

CODING DevOps Project Management



Copyright Notice

©2013–2024 Tencent Cloud. All rights reserved.

The complete copyright of this document, including all text, data, images, and other content, is solely and exclusively owned by Tencent Cloud Computing (Beijing) Co., Ltd. ("Tencent Cloud"); Without prior explicit written permission from Tencent Cloud, no entity shall reproduce, modify, use, plagiarize, or disseminate the entire or partial content of this document in any form. Such actions constitute an infringement of Tencent Cloud's copyright, and Tencent Cloud will take legal measures to pursue liability under the applicable laws.

Trademark Notice



This trademark and its related service trademarks are owned by Tencent Cloud Computing (Beijing) Co., Ltd. and its affiliated companies ("Tencent Cloud"). The trademarks of third parties mentioned in this document are the property of their respective owners under the applicable laws. Without the written permission of Tencent Cloud and the relevant trademark rights owners, no entity shall use, reproduce, modify, disseminate, or copy the trademarks as mentioned above in any way. Any such actions will constitute an infringement of Tencent Cloud's and the relevant owners' trademark rights, and Tencent Cloud will take legal measures to pursue liability under the applicable laws.

Service Notice

This document provides an overview of the as-is details of Tencent Cloud's products and services in their entirety or part. The descriptions of certain products and services may be subject to adjustments from time to time.

The commercial contract concluded by you and Tencent Cloud will provide the specific types of Tencent Cloud products and services you purchase and the service standards. Unless otherwise agreed upon by both parties, Tencent Cloud does not make any explicit or implied commitments or warranties regarding the content of this document.

Contact Us

We are committed to providing personalized pre-sales consultation and technical after-sale support. Don't hesitate to contact us at 4009100100 or 95716 for any inquiries or concerns.

Contents

Project Management

- Select Suitable Collaboration Mode

- Quick Start (Scrum Agile Project Mode)

- Quick Start (Classic Project Mode)

Issue Management

- Import and Export Issues

- Copy Item or Link

- Filter Issues

- Batch Update Item Attributes

- Template Description

Configuration Plan Management

- Overview

- Managing configuration schemes

- Application Configuration Plan

- Custom Issue Types

- Custom Issue Fields

- Custom workflow

Project Members and Permission Management

Project Settings

Project Management

Select Suitable Collaboration Mode

Last updated: 2024-09-05 16:19:22

This article will provide you with a detailed guide on choosing the right collaboration mode in CODING.

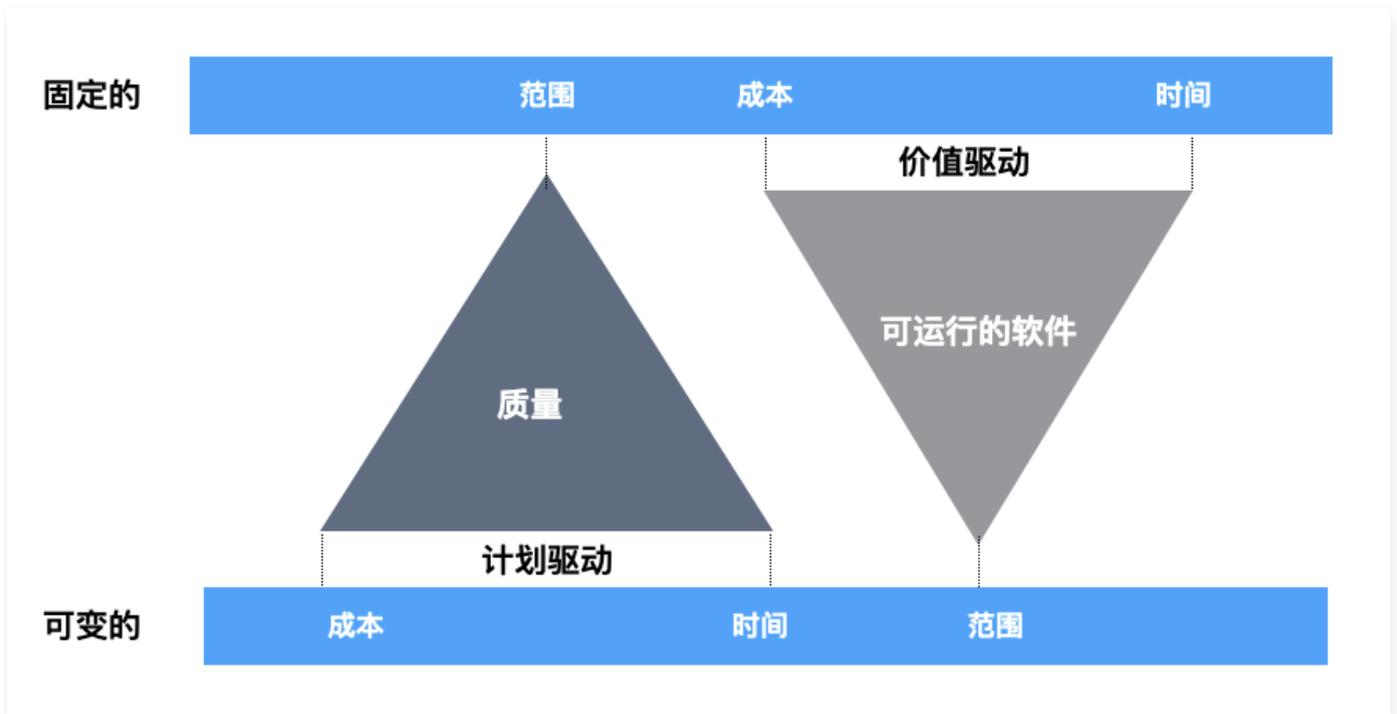
Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

CODING supports both Scrum Agile Project Management and Traditional Project Management. How should development teams choose between **Classic Project Management**, which is based on traditional project management, or **Scrum Agile Project Management** based on Scrum, according to their needs and management preferences? This article will provide selection references from the perspectives of conceptual differences, common development models, and practical applications.

Value Concept

In terms of concept, the project management iron triangle encompasses scope, cost, and time. **Traditional Project Management is characterized by being plan-driven**; personnel and time are allocated only after the scope of requirements is fixed, and risks are actively tracked and controlled during project advancement. **Agile projects are value-driven**; in Agile Project Management, costs and time are fixed first, and requirements are frequently refined during the delivery period, prioritizing the delivery of high-value requirements within a fixed timebox.



Behind Traditional Project Management and Agile Project Management are also the conceptual differences between predefined processes and experimental processes. Predefined processes focus more on planning and controlling changes, while experimental processes embrace changes, adjusting course based on quick practical feedback. PMBOOK divides the project development lifecycle into predictive (plan-driven), adaptive (agile), iterative, incremental, or hybrid types.

预测型	迭代型	增量型	敏捷型
需求在开发前预先确定	需求在交付期间定期细化	需求在交付期间频繁细化	
针对最终可交付成果制定交付计划, 然后在项目终了时一次交付最终产品	分次交付整体产品的各种子集	频繁交付对客户有价值的各种子集(隶属于整体产品)	
尽量限制变更	定期把变更融入项目	在交付期间实时把变更融入项目	
关键相关方在特定里程碑时点参与	关键相关方定期参与	关键相关方持续参与	
通过对基本可知情况编制详细计划而控制风险和成本	通过用新信息逐渐细化计划而控制风险和成本	随需求和制约因素的显现而控制风险和成本	

A project may encompass one or more of these phases, and different teams in an enterprise may use one or multiple project management modes. For example, core systems of an enterprise, outsourced projects, and high-delivery projects often adopt traditional project management. These systems either have fewer requirement changes or require detailed

project plans and business commitments. For internet products, where requirements and users are often unstable, adopting an agile mode can yield faster market feedback, making detailed long-term planning impractical and unsuitable.

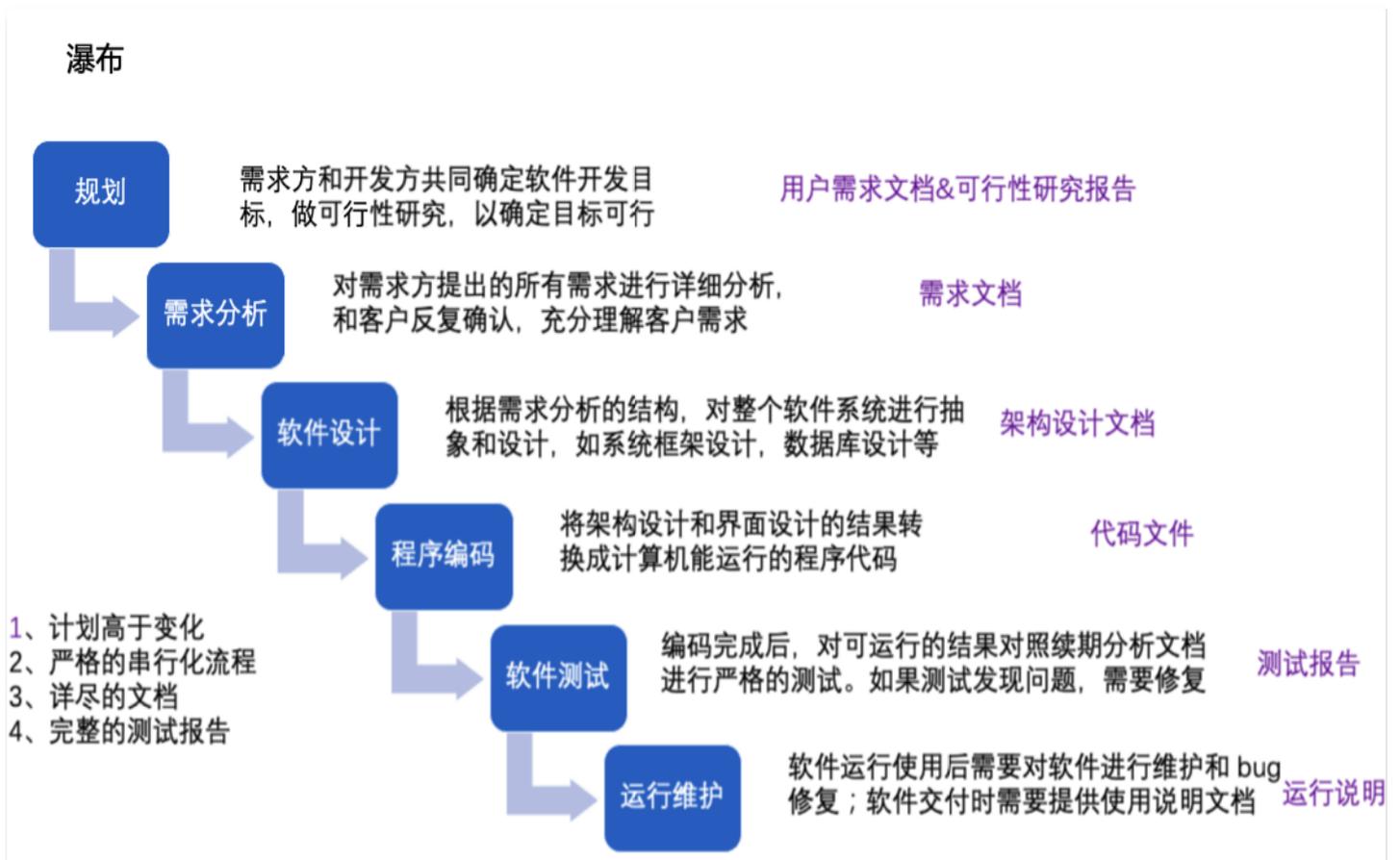
Development Model

After understanding the conceptual differences, let's look at the common development models. The most common model in Traditional Project Management is the Waterfall Model, and the most common model in Agile Project Management is the Scrum framework.

Traditional Project Management: Waterfall Model

The Waterfall Model is generally considered to have been proposed by Winston Royce in 1970. Its core idea is to simplify problems by procedures and separate the realization and design of features to facilitate collaboration. The Waterfall Model divides the software lifecycle into six basic activities: planning, requirements analysis, software design, program coding, software testing, and operation and maintenance. These activities follow a fixed sequence from top to bottom, akin to the cascading descent of a waterfall.

Additionally, the Waterfall Model emphasizes documentation, as the output of one phase is the input for the next. Documentation serves as the only information linking these phases. From the Waterfall Model's perspective, insufficient design and recording can result in knowledge loss if team members leave before project completion, making recovery difficult. Honest documentation should allow new or even entirely new teams to take over the project by reading it.



Interestingly, Royce originally proposed this model not to solely endorse the Waterfall approach but to highlight its possible high risk when dealing with projects with frequently changing requirements. However, the Waterfall Model inadvertently offers a structured, easy-to-understand linear process with identifiable milestones, which is why it's often used as an introductory example in software engineering textbooks and courses. It remains a significant development model in software development companies, suitable for projects with fixed requirements and scopes, stable products, and easily understood technologies.

Royce's true proposition was the improved Waterfall Model, which prioritizes prototyping alongside the traditional Waterfall Model. This prototyping is akin to an iteration in Agile, used to validate a project's feasibility and thereby reduce risks. Next, let's explore how the concept of iteration is profoundly utilized in Scrum.

Agile Project Management: Scrum Framework

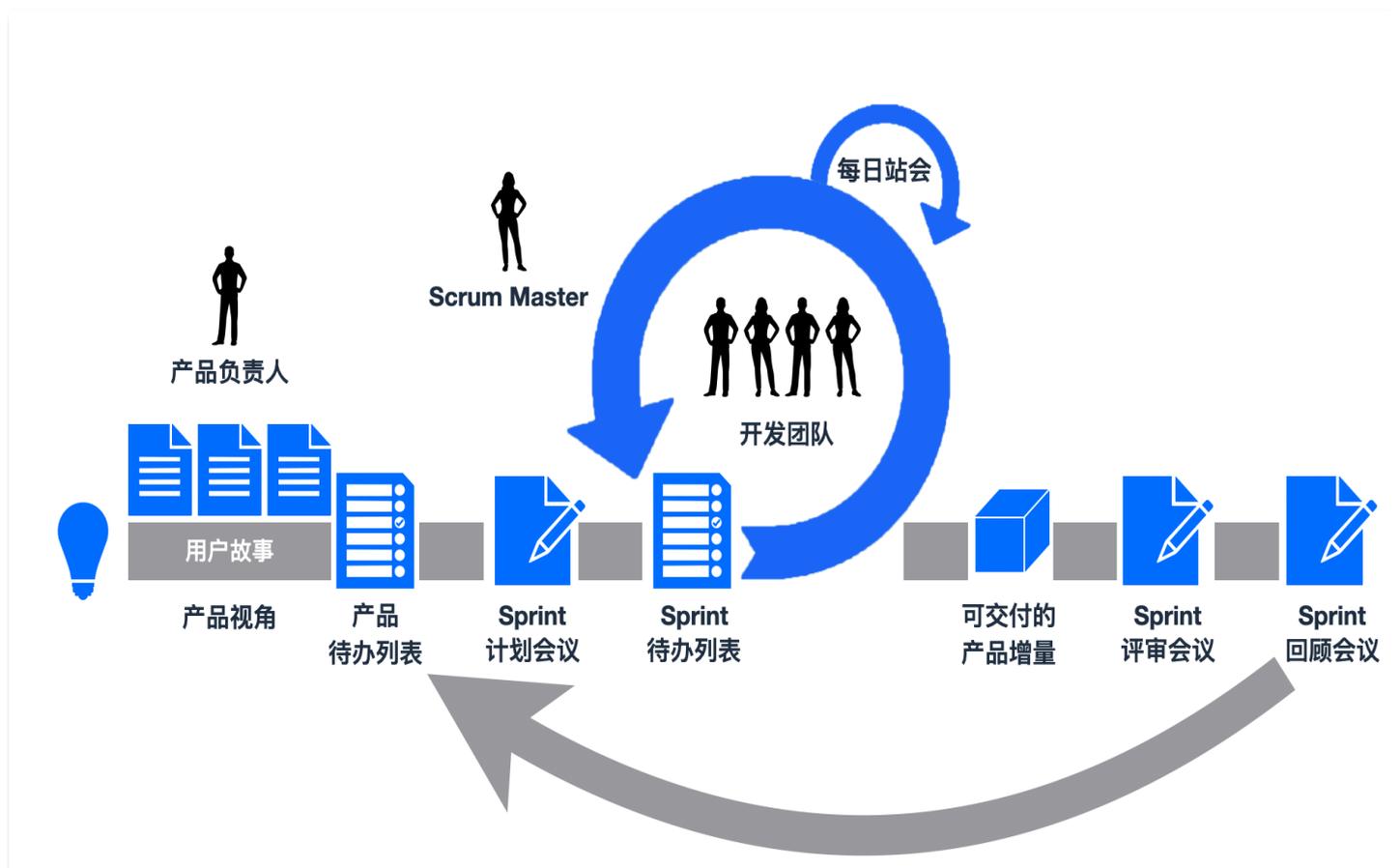
Scrum is a framework for addressing complex and changing issues. Based on empiricism and lean thinking, it adopts an iterative and incremental approach to optimize forecasting for the future and control risks, helping teams and organizations create value.

In 1986, Hirotaka Takeuchi and Ikujiro Nonaka introduced a novel holistic approach, which they likened to rugby: the process is completed by a cross-functional team at different stages,

with the team “moving forward as a unit, passing the ball back and forth.” This approach can enhance the speed and flexibility of commercial new product development.

After being cited and evolving over the turn of the millennium, the concept of Scrum was formally introduced by Jeff Sutherland and Ken Schwaber in a paper at OOPSLA '95 in Austin. In the following years, they combined principles, experiences, and industry practices to shape what we now know as Scrum. They released the Scrum Guide in 2020, which interested readers can refer to for more details.

Sprints are the heart of Scrum, where ideas are transformed into value. They are time-boxed events lasting 1 to 4 weeks. Upon the conclusion of one Sprint, the next one begins immediately. All activities needed to achieve the product goal occur within the Sprint, including Sprint Planning, Daily Standups, Sprint Review, and Sprint Retrospective.



The vitality of Scrum lies in its 'sprint' philosophy in the face of a volatile market. Product R&D teams attain rapid feedback on the product by 'getting their hands dirty,' which allows for product improvement. To maintain a tight iteration rhythm, the Scrum framework demands high 'transparency' in the project management process: transparency makes inspection possible, and frequent 'inspection' can quickly identify existing problems in the project; inspection enables adaptation, allowing for quick adjustments based on identified problems. Scrum practices enable organizations to adapt to change.

Practical Application

We do not regard traditional project management and agile project management as mutually exclusive. Each has its unique characteristics and applicable scenarios, and both have digitalization needs. CODING Project Collaboration offers **classic project management based on traditional models** and **Scrum agile project management based on Scrum**. Your team can practice various R&D models with CODING, including Waterfall development, incremental development, and the Scrum framework. We aim to provide diversified project management solutions to more organizations and teams, rather than a one-size-fits-all approach. The diagram below compares the workflows of Scrum agile project management and classic project management in CODING Project Collaboration:

	敏捷项目协同	经典项目管理
workflow	<ol style="list-style-type: none"> 1. 维护 Backlog, 过大的需求可创建为史诗 2. 评估事项 3. 规划迭代 4. 进行迭代: 认领需求、完成需求 5. 迭代完成后总结 6. 用户反馈录入 Backlog 	<ol style="list-style-type: none"> 1. 调研需求, 编写需求文档 2. 创建项目计划, 在计划内创建迭代 3. 将需求加入迭代 4. 需求分解为任务、界定依赖关系、评估开始和结束时间 5. 分配任务, 预估工时 6. 进行迭代: 登记工时、填写进度、跟踪进度、提出并修复缺陷 7. 完成迭代并交付
驱动	迭代驱动 (资源/时间固定) Sprint	计划驱动 (需求固定) Iteration
评估	故事点	工时
成员能动性	认领需求	分配任务
迭代并行	通常同时进行一个	可并行多个

Classic Project Management

Coding Classic Project Management aims to address challenges in traditional project management:

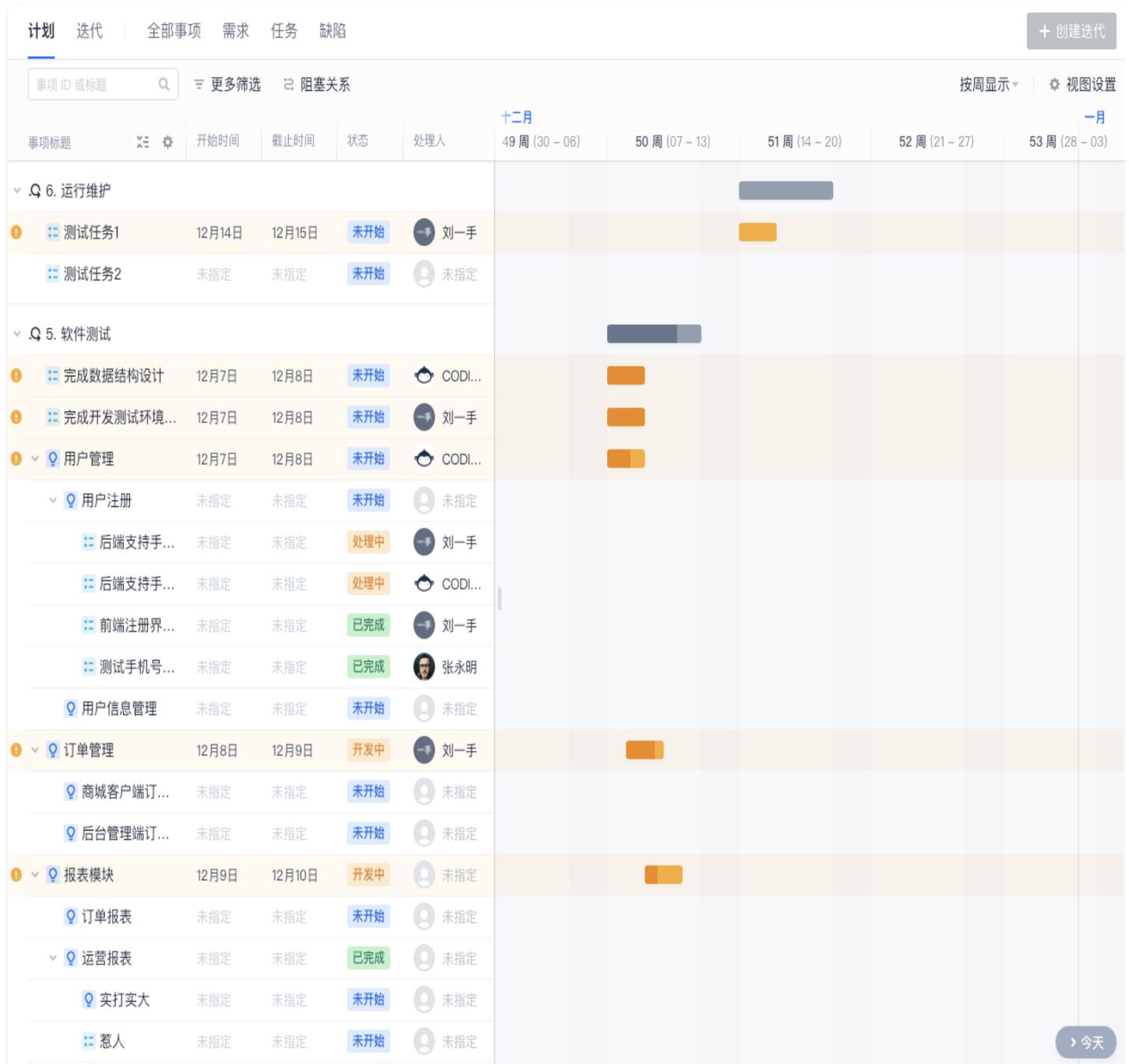
Unified Collaboration, integrates phase and function information on the same platform.

Global View, planning page summarizes project progress, grasping the status of multiple iterations in real-time.

Project Progress , planning and iteration overview pages track progress, making the process transparent and the pace controllable.

Resource Management , planning page allows viewing member tasks anytime, assigning, and coordinating personnel.

Quality Control , tracks test progress and defect fixing through test management and defect management.



In addition to the above capabilities, with CODING's file cloud drive and Wiki knowledge base, teams can easily manage documents in traditional project management processes.

Documents can be accessed and shared via the web at any time, and version history can be traced back at any moment. You can also reference features in requirements and tasks to quickly locate related documents, saving time and effort.

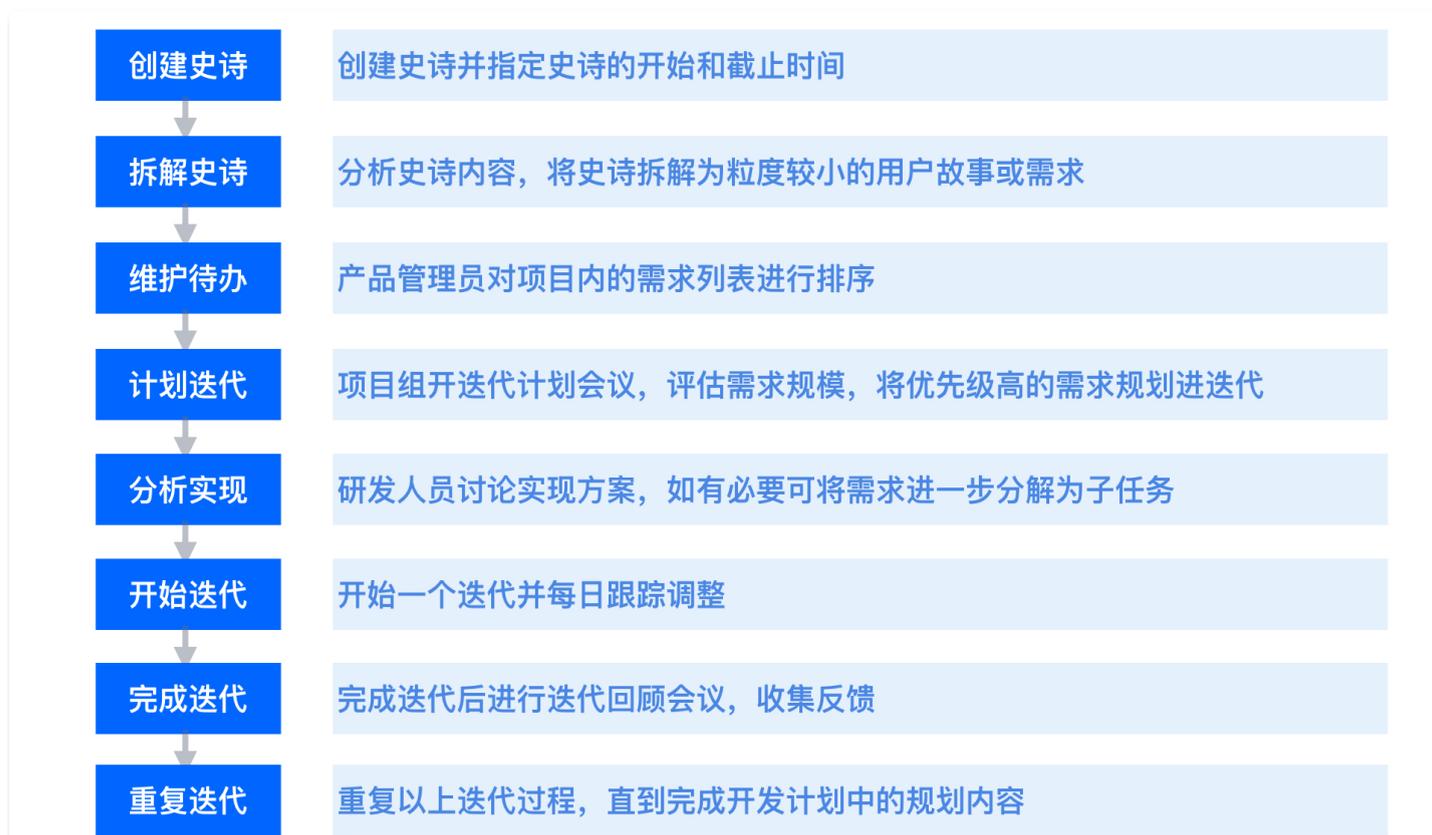
Go to [Detailed Explanation of Classic Project Management Mode](#) , where your team can practice various collaboration methods in this mode.

