CA Agile Vision™

Getting Started Guide

Winter 2011

ca technologies

Support for Agile Vision

The following types of support are available for CA Agile Vision customers:

CA Agile Vision Team Edition Support

For your convenience, CA Technologies provides a self-supported CA User Community Online Forum where you can access information about CA Agile Vision, ask questions, and share experiences with other users.

Email or phone support is unavailable. There is no guarantee that issues reported through the community forum will be monitored by CA Support.

If you have comments or questions about documentation, you can submit questions or feedback on the CA User Community Online Forum.

CA Agile Vision Enterprise Edition Support

For your convenience, CA Technologies provides one site where you can access the information you need for your Home Office, Small Business, and Enterprise products. At http://ca.com/support, you can access the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

Provide Feedback

If you have comments or questions about documentation, you can send a message to techpubs@ca.com.

If you would like to provide feedback about documentation, complete our short customer survey, which is also available on the CA Support website, found at http://ca.com/docs. Full technical assistance is available for CA Agile Vision Enterprise Edition customers. For more information, contact CA Customer Support.

Contents

Appendix A: Third-Party Acknowledgements   37

Chapter 1: Overview

This section contains the following topics:

About CA Agile Vision

CA Agile Vision (Agile Vision) enables customers to manage products that follow the scrum methodology in an intuitive and simple manner. Agile teams can plan product releases based on date, demand, and capacity. Agile Vision is web-based and available on the internet, so team members can participate in sprint planning, view, and update status from wherever they are located.

For more information about Agile Vision, see the online help.

Agile Vision Login

All new Agile Vision users are given a user name and a temporary login password. As a convenience, you can set the check box to have Agile Vision automatically populate the User Name field with your login user name.

When you first log in to Agile Vision, you are instructed to change your password immediately.

To change your password

1. Enter a new password and confirm it.

   Your new password must contain the following:

   ■   At least 8 characters

   ■   Upper- and lower-case alphanumeric characters

2. Select a security question from the drop-down.

3. Enter your answer.

4. Click Save.

Get Started

All users logging in to Agile Vision are directed to their Home page, where they can view the following items:

- A list of open tasks assigned to them.

- Links to the following:

    - *CA Agile Vision Getting Started Guide*

    - User story create page

    - Virtual Wall (for managing tasks)

Each task in the task list displays the product, release, sprint, user story, and team it is a part of, and a breakdown of hours. The tasks are sorted alphabetically by sprint end date. If no tasks are created or assigned, the list is empty. If you are logging in to Agile Vision for the first time, or you are not yet a member of a team assigned to a product, you will not see any assigned tasks.

Important! Only users who are members of a team assigned to a product can create or modify the product user stories, tasks, or scrum teams. Users who are not assigned to the product can only view product details. For more information on permissions, see Access Rights.

Users can click a task, user story, or sprint title to view its respective details, or click Edit to edit the task.

The following graphic illustrates how to build and manage a product in Agile Vision:
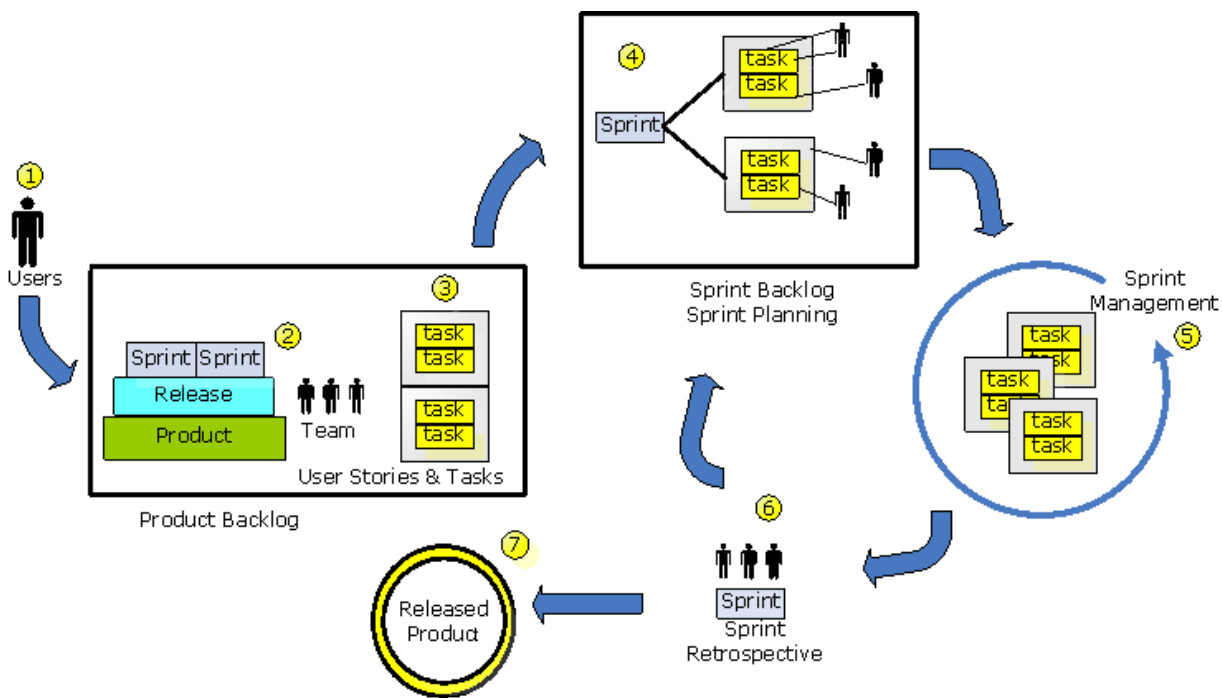
Managing products in Agile Vision involves the following tasks

