

# TargetProcess:Planning

## User Guide

### v.1.0 (draft)

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TargetProcess:Planning 1.0 is a web-based project management tool that powers agile software development processes, focusing on Project Planning and Tracking practices. TargetProcess supports Extreme Programming and other modern methodologies.

## Login

After TargetProcess:Planning system installation, you could login using the following access parameters:

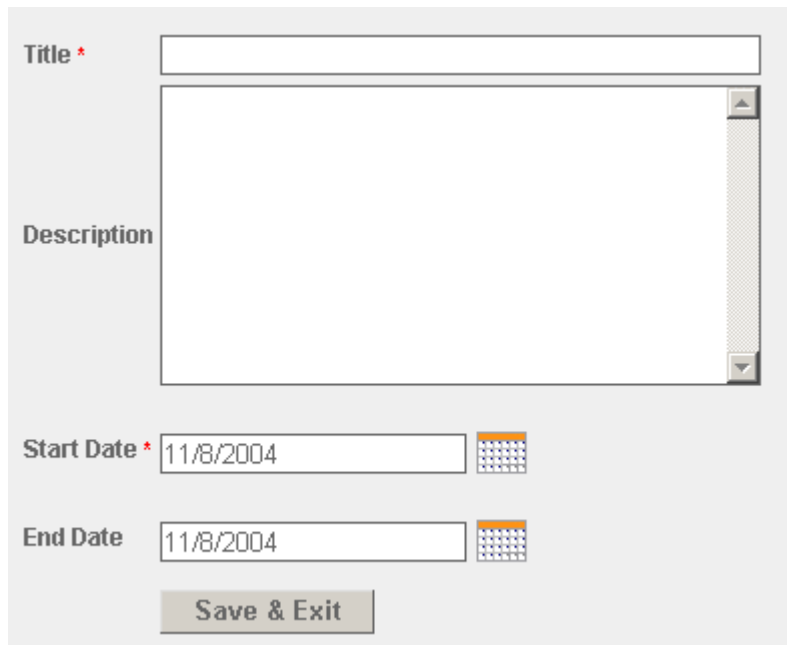
Page: **http://<your domain>/login.aspx**

Login: **admin**

Password: **admin**

## Add Project

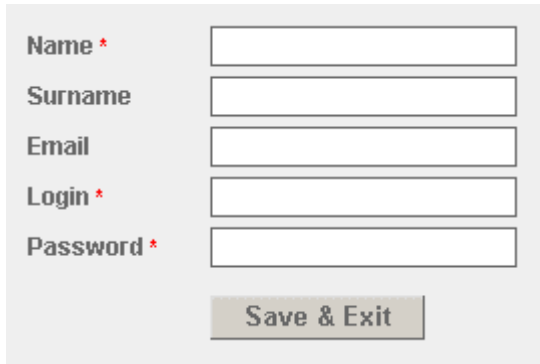
On the first step, you should add new project. Login into the system and click **Add Project** link on the left. The new window will appear:



Fill project **Title** and **Start Date** fields (**End Date** is not a mandatory field, since it quite possible that projects might not have deadline) and push **Save & Exit** button. The page will be reloaded and new project will appear in the list.

## Add Users

Project teams can be formed from system users. To add required users, login into the system and click **Users** link on the top right corner of the screen. Then click **Add User** link. New window will pop-up.

A screenshot of a web form for adding a new user. The form is contained within a light gray rectangular box. It features five input fields stacked vertically, each with a label to its left. The labels are 'Name \*', 'Surname', 'Email', 'Login \*', and 'Password \*'. The 'Name' and 'Login' labels have a small red asterisk. Each input field is a simple white rectangle with a thin gray border. Below the input fields, centered, is a button with the text 'Save & Exit' in a gray font. The button has a light gray background and a thin gray border.

Fill **Name**, **Login** and **Password** fields and push **Save & Exit** button. TargetProcess is not intended to be used in high-secure environments. We believe that good team can not be build without trust, so there is no different permissions in TargetProcess:Planning. However, user roles might be added in future to make interface more usable.

# Project Planning: First Release

When you have added the project and system users, it is time to start project plan creation. TargetProcess:Planning supports iterative development.

