

# Project Management

## Unfuddle Manual

<http://swisstimex.ch>

1.11.2009

v. 1.0

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Swisstimex



# Scope of this document



**This guide will help the Swisstimex development team to:**

- **Manage Project Master Data**
- **Manage Project Milestones**
- **Manage Requirements**
- **Manage Defects**
- **Manage Tasks**
- **Manage Project Messages**
- **Manage Project Wiki**
- **Manage Project Members**
- **Manage Repository**

# Introduction

Swisstimex



Unfuddle is a secure, hosted project management solution for software development teams.

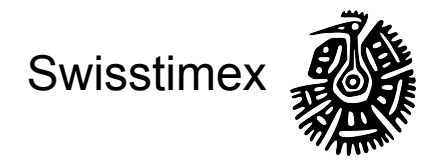
Work on many different projects and manage each of them from within a single account.

Each project has its own:

- Dashboard
- Messages
- Set of tickets
- Milestones
- Notebooks
- Subversion repositories

You can define different permission for each person in your account on a per-project basis

You can backup and archive the projects



**Login**

# Sign In



- 1) Browse to : „https://domain.unfuddle.com“
- 2) Set your „Username“
- 3) Set your „Password“
- 4) Select the „Remember Me“ flag
- 5) Click „Sign In“ button

A screenshot of the Swisstimex sign-in interface. The form is titled "Swisstimex Sign In" and is enclosed in a yellow rounded rectangle. It features two input fields: "Username:" and "Password:". To the right of the "Username:" field is a link that says "Use OpenID". Below the "Password:" field is a link that says "Password Reminder". To the right of the "Password:" field is a checked checkbox labeled "Remember Me" and a "Sign In" button.

## Remarks

If you need an account, please send following information:

- Name
- Surname
- Email
- Project Name

to:

# Password Reminder



- 1) Click "Password Reminder" link
- 2) Enter your "Email" address
- 3) Click "Submit" button
- 4) An email will be sent to your account
- 5) Sign In

### Swisstimex Sign In

[Use OpenID](#)

**Username:**

**Password:**

[Password Reminder](#)  Remember Me

### Password Reminder

Please enter your email address.

A new welcome email will be sent to your address with detailed information on how to sign in to your Unfuddle account.

**Email:**

4

Emails have been sent to your account for your corresponding projects. Please reference those emails for instructions on how to sign in.

### Swisstimex Sign In

[Use OpenID](#)

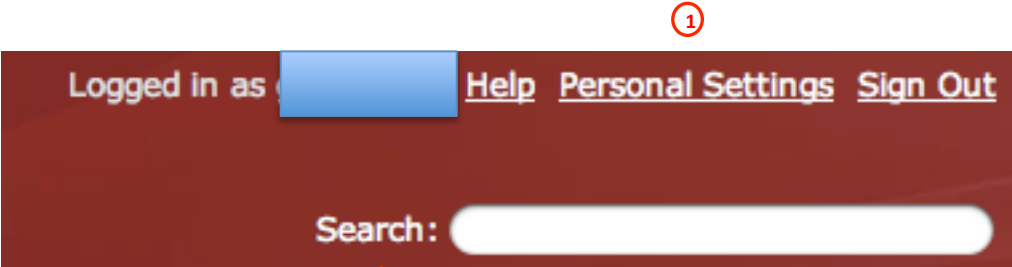
**Username:**

**Password:**

[Password Reminder](#)  Remember Me

# Change Password

- 1) Click "Personal Settings" link
- 2) Enter your new "Password"
- 3) Confirm your Password
- 4) Click "Save Changes" button



## Personal Settings

### General

Your name will appear next to any messages, milestones or tickets for which you are responsible or to which you have contributed.

First Name:

Last Name:

Email:

Username:

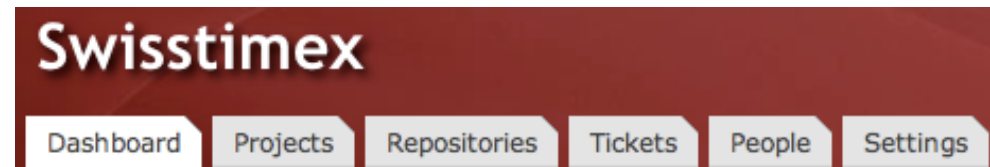
Password:  ②

Confirmation:  ③

[Save Changes](#) or [Cancel](#) ④

## Account Tabs

Swisstimex



### **Dashboard**

The Dashboard is the hub of information for all project. In just a glance, you and your team can easily see any recent changes to the source, messages, tickets and any upcoming or late milestones.

