

# CA Clarity Agile

## User Guide

Winter 2013



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## CA Technologies Product References

This documentation set references the following CA Technologies brands and products:

- CA Clarity Agile
- CA Clarity Requirements
- CA Clarity PPM
- CA Clarity Ideation
- CA Software Change Manager

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# Chapter 1: Introduction

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This section contains the following topics:

[CA Clarity Agile](#) (see page 9)

[Audience](#) (see page 10)

[Log in to CA Clarity Agile](#) (see page 10)

[Getting Started](#) (see page 10)

[Change Language and Locale Settings](#) (see page 11)

[Search for an Object](#) (see page 11)

## CA Clarity Agile

CA Clarity Agile enables you to manage projects that follow the scrum methodology in an intuitive and simple manner. Agile teams can plan the product releases based on the date, demand, and the capacity. The product is web-based, so you can participate in sprint planning, and view or update status from wherever you are located.

Using CA Clarity Agile, you can do the following tasks:

- Create and monitor sprints using a timebox approach, and according to demand and capacity
- Create, update, and decompose stories while supporting role-based access to rank and assign them to team members
- Facilitate daily standup meetings
- Create burndown charts
- Calculate team velocity
- View and manage backlog/task status

**Note:** To use this guide, familiarity with scrum methodology and agile terminology is required.

## Audience

This guide is intended for anyone who uses the product on a daily basis to manage agile projects, including the following users:

- Product Owner (also can be the business analyst) – This person is responsible for maintaining the product including release schedules, features, and requirements. The Product Owner also reviews the product roadmap based on both master and sub-releases and represents the stakeholders and the business.
- PMO (project management office or similar role) – This person is in charge of adhering the organizational processes for setting up projects and rolling them up to portfolios, and so on. Often, this job is de-centralized, but for the purpose of this exercise, we have summarized it to a single user.
- Scrum Master (or Agile project manager) – This person is in charge of the user stories and the backlog. A Scrum Master creates sprints, manages team assignments, and monitors the status of the agile projects.
- Development Team – This user is responsible for the day-to-day work of the sprint project. In Agile Planning, the development team creates the tasks, updates the task status (with hours and estimates), creates issues, and gives feedback on success to the scrum master.
- Portfolio Manager (also could be business or stakeholder) – This person is responsible for seeing the roll-up of the agile projects with the traditional projects.

## Log in to CA Clarity Agile

Your CA Clarity Agile administrator prepares the product so that you can use it on a daily basis to manage your projects. After your administrator prepares the product, they will provide you with the URL and login credentials for you to log in.

## Getting Started

All users logging in to CA Clarity Agile are directed to the home page, which contains a list of open tasks that are assigned to the user.

### How Do I Start?

To help you with the common tasks while using CA Clarity Agile, click the link for the *Scenarios Guide*. The *Scenarios Guide* provides a list of role based tasks involved in creating and managing a product in CA Clarity Agile.

## Change Language and Locale Settings

The administrator can change the locale settings for all pages in Salesforce.com.

When changing the locale settings, change both the locale and language values at the same time. Changing both settings helps with consistency for date and time formats, and screen text. The default locale setting is English (United States) format.

For example, change the language to Deutsch for the German locale, so that the date and time formats appear correctly in all pages.

### Follow these steps:

1. Log in to Salesforce.com as the administrator, and click Setup.  
The Personal Setup page on salesforce.com appears.
2. Expand My Personal Information and click Personal Information.  
The User Detail page opens.
3. Click Edit.
4. Scroll to the Locale settings.
5. Change the Locale value to the appropriate country name.
6. Change the Language value to the appropriate language name.
7. Click Save.  
The text values and time and date formats change to the selected language and locale.
8. Click the CA Clarity tab to return to the home page.

## Search for an Object

Based on your access rights, you can search on objects (for example, products, features, releases, sources, personas) for the product. A system administrator can search on objects across all products. The search option is available at the top-right of your workspace.

**Note:** There can be a slight delay when indexing newly created items for searching. Search can take up to several minutes before a new item displays in the search results.



# Chapter 2: List Pages

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The CA Clarity Agile and CA Clarity Requirements pages have a number of convenient features to help you set up and manage your products more easily. The setting for the number of records to display on a list page is persisted for each browser and for each user. If you view the same list in a different browser, set this value again.