Iterative project planning approach described in many sources. We recommended “*Planning Extreme Programming*” book by Kent Beck, Martin Fowler [<http://www.amazon.com/exec/obidos/tg/detail/-/0201710919/002-5598678-3693648>] if you don’t know how to start. The other sources are in [Appendix A](#). Basically, agile planning process consists of the following steps:

1. **Create User Stories.** Estimate each User Story using any kind of abstract units. It may be hard to understand first time, but in general it is not important what kind of unit you are using. The main idea is that units will remain the same during the whole project. For example, you may measure effort in “green frogs”. Let’s say, “Internationalization feature” may take 15 “green frogs” to implement and “Users Authentication” just 4 “green frogs”. Only two things are important:
  - a. Effort units will remain the same during the whole project
  - b. Iterations’ **Velocity** measures in the same effort units
2. **Create a Release** with Start and End dates
3. **Split the Release on several Iterations of equal length** (it is recommended to make iteration from 2 weeks to 1 month length, depending on your environment and project size)
4. **Assign several most valuable or risky User Stories** on the first iteration
5. Complete as many User Stories as possible during the first iteration and **define first iteration’s Velocity**. The iteration velocity is just the sum of all implemented User Stories’ effort during the iteration. For example, during the first iteration (Iteration #1) you have implemented the following User Stories:
  - a. Users Authentication – 4 “green frogs”
  - b. Users’ contact information management – 3 “green frogs”
  - c. Forms validation – 2 “green frogs”
  - d. Internal mailing engine – 7 “green frogs”

The Velocity of the first iteration will be

$$\text{Velocity} = 4+3+2+7 = 16 \text{ “green frogs”}$$

Then you set the velocity of the next iteration based on velocity of the previous iteration. It is reasonable to suppose that your team will do at least as much as it was in previous iteration. In our case, the predicted velocity of Iteration #2 will be exactly 16 “green frogs”.

That’s all in fact. You get serious advantages using this iterative approach:

- You can predict with very good probability how much tasks project team will accomplish during the next iteration, and you can make fair prediction about the true release date.

- The most valuable features and requirements will be implemented first. This is a good thing for customer and for the project as well.
- You can easily change the plan based on customer real needs. System requirements **will change**, and change requests could be handled much more effectively.

Let's check how TargetProcess can help you in agile project planning.

## Create Project Team

Project team may be created from the all available system users. So if you want to add new team member that does not have system account, you should create a new account first, as described in [Add User](#) section.

To create project team, choose the project from the projects list and click **Team** link



All users		Team members
Mike Leb Korny Fisher	Add To Team >	Ted Kein
	< Remove From Team	
Assign		

The interface is quite straightforward. Use **Add To Team** and **Remove From Team** buttons to build a team. Push **Assign** button to apply changes. *Note: the assignments will not be accepted if you don't push the **Assign** button.*

## Add Release


Choose project and click **Add Release** link on the left. The new window will pop-up.

**Name \***


**Goal**

In this release we will create basic system (so-called walking skeleton) to prove main architectural concepts

**Start Date \***



**Finish Date**



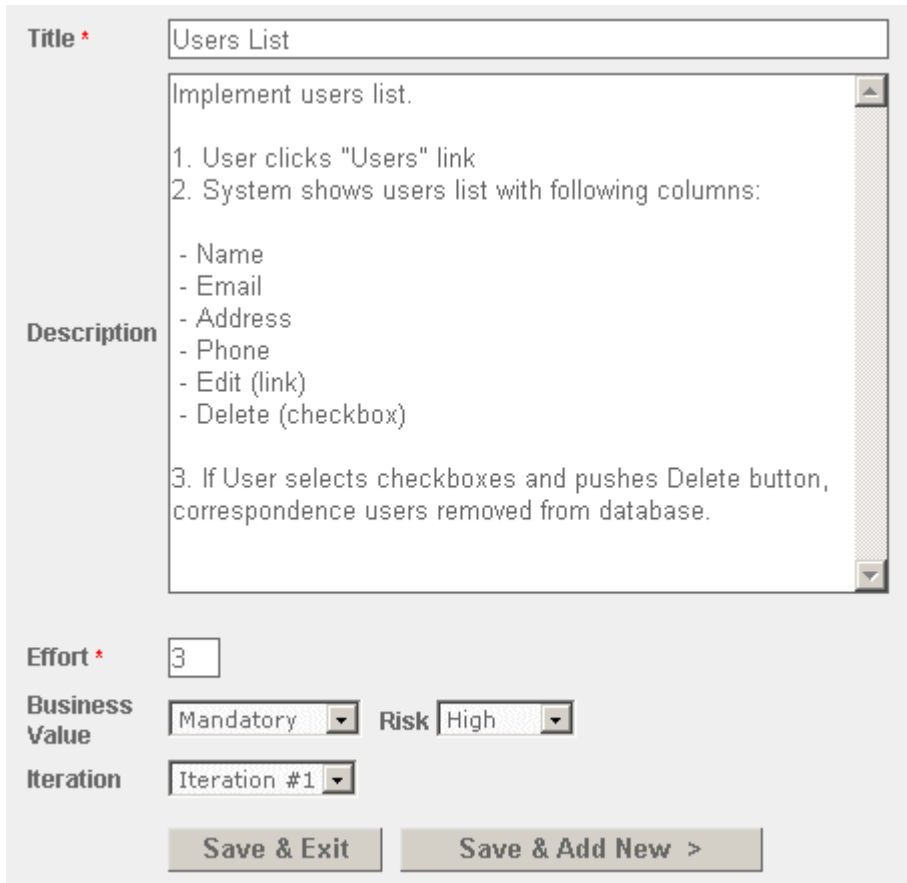
Automatically generate iterations on release creation? ☒

