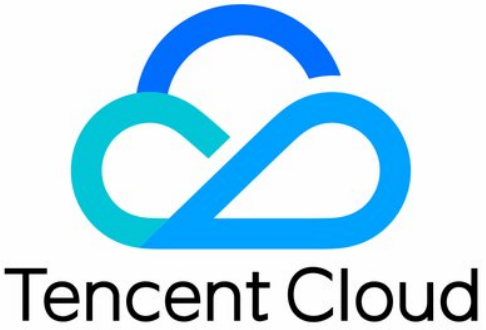
CODING DevOps

Project Management



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Contents

Project Management
Select Suitable Collaboration Mode

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

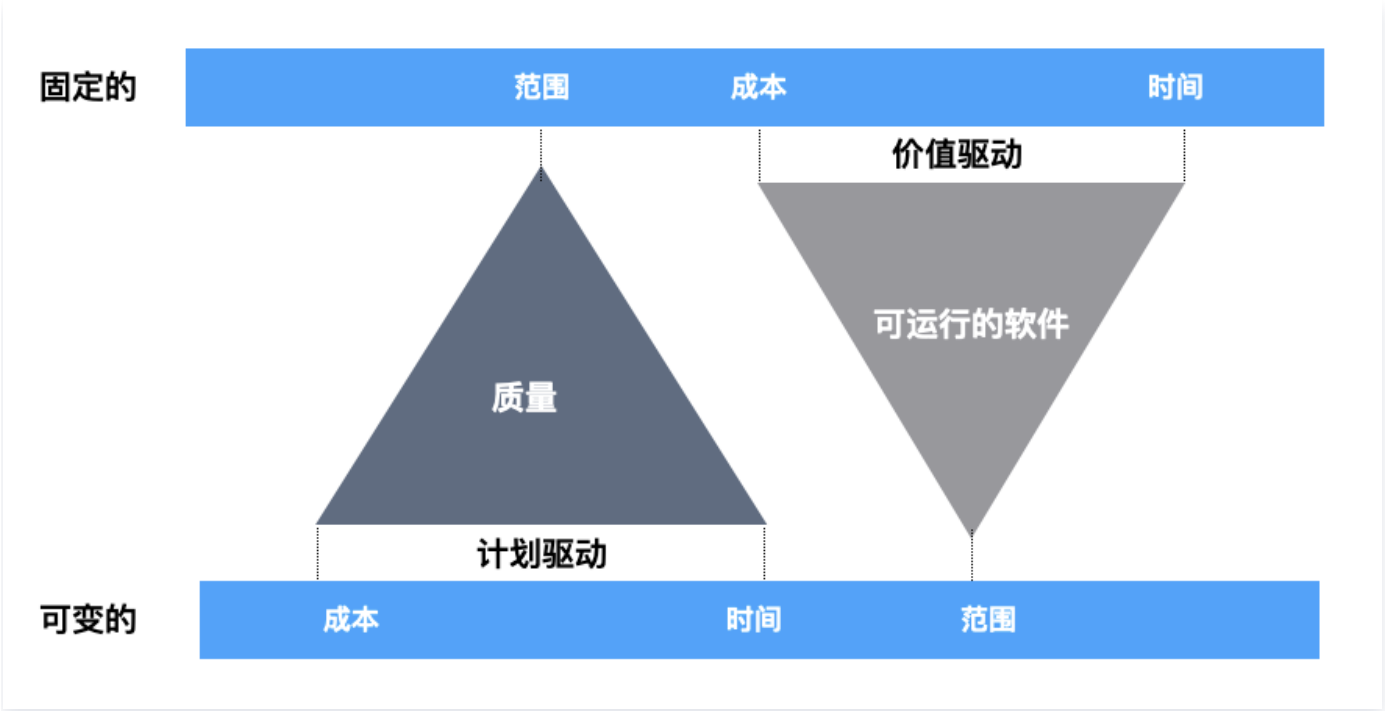
Open Project

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

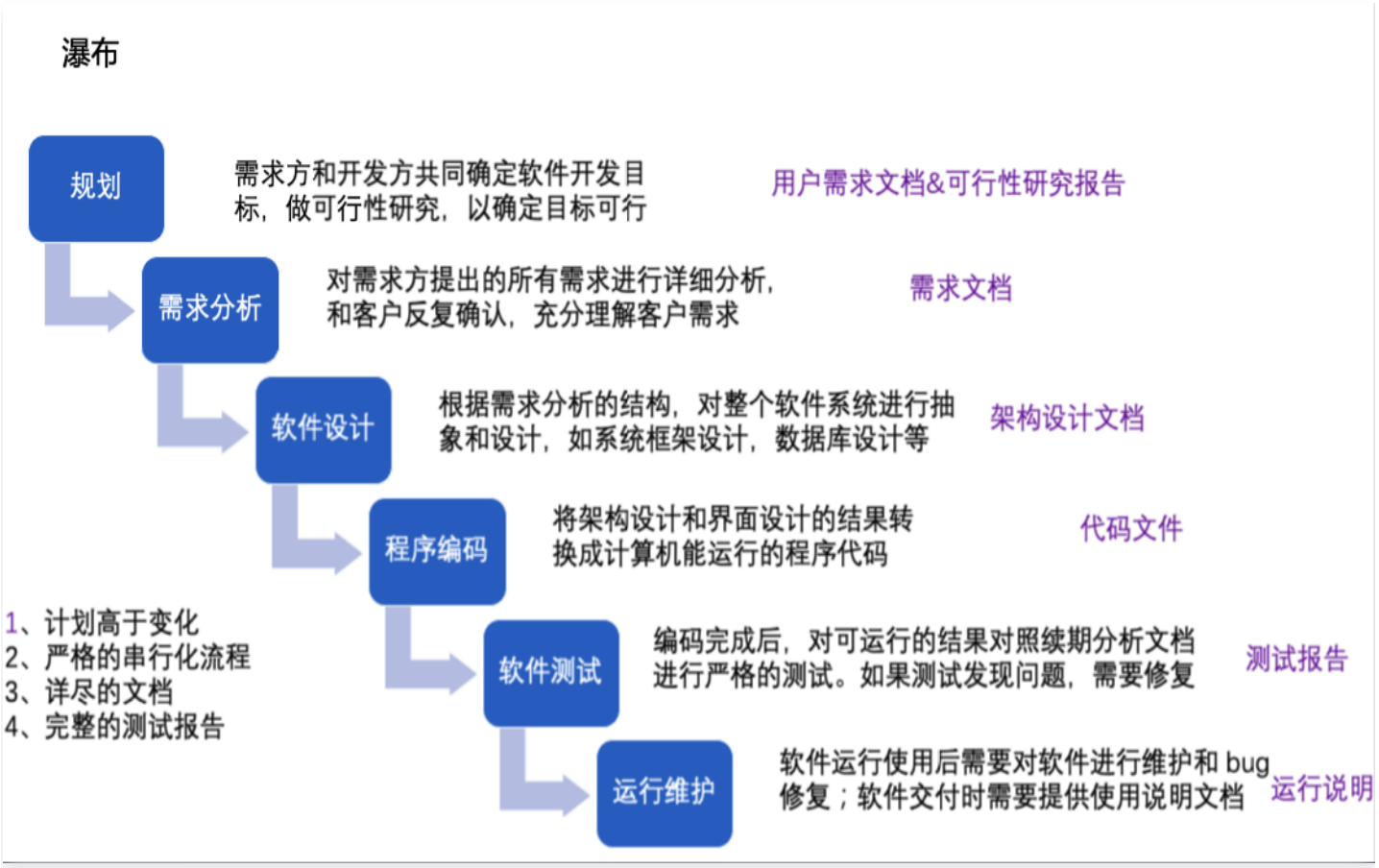
project plans and business commitments. For internet products, where requirements and users are often unstable, adopting an agile mode can yield faster market feedback, making detailed long-term planning impractical and unsuitable.

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.

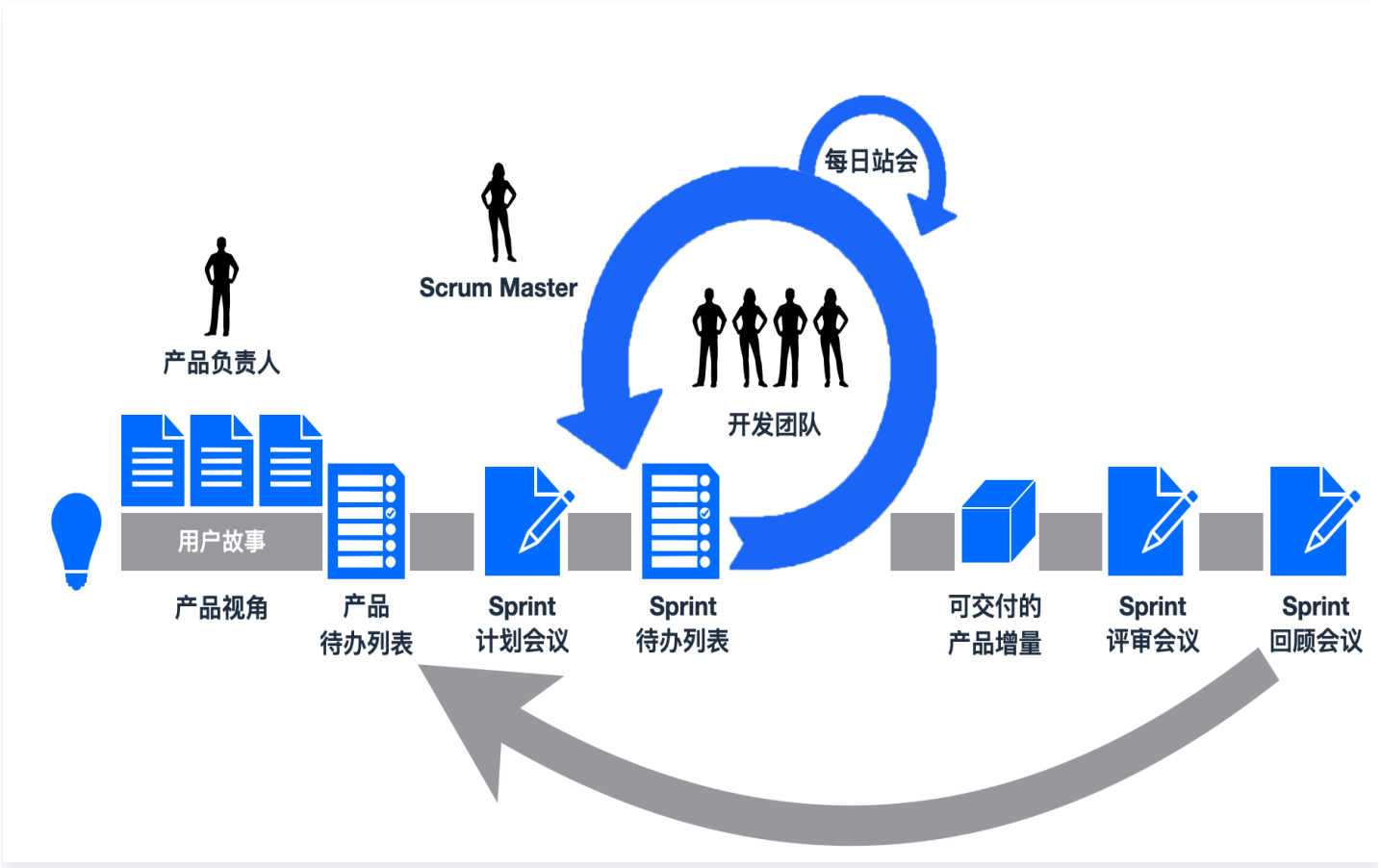


Interestingly, Royce originally proposed this model not to solely endorse the Waterfall approach but to highlight its possible high risk when dealing with projects with frequently changing requirements. However, the Waterfall Model inadvertently offers a structured, easy-to-understand linear process 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

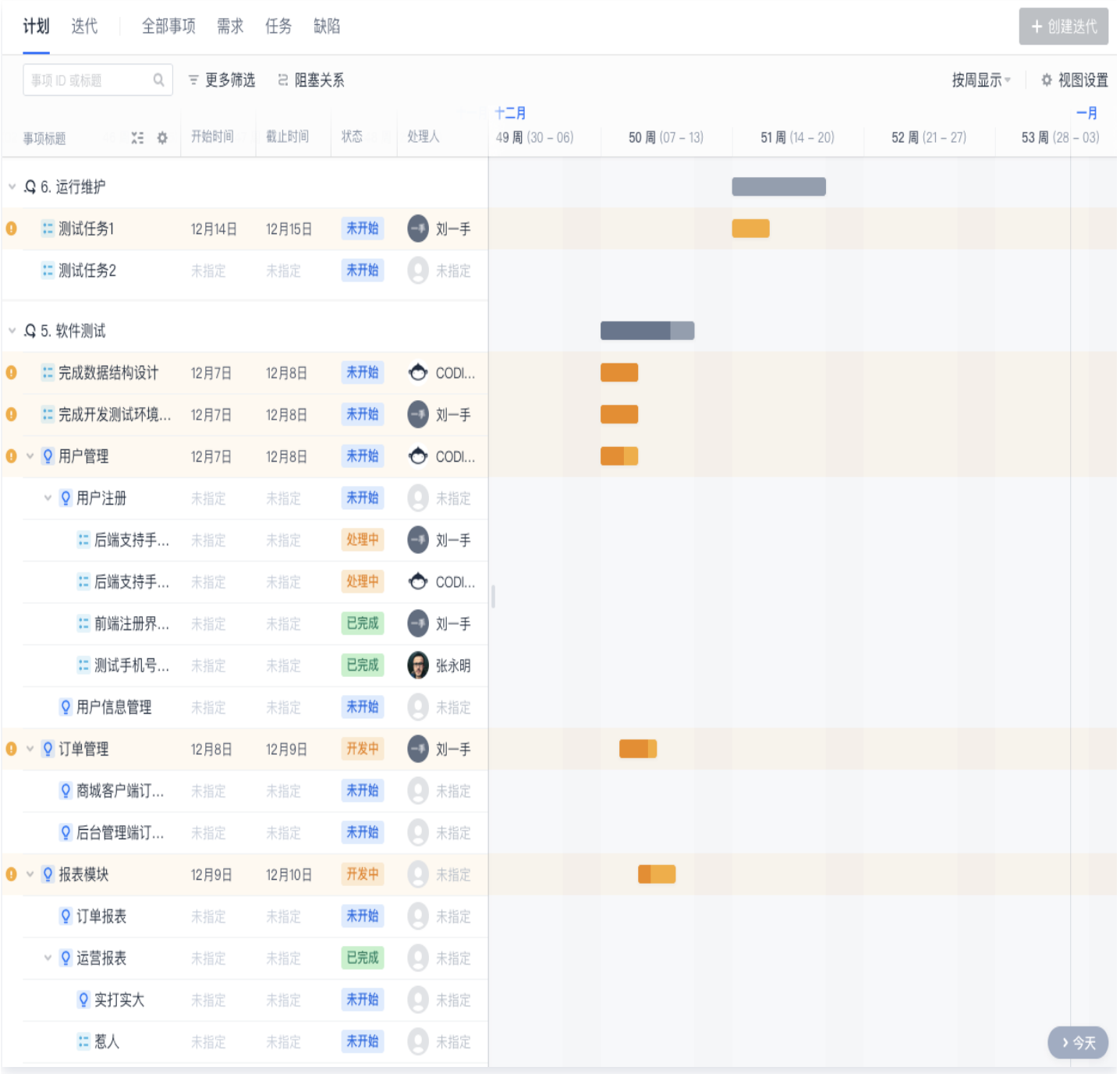
We do not regard traditional project management and agile project management as mutually exclusive. Each has its unique characteristics and applicable scenarios, and both have digitalization needs. CODING Project Collaboration offers **classic project management based on traditional models** and **Scrum 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
工作流	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	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.

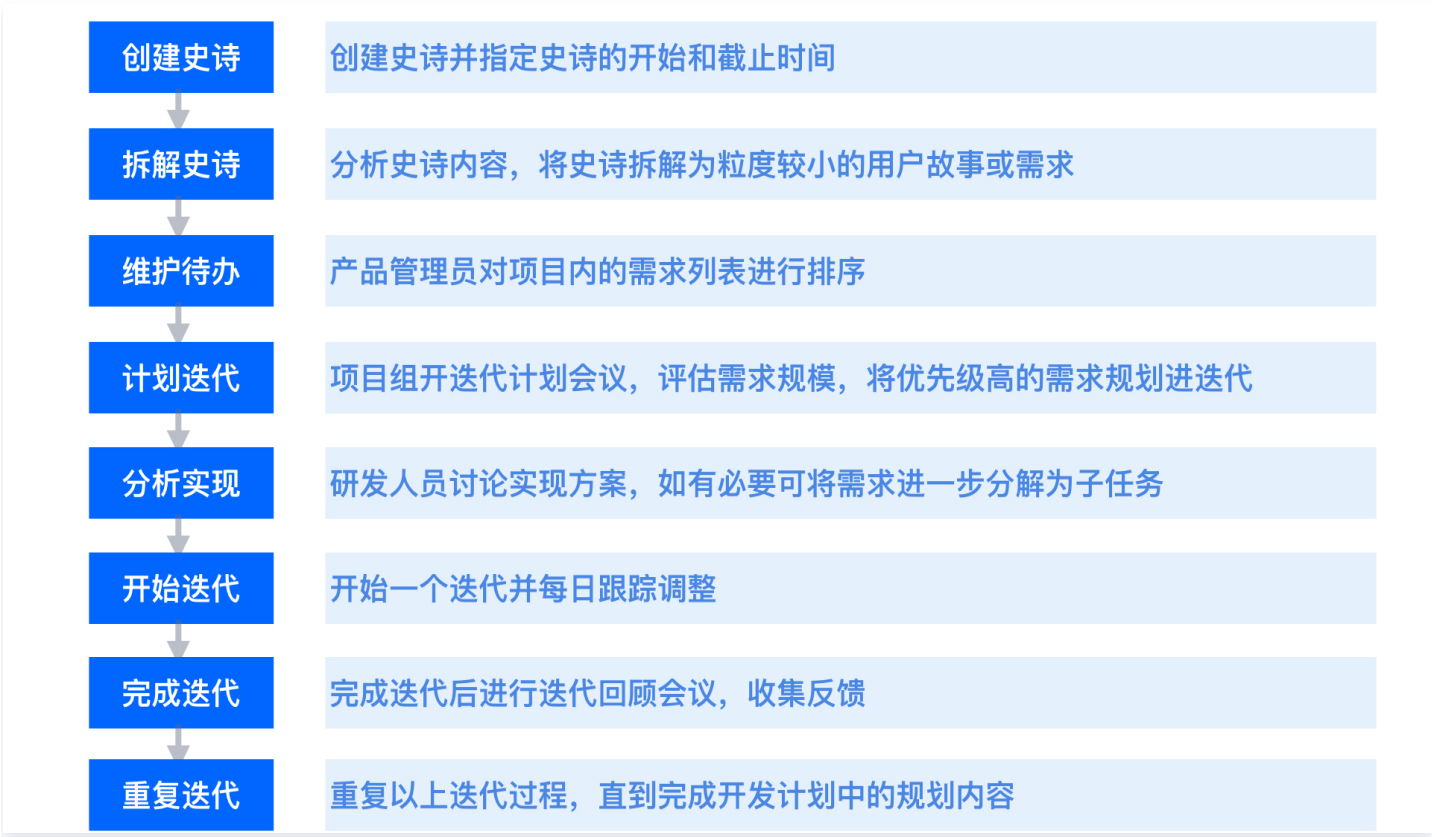


In addition to the above capabilities, with CODING's file cloud drive and Wiki knowledge base, teams can easily manage documents in traditional project management processes.

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

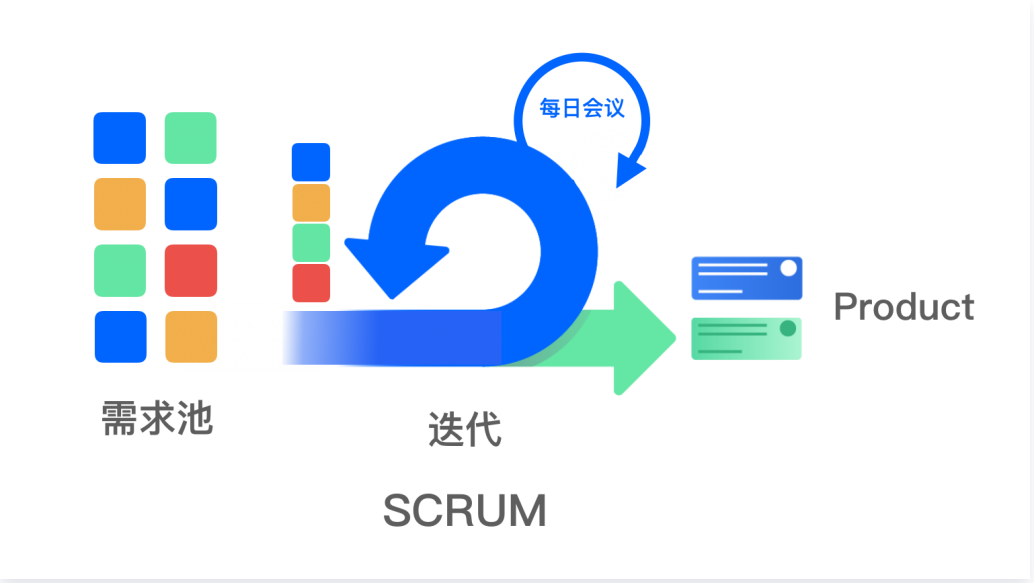
This document describes the Scrum agile project management mode in CODING Project Collaboration.