### **Projects**

The collections represents all projects within the account to which the requesting person has access. The project instance contains very basic, high level information about a project.

### **Repositories**

Each account can have any number of subversion repositories associated with it. These repositories can then be associated with any number of projects.

### **Tickets**

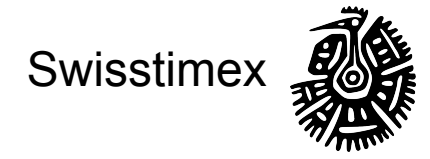
With the tickets report you can select the tickets by project, create a new standard report or export the tickets as cvs file.

### **People**

The collection represents all people within the account. When creating a new person, an invitation email will automatically be generated to the provided email address.

### **Settings**

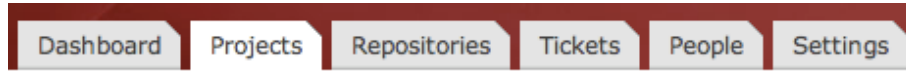
In this place you can change the account plan and billing information.



## **Project Management**

# Create a Project

- 1) Select "Projects" tab
- 2) Click "New Project" link
- 3) Edit project "Title"
- 4) Edit project "Short Name"
- 5) Define subversion as repository type
- 6) Define project theme colour



## Projects <sup>①</sup>

<sup>②</sup> [New Project](#)

### Active Projects

## Projects

[New Project](#)

### New Project

**Title:**  <sup>③</sup> **Initial Repository Type:**  <sup>⑤</sup> [What is the difference?](#)

**Short Name** (used in project URLs, no special characters or spaces):  <sup>④</sup> **Theme:**        <sup>⑥</sup>

or [Cancel](#)

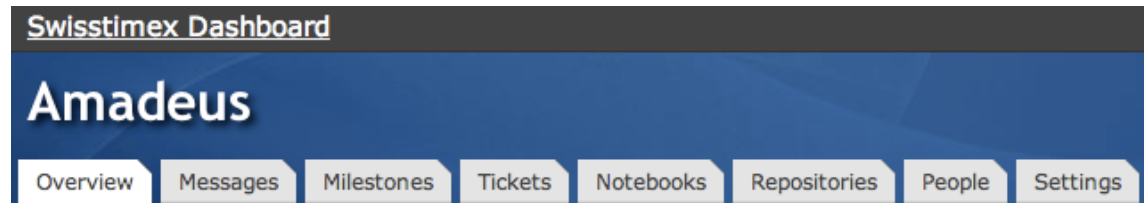
### Active Projects

# Project Tabs 1/2

Swisstimex



Project



## **Overview**

Here you and your team can easily see any recent changes to the source, messages, tickets and any upcoming or late milestones.

## **Message**

This is the project blog. Messages allow you and your team to post project updates, ask questions, get feedback, and more.

## **Milestones**

Milestones help you to assign different tasks to different people or teams of people.

## **Tickets**

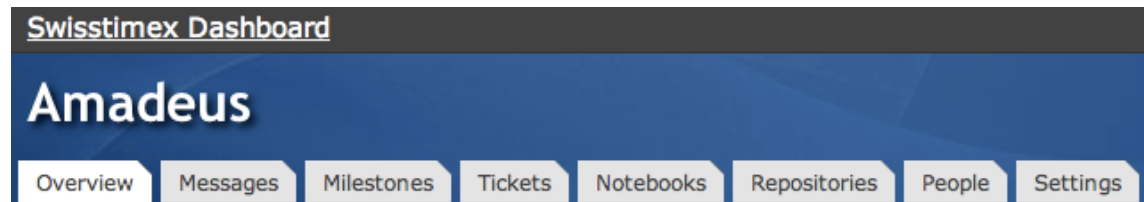
With the tickets report you can select the tickets by project, create a new standard report or export the tickets as cvs file.

