

Developing, implementing, and disseminating an adaptive clinical reasoning curriculum for healthcare students and educators

612454-EPP-1-2019-1-DE-EPPKA2-KA



D6.1 Planning and introduction into the agile project management

Deliverable number	D6.1
Delivery date	Feb 2020
Status	v1.0 final
License	BY-NC-ND
Authors	Martin Adler - Instruct
Reviewed by	All partners



Co-funded by the
Erasmus+ Programme
of the European Union

The European Commission's support for the production of this publication does not constitute an endorsement of the contents, which reflect the views only of the authors, and the Commission cannot be held responsible for any use which may be made of the information contained therein.

Feature Overview	2
1.1. Limitations	2
1.2. Cards	2
1.3. Granularity of cards	3
1.4. Granularity of comment is the activity section	3
1.5. Reflection	3
Use of Trello	4
2.1. Users / Team	4
2.2. Boards	4
2.3. Creating, editing and moving cards	5
2.4. Miscellaneous	7
2.4.1 Label display	7
Support	8

An agile project management approach provides an ideal environment to implement quality assurance from the beginning and throughout a project, since the agile approach focuses on customer satisfaction and the value of a product. During the kick-off meeting all partners were introduced into the concept of agile project management. After an assessment of the groups needs, it was agreed on using Trello (<https://trello.com>) as a communicative platform for the project management. In this document we will briefly describe how we intend to use Trello in the project and provide some guidelines.

This document is mainly a tutorial and how-to for project members but is also a deliverable report, promised in the project proposal and potentially also visible for European Commission.

1. Feature Overview

Main elements of Trello

1. **Boards** are a screen / workspace, we will have one board per work package
2. **Lists** are the columns, usually in DID-ACT we will have “ToDo” (or “Backlog”), “In progress”, “In Review”, “Done” -> more lists can be added if needed.
3. **Cards** in DID-ACT cards are the specific tasks within a work package but also the deliverables. We can define as many cards as needed.
 - a. Cards offer a range of features described in detail below.

1.1. Limitations

The Trello business model has main limitations concerning the number of “boards” per team, which is at this point 10, which is fine unless we need way more than our work packages. Until 10 boards we can use Trello for free, above we would have to pay around \$10 per user AND month, which would get very soon to \$1200 for the entire project.

1.2. Cards

In DID-ACT we will use cards for defining tasks.

This means that each card should have at least

- **Title:** The title is displayed in the board overview and should be short enough to keep a good overview, but specific enough to explain the main purpose. Cards representing a deliverable have to contain the deliverable identifier as the prefix, e.g. “D1.1”. It may make sense to give card names that contain a hint to which deliverable they belong (if they do) when you create a bunch of cards related to a deliverable.
- **Description:** Amore in detail comment about a card, should contain the objective, potentially a plan how to do it.
- **Member(s):** All project members (persons) working on this card should be added.
- **Labels:** To be defined 100%. At this moment labels are defined as project partners, so they could be used to either represent which partner(s) is/are working on a particular card, or which partner(s) is/are the lead for a task. IMPORTANT: Labels are unfortunately board and not team specific, so changes would NOT automatically be pushed to all other DID-ACT boards. So please: if you have any suggestions for changes on the labels level, do not just change it, but let us know.
- **Checklists:** Cards representing a DID-ACT project deliverable from the grant should at least have a checklist for the quality criteria. More can be added when needed. Non-deliverable cards can but do not have to contain a checklist for quality criteria. You can use checklists here as well for describing subtasks. It’s possible to have more than just one checklist per card.
- **Due Date:** Every card should have a due date, as this is one of the most important instruments for working on tasks.
- **Attachments:** Should not be used heavily, as we use Google Drive as our document pool. Please consider using links to Google Drive instead.
- **Cover:** At this point not used
- **Activity:** Please, use the commenting section to document progress in a card, especially when several members are working on one card/task, this can help to let other members know what happened and which sub tasks were already addressed.

1.3. Granularity of cards

As discussed during the kick off meeting, there is no 100% solution for the different levels of granularity for cards/tasks. Please think carefully about splitting longer tasks into several cards. A rough guideline would be that one card (except for the deliverables) should not run over more than 2-3 months.

We will review the granularity after the first months of DID-ACT and discuss whether we have to specify the creation of cards in more detail.