1. The system administrator or super user adds users from the Force.com org to be active Agile Vision users.

2. The system administrator or super user sets up the product for team participation. Setup tasks include the following:

   - Create a product

   - Create releases, and sprints, as sub-items of the product

   - Create a scrum team and assign Agile Vision users to the scrum team as members

     - Define team member allocation

     - Estimate the team's sprint velocity

     - Assign one or more teams to a sprint

3. Team members add user stories, which describe the features and functionality to be delivered, to the product backlog. The team estimates points for each user story, creates dependencies on other user stories, and defines acceptance criteria.

4. During sprint planning, team members do the following:

   - Decide what user stories to deliver for the upcoming sprint

   - Move user stories from the product backlog to the sprint backlog

   - Assign owners for the user stories

   - Create tasks and assign owners

   - Estimate hours needed to complete tasks

   The team commits to the sprint and begins development and testing

5. During the sprint, the team updates task and user story status. Team members can pull additional items from the product backlog or reallocate work by reassigning tasks.

   Team members track daily progress through hours and points burndown charts and user story status on the User Stories & Charts and the Dashboard pages. Team allocation charts enable the team to quickly view individual workloads.

6. At the close of the sprint, team members hold a post-sprint review to do the following:

   - Discuss the sprint's successes and failures

   - Discuss steps to take to improve the process in subsequent sprints

   - Add retrospective notes to the sprint detail so that team members and other users can view them

   - Close the user stories and the sprint

   - Plan the next sprint

7. When all the sprints are completed, the product is released and the product manager closes the release.

This guide describes how to use Agile Vision to quickly set up your agile product, manage user stories and tasks, and track sprint and release progress. For more detailed information about each step in the agile process, see the online help.

Note: This guide assumes that Agile Vision users are already familiar with scrum methodology and agile terminology.

Get Help

To get context-sensitive help in Agile Vision, click the Help link in the header. For example, clicking Help on the Backlog page displays the help topic that explains the tasks that you can do on the page, with links to the appropriate procedures.

Note: If help does not launch in a separate window, check your browser options. Your browser should allow new content to display in a new window rather than a tab.

Page Features

The Agile Vision and Product Vision pages have a number of convenient features to help you set up and manage your products more easily.

View Filters

Some pages have a filter below the header that enables you to control what you view on the page. For example, you can filter the Sprint Detail page to view details by product, sprint, and team. Select a product to constrain the list of sprints to only those sprints associated with the product. Select a sprint to constrain the Team filter choices further to teams assigned to the sprint. The data displayed on the Sprint Detail pages shows only information relating to the chosen team for the chosen sprint.

The filtered view becomes the default view on subsequent visits to the Backlog, Product Dashboard, and Sprint Detail pages until you change the settings.

Tool Tips and Hover Text

Tool tips display for buttons and links on pages throughout Agile Vision and Product Vision. On pages such as the detail pages, where a product or its related components appears as a link (underlined), hover text displays pertinent information about the component. Users can quickly view information without navigating away from their current page. For example, on the User Story Detail page, the hover text for Sprint displays:

- Sprint name

- Sprint start and end dates

- Goals

- Risks

If users need more information than what is displayed in the hover text, or they need to change properties, they can click View or Edit within the hover text to navigate to the respective pages.

Navigation Links

Users can navigate to most pages from almost every Agile Vision or Product Vision page. On list pages, action items such as Edit or View appear in an Action column. Clicking Edit navigates to the edit page for the product or component being viewed. Clicking View navigates to its detail page.