## Project Tabs 2/2

Swisstimex



Project



### **Notebooks**

Notebooks are a collection of related pages, often comprising documents such as specifications or reference documents.

### **Repositories**

Each project can have any number of subversion repositories associated with it.

### **People**

The collection represents all people within the project. Here you can assign people to a project

### **Settings**

In this place you can change the project settings, the tickets field and the message category

# Project Settings



A screenshot of the Amadeus web application's Project Settings page. The page has a dark blue header with the 'Amadeus' logo and navigation links like 'Help', 'Personal Settings', and 'Sign Out'. Below the header is a navigation bar with tabs for 'Overview', 'Messages', 'Milestones', 'Tickets', 'Notebooks', 'Repositories', 'People', and 'Settings'. The 'Settings' tab is selected and circled with a red '1'. The main content area is titled 'Project Settings' and has a 'General' sub-section. It contains a 'Project Title' field with the value 'Amadeus', a 'Theme' selection with several color swatches, a 'Description' text area circled with a red '2', and 'Ticket Options' including a dropdown menu set to 'automatically assign to the Reporter' (circled with a red '3') and a checkbox for 'Resolving a ticket will also simultaneously close the ticket.' At the bottom right, there are 'Save Changes' and 'Cancel' buttons, with 'Save Changes' circled with a red '4'. A red arrow points from the 'Save Changes' button back to the 'Description' field. On the right side of the page, there are links for 'Delete this project' and 'Send Feedback'.

- 1) Select "Settings" tab
- 2) Edit project "Description"
- 3) Select Ticket Option
- 4) Click "Save Change" button

# Project Version



Overview Messages Milestones Tickets Notebooks Repositories People Settings

**Ticket Fields**

**Project Versions**

[New version...](#)

**Project Components**

[New component...](#)

**Ticket Severities**

[New severity...](#)

**Message Categories**

[New Category...](#)

**Disk Usage**

Used: 0B 0% Available: 200.00MB

**Backup Settings**

Select how often you would like this project to be backed up and whether or not you would like the backup to be copied to your Amazon S3 account.

**Project Version**

Format: "Major.Minor.Patch.Build"

Example: 1.0.1.256

Secret Access Key:

Bucket: swisscode-amadeus-unfuddle-backups

Update Backup Settings

- 1) Select "Settings" tab
- 2) Click "New version..." link
- 3) Edit version as "Major.Minor.Patch.Build"
- 4) Click "Save" button

**Project Versions**

Major.Minor.Patch.Build Save or Cancel

[New version...](#)

# Project Components

Overview Messages Milestones Tickets Notebooks Repositories People Settings

**Ticket Fields**

**Project Versions**

[New version...](#)

**Project Components**

[New component...](#) (2)

**Ticket Severities**

[New severity...](#)

**Message Categories**

[New Category...](#)

**Disk Usage** (1)

**Component List**

- User Story
- Documentation
- Test Case
- Project Management
- Environment
- GUI
- Database
- Functionality
- Performance
- Middleware
- Look & Feel