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 .

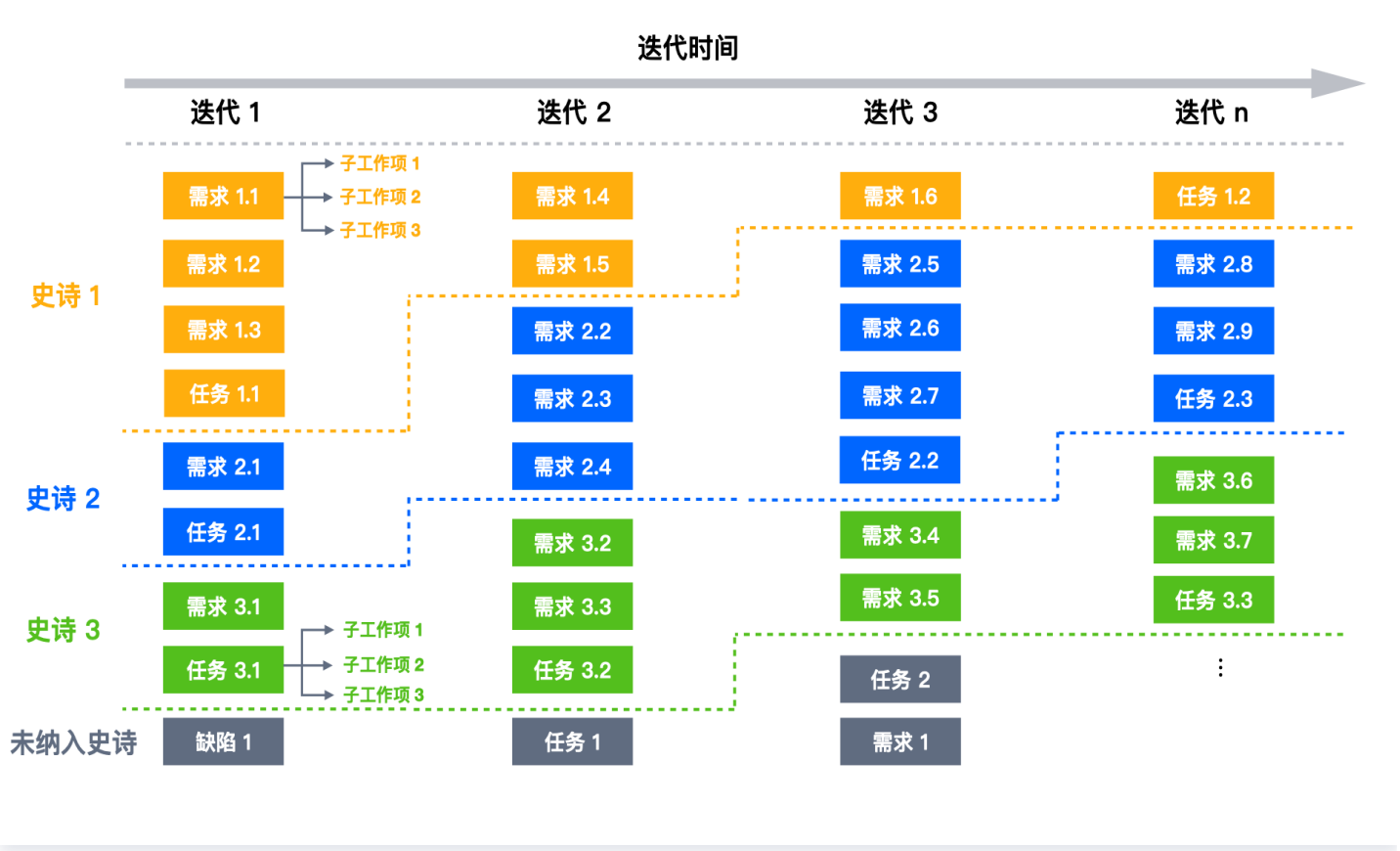
Features

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:

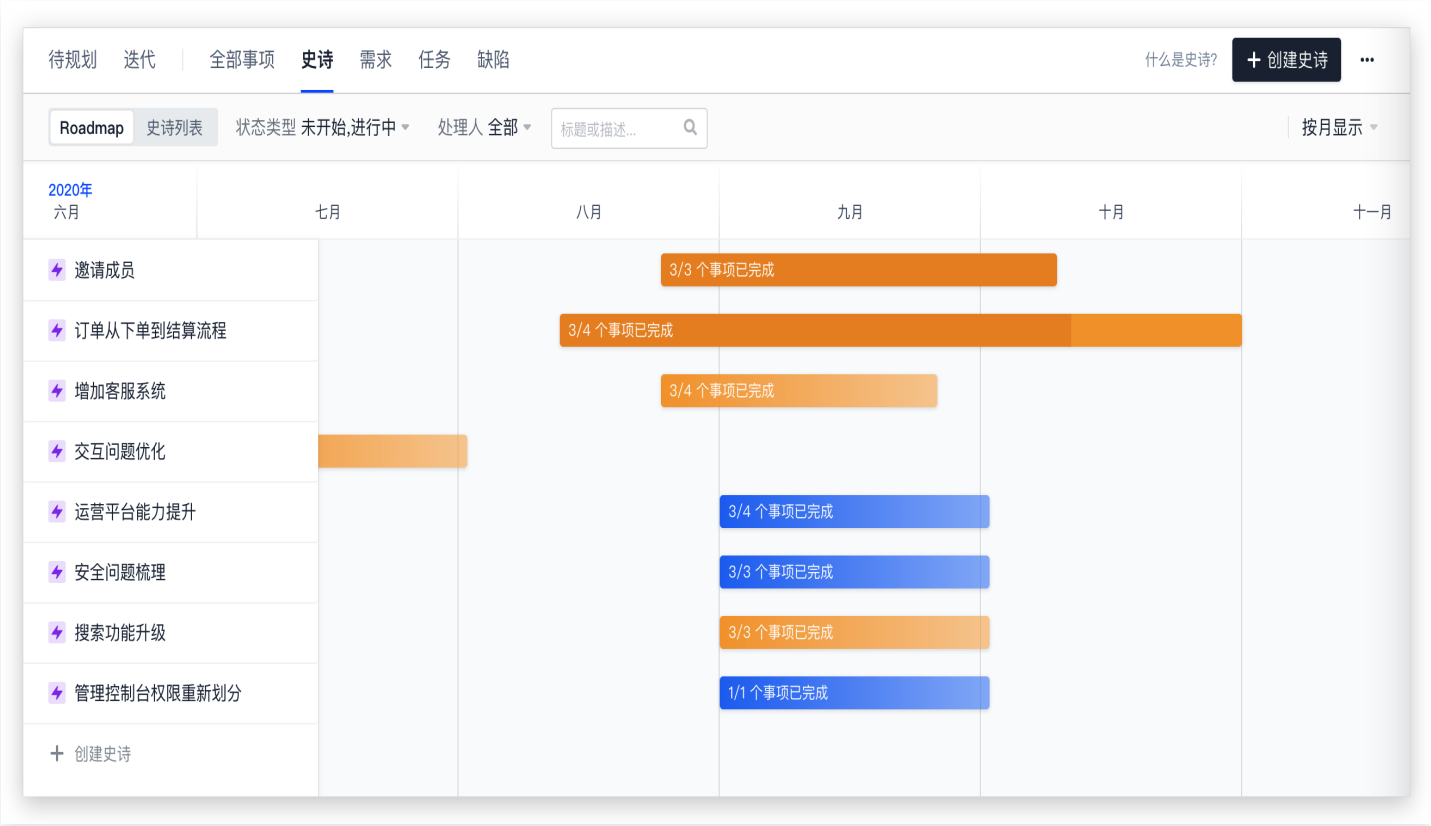


Iterations

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.

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.



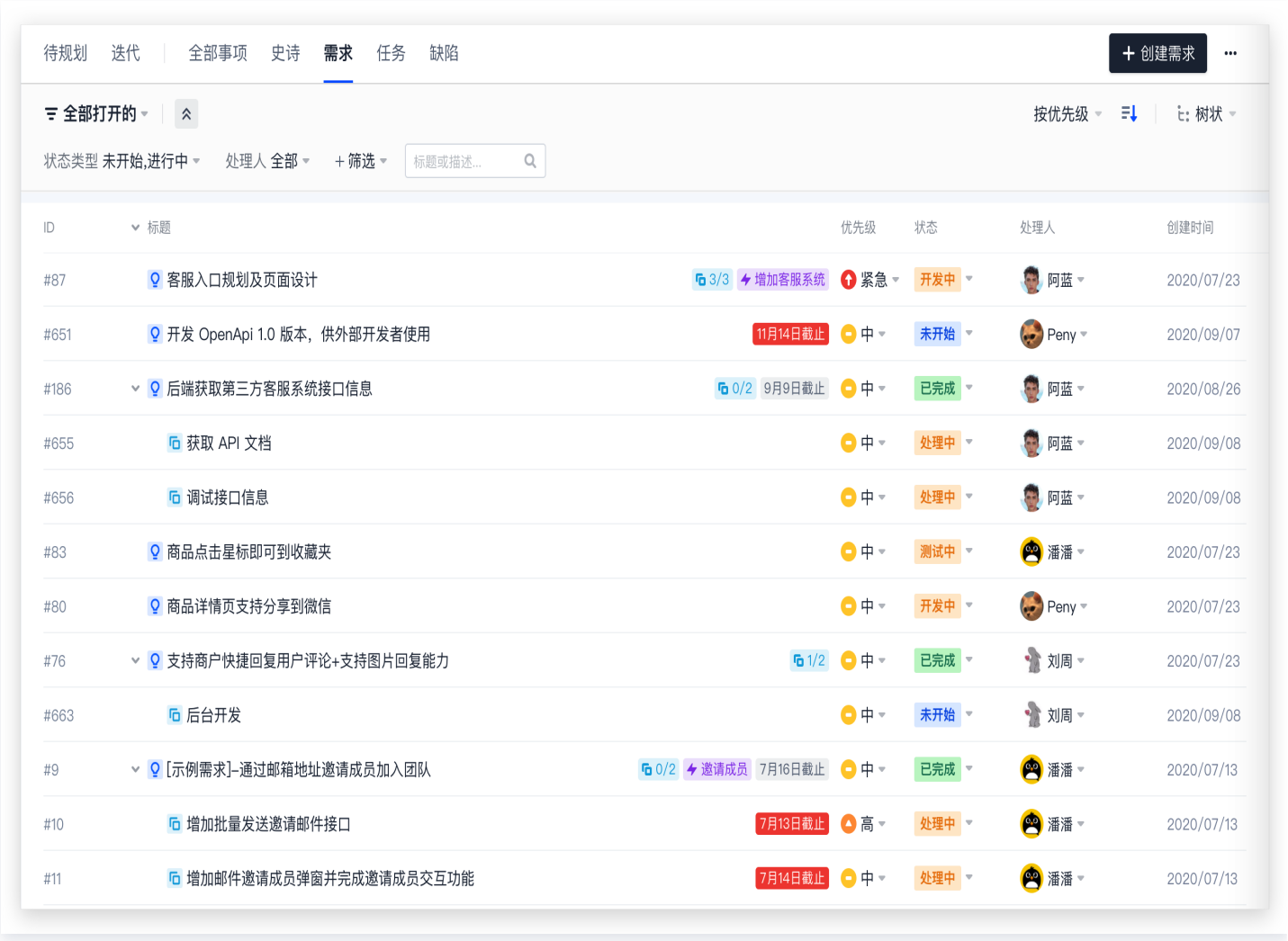
User stories

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?

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.

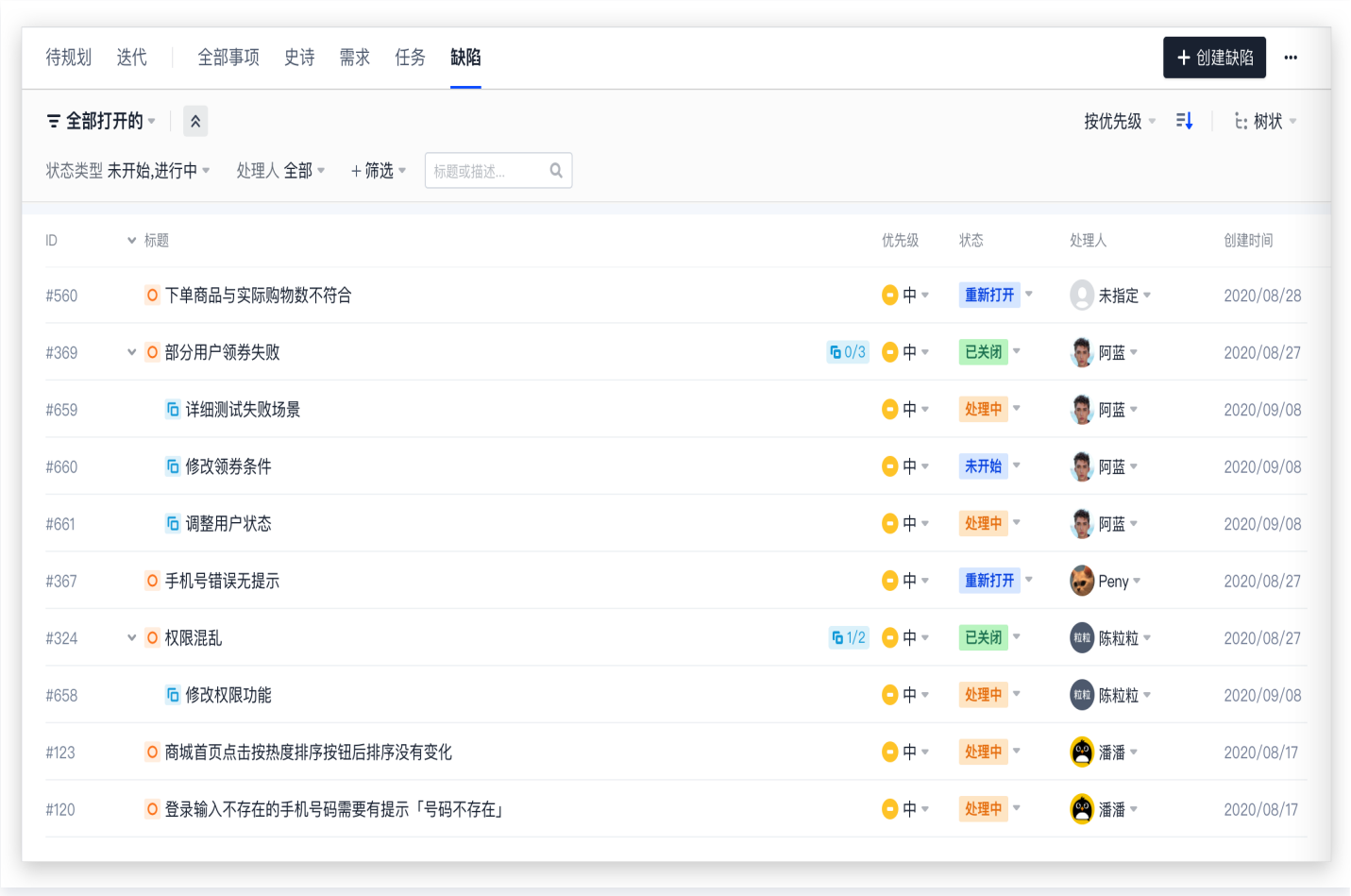


Task

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.

Bug

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



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

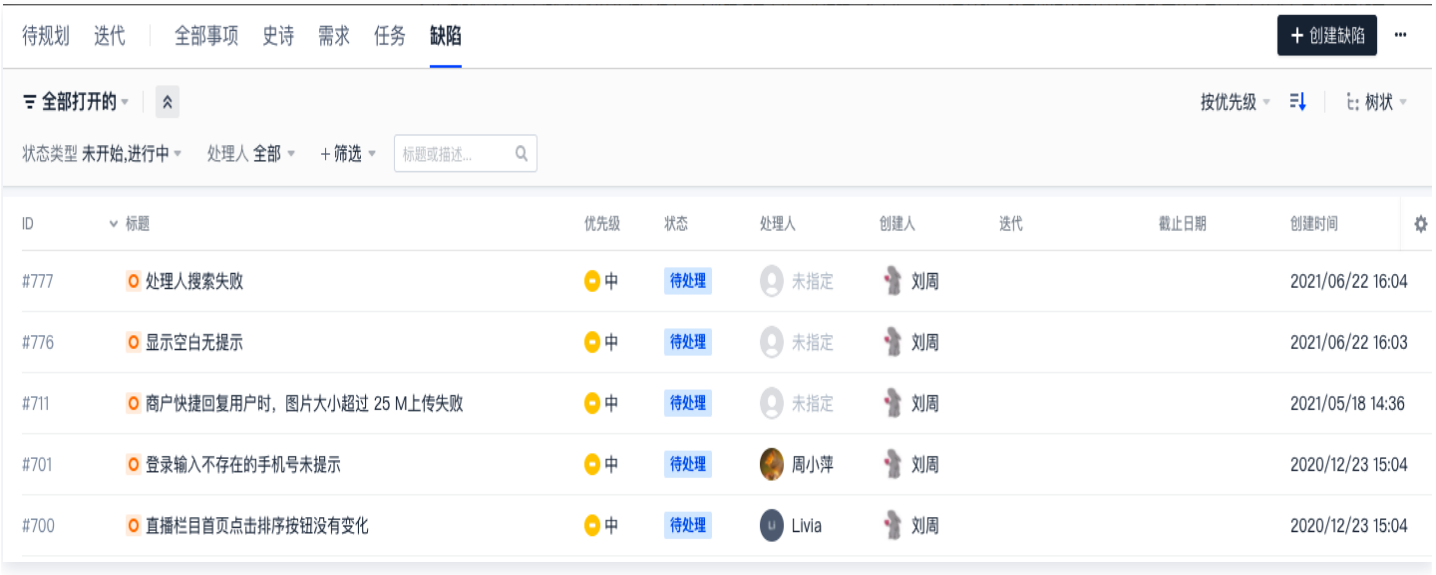
In the requirement management module, the product owner can maintain and update the product backlog. User stories and requirements can be assigned by the product owner or claimed by developers. When drafting user stories and requirements, the product owner can specify key information such as priority,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

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.



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.

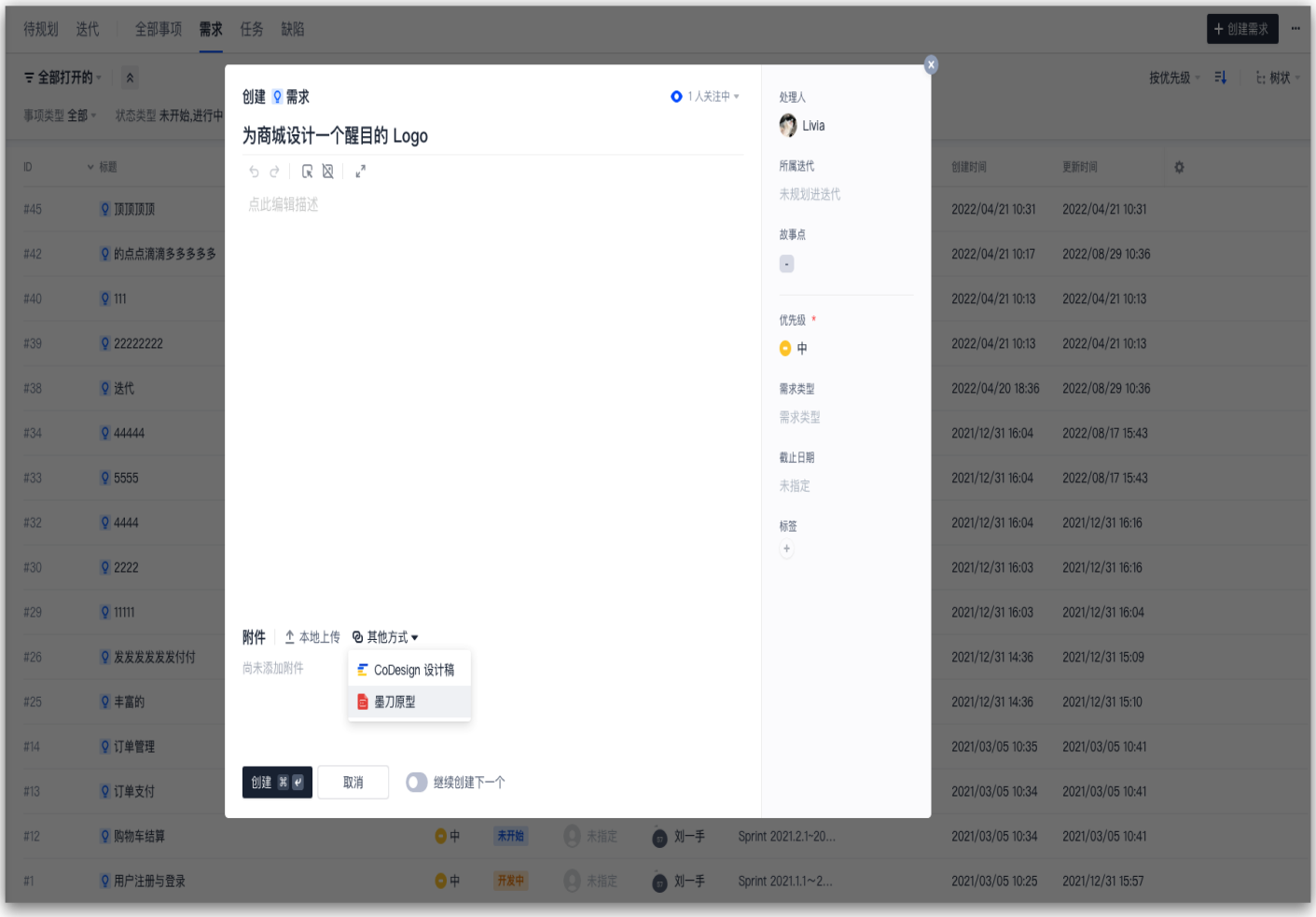
The following example uses a virtual mall, Feiniao Market, to describe how a team can collaborate using classic project management.