Scrum Agile Project Management

CODING's Scrum agile project management is suitable for iteration-driven teams. These teams expose potential issues through short-cycle quick trials and continuously inspect and adjust to improve their products, teams, and working environments, thereby efficiently and creatively delivering high-value products.

CODING's Agile Development Collaboration offers task collaboration tools centered around iterations and items (iteration, epic, user story, requirement, defect, task, subtask). When facing a large task, you can write it as an epic and then break it down into detailed requirements, tasks, and defect management. The key to agile collaboration is to quickly release a minimal effective version despite imperfections; each iteration includes planning, design, coding, testing, and evaluation steps. By frequently releasing, tracking feedback from the previous iteration, and adding new features, you gradually approach a more refined product form in a positive workflow.

Go to [Detailed Explanation of Scrum Agile Project Management Mode](#) to help you and your team quickly get started with agile development, and become a good tool for enterprises practicing agile development through standardized processes and complete information statistics.



Select Collaboration Mode

After gaining a basic understanding from concept, model to application practice, at the end of the document, we provide a simplified evaluation for agile and classic project management mode matching recommendations, which you can estimate based on your team's current situation.

Evaluation Items	Description
Requirement Stability	Stable Requirements 0 points ——— Unstable Requirements 10 points
Business and IT Interaction	High business and IT interaction difficulty 0 points ——— Low business and IT interaction difficulty 10 points
Project Impact	High relevance to key systems 0 points ——— Low relevance to key systems 10 points
System Modularity Degree	Low system modularity 0 points ——— High system modularity 10 points

Environment Development Degree

Low environment openness 0 points
———— High environment openness 10 points

Detection Results

Score 0–20, we highly recommend using Classic Mode.

Score 30–50, we highly recommend using Agile Mode.

This article references:

- Jim Highsmith. "Agile Project Management"
- Project Management Institute. A Guide to the Project Management Body of Knowledge (PMBOK Guide) (6th Edition)
- Robert C. Martin, translated by Shen Jian, He Qiang, and Luo Tao, <The Tao of Clean Agile>
- [2020 Scrum Guide](#)
- [Winston W. Royce](#)
- [Scrum Entry](#)

Quick Start (Scrum Agile Project Mode)

Last updated: 2024-09-05 16:19:39

This document describes the Scrum agile project management mode in CODING Project Collaboration.

Open Project

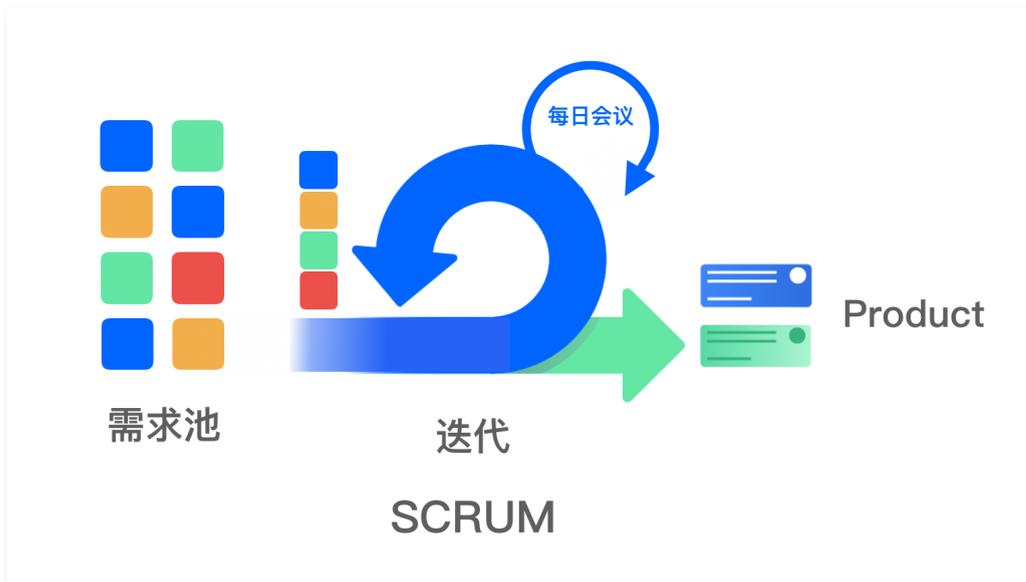
1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

Agile development involves principles and practices across the entire software engineering process. At its core are **iterations and the incremental software development method**. Developers quickly release a runnable but imperfect version to the market. Based on user feedback, further iterations improve the product, adding one or more user-perceivable complete features, thereby approaching the final form of the product.

Agile development is a **combination of organizational culture, processes, and tools**. In agile development, it is essential to emphasize the equal importance of "tools, processes, and organizational culture." Without tool support, agile development cannot achieve "high speed"; without the support of organizational culture, agile development will fail to unite team members in achieving common goals.

CODING embraces the most advanced agile development theories, helping teams quickly get started with agile development and becoming a useful tool for enterprises to practice agile development through standardized processes and comprehensive information statistics.



Scrum Agile Project Management Mode

The Scrum agile project management mode in CODING is suited to iteration-driven teams. Such teams expose potential issues faced through quick tests over short durations, and then continuously inspect and adapt their products, teams, and working environments, so as to efficiently and creatively deliver products with maximum value.

The demand for efficiency has extended the audience of agile collaboration concepts beyond IT personnel, diversifying its reach. For instance, operations teams use CODING project collaboration for event planning, and product managers coordinate development projects with these concepts. The Scrum agile project management mode provides the possibility for various teams to practice Scrum.

Further reading: [An In-Depth Interpretation of the Latest Version of The Scrum Guide](#).

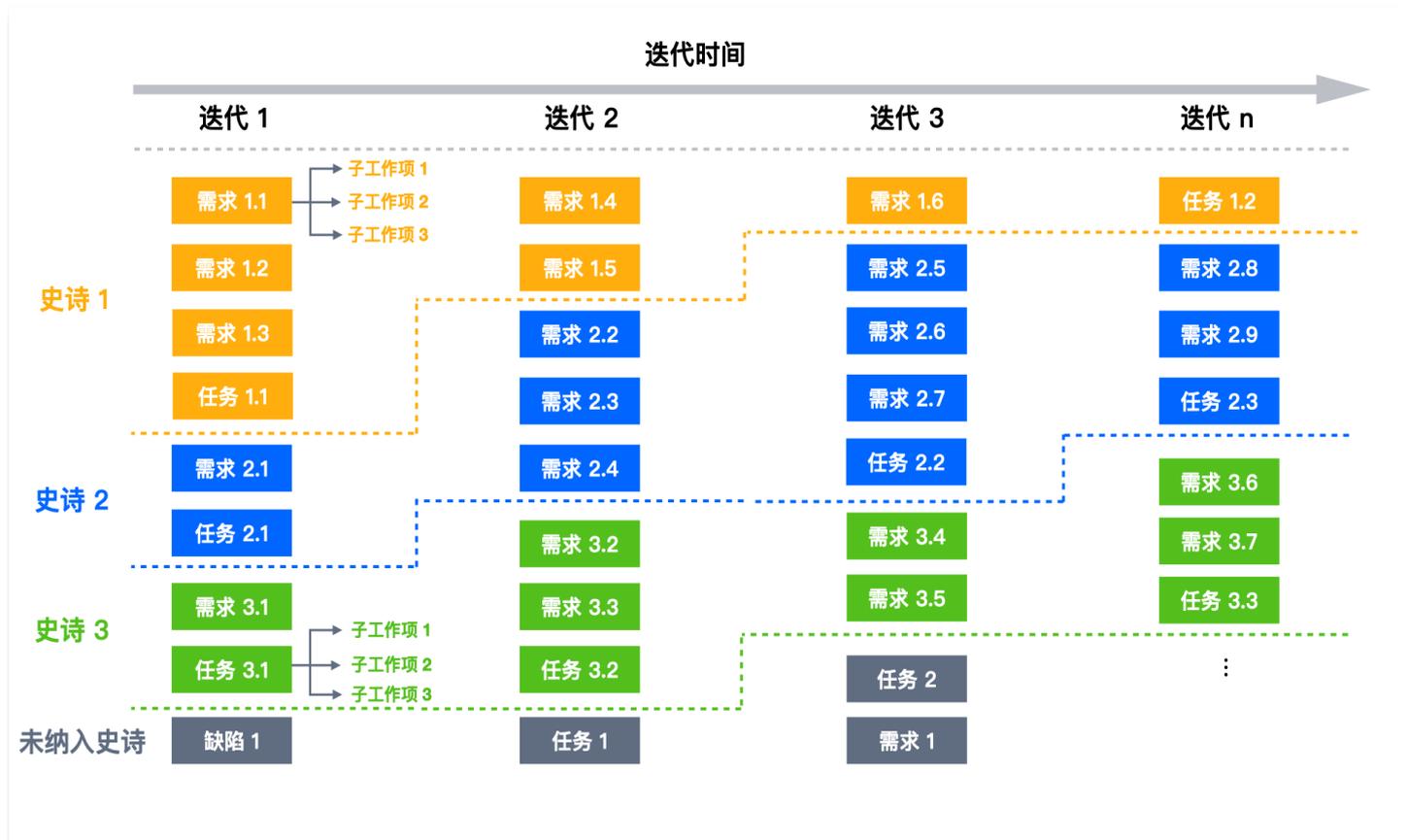
Features

The Scrum agile project management mode offers task collaboration tools centered around iterations and issues (epics, user stories, requirements, bugs, tasks, sub-tasks). When faced with a large task, it can be written as an epic and then broken down into detailed aspects such as requirements, tasks, and bug management. The key to agile collaboration is quickly releasing the most simplistic yet effective version. Each iteration includes five steps: planning, design, coding, testing, and review. By continuously improving the product and adding new features in this positive workflow, and through frequent releases and tracking feedback from the previous iteration, a more complete form of the product is ultimately achieved.

Hierarchical Relationships Between Workflow Issues

Under the CODING Scrum agile project management mode, the hierarchy among workflows (iterations, epics, user stories, requirements, bugs, tasks, sub-tasks) can be roughly outlined

as follows:



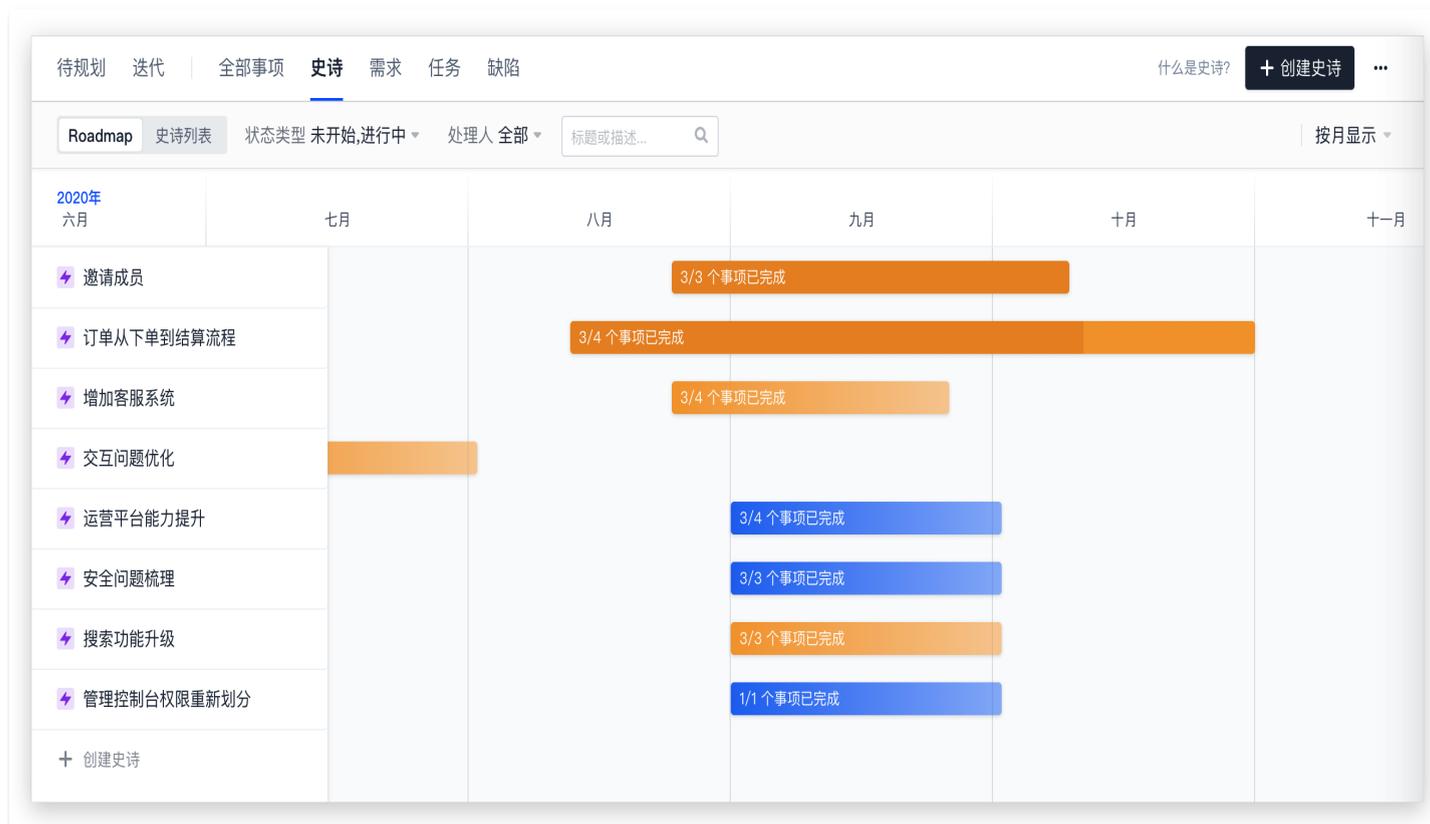
Iterations

Iterations are the horizontal axis of agile development, signifying a time sprint. It indicates a short, fixed period during which the team completes a certain amount of work. The lifecycle of an iteration follows the sequence of not started, in progress, and completed phases. In the iterative development method, the entire development work is organized into a series of small, fixed-length projects (e.g., 2 weeks), known as a series of iterations.

引用ID	迭代名称	开始时间	结束时间	阶段	进度	负责人
#671	Q4 - Sprint2 [移动端小程序上线]	2020/10/20	2020/11/15	未开始	0%	潘潘
#670	Q4 - Sprint1 [购物体验优化]	2020/10/01	2020/10/20	未开始	0%	刘周
#187	Q3 - Sprint3 [客服系统对接]	2020/08/26	2020/09/15	进行中	80%	Peny
#73	Q3 - Sprint1 [商品点评]	2020/08/14	2020/09/12	进行中	60%	阿蓝
#72	Q3 - Sprint2 [商品详情页]	2020/09/08	2020/09/08	进行中	75%	潘潘
#71	Q2 - Sprint5 [商品管理列表]	2020/08/14	2020/08/14	进行中	100%	潘潘
#70	Q2 - Sprint4 [第三方支付接口]	2020/07/23	2020/07/23	进行中	66.67%	阿蓝
#3	Q2 - Sprint3 [账户优化]	2020/09/08	2020/09/08	进行中	80%	潘潘

Epics

Epics are the vertical axis of agile development. An epic divides large-scale work into detailed issues and generally takes several iterations to complete. The requirements and tasks under an agile epic can be flexibly adjusted based on the customer feedback and the team's development progress. An epic is broken down into requirements and tasks of smaller granularity, which are then added in iterations for completion.



User stories

The user story is the smallest unit of work in the agile framework. It describes the value brought by software to users and is an important measure for agile requirements. A good user story includes the following three elements:

1. Role: Who will use this feature.
2. Activity: What kind of feature needs to be completed.
3. Business value: Why is this feature needed? What kind of value will it bring?

创建用户故事 1人关注中

标题 *

店铺独立访客 + 商品浏览量统计功能

用户故事描述

编辑 预览 H B I @ # 模板

作为商户，需要统计每天有多少独立访客访问了店铺以及各个商品的浏览量，以便于及时调整上架商品及营销策略。

规则描述
1.规则描述 1
2.规则描述 2

验收标准
1.
2.

附件 | 上传附件 外部引入

尚未添加附件

| 继续创建下一个

处理人
未指定

所属迭代
未规划进迭代

故事点
-

优先级 *
中

截止日期
未指定

标签
+

Requirements

Requirements refer to the software features needed by users to solve a certain problem or achieve a certain goal. Requirements help team members track more detailed problems. Generally, a requirement can be completed in one iteration. An iteration can accommodate several requirements.

ID	标题	优先级	状态	处理人	创建时间
#87	客服入口规划及页面设计	3/3 增加客服系统 紧急	开发中	阿蓝	2020/07/23
#651	开发 OpenApi 1.0 版本, 供外部开发者使用	11月14日截止 中	未开始	Peny	2020/09/07
#186	后端获取第三方客服系统接口信息	0/2 9月9日截止 中	已完成	阿蓝	2020/08/26
#655	获取 API 文档	中	处理中	阿蓝	2020/09/08
#656	调试接口信息	中	处理中	阿蓝	2020/09/08
#83	商品点击星标即可到收藏夹	中	测试中	潘潘	2020/07/23
#80	商品详情页支持分享到微信	中	开发中	Peny	2020/07/23
#76	支持商户快捷回复用户评论+支持图片回复能力	1/2 中	已完成	刘周	2020/07/23
#663	后台开发	中	未开始	刘周	2020/09/08
#9	[示例需求]-通过邮箱地址邀请成员加入团队	0/2 邀请成员 7月16日截止 中	已完成	潘潘	2020/07/13
#10	增加批量发送邀请邮件接口	7月13日截止 高	处理中	潘潘	2020/07/13
#11	增加邮件邀请成员弹窗并完成邀请成员交互功能	7月14日截止 中	处理中	潘潘	2020/07/13

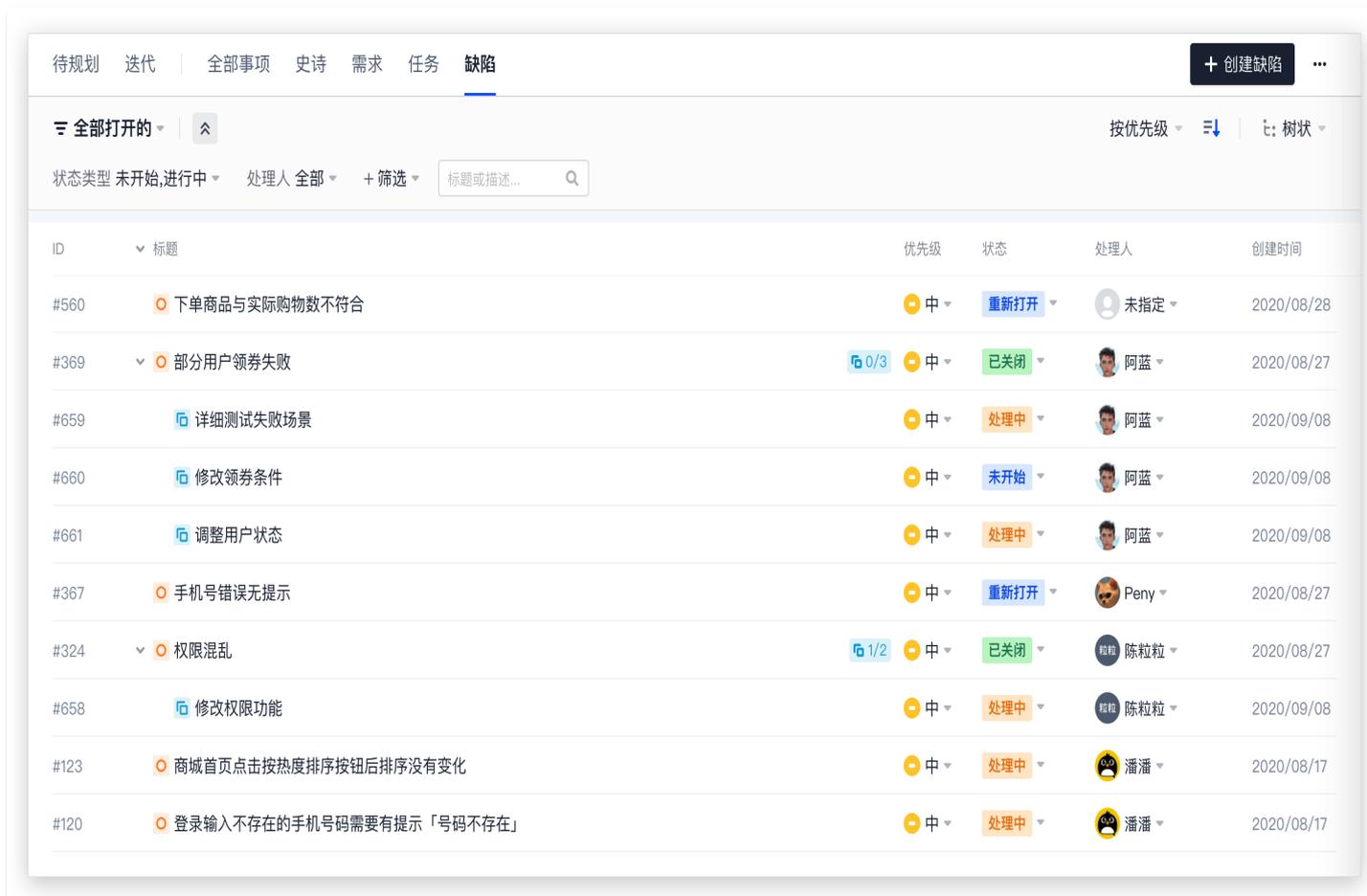
Task

Tasks refer to specific activities carried out to achieve a certain goal. Generally, a task can be completed in one iteration. An iteration can accommodate several tasks. One task can also be associated with or divided into several sub-tasks for flexible task distribution.

ID	标题	优先级	状态	处理人	创建时间
#102	进入购物车后可以查看所有添加至购物车的商品数据, 并且完成结算	高	处理中	潘潘	2020/08/14
#14	增加批量发送邀请邮件接口	高	处理中	刘周	2020/07/13
#667	客服系统设计文档撰写	中	未开始	潘潘	2020/09/08
#664	建立客服系统的持续集成流水线	中	已完成	Peny	2020/09/08
#668	完成测试环境流水线	中	处理中	未指定	2020/09/08
#669	将流水线接入生产环境	中	处理中	未指定	2020/09/08
#168	清理脏数据	中	未开始	未指定	2020/08/25
#164	事故处理机制	中	未开始	未指定	2020/08/25
#118	第三方付款接口按文档规范开发	中	未开始	未指定	2020/08/14

Bug

A bug is a failure to meet an initially defined business requirement. Bugs include any such defect except coding errors.



ID	标题	优先级	状态	处理人	创建时间
#560	下单商品与实际购物数不符合	中	重新打开	未指定	2020/08/28
#369	部分用户领券失败	0/3 中	已关闭	阿蓝	2020/08/27
#659	详细测试失败场景	中	处理中	阿蓝	2020/09/08
#660	修改领券条件	中	未开始	阿蓝	2020/09/08
#661	调整用户状态	中	处理中	阿蓝	2020/09/08
#367	手机号错误无提示	中	重新打开	Peny	2020/08/27
#324	权限混乱	1/2 中	已关闭	陈粒粒	2020/08/27
#658	修改权限功能	中	处理中	陈粒粒	2020/09/08
#123	商城首页点击按热度排序按钮后排序没有变化	中	处理中	潘潘	2020/08/17
#120	登录输入不存在的手机号码需要有提示「号码不存在」	中	处理中	潘潘	2020/08/17

Start Scrum Agile Project Management Mode

In the following section, we will use a common agile development workflow to demonstrate how to use the Scrum agile project management mode in CODING.

Create a project

The first step of agile development is to **confirm the personnel composition of an agile team**. Generally, an agile team consists of three roles:

1. A product owner who makes decisions (Product Owner).
2. An agile coach who provides agile process service to the team (Scrum Master).
3. Developers. After confirming members, create a project in CODING for this agile development, and choose **Scrum Agile Management** when entering **Project Collaboration** for the first time, adding all team members to the project.



Start first iteration

Conduct an iteration planning meeting, where all team members clarify and reach a consensus on the scope of the current iteration. The Scrum Master should add planned user stories, requirements, bugs, and all other issues to the iteration and set the start and end time, and then start the first iteration. As the iteration goes on, team members can adjust their work based on the iteration statistics collected. The biggest concern for the Scrum Master is ensuring that the iteration goes on as planned.



After the iteration starts, team members should conduct daily stand-up meetings to discuss and solve problems found in their work. Daily stand-up meetings must be as simple as possible and not last for more than half an hour. During the meetings, team members describe what they did yesterday, what to do today, and what problems they have found. If any problem occurs, relevant personnel need to work together to solve it.

Requirement management

In the requirement management module, the product owner can maintain and update the product backlog. User stories and requirements can be assigned by the product owner or claimed by developers. When drafting user stories and requirements, the product owner can specify key information such as priority, assignee, and due date. In addition, you can upload files and associate external resources.

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间	更新时间
#34	用户故事	0/1 中	未开始	潘潘	刘一手		2021/12/30 14:58	2022/03/22 14:01	
#35	子工作项	中	未开始	刘一手	刘一手		2021/12/30 14:59	2021/12/30 14:59	
#32	美术需求	中	文案确认	刘一手	刘一手		2021/12/30 14:56	2021/12/30 14:56	
#31	用户故事	中	未开始	文强	刘一手		2021/12/30 14:50	2022/03/22 14:01	
#14	增加客服入口	0/3 新的史诗 中	处理中	文强	Livia		2021/08/26 16:19	2022/03/22 14:01	
#15	客服系统入口规划	中	未开始	未指定	Livia		2021/08/26 16:20	2021/08/26 16:20	

Test management

Generally, each iteration will generate a version that can be released. Before officially deploying the version, testing must take place. Based on the functions, test engineers can write test cases, and then plan and execute test plans in CODING. During the execution of a test plan, some issues may be found, which we usually call bugs or defects. Except for coding errors, any other failure to meet an initially defined business requirement is a bug, which must be considered in the next iteration.

For detailed content, refer to the [Quick Start](#) guide of test management.