Bucket: swisscode-amadeus-unfuddle-backups

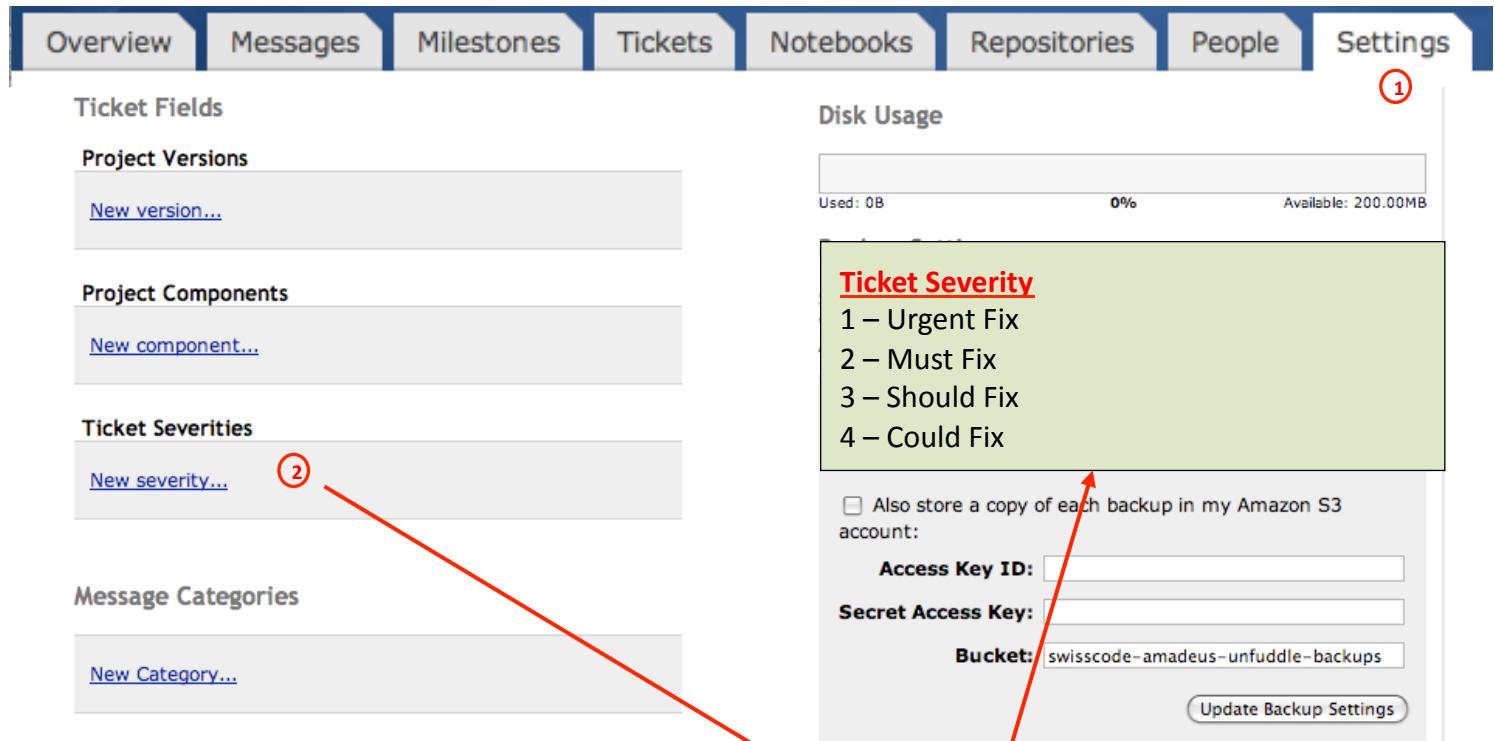
Update Backup Settings

**Project Components**

Documentation (3) Add (4) or [Cancel](#)

- 1) Select "Settings" tab
- 2) Click "New component..." link
- 3) Edit component field
- 4) Click "Add" button

# Ticket Severities



The screenshot shows the 'Settings' tab selected in the top navigation bar. On the left, there are sections for 'Ticket Fields', 'Project Versions', 'Project Components', 'Ticket Severities', and 'Message Categories'. The 'Ticket Severities' section has a link 'New severity...' circled with a red '2'. On the right, there is a 'Disk Usage' section with a progress bar and a 'Ticket Severity' dropdown menu circled with a red '1'. The dropdown menu lists: 1 – Urgent Fix, 2 – Must Fix, 3 – Should Fix, 4 – Could Fix. Below this are fields for 'Access Key ID', 'Secret Access Key', and 'Bucket'.

- 1) Select "Settings" tab
- 2) Click "New severity.." link
- 3) Edit severity field
- 4) Click "Add" button



This close-up shows the 'Ticket Severities' form. It features a text input field containing '1 – Urgent Fix', which is circled with a red '3'. To the right of the input field is an 'Add' button circled with a red '4', followed by the text 'or [Cancel](#)'.