Enable classic project management mode

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

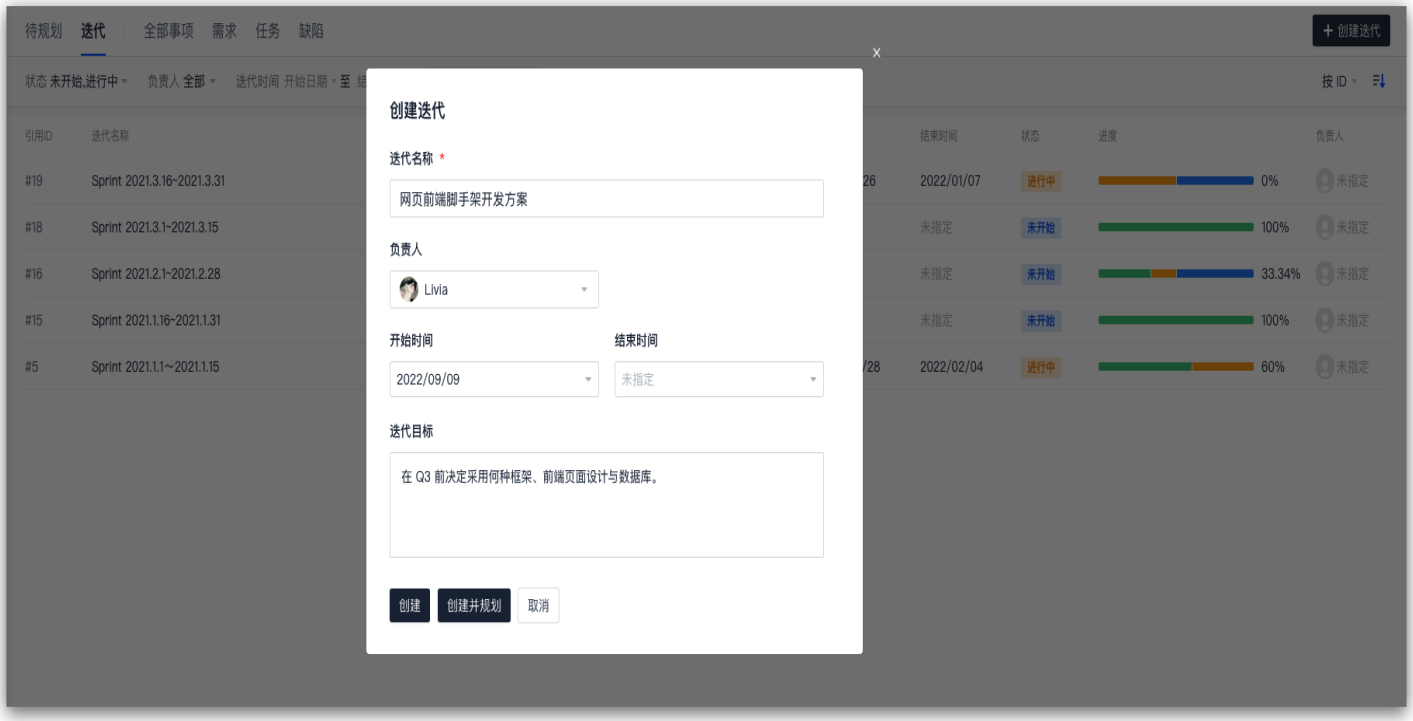
Create requirement

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.



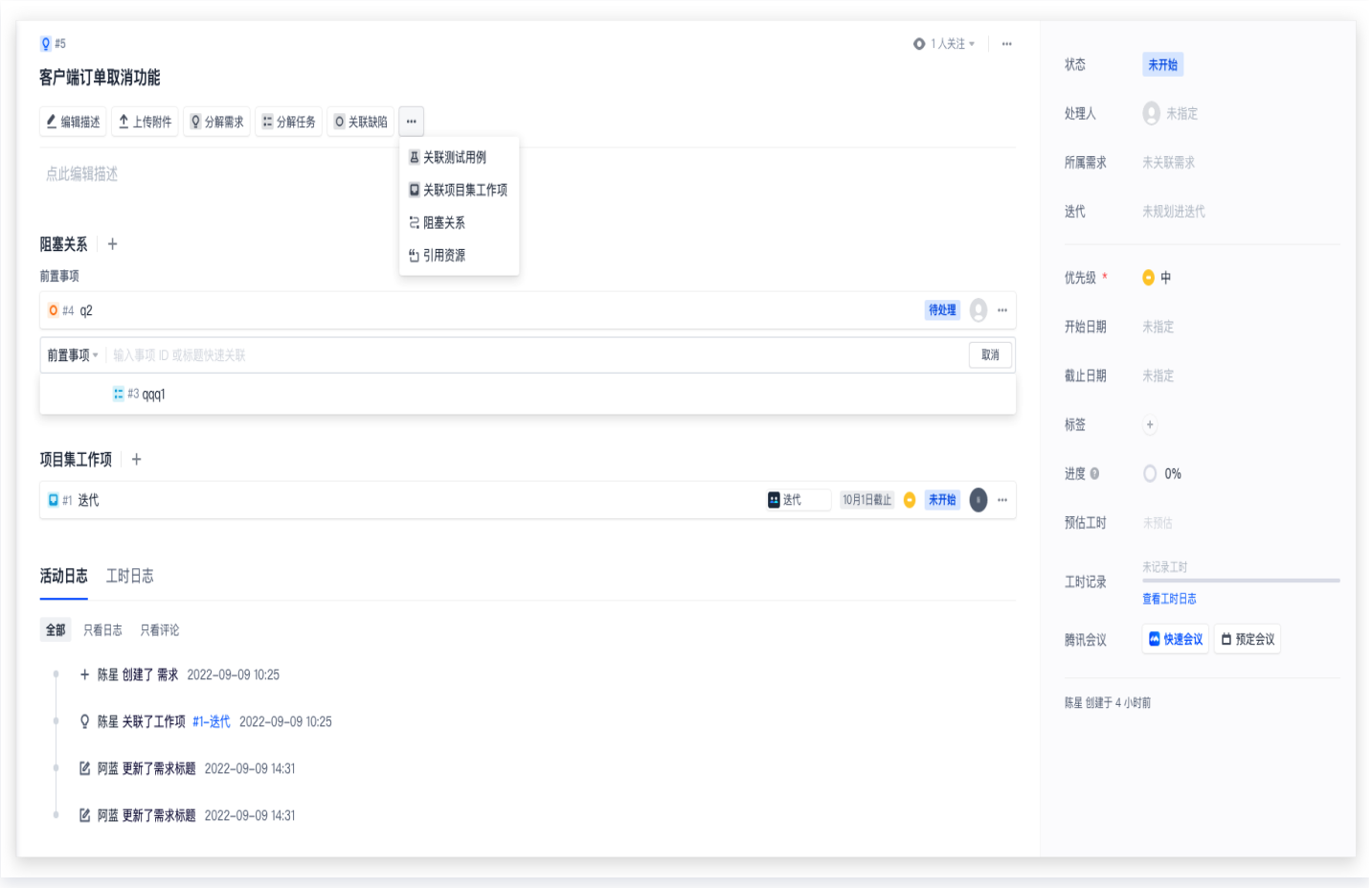
Coordinate development plan

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.

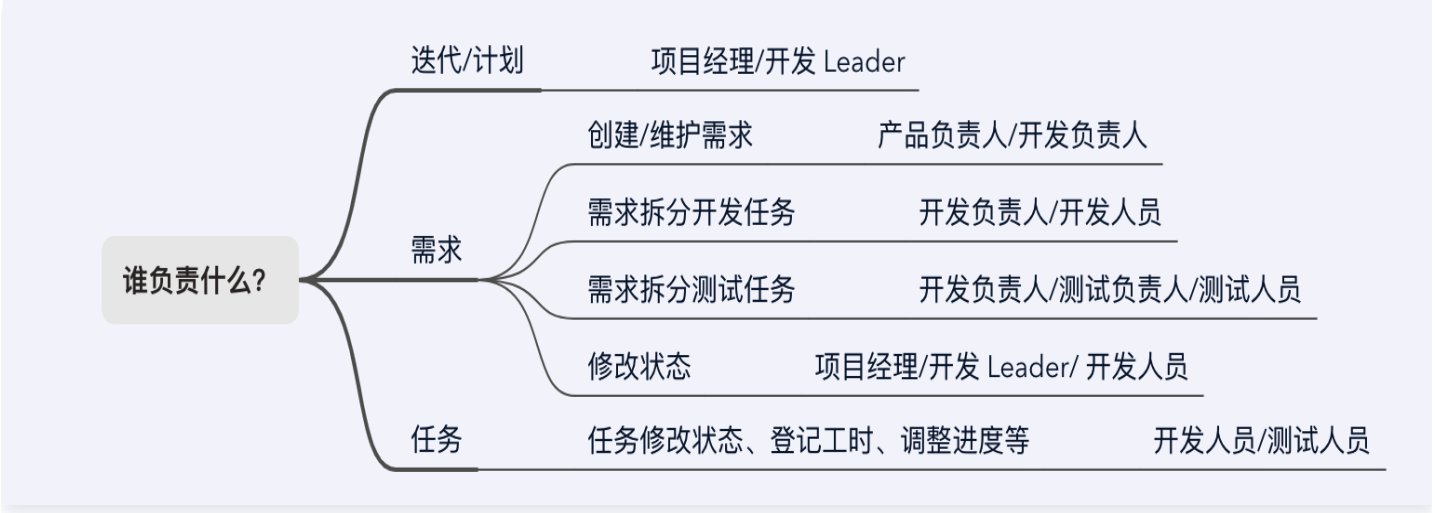


Using this feature, you can split larger plans (including but not limited to development plans) into specific issues (such as requirements and tasks) assigned to specific assignees. All requirements created by the product manager in the early phase can also be seamlessly integrated into the iteration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

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.



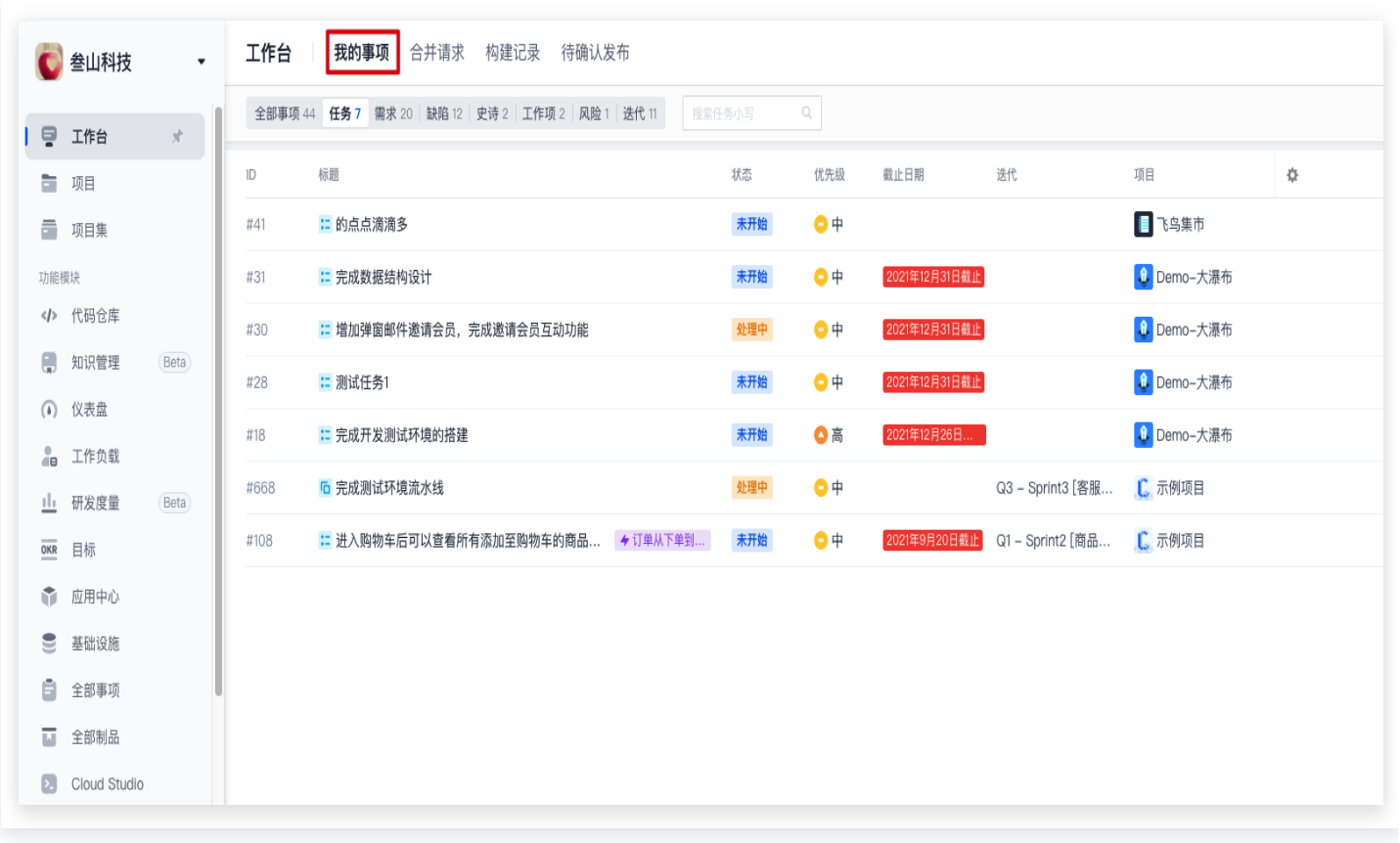
Assign development task



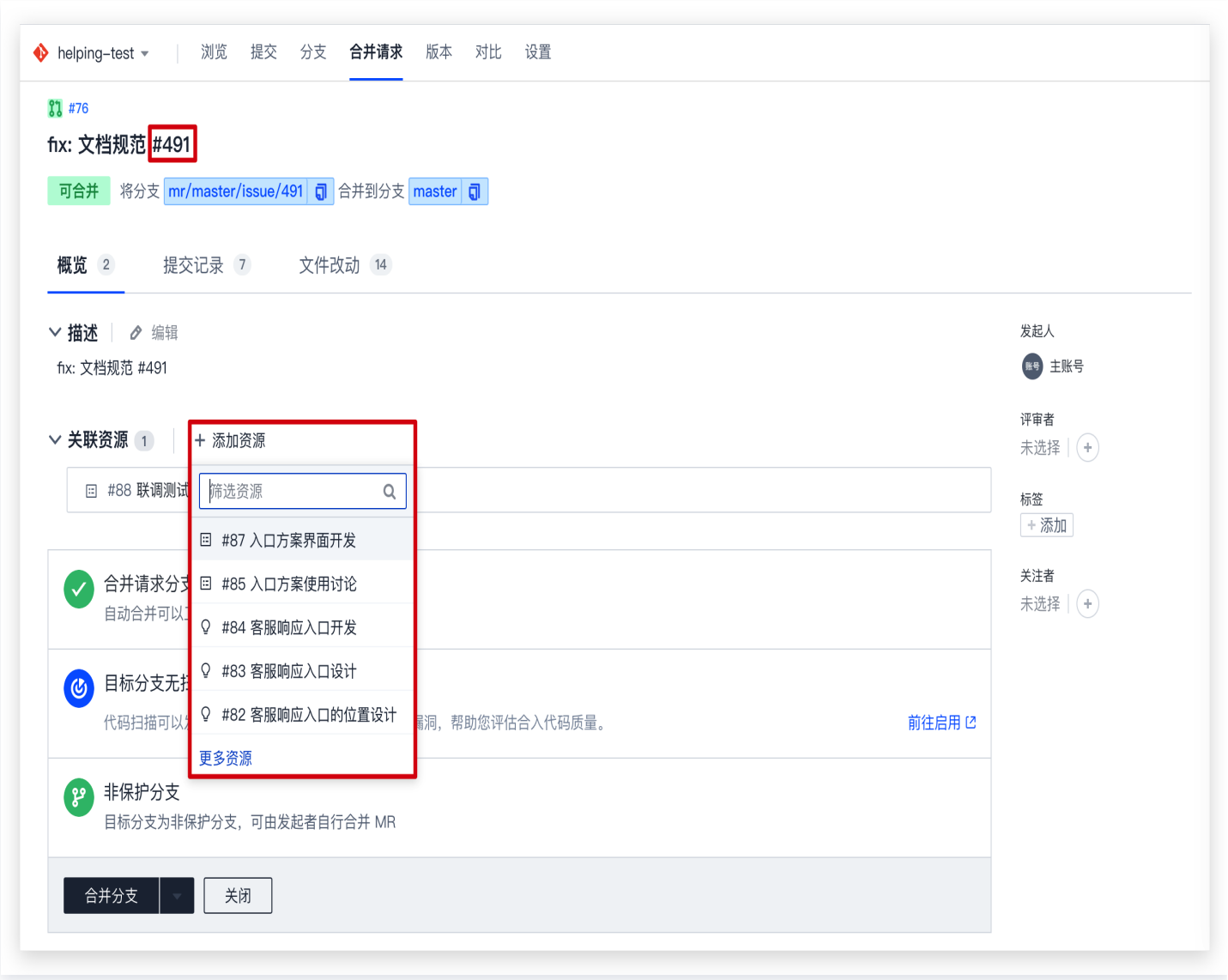
In an iteration plan, team members can collaborate by creating issues or accepting issues assigned by others. For example, you can break down a requirement to launch a customer service entry into development and test tasks. After the development has been completed, you can continue breaking down the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

Execution plan

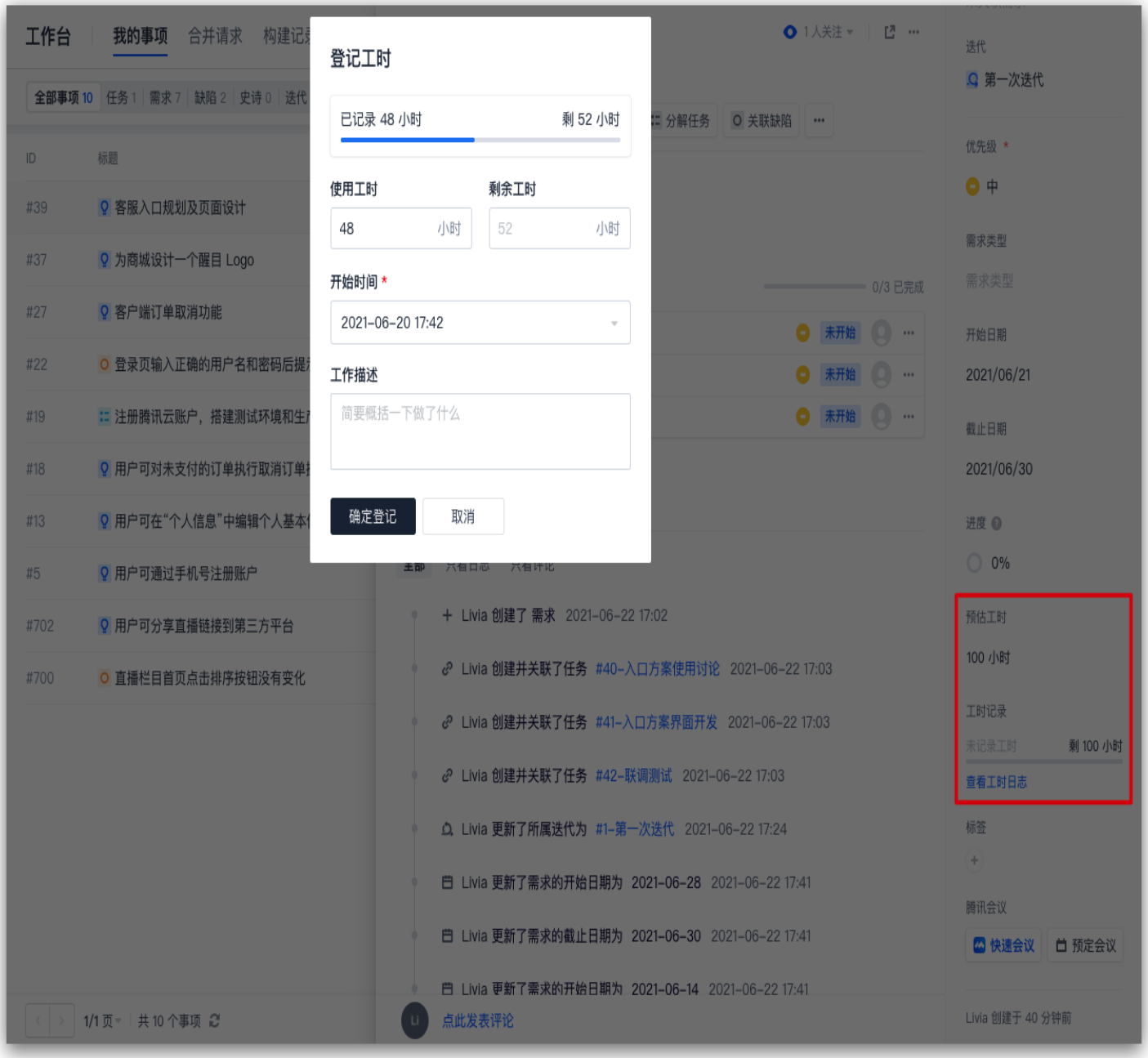
After the various plans have been completed and assigned to specific assignees, team members can view tasks to be completed in **workspace > My tasks** on the team homepage, along with merge requests initiated by them or pending checks, build tasks in continuous integration, and pending continuous deployment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