Bug Management

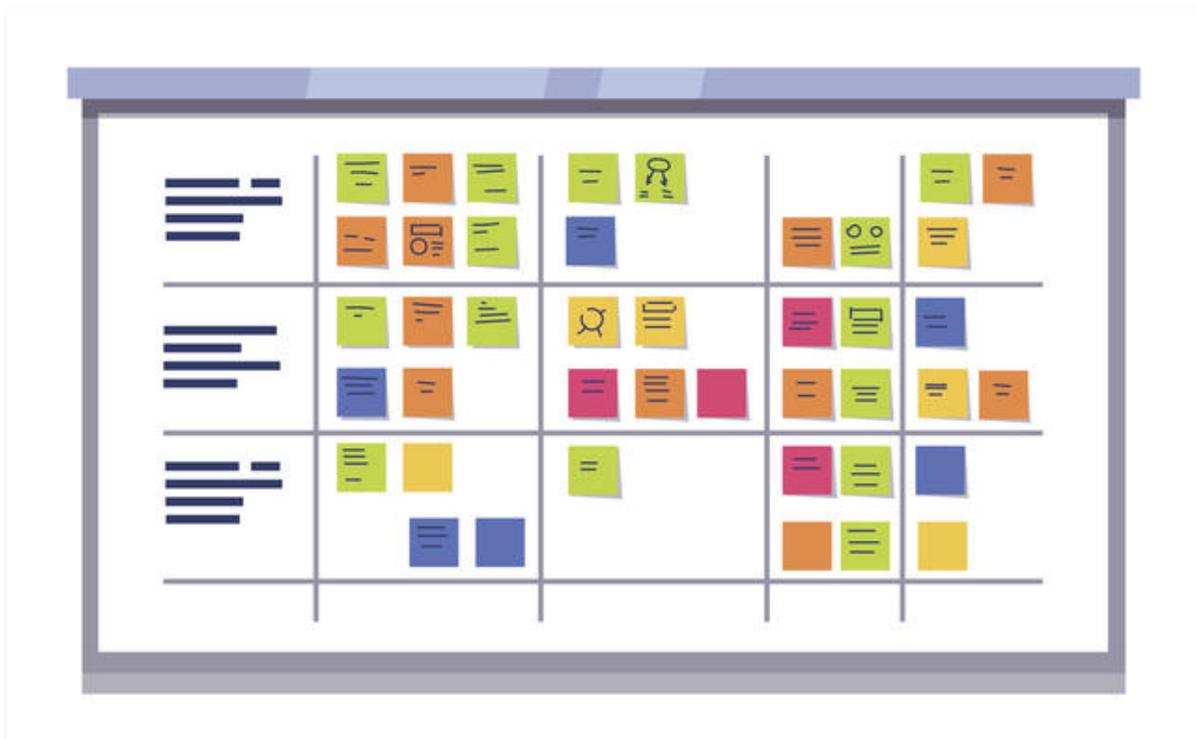
Defects found in the test phase or after a version is officially released can be managed in the bug management module of CODING. They can be prioritized and then added to the next iteration. Depending on the specific defect, urgent bugs must be reported to product personnel and fixed as early as possible. On the contrary, bugs with a low priority can be fixed in subsequent iterations. In the bug management module, key indicators are comprehensively measured, such as the bug type, priority, module, and time at which a bug was identified. This enables test engineers to learn about the bug fixing progress in real time.

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间	
#777	处理人搜索失败	中	待处理	未指定	刘周		2021/06/22 16:04		
#776	显示空白无提示	中	待处理	未指定	刘周		2021/06/22 16:03		
#711	商户快捷回复用户时, 图片大小超过 25 M上传失败	中	待处理	未指定	刘周		2021/05/18 14:36		
#701	登录输入不存在的手机号未提示	中	待处理	周小萍	刘周		2020/12/23 15:04		
#700	直播栏目首页点击排序按钮没有变化	中	待处理	Livia	刘周		2020/12/23 15:04		

Complete first iteration

Regardless of whether all issues in an iteration have been completed, the iteration comes to an end at the preset end time. Before an iteration is actually completed, the product owner should assess all deliverables, review the issue completion status, and calculate the objective achievement rate. After all issues are reviewed, the Scrum Master can formally finish the iteration by clicking the Complete Iteration button.

At the end, team members should conduct a retrospective meeting to summarize what went well and shortcomings in the current iteration, and list the executable tasks for the next iteration, so as to improve the development efficiency of the entire team.



Start new iteration

A series of short, quick iterations that are closely connected are at the core of agile development. During these iterations, product functions are verified and market feedback is continuously collected to deliver a product of value. In addition to choosing the appropriate processes and tools, organizational support is essential for effective agile practices. As teams may not face the exact same problems, agile practices are actually iterations as well. The problems summarized in every retrospective meeting will become invaluable experience for your team.

Quick Start (Classic Project Mode)

Last updated: 2024-09-05 16:20:00

This document describes the classic project management mode in CODING Project Collaboration.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

Classic project management is a concept relative to Scrum agile project management. It is mainly suited to teams using traditional project management approaches, characterized by a strong plan-driven model. It is centered on requirements, resources, and time. Personnel assignments and scheduling take place after requirements are established. In the course of a project, risks are actively tracked and controlled.

In classic project management mode, CODING recommends the following workflow for you and your team: create requirements, create plans, create iterations, break down requirements, assign tasks, develop code, test business, and launch business. These stages are interconnected. Once the team completes and delivers a version iteration of a feature module, the next version iteration can begin. Multiple iterations of different feature modules can also run simultaneously.



The following example uses a virtual mall, Feiniao Market, to describe how a team can collaborate using classic project management.

Enable classic project management mode

When starting the Project Collaboration feature for the first time, select **Classic Project Management** mode.

配置并开启项目协同

项目协同功能用于管理项目信息，包括需求的创建、任务的分解、状态流转、跟踪进度等。你选择团队使用的项目协同方式并点击应用配置 | [了解如何选择协作模式](#)



Scrum 敏捷管理

管理需求、规划并跟进迭代，适用于定期迭代并交付的团队

应用



经典项目管理

管理开发计划、需求和任务，用于基于时间或基于交付的项目

应用

[有什么功能](#)



应用其他项目配置

应用其他项目的协作模式，包括事项类型的属性和 workflow 配置

选择项目

Create requirement

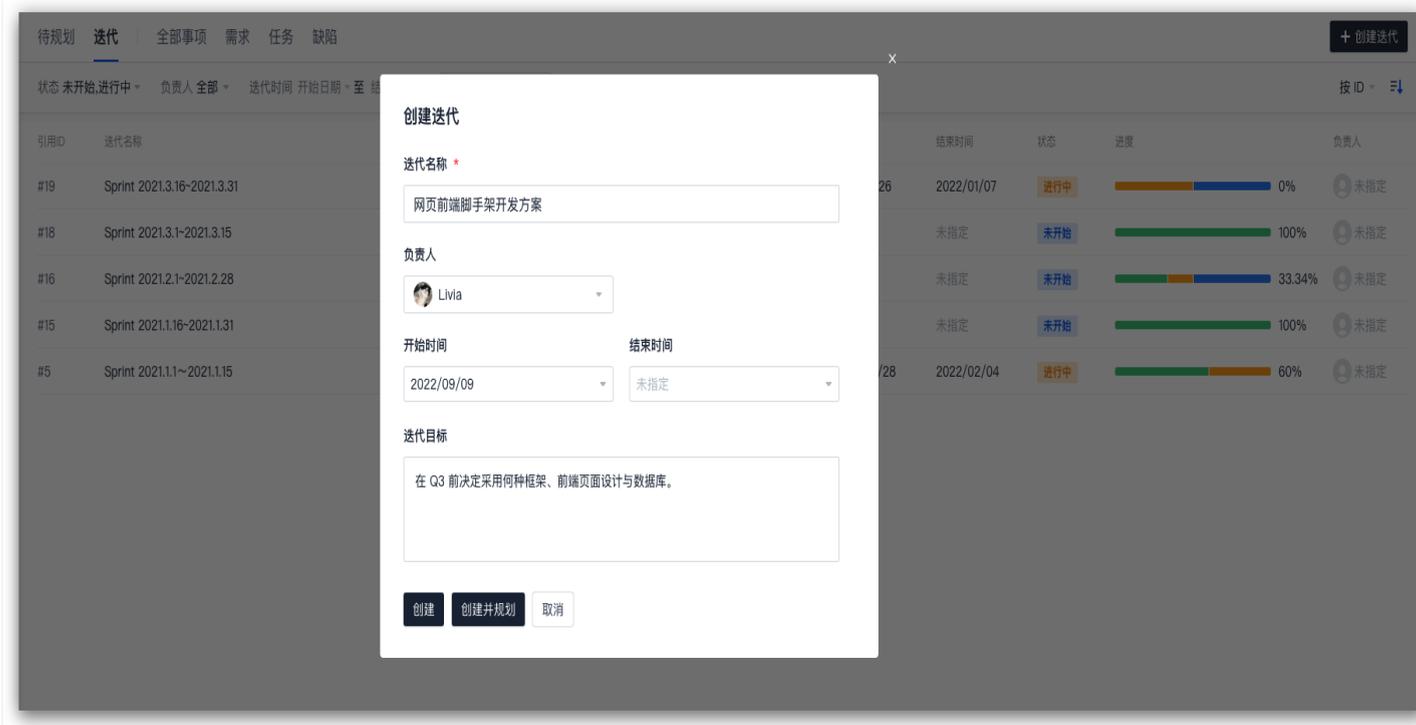
To gain a foothold in the competitive red ocean of e-commerce, research on potential user groups is essential. Usually, product managers create requirement documentation for products according to pain points in the market or user feedback. On the **Requirements** feature page, click the top right **Create Requirements** to create a requirement. Upload attachments or reference external resources (Modao prototype), and seamlessly integrate ideas into team collaboration at any time. The menu on the right side of the requirement details page allows adjustments for requirement priority, type, and due date. You can also specify estimated work hours and project progress as needed.

The screenshot displays the '需求' (Requirements) section of the CODING DevOps platform. A modal window is open for creating a new requirement titled '为商城设计一个醒目的 Logo' (Design a prominent logo for the mall). The form includes fields for '处理人' (Assignee: Livia), '所属迭代' (Iteration: 未规划进迭代), '故事点' (Story Points), '优先级' (Priority: 中), '需求类型' (Requirement Type), '截止日期' (Deadline: 未指定), and '标签' (Tags). The '附件' (Attachments) section shows 'CoDesign 设计稿' and '墨刀原型' as available files. The background shows a list of requirements with columns for ID, Title, Status, Priority, Assignee, Iteration, and Dates.

ID	标题	状态	优先级	处理人	所属迭代	创建时间	更新时间
#45	顶顶顶顶	未开始	中	刘一手	Sprint 2021.2.1-20...	2022/04/21 10:31	2022/04/21 10:31
#42	的点点多多多	进行中	中	刘一手	Sprint 2021.2.1-20...	2022/04/21 10:17	2022/08/29 10:36
#40	111	未开始	中	刘一手	Sprint 2021.2.1-20...	2022/04/21 10:13	2022/04/21 10:13
#39	22222222	未开始	中	刘一手	Sprint 2021.2.1-20...	2022/04/21 10:13	2022/04/21 10:13
#38	迭代	未开始	中	刘一手	Sprint 2021.2.1-20...	2022/04/20 18:36	2022/08/29 10:36
#34	44444	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 16:04	2022/08/17 15:43
#33	5555	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 16:04	2022/08/17 15:43
#32	4444	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 16:04	2021/12/31 16:16
#30	2222	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 16:03	2021/12/31 16:16
#29	11111	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 16:03	2021/12/31 16:04
#26	发发发发发付	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 14:36	2021/12/31 15:09
#25	丰富的	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/12/31 14:36	2021/12/31 15:10
#14	订单管理	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/03/05 10:35	2021/03/05 10:41
#13	订单支付	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/03/05 10:34	2021/03/05 10:41
#12	购物车结算	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/03/05 10:34	2021/03/05 10:41
#1	用户注册与登录	未开始	中	刘一手	Sprint 2021.1.1~2...	2021/03/05 10:25	2021/12/31 15:57

Coordinate development plan

After the requirement research is completed, a requirement pool review meeting is held. After the requirements gathered are discussed and reviewed, the project leader approves the development plan. An iteration can serve as the unit of the development plan.



Using this feature, you can split larger plans (including but not limited to development plans) into specific issues (such as requirements and tasks) assigned to specific assignees. All requirements created by the product manager in the early phase can also be seamlessly integrated into the iteration plan.

ID	标题	优先级	状态	处理人	创建人	截止日期	创建时间
#27	客户端订单取消功能	中	未开始	未指定	Livia	6月5日截止	2021/06/04 16:07
#26	客户端支持订单修改功能	紧急	未开始	未指定	Livia	6月5日截止	2021/06/04 16:07
#25	客户端查看订单详情功能	低	未开始	未指定	Livia	6月5日截止	2021/06/04 16:07
#24	客户端订搜索功能	中	未开始	未指定	Livia	6月5日截止	2021/06/04 16:07
#15	测试手机号注册成为商城用户功能	中	开发中	未指定	Livia	6月4日截止	2021/06/04 16:07
#14	前端注册界面增加短信发送功能	中	已完成	未指定	Livia	6月4日截止	2021/06/04 16:07

Requirements can be broken down into sub-requirements or sub-tasks and associated with bugs and test cases. You can configure other resources required to implement a requirement as a pre-issue, check if a requirement is blocked by another issue, reference other requirements or tasks as resources of this issue, or check which resources have referenced this issue.

The screenshot displays a requirement card in the CODING DevOps system. The card title is '客户端订单取消功能' (Client Order Cancellation Function) with ID #5. The main content area shows a description field with a '点此编辑描述' (Click here to edit description) prompt. Below the description are sections for '阻塞关系' (Blockers), '前置事项' (Pre-conditions), and '项目集工作项' (Project Items). A dropdown menu is open over the '关联' (Associate) button, listing options: '关联测试用例' (Associate Test Case), '关联项目集工作项' (Associate Project Item), '阻塞关系' (Blockers), and '引用资源' (Reference Resources). The '前置事项' section shows a pre-condition '#4 q2' and a search bar for quick association. The '项目集工作项' section shows a task '#1 迭代' (Iteration) with a '10月1日截止' (Deadline Oct 1) and '未开始' (Not Started) status. The '活动日志' (Activity Log) section shows a list of actions: '+ 陈星 创建了需求' (Created requirement), '陈星 关联了工作项 #1-迭代' (Associated task), and '阿蓝 更新了需求标题' (Updated title). The right sidebar provides metadata: Status: 未开始 (Not Started), Assignee: 未指定 (Not Assigned), Priority: 中 (Medium), Progress: 0%, and a creation time of 4 hours ago.

Assign development task



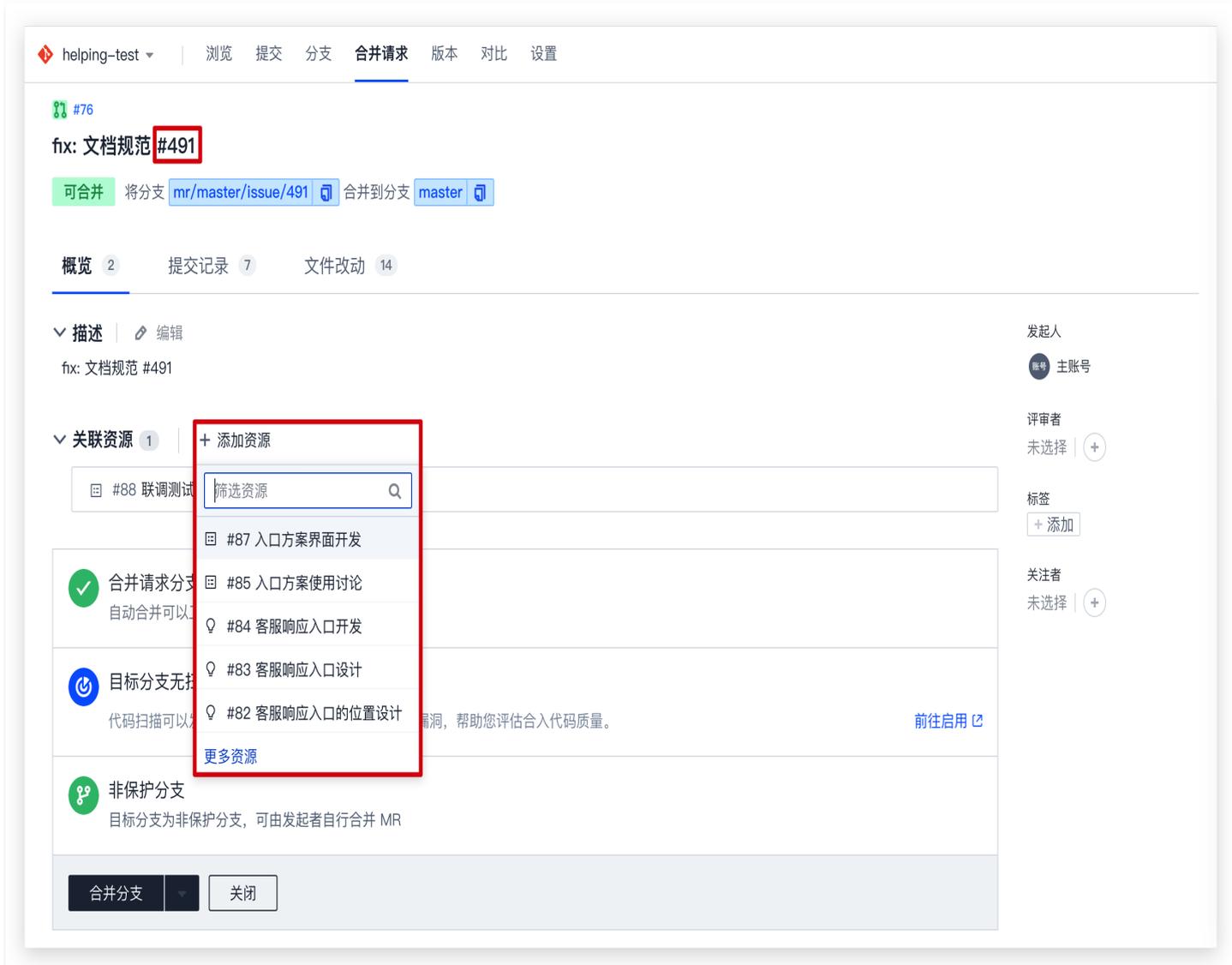
In an iteration plan, team members can collaborate by creating issues or accepting issues assigned by others. For example, you can break down a requirement to launch a customer service entry into development and test tasks. After the development has been completed, you can continue breaking down the requirement into a promotion task and hand it over to the operations department for marketing campaigns.

Execution plan

After the various plans have been completed and assigned to specific assignees, team members can view tasks to be completed in **workspace > My tasks** on the team homepage, along with merge requests initiated by them or pending checks, build tasks in continuous integration, and pending continuous deployment release orders.

ID	标题	状态	优先级	截止日期	迭代	项目
#41	点点滴滴多	未开始	中			飞鸟集市
#31	完成数据结构设计	未开始	中	2021年12月31日截止		Demo-大瀑布
#30	增加弹窗邮件邀请会员, 完成邀请会员互动功能	处理中	中	2021年12月31日截止		Demo-大瀑布
#28	测试任务1	未开始	中	2021年12月31日截止		Demo-大瀑布
#18	完成开发测试环境的搭建	未开始	高	2021年12月26日截止		Demo-大瀑布
#668	完成测试环境流水线	处理中	中		Q3 - Sprint3 [客服...	示例项目
#108	进入购物车后可以查看所有添加至购物车的商品...	未开始	中	2021年9月20日截止	Q1 - Sprint2 [商品...	示例项目

For development tasks, you can also directly reference merge request records in code repositories. For details, see [Reference resources & upload attachments](#). After associating the items, you can see the code commit record and development status in the development task.



helping-test | 浏览 提交 分支 **合并请求** 版本 对比 设置

#76

fix: 文档规范 #491

可合并 将分支 `mr/master/issue/491` 合并到分支 `master`

概览 2 提交记录 7 文件改动 14

描述 | 编辑

fix: 文档规范 #491

发起人
主账号

评审者
未选择

标签
+ 添加

关注者
未选择

+ 添加资源

筛选资源

- #88 联调测试
- #87 入口方案界面开发
- #85 入口方案使用讨论
- #84 客服响应入口开发
- #83 客服响应入口设计
- #82 客服响应入口的位置设计

更多资源

合并分支 关闭



引用资源 | +

被引用

- #472 docs: 团队构建计划模板 #471 已合并
- #336c3e Accept Merge Request #472: (mr/master/issue/471 -> master)
- #e67cc1 docs: 团队构建模板 #471

In the menu on the right of the issue details page, you can log time by entering the estimated time and time spent on issues. A complete worklog will be automatically created for retrospectives and efficiency analysis after iterations have been completed.

The screenshot displays the Tencent Cloud CODING DevOps interface. A modal dialog titled "登记工时" (Log Time) is open, showing a progress bar for "已记录 48 小时" (48 hours recorded) and "剩 52 小时" (52 hours remaining). The dialog includes input fields for "使用工时" (Used Time) and "剩余工时" (Remaining Time), both set to 48 and 52 hours respectively. It also has a "开始时间*" (Start Time) dropdown set to "2021-06-20 17:42" and a "工作描述" (Work Description) text area. Buttons for "确定登记" (Confirm Log) and "取消" (Cancel) are at the bottom.

The background shows a task detail view for "第一次迭代" (First Iteration). The task is in "进行中" (In Progress) status with a priority of "中" (Medium). The estimated time is 100 hours, and the recorded time is 48 hours, leaving 52 hours remaining. The task is assigned to Livia and has a progress of 0%. The "查看工时日志" (View Time Log) link is highlighted with a red box.

Before leaving work, members can change the status of a daily task to "completed" and update development progress percentage. The iteration progress will update as each issue progresses.

#39 1人关注

客服入口规划及页面设计

编辑描述 上传附件 分解需求 分解任务 关联缺陷

点此编辑描述

子任务 | +

2/3 已完成

- #40 入口方案使用讨论 已完成
- #41 入口方案界面开发 已完成
- #42 联调测试 未开始

活动日志 工时日志

全部 只看日志 只看评论

- + Livia 创建了需求 2021-06-22 17:02
- 🔗 Livia 创建并关联了任务 #40-入口方案使用讨论 2021-06-22 17:03
- 🔗 Livia 创建并关联了任务 #41-入口方案界面开发 2021-06-22 17:03
- 🔗 Livia 创建并关联了任务 #42-联调测试 2021-06-22 17:03

状态: 开发中

处理人: Livia

所属需求: 未关联需求

迭代: 第一次迭代

优先级: 中

需求类型: 需求类型

开始日期: 2021/06/21

截止日期: 2021/06/30

进度: 66.67%

预估工时: 100 小时

工时记录: 已记录 48 小时 剩 52 小时

查看工时日志

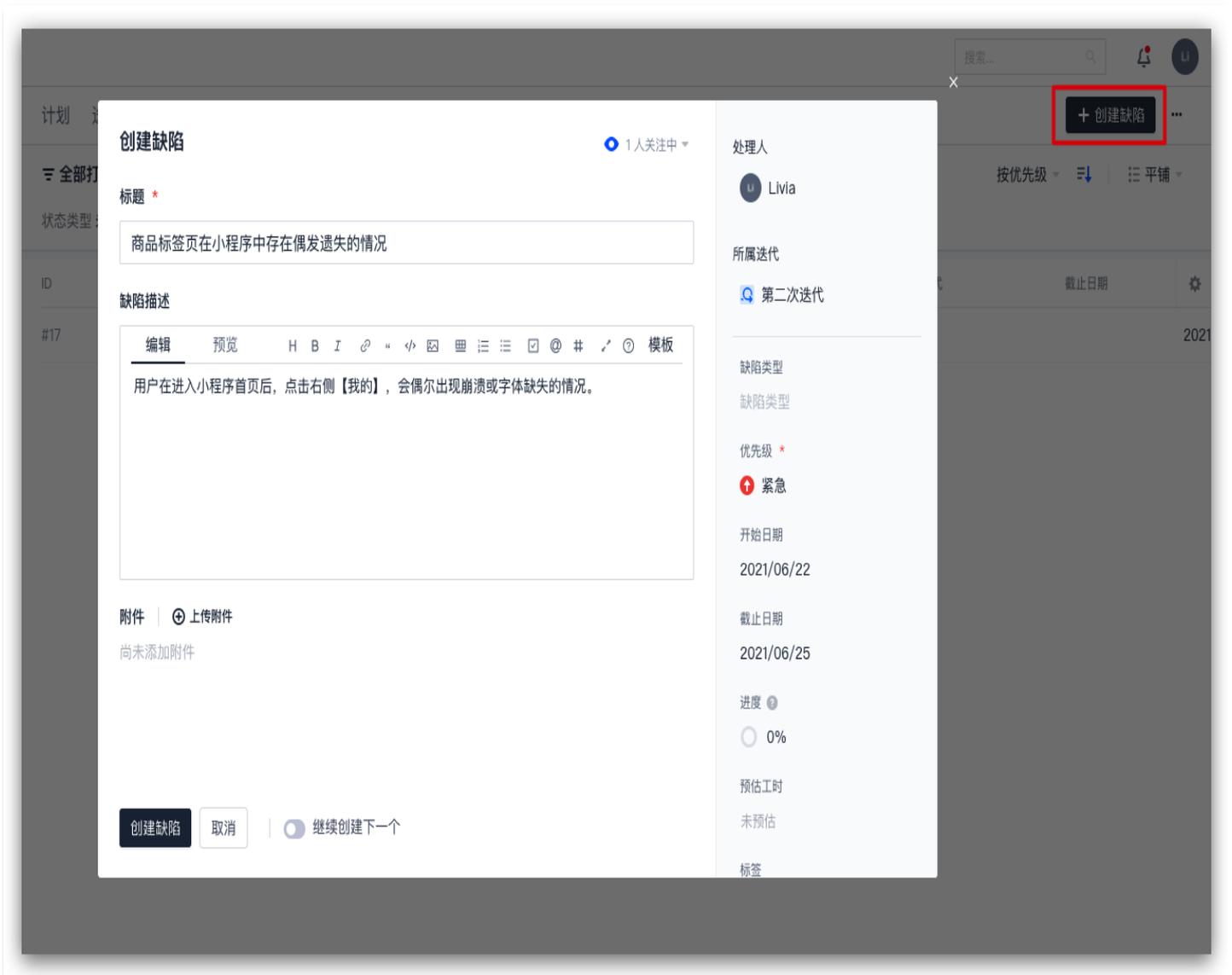
标签: +

腾讯会议: 快速会议 预定会议

若含有子事项, 则当前进度不可修改。
父事项进度= SUM(直接子事项进度) + SUM(直接子事项数)

Test stage

The test phase is crucial to the closed development loop. Self-testing by developers usually resolves most common problems, but it is not enough. Testing helps to identify fundamental logic problems and possible missing items during the development process. CODING's built-in automated testing tools, such as Code Scan and Artifact Scan, help testers quickly create a bug and associate requirements or tasks in an iteration after a bug is found.

