

UX Planning Process & Guidelines

DRAFT -- Below is an email sent to the team. Next iteration I'll clean this up. format it for the wiki and add other relevant information

Hi all,

Shaw-Han and I met to talk about some logistics around planning -- particularly how jira, confluence & card meeting can support our activities. Shaw-Han has been spending time to figure out the best way to use jira and alleviate multiple task management locations.

Confluence for current iteration tasks: <http://wiki.fluidproject.org/x/chca>

Confluence for next iteration tasks: <http://wiki.fluidproject.org/x/WRka>

Jira: <http://issues.fluidproject.org/secure/IssueNavigator.jspa?mode=hide&requestId=10020>; - This link will show you all the tasks from the first iteration.

Here's an update on what we discussed/decided:

-Shaw-Han entered all current iteration task into jira. They are categorized under the project (component field in jira) they're related to (i.e. user testing, walkthroughs, CIs, component design, uCamp). Everyone please take some time to assign any tasks you've worked on. Enter the time you worked on them -- for now as a comment and soon we'll have a specific field for it. It's easier (on the memory) to enter the time you spent on tasks at the end of each day but for sure we'll need this done by our planning meeting on Tuesday.

-Once a task is complete, please mark it as resolved. At the end of the iteration that's how we'll track what we got done.

-There are some cases where activities took significant time and we hadn't accounted for them in the iteration (Allison & Eli's time spent on interviewing for the Quali UX lead position for instance). Please add tasks for those and include the time you spent on them so we can get a more realistic velocity measurement.

Below is targeted at project leads but probably good information for everyone -- only leads have action items from it:

-In other cases, we've found tasks should have been broken down differently to allow for it (or part of it) to get done in an iteration. An example of this is the Contextual Inquiry (CI) tasks. I created tasks for each CI that were meant to be inclusive of recruiting, travel time, the CI & note processing and management. As it turns out much time has been spent on recruiting for many of the CIs and the rest of the task hasn't always been completed (or will not be completed by end of iteration). In that case, I'm going to separate out recruiting from the rest of the card since it's not necessarily done in the same time period as the rest of the task. If there are other similar cases like this, project leads please feel free to make adjustments (we are learning a lot already about our process -- how flexible of us!).

-We'll go ahead and leave higher level release tasks in cardmeeting for now and figure out a way to present them as part of the release plan so the community has a view into our plans. So leads, use card meeting to see what we have planned for this release (Jan - March) and determine what needs to be done in each iteration.

-For iteration tasks, please enter them in the confluence space for this iteration, <http://wiki.fluidproject.org/x/WRka>, like we did last time. There are some additions we are waiting for in jira that will allow us to enter them directly in jira and display in confluence but for now (so we don't cause confusion) just add them to the table in jira. I added a few tasks already including several ongoing tasks that we should be accounting for.

Shaw-Han, have I missed anything?

Thanks -- and let myself or Shaw-Han know if you have any questions about any of this!

Daphne Ogle