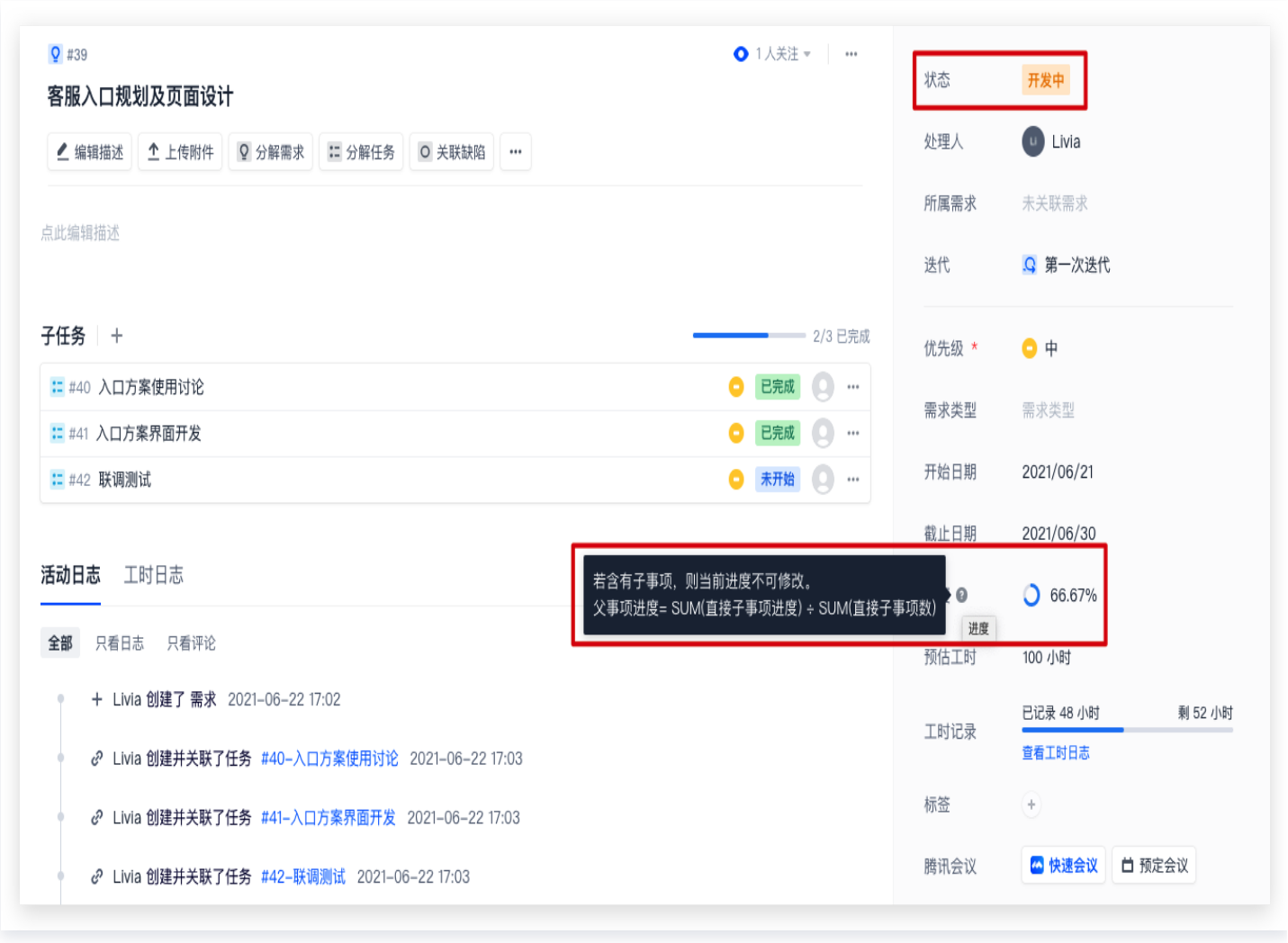
For development tasks, you can also directly reference merge request records in code repositories. For details, see Reference resources & upload attachments . After associating the items, you can see the code commit record and development status in the development task.



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.



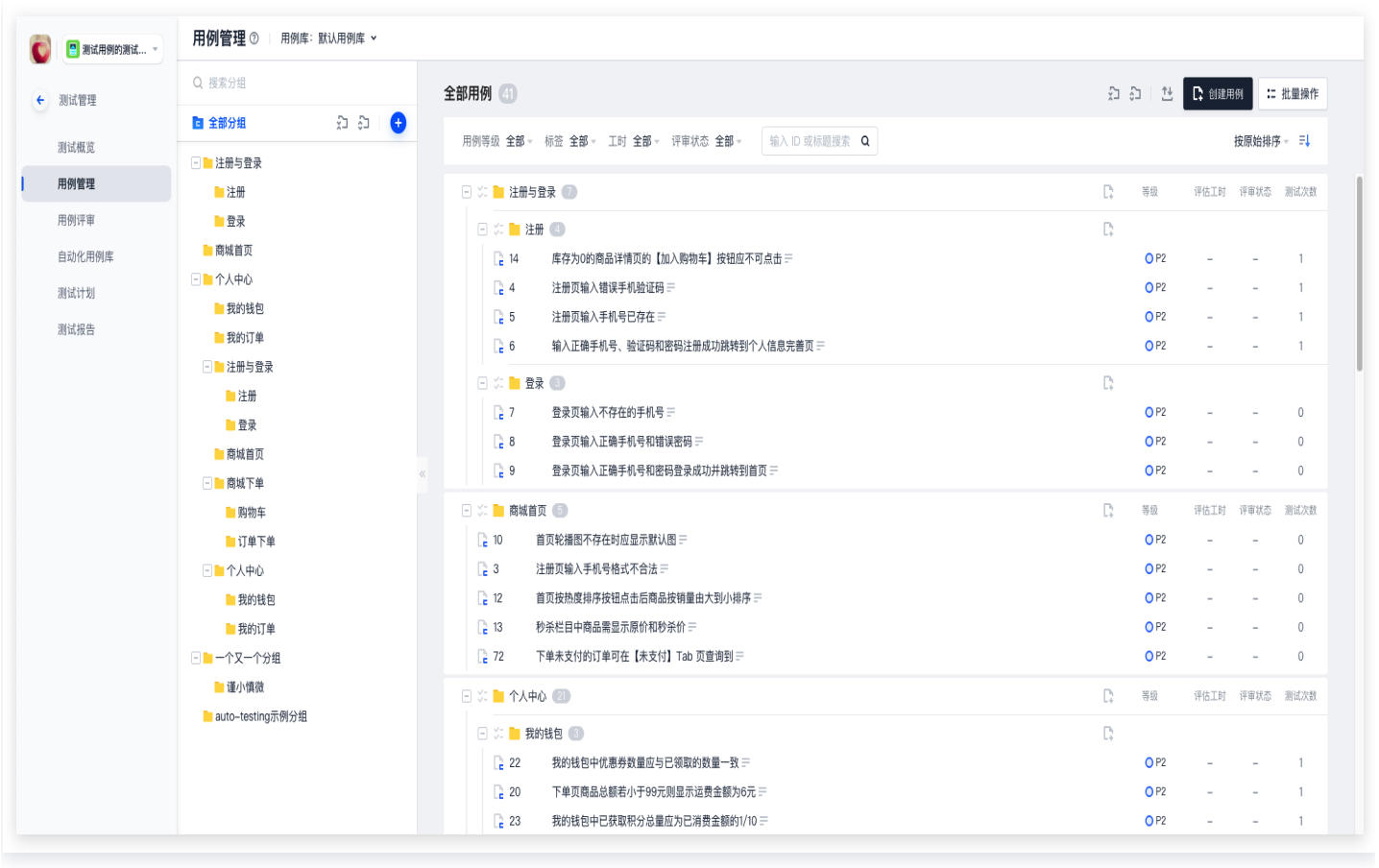
Before leaving work, members can change the status of a daily task to "completed" and update development progress percentage. The iteration progress will update as each issue progresses.



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.



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

Project Release

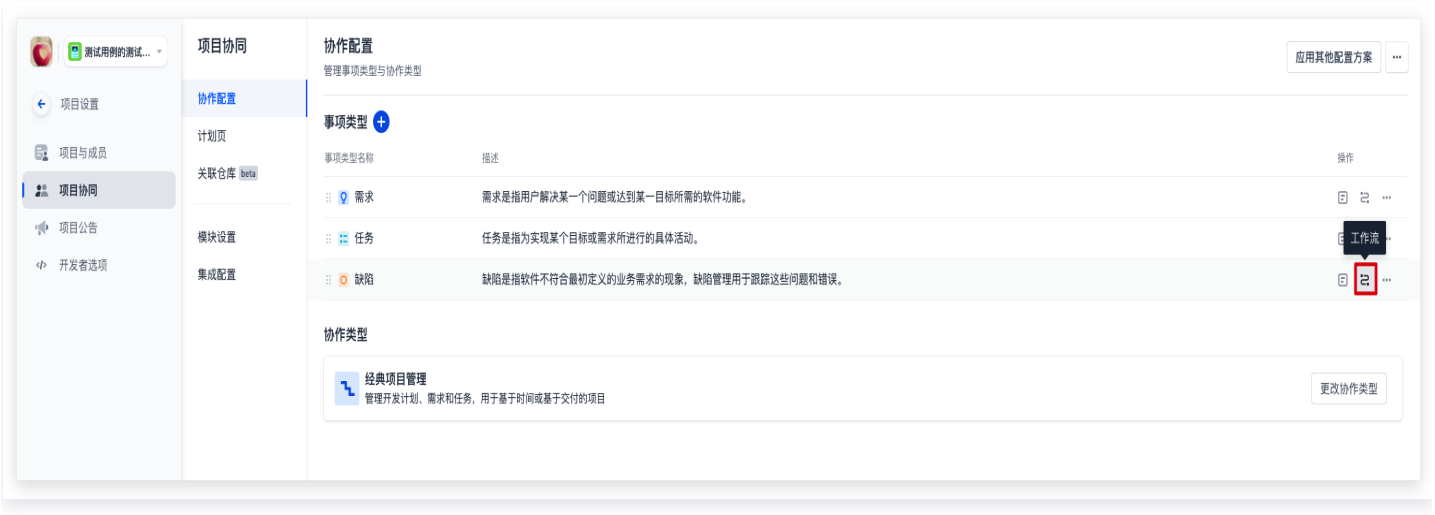
After the basic development task has been completed, you can use CODING's continuous integration/deployment services to quickly validate the code.

> **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.



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.

Import Issues

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

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

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，确认后可删除。		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.

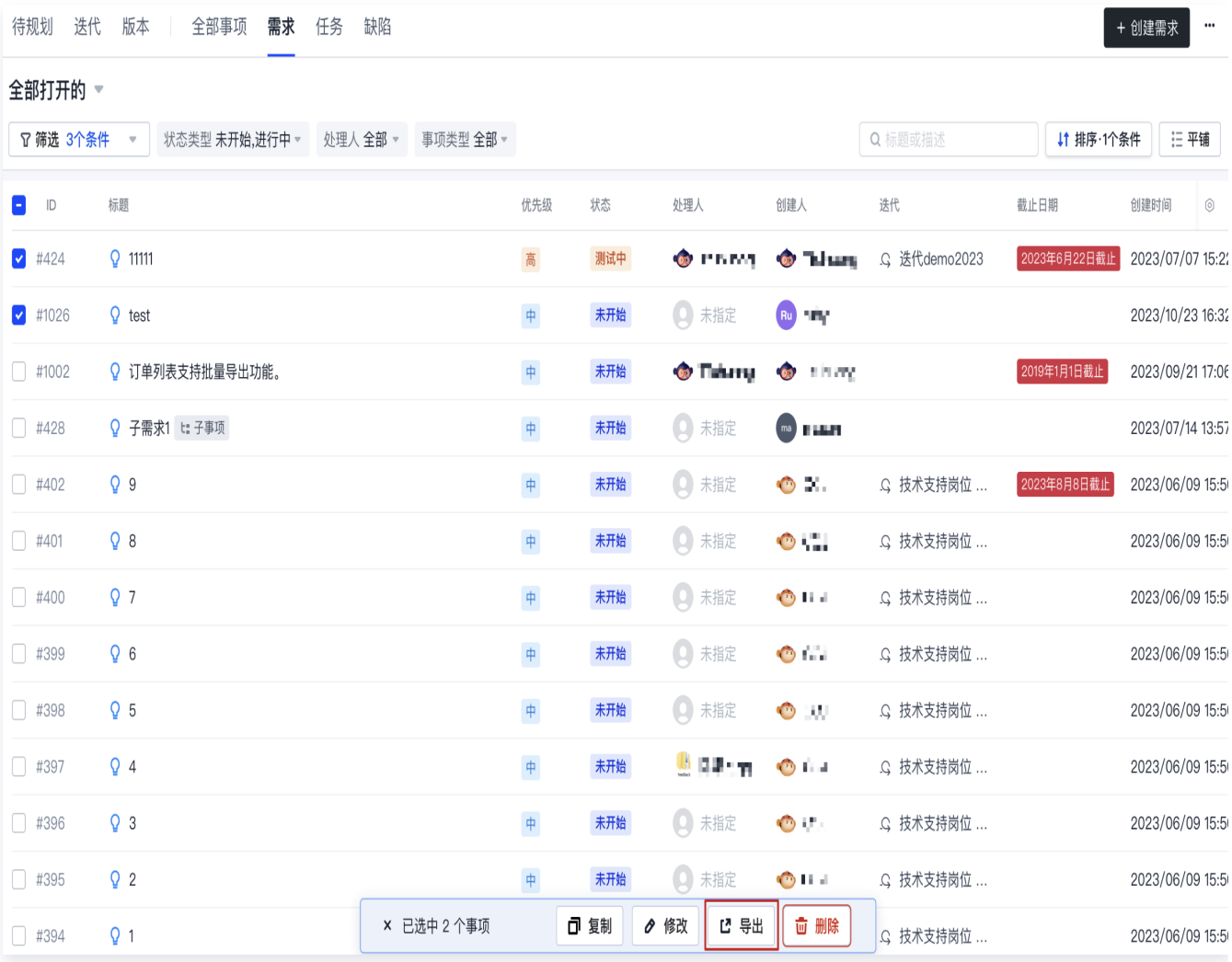
Export Issues

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.

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



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.

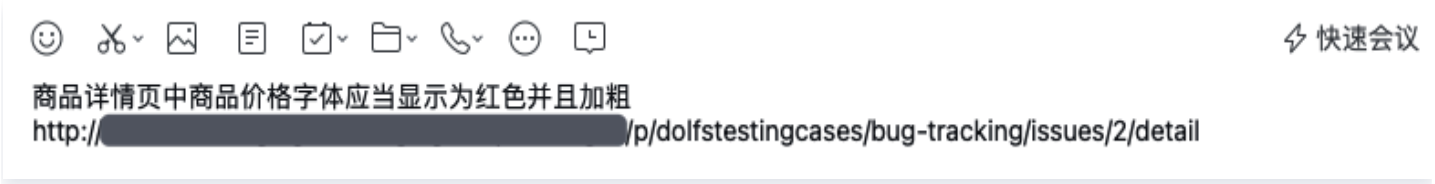
Sub-items in the parent item also support the copy operation.

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.

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.



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.

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.

Configure Default Filter

1. 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.

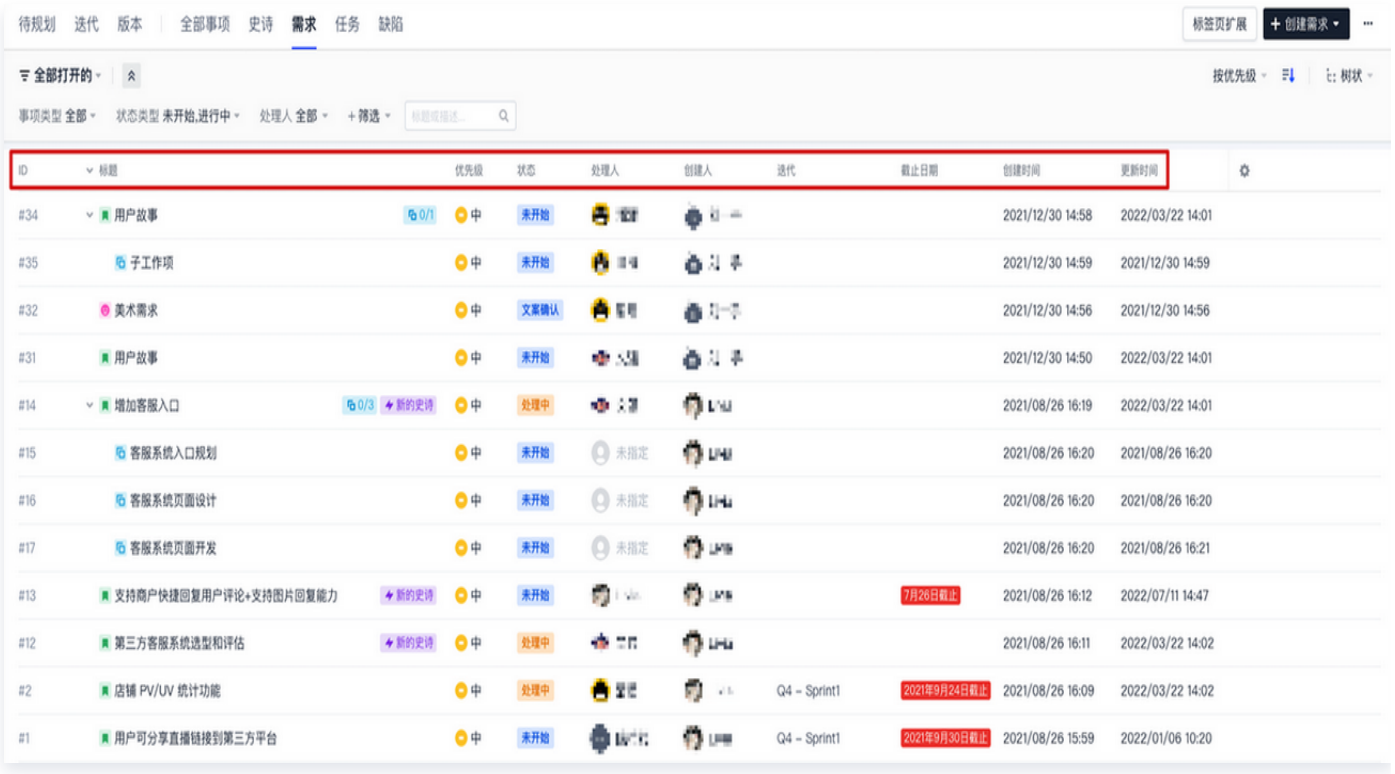
2. Through the ··· menu behind the filter conditions, you can set the current filter condition as the default filter. Modified settings will be saved, and the filter will be used by default the next time you access All Issues.

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.



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.

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

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.

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**.