# Message Categories



Overview Messages Milestones Tickets Notebooks Repositories People Settings

**Ticket Fields**

**Project Versions**  
[New version...](#)

**Project Components**  
[New component...](#)

**Ticket Severities**  
[New severity...](#)

**Message Categories**  
[New Category...](#)

**Disk Usage**

**Message Category**

- General
- News
- Project
- Team
- Blog

Also store a copy of each backup in my Amazon S3 account:

**Access Key ID:**

**Secret Access Key:**

**Bucket:** swisscode-amadeus-unfuddle-backups

- 1) Select "Settings" tab
- 2) Click "New Category.." link
- 3) Edit Message Categories field
- 4) Click "Add" button

**Message Categories**

General   or [Cancel](#)

# Create Milestone



## Milestones

[New Milestone](#)

**New Milestone**

Date: 2009 Dec 31

Title: **Backlog**

Person Responsible: <unassigned>

**Milestones**

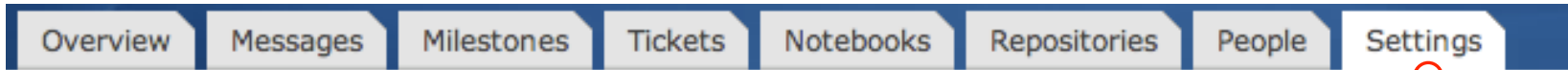
- Backlog
- Sprint 1
- Sprint 2
- Sprint 3
- Sprint N

Create Milestone or [Cancel](#)

- 1) Select "Milestone" tab
- 2) Click "New Milestone" link
- 3) Edit Date
- 4) Edit Title
- 5) Assign Person Responsible
- 6) Click "Create Milestone"

### Upcoming Milestones

<input type="checkbox"/>	<b>Sprint 1</b> Monday, 30 Nov 2009 No Associated Tickets	<a href="#">Edit</a>
<input type="checkbox"/>	<b>Sprint 2</b> Thursday, 31 Dec 2009 No Associated Tickets	<a href="#">Edit</a>
<input type="checkbox"/>	<b>Sprint 3</b> Sunday, 31 Jan 2010 No Associated Tickets	<a href="#">Edit</a>
<input type="checkbox"/>	<b>Backlog</b> Sunday, 28 Feb 2010 No Associated Tickets	<a href="#">Edit</a>



## Project Settings

- 1) Select "Setting" tab
- 2) Click "Request a backup... now" link
- 3) Click "Ok" button
- 4) Select backup schedule
- 5) Click "Update Backup Settings" button

### Backup Settings

Select how often you would like this project to be backed up and whether or not you would like the backup to be copied to your Amazon S3 account.

[Request a backup of this project now](#) (6)

This project should be backed up  (4)

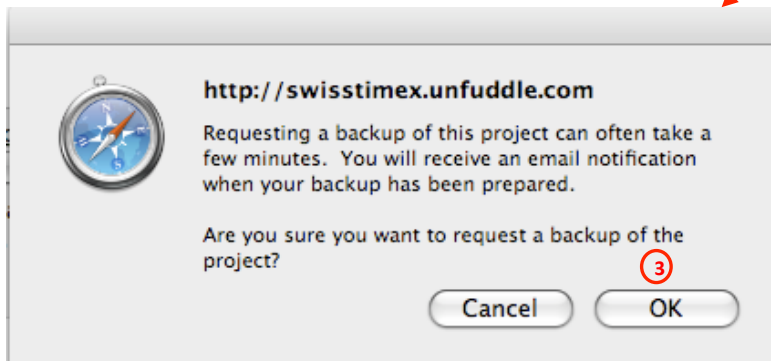
Also store a copy of each backup in my Amazon S3 account:

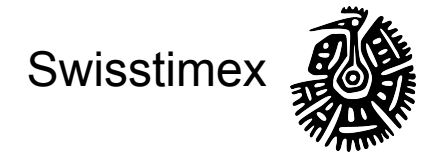
**Access Key ID:**

**Secret Access Key:**

**Bucket:**

(5)





## **Ticket Management**

# Create Ticket



- Overview
- Messages
- Milestones
- Tickets
- Notebooks
- Repositories
- People
- Settings

[New Ticket](#) [New Report](#)

## New Ticket

### Short Summary:

**Ticket Prefix**  
- REQ -  
- BUG -  
- TASK -

- 1) Select "Tickets" tab
- 2) Click "New Ticket" link
- 3) Edit Short Summary field
- 4) Edit Full Description text box
- 5) Select Priority
- 6) Select Severity (only BUG)
- 7) Select Version
- 8) Attach a file
- 9) Assign to Person
- 10) Select Milestone
- 11) Define Due Date
- 12) Click "Create Ticket" button

