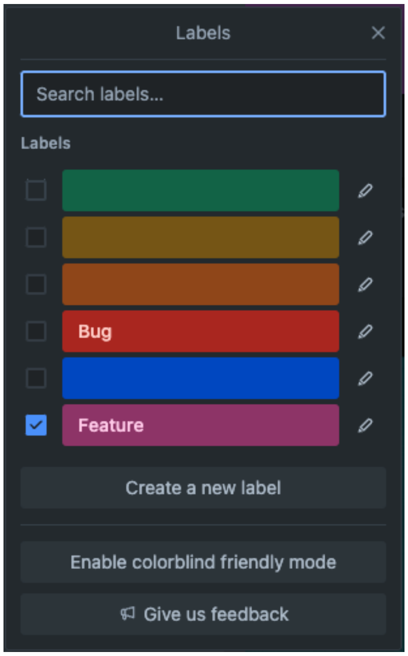
By ensuring the description is comprehensive, clear, and detailed, you can enhance collaboration, save time, and promote a shared understanding among team members. Remember to treat the ticket description as a simple but informative version of a product document, allowing all stakeholders to grasp the essence of the feature without the need for extensive communication.



One golden standard is whether a person who knows nothing about this ticket can imagine how it performs and what it looks like by only reading the description. The idea behind this standard is many people gonna work together to make one feature in the pipeline. Detailed descriptions can make sure the ticket is built correctly and also save the time of repetitive communication. For example, we don’t want people who do Q&A testing to spend too much time on understanding what the feature is.

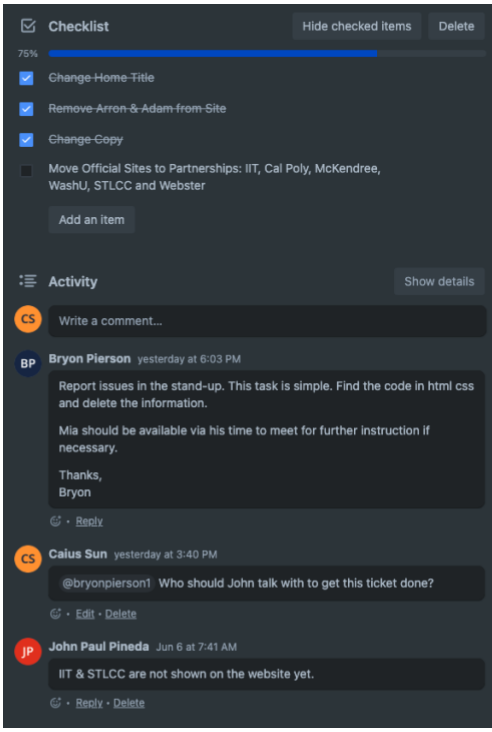
c. Label

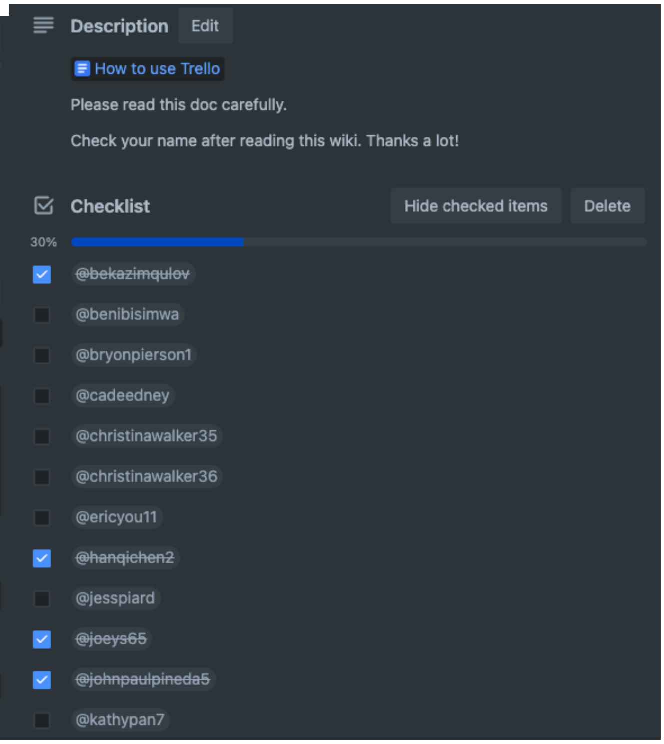
We have two labels, feature, and bug. Try to use them every time. New labels will be added later.



d. Comments

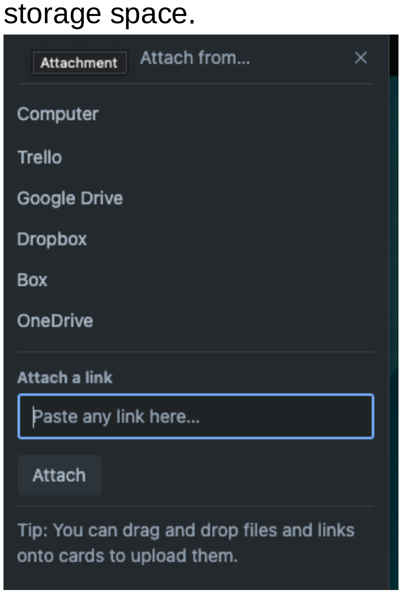
We can use comments to send notifications to stakeholders. For example, this ticket was moved to a Blocked list because it needs support to continue. @ the stakeholder can help us keep everyone on the same page.





e. Attachment

We can attach the repo link and working document link to the Attachment area. In this way, we can keep everyone on the same page. Use a link but attach your doc directly as we have limited storage space.



f. Dates

Setting up a DDL can always help you focus and catch up with the pace of our team.