Iteration duration  weeks

TargetProcess may automatically generate iterations for new release. It is required to set **Start Date**, **Finish Date** and **Iteration duration** in weeks. Then push **Save & Exit** button. The system will create required iterations with default names like (Iteration #1.1). After that, you may edit iterations' parameters like **Description** and **Velocity**.

## Add User Stories

Choose the project and click **Add User Story** link on the left. The new window will pop-up.



The screenshot shows a form for creating a user story. It has the following fields and controls:

- Title \***: A text input field containing "Users List".
- Description**: A large text area containing the following text:
 

```
Implement users list.

1. User clicks "Users" link
2. System shows users list with following columns:

- Name
- Email
- Address
- Phone
- Edit (link)
- Delete (checkbox)

3. If User selects checkboxes and pushes Delete button,
correspondence users removed from database.
```
- Effort \***: A text input field containing "3".
- Business Value**: A dropdown menu set to "Mandatory".
- Risk**: A dropdown menu set to "High".
- Iteration**: A dropdown menu set to "Iteration #1".
- At the bottom, there are two buttons: "Save & Exit" and "Save & Add New >".

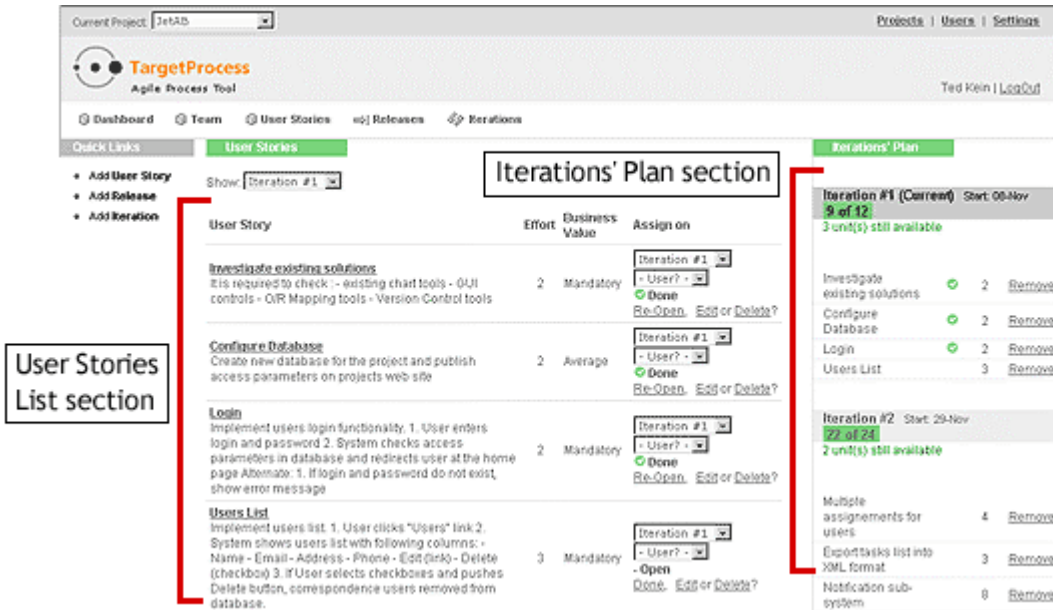
There are only two mandatory fields: **Title** and **Effort**. As described in [Project Planning: first release](#) section, effort measures in any units, for example, “green frogs”. **Description** field should contain user story’s details. It is recommended to specify sufficient details to describe what should be implemented. **Business Value** indicates user story’s value from customer’s point of view. The most valuable user stories should be implemented as early as possible. You may assign a user story on iteration using **Iteration** drop-down (by default new user story puts into Back Log).