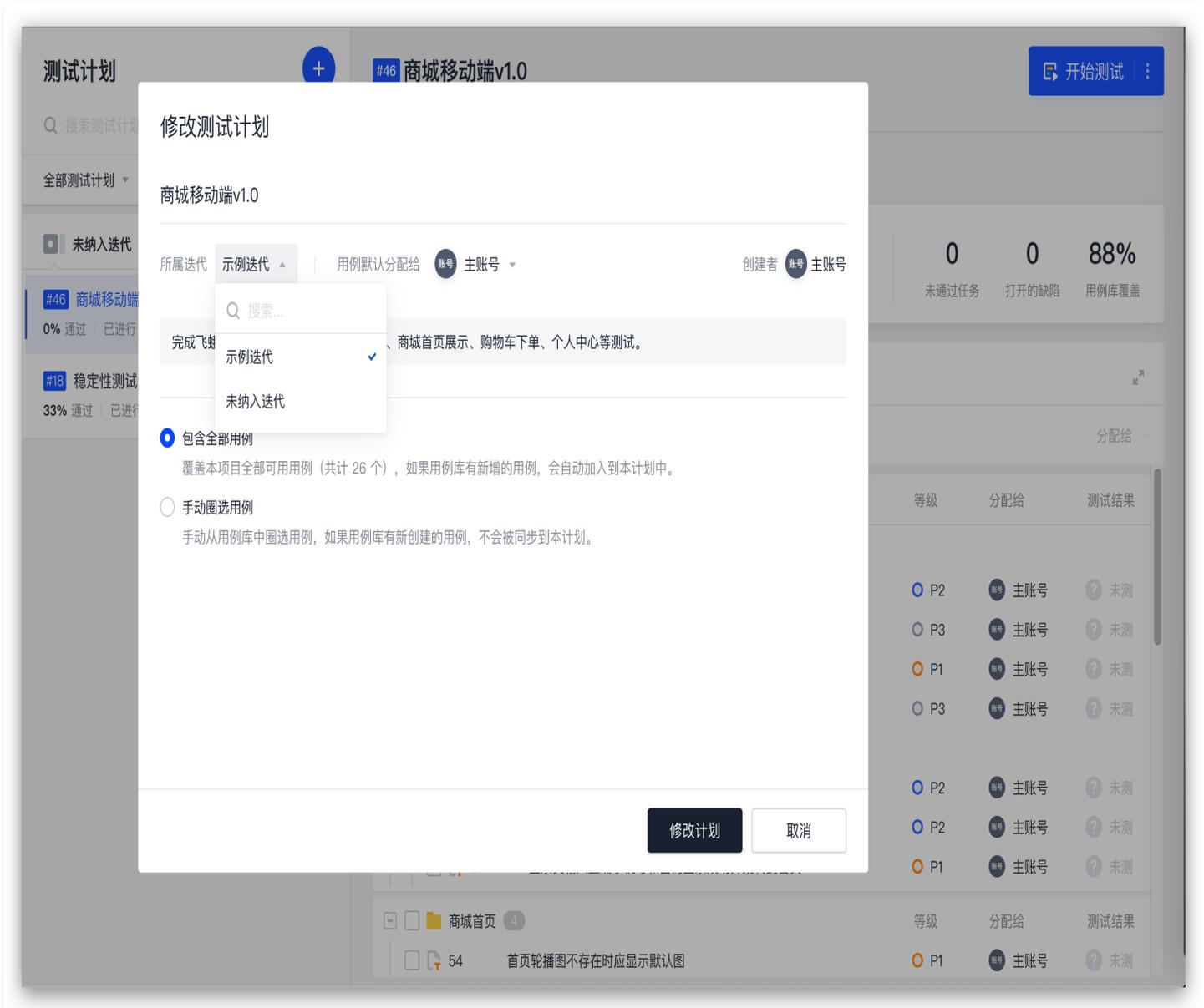


You can also log time and update progress percentages for bug fixes. Besides assigning and entering test tasks in an issue, testers can go to [Test Management](#) > [Use Case Management](#) to write test cases.

The screenshot displays the '用例管理' (Test Case Management) interface. On the left, there is a navigation menu with options like '测试管理', '用例管理', '用例评审', '自动化用例库', '测试计划', and '测试报告'. The main area shows a list of test cases under the '全部用例' (All Test Cases) tab. The list is organized into folders such as '注册与登录', '商城首页', and '个人中心'. Each test case entry includes a title, a priority level (e.g., P2), an estimated time, a review status, and the number of test runs.

用例等级	全部	标签	全部	工时	全部	评审状态	全部	输入ID 或标题搜索	按原始排序
注册与登录 (7)									
注册 (4)									
14		库存为0的商品详情页的【加入购物车】按钮应不可点击	P2	-	-	1			
4		注册页输入错误手机验证码	P2	-	-	1			
5		注册页输入手机号已存在	P2	-	-	1			
6		输入正确手机号、验证码和密码注册成功跳转到个人信息完善页	P2	-	-	1			
登录 (3)									
7		登录页输入不存在的手机号	P2	-	-	0			
8		登录页输入正确手机号和错误密码	P2	-	-	0			
9		登录页输入正确手机号和密码登录成功并跳转到首页	P2	-	-	0			
商城首页 (5)									
10		首页轮播图不存在时应显示默认图	P2	-	-	0			
3		注册页输入手机号格式不合法	P2	-	-	0			
12		首页按热度排序按钮点击后商品按销量由大到小排序	P2	-	-	0			
13		秒杀栏目中商品需显示原价和秒杀价	P2	-	-	0			
72		下单未支付的订单可在【未支付】Tab 页查询到	P2	-	-	0			
个人中心 (2)									
我的钱包 (3)									
22		我的钱包中优惠券数量应与已领取的数量一致	P2	-	-	1			
20		下单商品总额若小于99元则显示运费金额为6元	P2	-	-	1			
23		我的钱包中已获取积分总量应为已消费金额的1/10	P2	-	-	1			

In Test Management > Test Plan, the iteration of the test can be configured in Edit.



Project Release

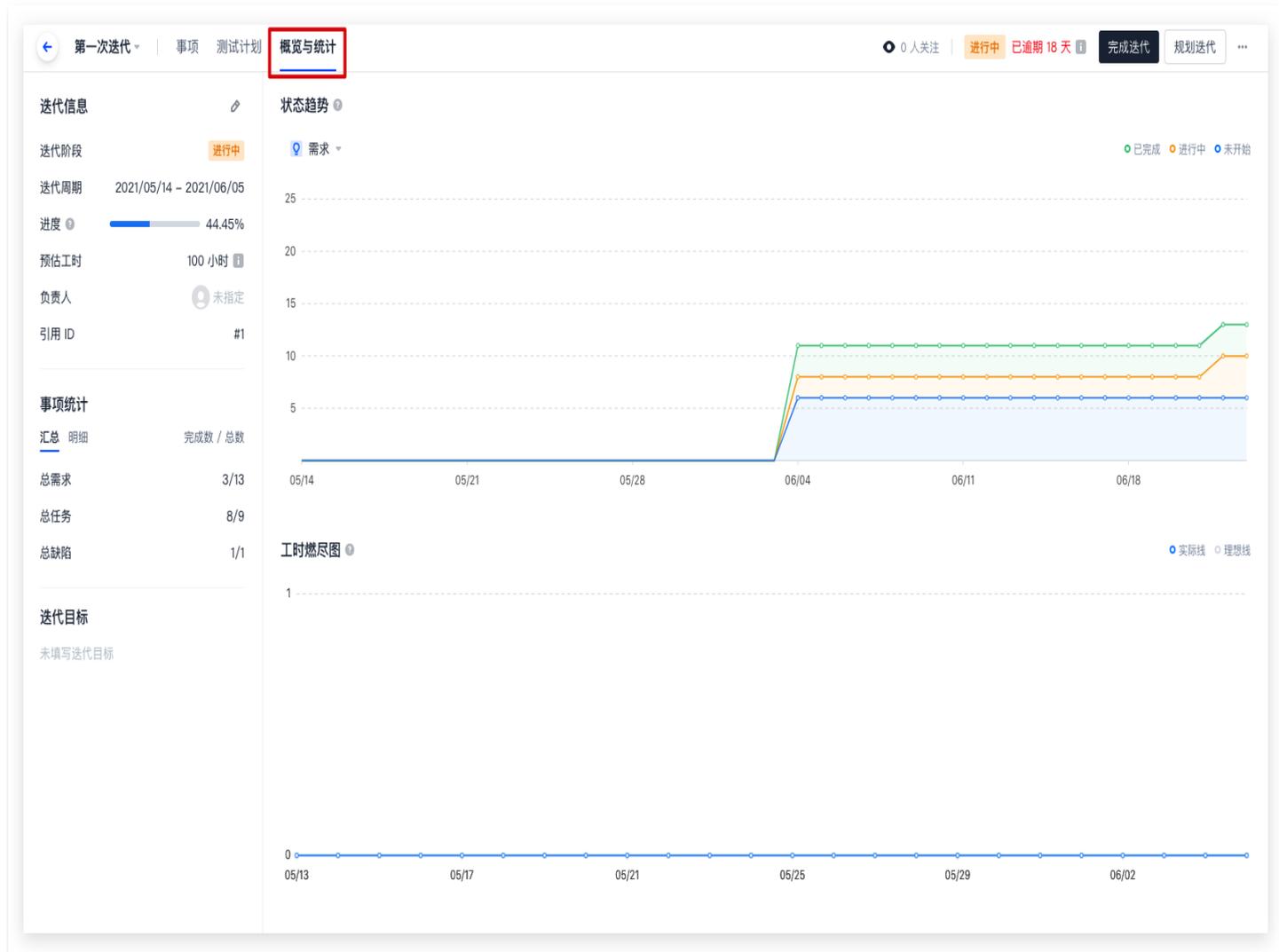
After the basic development task has been completed, you can use CODING's continuous integration/deployment services to quickly validate the code.

Note:

Extended reading:

- [Continuous Integration – Getting Started](#)
- [Continuous Deployment – Getting Started](#)

After the iteration plans have been completed, you can view the status trend and work hours burn-down chart for the iteration cycle in **Overview and statistics**. Managers can keep track of the team's work progress under the plan at any time.



Customize Team Workflow

In addition to the default issue statuses, you can customize the workflow of various issues in the issue Workflow in **Project Settings > Project Collaboration > Item Type**. For details, see [Custom Workflow](#).

项目协同

协作配置
管理事项类型与协作类型

事项类型

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	🔍 ⚙️ ...
任务	任务是指为实现某个目标或需求所进行的具体活动。	📅 ⚙️ ...
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	🔍 ⚙️ ...

协作类型

经典项目管理
管理开发计划、需求和任务，用于基于时间或基于交付的项目

更改协作类型

Issue Management

Import and Export Issues

Last updated: 2024-09-05 16:20:23

This document describes how to import and export issues in CODING Project Management.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click Project Collaboration in the menu on the left.

Description of the Feature

Epics, requirements, tasks, and defects are collectively referred to as issues, supporting bulk import and export. You can choose **Import Issues**, **Export Current Filtered Issues**, **Export All Issues** from the menu in the upper right corner of the issue list, and operate according to the templates provided by CODING. The following text will take **Requirements** as an example to demonstrate how to import and export issues.

ID	标题	优先级	状态	处理人	创建人	迭代
#18	用户可对未支付的订单执行取消订单操作	中	未开始	未指定	Livia	
#17	管理员可在商城后台对订单执行发货操作	中	未开始	未指定	Livia	
#16	用户可在手机端搜索并查看指定的订单详情	中	未开始	未指定	Livia	
#15	通过访问邀请链接可注册成为商城用户	中	未开始	未指定	Livia	

Import Issues

1. Select **Import Requirements** in the menu in the upper-right corner of the issue list page.

待规划 迭代 | 全部事项 史诗 需求 任务 缺陷

+ 创建需求 ...

≡ 全部打开的 | ^ 按优先级

状态类型 未开始,进行中 处理人 全部 + 筛选 标题或描述...

ID	标题	优先级	状态	处理人	创建人	
#18	用户可对未支付的订单执行取消订单操作	订单管理	中	未开始	未指定	Livia
#17	管理员可在商城后台对订单执行发货操作	订单管理	中	未开始	未指定	Livia

2. Click Download Template and fill in the information as required as shown below.

从 Excel 导入需求

拖拽或点击此处选择文件
Excel 或 CSV 文件

- 请上传一个 Excel/CSV 文件，文件格式符合模板格式 [下载模板](#)
- 确保表格内只有一个工作簿，如果有多个工作簿只有第一张会被处理
- 单次最大支持导入 5000 条记录
- 上传 CSV 文件，需确保 CSV 使用的是逗号分隔符
- 需求支持两种层级关系场景导入，「父事项标题」需确保在导入模版中同时创建，「父事项ID」需确保系统已存在该事项
- 多选项值之间用竖线分隔，例如A|B|C

导入 关闭

3. The template includes **title (required), description, assignee, status, priority, and due time**. After you fill in the template, upload an Excel/CSV file.

	A	B	C	D	E	F
1	标题	描述	处理人	状态	优先级	截止时间
2	订单列表支持批量导出功能。		张小敏	待处理	中	2019/1/1
3	购物车可自动检测商品的优惠活动并给出提示。	需求背景 1、用户期望能够给出购物车所有商品所适用的优惠活动， 2、能够自动选出对用户最优惠的活动并应用， 3、用户可根据情况自行选择其他优惠活动。 注意：邮费不参与活动，金币不能用于抵扣现金。		开发中	高	2019/12/1
4	用户登录时候需要使用手机验证码二次验证。		叶小兰	已完成		2019/12/11
5	删除订单时候需要给出二次提示，确认后删除。		张航	已完成	低	2020/1/1

Note:

Issue fields are used to describe the current status, due date, assignee, priority, and other information of this issue. If required fields are preset in the project, this rule is ignored during the issue import; if default values are preset for the fields in the project, they are auto-filled during the issue import. For more information, see [Custom Issue Fields](#).

4. Check the import result.

After the import is complete, you will be notified by a prompt message on the import page or system notification. If the import fails, download the error log as instructed, and import again after changes.

 导入成功

成功导入 4 条需求

关闭

 导入时检测到问题

3 条需求无法导入，您可以 [下载错误记录](#) 对照修改后重新导入

重新上传

关闭

Export Issues

1. In the menu in the upper-right corner of the issue list page, you can select **Export All Requirements** or export the current filtered requirements as needed.

Note:

In the tree view, subtasks under requirements will also be exported.

- To export all filtered issues, click ‘...’ at the top right corner of the page. Then click ‘Export Current Filtered Requests’ from the drop-down menu.



The screenshot shows the issue list interface. At the top right, there is a menu with a '+ 创建需求' button and a three-dot menu. The three-dot menu is open, showing '导入需求' and '导出当前筛选需求' (highlighted with a red box). Below the menu, there are filters for '全部打开的', '筛选: 3个条件', and '状态类型 未开始,进行中'. A search bar is also present. The main table lists issues with columns for ID, Title, Priority, Status, Assignee, Creator, Iteration, Deadline, and Creation Time.

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间
#14	双十一优惠券发放	0/1 紧急	未开始	[Avatar]	[Avatar]			2023/09/06 14:20
#2	双十一优惠券发放	紧急	处理中	[Avatar]	[Avatar]			2023/09/06 14:09

- To export a selection of filtered issues, click ‘Batch Operation’ at the bottom right corner of the page. After selecting the issues, click ‘Export’.

待规划 迭代 版本 | 全部事项 需求 任务 缺陷 + 创建需求 ...

全部打开的 ▾

筛选 3个条件 ▾ 状态类型 未开始,进行中 ▾ 处理人 全部 ▾ 事项类型 全部 ▾ 排序 1个条件 平铺

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间
<input checked="" type="checkbox"/> #424	11111	高	测试中			迭代demo2023	2023年6月22日截止	2023/07/07 15:21
<input checked="" type="checkbox"/> #1026	test	中	未开始	未指定				2023/10/23 16:32
<input type="checkbox"/> #1002	订单列表支持批量导出功能。	中	未开始				2019年1月1日截止	2023/09/21 17:06
<input type="checkbox"/> #428	子需求1 <small>子事项</small>	中	未开始	未指定				2023/07/14 13:57
<input type="checkbox"/> #402	9	中	未开始	未指定		技术支持岗位 ...	2023年8月8日截止	2023/06/09 15:5
<input type="checkbox"/> #401	8	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #400	7	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #399	6	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #398	5	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #397	4	中	未开始			技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #396	3	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #395	2	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5
<input type="checkbox"/> #394	1	中	未开始	未指定		技术支持岗位 ...		2023/06/09 15:5

x 已选中 2 个事项 复制 修改 导出 删除

2. After a successful export, you can click **Download File** and view the export results.



ID	标题	描述	状态	处理人	优先级	截止日期
18	用户可对未支付的订单执行取消订单操作		未开始		中	
17	管理员可在商城后台对订单执行发货操作		未开始		中	
16	用户可在手机端搜索并查看指定的订单详情		未开始		中	
15	通过访问邀请链接可注册成为商城用户		未开始		中	
14	管理员可取消未发货且状态异常的订单		未开始		中	
13	用户可在“个人信息”中编辑个人基本信息，包括修改密码		未开始	Livia	中	
12	管理员可在商城后台搜索订单		未开始		中	
11	管理员可在商城后台手工为用户下单		未开始		中	2021-06-11
9	用户可通过短信验证码登录商城		开发中		中	
5	用户可通过手机号注册账户		开发中	Livia	中	2021-06-06

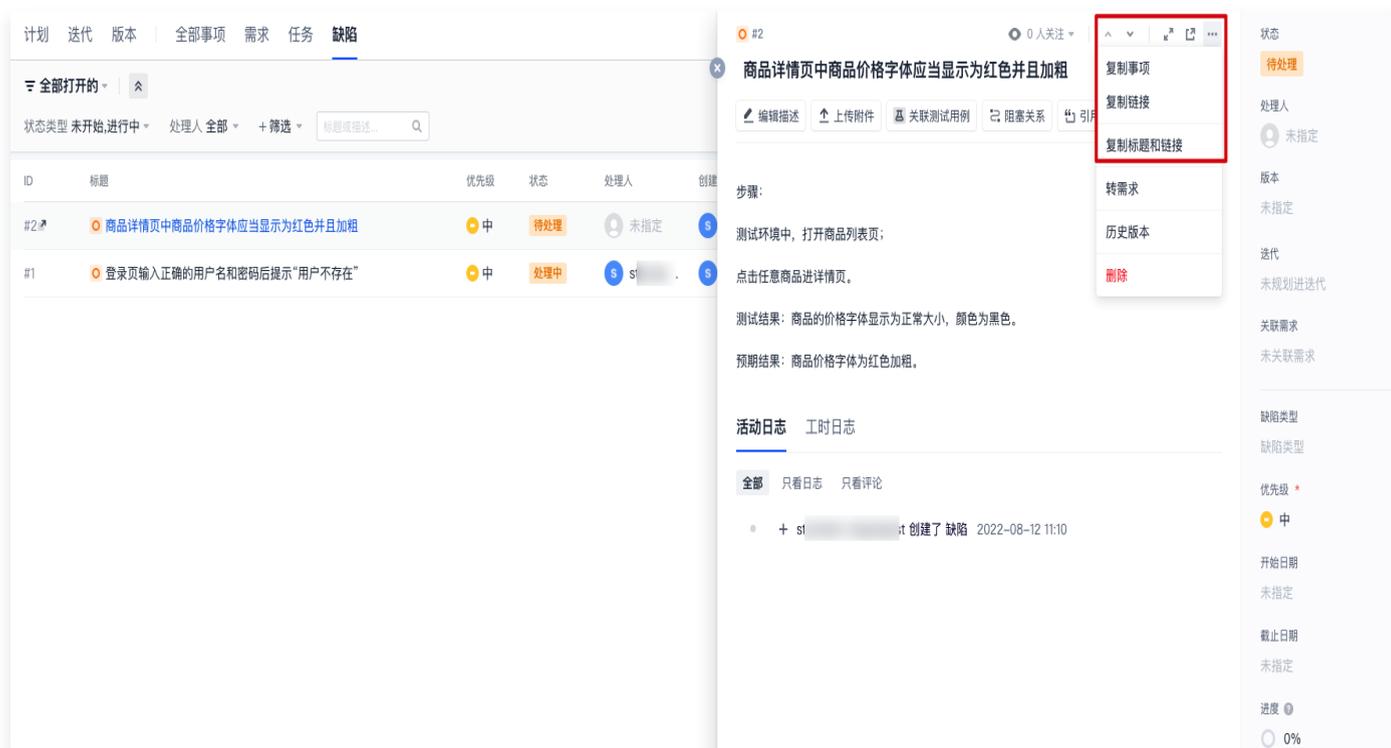
Copy Item or Link

Last updated: 2024-09-05 16:20:42

This article provides a detailed introduction on how to copy items or links in CODING-PM.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.
4. After selecting the target item, click the **...** at the top right corner of the item to perform the copy operation.



Copy Item

The Copy Item feature allows you to quickly create a replica of the current item.

Click **Copy Item** to create a replica of the current item. The replica inherits the description, uploaded attachments, handlers, and other information from the original item. You can also choose to transfer the replica to another project or convert it to another item type, such as changing a requirement to a task.

The screenshot displays a defect management interface. At the top left, there is a '复制' (Copy) button and a '缺陷' (Defect) label. The main content area shows a defect description: '商品详情页中商品价格字体应当显示为红色并且加粗' (The font of the product price in the product detail page should be displayed in red and bold). Below the description, there are steps for testing: '测试环境中, 打开商品列表页; 点击任意商品进详情页。 测试结果: 商品的价格字体显示为正常大小, 颜色为黑色。 预期结果: 商品价格字体为红色加粗。' (In the test environment, open the product list page; click any product to go to the detail page. Test result: The font of the product price is displayed in normal size, color is black. Expected result: The font of the product price is red and bold.)

On the right side, there is a sidebar with various fields. The '目标项目' (Target Project) field is highlighted with a red box and contains '当前项目' (Current Project). The '目标类型' (Target Type) field is also highlighted with a red box and contains '缺陷' (Defect). Other fields include '处理人' (Assignee) set to '未指定' (Not specified), '关联需求' (Associated Requirements) set to '未关联需求' (Not associated requirements), '版本' (Version) set to '未指定' (Not specified), '所属迭代' (Iteration) set to '未规划进迭代' (Not planned for iteration), '缺陷类型' (Defect Type) set to '缺陷类型' (Defect type), '优先级' (Priority) set to '中' (Medium), and '开始日期' (Start Date).

Sub-items in the parent item also support the copy operation.

The screenshot shows a parent item titled '标准化协同史诗' (Standardized Collaboration Epic) with ID #128. It has 1 person following. The item is in the '未开始' (Not started) state. The parent item has several sub-items: '#133 这是一个子需求' (This is a sub-request), '#134 testing', and '#132 testing'. A context menu is open over the '#133' sub-item, showing options: '新窗口打开' (Open in new window), '复制链接' (Copy link), '复制事项' (Copy item), '创建子需求' (Create sub-request), '更改父需求' (Change parent request), '解除关联' (Remove association), and '删除' (Delete). The '复制链接' and '复制事项' options are highlighted with a red box.

Copy Link

Each item has a unique URL link. Click **Copy Link** or the "Copy" button at the top left of the item to automatically copy the item's URL to the clipboard.

The screenshot displays the Tencent Cloud CODING DevOps interface. On the left, a table lists several bugs. The main panel shows the details of bug #2, titled "商品详情页中商品价格字体应当显示为红色并且加粗". The bug is in the "待处理" (Pending) state with a medium priority. The "步骤" (Steps) section includes instructions to open the product list page and click on a product to view details. The "测试结果" (Test Results) section states that the price font is currently normal size and black, while the "预期结果" (Expected Results) is that it should be red and bold. The "附件" (Attachments) section shows a file named "edall43n-20221213-165317.zip" (20.1MB).

ID	标题	优先级	状态	处理人	创建
#52	商品详情页中商品价格字体应当显示为红色并且加粗	中	待处理	未指定	5
#51	购物车页面异常	中	待处理	未指定	5
#2	商品详情页中商品价格字体应当显示为红色并且加粗	中	待处理	未指定	5
#1	登录页输入正确的用户名和密码后提示“用户不存在”	中	处理中	standar...	5

Copy Title and Link

Click **Copy Title and Link** to copy the current item's title and link to the clipboard with one click, often used for collaboration within team instant messaging tools.

The screenshot shows a dialog box with a toolbar at the top containing icons for copy, paste, image, list, check, folder, phone, and chat. The main text area contains the bug title "商品详情页中商品价格字体应当显示为红色并且加粗" and the URL "http://[redacted]/p/dolftestingcases/bug-tracking/issues/2/detail". A "快速会议" (Quick Meeting) button is located on the right side.

Filter Issues

Last updated: 2024-09-05 16:21:12

This document describes how to filter issues in CODING Project Collaboration.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

In Project Collaboration, filters are available on the list pages of Pending Planning (Scrum agile project management mode), Plans (classic project management mode), Iterations, and All Issues, helping team members query and sort issues by specified conditions. CODING provides a system filter and a custom filter. The former is unable to be modified or deleted. The following shows how to use and customize filters in All Issues.

New Filter Conditions

Under the **All Issues** section, the filter supports custom combinations of multiple attribute conditions to filter issues.



The screenshot displays the 'All Issues' section of the CODING Project Collaboration interface. At the top, there are navigation tabs: '计划', '迭代', '版本', '全部事项', '需求', '任务', and '缺陷'. The '全部事项' tab is selected. On the right, there are buttons for '标签页扩展' and '+ 创建事项'. Below the tabs, a filter bar shows '全部打开的' with a dropdown arrow. Underneath, there are filter conditions: '筛选: 3个条件', '状态类型: 未开始, 进行中', '处理人: 全部', and '事项类型: 全部'. To the right of these conditions is a search box labeled 'Q 标题或描述', a '排序: 优先级' button, and a '平铺' button. Below the filter bar is a table of issues with columns: ID, 标题, 优先级, 状态, 处理人, 创建人, 迭代, 截止日期, 创建时间, and 更新时间. Two issues are visible: #13 '更新 CODING DevOps 文档内容' and #10 '修改文档内容'.

You can also use the "Title" and "Description" fields in the search box for fuzzy search. Multiple keywords (separated by spaces, with an 'or' relationship) are supported for fuzzy matching of titles.

计划 迭代 版本 | **全部事项** 需求 任务 缺陷 标签页扩展 + 创建事项 ...

全部打开的 保存为新视图 清除变更

筛选: 3个条件 状态类型 未开始,进行中 处理人 全部 事项类型 全部 排序: 优先级 平铺

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间	更新时间	⚙️
#13	更新 CODING DevOps 文档内容	1/1	中	测试中	Ru R	Ru R		2023/06/16 15:14	2023/06/19 17:50	
#10	修改文档内容	1/1	中	测试中	Ru R	Ru R		2023/06/16 14:20	2023/06/19 17:50	

Configure Default Filter

- The filter under the All Issues section has built-in system filters that cannot be modified or deleted. You can change the search conditions from the dropdown menu on the right side of the filter.

计划 迭代 版本 | **全部事项** 需求 任务 缺陷 + 创建事项 ...

全部打开的 搜索视图名称 进行中 处理人 全部 事项类型 全部 排序: 优先级 平铺

- 我未完成的
- 分配给我的
- 我经办的
- 我创建的
- 我关注的
- 全部打开的 默认
- 全部
- + 新建视图
- 固定到左侧

优先级	状态	处理人	创建人	迭代	截止日期	创建时间	更新时间	⚙️
中	待处理	未指定	PMP		2022年12月13日...	2022/12/13 18:42	2022/12/13 18:42	
中	处理中	未指定	PMP			2022/11/21 14:39	2022/11/21 14:39	
中	未开始	未指定	PMP			2022/11/21 14:38	2022/11/21 14:39	
中	处理中	未指定	PMP			2022/11/21 14:38	2022/11/21 14:39	
中	未开始	未指定	PMP	3.0		2022/11/18 14:27	2022/11/18 14:27	

- Through the ... menu behind the filter conditions, you can set the current filter condition as the default filter. Modified settings will be saved, and the filter will be used by default the next time you access All Issues.



Custom Filter

Create a custom filter

1. In the filter dialog at the top left corner of the issue list, click Add Filter Conditions. After modifying the filter conditions and values, click the pinned icon on the right side to pin or hide the filter conditions in the action area.



2. The task header is used to describe various parameters. You can refer to the [Custom Task Header](#) to make adjustments, which will help in sorting the filtered issues. The adjusted headers will be saved under the current filter conditions.