1.4. Granularity of comment is the activity section

Also, for this there is no 100% solution and naturally people think of this in very different ways. Thus, it is a quite common documentation issue in all domains, e.g. patient documentation where teams collaborate.

Please, try to think "what would help me to understand what was done?", so "major" steps should be briefly described here. On the other hand it should be short enough to not overwhelm others. Be precise! So, write as much as needed, but as short as possible. Summary statements from patient care is a perfect example of writing short but comprehensive information.

1.5. Reflection

An important part of the agile approach is self reflection on the work. So, one part of going regularly through the boards is to talk about what went well and what could be improved for future cards/tasks. In addition to these regular reviews and discussions, we will do a major review six months after the project started and discuss any necessary adaptations to the current workflow.

2. Use of Trello

2.1. Users/Team

Instruct is the administrator of the "team" DID-ACT within Trello, so when new members need access to DID-ACT Trello boards, please let them create their account on Trello (it's free) and then let us know and we will invite the new accounts to our project team.

In your profile you can also select the user interface language of Trello. Please make sure that all information within cards is in our project language English.

2.2. Boards

As described above, using Trello for free has the limit that we are only allowed to use ten boards altogether. We already predefined the eight work package boards plus one board for project meetings and another one for an overview of ongoing research projects and studies. If you see any reason to create an additional board, please let us discuss this first in our regular online project meetings. You can use Trello of course for yourself and create non DID-ACT team boards as many as you want, they are just not usable for the team and this project. We will also use the boards as the basis and status of DID-ACT within online and face-to-face project meetings.

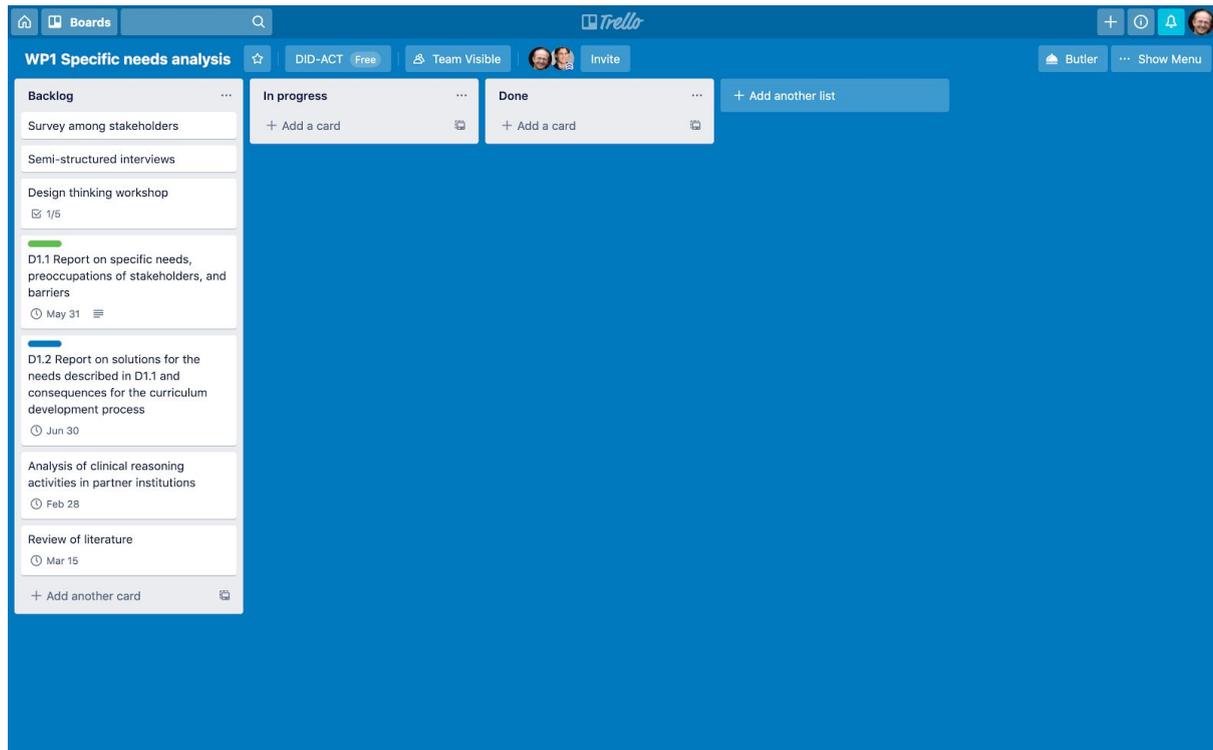


Image: Trello board - example for DID-ACT WP1

The project meeting board will be used for our bi-weekly online meetings. It has two lists for the upcoming and the archived meetings. Please use this board also for smaller or internal project meetings. For a new meeting, please name it with a title, the related work package, date, and time and add the participants as members.