Part B: Intro to Pipeline

1. Backlog

The backlog is where new issues are identified and turned into tickets. It's open for anyone to write down ideas, issues, and bugs they come across.
Periodically, we review the backlog to determine which tickets should be prioritized.

IMPORTANT: Join the ticket to ensure proper attribution.

For example, if you're a member of the operations team and you identify a highly requested user feature, you can create a ticket in the backlog to address it. Similarly, as a tester, if you discover any bugs affecting the user experience, you're encouraged to create a ticket to report them.

2. Design

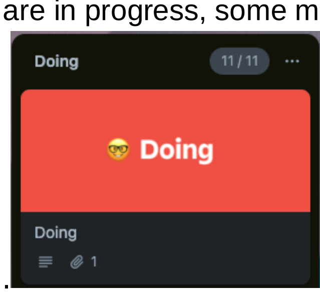
When a ticket is moved to the design list, it indicates that we've decided to develop it and need to define how the feature should look and what it is.
The design phase encompasses appearance design, product design, and technical details. A detailed description should be provided at this stage.

3. To Do

Moving a ticket to the To Do list signifies that we have a clear understanding of the desired outcome and know how to implement it.
Set a deadline (DDL) for the ticket and assign it to a developer before moving it to the Doing list.

4. Doing

Each person should focus on one ticket at a time.
The number displayed (e.g., "11" in the image) represents the current number of developers, and we should not exceed the maximum number of tickets in progress (e.g., 11). If more tickets are in progress, some may have been placed here incorrectly.



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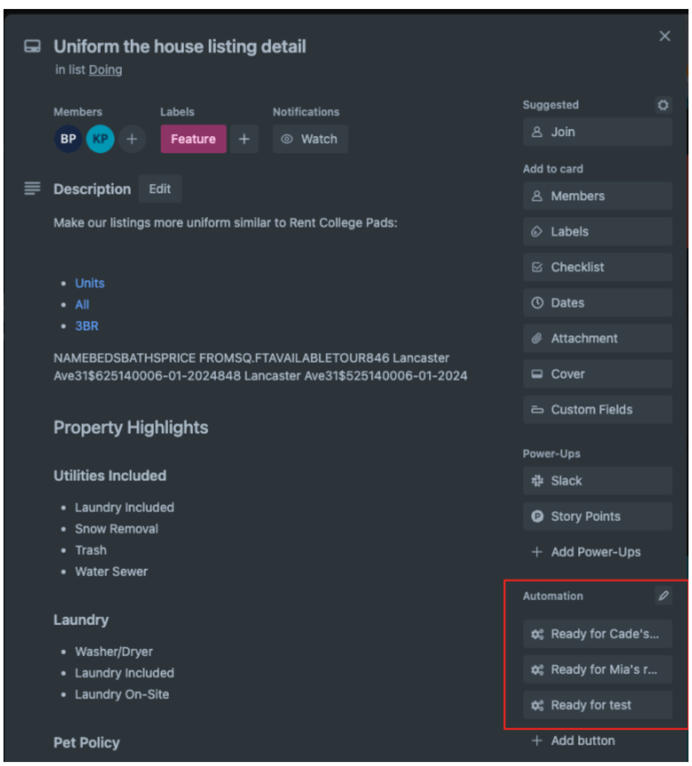
5. Pending - blocked