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间	更新时间	
#34	用户故事	中	未开始					2021/12/30 14:58	2022/03/22 14:01	
#35	子工作项	中	未开始					2021/12/30 14:59	2021/12/30 14:59	
#32	美术需求	中	文案确认					2021/12/30 14:56	2021/12/30 14:56	
#31	用户故事	中	未开始					2021/12/30 14:50	2022/03/22 14:01	
#14	增加客服入口	中	处理中					2021/08/26 16:19	2022/03/22 14:01	
#15	客服系统入口规划	中	未开始	未指定				2021/08/26 16:20	2021/08/26 16:20	
#16	客服系统页面设计	中	未开始	未指定				2021/08/26 16:20	2021/08/26 16:20	
#17	客服系统页面开发	中	未开始	未指定				2021/08/26 16:20	2021/08/26 16:21	
#13	支持商户快捷回复用户评论+支持图片回复能力	中	未开始				7月26日截止	2021/08/26 16:12	2022/07/11 14:47	
#12	第三方客服系统选型和评估	中	处理中					2021/08/26 16:11	2022/03/22 14:02	
#2	店铺 PV/UV 统计功能	中	处理中			Q4 - Sprint1	2021年9月24日截止	2021/08/26 16:09	2022/03/22 14:02	
#1	用户可分享直播链接到第三方平台	中	未开始			Q4 - Sprint1	2021年9月30日截止	2021/08/26 15:59	2022/01/06 10:20	

3. If the settings are incorrect, select **Clear Changes**. If the filter settings are correct, click **Save as New View** and enter a name to save. You can set it as a team filter, making it visible to other project members.
- Personal View: Only visible to yourself, not to other members of the team.
 - Team View: Visible to all members in the project.

计划 迭代 版本 | 全部事项 需求 任务 缺陷

全部打开的 ▾ 保存为新视图 清除变更

筛选 · 4个条件 状态类型 未开始,进行中 ▾ 处理人

ID 标题

#13 更新 CODING DevOps 文档内容

#10 修改文档内容

保存为新视图 ✕

包含筛选条件、排序、显示设置、搜索内容和视图模式。

* 视图名称

新建筛选器 1

* 可见性

个人视图 团队视图

项目内其它成员均可见。

确定 取消

4. You can view your custom filter in the dropdown menu of the filter list.

The screenshot shows the '全部事项' (All Items) view in CODING DevOps. A dropdown menu titled '新建筛选器 1' (New Filter 1) is open, listing various filter options. The '新建筛选器 1' option is highlighted with a red box. The background shows a table of items with columns for ID, Title, Priority, and Status.

ID	标题	优先级	状态
#13	更新 CODING DevOps 文档内容	中	测试中
#10	修改文档内容	中	测试中

In the dropdown menu of the filter list, click Pin to Left to pin the filter view to the left sidebar for quick switching and positioning.

The screenshot shows the '全部事项' (All Items) view with the filter view '新建筛选器 1' pinned to the left sidebar. The sidebar is highlighted with a red box and contains a '视图' (View) section with a '+' icon. The filter view is now a permanent part of the sidebar, allowing for quick switching. The main content area shows the filtered items.

ID	标题
#13	更新 CODING DevOps 文档内容
#10	修改文档内容

Modify a custom filter

In the dropdown menu of the filter list, select the custom filter you want to modify, change the search conditions and sorting. Click **Save as New View** to save as a new filter; click **Save Changes** to overwrite the current filter. If the settings are incorrect, select **Clear Changes**.

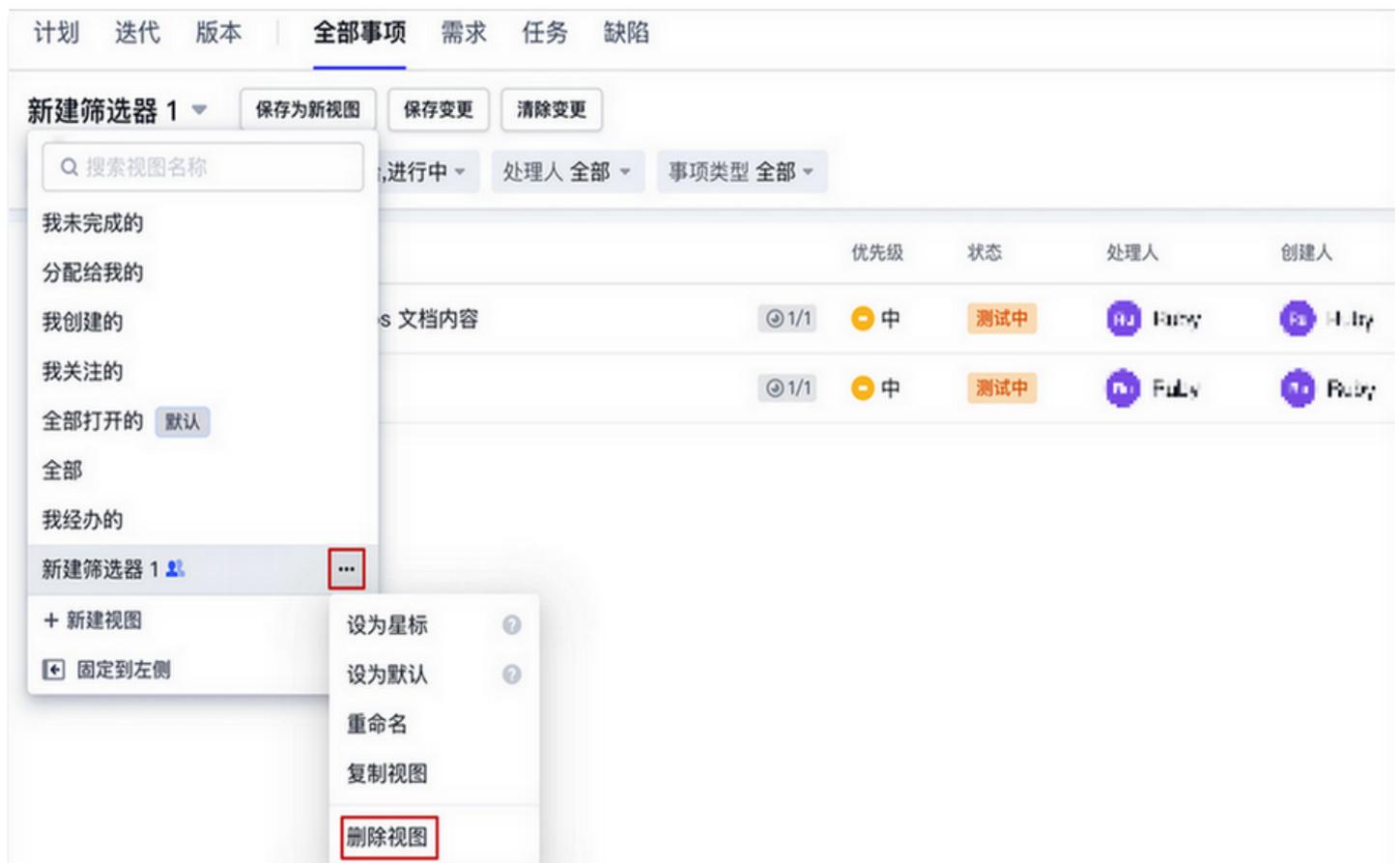


The screenshot shows the '全部事项' (All Items) view in CODING DevOps. At the top, there are navigation tabs: '计划', '迭代', '版本', '全部事项', '需求', '任务', and '缺陷'. Below the tabs, a dropdown menu for '新建筛选器 1' is open, showing three options: '保存为新视图' (Save as New View), '保存变更' (Save Changes), and '清除变更' (Clear Changes). Below the menu, there are filter conditions: '筛选 · 4个条件', '状态类型 未开始,进行中', '处理人 全部', and '事项类型 全部'. A table of items is visible below, with columns for ID, Title, Priority, Status, Assignee, and Creator.

ID	标题	优先级	状态	处理人	创建人
#13	更新 CODING DevOps 文档内容	1/1	中	测试中	Fuby
#10	修改文档内容	1/1	中	测试中	Fuby

Delete a custom filter

Through the **...** menu behind the filter list, click **Delete View** to delete the custom filter.



The screenshot shows the same interface as above, but with the '新建筛选器 1' dropdown menu open. The menu items are: '我未完成的', '分配给我的', '我创建的', '我关注的', '全部打开的' (with '默认' sub-item), '全部', '我经办的', and '新建筛选器 1' (with a user icon). A secondary menu is open for '新建筛选器 1', listing actions: '设为星标', '设为默认', '重命名', '复制视图', and '删除视图'. The '删除视图' option is highlighted with a red box.

Batch Update Item Attributes

Last updated: 2024-09-05 16:21:26

This article provides a detailed introduction on how to batch update item attributes in CODING Project Collaboration.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

Item attributes refer to the status, story points, assignee, priority, and other information of an issue (requirement, task, or defect) as shown below:

创建 需求 1人关注中

输入事项标题 (⌘ + Enter 可快速创建)

需求背景

在此处简短的描述事项背景。

相关资料

- 1、提供附件，或 github pull 链接
- 2、（仅适用于新品文档）提供新品基本信息

需求类型

- 产品需求
- 用户需求
- 运营需求

附件 | 本地上传 | 其他方式

尚未添加附件

创建 取消 继续创建下一个

处理人

未指定

所属迭代

未规划进迭代

优先级 *

中

开始日期

未指定

截止日期

未指定

标签

+

进度 ?

0%

预估工时

未预估

Batch Modify Attributes

Project Collaboration supports batch modification of item attributes. For example, changing the assignee of multiple items to a specific project member. Enter the Project Collaboration feature of any project, click the batch operation button on the bottom right, and select the items whose attributes need to be changed.

待规划 迭代 版本 | 全部事项 史诗 需求 任务 缺陷 标签页扩展 + 创建需求 ...

全部打开的 按优先级 树状

事项类型 全部 状态类型 未开始,进行中 处理人 全部 + 筛选 标题或描述

ID	标题	优先级	状态	处理人	创建人	迭代	截止日期	创建时间	更新时间	
#34	用户故事	中	未开始	刘	刘			2021/12/30 14:58	2022/03/22 14:01	
#35	子工作项	中	未开始	刘	刘			2021/12/30 14:59	2021/12/30 14:59	
#32	美术需求	中	文案确认	刘	刘			2021/12/30 14:56	2021/12/30 14:56	
#31	用户故事	中	未开始	刘	刘			2021/12/30 14:50	2022/03/22 14:01	
#14	增加客服入口	中	处理中	刘	LI			2021/08/26 16:19	2022/03/22 14:01	
#17	客服系统页面开发	中	未开始	刘	LI			2021/08/26 16:20	2021/08/26 16:21	
#16	客服系统页面设计	中	未开始	刘	LI			2021/08/26 16:20	2021/08/26 16:20	
#15	客服系统入口规划	中	未开始	刘	LI			2021/08/26 16:20	2021/08/26 16:20	
#13	支持商户快捷回复用户评论+支持图片回复能力	中	未开始	刘	LI		2022年7月26日截止	2021/08/26 16:12	2022/07/11 14:47	
#12	第三方客服系统选型和评估	中	处理中	刘	LI			2021/08/26 16:11	2022/03/22 14:02	
#2	店铺 PV/UV 统计功能	中	处理中	刘	LI	Q4 - Sprint1	2021年9月24日截止	2021/08/26 16:09	2022/03/22 14:02	
#1	用户可分享直播链接到第三方平台	中	未开始	刘	LI	Q4 - Sprint1	2021年9月30日截止	2021/08/26 15:59	2022/01/06 10:20	

1/1 页 共 8 个事项 批量操作

Change the assignee to a specified member.

批量修改属性

包含不同类型的事项时，仅能修改相同的属性。

属性 *

处理人

修改为

不填值则会批量修改为空。

阿乔

确认修改 取消

The modifiable attributes are those set in the Project Collaboration scheme.

经典项目 经典模式

管理开发计划、需求和任务，用于基于时间或基于交付的项目。

应用方案



查看原方案 >

事项类型

需求

任务

缺陷

需求 系统

需求是指用户解决某一个问题或达到某一目标所需的软件功能。 | 可分解为

属性 workflow 描述模板

搜索属性...

创建页属性排序

属性名称	属性类型	默认值	描述
处理人 系统	单选成员	未指定	-
关注人 系统	多选成员	未指定	-
优先级 系统	单选菜单	中	-
开始日期 系统	日期选择	未指定	-
截止日期 系统	日期选择	未指定	-
标签 系统	多选菜单		-
进度 系统	小数输入	0%	-
预估工时 系统	小数输入	未预估	-
工时记录 系统	小数输入		-

Template Description

Last updated: 2024-09-05 16:23:38

This article provides a detailed introduction on how to use the description template feature in CODING Project Collaboration.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Application scenario

During project collaboration, filling out various types of items like requirements, tasks, or defects is a common task for most team members.

In general, certain specific documents such as **Product Requirement Documents** or **Defect Tickets** need to follow a fixed format. Deviating from this format is likely to result in loss of information, requiring repeated additions after submission. These specific documents often involve similar content, which can be tedious to fill out. **By using the description template feature, you can list some fixed-format content as templates. When filling them out, you only need to modify certain parts to complete the task.** This not only ensures that sufficient information is collected, saving the cost of repetitive input, but also standardizes and regulates the format and requirements for team requests/tasks, enhancing team collaboration efficiency. Coupled with [Definition item attribute capabilities](#), it optimizes the team's task collaboration experience.



Creating template

Project administrators click on **Project Settings** in the bottom left corner of the project, then select **Project Collaboration** options, and choose the type of task for which to add a description template. You can design differentiated description templates for different types of tasks to meet the team's content writing needs in various scenarios.



After clicking on the property, design commonly used description templates in **Description Templates** for task collaboration.

Application Templates

Once filled out and saved to drafts, click on **Apply Scheme** at the top right. The description template will become part of the **Feature Overview**, meaning that other projects applying this configuration scheme will also be able to use the description templates.

项目协同

协作配置

正在编辑配置方案 放弃编辑 **应用方案** 查看原方案 >

需求 系统

需求是指用户解决某一个问题或达到某一目标所需的软件功能。 | 可分解为

层级关系设置 移除

属性 workflow 描述模板

编辑描述模板内容

自动填充当前事项类型创建时的描述内容，对所有项目内成员可见，需应用配置方案后生效

需求背景

在此处简短的描述事项背景。

相关资料

- 1、提供附件，或 github pull 链接
- 2、（仅适用于新品文档）提供新品基本信息

需求类型

保存到草稿 放弃编辑

Once the new scheme takes effect, you can see the previously created item description template when creating requirements in project collaboration.

创建需求 1人关注中

输入事项标题 (按 + Enter 可快速创建)

需求背景
在此处简短的描述事项背景。

相关资料
1、提供附件, 或 github pull 链接
2、(仅适用于新品文档) 提供新品基本信息

需求类型

- 产品需求
- 用户需求
- 运营需求

附件 | 本地上传 | 其他方式
尚未添加附件

创建 取消 继续创建下一个

配置项:
处理人: 未指定
所属迭代: 未规划进迭代
优先级: 中
开始日期: 未指定
截止日期: 未指定
标签: +
进度: 0%
预估工时: 未预估

创建时间	更新时间
2022/06/30 16:58	2022/06/30 16:58

Configuration Plan Management Overview

Last updated: 2024-09-05 16:24:19

This article provides a detailed introduction to the Configuration Plan feature.

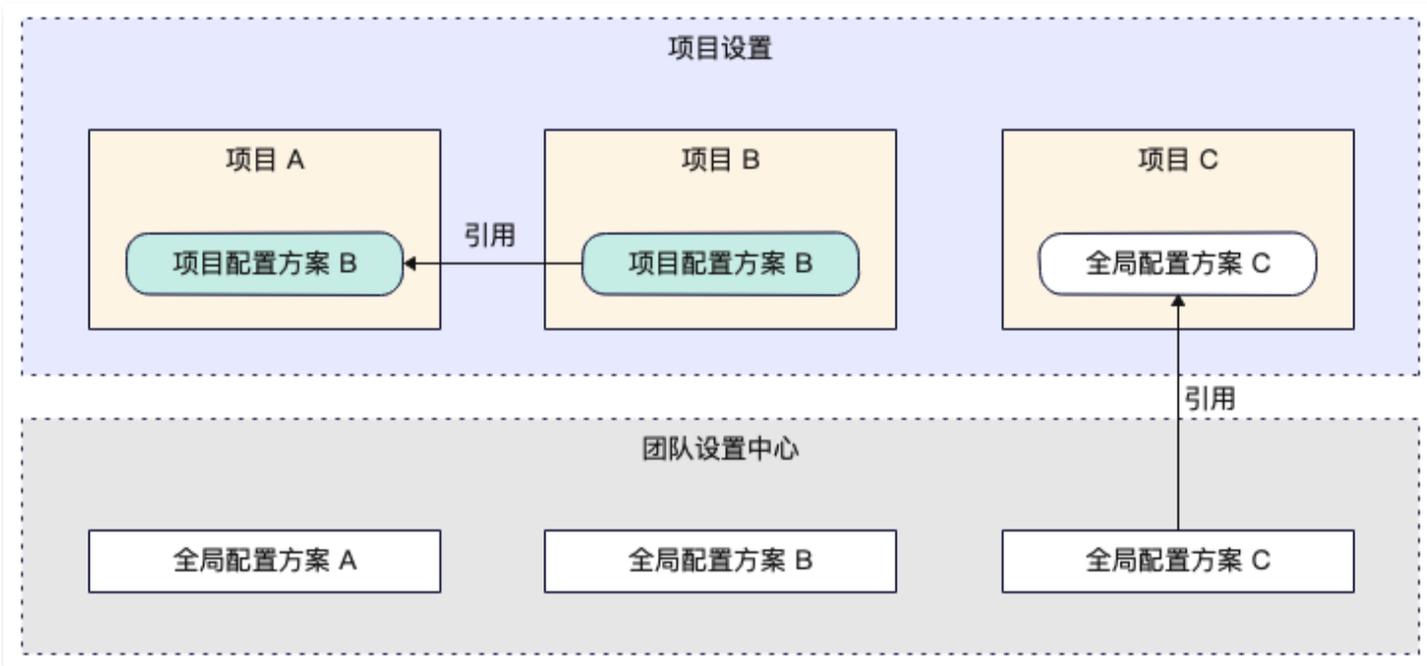
Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Items are the core units for team members to carry out efficient work. Different projects have different Workflow Pipelines. The **Configuration Plan** feature (hereinafter referred to as the Plan) enables quick reuse of pre-configured workflows and helps the team manage workflows uniformly.

Plan Types

Configuration schemes are divided into two types: **Global Configuration Scheme** and **Project Configuration Scheme** (hereinafter referred to as Global Scheme and Project Scheme). The Global Scheme needs to be created in the **Team Settings Center**, aimed at frequently used common configuration schemes within the team. The Project Scheme exists in various projects, positioned more flexibly, responding to the actual needs of the project for designed configuration schemes.



You can view and modify all Global Plans in the **Team Settings Center > Feature Settings > Project Collaboration > Configuration Plans**.

In **Project Settings**, you can preview or apply configuration plans used in other projects.



Configuring permission

Choose and adjust different Permission Schemes according to different configuration scenarios.

Global Plans

To access and modify Global Plans, the **Team Permission Group** must have the "Manage Configuration" permission.



Click the lower left corner to access the **Team Settings Center**, go to **Feature Settings>Configuration Scheme** to create or modify the Global Scheme.

Project Plans

To access and modify Project Plans, the **Project User Group** must have the "Project Collaboration Configuration" permission. Project administrators can refer to [Configure Project Member Permissions](#) to modify the relevant user group's permissions.

全局设置 / 项目权限方案 / 项目管理员的权限组设置

项目管理员的权限组设置 系统

基础权限设置

持续集成	<input checked="" type="checkbox"/> 删除构建记录	<input checked="" type="checkbox"/> 创建构建计划	<input checked="" type="checkbox"/> 修改构建计划	<input checked="" type="checkbox"/> 复制构建计划
	<input checked="" type="checkbox"/> 删除构建计划	<input checked="" type="checkbox"/> 禁用构建计划	<input checked="" type="checkbox"/> 启用构建计划	<input checked="" type="checkbox"/> 人工确认
	<input checked="" type="checkbox"/> 深复制构建计划			
持续部署	<input checked="" type="checkbox"/> 访问持续部署	<input checked="" type="checkbox"/> 持续部署管理	<input checked="" type="checkbox"/> 删除部署记录	
应用管理	<input checked="" type="checkbox"/> 访问应用管理	<input checked="" type="checkbox"/> 应用发布	<input checked="" type="checkbox"/> 应用编辑	<input checked="" type="checkbox"/> 数据库变更管理
制品库	<input checked="" type="checkbox"/> 访问制品库	<input checked="" type="checkbox"/> 制品库设置	<input checked="" type="checkbox"/> 删除制品仓库	<input checked="" type="checkbox"/> 制品扫描
	<input checked="" type="checkbox"/> 制品晋级	<input checked="" type="checkbox"/> 拉取制品	<input checked="" type="checkbox"/> 删除制品	<input checked="" type="checkbox"/> 推送制品
Wiki	<input checked="" type="checkbox"/> 访问 Wiki	<input checked="" type="checkbox"/> 编辑 Wiki	<input checked="" type="checkbox"/> 删除 Wiki	<input checked="" type="checkbox"/> 分享 Wiki
文件	<input checked="" type="checkbox"/> 访问文件	<input checked="" type="checkbox"/> 编辑文件	<input checked="" type="checkbox"/> 删除文件	<input checked="" type="checkbox"/> 分享文件
API 文档	<input checked="" type="checkbox"/> 访问 API 文档			
知识管理	<input checked="" type="checkbox"/> 访问知识管理			
访问审计	<input checked="" type="checkbox"/> 敏感标记			
设置	<input checked="" type="checkbox"/> 编辑项目基本信息	<input checked="" type="checkbox"/> 成员管理	<input checked="" type="checkbox"/> 成员权限配置	<input checked="" type="checkbox"/> 项目公告管理
	<input checked="" type="checkbox"/> 分类标签管理	<input checked="" type="checkbox"/> 团队筛选器配置	<input checked="" type="checkbox"/> 模块管理	<input checked="" type="checkbox"/> 项目协同配置
	<input checked="" type="checkbox"/> 关联仓库管理	<input checked="" type="checkbox"/> Service Hook	<input checked="" type="checkbox"/> 项目令牌	<input checked="" type="checkbox"/> 凭据管理
	<input checked="" type="checkbox"/> 项目通知配置	<input checked="" type="checkbox"/> 菜单管理		

After confirming you have the permissions, click the lower left corner on **Project Settings**, enter the **Project Collaboration** feature in Collaborative Configuration to make modifications.

项目协同测试

- 项目设置
- 项目与成员
- 项目协同
- 项目公告
- 开发者选项

项目协同

- 协作配置
- 关联仓库 beta
- 模块设置
- 集成配置

协作配置

管理事项类型与协作类型

应用其他配置方案 ...

事项类型 +

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	🗑️ ⚙️ ...
任务	任务是指为实现某个目标或需求所进行的具体活动。	🗑️ ⚙️ ...
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	🗑️ ⚙️ ...
子工作项	在敏捷模式下，将一个事项拆分成更小的块。	🗑️ ⚙️ ...
史诗	史诗是一个较大的功能或特性，可以分解为多个较小的需求或任务，通常其需要分多次迭代才可完成。	🗑️ ⚙️ ...
用户故事	用户故事是敏捷框架中最小的工作单元，是从用户角度描述软件如何为其带来特定的价值。	🗑️ ⚙️ ...
设计需求 <small>自定义需求</small>	设计组专用	🗑️ ⚙️ ...
美术需求 <small>自定义需求</small>	美术组专用	🗑️ ⚙️ ...

协作类型

Scrum 敏捷项目管理

管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队

更改协作类型

敏捷特性

故事点

故事点是某项工作相对于其他工作的“规模”估算。例如，规模为10点的工作预计比5点的工作多花费一倍时间。

开启后，事务、迭代中将展示故事点属性。 [了解更多](#)

故事点估算方式

改良斐波那契序列 [更改](#)

Managing configuration schemes

Last updated: 2024-09-05 16:24:40

This article provides a detailed introduction on how to manage configuration schemes.

Open Project

1. Log in to [CODING Console](#), click **Go to Team** to enter the CODING page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Creating a configuration scheme

Project Plans

When initializing project collaboration, three modes are provided: **Scrum Agile Management**, **Classic Project Management**, and **Selecting from Existing Plans**. The first two essentially apply system-provided plans directly, allowing you to customize a collaboration model that meets your project needs. The latter allows you to choose a pre-configured plan from the global or project plans.

配置并开启项目协同

项目协同功能用于管理项目信息，包括需求的创建、任务的分解、状态流转、跟踪进度等。你选择团队使用的项目协同方式并点击应用配置 | [了解如何选择协作模式](#)



Scrum 敏捷管理

管理需求、规划并跟进迭代，适用于定期迭代并交付的团队

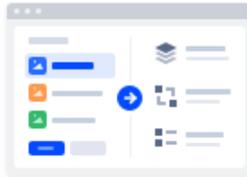
应用



经典项目管理

管理开发计划、需求和任务，用于基于时间或基于交付的项目

应用



从现有方案选择

重用已有的配置方案或选择其他项目所配置的方案

浏览方案

To create a project plan, there are **Copy** and **Synchronization** methods.

- Copying a plan means that after copying the target plan to the project, the current project plan is independent of the target plan. Any changes to the target plan in the future will not

be synchronized to the current project.



- Synchronizing a scheme means the selected target scheme is pulled into the project, establishing a master-slave relationship. Any changes made to the target scheme will automatically synchronize with the current project.



If you want to re-edit the current project configuration scheme or prevent the current project scheme from being overwritten by updates to the target scheme, please choose **Unsyncronize** in the **Project Settings**.

项目协同

协作配置

计划页

模块设置

集成配置

协作配置 同步配置方案: 通用运营配置方案 ...

管理事项类型与协作类型

事项类型

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	
任务	任务是指为实现某个目标或需求所进行的具体活动。	
缺陷	缺陷是指软件不符合最初定义的业务需求的现象, 缺陷管理用于跟踪这些问题和错误。	

协作类型

经典项目管理

管理开发计划、需求和任务, 用于基于时间或基于交付的项目

解除同步

应用其他方案

Global Plans

Click the **Team Settings Center** at the bottom left, then click **Feature Settings > Project Collaboration > Configuration Plan**.

团队设置中心 Q 搜索设置项

◎ 全局设置 **功能设置** ◎ 生态能力

项目协同 ^

团队级项目协同配置

配置方案

事项类型

事项属性

事项状态

时间设置

代码扫描 ^

团队代码扫描工具管理

工具规则

方案模板

持续集成 ^

团队级持续构建配置

构建节点池

构建计划模板

构建插件

质量门禁

应用中心 ^

团队级应用中心配置

服务模板

运维插件

通知渠道

Click the **Create Configuration Scheme** button in the top right to create a new scheme.

配置方案

项目协同配置方案包含协作类型和事项类型组合配置。可应用于多个项目中，方便统一管理团队的项目协作方式和 workflow

全部 敏捷模式 经典模式 搜索...