### Full Description:

H1 H2 H3 | B I | [Icons]

Priority:

Severity:

Component:

Version:

Assign To:

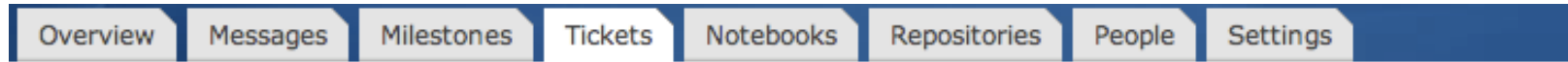
Milestone:

Due On: [No Due Date](#)

[Edit Severities, Components and Versions](#)

[Attach a file...](#)

or [Cancel](#)



## Short Summary

REQ – Story title (example: Account holder withdraw cash)

## Full Description

*Structure:*

As a **<type of user>**, I want **<some goal>** so that **<some reason>**

Example: As an Account Holder I want to withdraw cash from an ATM so that I can get money when the bank is closed

## *Scenarios[1 – n]*

Title

Given **<context>** And **<some more context>**...

When **<event>**

Then **<outcome>** And **<another outcome>**...

## Priority

Highest, High, Normal, Low, Lowest.

## Component

User Story

## Milestone

Backlog or Sprint

## Attach a file

User Story document

# Defect Management

Swisstimex



Overview

Messages

Milestones

Tickets

Notebooks

Repositories

People

Settings

## **Short Summary**

**BUG** – Defect title

## **Full Description**

Defect description; Expected result; Procedure to reproduce; Environment

## **Severity**

1 – Urgent Fix; 2 – Must Fix; 3 – Should Fix; 4 – Could Fix

## **Priority**

Priority to fix it. Highest, High, Normal, Low, Lowest.