You will usually add several user stories in a row. The **Save & Add New** button will help in this case.

## Assign User Stories on Iterations

As mentioned in [Add User Stories](#) section, you can assign user story on iteration while adding the user story. But more common practice is to plan iterations using User Stories screen. Choose the project and click **User Stories** link. The user stories screen will appear. The screen consists of two main sections: User Stories List and Iterations’ Plan as shown on the picture below:





The screenshot shows the TargetProcess Agile Process Tool interface. The top navigation bar includes links for Dashboard, Team, User Stories, Releases, and Iterations. The left sidebar has a 'Quick Links' section with 'Add User Story', 'Add Release', and 'Add Iteration'. The main content area is divided into two sections: 'User Stories List section' and 'Iterations' Plan section'.

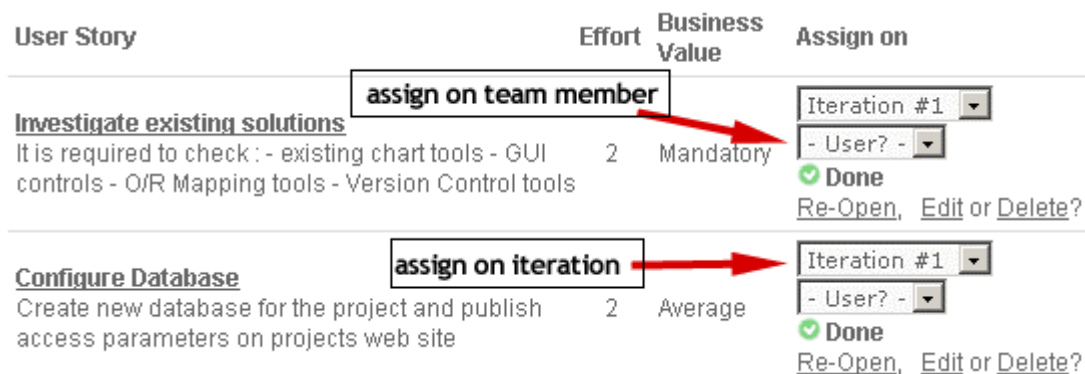
**User Stories List section:** This section displays a list of user stories. Each story has a title, a description, an effort value, a business value, and an 'Assign on' dropdown menu. The stories listed are:

- Investigate existing solutions:** It is required to check: - existing chart tools - GUI controls - O/R Mapping tools - Version Control tools. Effort: 2, Business Value: Mandatory. Assigned to: Iteration #1.
- Configure Database:** Create new database for the project and publish access parameters on projects web site. Effort: 2, Business Value: Average. Assigned to: Iteration #1.
- Login:** Implement users login functionality. 1. User enters login and password 2. System checks access parameters in database and redirects user at the home page. Alternate: 1. If login and password do not exist, show error message. Effort: 2, Business Value: Mandatory. Assigned to: Iteration #1.
- Users List:** Implement users list. 1. User clicks "Users" link 2. System shows users list with following columns: - Name - Email - Address - Phone - Edit (link) - Delete (checkbox) 3. If User selects checkboxes and pushes Delete button, correspondence users removed from database. Effort: 3, Business Value: Mandatory. Assigned to: Iteration #1.

**Iterations' Plan section:** This section shows the plan for Iteration #1 (Current) starting on 09-Nov. It lists tasks and their status:

- Investigate existing solutions: 2 units, 9 of 12 available. Status: Done.
- Configure Database: 2 units, 2 of 24 available. Status: Done.
- Login: 2 units, 2 of 24 available. Status: Done.
- Users List: 3 units, 3 of 24 available. Status: Done.

You could assign user stories on iterations in User Stories List section. Just select required iteration in drop-down list for each user story and push **Assign** button.