+ 创建配置方案

名称	模式	项目关联中
经典项目 (系统)	敏捷模式	0 项目关联中
敏捷项目 (系统)	敏捷模式	0 项目关联中
xxx	敏捷模式	0 项目关联中
11123	敏捷模式	0 项目关联中
新方案	敏捷模式	1 项目关联中
22223	敏捷模式	0 项目关联中
2222	敏捷模式	0 项目关联中
Henry	敏捷模式	0 项目关联中
热腾腾天	敏捷模式	1 项目关联中
111	敏捷模式	0 项目关联中
joel-md-g	敏捷模式	0 项目关联中
lx	敏捷模式	0 项目关联中

Editing a configuration scheme

A configuration scheme consists of **Collaboration Mode**, **Item Types**, **Item Attributes**, **Workflow**, and **Description Template**. Editing a configuration scheme essentially means adjusting these five units. Project administrators can make adjustments based on actual collaboration needs.

项目协同设置 / 事项类型

需求 (系统)

需求是指用户解决某一个问题的或达到某一目标所需的软件功能。

删除

属性 工作流 描述模板

搜索属性... 属性

创建页属性排序 + 添加属性

属性名称	属性类型	描述	默认值	是否必填	在创建页显示	操作
处理人 (系统)	单选成员	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
关注人 (系统)	多选成员	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
以上属性不可排序						
优先级 (系统)	单选菜单	-	中	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
截止日期 (系统)	日期选择	-	未指定	<input type="checkbox"/>	<input type="checkbox"/>	
标签 (系统)	多选菜单	-		<input type="checkbox"/>	<input type="checkbox"/>	
测试全局属性	单选菜单	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	🔗 🗑️
ABC	单选菜单	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	🔗 🗑️

Collaboration mode

Selecting the appropriate collaboration mode is fundamental to editing a configuration scheme. Different collaboration modes determine the team's collaboration style and the workflow of items. Administrators can refer to [Choosing the Appropriate Collaboration Mode](#) to understand the differences between the modes and select the one that fits the team's collaborative habits.

协作类型

Scrum 敏捷项目管理 了解详情

管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队

经典项目管理 了解详情

管理开发计划、需求和任务，用于基于时间或基于交付的项目

Item types

Common items like requirements, tasks, and defects in project collaboration can be abstracted into **Item Types**. Administrators can add or delete item types in the configuration scheme. For detailed instructions, please refer to [Defining Item Types](#).

The screenshot displays a project management interface. At the top, there are navigation tabs: '待规划' (To Plan), '迭代' (Iteration), '全部事项' (All Items), '史诗' (Epic), '需求' (Requirement), '任务' (Task), and '缺陷' (Defect). The '需求' (Requirement) tab is highlighted with a red box. Below the tabs, there are filters for '所属史诗' (Parent Epic), '类型' (Type), and '处理人' (Assignee), along with a search bar and a '双栏显示' (Two-column view) toggle. The main content area is split into two columns. The left column shows a 'Backlog' with 20 items, including 'Entry scheme interface development' (#87), 'Q3 User Conversion Rate Reporting Guidelines' (#75), 'Invite members' (#5), 'Invite members to the team by email' (#9), and 'Add a pop-up window to invite members by mail...' (#11). The right column shows a Kanban board with 3 items in the 'gogogo' column, including 'Entry scheme use discussion' (#85), 'User portrait analysis of invited members' (#74), and 'Customer Service Response Portal Development' (#84). A 'Third Group' column is also visible with 0 items. A '创建迭代' (Create Iteration) button is located at the bottom right of the Kanban board.

Issue Fields

Issue fields can be understood as the descriptive information of an issue, used to quickly specify its current status, expiration date, handler, priority, etc. Typically, different issue types correspond to different descriptions. Administrators can refer to [Custom Definition Issue Fields](#) to learn how to modify fields in the configuration plan.

The screenshot displays the issue management interface. The main table lists issues with the following columns: ID, Title, Priority, Status, Handler, and Creator. A red box highlights these columns. On the right, the 'Table Display Settings' (表格显示设置) panel is open, showing a list of fields with toggle switches. A red box highlights the following fields: Priority, Status, Handler, Creator, Iteration, Expiration Date, Creation Time, Update Time, Requirement Type, Tag, and Follower. All these fields are currently turned on.

Workflow

Workflow refers to the transition of all issues (epic, user story, requirements, task, defect, sub-task). For example, changing **To Do > In Progress > Done to Requirement Research > Requirement Review > Product Design > Product Development > Feature Acceptance** workflow. During this process, automated steps can also be configured. For instance, when an issue transitions to **Product Development**, the task can be automatically assigned to a specific team member.

Through custom definition workflows, not only can different teams' unique needs be met, but also uniform issue transition rules and methods can be configured. For detailed instructions,

refer to [Custom Definition Workflow](#).

项目协同

事项类型

敏捷特性

协作模式

模块设置

集成配置

← 事项类型 / 任务

任务 系统

任务是指为实现某个目标或需求所进行的具体活动。

属性 **workflow** 研发规范 beta

表格视图
列表视图
添加状态
创建步骤
配置规则

	结束状态		
开始状态	未开始	处理中	已完成
未开始		接受处理 <small>未设置规则</small>	处理完成 <small>未设置规则</small>
处理中	暂不处理 <small>未设置规则</small>		处理完成 <small>未设置规则</small>
已完成	重新打开 <small>未设置规则</small>	继续处理 <small>未设置规则</small>	
任何状态	+	+	+

应用配置

Template Description

Through the feature of description templates, fixed-format content can be listed as a template, and you only need to modify part of the content when filling it out. This ensures sufficient information is provided, standardizes team members' work habits, saves the cost of repetitive entries, and improves team collaboration efficiency.

For detailed instructions, refer to [Description Template](#).



Application Configuration Plan

Once the configuration plan editing is completed, the application configuration plan process begins. The system will gradually validate the changes in issue types and properties until there are no unresolved conflicts between the old and new plans, at which point the new configuration plan will be formally applied. For detailed instructions, see [Application Configuration Plan](#).

Export to Global Configuration Plan

Project plans can be exported as global plans, provided the plan is in an independent state, meaning changes to the project plan will not affect other projects. Confirm it is correct, then go to the project settings page and click **Export Scheme to Global** to complete the export.

协作配置 关联仓库 BETA 模块设置 集成配置

协作配置

管理事项类型与协作类型

应用团队配置方案 ...

导出方案到全局

事项类型 +

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	   
任务	任务是指为实现某个目标或需求所进行的具体活动。	   
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	   
用户故事	用户故事是敏捷框架中最小的工作单元，是从用户角度描述软件如何为其带来特定的价值。	   
子工作项	在敏捷模式下，将一个事项拆分成更小的块。	  

协作类型

Scrum 敏捷项目管理

管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队

更改协作类型

敏捷特性



故事点

故事点是某项工作相对于其他工作的“规模”估算。例如，规模为10点的工作预计比5点的工作多花费一倍时间。开启后，事务、迭代中将展示故事点属性。[了解更多](#)

故事点估算方式

 改良斐波那契序列 [更改](#)

Switch Configuration Plan

If you wish to change the currently used plan to another configuration plan, go to **Project Settings > Collaboration Configuration** and click **Apply Other Configuration Schemes**.

协作配置 关联仓库 BETA 模块设置 集成配置

协作配置

管理事项类型与协作类型 应用团队配置方案 ...

事项类型 +

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	
任务	任务是指为实现某个目标或需求所进行的具体活动。	
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	
用户故事	用户故事是敏捷框架中最小的工作单元，是从用户角度描述软件如何为其带来特定的价值。	
子工作项	在敏捷模式下，将一个事项拆分成更小的块。	

协作类型

Scrum 敏捷项目管理 更改协作类型
管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队

敏捷特性

故事点
故事点是某项工作相对于其他工作的“规模”估算。例如，规模为10点的工作预计比5点的工作多花费一倍时间。
开启后，事务、迭代中将展示故事点属性。[了解更多](#) 🔵

After confirming the plan, the application configuration plan process begins. For detailed steps, refer to [Application Configuration Plan](#).

Delete Configuration Plan

To delete a configuration plan, go to the **Team Settings Center**. A member with the appropriate permissions can click **Delete** at the bottom right of the plan card. Once deleted, the data cannot be recovered. If the plan has been associated with other projects, it cannot be deleted until the projects using the plan have been switched to another configuration plan.

配置方案

项目协同配置方案包含协作类型和事项类型组合配置。可应用于多个项目中，方便统一管理团队的项目协作方式和工作流

全部 敏捷模式 经典模式 + 创建配置方案

经典项目 <small>系统</small> 管理开发计划、需求和任务，用于基于时间或基于交付的项目 经典模式 0 项目关联中	敏捷项目 <small>系统</small> 管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队 敏捷模式 0 项目关联中	通用运营配置方案 经典模式 0 项目关联中	withdrawal 这个是全局配置方案的描述信息。 敏捷模式 0 项目关联中	Drive 管理需求池、规划并跟进迭代，适用于定期迭代并交付的团队。 敏捷模式 0 项目关联中
3.26-3测试全局方案 经典模式 1 项目关联中	3.26.7 敏捷模式 0 项目关联中	3.26.6 敏捷模式 1 项目关联中	3.26.5 敏捷模式 1 项目关联中	3.26-2配置方案 经典模式 1 项目关联中

复制为新方案
修改基本信息
删除

Application Configuration Plan

Last updated: 2024-09-05 16:24:55

This article provides a detailed introduction on how to apply the configuration plan.

Open Project

1. Log in to [CODING Console](#), click **Go to Team** to enter the CODING page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Modifying the current project plan or preparing to apply another configuration plan will initiate the migration check process. During this process, the system will gradually verify item types, item statuses, item attributes, and hierarchical relationships until there are no unresolved conflict differences between the new and old plans. After confirmation, the new configuration plan will be officially enabled in the project.

Operation step

Step 1: Check Item Types

This step will check and confirm the corresponding relationships between the item types in the old and new plans. If an item type is removed in the new plan, items that belonged to that type will also be **Deleted** after migration.

事项迁移

1 事项类型 2 事项状态 3 事项属性 4 层级关系 5 确认迁移

迁移项目（*yizhanshijierupingtaizhonggou*）中的以下事项。

原事项类型	→	目标事项类型
🏰 史诗		💡 需求
☰ 反馈单		💡 需求
📦 特性		📄 用户故事
🔄 自定义任务		☰ 任务
💧 自定义需求1		请选择
💧 自定义需求2		📄 用户故事
💧 自定义需求4		💡 需求
! 安全漏洞		删除 将删除该事项类型的所有数据，请谨慎操作

下一步

Step 2: Migrate Item Statuses

This step will check the item statuses. You can compare and specify the corresponding relationships between the item statuses in the old and new plans during this process.

事项迁移
✕

✓ 事项类型
2 事项状态
3 事项属性
4 层级关系
5 确认迁移

以下事项状态在目标事项不存在，请选择要变更的状态。

🔔 需求 → 🔔 需求

原事项状态	→ 目标事项状态
测试状态2...	开发中
已发布	已完成
已取消	已完成
处理中	测试中

以下事项状态在目标事项不存在，请选择要变更的状态。

☰ 任务 → ☰ 任务

原事项状态	→ 目标事项状态
测试状态03	请选择
测试状态2...	请选择
已取消	请选择
待验证	请选择

以下事项状态在目标事项不存在，请选择要变更的状态。

Step 3: Migrate Item Attributes

This step will check and compare the corresponding relationships between the attributes in the old and new plans. You can migrate the relationships between attributes in this step. If there are same menu attributes but different option values in the new and old plans, you will need to set the corresponding relationships between the attributes in the new and old plans. If an item attribute from the old plan does not exist in the new plan, it will be automatically deleted.

事项迁移
✕

✓ 事项类型
✓ 事项状态
3 事项属性
4 层级关系
5 确认迁移

🔔 需求 → 🔔 需求

以下目标事项中不存在的属性会被删除，仅保留相同属性。?

多行文本输入

ABC

测试全局属性

上一步
下一步

Step 4: Check Hierarchical Relationships

This step will check the [Hierarchical Relationships](#) between items. If there are differences in the hierarchical relationships between the old and new plans, item types under the decomposed hierarchy will become first-level item types.

事项迁移

✓ 事项类型 ———— ✓ 事项状态 ———— ✓ 事项属性 ———— 4 层级关系 ———— 5 确认迁移

部分事项存在子事项，且层级关系不能保留，将会变为独立事项。

原事项类型	将事项迁移为
子工作项	任务

上一步 下一步

Step 5: Verify and Confirm

This is the final confirmation step. You need to enter the account password of the current log in user. After verification, the data conversion task will be executed. During this process, the collaborative feature of the current project will not be available.

事项迁移

✓ 事项类型 ———— ✓ 事项状态 ———— ✓ 事项属性 ———— 4 层级关系 ———— 5 确认迁移

部分事项存在子事项，且层级关系不能保留，将会变为独立事项。

原事项类型	将事项迁移为
子工作项	任务

上一步 下一步

Custom Issue Types

Last updated: 2024-09-05 16:25:13

This document describes how to configure custom issue types in CODING Project Management.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

The item type is the main entity in project collaboration, for example, both requirements and tasks can be abstracted as **item type**. You can add item types such as **operations**, modify the type icon, and define its [properties](#) and [workflows](#) in the project. Item types are divided by scenario into team-level types and project-level types; defining team-level item types first is required before applying them effectively within projects.

Team-level Issue Types

Team administrators click on the **team settings center** at the bottom left, select **feature settings > project collaboration > item types** to enter the team-level item type list.

The team-level issue type list displays all issue types in the team, categorized as built-in system types and custom types. System types cannot be modified (e.g., Epic, Requirement, Task, Defect, User Story, and Work Items). User Story is a new built-in type. As the smallest unit of work in an agile framework, it describes the value brought by software to users.

User Stories are newly added system-built types, which are the smallest work units in Agile frameworks, aiming to describe from a user's perspective how the software brings specific value.

项目协同

配置方案

事项类型

事项属性

事项状态

事项类型

事项类型可被添加到项目中，全局事项类型修改后不影响项目内事项类型

+ 创建事项类型

事项类型名称	描述	关联项目(集)数	操作
史诗 系统	史诗是一个较大的功能或特性，可以分解为多个较小的需求或任务。通常其需要分多次迭代才可完成。	8	🗑️ 🔗
用户故事 系统	用户故事是敏捷框架中最小的工作单元，是从用户角度描述软件如何为其带来特定的价值。	49	🗑️ 🔗
需求 系统	需求是指用户解决某一个问或达到某一目标所需的软件功能。	13	🗑️ 🔗 ⋮
任务 系统	任务是指为实现某个目标或需求所进行的具体活动。	55	🗑️ 🔗 ⋮
缺陷 系统	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	55	🗑️ 🔗
子工作项 系统	在敏捷模式下，将一个事项拆分成更小的块。	41	🗑️ 🔗
风险 系统	风险是可能导致项目损失的不确定性，使用风险类型记录并处理风险。	11	🗑️ 🔗
工作项 系统	工作项表示在项目集中需要完成的需求或任务。	11	🗑️ 🔗
自定义需求 自定义需求	-	4	🗑️ 🔗 ⋮
测试活动 自定义任务	-	2	🗑️ 🔗 ⋮
自定义任务 自定义任务	-	9	🗑️ 🔗 ⋮

When creating a custom issue type, you can select an icon for it, and add a description. The custom issue type can be copied, and a replica of it is created automatically. Custom requirements and custom tasks can be created for custom issue types, which can be manually deleted when they are disassociated with the project.

+ 添加事项类型

选择事项类型

🔍 **自定义需求**

需求是指用户解决某一个问或达到某一目标所需的软件功能。
在经典模式下，需求支持分解成子需求和任务。

🔍 **自定义任务**

任务是指为实现某个目标或需求所进行的具体活动

[了解如何创建自定义事项类型](#)

添加事项类型 | 自定义需求

名称

选择类型图标

描述

确定

取消

Project-level Issue Type

Add the set team-level item types under **project settings > project collaboration**.



In Agile mode, sub-work item types will be automatically introduced; in Classic mode, you cannot use epics and sub-work item types.



Under Agile mode, the feature to enable estimated work hours cannot be turned on, as the Agile concept itself uses **story points** for workload estimation. Work hour logging can only be enabled in classic mode.

项目协同

协作配置

应用其他配置方案 ...

需求 系统

需求是指用户解决某一个问题的或达到某一目标所需的软件功能。 | 可分解为

层级关系设置 移除

属性 workflow

搜索属性...

创建页排序 + 添加属性

属性名称	描述	默认值	是否必填	在创建页显示	操作
处理人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
关注人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
以上属性不可排序					
优先级 系统	-	中	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
开始日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
截止日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
标签 系统	-	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
进度 系统	-	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
预估工时 系统	-	未预估	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
工时记录 系统	-		<input type="checkbox"/>	<input type="checkbox"/>	

Issue Type Configuration

You can set hierarchy levels, fields, and workflows for issue types.

Hierarchy levels

Under the classic collaboration mode, **User Stories**, **requirements**, and **custom-defined requirements** three types of items support setting hierarchical relationships.

需求 系统

需求是指用户解决某个问题或达到某一目标所需的软件功能。 | 可分解为

层级关系设置 移除

属性 workflows

搜索属性...

创建页属性排序 添加属性

属性名称	属性类型	描述	默认值	是否必填	在创建页显示	操作
处理人	系统	单选成员	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>
关注人	系统	多选成员	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>
以上属性不可排序						
:: 优先级	系统	单选菜单	-	中	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
:: 开始日期	系统	日期选择	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>
:: 截止日期	系统	日期选择	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>
:: 标签	系统	多选菜单	-	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>
:: 进度	系统	小数输入	-	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>
:: 预估工时	系统	小数输入	-	未预估	<input type="checkbox"/>	<input checked="" type="checkbox"/>
:: 工时记录	系统	小数输入	-		<input type="checkbox"/>	<input type="checkbox"/>

After defining hierarchy levels, multiple predefined issue types are available when you break down requirements, flexibly meeting team workflows.

计划 迭代 | 全部事项 需求 任务 缺陷

全部打开的

事项类型 全部 状态类型 未开始, 进行中 处理人 全部 + 筛选

ID	标题
#1	测试需求

测试需求

编辑描述 上传附件 分解需求 分解任务 关联缺陷 ...

这是一个新的测试需求

测试分解事项。

子需求 | +

输入标题快速创建需求 创建 取消

子需求

活动日志 工时日志

全部 只看日志 只看评论

+ coding 创建了 需求 2022-04-01 11:38

状态 未开始

处理人 coding

所属需求 未关联需求

迭代 未规划进迭代

优先级 * 中

开始日期 未指定

截止日期 未指定

标签 +

Configure Fields

Properties can be understood as an item's **description information**, used to quickly explain the current status of the item, deadlines, handlers, priority, etc. Adding properties will be displayed on the detail page when creating an item, and can also be used as units in the search box and filter bar.

For more details, see [custom-defined item properties](#).

项目协同
协作配置
正在编辑配置方案
放弃编辑
应用方案
查看原方案 >

反馈单 自定义需求
层级关系设置
移除

可分解为 🔗 📁 🔗

属性 workflow

创建页排序
+ 添加属性

属性名称	描述	默认值	是否必填	在创建页显示	操作
处理人 <small>系统</small>	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
关注人 <small>系统</small>	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
以上属性不可排序					
优先级 <small>系统</small>	-	中	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
开始日期 <small>系统</small>	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
截止日期 <small>系统</small>	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
标签 <small>系统</small>	-	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
完成时间 <small>系统</small>	-		<input type="checkbox"/>	<input checked="" type="checkbox"/>	
进度 <small>系统</small>	-	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
预估工时 <small>系统</small>	-	未预估	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
工时记录 <small>系统</small>	-		<input type="checkbox"/>	<input type="checkbox"/>	

Configure workflow

By configuring workflows, the item's transition status can be adjusted to meet different teams' unique needs. Moreover, it can achieve consistency in status definition across teams, enhancing the efficiency of cross-project and inter-departmental collaboration. For more information, please see [custom-defined workflows](#).

项目协同

- 项目设置
- 项目与成员
- 项目协同
- 项目公告
- 开发者选项

项目协同

- 协作配置
- 计划页
- 关联仓库 beta
- 模块设置
- 集成配置

协作配置

应用其他配置方案

需求 系统
需求是指用户解决某一个问题或达到某一目标所需的软件功能。 | 可分解为

属性 workflow 描述模板

表格视图 列表视图 添加状态 创建步骤 配置规则

结束状态	未开始	开发中	测试中	已完成
未开始		+	+	+
开发中	+		+	+
测试中	+	+		+
已完成	+	+	+	

任何状态

未开始	开发中	测试中	已完成
未设置规则	未设置规则	未设置规则	未设置规则

Custom Issue Fields

Last updated: 2024-09-05 16:25:27

This document describes how to configure issue fields in the Definition configuration scheme.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

Fields can be understood as **descriptive information** of issues, used to quickly indicate their current status, due date, assignee, priority, and more.



This document explains how to define issue fields through **Team Field Settings** and **Project Field Configuration**. The steps are as follows:

1. First, set the team fields, then select fields from the existing ones according to the needs of the project.

2. After the configuration, the fields will be available for all the issues (such as epics, requirements, tasks, and bugs).

Team Field Settings

Since all issue type fields are determined by global field settings, only members with administrative privileges can modify or add custom fields. Click the bottom-left **Team Settings Center** and go to **Organization and Members > Permission Configuration > User Group** for details.

The screenshot shows the 'Team Settings Center' interface. On the left, there is a navigation menu with 'Organization and Members' selected. Under 'Organization and Members', 'Permission Configuration' is highlighted. The main content area shows the 'Team Settings' page for a specific user group. The 'Permission Configuration' tab is active, displaying a table of permissions for various actions. The 'Management Permissions' checkbox is highlighted with a red box.

操作对象	权限	全选
团队设置	<input checked="" type="checkbox"/> 查看页面 <input checked="" type="checkbox"/> 基础设置 <input type="checkbox"/> 高级设置	<input type="checkbox"/>
团队成员	<input checked="" type="checkbox"/> 查看页面 <input checked="" type="checkbox"/> 邀请成员 <input type="checkbox"/> 设置管理员 <input checked="" type="checkbox"/> 编辑成员 <input checked="" type="checkbox"/> 删除成员	<input type="checkbox"/>
权限配置	<input checked="" type="checkbox"/> 查看页面 <input checked="" type="checkbox"/> 管理权限	<input checked="" type="checkbox"/>
项目管理	<input checked="" type="checkbox"/> 查询全部项目 <input checked="" type="checkbox"/> 创建项目 <input checked="" type="checkbox"/> 编辑项目 <input checked="" type="checkbox"/> 归档 & 解归档项目 <input checked="" type="checkbox"/> 导入项目 <input checked="" type="checkbox"/> 删除项目	<input checked="" type="checkbox"/>
项目集管理	<input checked="" type="checkbox"/> 查询全部项目集 <input checked="" type="checkbox"/> 创建项目集 <input checked="" type="checkbox"/> 编辑项目集 <input checked="" type="checkbox"/> 归档 & 解归档项... <input checked="" type="checkbox"/> 删除项目集	<input checked="" type="checkbox"/>
项目协同设置	<input checked="" type="checkbox"/> 查看页面 <input checked="" type="checkbox"/> 管理配置	<input checked="" type="checkbox"/>

After confirming permissions, go to the Team Settings Center, select **Feature Settings > Project Collaboration > Issue Fields** to enter the field settings page.

The screenshot shows the 'Team Settings Center' interface. The 'Feature Settings' tab is selected and highlighted with a red box. The main content area displays a grid of feature settings cards. The 'Project Collaboration' card is expanded, showing the 'Issue Fields' option, which is highlighted with a red box.

功能设置
<p>项目协同 团队级项目协同配置</p> <p>事项类型 事项属性 事项状态</p>
<p>代码扫描 团队级代码扫描工具管理</p> <p>工具规则 方案模版</p>
<p>持续集成 团队级持续构建配置</p> <p>构建节点池 构建计划模版 构建插件</p>
<p>持续部署 团队级持续部署配置</p> <p>云账号 堡垒机 主机组</p>
<p>团队模版 团队级 Markdown 模版配置</p> <p>团队模版</p>
<p>公开资源 管理公开代码仓库与制品库</p> <p>公开资源</p>

Create field

Fields are divided into system fields and custom fields. Click **Create Field** in the upper-right corner of the issue field settings page and choose from various built-in field types according to project needs.



Enter a field name, description (optional), and one or more menu options to create a custom field. The name of a custom field cannot be the same as that of a system field. The following example is a custom single select field and how to use this field in the project is demonstrated in a later section.



Modify or delete field

At the end of any given Definition property, you can configure menu options, basic information, and delete operations within the **Operation** menu; before deleting a Definition property, please

ensure no projects are using it. System properties cannot be deleted.

项目协同设置

事项类型 事项属性 事项状态

属性可以用于定制对应事项类型的字段，项目中的各事项类型的属性需要从以下属性列表中选择。

搜索... + 创建属性

属性名称	属性类型	描述	操作
处理人 系统	单选成员	-	
缺陷类型 系统	单选菜单	-	⋮
优先级 系统	单选菜单	-	
开始日期 系统	日期选择	-	
截止日期 系统	日期选择	-	
模块 系统	单选菜单	-	
标签 系统	多选菜单	-	⋮
关注人 系统	多选成员	-	
需求类型 系统	单选菜单	-	⋮
预估工时 系统	小数输入	-	
进度 系统	小数输入	-	
工时记录 系统	小数输入	-	
一个新属性	单选菜单	-	⋮ ✎ 🗑️

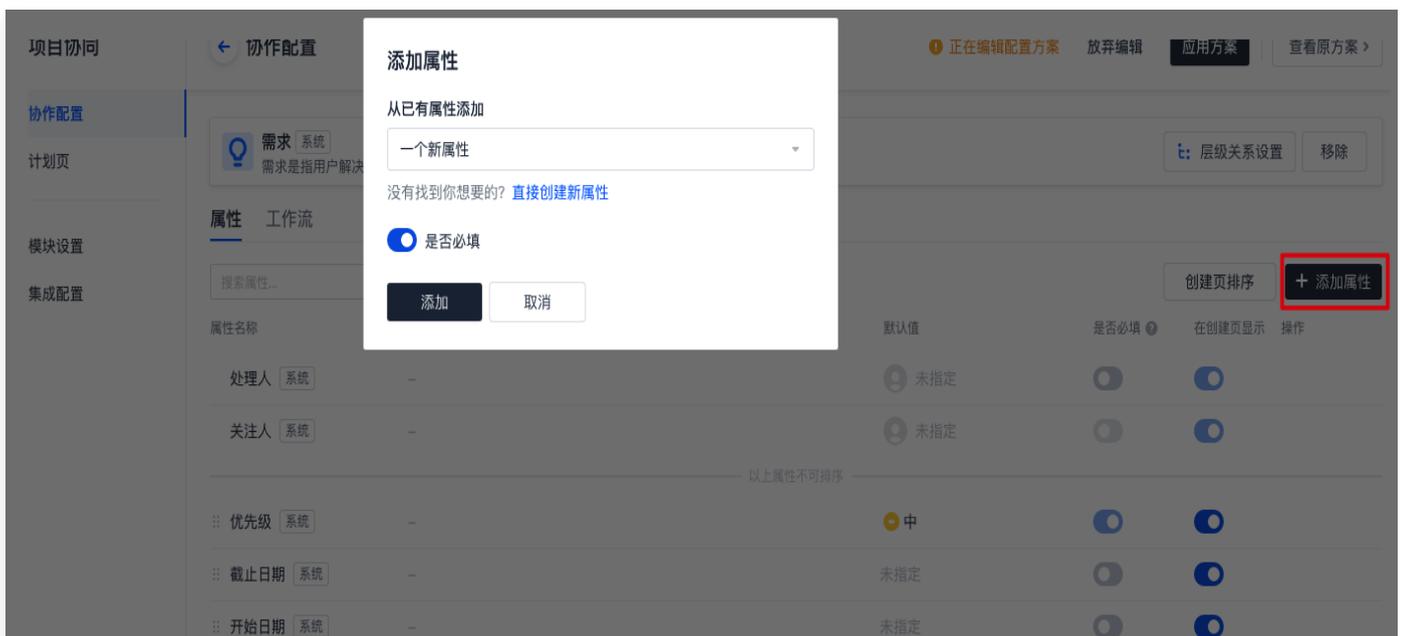
Project Field Configuration

Project field configuration only applies to a single project.