Delete a custom filter

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

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

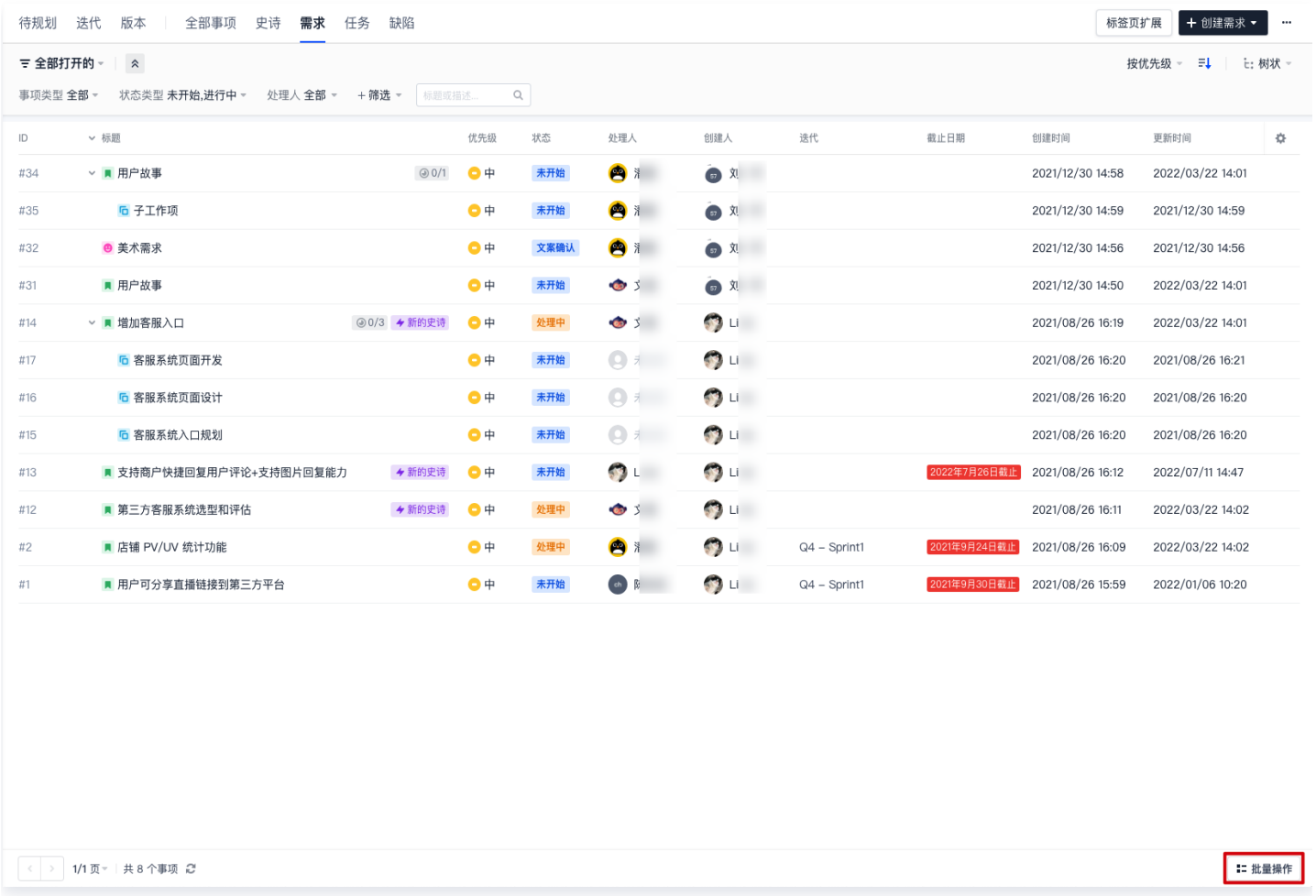
1. Log in to CODING Console and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

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:

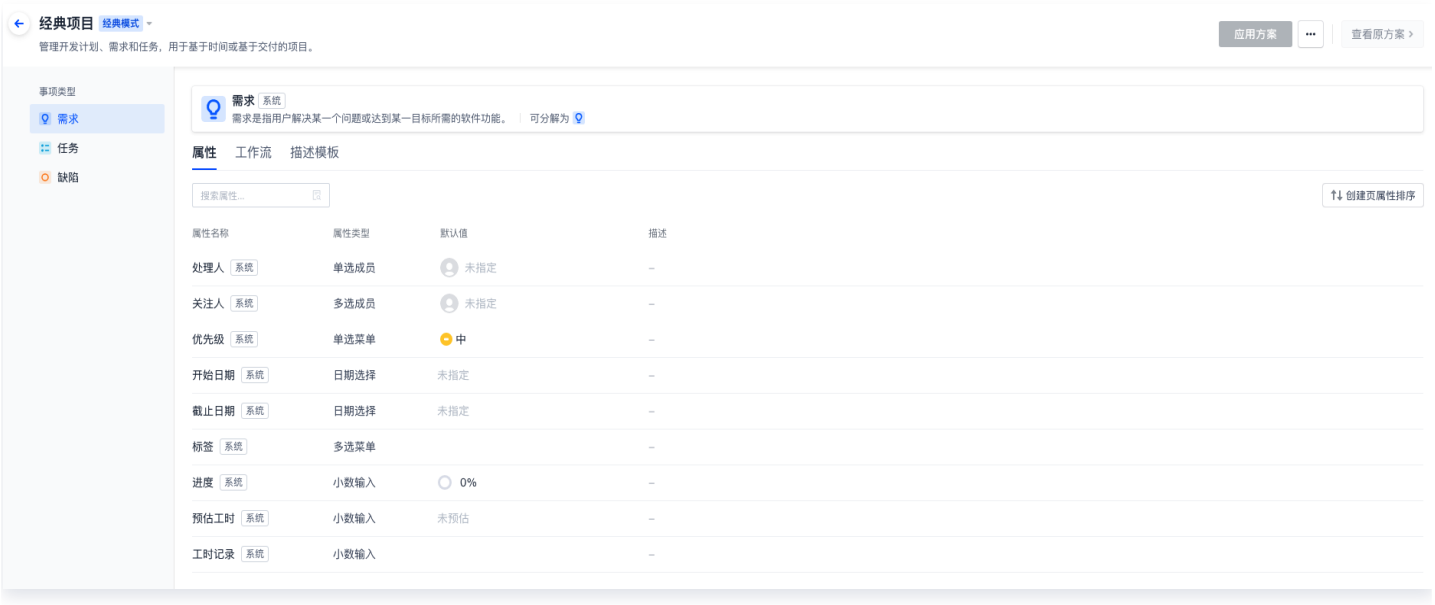
Batch Modify Attributes

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.



Change the assignee to a specified member.

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



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.

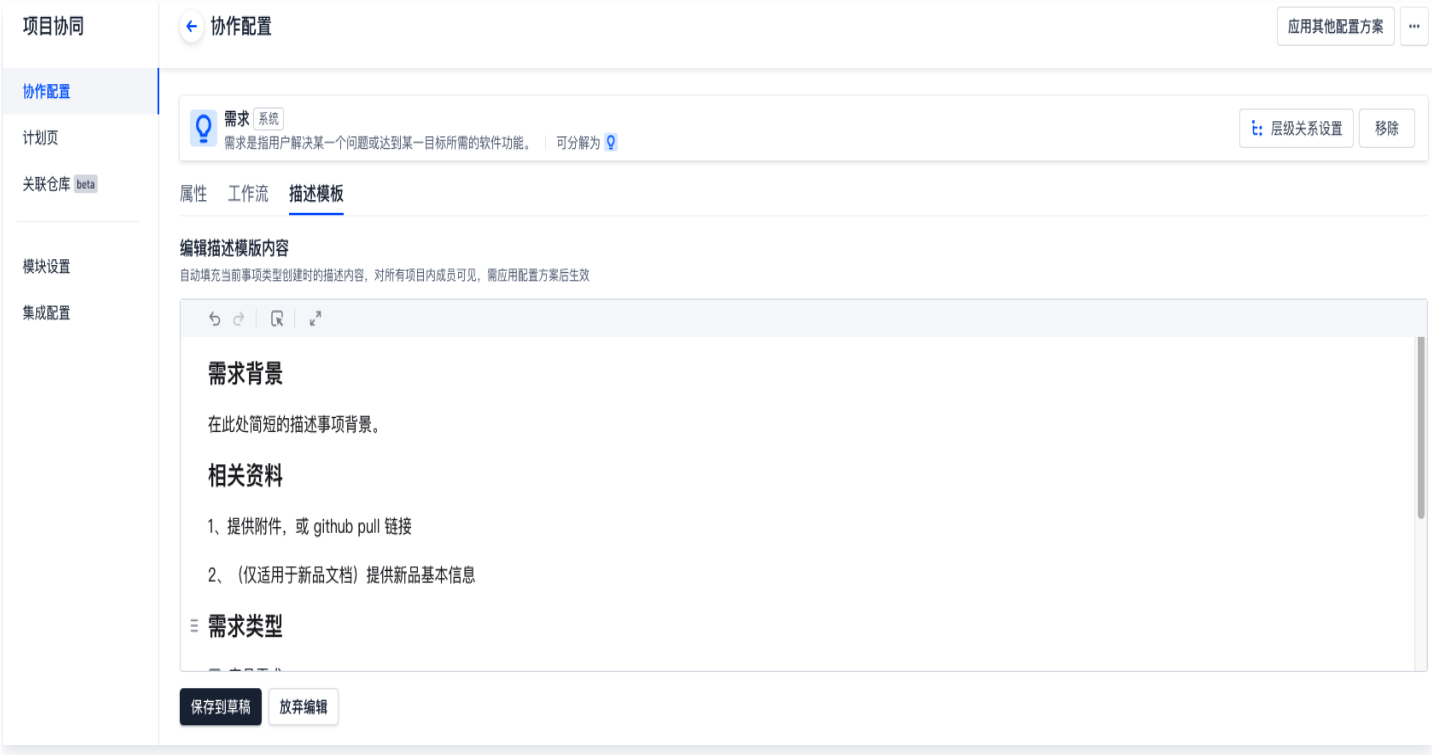
Application scenario

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

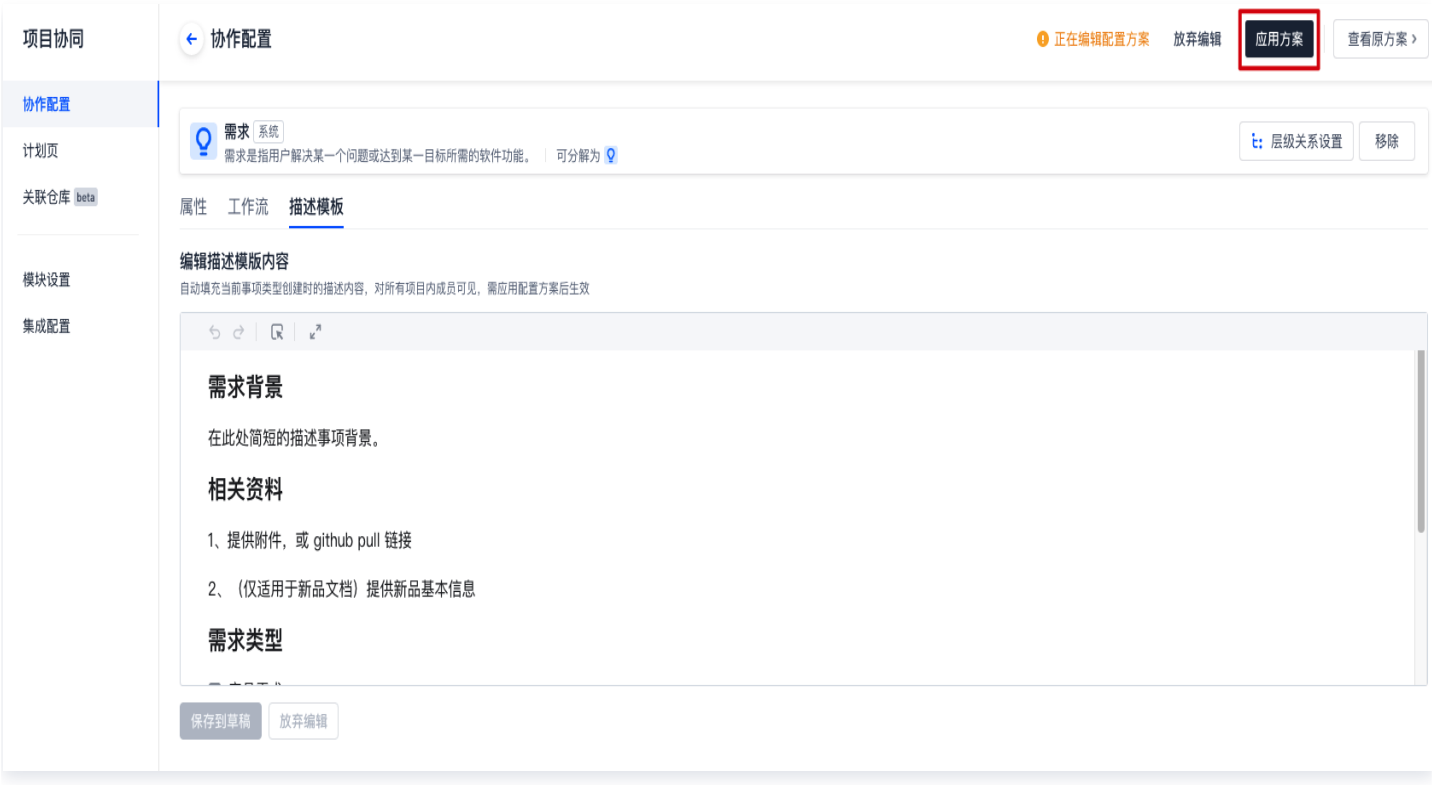
Project administrators click on **Project Settings** in the bottom left corner of the project, then select **Project Collaboration** options, and choose the type of task for which to add a description template. You can design differentiated description templates for different types of tasks to meet the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



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

Configuration Plan Management Overview

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

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

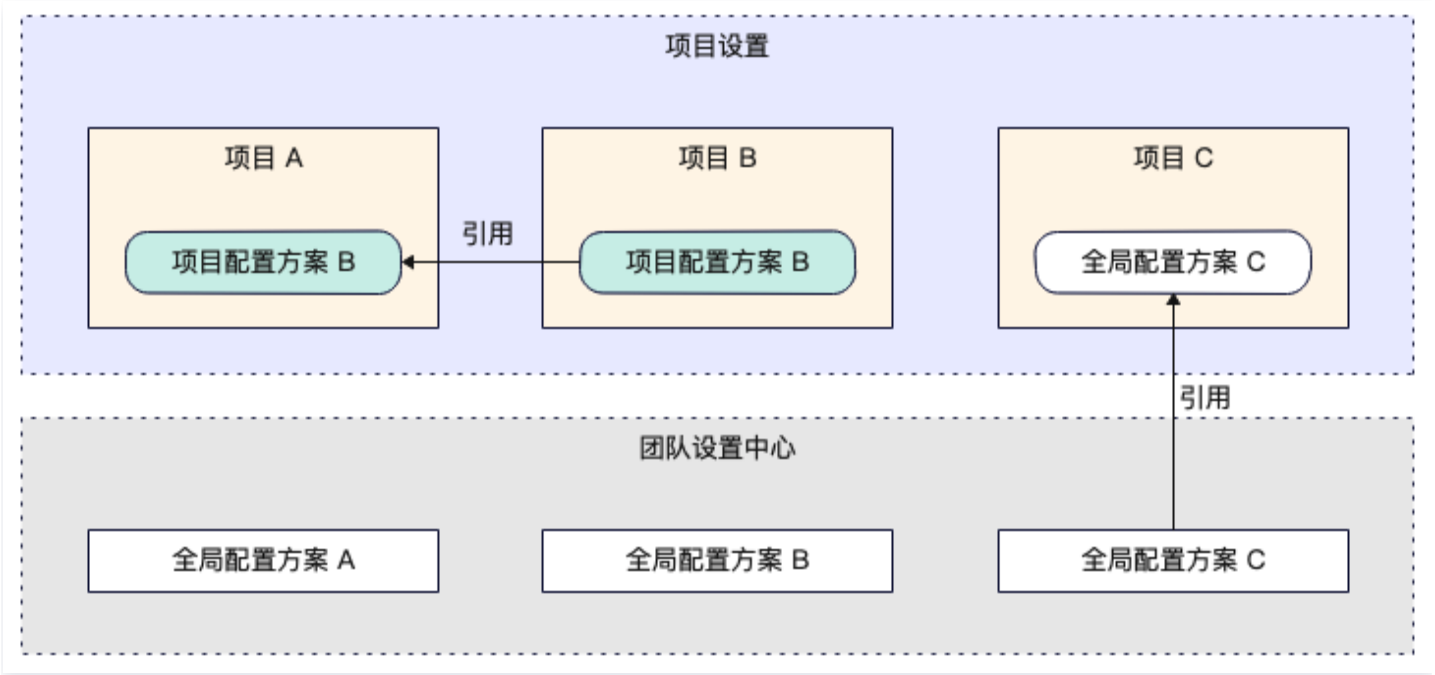
Open Project

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.

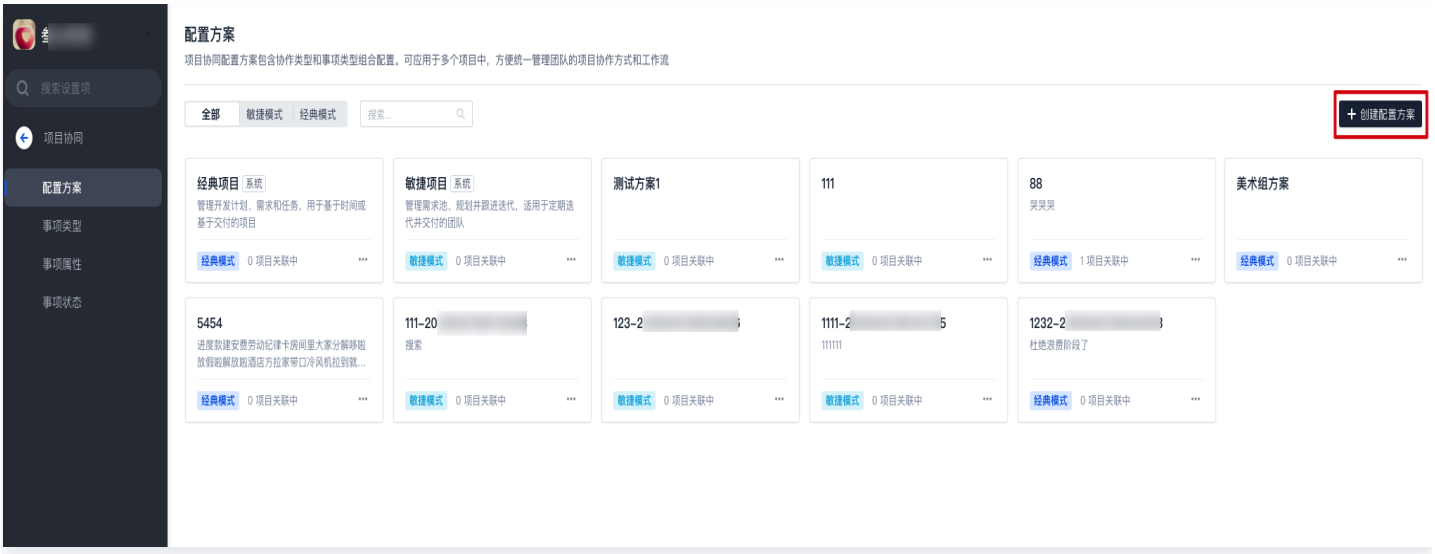
Items are the core units for team members to carry out efficient work. Different projects have different Workflow Pipelines. The **Configuration Plan** feature (hereinafter referred to as the Plan) enables quick reuse of pre-configured workflows and helps the team manage workflows uniformly.

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.

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.

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.

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.

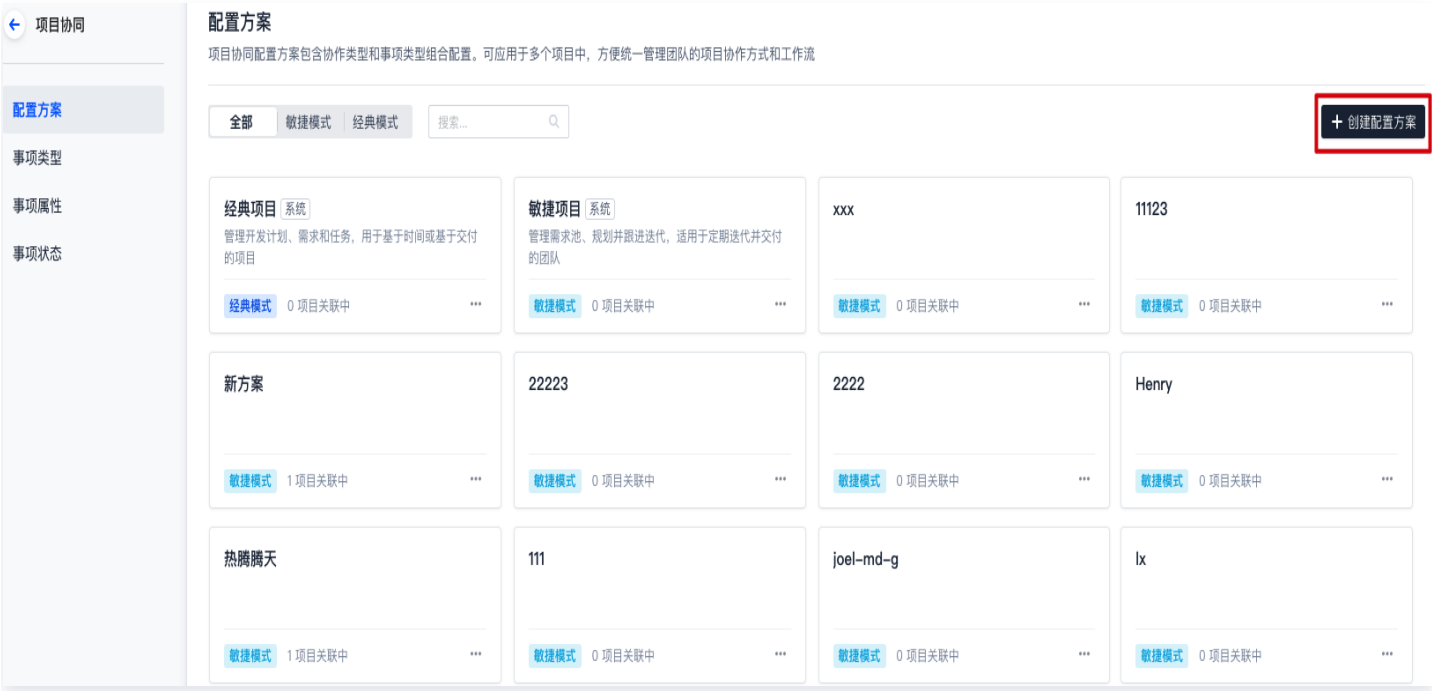
- Synchronizing a scheme means the selected target scheme is pulled into the project, establishing a master-slave relationship. Any changes made to the target scheme will automatically synchronize with the current project.

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**.