## **Version**

Major.Minor.Patch.Build

## **Component**

GUI; Database; Functionality, Performance; Middleware, Look&Feel

## **Milestone**

Backlog or Sprint

## **Assigned to:**

Assign defect to development team

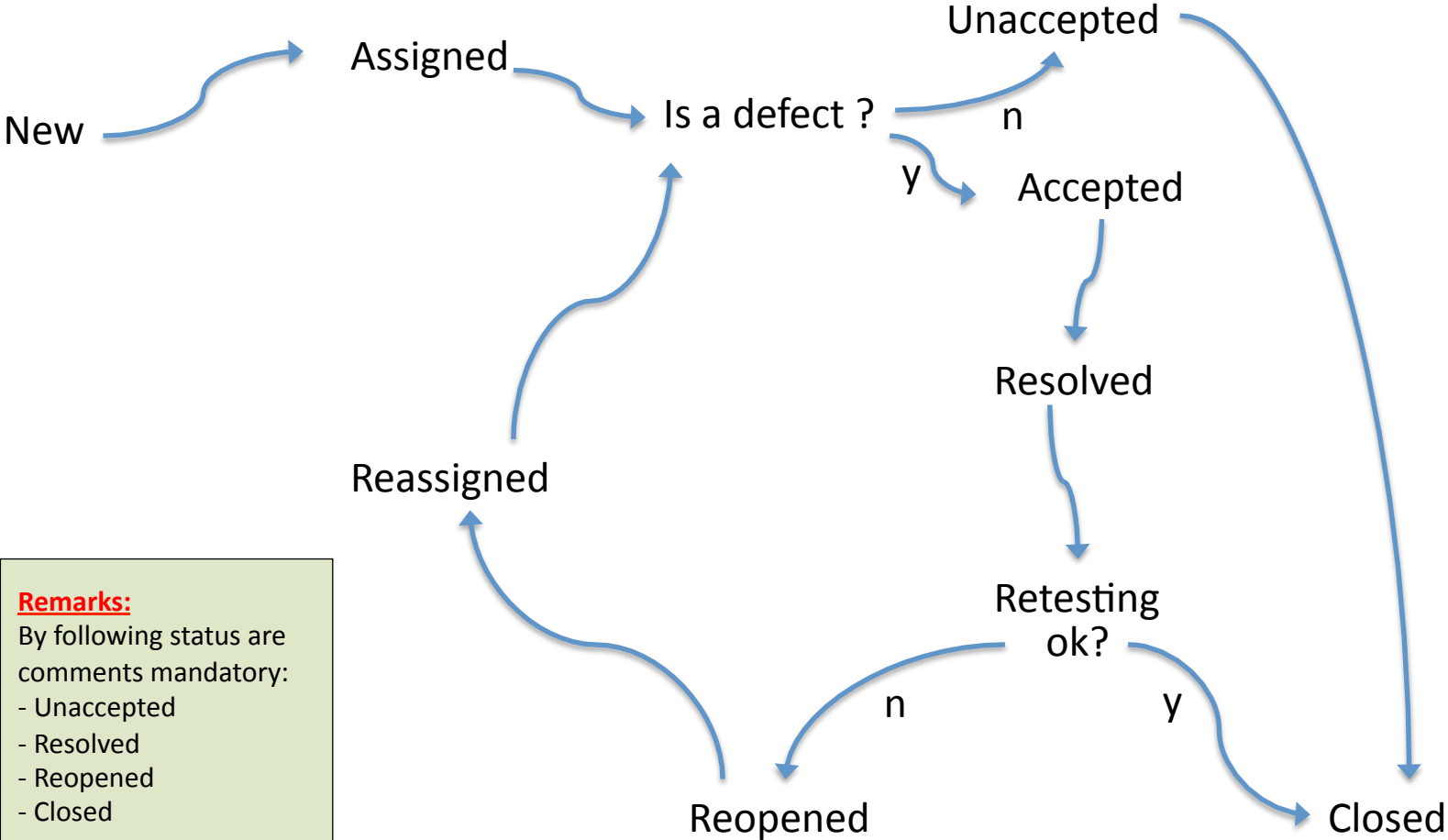
## **Attach a file**

Screenshot

# Defect Management - Workflow



- Overview
- Messages
- Milestones
- Tickets
- Notebooks
- Repositories
- People
- Settings



**Remarks:**  
By following status are comments mandatory:  
- Unaccepted  
- Resolved  
- Reopened  
- Closed

# Task Management

Swisstimex



Overview

Messages

Milestones

Tickets

Notebooks

Repositories

People

Settings

## **Short Summary**

TASK – Activity title

## **Full Description**

Activity description

## **Priority**

Highest, High, Normal, Low, Lowest.

## **Component**

Documentation; Test Case; Project Management; Environment

## **Version**

Major.Minor.Patch.Build

## **Milestone**

Backlog or Sprint

## **Assigned to**

Task responsible

## **Due Date**

Completion date

## **Attach a file**

Attach document

### **Remarks:**

Following status are available:

- New
- Assigned
- Closed

## Message Management

# Create Message



Overview Messages Milestones Tickets Notebooks Repositories People Settings

## Messages

[New Message](#)

### New Message

**Title:**

**Body:**

H1 H2 H3 | B I | [List Icons] | [Link Icon] [Image Icon] [Video Icon] [Audio Icon] [Code Icon] [Markdown] [Search Icon] [Share Icon]

[Attach a file...](#)

**Categories:**

Blog

General

News

Project

Team

or [Cancel](#)

- 1) Select "Message" tab
- 2) Click "New Message" link
- 3) Edit Title field
- 4) Edit body a text box
- 5) Select Categorie(Blog, General, News, Project, Team
- 6) Attach a file.
- 6) Click "Post Message" button

## Wiki Management

# Create Notebook



Overview Messages Milestones Tickets **Notebooks** Repositories People Settings Search:

**Notebooks**

[New Notebook](#)

**New Notebook**

**Title:**

Create Notebook or [Cancel](#)

- 1) Select "Notebooks" tab
- 2) Click "New Notebook" link
- 3) Edit Title field
- 4) Click "Create Notebook" button


# Create Notebook Page



Overview Messages Milestones Tickets **Notebooks** Repositories People Settings

## Notebooks

[New Notebook](#)

 **demo** (2 pages)  
Updated by Gianni M. on 01 Nov 2009 01:56

- 1) Select "Notebooks" tab
- 2) Click an notebook link
- 3) Click "New Page"
- 4) Edit page "Title"
- 5) Select format as Markdown, Textile, Plain Text
- 6) Edit page "Body"
- 7) Optional: Attach a file
- 8) Click "Create Page" button

### demo: Page Index

[Home](#) [New Page](#)

2 Pages

[Recent Activity](#) [Attachments](#) [Page Index](#)

#### New Page

Title:

Attachments: ?