1. In a project, go to **Project Settings > Project Collaboration > Issue Types** from the menu on the left. Click **Fields** to the right of the issue to configure its fields.



2. In the field configuration page, click **+ Add Field** in the upper-right corner. From the **Add from Existing Fields** dropdown menu, add the single select field created earlier, and choose whether it is required. Confirm to **Add** it.



3. You can adjust the display priority of properties by dragging them up or down based on team and project needs, set default values, toggle the mandatory restriction on or off, and display them on the creation page. Furthermore, you can configure the property menu or delete properties in the **Operation** section.

项目协同

协作配置

正在编辑配置方案 放弃编辑 应用方案 查看原方案 >

需求 系统 需求是指用户解决某一个问题或达到某一目标所需的软件功能。 | 可分解为 ▲

层级关系设置 移除

属性 工作流

搜索属性...

创建页排序 + 添加属性

属性名称	描述	默认值	是否必填	在创建页显示	操作
处理人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
关注人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
以上属性不可排序					
截止日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
开始日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
标签 系统	-	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
进度 系统	-	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
预估工时 系统	-	未预估	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
工时记录 系统	-		<input type="checkbox"/>	<input type="checkbox"/>	

4. After confirming all property configuration actions, select the **Apply Scheme** at the top to take effect.

项目协同

协作配置

正在编辑配置方案 放弃编辑 应用方案 查看原方案 >

需求 系统 需求是指用户解决某一个问题或达到某一目标所需的软件功能。 | 可分解为 ▲

层级关系设置 移除

属性 工作流

搜索属性...

创建页排序 + 添加属性

属性名称	描述	默认值	是否必填	在创建页显示	操作
处理人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
关注人 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
以上属性不可排序					
优先级 系统	-	中	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
截止日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
开始日期 系统	-	未指定	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
标签 系统	-	+	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
进度 系统	-	0%	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
预估工时 系统	-	未预估	<input type="checkbox"/>	<input checked="" type="checkbox"/>	
工时记录 系统	-		<input type="checkbox"/>	<input type="checkbox"/>	

Use Project Fields

For example, when creating a new requirement within any project, the creation page will display the **New Property** added during the operations mentioned above.

The screenshot displays the '测试需求' (Test Requirement) page in the CODING DevOps system. The page features a header with the title and a navigation bar with buttons for '编辑描述', '上传附件', '分解需求', '分解任务', and '关联缺陷'. The main content area shows the requirement title and a description: '这是一个新的测试需求' and '测试分解事项。'. Below this, there are tabs for '活动日志' and '工时日志', and a filter for '全部'. A list of activities is shown, including '+ coding 创建了需求 2022-04-01 11:38'. A rich text editor is visible with a toolbar and a '发表' (Publish) button. On the right side, there is a sidebar with various fields: '状态' (未开始), '处理人' (coding), '所属需求' (未关联需求), '迭代' (未规划进迭代), '优先级' (中), '截止日期' (未指定), '开始日期' (未指定), '标签', '进度' (0%), '预估工时' (未预估), and '工时记录' (未记录工时). A dropdown menu is open, showing a search bar and a list of items, with 'newone' selected.

Custom workflow

Last updated: 2024-09-05 16:25:46

This document describes in detail how to configure a workflow in the Definition plan.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

Description of the Feature

As enterprise teams rapidly expand their business, they often face a variety of development models across numerous projects and diverse demands within a single project, making unified R&D management challenging.

With the Definition workflow feature, you can define the workflow statuses and steps for all issues (epics, user stories, requirements, tasks, bugs, sub-tasks) such as changing **Not Started > In Progress > Completed** to **Requirement Research > Requirement Review > Product Design > Product Development > Feature Acceptance** workflow. This meets the unique needs of different teams while configuring unified issue transition rules and methods.

Configuration Sample

This document introduces how to define a team-specific workflow through **Team Level Workflow Configuration** and **Project Level Workflow Configuration** modules with specific projects. The steps are as follows:

1. First, create team-level statuses, and then set the required workflow statuses for different issue types from the existing team-level statuses.
2. After completing the team-level workflow configuration, you can adjust the workflow transition rules for various issues (epics, user stories, requirements, tasks, bugs) within different projects based on the actual situation.

Team Level Workflow Configuration

Confirm Permissions

Since team-level status settings influence the issue statuses for the entire team, only members with **Administrative Privileges** in the user group can modify or add custom statuses. You can click the lower-left **Settings Center** and view details in **Organization and Members > Permissions Configuration > Permission Group**.

项目与成员

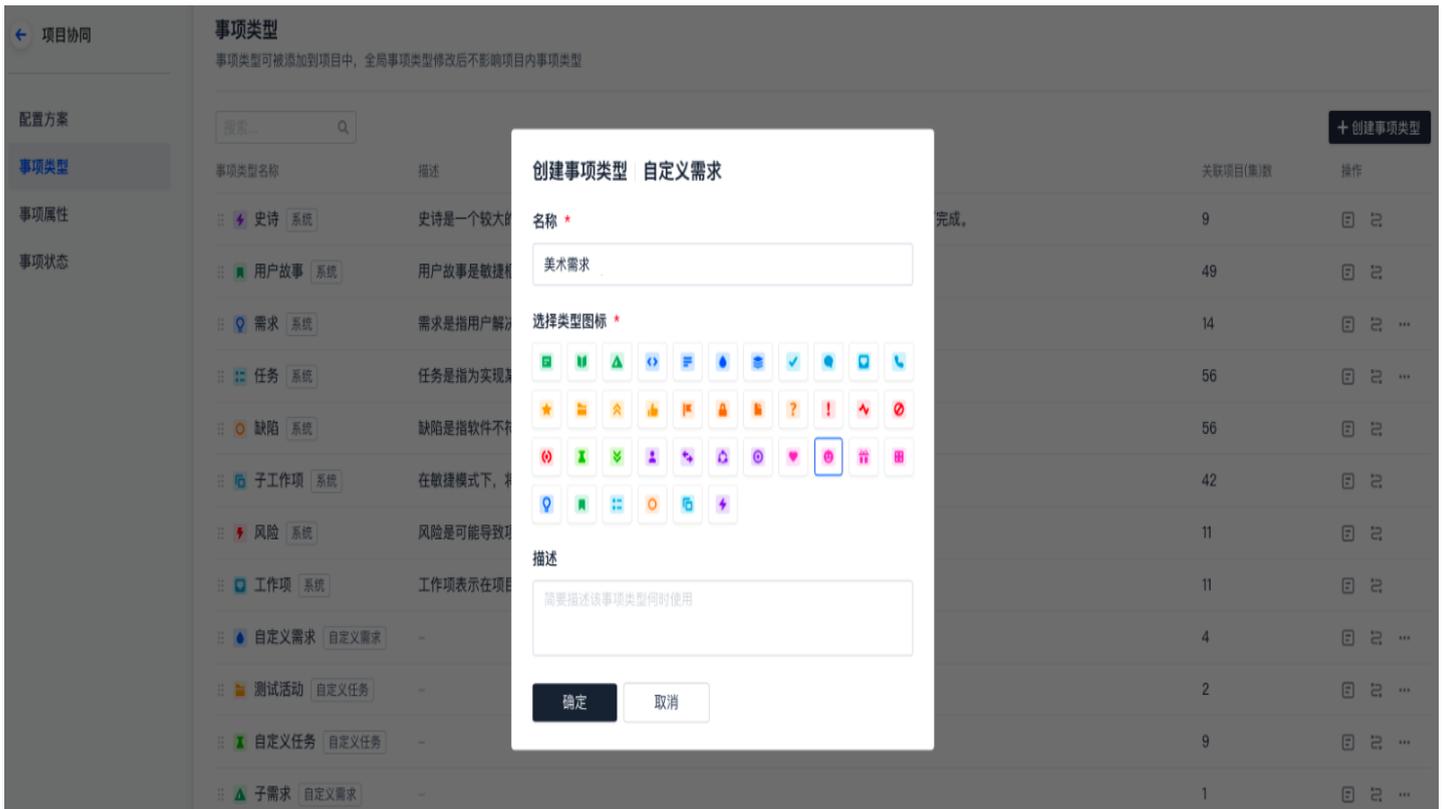
- 项目
- 基本设置
- 菜单管理
- 通知设置
- 成员配置
- 成员
- 权限组
- 个人偏好
- 每日工作邮件提醒
- 其他
- 分类标签

项目权限组 (16)

如需修改项目权限组，请联系团队管理员前往设置中心进行修改。

权限组名称	描述	成员数	操作
项目管理员 系	具备项目的所有管理权限。	2	查看权限
项目经理 系	具备项目协同、测试管理、代码仓库、持续集成、文件管理的访问与操作权限。	0	查看权限
开发 系	具备代码仓库、持续集成、制品仓库的访问与操作权限。	3	查看权限
测试 系	具备测试管理的访问与操作权限。	0	查看权限
产品 系	具备项目协同、文件管理的访问与操作权限。	0	查看权限
运维 系	具备持续集成、制品库、持续部署的访问与操作权限。	0	查看权限
默认配置 系	系统默认权限组，具备访问知识管理、文件等基本权限。	0	查看权限
123-3ee5a38	权限数据迁移，根据项目「scrum-xuexiangmu」下「123」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
开发-411762e	权限数据迁移，根据项目「coding-dianshangpingtai-mini222」下「开发」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
产品-4117631	权限数据迁移，根据项目「coding-dianshangpingtai-mini222」下「产品」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
testing-42db206	权限数据迁移，根据项目「coding-dianshangpingtai-mini222」下「testing」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
开发-425c539	权限数据迁移，根据项目「xiangmuji1-xiangmu2」下「开发」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
11111-4861c45	权限数据迁移，根据项目「chenxing」下「11111」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限
开发-48c6a17	权限数据迁移，根据项目「ceshildedagailan」下「开发」角色的权限创建的权限组，实际该权限组可能会被多个其它项目共同使用	0	查看权限

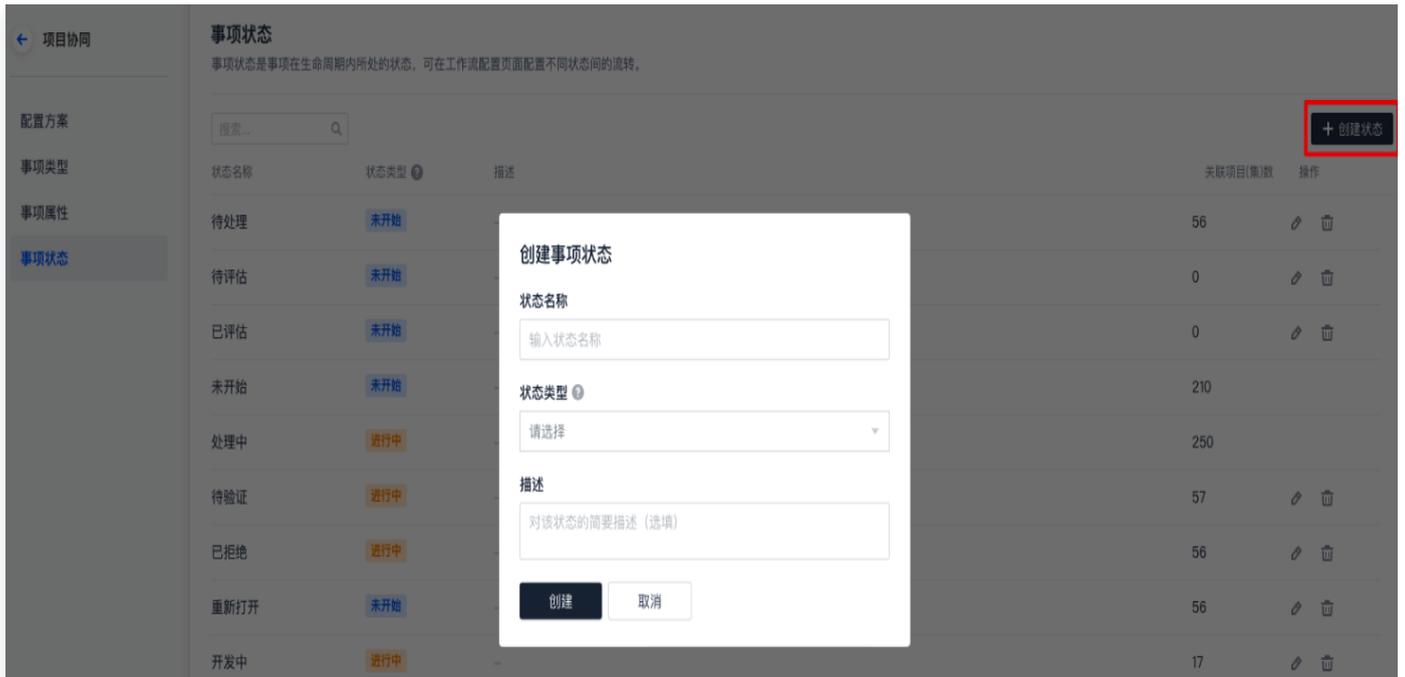
Taking art development projects in the gaming industry as an example, the workflow status generally covers **concept confirmation > UI design > concept art design > model design > animation and special effects design > delivery confirmation**. Project types are in strong demand within the team and the workflow has its uniqueness. Therefore, you can create a custom **Definition** for **art requirements** and then set a personalized workflow for this item type.



Set status

1. Click the lower-left **Settings Center**, select **Feature Settings > Project Collaboration > Issue Status** to enter the status setting page. By clicking **Create Status** in the upper-right corner, and filling in the status name, type, and optionally adding a description, you can create a custom status.

Add the states involved in the art development project workflow to the issue statuses, ensuring status names are unique.



2. Go to **Item Type**, in the **actions** for art requirements, select **workflow**.



3. In the workflow details page, select **Add Status** to add the involved statuses to the workflow. If the option **Any Status Can Transition to This Status** is enabled, it means all statuses within the project can transition to this target status. You can set the initial status on the vertical axis on the left side of the workflow or remove statuses from the workflow.

项目协同设置 / 事项类型

美术需求 自定义需求

属性 workflow

表格视图 列表视图 **添加状态**

结束状态 未开始

开始状态 未开始

未开始

处理中

已完成

任何状态 未开始 未设置规则 处理中 未设置规则 已完成 未设置规则

应用配置

添加美术需求状态

美术需求状态

请选择状态

- 文案确认
- UI 设计
- 原画设计
- 模型设计
- 动画特效设计
- 确认交付

层级关系设置 编辑基本信息 删除

← 项目协同设置 / 事项类型

😊 美术需求 自定义需求

属性 workflow

表格视图 列表视图 添加状态 创建步骤 配置规则

结束状态	未开始	处理中	已完成	文案确认	UI 设计
开始状态					
未开始	+	+	+	+	+
移除	+	+	+	+	+
已完成	+	+	+	+	+
文案确认	+	+	+	+	+
UI 设计	+	+	+	+	+
原画设计	+	+	+	+	+
模型设计	+	+	+	+	+

应用配置 取消修改 当前配置尚未生效，点击应用配置后生效。

Modify or delete status

In the operations menu at the end of any status on the status settings page, you can edit or delete a status.

事项状态是事项在生命周期内所处的状态。可在 workflow 配置页面配置不同状态间的流转。

+ 创建状态

状态名称	状态类型	描述	关联项目数	操作
已拒绝	进行中	-	17	
重新打开	未开始	-	17	
开发中	进行中	-	14	
测试中	进行中	-	14	
已发布	已完成	-	0	
已关闭	已完成	-	17	
已完成	已完成	-	17	
新状态	进行中	这是一个新状态	1	
文案确认	未开始	-	0	
UI 设计	进行中	-	0	
原画设计	进行中	-	0	
模型设计	进行中	-	0	
动画特效设计	进行中	-	0	
确认交付	已完成	-	0	

Set steps

A transition shows the transition process from an initial status to a target status.

1. On the art requirements workflow detail page, select **Create Step**.



2. You can specify the **start status** and **target status** for this step. The step name defaults to the target status but can also be modified. Once confirmed, you can **create**.

For example, if only original artwork is needed after confirming the copy, you can set the start and target statuses as **Copy Confirmed** > **Original Art Design**, and name it **Create Original Art Only** to complete the creation.

创建美术需求步骤

开始状态 → 目标状态

文案确认 → 原画设计

步骤名称

仅制作原画

创建 取消

- You can also directly create transition steps in **any status** column, where the **start status** and **target status** are fixed by the table's horizontal and vertical alignment of the states, and only the **step name** can be modified.

← 项目协同设置 / 事项类型

📄 美术需求 自定义需求

属性 工作流

表格视图 列表视图 ➕ 添加状态 📄 创建步骤 ⚙️ 配置规则

结束状态	文案确认	UI 设计	原画设计	模型设计	动画特效设计	确认交付
开始状态						
文案确认		+	仅制作原画 未设置规则	+	+	+
UI 设计	+		+	+	+	+
原画设计	+	+		+	+	+
模型设计	+	+	+		+	+
动画特效设计	+	+	+	+		+
确认交付	+	+	+	+	+	
任何状态	+	+	+	+	+	+

应用配置 取消修改 当前配置尚未生效，点击应用配置后生效。

⚠️ **Note:**

When setting steps, be mindful of conflicts. As shown, since any status can transition to **Copy Confirmed** status, it overrides other individual steps to the **Copy Confirmed** status, only the **Any Status > Copy Confirmed** step is effective.



4. Select any step and in the **Step Settings** on the right, you can modify the step name, or use the options below to delete the step.

项目协同设置 / 事项类型

美术需求 自定义需求

层级关系设置 编辑基本信息 删除

属性 工作流

表格视图 列表视图 添加状态 创建步骤 配置规则

开始状态 结束状态

	文案确认	UI 设计	原画设计	模型设计	动画特效设计	确认交付
文案确认		+	仅制作原画 未设置规则	+	+	+
UI 设计	文案组交付 未设置规则		+	+	+	+
原画设计	+	+		+	+	+
模型设计	+	+	+		+	+
动画特效设计	+	+	+	+		+
确认交付	+	+	+	+	+	
任何状态	文案组交付 未设置规则 4	+	+	开始建模 未设置规则	上特效 未设置规则	完成 未设置规则

应用配置 取消修改 当前配置尚未生效, 点击应用配置后生效。

删除该步骤

步骤设置
通过步骤可将事项从一个状态转为另一个状态, 它表示在工作流中解决问题而采取的行动

步骤名称 状态转化
文案组交付 任何状态 → 文案确认

规则
执行状态转换前检测限制条件, 转换后自动执行多个自定义操作

尚未添加规则, 点击右上方 + 号添加规则

Editing a Rule

Configuring rules for workflows can help the team check restrictions before executing status changes or automatically perform multiple operations after transitions.

Through the workflow detail page's **Configuration Rules**, or by selecting a specific status, you can configure the rules of steps on the right in **Step Settings > Rules > +**. There are four types: limit step permissions, add attributes, change the handler, and change attribute values, which can be configured according to team needs.

← 项目协同设置 / 事项类型

美术需求 自定义需求

层级关系设置 编辑基本信息 删除

属性 工作流

表格视图 列表视图 添加状态 创建步骤 配置规则

结束状态 文案确认

开始状态

文案确认

UI 设计

文案组交付 未设置规则

原画设计

模型设计

动画特效设计

确认交付

任何状态

文案组交付 未设置规则 4

开始建模 未设置规则

上特效 未设置规则

完成 未设置规则

应用配置 取消修改 当前配置尚未生效, 点击应用配置后生效。

删除该步骤

配置规则

- 限制步骤权限**
状态变更前, 检查当前成员权限, 只允许特定成员执行步骤
- 附加属性**
状态变更前, 需要额外录入属性的值, 提交后方可继续执行步骤
- 更改处理人**
状态变更后, 自动修改事项的处理人
- 更改属性值**
状态变更后, 自动修改属性的值

[了解如何配置工作流规则](#)

步骤设置

通过步骤可将事项从一个状态转为另一个状态, 它表示在工作流中解决问题而采取的行动

步骤名称 状态转化

文案组交付 任何状态 → 文案确认

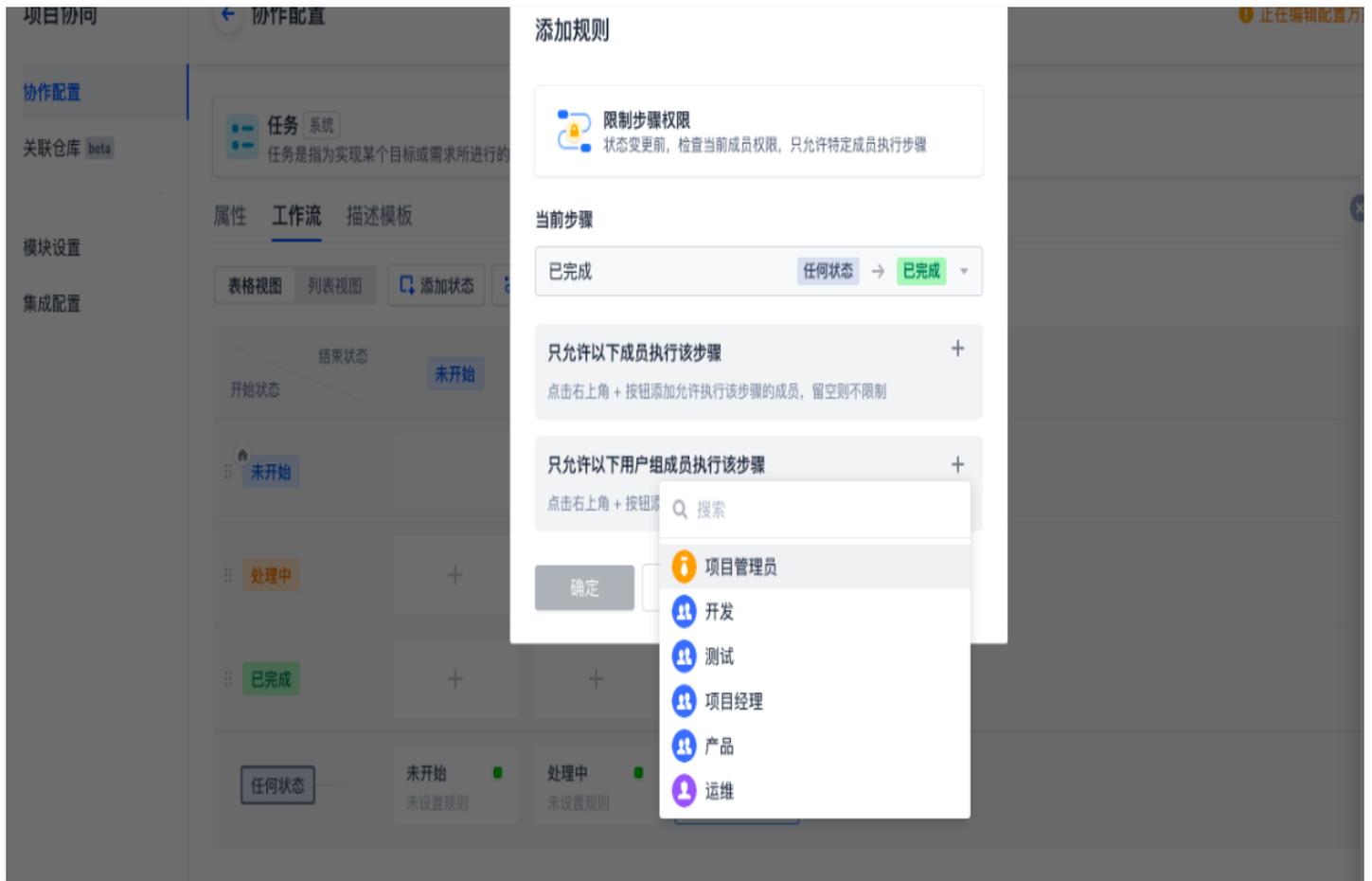
规则

执行状态转换前检测限制条件, 转换后自动执行多个自定义操作

尚未添加规则, 点击右上方 + 号添加规则

Restrict transition permission

By default, no steps restrict members from acting. By setting restricted step permissions, specific user groups in the project can be allowed to perform this transition step. For example, to require project administrators and product managers to confirm before changing to the "Completed" step, relevant user group members can be added to the rules to prevent other members from making mistakes.



Add fields

This rule allows the configuration of more than one field as a form. If this rule is configured, a status change occurs only when members set the required field values.

For example, if a mistake in the copy is discovered during the design process and needs to be recorded and the status changed to **Copy Confirmed**, an additional attribute **Comment** can be added, and setting this attribute as required means the handler must fill in the copy mistake in the comment before the status can be changed.

添加规则

**附加属性**
状态变更前，需要额外录入属性的值，提交后方可继续执行步骤

当前步骤

文案组交付 任何状态 → 文案确认

附加属性

评论

该属性必填

Change assignee

When this rule is configured, it will automatically change the item's assignee after the status change. The assignee can be a choice from default attributes, custom member attributes, or team members.

For instance, when the animation effects design is completed, and the status is changed to **Confirm Delivery**, it is necessary to automatically hand it over to the **Requirement Outcome Evaluator** for consolidation, which requires the following settings:

1. Members of the user group with "Project Collaboration Settings" team permissions can create new members with the Definition attribute in the **Issue Type**.

请选择属性类型

 **单选菜单**
下拉菜单列表，只能选择一项

 **多选菜单**
下拉菜单列表，可以选择多项

 **单行文本输入**
单行文本输入框，适用于简要的文本需求

 **多行文本输入**
多行文本输入框，适合长文本录入

 **单选成员** ✓
单个成员选择组件

 **多选成员**
多个成员选择组件

 **日期选择**
日期选择组件

下一步

2. Designate team members who can act as evaluators.

:: 需求结果评估员	-	未指定	<input type="radio"/>	<input checked="" type="radio"/>		
:: 需求分析员	-	搜索	<input type="radio"/>	<input checked="" type="radio"/>		

- 创建人
- 主账号
- 测试2

3. When the step switches to **Confirm Delivery**, select the assignee.



Change field values

If this rule is configured, the configured field values are automatically changed to the specified values when a status change occurs.

For example, to implement the following workflow: when the step changes to **Confirm Delivery**, the item's priority changes to **Low**.

You can perform the following operations: choose **Editing a Rule**, select **Change Attribute Value**, set the **Current Step** to **any status > Confirm Delivery**, choose the priority attribute, and change its value to **Low** to achieve the described workflow.

添加规则

 **更改属性值**
状态变更后，自动修改属性的值

当前步骤

完成 任何状态 → 确认交付

将更改的属性

优先级

更改为

低

确定 取消

Workflow view

Two view options are available on the workflow configuration page, that is, table view and list view.

- In the **Table view**, the first column and first row indicate the initial status and target status respectively. Each grid in the table indicates a transition prompted when a status change occurs.