This section contains the following topics:

[Edit List Page Fields](#) (see page 13)

[Configure Columns for a List Page](#) (see page 13)

[List Page Filters](#) (see page 14)

[Recover Deleted Items](#) (see page 16)

## Edit List Page Fields

Many fields on list pages can be edited inline, saving clicks to get to the detail page of the list item you want to change.

### Follow these steps:

1. Click in a list page field to begin editing. If the field can be edited inline, it activates for you to change values.

When you change a field value, a small red triangle appears in the upper left of the field indicating the updated value.

2. Save your changes.

**Note:** Fields that cannot be edited in-place include fields that have more than one value. If you sort or group by a column field with multiple values, the sort function sorts for each of the values in the column field. You cannot edit the value of the field in-place because the changes impact multiple objects.

## Configure Columns for a List Page

You can select the columns that display on some list pages. You can remove the default columns and can add the columns that you want. If you add custom fields (attributes) for a CA Clarity Agile object, the custom fields are available to add to the list pages as columns.

For example, if you add custom fields for releases, the custom fields become available for the releases list page.

Adding custom fields to a list is a customization. The changes are persisted only for the logged-in user across sessions.

You can configure the list pages for each view. When configuring, the attributes are filtered based on the selected product. You can select from default and product-specific attributes.

**Follow these steps:**

1. Open the list page and click Configure.  
The Configure View window appears.
2. Move the appropriate column into or out of the Selected list box using the left and right arrow keys.  
Order the columns on the list page by selecting the field in the Selected list box and using the up and down arrow keys. You can also use drag-and-drop to move the columns between the boxes or up and down inside a box.
3. Click Save.

## Restore Configuration Defaults for a List Page

If you have configured columns for a list page, you can restore configuration defaults.

**Follow these steps:**

1. Open the list page and click Configure.  
The Configure View window appears.
2. Click Restore Defaults.

## List Page Filters

List pages have a filter below the header that lets you control what you view on the page. All filters that are created for a list page appear in the Filters drop-down list for selection. The current filter in use on the list page shows in the Filters field.

Note the following points about filters:

- When you filter, the selection criteria remain in effect for the list page. If you leave the list page and return, the list is prefiltered with the selection criteria from the filter.
- Any filter that you create is automatically saved.

- You can edit and remove filters that you have created.
- To override the filter criteria for the list page and show the entire list, click Clear Filter.
- Filters are saved across sessions per browser. If you switch to a different browser, reselect a filter to apply it.

## Manage a List Page Filter

List pages filter lets you control what you view on the page. Consider the following information about filters:

- When you filter, the selection criteria remain in effect for the list page. If you leave the list page and return, the list is prefiltered with the selection criteria from the filter.
- Any filter that you create is automatically saved.
- Filters are saved across sessions for each browser. If you switch to a different browser, reselect a filter to apply it.
- You can create and save multiple filters.
- To override the filter criteria for the list page and show the entire list, click Clear Filter.

### Follow these steps:

1. Open the list page that you want to filter.
2. Click Add/Edit Filter.
3. Select the Create a new filter option.
4. In the Properties section, enter a name in the Filter Name field.
5. Make selections in the drop-down lists to define filter criteria.
6. Click Add to define additional criteria.
7. Click Filter when you are done.

The list page is filtered using the criteria that you defined, and the filter is saved automatically.

**Note:** To edit or delete a filter, click Add/Edit Filter, select Show Existing Filters, edit the filter, or click Delete.

## Recover Deleted Items

If you accidentally delete an item on a list page, you can recover it from the Recycle Bin.

**Follow these steps:**

1. Click Setup  
The personal setup page appears
2. Click Home and go to the Recycle Bin.
3. Select the desired items and click Undelete.

# Chapter 3: The Product Backlog

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This section contains the following topics:

[How to Build the Product Backlog](#) (see page 17)