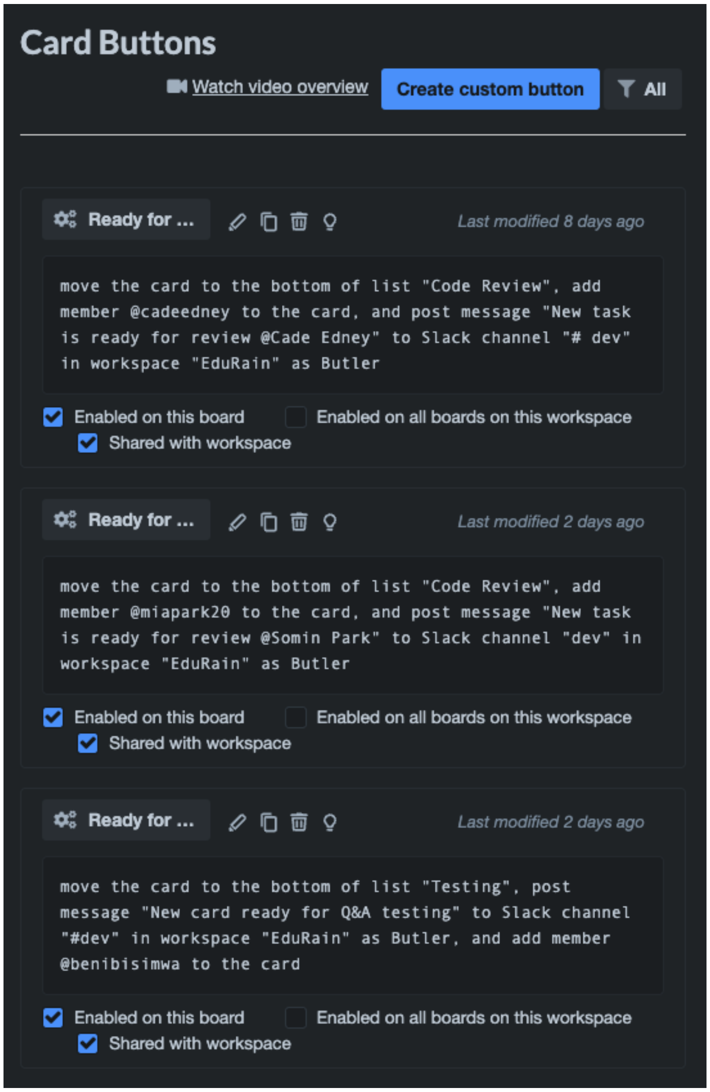
Inevitably, there are situations where significant blocks can halt development work. These blocks can be technical issues requiring support from a tech lead or resource-related issues that necessitate external assistance. In such cases, you have the option to move your ticket to a designated area and shift your focus to another ticket. This allows for efficient utilization of time and resources while awaiting resolution of the blocking issue.

6. Code review

Once your code is completed, you can move it to the code review column to prepare it for deployment. Alternatively, you have the option to automate this process using Trello's Automation feature. In the image, there is a red square area that showcases two automation rules that can be configured to execute actions automatically. For a more detailed understanding of how Automation works, please refer to the second image.

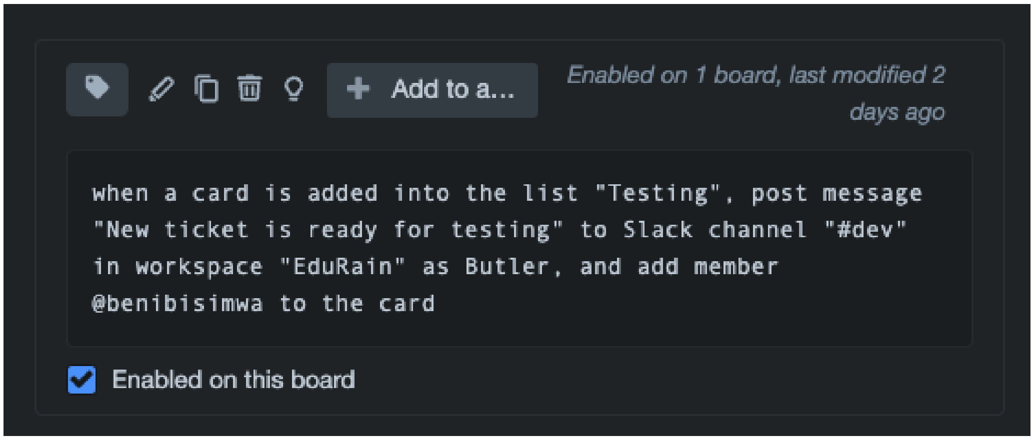
After the code review is conducted and any necessary adjustments are made, the code should be pushed and reviewed by the tech lead for merging it into the main branch. Once the code is deployed, the tech lead should move it to the testing list to initiate the testing phase.





7. Testing

Beni has been assigned the responsibility of handling all Quality Assurance (Q&A) testing. When a ticket is moved to the testing list, an automated process ensures that Beni is automatically added as a member to the ticket.



During Q&A testing, the tester does not need to manually move the ticket back to the Doing list. Instead, there are specific actions to be taken depending on the testing outcome:

1. Issue with New Feature: If the new feature is not functioning as expected or fails to meet the requirements stated in the description, the tester should contact the developer. The developer will then move the ticket back to the Doing list and make the necessary changes before re-deploying it. This ensures that the feature undergoes further development and refinement.

2. Small Issue Discovery: In case a tester identifies a minor issue during testing, they should create a new ticket in the backlog and provide a clear explanation of the issue. The team will then evaluate the priority of this issue and decide whether it needs immediate attention or can be addressed later. This helps in effectively managing and prioritizing bug fixes or improvements.

3. Ticket Movement to Done: Once testing is completed, and no further issues are found, the tester should move the ticket to the Done list. This indicates that the ticket has passed the Q&A testing phase and is ready for further stages of the development process.

By following these guidelines, the testing process remains organized, and issues are appropriately addressed, ensuring the smooth progression of tasks and efficient collaboration between developers and testers.