表格视图 列表视图 添加状态 创建步骤 配置规则

	开始状态	文案确认	UI 设计	原画设计	模型设计	动画特效设计	确认交付
文案确认		+	仅制作原画 🔒	+	+	+	+
UI 设计	文案组交付 未设置规则		原画开工 未设置规则	+	+	+	+
原画设计	+	+		+	+	+	+
模型设计	+	+	+		+	+	+
动画特效设计	+	+	+	+			完成 👤
确认交付	+	+	+	+	+	+	
任何状态	文案组交付 📅 4	UI 开工 未设置规则	+	开始建模 未设置规则	上特效 未设置规则	确认交付 📝 4	

- In the **List view**, each status has a table that shows all the transitions and user permissions involved when the status acts as the initial status.

表格视图 **列表视图** 添加状态 创建步骤 配置规则 搜索步骤...

文案确认 初始状态

步骤名称	开始状态	目标状态	用户权限
:: 仅制作原画	文案确认	→ 原画设计	全部成员

+ 创建步骤

UI 设计

步骤名称	开始状态	目标状态	用户权限
:: 文案组交付	UI 设计	→ 文案确认	全部成员
:: 原画开工	UI 设计	→ 原画设计	全部成员

+ 创建步骤

原画设计

暂无流转步骤

+ 创建步骤

After confirming the settings, select **Application Configuration**, and the workflow will be effective for all projects.

保存工作流

工作流保存后将立即生效且不可撤销，确定保存吗？

确定 取消

应用配置 取消修改 当前配置尚未生效，点击应用配置后生效。

Project Workflow Configuration

Enter any project, go to the left-side menu, and navigate to **Project Settings > Project Collaboration > Issue Types**. On the right, click **Add Issue Type** to add a new **Art Requirements** created in the team-level workflow. Modify the workflow according to the actual project development workflow. **Configurable options and operations are consistent with 'Team-level Workflow Configuration'**. Refer to the previous text for configuration.

After Application Configuration, any changes to the workflow will only be effective for this project.

项目协同

协作配置

模块设置

集成配置

协作配置

管理事项类型与协作类型

正在编辑配置方案
放弃编辑
应用方案
查看原方案 >

事项类型 +

事项类型名称	描述	操作
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	🗑️ 🔄 ⋮
任务	任务是指为实现某个目标或需求所进行的具体活动。	🗑️ 🔄 ⋮
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	🗑️ 🔄 ⋮
子需求 <small>自定义需求</small>	-	🗑️ 🔄 ⋮
反馈单 <small>自定义需求</small>	-	🗑️ 🔄 ⋮
子工作项	在敏捷模式下，将一个事项拆分成更小的块。	🗑️ 🔄
史诗	史诗是一个较大的功能或特性，可以分解为多个较小的需求或任务。通常其需要分多次迭代才可完成。	🗑️ 🔄 工作流
美术需求 <small>自定义需求</small>	-	🗑️ 🔄 ⋮

In **Classic Project Management** and **Scrum Agile Project Management**, the attributes that can be changed within rules differ.

For example, in **Classic Project Management**, to implement when an item in **Art Requirements** transitions to **Confirm Delivery**, the progress automatically updates to 100%.

The following operations can then be performed: In the art requirements workflow, select to change the attribute value, set the current step to **Any Status > Confirm Delivery**, choose the modified attribute as "Progress", fill in the progress as 100, to achieve the above workflow.

添加规则

更改属性值

状态变更后，自动修改属性的值

当前步骤

确认交付

→

任何状态

→

确认交付

将更改的属性

进度

更改为

清除

%

确定

取消

Note:

Due to the existence of sub-requirements/subtasks, configuration is required in both requirement/task workflows.

Apply other project configuration schemes

Click **Apply Other Configuration Schemes** in the upper right corner of the configuration page to one-click apply the attributes and workflow configurations already configured in other projects, improving work efficiency.



The screenshot displays the 'Collaboration Configuration' (协作配置) page. The left sidebar contains navigation options: 'Project Collaboration' (项目协同), 'Collaboration Configuration' (协作配置), 'Module Settings' (模块设置), and 'Integration Configuration' (集成配置). The main content area is titled 'Collaboration Configuration' and includes a sub-header 'Management of Item Types and Collaboration Types' (管理事项类型与协作类型). A red box highlights the 'Apply Other Configuration Schemes' (应用其他配置方案) button in the top right corner. Below this, there is a section for 'Item Types' (事项类型) with a plus icon. A table lists various item types with their descriptions and actions.

Item Type Name	Description	Actions
需求	需求是指用户解决某一个问题或达到某一目标所需的软件功能。	🗑️ 📄 ⋮
任务	任务是指为实现某个目标或需求所进行的具体活动。	🗑️ 📄 ⋮
缺陷	缺陷是指软件不符合最初定义的业务需求的现象，缺陷管理用于跟踪这些问题和错误。	🗑️ 📄 ⋮
子需求 (自定义需求)	-	🗑️ 📄 ⋮
反馈单 (自定义需求)	-	🗑️ 📄 ⋮
子工作项	在敏捷模式下，将一个事项拆分成更小的块。	🗑️ 📄
史诗	史诗是一个较大的功能或特性，可以分解为多个较小的需求或任务。通常其需要分多次迭代才可完成。	🗑️ 📄 ⋮
美术需求 (自定义需求)	-	🗑️ 📄 ⋮

Project Members and Permission Management

Last updated: 2024-09-05 16:26:17

This article provides a detailed introduction on how to manage members and their corresponding permissions within a project.

Open Project

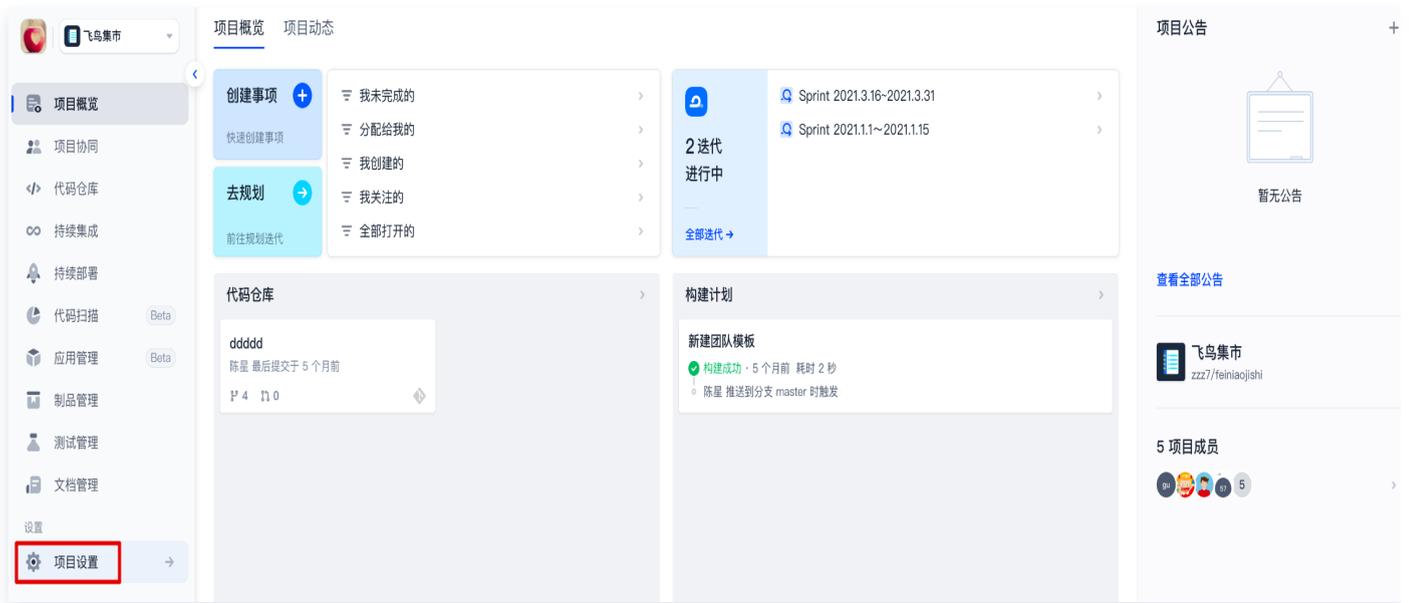
1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Select **Projects** in the navigation bar and click **All Projects** to select and enter the target project.

Within a project, members with **Member Management** project permissions can add and remove members; members with **Member Permission Configuration** project permissions can modify the associated project permission group.

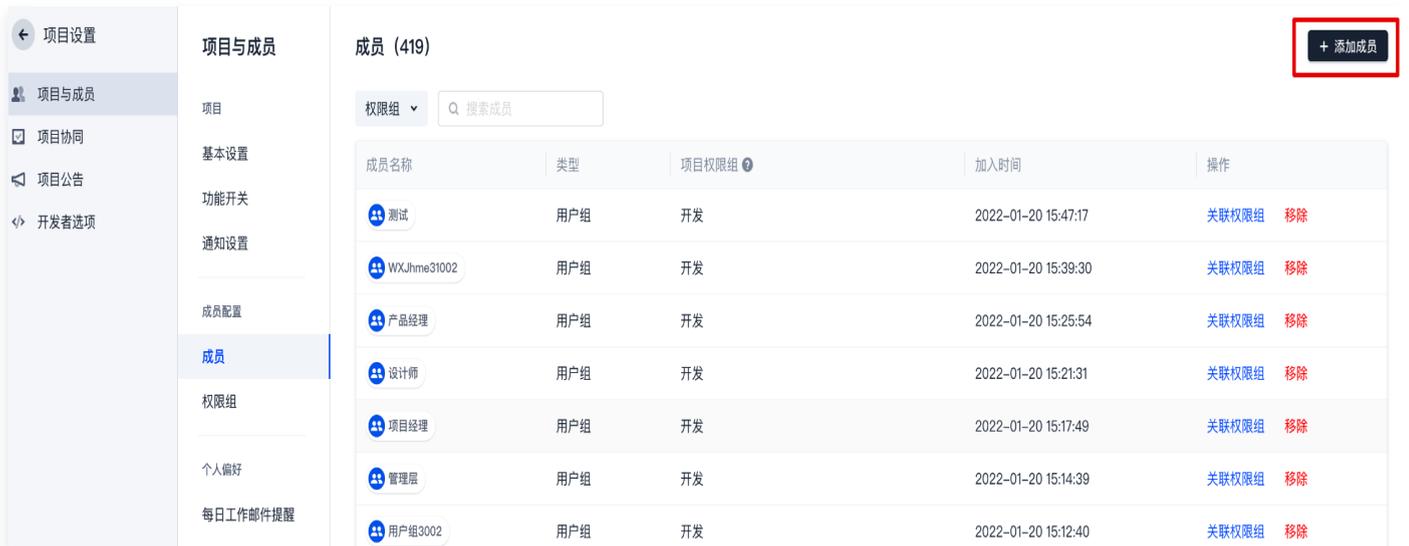
- CODING consolidates project permission groups in the Team Settings Center for configuration and management, and permission group configuration is not supported within a single project. For more details, refer to [Configuring Project Permission Schemes](#).
- To learn how team leaders/admins can centrally manage project members from a team perspective, refer to [Manage Project Members](#).

Adding Project Members

1. After entering the project, click **Project Settings** at the bottom left of the page.



2. In Project Settings > Projects and Members > Members, click Add Members.



3. You can add specified users, user groups, or departments to the current project and set permissions.

ⓘ Note:

User groups are personnel containers representing a collection of similar users, typically configured by team leaders/admins. For more details, refer to [Configuring User Groups](#).



If you need to modify the associated permission group of project members later, refer to the following content for modifications.

Related Permission Group

In **Project Settings > Projects and Members > Members**, click **Related Permission Group** to assign permissions to specified users, user groups, or departments.



Viewing Permissions

In **Project Settings > Projects and Members > Permissions**, click **View Permissions** to view the permission configuration of any permission group.

权限组名称	描述	成员数	创建时间	操作
项目管理员 <small>系</small>	具备项目的所有管理权限。	0	2022-01-11 22:42:21	查看权限
项目经理 <small>系</small>	具备项目协同、测试管理、代码仓库、持续集成、文件管理的访问与操作权限。	1	2022-01-11 22:42:22	查看权限
开发 <small>系</small>	具备代码仓库、持续集成、制品仓库的访问与操作权限。	402	2022-01-11 22:42:22	查看权限
测试 <small>系</small>	具备测试管理的访问与操作权限。	0	2022-01-11 22:42:23	查看权限
产品 <small>系</small>	具备项目协同、文件管理的访问与操作权限。	0	2022-01-11 22:42:23	查看权限

Modifying permission points

To modify the permission point settings in the project permission scheme, please contact the team owner/administrator to refer to [Configure project permission scheme](#) for modifications.

Remove Project Members

In **Project Settings > Projects and Members > Members**, click **Remove** to remove a specified user, user group, or department from the project.

Since the system supports adding individual users, user groups, and departments to the project, there may be overlaps among users, user groups, and departments in the project members. However, removal does not affect each other. For example, if Project Members include User A and Department X (User A, B, C), removing Department X will retain User A in the project; conversely, if User A is removed, User A within Department X will still be retained.

成员名称	类型	项目权限组 <small>?</small>	加入时间	操作
用户组4028	用户组	开发	2022-01-21 15:20:15	关联权限组 移除
测试	用户组	开发	2022-01-20 15:47:17	关联权限组 移除
WXJhme31002	用户组	开发	2022-01-20 15:39:30	关联权限组 移除
产品经理	用户组	开发	2022-01-20 15:25:54	关联权限组 移除

Project Settings

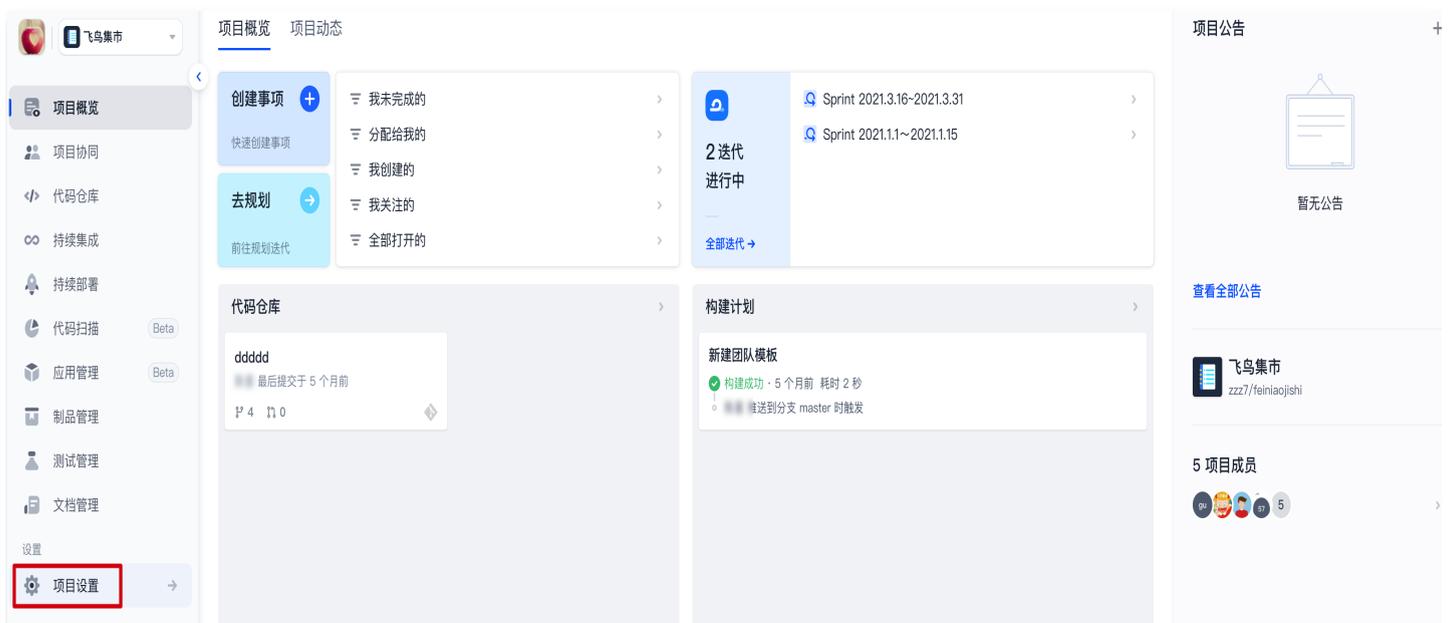
Last updated: 2024-09-05 16:28:58

This document describes how to manage project settings in CODING.

Open Project

1. Log in to [CODING Console](#) and click **Use Now** to enter the CODING usage page.
2. Click **All Projects** in the upper-right corner of the page, select and enter the target project.

After entering the project, the Project Administrator can click **Project Settings** in the lower-left corner of the page to open the Project Settings page for basic settings.



Project Basic Information

To modify project information, go to **Project Settings > Projects and Members > Basic Information** and modify the project's address, name, or start time as needed.

项目与成员

- 项目
- 基本设置**
- 菜单管理
- 通知设置
- 成员配置
- 成员
- 权限组
- 个人偏好
- 每日工作邮件提醒
- 其他
- 分类标签

基本设置

项目名称*

项目地址*

 /

开始时间 截止时间

项目描述

保存

归档项目

归档项目后，将无法继续访问和操作该项目内的数据（里程碑、事项、事项关联关系等），关联项目可正常访问和操作。

归档

删除项目

删除项目会删除项目内的数据（里程碑、事项、事项关联关系等数据），但不会删除关联项目数据。

删除



Note:

Modifying the project's address will change the project's access URL (including the Git repository URL), rendering any previous URLs invalid. Git Repository Address Modification Method:

```
git remote set-url origin $NEW_URL
```

In-Project Menu Management

In **Project Settings > Projects and Members > Menu Management**, you can freely organize and configure the switches of various feature modules in the project according to the team collaboration scenario.

项目与成员

项目

基本设置

菜单管理

通知设置

成员配置

成员

权限组

个人偏好

每日工作邮件提醒

其他

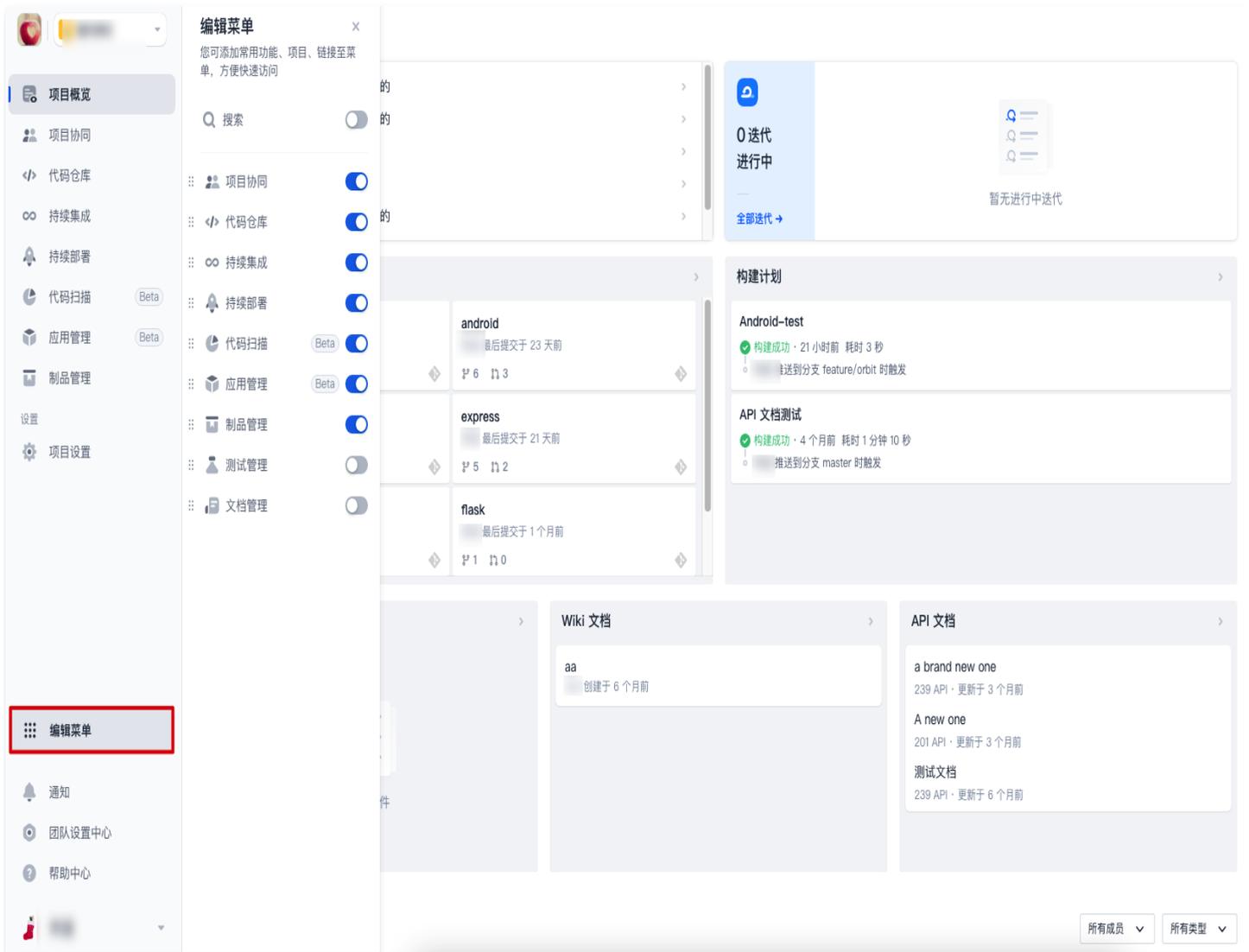
分类标签

菜单管理

管理员可根据团队协作场景，自由组织和配置各功能模块的开关。
关闭后，菜单将隐藏功能模块入口，成员无法访问该模块和数据。但已产生的数据或已配置的触发规则不受影响。再次开启，即可恢复至关闭前状态。

菜单名称	菜单描述	开关
项目协同	管理项目信息，包括需求管理、任务分配、缺陷跟踪、状态流转、进度展示等。	<input checked="" type="checkbox"/>
代码仓库	代码仓库、分支、合并请求、代码评审、发布，包括 设置 > 代码托管。	<input checked="" type="checkbox"/>
持续集成	完全兼容持续集成软件 Jenkins，支持多任务并发。	<input checked="" type="checkbox"/>
持续部署	基于 Spinnaker，支持 Kubernetes、云服务器等多种场景的部署。	<input checked="" type="checkbox"/>
代码扫描	代码检查、代码度量、重复代码、代码统计。	<input checked="" type="checkbox"/>
应用管理	应用管理支持版本化，原子化的发布组件，配置，数据变更。提供应用监控日志，闭环应用研发运维一体化。	<input checked="" type="checkbox"/>
制品管理	管理构建产物，支持 Docker、Maven、Npm、PyPi 等制品库类型。	<input checked="" type="checkbox"/>
测试管理	测试用例管理、测试计划与报告输出。	<input checked="" type="checkbox"/>
文档管理	为团队提供信息整理、知识沉淀的管理工具，使团队通畅地进行信息共享	<input checked="" type="checkbox"/>

When a specific feature module is turned off, its entry will be hidden from the left navigation bar after entering the project. Project members will no longer have access to this module and related data, but the data already generated or configured trigger rules will not be affected. When the feature module is enabled again, it can be restored to the state before the feature module was turned off.



Notification Settings

The types of notifications members can receive depend on the notification settings within the project. The Project Administrator can click **Notification Settings** in the Project Settings to adjust the recipients of different types of event notifications.

项目与成员

- 项目
- 基本设置
- 菜单管理
- 通知设置**
- 成员配置
- 成员
- 权限组
- 个人偏好
- 每日工作邮件提醒
- 其他
- 分类标签

通知设置

事件触发时系统会向接收人发送通知。用户具体接收内容/通知渠道同时受 [个人通知设置](#) 影响。

触发事件	通知接收人	操作
^ 代码仓库		
合并请求合并	当前处理人, 所有关注人 ▾	<input checked="" type="checkbox"/>
合并请求创建	当前处理人, 所有关注人 ▾	<input checked="" type="checkbox"/>
合并请求关闭	当前处理人, 所有关注人 ▾	<input checked="" type="checkbox"/>
合并请求评论	当前处理人, 所有关注人 ▾	<input checked="" type="checkbox"/>
v 代码扫描		

After deselecting a certain type of trigger event, even if a responsible person or follower is specified for this type of event, all project members will not receive message notifications for this type of event.

Daily Work Email Reminder

ⓘ Note:

The daily email reminder is only used to push project change information.

In **Project Settings > Projects and Members**, you can enable **Daily Work Email Alerts**; once enabled, you will receive email notifications about the work to be completed this week, overdue tasks, open defects, and pending merge requests.

项目设置

项目与成员

项目与成员

项目协同

项目公告

开发者选项

项目

基本设置

功能开关

通知设置

成员配置

成员

权限组

个人偏好

每日工作邮件提醒

其他

分类标签

每日工作邮件提醒

管理每日工作概况邮件的开启与关闭以及发送的邮件内容

未开启

将在每天上午收到每日工作概况邮件

提醒内容

本周即将到期, 我未完成的事项 (史诗、需求、任务和子工作项)

已过期, 我未完成的事项 (史诗、需求、任务和子工作项)

分配给我, 未完成的缺陷

代码合并请求, 待我评审的

跳过非工作日 (周六、周日不提醒)

After setting is completed, you will receive an email every morning between 08:30 – 10:00, formatted as follows:



Hi 张小虎,

您在 CODING 上有 15 个事项需要处理:

本周即将到期的事项 (3条)

事项标题	优先级	状态	所属项目	
🔔 付费完成后, 弹框中订阅时长没有显示	明天截止	🔴 紧急	计划中	CODING Suzho...
🔗 自定义筛选器支持团队公用筛选器	明天截止	🟡 高	已发布	CODING Dev
🔧 测试用例编辑能直接以抽屉或弹窗形式展示方便...	10月24日截止	🟡 中	计划中	文件网盘项目
🔔 企业概览页将项目配置菜单移至项目管理菜单下方	明天截止	🟡 中	进行中	个人版迁移

已逾期未完成的事项 (2条)

事项标题	优先级	状态	所属项目	
🔔 付费完成后, 弹框中订阅时长没有显示	10月24日已过期	🔴 紧急	计划中	CODING Suzho...
🔗 自定义筛选器支持团队公用筛选器	10月24日已过期	🟡 高	计划中	CODING Dev

我未完成的缺陷 (30条) [查看更多](#)

事项标题	优先级	状态	所属项目	
🔔 付费完成后, 弹框中订阅时长没有显示	10月24日已过期	🔴 紧急	计划中	CODING Suzho...

待评审的合并请求 (2条)

标题	所属仓库	提交时间
CI Job 按照 Jenkinsfile 模版创建后未自动	mini-shop-jave	2019/12/23 18:20
合并请求的原分支有新的提交时	service-desk	2019/12/24 09:30

如果您不想再接受类似通知邮件, 请点击[这里](#)修改通知设置。请勿回复此邮件, 如有疑问, 请联系我们: enterprise@coding.net

CODING 团队

如有任何疑问，欢迎拨打 400-830-6861 联系我们

Tag Classification

Project Tags are used for categorizing feature modules (tasks, requirements, defects, merge requests, etc.) within the project.

1. In **Project Settings > Projects and Members > Category Tag**, click **New Tag**.

If no Tags have been created yet, you can also click **One-Click Default Tag Preset**.



2. Enter the Tag name and select the Tag color in the input box to complete the creation of a project Tag.

3. After the Tag is created, you can assign it to items when you create them.