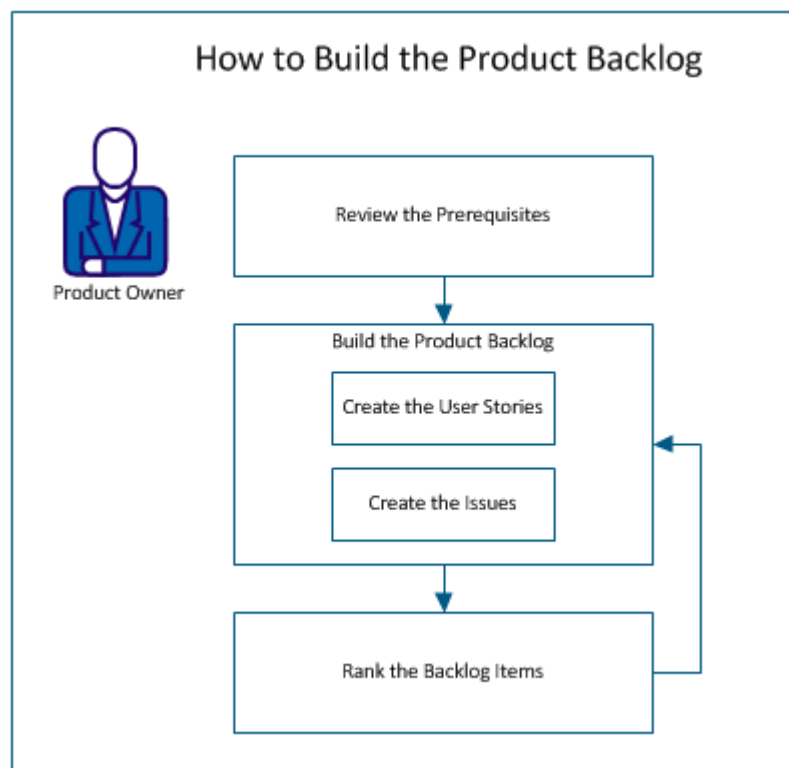
[Bulk Update](#) (see page 19)

## How to Build the Product Backlog

Building a product backlog is a continuous process of collecting requirements, customer feedback, and open defects for the product. The product owner builds and manages the product backlog regularly by receiving feedback from customers and understanding their requirements.

For example, for a product Parking Pass Management System, the requirements include the online purchase of passes and payment modes to purchase the passes. These requirements are the backlog items for the product.

The following diagram describes how a product owner builds the product backlog.



Perform these steps to build the product backlog:

1. [Review the Prerequisites](#) (see page 18)
2. Build the Product Backlog
  - [Create the User Stories](#) (see page 18)
  - [Create the Issues](#) (see page 18)
3. [Rank the Backlog Items](#) (see page 19)

## Review the Prerequisites

Before you build the product backlog, verify that the product is set up in CA Clarity Agile. The product acts as a placeholder to capture all the required features. For example, Parking Pass Management System is the name of the product. Any required feature or issue for this product is added under it.

## Create the User Stories

Create a user story to track the work that is associated with the requirement. A user story describes a feature or functionality requirement for the product. Include enough information in the user story for the team to provide an estimate of the work effort that is required to implement it.

For example, for the product Parking Pass Management System, create a user story named Pay Parking Pass by Credit Card. Include details of the requirement in the user story, such as mask the field for card security code.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New User Story.
4. Complete the required information.
5. Save your changes.

## Create the Issues

You can add issues to the backlog items to track the work that is associated with fixing defects. Defects are the bugs in the product that are observed when using the product. For example, create an issue Unable to Send the Parking Pass Expiration Message. Provide details of the issue such as steps to reproduce the issue and the expected results.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New Issue.
4. Complete the required fields.
5. Save your changes.

## Rank the Backlog Items

Ranking backlog items in the order in which you want the work completed helps to plan the backlog items for a release. The values in the Rank # column in the backlog list indicate the order of work.

For example, rank the user story “Pay Parking Pass by Credit Card” higher than the user story “Pay Parking Pass by PayPal”.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Enable Ranking, if you do not see the Rank # column.

**Note:** This button is hidden if the Rank # column is visible.

4. Click the Rank # field for the user story or issue, and enter the new rank number.  
The backlog item is moved to the new place in the list.

**Note:** You can also rank backlog items by dragging and dropping them in the required order.

You have successfully built the product backlog. Repeat the scenario to add more user stories and issues. As you add more items to the product backlog, you can change their ranking in the order in which you want the work completed.

## Bulk Update

On the Backlog page, you can update more than one item at a time. Updating in bulk is useful for editing a specific attribute across multiple user stories or issues instead of updating each item individually.

For example, use the bulk update to assign multiple items to a sprint or release. You can also use it to select an owner for multiple items at the same time.

When using bulk update, you can:

- Select a maximum of 250 user stories or issues to update at a time.
- Assign an issue to a maximum of ten fix releases and ten affected releases when updating in bulk.
- Select either user stories or issues for the bulk update. You cannot combine both types of items.
- Leave an attribute value as blank or as Select a Value to avoid updating the field for all the selected items.
- Select Unselected to change a field value to Unselected for all the selected items. For example, if you select Unselected for the Release attribute, no release is specified for any user stories or issues in the bulk update.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select multiple user stories or issues.
4. Right-click the selected items, and click Bulk Update. You can also click the Bulk Update button.