Global Plans

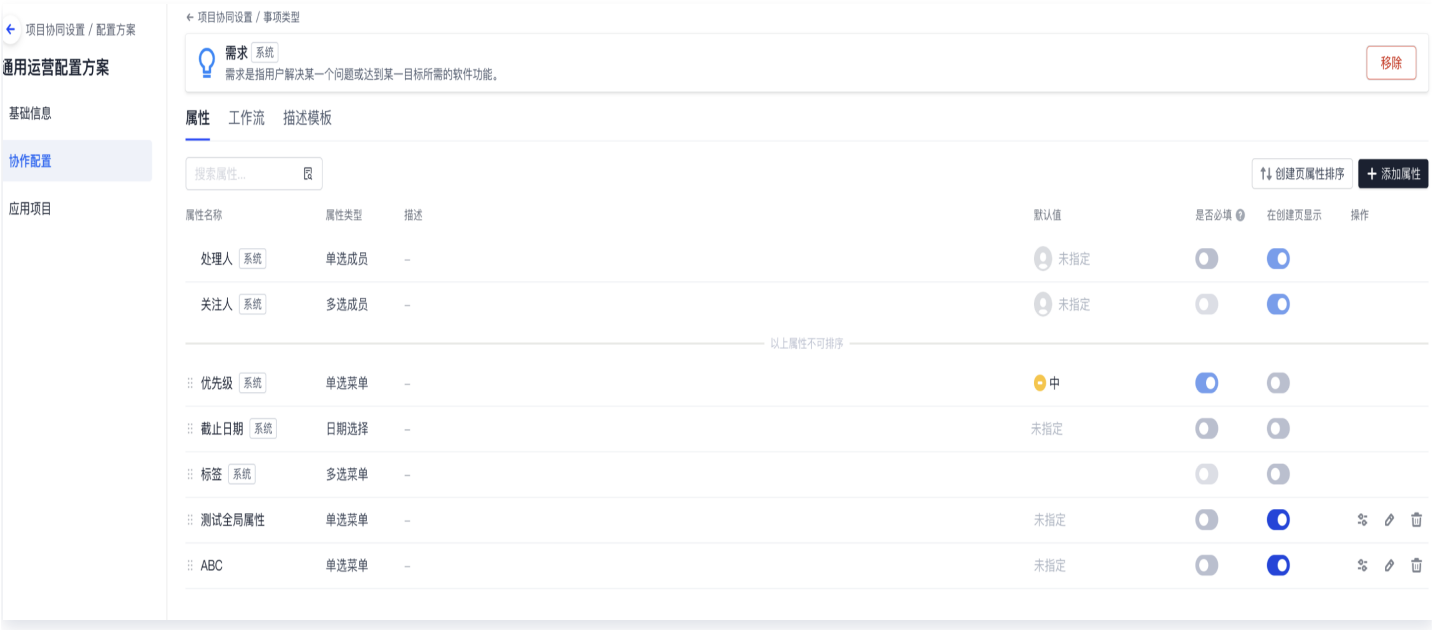
Click the **Team Settings Center** at the bottom left, then click **Feature Settings > Project Collaboration > Configuration Plan.**

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



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.

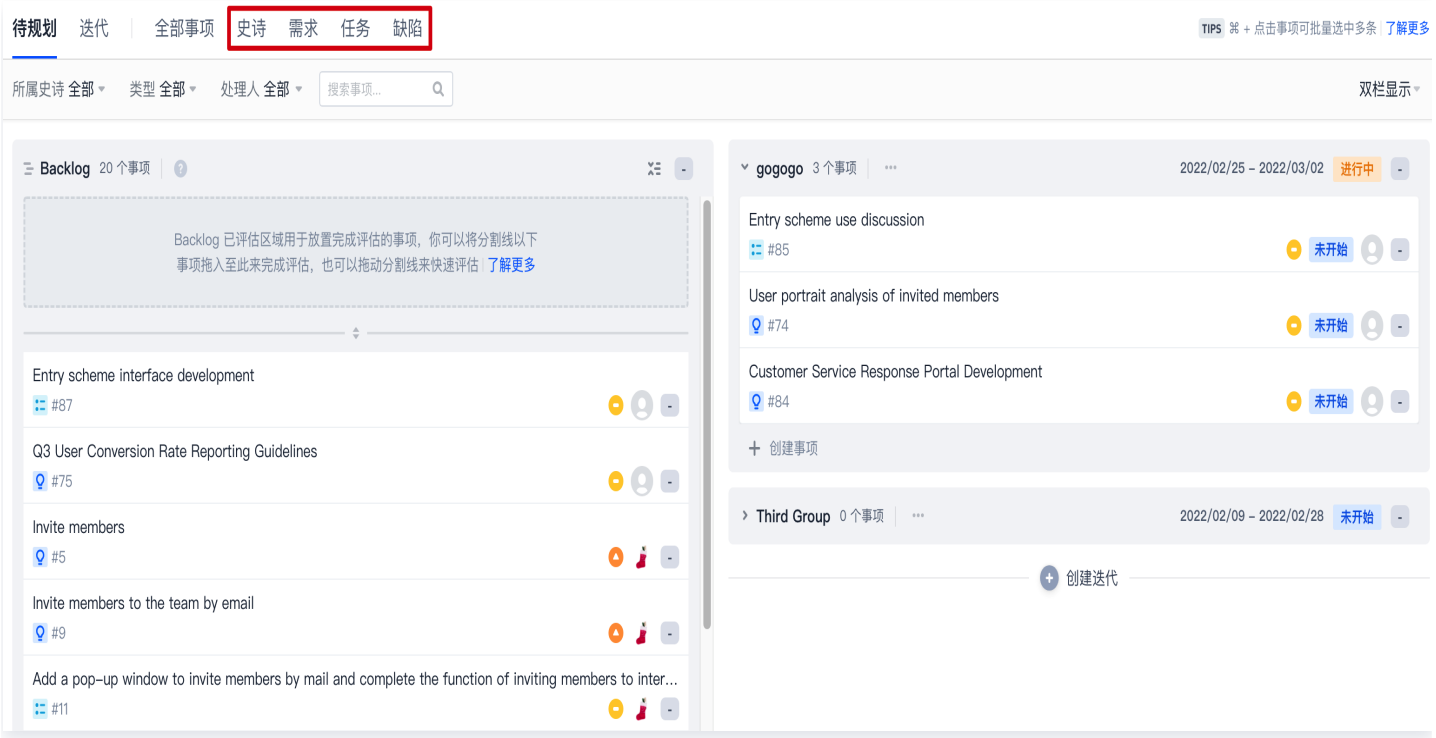


Collaboration mode

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.

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.



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.

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.

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.

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**.

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.

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.

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.

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.

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.

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.

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

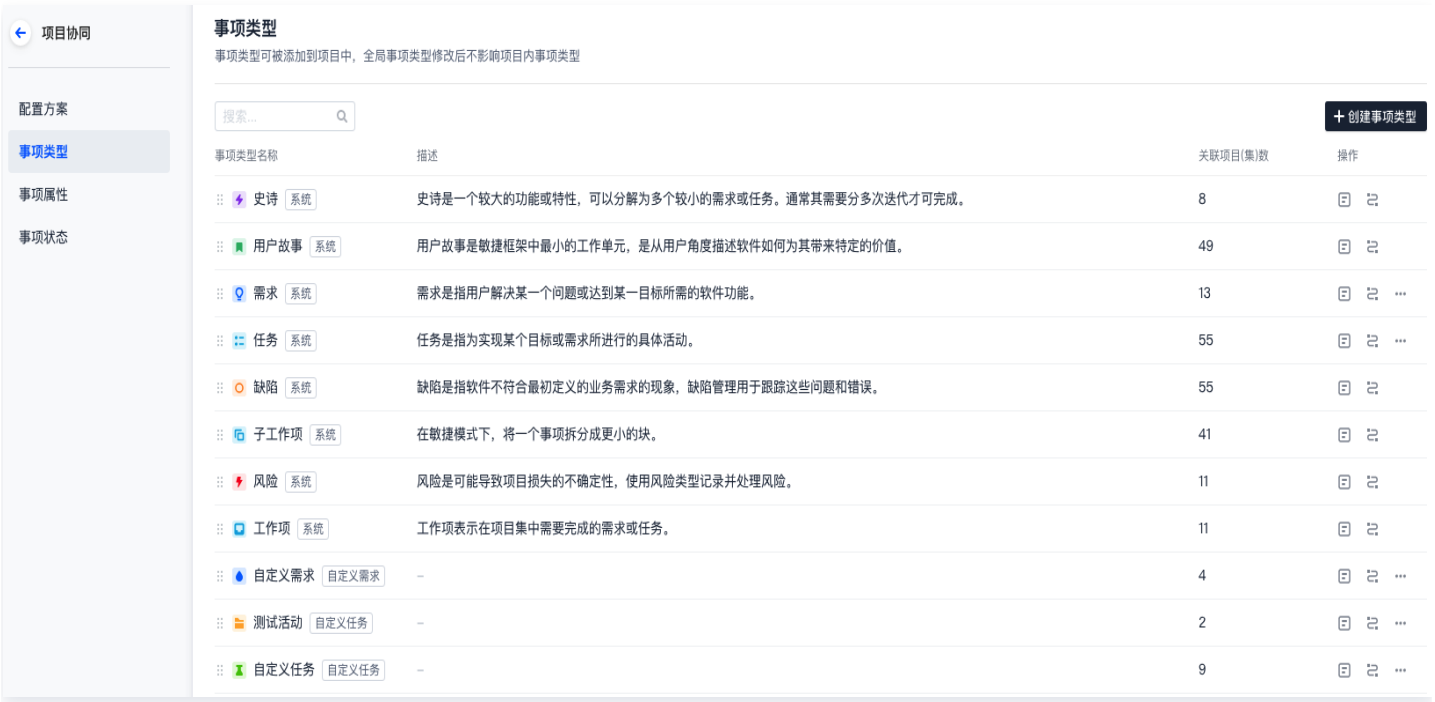
1. Log in to CODING Console and click **Use Now** to enter the CODING usage page.
2. Click **Item** on the left side of the team homepage to enter the project list page and select the target project.
3. Click the **Project Collaboration** feature in the left-hand menu.

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.



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.

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.

Issue Type Configuration

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

Hierarchy levels

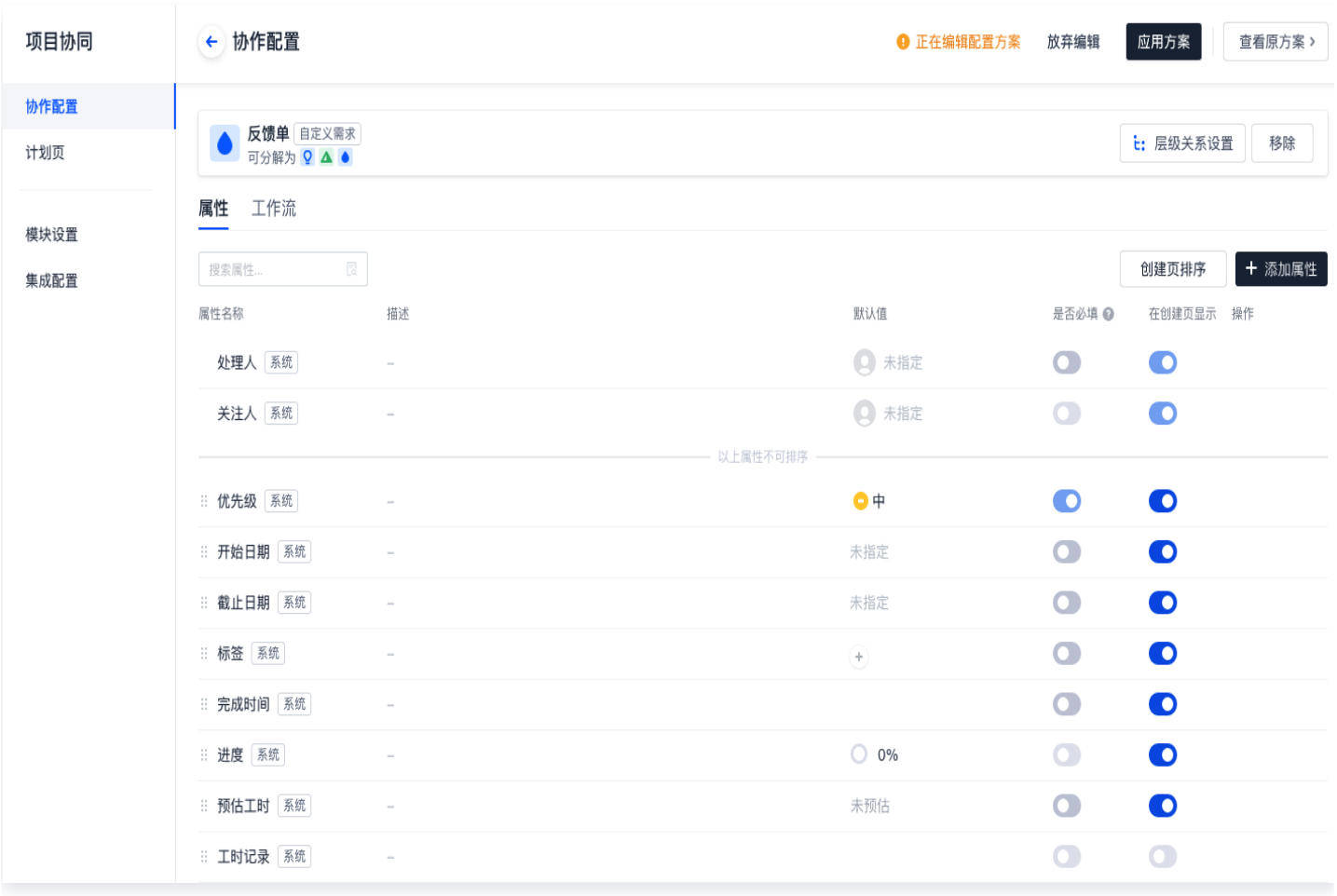
Under the classic collaboration mode, **User Stories, requirements**, and **custom-defined requirements** three types of items support setting hierarchical relationships.

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

Configure Fields

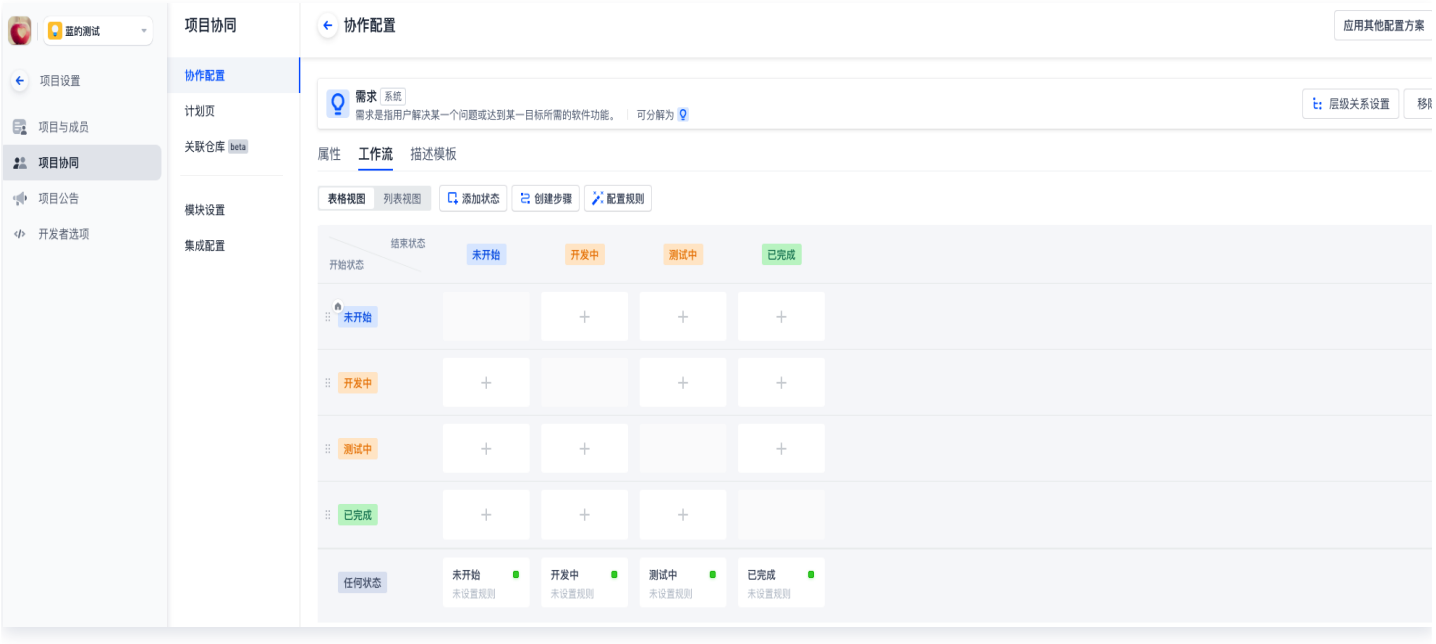
Properties can be understood as an item's **description information**, used to quickly explain the current status of the item, deadlines, handlers, priority, etc. Adding properties will be displayed on the detail page when creating an item, and can also be used as units in the search box and filter bar.

For more details, see custom-defined item properties.



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.



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.

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

Create field

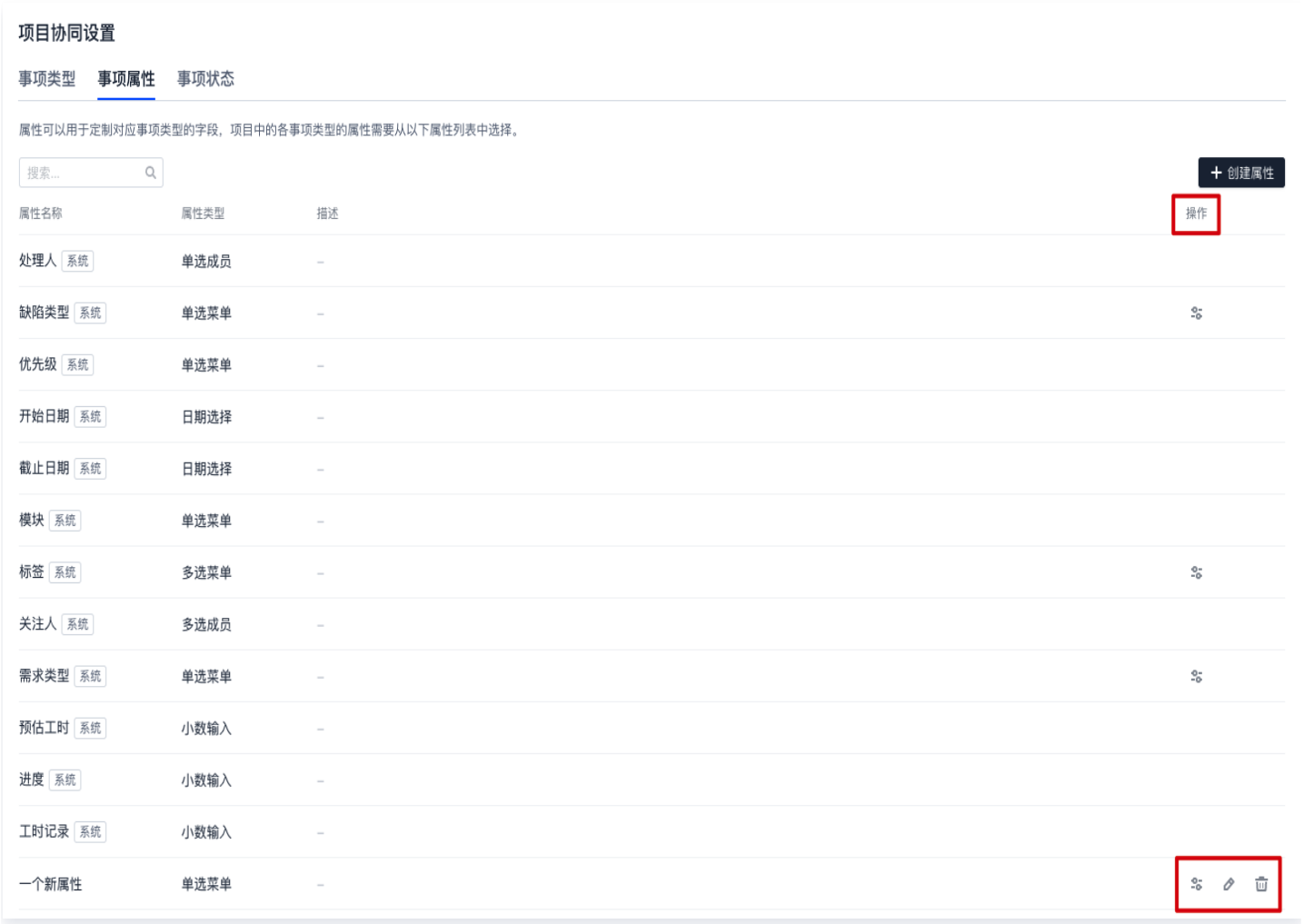
Fields are divided into system fields and custom fields. Click **Create Field** in the upper-right corner of the issue field settings page and choose from various built-in field types according to project needs.

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.