Names of products and their components appear as underlined text. Clicking these links navigates to their respective detail pages. Quick info cards that appear as hover text also contain view and edit buttons.

On pages that are not main menu pages, a Back button on the header navigates to the previous page.

Sort a Table

On pages where data is displayed in table format, users can sort the table on any of the columns.

Note: You cannot sort user stories and tasks on the Backlog page. They are ordered by rank only.
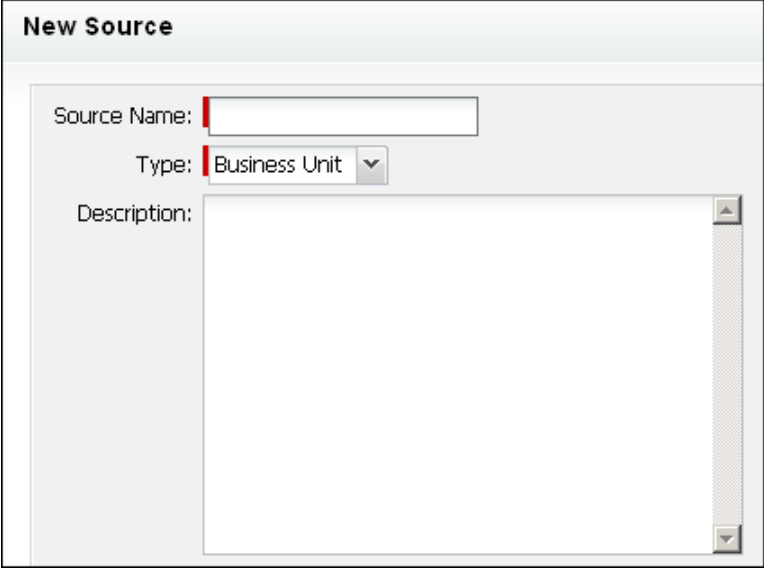
To sort a table

1. Move the cursor over a list heading.

2. Click the list menu button, and click Sort Ascending or Sort Descending.

   The contents of the table re-display in the sort order selected.

Required Fields

Fields with a red border on the left side are required. The following illustration shows the two fields required for creating a new source: Source Name and Type.

You cannot save changes on the page unless these fields contain valid data.

Auto Suggest for Lookups

Auto suggest displays a list of values that matches the characters entered in the text field of a lookup attribute. For example, if you type *Bo* in a lookup text field, the system displays a list of suggested values containing the string *Bo*. Select the appropriate value from the list. Adding additional letters to the string further narrows the suggestions.

List Display and Pagination on the Backlog page

A large product can have hundreds of user stories. By default, Agile Vision displays 50 user stories at one time on the Backlog page. To move forward and backward through the pages, click the navigation buttons at the top of the work area.

A pagination tool located at the top of the work area displays the user story count on the page and the total number of user stories for the product.

You can set the number of user stories you want to display on each page. If you navigate to another page you must reset it when you return.

To set the number of stories to display

1. Click the down arrow on the Show field.

2. Select the number of stories. The minimum number is ten stories. The maximum is 1000.

Create a Backlog Page Filter

On the Backlog page you can create and save a favorite or frequently used view filter, so that you don't have to reset the product backlog view each time. This becomes your default view on subsequent visits to the page until you change the settings or remove the filter.

To remove the filter, click Remove Filter

To create a filter

1. On the Backlog page, click Show Filter.

2. Select and clear the filters as needed.

3. Enter a name for the filter, and click Save.

Chapter 2: Using Agile Vision

This section contains the following topics:

How to Set Up Agile Vision

Before team members can participate on products in Agile Vision, the system administrator or super user must do the following prerequisite tasks:

1. Add Agile Vision users (see page 15)

2. Create a product (see page 8)

3. Create one or more releases as sub-items of the product (see page 17)

4. Create one or more sprints as sub-items of the release (see page 18)

5. Create a scrum team (see page 20)

6. Add team members to the scrum team (see page 21) Users must be members of a team on a product to create or edit objects for that product.

7. Create one or more themes (optional) (see page 23)

Add Users

Add an user as one of the following before adding them to a scrum team:

- Agile Vision user

- Product Vision user

- Agile Vision and Product Vision user

The Users page lists these users indicating if they are Agile Vision users, Product Vision users or both.

Note: The options to add an user as an Agile Vision user or Product Vision user are available only if the user has licenses for both.

To add a user

1. Go to the Administration menu and select Users from the Organization menu.

   The Users page appears.

2. Click New User.

    The User Edit page appears.