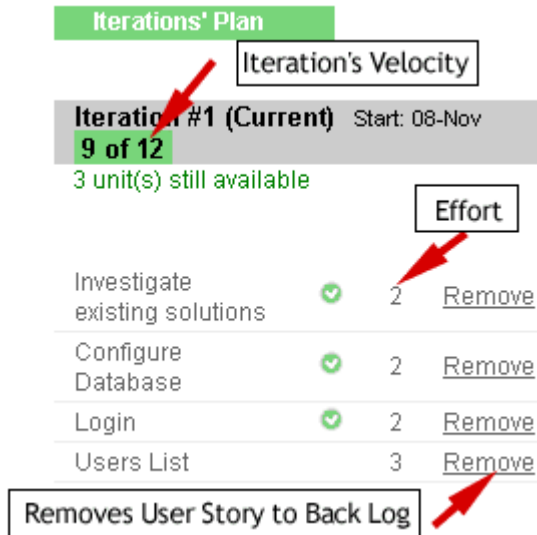


This detailed view shows the 'Assign on' dropdown menu for two user stories. The first story, 'Investigate existing solutions', has a dropdown menu with 'Iteration #1' selected. A red arrow points to the 'Assign on team member' button. The second story, 'Configure Database', has a dropdown menu with 'Iteration #1' selected. A red arrow points to the 'Assign on iteration' button.

Also on this screen you can assign user stories on team members. Right after assignment, user stories will appear in corresponding ToDo lists. For example, you assign "Implement Login feature" user story on John. When John login into the system, he will see "Implement Login feature" in his ToDo list.

There is Iterations' Plan on the right side of the screen. Usually it shows three closest iterations (previous, current and next).

For example, the current iteration is Iteration #1 and you've assigned two new user stories on Iteration #1. These user stories will be removed from Back Log and appear in Iterations' Plan



**Iterations' Plan**

**Iteration's Velocity**

**Iteration #1 (Current)** Start: 08-Nov

**9 of 12**

3 unit(s) still available

**Effort**

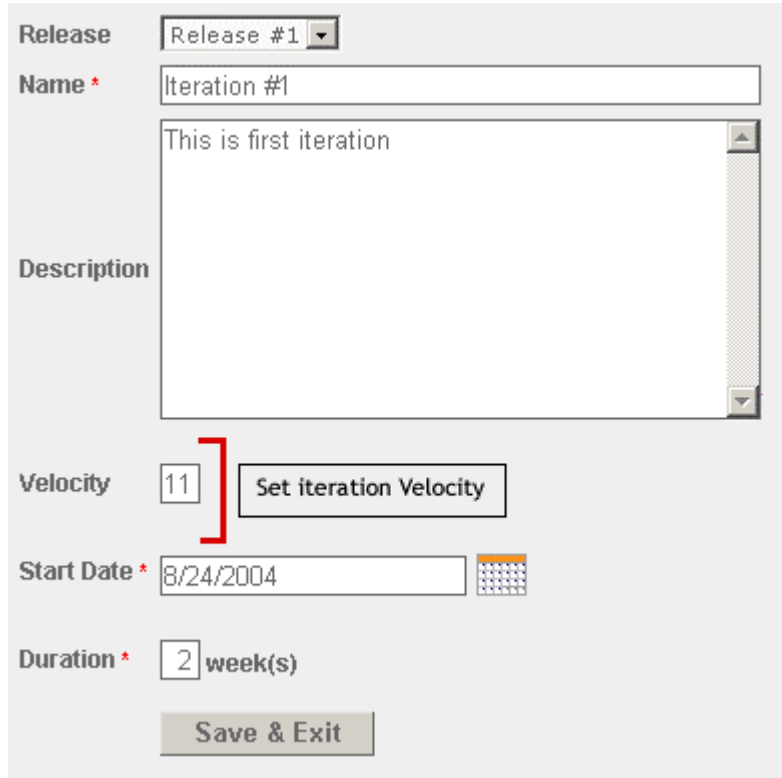
Investigate existing solutions	✓	2	<a href="#">Remove</a>
Configure Database	✓	2	<a href="#">Remove</a>
Login	✓	2	<a href="#">Remove</a>
Users List		3	<a href="#">Remove</a>

**Removes User Story to Back Log**

You can remove user stories from iteration to Back Log. Iteration's Velocity bar indicates how many effort units could be added to this iteration. On the picture above, it is allowed to add, for example, one user story with effort = 3.

## Set Iteration Velocity

When the first iteration will be completed, it is time to set second iteration's velocity. Choose the project and click **Iterations** link. Iterations list will appear. Find required iteration and click **Edit** link. New window with iteration's parameters will pop-up.