For all meetings please create a checklist for the agenda items and use the Activity blog for brief meeting minutes or link to meeting-related documentation.

2.3. Creating, editing and moving cards

At the bottom of each “list” you see a “+ add another card” button/link, so this is really very easy! Moving a card from one “list” to another or changing the order within a list can be performed by drag and drop or right mouse click and “move”.

For editing the more detailed components of a card please click on the cards name and a dialog with all possible components described above will come up.

When a task has been completed, please move it into the "Done" list and make sure that you tick the due date when it is completed.

To keep the boards clean we can also “archive” cards which are completed. This can be done by either a right mouse click on the cards name in the board overview, or from the card details dialog within “ACTIONS”. However, please NEVER delete cards from the archive, as we will use the cards also for official documentation purposes, and when you delete cards

from the archive they will be deleted for good. ! So, this is one of the most important guidelines:

- ARCHIVE -> Sure, you can do that.
- DELETE -> Never do this!

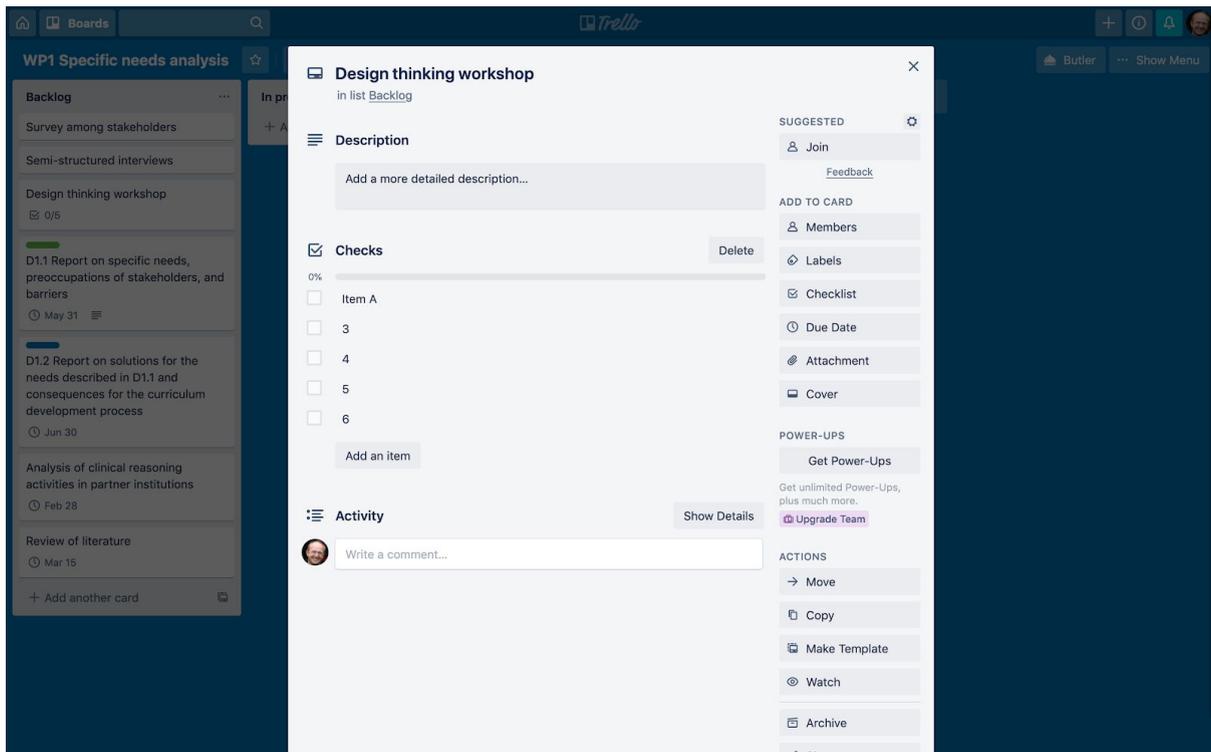


Image: card details

The components described above can be added with the right navigation toolbox "ADD TO CARD", the Activity blog is just at the bottom of the card content area