3. Complete the following fields:

    Salesforce User

    Defines the name of the user you want to add.

    Agile Vision

    Indicates if the user is an Agile Vision user.

    Product Vision

    Indicates if the user is a Product Vision user.

4. Click Save.

    The User Detail page appears. From this page you can edit the user and set up product notifications.

Create a Product

A product represents the end result and is the umbrella under which all the other components are grouped.

You must have appropriate access rights to create and edit products.

To create a new product

1. Go to the Administration menu and select Products from the Application menu.

    The Products page appears.

2. Click New Product.

    The Product Edit page appears.

3. Complete or edit the following fields as applicable:

    Product Name

    Specifies the unique name of the product.

    Limits: 80 characters

    Product Prefix

    Defines a unique prefix to be added to the product name. You cannot change the prefix after the product is created.

    Limits: 6 characters

Product Description

Defines the purpose of the product and relevant information, if any.

Limits: 32,000 characters

4. Click Save.

The Product Detail page appears.

Create a Release

A release contains all the functionality implemented in all the sprints since the last release. Therefore, a release contains one or more sprints.

Note: You can also click New Release on the Product Detail page to create a new release. When you create and save a release, an unique ID is automatically generated for it. You can use this ID to link this release to CA Clarity.

To create a release

1. Go to the Administration menu and select Releases from the Application menu.

The Releases page appears.

2. Click New Release.

The Edit Release page appears.

3. Complete the following fields.

Release Name

Specifies the name of the new release.

Limits: 80 characters

Start Date

Specifies the starting date for the release. To ensure the best burndown data for your release, this date must be at least as early as the start date of the first sprint in the release.

Required: Yes

Format: m/d/yy

Active

Specifies whether the release is active. Inactive releases do not appear as options in the filters throughout Agile Vision.

Default: Active

Product

> Specifies the unique name of the product.
>
> **Required:** Yes

Release Date

> Specifies the delivery date for the release. The release date and start date can be the same. To ensure the best burndown data for your release, ensure this date is at least as late as the end date of the last sprint in the release. Teams who do not know the release date when they start a release can update the release date as new sprints are added.
>
> **Format:** m/d/yy

Description

> Defines the purpose of the object and provides additional relevant information.
>
> **Limits:** 255 characters

4. Do one of the following:

   ■ To create the release, click Save.

     The Release Detail page appears. From this page you can edit release properties and create a sprint as a sub-item of the release.

   ■ To create the release and create additional releases, click Save and New.

     The release is created and the fields on the Edit Release page clear.

Create a Sprint

You can create a sprint from the Sprints page or from the Release Detail page.

After creating a sprint, a user with super user privileges can edit any of its properties including the start and end dates of a sprint if the sprint has not completed. Changing sprint dates causes burndown and velocity to be recalculated. The charts on Sprint Detail and Dashboard pages update accordingly. To edit a sprint, on the Sprints page, click Edit next to the sprint name you want to edit.

To create a new sprint

1. Go to the Administration menu and select Sprints from the Application menu.

   The Sprints page appears.

2. Click New Sprint.

   The Sprint Edit page appears.

3. Complete the following fields:

Sprint Name

Specifies the name of the sprint.

Required: Yes

Limits: 80 characters

Start Date

Specifies the starting date for the sprint. The sprint start and end dates must fall within the release start and end dates.

Required: Yes

Format: m/d/yy

Product

Specifies the unique name of the product.

Required: Yes

Active

Specifies whether the sprint is active. Inactive sprints do not appear as options in the filters throughout Agile Vision.

Default: Active

End Date

Specifies the ending date for the sprint. The sprint start and end dates must fall within the release start and end dates.

Required: Yes

Format: m/d/yy

Release

Specifies the name of the release the sprint is associated with.

Required: Yes

Goals

Specifies the expected results for the sprint.

Limits: 3000 characters

Risks

Specifies any factors that might affect the success or results of the sprint.

Limits: 2000 characters

4. Click Save.

The Sprint Detail page appears.

Create a Scrum Team

A scrum team can be assigned to one or more sprints. One or more scrum teams can be assigned to one product.

To create a new scrum team

1. Go to the Agile Vision menu and select Teams from the Resources menu.

   The Teams page appears.

2. Click New Team.

   The New Scrum Team page appears.

3. Complete the following fields:

   Scrum Team Name

   Specifies the name of the scrum team.

   Required: Yes

   Limits: 80 characters

   Active

   Specifies whether the team is active. Inactive teams are not presented as options in the filters through Agile Vision.