Release

Name \*

Description

Velocity

Start Date \*  

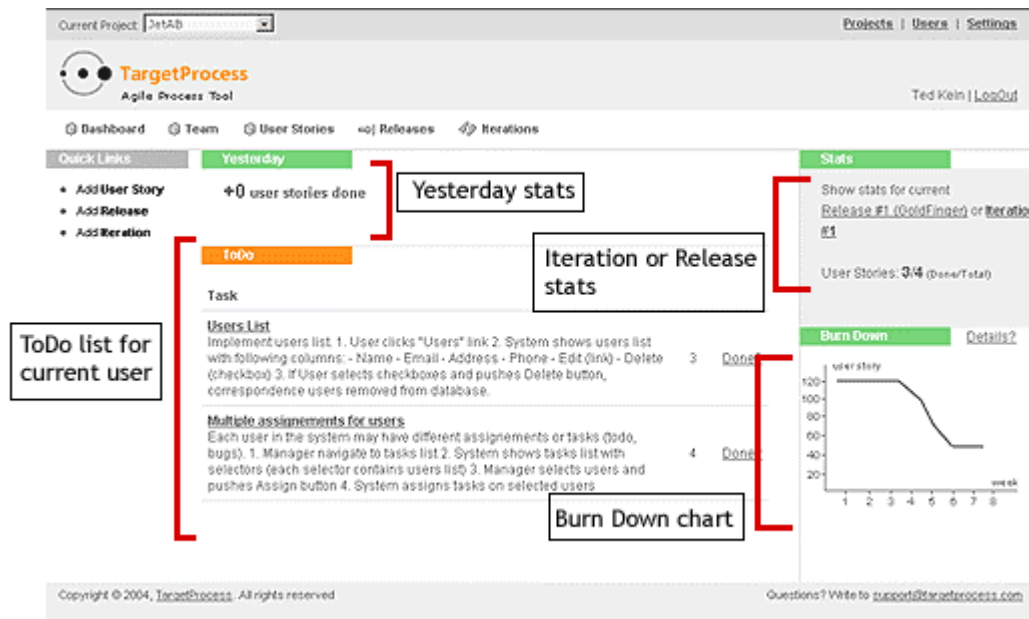
Duration \*  week(s)

There is **Velocity** field in a pop-up window. Enter required velocity value and push **Save & Exit** button.

# Project Tracking

Project Dashboard is the main feature for project tracking. It consists of the several areas:

- Yesterday's stats
- Current Release or Iteration stats
- Burn Down chart
- ToDo list



## Burn Down Chart

The most important project progress indicator is a Burn Down chart. It shows how User Stories were implemented during release. Project manager could compare team performance among iterations and get general information about project state. Let's check the following data

Iteration	User Stories done
#3	8
#4	10
#5	6
#6	4

It is clear that something has been going wrong since iteration #5. And Burn Down chart will show exactly that. It is up to project manager to identify problems, the chart just indicates that there are some troubles to be addressed and resolved.

## Stats

Yesterday's stats show yesterday progress. It is quite handy to know how many user stories were completed yesterday. Moreover, this is a motivation factor.

Current release or iteration stats help to predict the nearest future. For example, 8 user stories were planned on current iteration. But in the middle of the iteration only 2 of them were finished. Of course, maybe the team will be able to finish the other 6 user stories, but it is good chance to double-check real situation and ensure that the iteration is on track.

If you have any questions about TargetProcess:Planning system, just contact us

[info@targetprocess.com](mailto:info@targetprocess.com)

<http://www.targetprocess.com>

## Appendix A. Resources

### **Planning Extreme Programming**

*by Kent Beck, Martin Fowler*

<http://www.amazon.com/exec/obidos/tg/detail/-/0201710919/002-5598678-3693648>

### **The Rational Unified Process: An Introduction**

*Philippe Kruchten*

<http://www.amazon.com/exec/obidos/tg/detail/-/0201707101/103-5739680-9585429>

### **Extreme Programming Applied: Playing to Win**

*by Ken Auer, Roy Miller*

<http://www.amazon.com/exec/obidos/tg/detail/-/0201616408/103-5739680-9585429>

### **Agile Software Development**

*by Alistair Cockburn*

[http://www.amazon.com/exec/obidos/tg/detail/-/0201699699/qid=1088001735/sr=1-3/ref=sr\\_1\\_3/103-5739680-9585429](http://www.amazon.com/exec/obidos/tg/detail/-/0201699699/qid=1088001735/sr=1-3/ref=sr_1_3/103-5739680-9585429)