Project Field Configuration

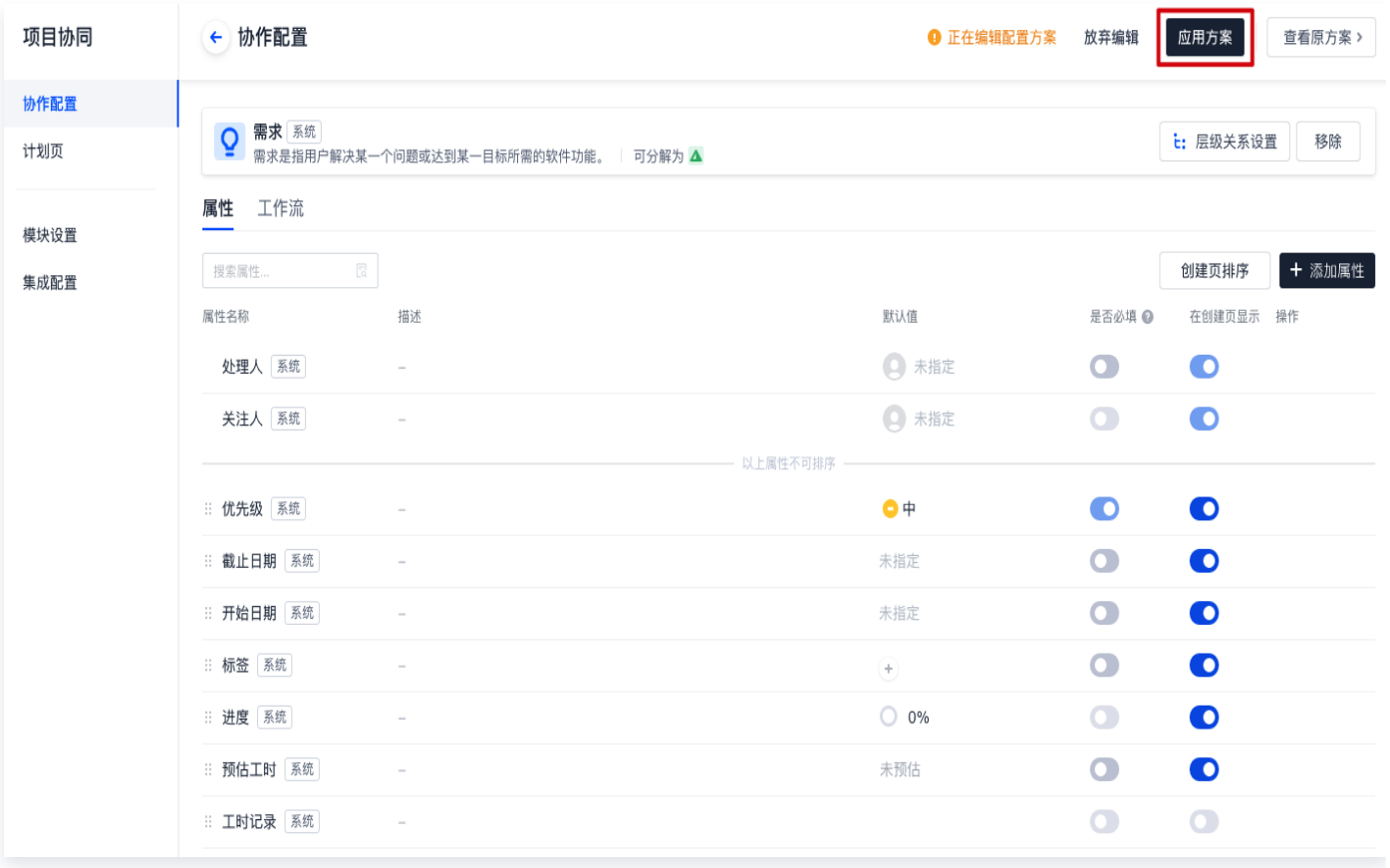
Project field configuration only applies to a single project.

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.

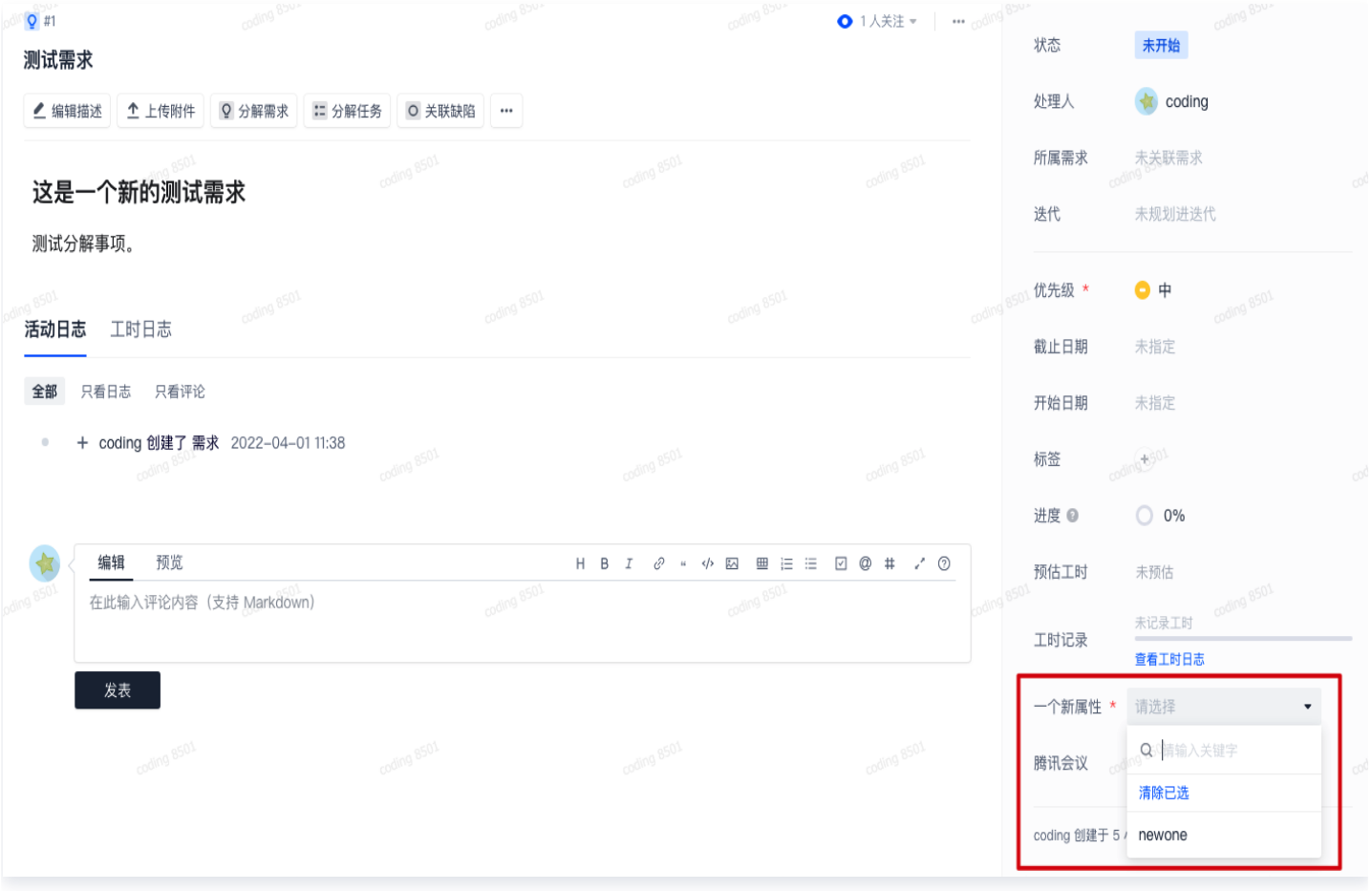
3. You can adjust the display priority of properties by dragging them up or down based on team and project needs, set default values, toggle the mandatory restriction on or off, and display them on the creation page. Furthermore, you can configure the property menu or delete properties in the **Operation**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

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



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.



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**.

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.

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.

Set steps

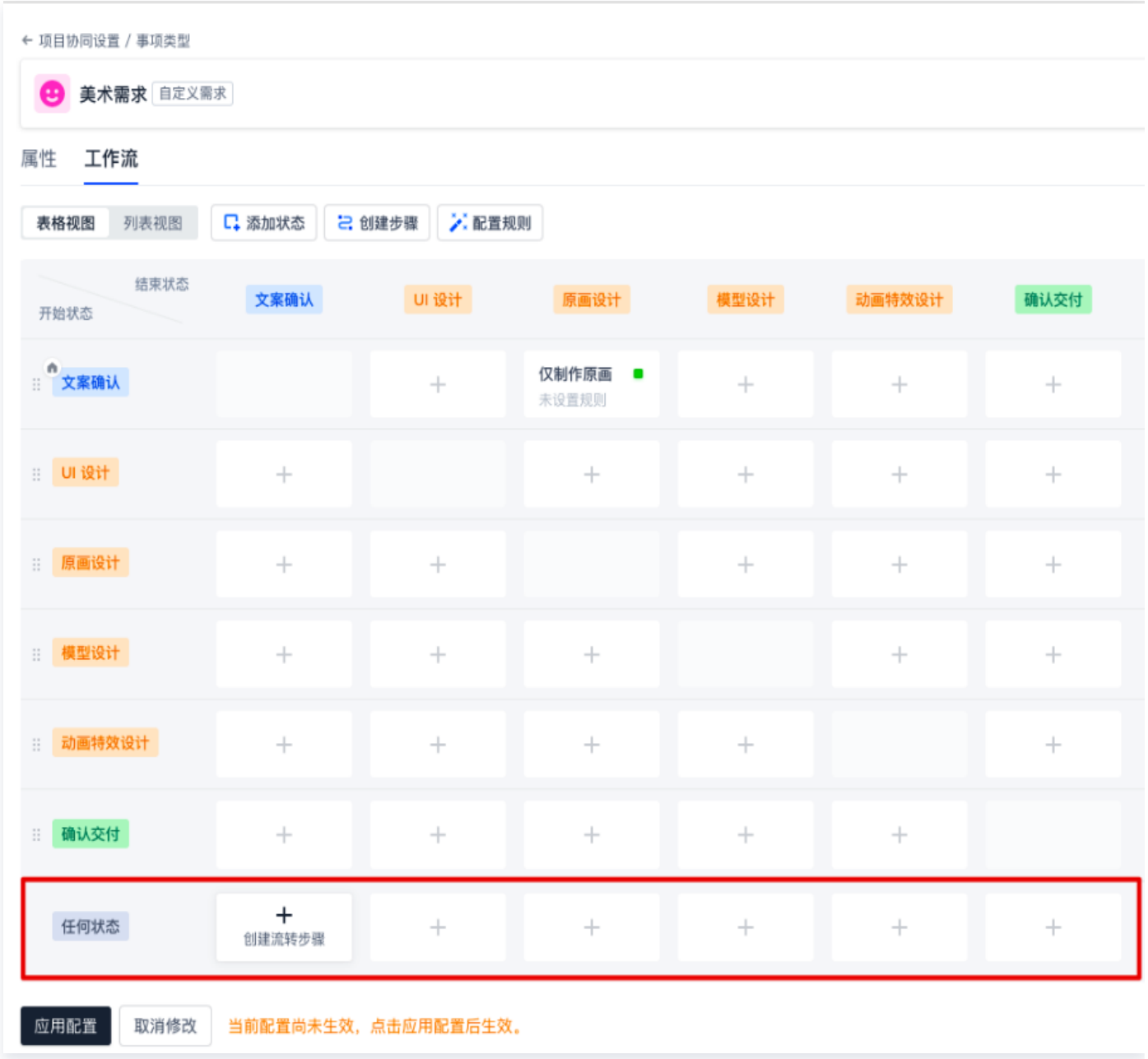
A transition shows the transition process from an initial status to a target status.

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.

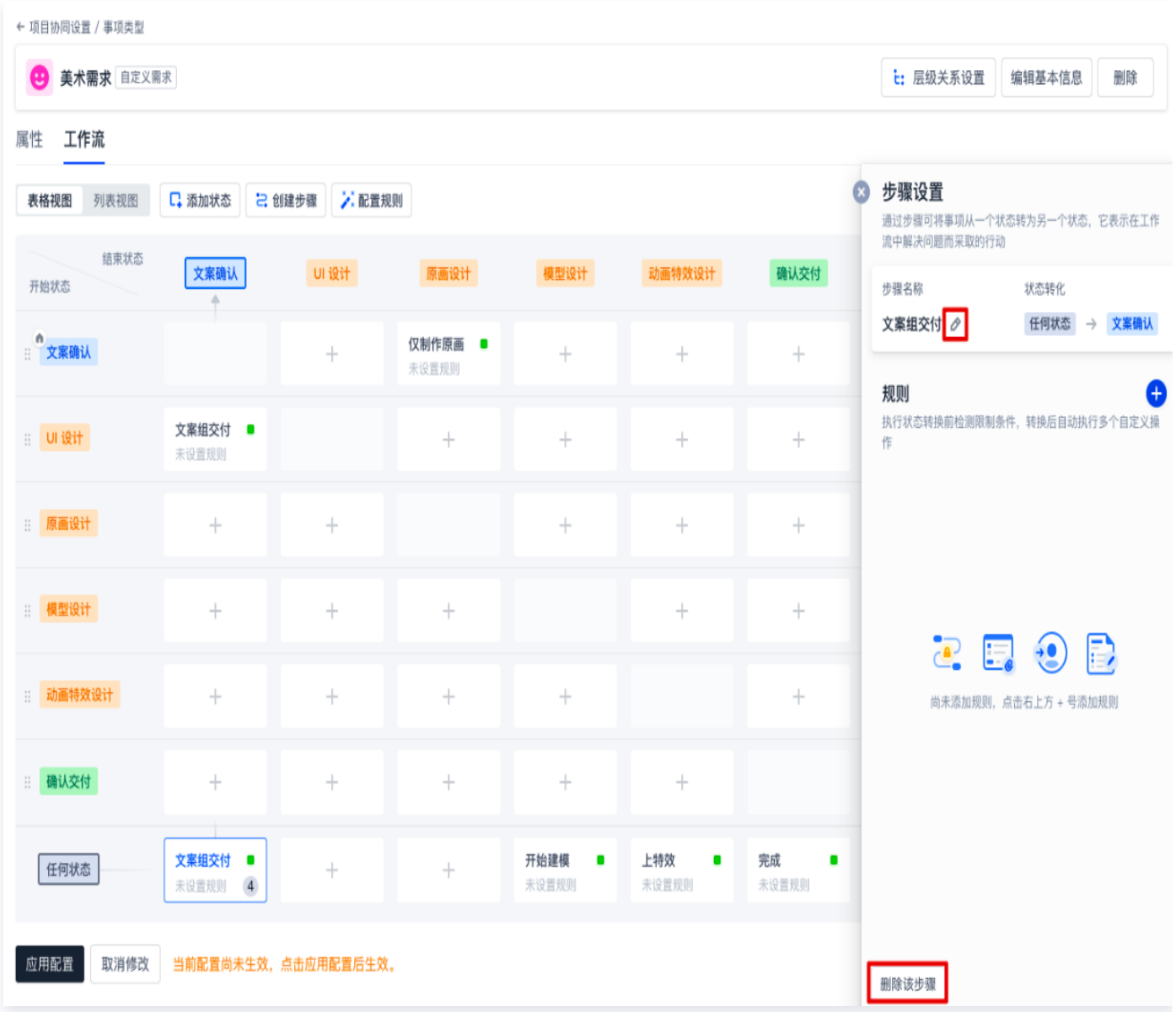
3. You can also directly create transition steps in **any status** column, where the **start status** and **target status** are fixed by the table’s horizontal and vertical alignment of the states, and only the **step name** can be modified.



Note:

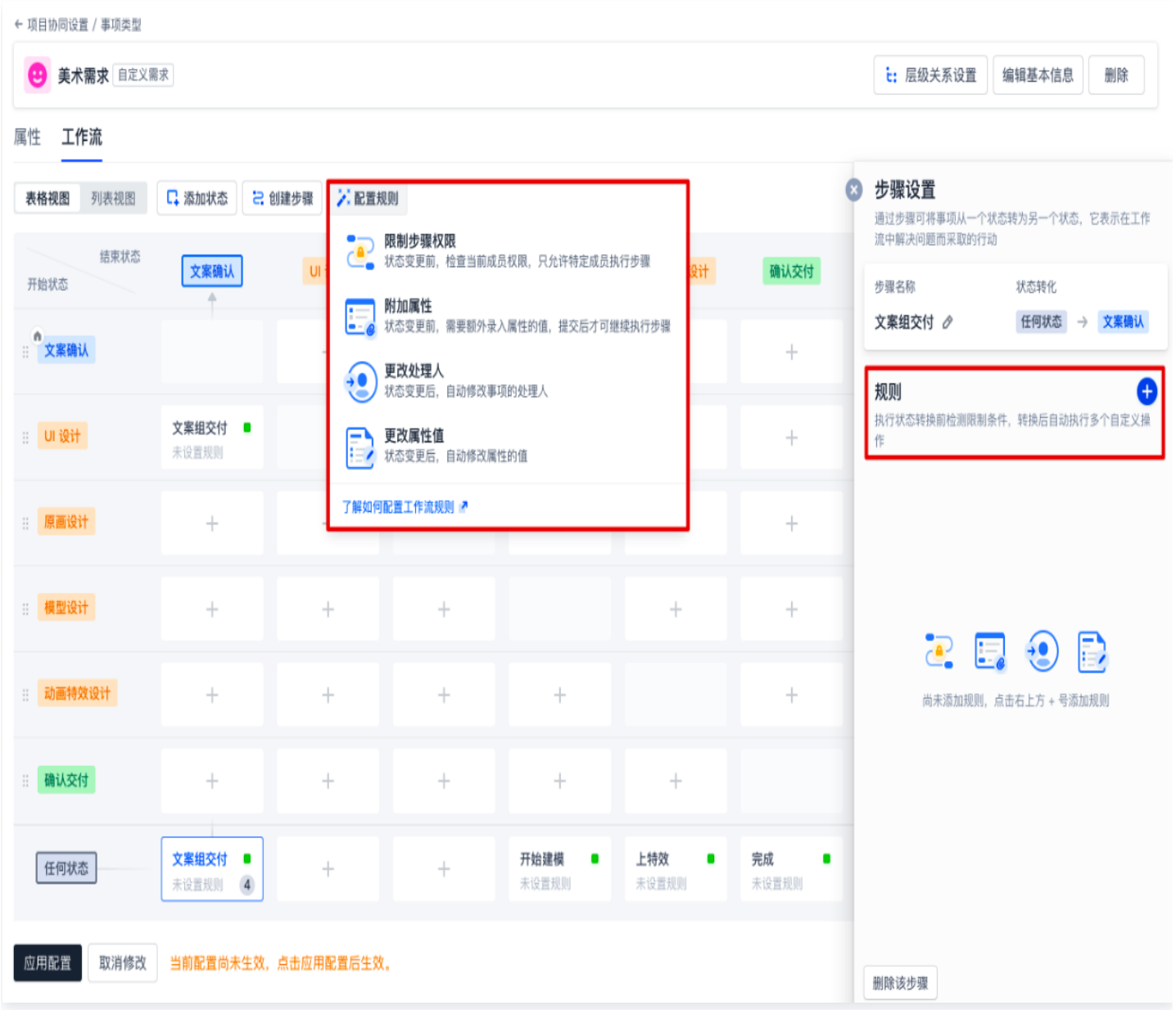
When setting steps, be mindful of conflicts. As shown, since any status can transition to **Copy Confirmed** status, it overrides other individual steps to the **Copy Confirmed** status, only the **Any Status > Copy Confirmed** step is effective.

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.



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.



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.

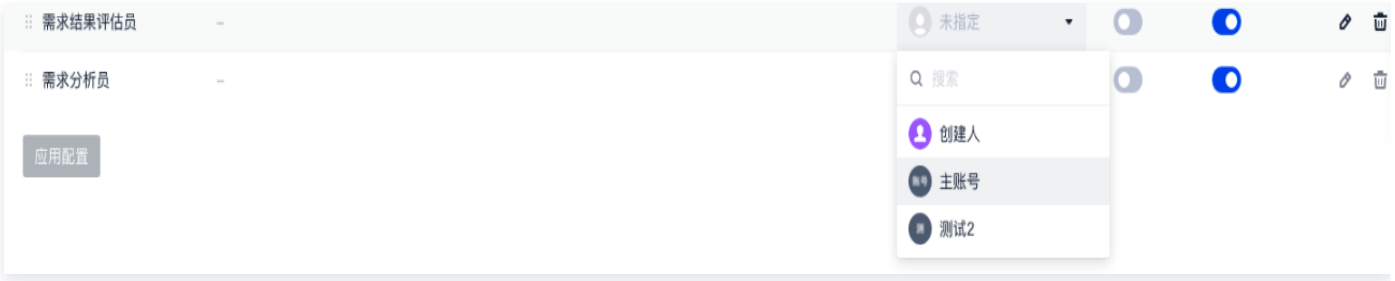
Change assignee

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**.

2. Designate team members who can act as evaluators.



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.