   Default: Active

   Expected Velocity

   Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

   This value becomes the default velocity for the team for each new sprint that they are assigned to. You can modify this value as needed by editing the sprint team on the Sprint Detail page.

   Story Point Scale

   Defines the story point scale your team uses. Enter a comma-separated list of numbers.

   Default: Fibonacci sequence 1 through 21

   Product

   Specifies the unique name of the product.

   Required: Yes

   Scrum Meeting Time/Location

   Specifies the time and location for daily scrum meetings.

Hours per Day

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

Scrum Team Domain

Specifies the Domain name or URL for the team.

4. Click Save.

The Sprint Assignment page appears.

5. Do one of the following actions:

■ To assign the team to sprints, select the check box next to each sprint you want to assign the team to, and click Add Team to Sprints.

■ Click Skip This Step to assign the team to sprints later. Note that by clicking Skip This Step, the team will not participate in the listed sprints. The team can be added to a sprint in the Sprint Information tab of the Sprint Detail page.

Note: After a scrum team is created, it is automatically added to any new sprints created for the product that the team is assigned to.

The Scrum Team Detail page appears. From this page you can edit team information and add members to the team.

Add a Scrum Team Member

A user must be an active Agile Vision user to participate as a team member. This step is important to ensure that the right users are participating on the product.

Important! In order to participate on a product (create and edit user stories, tasks, and so on), a user must be a member of at least one scrum team assigned to that product.

To add a new scrum team member

1. With the Scrum Team Detail page open, navigate to the Scrum Team Members section and click New Scrum Team Member.

The Scrum Team Member Edit page appears.

2. Edit the following fields.

Member Name

Specifies the user you want to add to the scrum team. The user names in the list are Salesforce.com users that have already been added as Agile Vision users.

Role

Specifies the member's role on the team.

Values:

- Member
- Scrum Master
- Product Owner

Team Member Notes

Specifies additional relevant information about the team member.

Limits: 255 characters

Scrum Team

Specifies the name of the scrum team to which the member is being added.

Default: The current scrum team

Required: Yes

Active

Specifies whether the team member is an active part of the team.

Default: Active

Allocation (%)

Specifies the percentage of time the member will be allocated to this team or product. If no value is specified, the team member is not considered in the team allocation charts.

Default: 0%

3. Do one of the following:

- To add the user to the team, click Save.

  The team member is added and you return to the Scrum Team Detail page.

- To add the user to the team and choose another user to add to the team, click Save and New.

  The Scrum Team Member Edit page appears.

Create a Theme

Themes are optional for products and can be created by any team member assigned to the product. Themes are containers for grouping similar user stories together. You can select multiple themes for a user story available for the selected product. If a user story is assigned to multiple themes, you can see the user story listed in each theme detail.

To create a theme

1. Go to the Agile Vision menu and select Themes from the Planning menu.

   The Themes page appears.

2. Click New Theme.

   The Theme Edit page appears.

3. Complete the following fields.

   Theme Name

   Defines the name of the new theme.

   Required: Yes

   Limits: 80 characters

   Product

   Specifies the name of the product that the theme is a part of. A user can select only products on which they are a team member.

   Required: Yes

   Description

   Specifies information about the theme.

   Limits: 500 characters

4. Do one of the following:

   ■ To create the theme, click Save.

      The Theme Detail page appears. From this page you can edit general theme settings and associate user stories with the theme.

   ■ To create the theme and then create additional themes, click Save and New.

      The theme is created, and the fields on the Theme Edit page clear.

Build the Product Backlog

After the basic product components are created and the scrum team members and team velocity are defined, the system administrator or team members of a product create epics and user stories for the product backlog. User stories define the feature or functionality to be developed. An epic can contain multiple user stories.

Product backlog tasks can be easily carried out on the Backlog page. In the standard or default view, the product backlog displays an ordered list of current and upcoming user stories and issues for a product.

The hierarchy view of the backlog displays higher-level epics and the underlying user stories and tasks.

Only product members can view the backlog for that specific product. Only users who are assigned to the product can create and edit epics, user stories, issues, and tasks. They can also rank the product backlog.

Create Epics

You must be a member of a product for which you are creating an epic or an administrator.

You can also create an epic from the Epics list page.

To create an epic

1. Go to the Agile Vision menu and select Backlog from the Planning menu.

2. Display the backlog for the product for which you want to create an epic.

3. Click Hierarchy View in the header area.

   The backlog appears in the hierarchy view.

4. Click New Epic.

   The New Epic popup appears.

5. Complete the following fields:

   Title

   Defines the name of the epic.

   Assignee

   Defines the team member who owns the epic.