[Attach a file...](#)

Body:

H1 H2 H3 B I       

Markdown

or [Cancel](#)

## Repository Management

# Create Repository



## Repositories

[New Repository](#)

### New Repository

Title:

Abbreviation: (This will be used in the URL for the repository)

Type:

Subversion [What is the difference?](#)

Description (Optional):

#### Project Associations

Check the boxes below to associate this repository with projects associated with at least one project in order to be accessible.

**NOTE:** It may take up to two minutes for the repository to be visible.

Amadeus

permissions of a project. As such, a repository **MUST** be associated with at least one project.

or [Cancel](#)

- 1) Select "Repositories" tab
- 2) Click "New Repository" link
- 3) Edit Title field
- 4) Edit Abbreviation field
- 5) Select repository type: Subversion or Git
- 6) Edit Description field
- 7) Click "Create Repository" button

# Access Repository



## How to access to your Subversion repository over https?

Once you have the Subversion client (Tortoise or other) installed on your development machine, accessing your project repository is simple:

Select following URL:

`https://domain.unfuddle.com/svn/<Short Project Name>/`

Example:

`https://domain.unfuddle.com/svn/amadeus/`

Please also note that you will have to enter your username and password for authentication.



## **People Management**

# Invite a Person



## People

[Invite a Person](#)

### Invite a Person

**Email Address:**

**First Name:**

**Username:**

**Last Name:**

**Personal Message** (optional, included in welcome message):

### Permissions

**Messages:** None

**Tickets:** None

**People:** None

Project Administrator

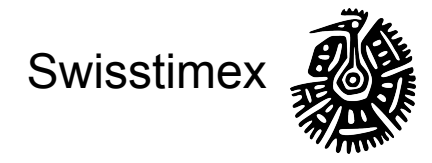
**Milestones:** None

**Notebooks:** None

**Source:** None

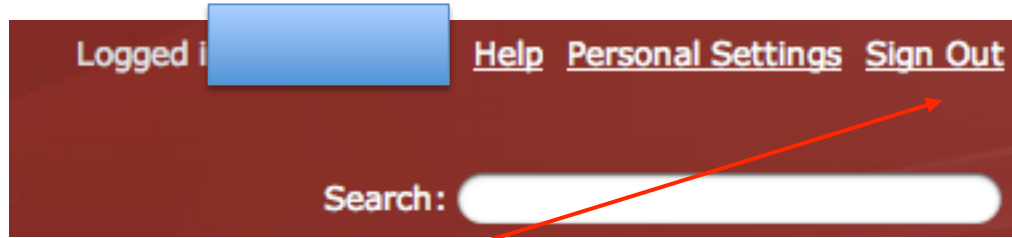
or [Cancel](#)

- 1) Select "People" tab
- 2) Click "Invite a Person" link
- 3) Edit Email Address field
- 4) Edit First Name field
- 5) Edit Last Name field
- 6) Edit Username field: Initial Last Name + FirstName
- 7) Edit Personal Message text box
- 8) Set Permission
- 9) Click "Invite Person" button



**Logout**

# Sign Out



- 1) Click "Sign Out" link
- 2) Sign In screen appears

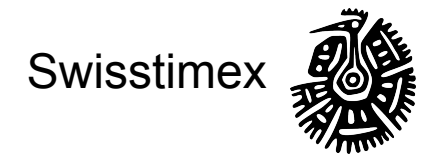
## Swisstimex Sign In

[Use OpenID](#)

**Username:**

**Password:**

[Password Reminder](#)  Remember Me



**Support**

# Support



If you have any questions about the Unfuddle tool, following documents will help you to answer your questions:

- Swisstimex – Unfuddle Manuale (this guide)
- Unfuddle Help: <http://unfuddle.com/support>

Enjoy working with Unfuddle!

Regards

<http://Swisstimex.ch>

*Better software quality, lower cost and faster delivery*