The screenshot shows a Trello card interface. At the top, the card title is "HowTo for DID-ACT Trello use" with a close button (X) in the top right. Below the title, it says "in list In Progress" with a public icon. A "DUE DATE" section shows a checkbox and the date "Feb 29 at 12:00 PM" with a dropdown arrow. The "Description" section has a menu icon, the word "Description", and an "Edit" button. The description text reads: "Create a Document of how to use Trello within DID-ACT project, especially wording, use of labels, due date,".

The "Structure" section features a checklist with a 67% progress bar. The items are:

- Overview of Trello / Terminology
- Quick documentation of Trello UX
- Support

There is an "Add an item" button below the checklist. To the right of the checklist are buttons for "Hide completed items" and "Delete".

The "Activity" section has a "Show Details" button and a comment input field with a placeholder "Write a comment...". Below is a comment from "Martin Adler" 5 hours ago: "Started GoogleDOc 1st draft https://docs.google.com/document/d/1wBjov_-i1pGbp0PU8jYtUsCm5Nn0wVf1RCQWKspbWB0/edit#heading=h.fbcb2dg6ad1i". Below the comment are icons for "Edit", "Add Link as Attachment", and "Delete".

On the right side, there are several sections of options:

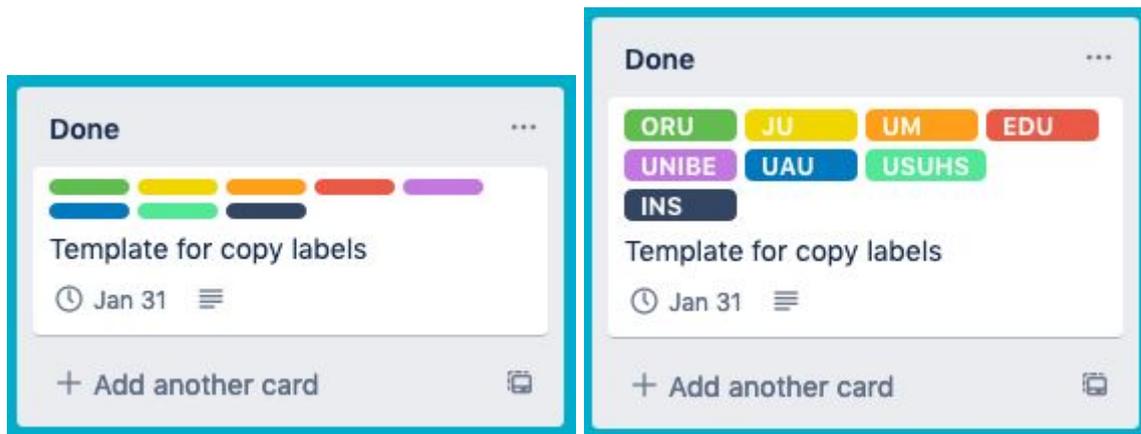
- SUGGESTED**: "Join" button with a "Feedback" link below it.
- ADD TO CARD**: Buttons for "Members", "Labels", "Checklist", "Due Date", "Attachment", and "Cover".
- POWER-UPS**: "Get Power-Ups" button, followed by text "Get unlimited Power-Ups, plus much more." and an "Upgrade Team" button.
- ACTIONS**: Buttons for "Move", "Copy", "Make Template", "Watch" (with a green checkmark), "Archive", and "Share".

Image: Card details with a example checklist and a comments in the activity blog.

2.4. Miscellaneous

2.4.1 Label display

Labels per default are displayed only as thin bars, with a click on the bars the descriptions can be displayed as well.



Images: Different modes of label display with and without label names.

3. Support

If you have any issues with DID-ACT Trello boards, please let us know. For technical issues you can also consider reaching out to the Trello help pages. Content-related questions can be discussed in the team but also directly with Instruct and/ or the project coordination.

If you have questions and/ or comments concerning this document, please contact Instruct: support@instruct.eu or Martin: martin.adler@instruct.eu