   Points

   Defines the number of points estimated to complete the epic. Point values must be expressed as integers. Decimals are not allowed.

Priority

Defines the importance of the epic in the product.

Values: Very High, High, Medium, Low, Very Low, Not Prioritized

Status

Defines the current status of the epic.

Values: Planned, In Progress, Completed, Closed

Team

Defines the scrum team assigned to complete the epic.

Theme

Defines the theme that the epic is a part of.

Description

Defines the purpose of the epic and provides other relevant information.

6. Save your changes and close.

The new epic is added to the epics list.

Create User Stories

To create a user story on the Backlog page

1. Go to the Agile Vision menu and select Backlog from the Planning menu.

2. Display the backlog for the product for which you want to create the story.

3. Click Add User Story.

The User Story Edit page appears.

4. Complete or edit the following fields as needed.

Title

Specifies the name of the user story.

Required: Yes

Limits: 255 characters

Example: Many Agile teams use the format: "As a ____ I want to ____ so that ____". For example, "As a user, I want to see home page when I log in so that I can view my current tasks". Follow your organization's convention.

Status

Specifies the user story's current status.

Values

■ Planned

■ In Progress

■ Completed

■ Closed

■ **Default**: Planned

Priority

Specifies the user story's importance in the product.

Values:

■ Very High

■ High

■ Medium

■ Low

■ Very Low

Default: Medium

Story Points

Defines the number of points estimated to complete the user story. Point values must be expressed as integers. Decimals are not allowed.

Assignee

Specifies the team member who owns the user story.

Note: You can assign the user story to an Agile Vision user who is not a member of the scrum team that owns the story.

Example: A member of another team is needed to do code review.

Epic

Defines this user story as the child of an existing epic. You can move a user story from one epic to another from the edit page of the user story.

Description

Defines the purpose of the user story and provides additional relevant information.

5. In the Product Details section, complete or edit the following fields as needed:

   Product

   Specifies the unique name of the product.

   Release

   Specifies the release to associate the user story with.

   Sprint

   Specifies the sprint in which the user story is completed.

   Theme

   Specifies the themes that the user story is part of. The user story is listed on detail pages of all the selected themes.

   Team

   Specifies the scrum team assigned to complete the user story. The list of available teams is limited to those assigned to the sprint.

   Default: None

6. Click Save.

   The User Story Detail page appears. From this page you can view and manage all information relating to the story, and create tasks as sub-items of it.

Create Tasks

Generally, a user story is broken down into one or more tasks. Tasks are items of work that one or more team members perform during a sprint.

Tasks display on the Backlog page and in User Stories & Charts on the Sprint Detail page underneath their parent user story. Tasks are also displayed as cards on the Virtual Wall in the *S*print Detail page. You can click a task title to display its details.

To create a task on the Backlog page

1. In the product backlog section of the Backlog page, expand the user story for which you want to create a task.

2. Click New Task.

   The Create/Edit Task pop-up appears.

3. Complete the following fields, and click Save.

   Task Title

   Defines the name of the task.

   Required: Yes

Status

Specifies the current state of the task.

Values:

- Planned
- In Progress
- Completed
- Closed

Default: Planned

Assignee

Specifies the team member responsible for completing the task.

Default: The assignee for the user story, if specified.

Team

Defines the team assigned to the task.

Default: The team assigned to the user story, if specified.

Estimated Hours

Defines the number of hours estimated to complete the task. This includes any hours already logged.

Type

Defines the type of task.

Values:

- Implementation
- QA
- Doc
- Design
- Other

Default: None

Create Issues

To create an issue

1. From the Backlog page, display the Agile Vision product for which you want to create an issue.

2. Click New Issue.

   The New Issue pop-up appears.

3. Complete the following fields:

   Title

   Defines the issue title.

   Points

   Defines the number of points estimated to resolve the issue. Point values must be expressed as integers. Decimals are not allowed.

   Status

   Defines the status of the issue.

   Priority

   Specifies the importance of the issue in relation to the product.

   Severity

   Specifies the severity of the issue in relation to the product.

   Assignee

   Defines the assignee for the issue. The assignee must be a project team member.

   Description

   Defines the description for the issue.

   Steps to Reproduce

   Defines the steps to reproduce the issue in Agile Vision.

   Expected Result

   Defines the result expected by the user after performing the given steps to reproduce the issue.

   Actual Result

   Defines the result the user actually sees after performing the given steps to reproduce the issue.

Workaround

Defines the workaround for this issue.

Affected Release

Defines the release affected by this issue. The available releases are based on the product associated with the issue.