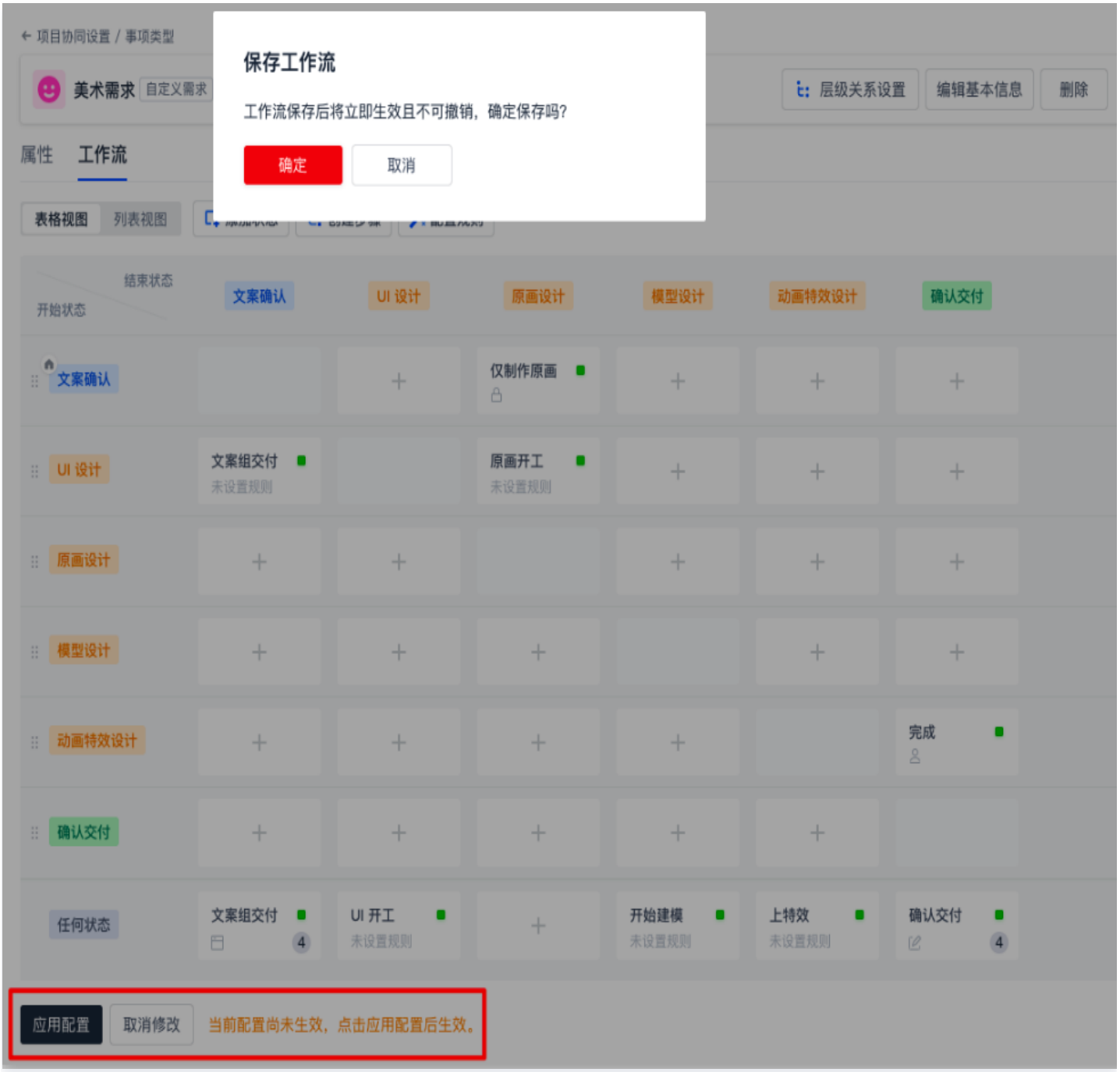
Workflow view

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.

- 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.

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



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.

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.

> **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.

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

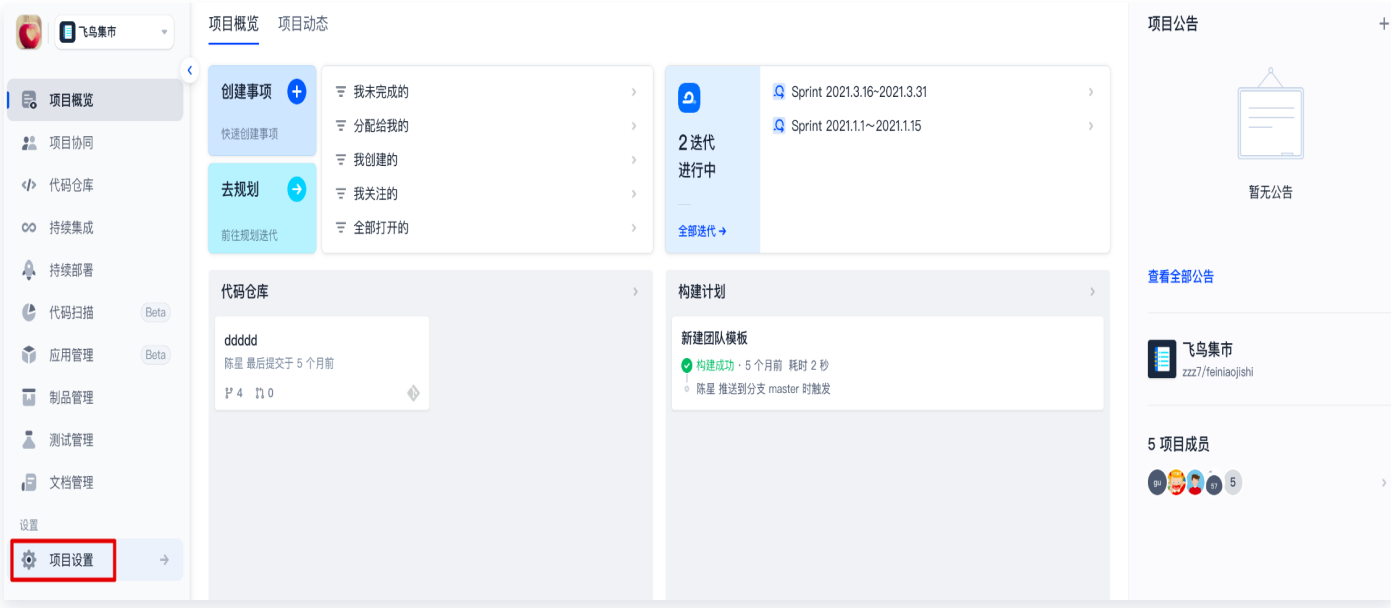
1. Log in to CODING Console and click **Use Now** to enter the CODING usage page.
2. Select **Projects** in the navigation bar and click **All Projects** to select and enter the target project.

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.

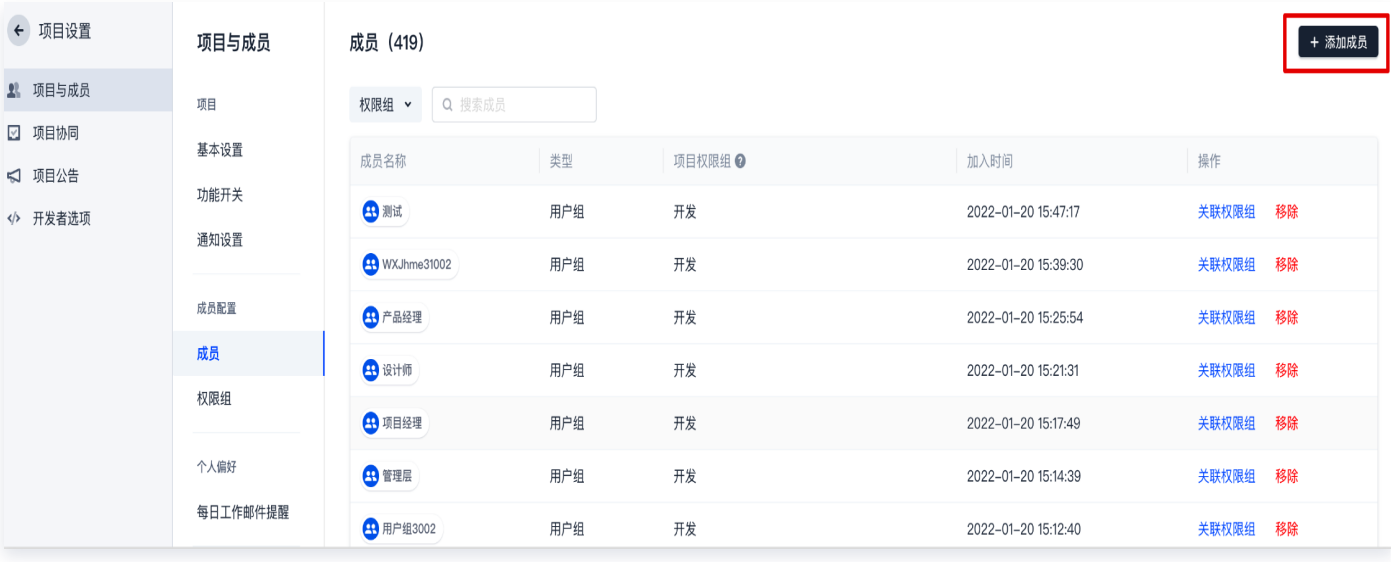
- CODING consolidates project permission groups in the Team Settings Center for configuration and management, and permission group configuration is not supported within a single project. For more details, refer to Configuring Project Permission Schemes.
- To learn how team leaders/admins can centrally 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.

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.

Project Settings

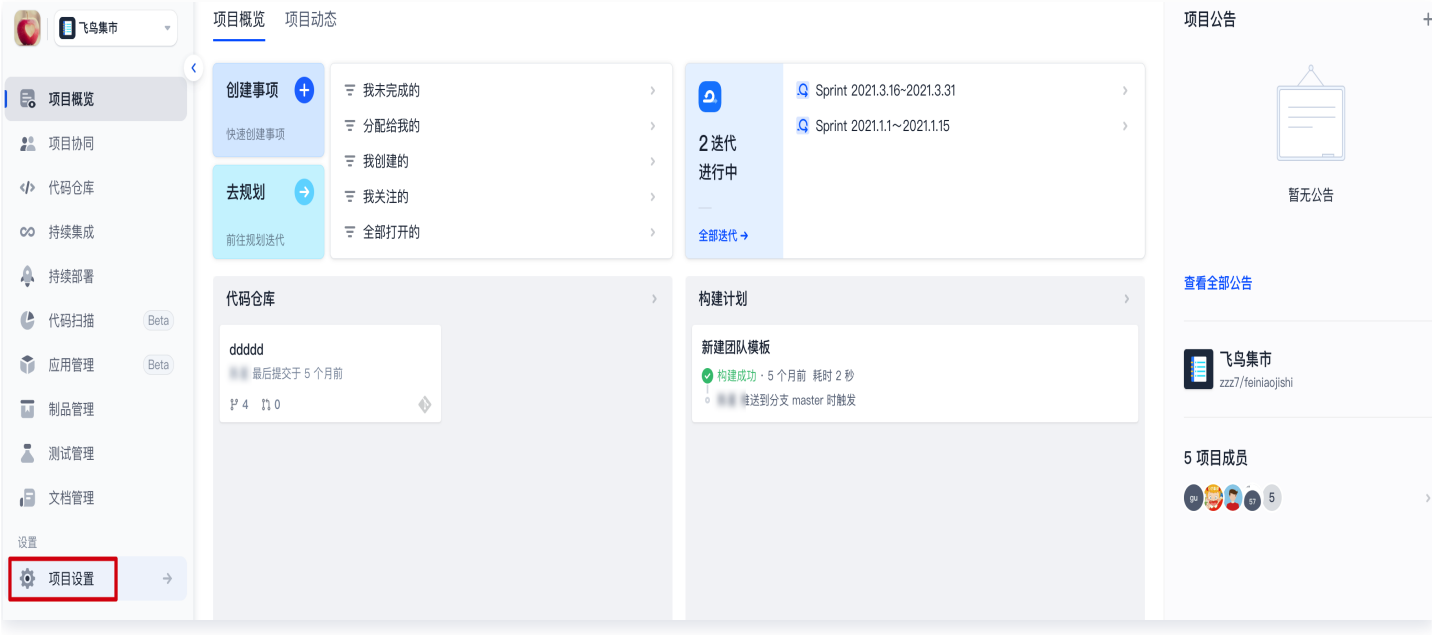
Last updated: 2024-09-05 16:28:58

This document describes how to manage project settings in CODING.

Open Project

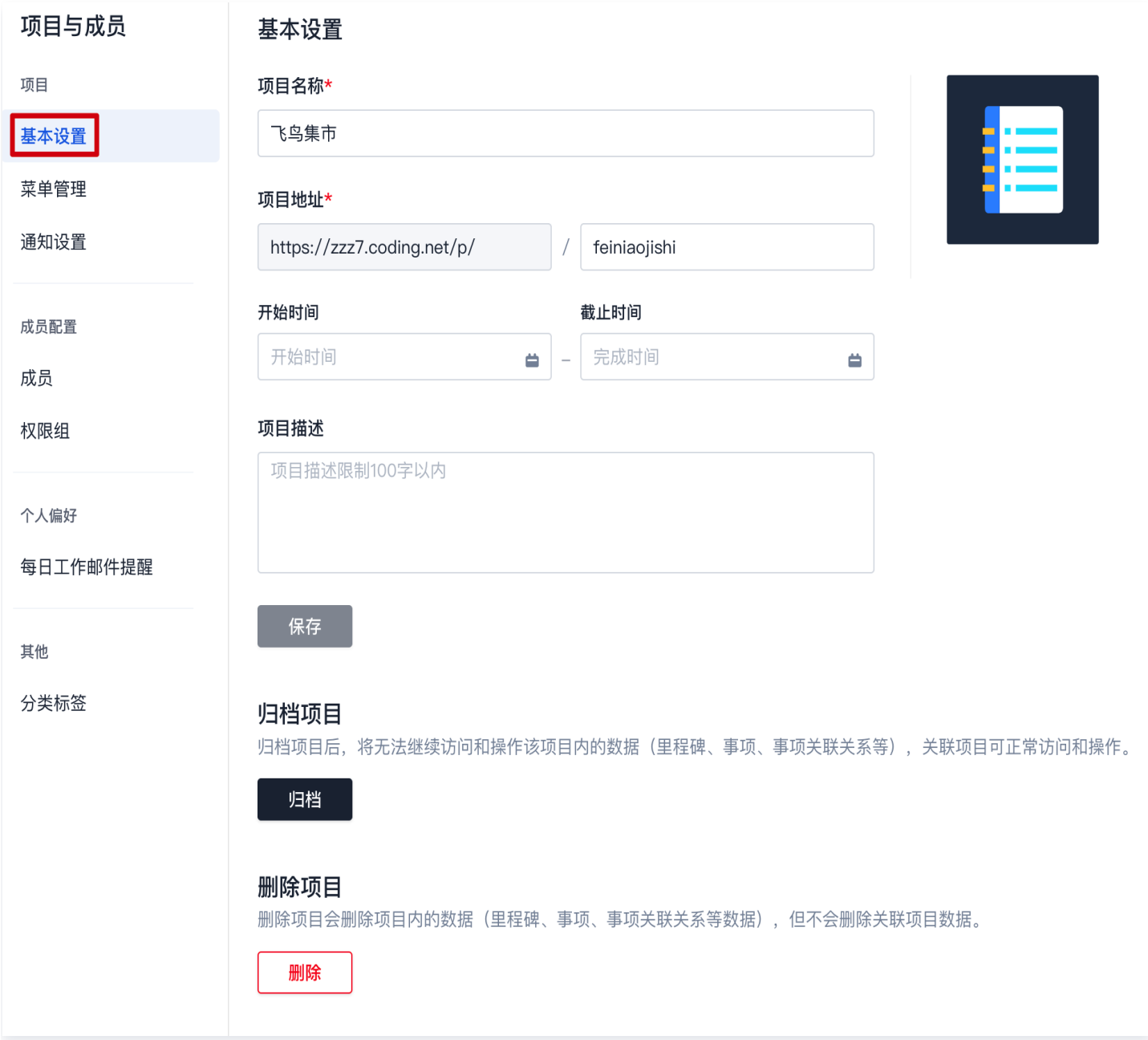
1. Log in to CODING Console and click **Use Now** to enter the CODING usage page.
2. Click **All Projects** in the upper-right corner of the page, select and enter the target project.

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.



Note:

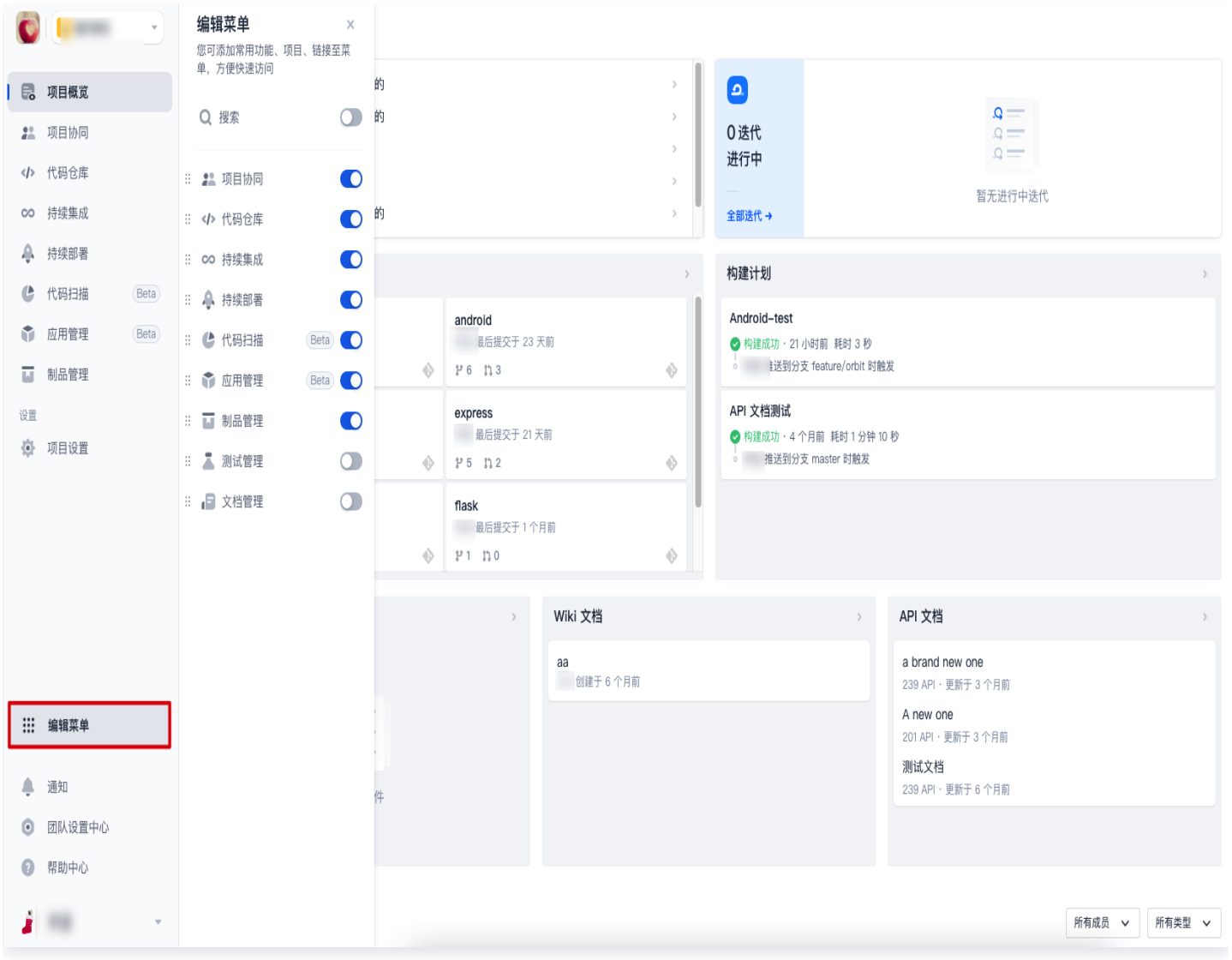
Modifying the project's address will change the project's access URL (including the Git repository URL), rendering any previous URLs invalid. Git Repository Address Modification Method:

```
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.

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

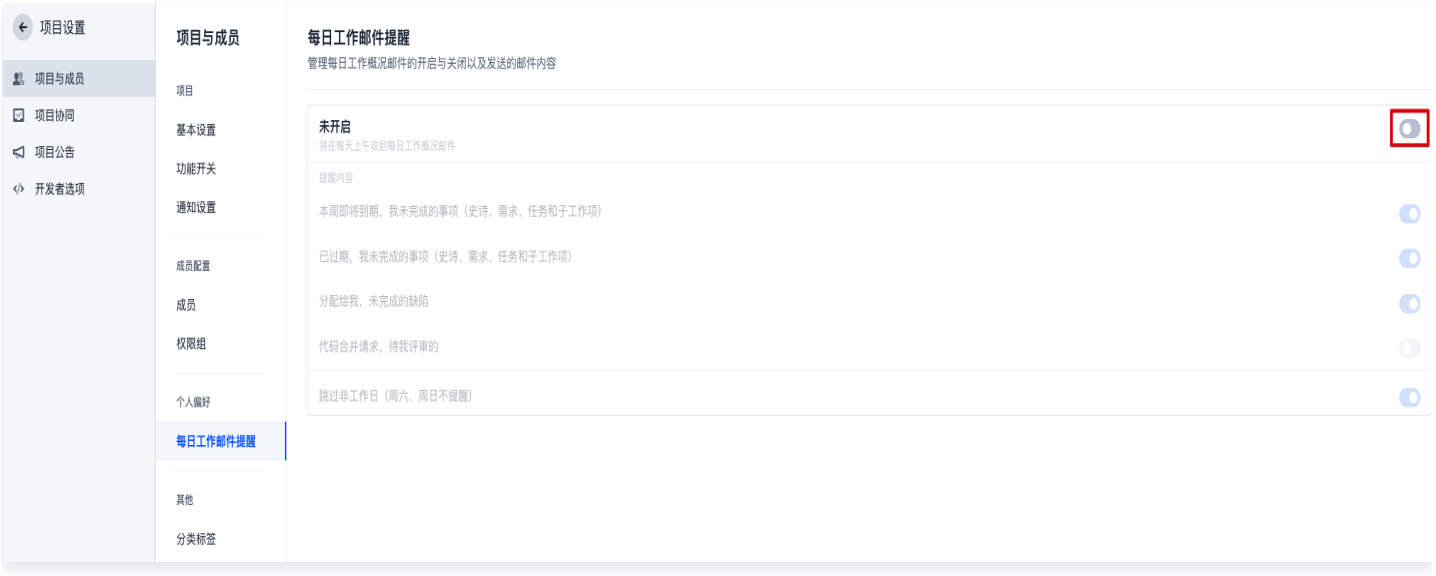
The types of notifications members can receive depend on the notification settings within the project. The Project Administrator can click **Notification Settings** in the Project Settings to adjust the recipients of different types of event notifications.

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.



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

CODING CLOUD DEVELOPMENT 一站式软件研发管理平台

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，如果有疑问，请联系我们：enterprise@coding.net

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.