Project Startup Checklist

## Document Status

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## Change Record

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## Reviewers

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| Name | Version reviewed | Position | Date |
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# Purpose of This Document

Project Startup Checklist is a recommended list of steps you should go through when you start a team project. Some steps may not be required and some more steps might need to be added depending on your project requirements.

# Set Up a Team Project

## Create a Team Project

Create a team project using the VSTS Process for Agile Software Development Process Template.

## Set Permissions

Set permissions for team members for the following:

### Team Project

In Team Explorer, right-click the team project, point to **Team Project Settings**, and then click **Group Membership**.

### SharePoint Project Portal

Access the portal with an account that is a member of the SharePoint Administrator group. Click **Site Settings**, and then click **Manage Users** under **Administration**.

### SQL Reporting Services

Log on with an administrator’s account to the SQL Reporting Services administration site. The site is located at http://TFS Name/reports. Click your team project name, click the **Properties** tab, click the **Securities** tab, and then click **New Role Assignment**.

## Set Up Source Control

### Structure Projects and Solutions in Source Control

Create a structure for Visual Studio solution and project files and other project artifacts based on your team’s requirement.

### Set Up Check-in Policies

Setup the business rules or policies that surround source code check-ins. For more information, see "Check-in Policies and Notes" in the Visual Studio Help.

## Customize Team Project Portal

Customize the team project portal based on your team’s needs. You can customize project description to better describe the new team project, such as describing project purpose, goals, or vision. You can also change the site theme. To see these and many more options to customize the portal, click **Site Actions**, click **Site Settings**, and then go to **Look and Feel** section.

## Configure Build

Create an initial source tree and set up the build to run on a periodic, usually daily, basis. For more information, see "Administering Team Foundation Build" in the Visual Studio Help.

## Migrate to TFS (if required)

### Migrate Source Code from Visual Source Safe

If you are bringing an existing project into Visual Studio, you can migrate the source code from Visual SourceSafe. For more information, see "Migrating from Visual SourceSafe" in Visual Studio Help. You should complete migration of source code before team members are granted access to the team project.

### Migrate work items from ClearQuest or a CSV file

If you are bringing an existing project into Visual Studio, you can migrate work items such as bugs and tasks from ClearQuest or a CSV file. For more information, see "Migrating from ClearQuest" in Visual Studio Help. You should complete migration of work items before team members are granted access to the team project.

## Define Areas to Structure Your Project

Use the Area path in the Areas and Iterations section to create a structure for your project. An area is a logical grouping or category. For example, you may want to use different areas to represent different customers, certain features, or different groups that are working on the project. The following are two examples of using Area path:

* + Area
    - Project A
      * Module 1
      * Module 2
      * …
  + Area
    - Release A
      * Team 1
      * Team 2
      * …

## Define Iterations

Define iterations for your project in the Areas and Iterations section. Each iteration should result in an internal or external release with the additional functionality of the user stories or bug fixes scheduled for the iteration. The following is an example of using an iteration path:

* + Iteration
    - Iteration 0
    - Iteration 1
    - Iteration 2
    - …

## Send E-Mail to Users for Installation and Getting Started

Send an e-mail message to team members with information about which Team Foundation Server they should connect to and which team project they should use so they can get started working on the team project.

# Scope the Project

## Create a Vision Document

Create a Vision document for the project. A sample document and a template are available in the folder ../Documents/Samples and Templates/Vision and Planning.

## Create Personas

Create Personas for the project. A sample document and a template are available in the folder ../Documents/Samples and Templates/Personas and Design.

## Create an Initial Stakeholder Matrix

Create an initial stakeholder matrix for the project to capture important stakeholders for this project. This document should be reviewed and updated periodically. A sample document and a template are available in the folder ../Documents/Samples and Templates/Vision and Planning.

# Plan the Release

## Create User Stories (Product Backlog)

Brainstorm the project requirements with the team and document them as user stories. Assign rough estimates and priority to the user stories. The user stories should be captured as User Story work items in TFS. A sample document is available in the folder ../Documents/Samples and Templates/Personas and Design.

## Create a Test Approach Document

Create a Test Approach for the project. A sample document and a template are available in the folder ../Documents/Samples and Templates/Test.

## Define the Bug Triage Process

Define the process for managing bugs in your team. Define a definition for Severity and Priority of bugs; decide on the frequency of triage meetings. Capture this in a Test Approach document for the project. A sample document and a template are available in the folder ../Documents/Samples and Templates/Test.

## Place User Stories into Different Iterations

Based on the capacity available for each iteration, assign user stories to different iterations based on their stack rank. To complete this step, use the Product Backlog workbook in the folder ../Documents/Shared Documents/Project Management.

# Plan and Track the Iteration

## Plan the Iteration

Break user stories into tasks. Stack rank the user stories and bugs. Based on the iteration capacity, move the user stories that cannot be completed in this iteration to the future iterations. To complete this step, use the Iteration Backlog workbook in the folder ../Documents/Shared Documents/Project Management.

## Track the Iteration

Track the progress of the iteration using the Iteration Tracking workbook in the folder ../Documents/Shared Documents/Project Management.