Fix Release

Defines the release in which this issue will be fixed. The available releases are based on the product associated with the issue.

Sprint

Defines the sprint in which this issue will be fixed. The available sprints are based on the selected fix release.

Scrum Team

Defines the team assigned to the issue. The available scrum teams are based on the project associated with the issue.

Theme

Defines the themes associated with the issue. If the issue is linked to an user story, then the theme is the same as the one assigned to the user story.

4. Click Save and Close.

Plan the Sprint

Teams use the sprint backlog section of the Backlog page to plan their upcoming sprints. Click the Show Sprints link (left-facing black arrow) to open the sprint backlog panel. Click the right-facing black arrow link (Hide Sprints) to close the panel. You can filter the sprint backlog by release, sprint, and team.

Your filter settings become the default view on subsequent visits to the page and persist until you change them. The available releases are those associated with the current product in the product backlog.

When planning a sprint in the sprint backlog, users can move user stories from the product backlog into a sprint, assign team members to user stories and tasks, and view their team's sprint velocity.

See the online help for more information about the sprint backlog and sprint planning.

Move a User Story from the Backlog to the Current Sprint

The Backlog page simplifies sprint planning by enabling you to drag and drop user stories from the product backlog into a sprint.

To move a user story from the product backlog to the current sprint

1. In the Backlog page, display the backlog for the product you want to work with.

2. Click the Show Sprints link (left-facing black arrow) to display the sprint backlog, and filter the view to display the backlog for the sprint you want to work with.

3. Select the release, sprint, and team you are planning for. You must select a release and sprint. You can view all teams participating on the sprint, or one team. If you select a team, you can view the velocity chart for the team. If you view all teams, the velocity chart does not display.

4. Click and drag a user story from the product backlog and drop it onto the sprint backlog.

   The user story is added to the sprint backlog, the team velocity chart is updated, and the sprint is updated in the product backlog and user story detail.

   Note: A user story with no story points is not calculated in the sprint capacity.

Create a Task in the Sprint Backlog

When a user story is added to the sprint backlog section of the Backlog page, you can expand the story and create tasks for it, specify hours, and assign team members. The procedure is the same as creating a task in the product backlog. In the sprint backlog, you can see the team allocation chart update immediately. The assignee's available hours is pulled from the Allocation % specified for the team member.

Remove a User Story from a Sprint

You can remove a user story from a current or upcoming sprint and return it to the product backlog so that it can be assigned to another sprint.

To remove a user story from the current sprint

1. Go to the Agile Vision menu and select Backlog from the Planning menu.

   The Backlog page opens.

2. Select the product you want to work on in the Filter tool.

3. Display the sprint backlog panel and select the sprint that contains the user story you want to remove.

4. Click the Remove icon next to the user story you want to remove.

   The story is removed from the current sprint. This is reflected in the page by the following actions:

   ■ The user story disappears from the sprint backlog

   ■ The sprint information disappears from the user story in the product backlog

Manage User Stories and Tasks

Teams use the Sprint Detail page to manage the user stories and tasks being delivered for the sprint, and to track progress. The Sprint Detail page contains the following tabs:

■ Sprint Information. Displays all information relating to a sprint including general information, goals and risks, sprint metrics, retrospective comments, user stories and teams assigned to it.

■ User Stories & Charts. Displays all of the sprint's user stories. Team members can expand user stories to see their associated tasks. Clicking a task title displays its task details.

■ Virtual Wall. Enables team members to manage tasks graphically. They can view all user stories and tasks committed for the sprint and can edit tasks and update their status right in the page.

Create a Task on the Virtual Wall

You can quickly add tasks without leaving the Virtual Wall.

To create a task in place on the Virtual Wall

1. Go to the Agile Vision menu and select Sprint Detail from the Planning menu.

2. Display the details for the sprint that the user story is a part of, and go to Virtual Wall.

3. Click New Task for the user story to which to want to add a task.

   A new task card is added to the user story.

4. Double-click the task card below the name.

    The task card redisplays with fields that you can edit.

5. Complete the fields

    a. Clear the top field and enter a task title.

    b. Enter the name of the team member who will be assigned to the task in the second field.

    c. Enter the number of hours estimated to complete the task.

    d. If the task is already started, enter the number of hours worked.

    e. If the task is already started, click the right arrow button to change the task status from Planned to In Progress.

6. Click the check button to save your settings.

Update Task Status on the Virtual Wall

The Virtual Wall enables you to drag and drop tasks to update their status.

Dragging a task to a new status changes only the status. Edit the task to update the hours completed on it to reflect the burndown accurately. However, when you drag a task to a Completed status, any remaining hours on the task are zeroed out automatically.

To update task status

Do one of the following:

- Drag the task card and drop it in the appropriate status column (for example, from In Progress to Completed).

- Double-click the task card and use the buttons at the bottom of the form to move the card to the appropriate status.

- Click the title of the task at the top of the task card and edit the Status field on the Task Edit page.

The task status updates immediately and the burndown calculations and team allocation are updated.

Change User Story Status

As a user story progresses from planning to completion, you can update the status on the User Story Edit page.

To change user story status

1. Go to the Agile Vision menu and select Sprint Detail from the Planning menu.

2. Filter the view to display the sprint that contains the user story you want to work on.

3. Click Edit for the user story you want to update.

4. In the Status field, select the new status and click Save.

Track Daily Progress on Sprint Tasks

Team members, product owners, and management can monitor sprint tasks and track team member progress by doing the following:

- Viewing and updating comments and notes in Sprint Information and User Story Detail

- Viewing sprint progress charts and reports in the Dashboard page and User Stories & Charts in the Sprint Detail page

- Discussing task status in daily stand-ups

- Leveraging the Virtual Wall to update task progress

User Stories and Charts on the Sprint Detail page displays several charts to provide a comprehensive report of sprint progress. You can filter the view by product, sprint, and team.

Hours Burndown

An hours burndown chart compares the actual hours the team(s) burned on user stories against the expected burndown for the sprint.
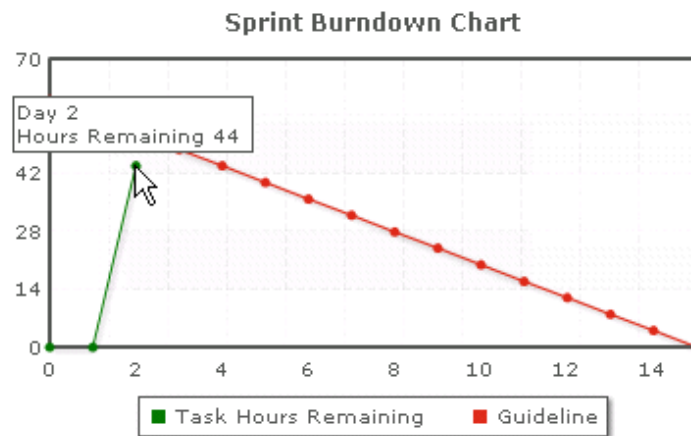
The x axis shows the days in the sprint. All days, including weekends, are considered valid workdays. The y axis shows the task hours in the sprint. Actual hours remaining displays as a green line. The expected burndown, or guideline, displays in red. Each point on the lines is a data point representing a day in the sprint. Hover text on remaining hours data points displays the sprint day and the remaining effort. Hover text on the guideline data points displays the sprint day and the remaining planned effort.

Points Burndown

A points burndown chart compares the remaining story points the team(s) completed against the expected burndown. Like the sprint burndown, the actual burndown line is green and the guideline is red.

Each data point on the actual burndown line represents a day in the sprint. The daily point burndown reflects the points remaining for that day and any new point estimation (for example, user stories added, removed or changes in user story points). A tool tip on the actual burndown line displays the sprint day and the number of points remaining in the sprint.

Team Member Allocation

A team member allocation chart. For each team member, the chart displays their total capacity for the sprint, remaining hours to date, and a time allocation bar chart.

The bar chart compares team member capacity against actual assigned hours. The bar displays green for properly allocated time (80 to 100% of capacity), blue if under-allocated, and red if over-allocated. Hover text on a bar displays remaining available hours, remaining assigned hours, and % of time (%actual, $total).

The Dashboard page contains four charts. Each chart can be filtered individually to create a specific view of a burndown or velocity chart for a product. For example, a user can create the following charts:

- An hours burndown chart for Release 1 of Product A for one team

- A points burndown chart for Sprint 2 of Product B for all teams

- A velocity chart for one team for Product C

- An hours burndown chart for Product C for one team

Display Charts on the Dashboard Page

Team members and other users can quickly create charts to view the current status of products.

To display charts

1. Go to the Agile Vision menu and select Dashboard from the Overview menu.

2. Click the filter icon in the right-hand corner of a chart window.

    The Chart Options filter appears.

3. Select the product you want to view. This value is required.

4. Select the release you want to view. This value is required.

5. To view sprint or team progress, select a sprint and team.

6. Select the type of chart you want to view (hours, points, or velocity), and click Apply

    The requested chart displays. Your selections persist until they are changed.

Appendix A: Third-Party Acknowledgements

This section contains the following topics:

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