The bulk update pop-up appears.

5. Edit the required fields.
6. Save your changes.

The fields for each backlog item display the updated values.

# Chapter 4: Release Plan

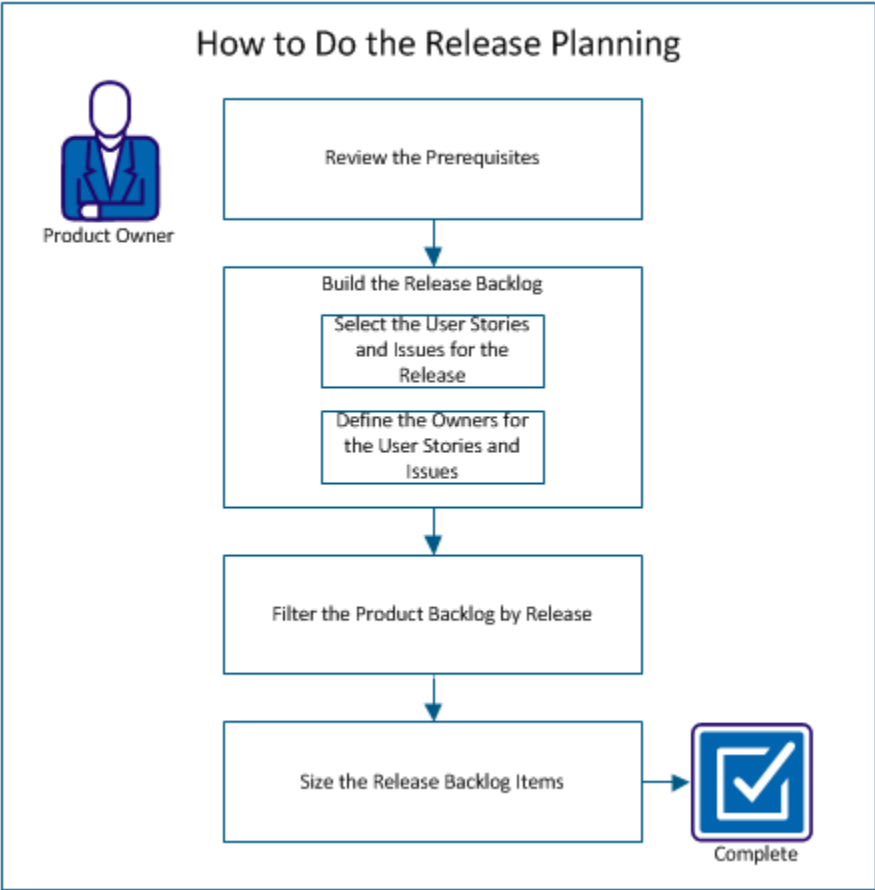
This section contains the following topics:

[How to Do the Release Planning](#) (see page 21)

## How to Do the Release Planning

The release planning involves building the release backlog. The product owner identifies the high ranking product backlog items to build the release backlog. The product owner then discusses the release backlog items with the team.

The following diagram describes how a product owner performs the release planning.



Perform these steps to plan a release:

1. [Review the prerequisites](#) (see page 22).
2. Build the release backlog.
  - [Select the user stories and issues for the release](#) (see page 22).
  - [Define the owners for the user stories and issues](#) (see page 23).
3. [Filter the product backlog by release](#) (see page 23).
4. [Size the release backlog items](#) (see page 24).

## Review the Prerequisites

To do the release planning, verify that the following items are set up in CA Clarity Agile:

- The product backlog.
- The release.

## Select the User Stories and Issues for the Release

The product owner identifies the high ranking product backlog items for the release and discusses the items with the team. For example, in the Parking Pass Management System, the product backlog includes the following items:

- Purchase parking pass online
- Pay parking pass by credit card
- Pay parking pass by PayPal
- Add photo identity to parking pass

The product owner can identify the first three items in the ranking order and can associate them to the release.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.

3. Choose one of the following options:
  - Select a user story or issue, and choose one of the following actions:
    - Click Details, and select the release name.
    - Click in the Release column, and select the release name.
  - Select multiple user stories or issues, and choose one of the following actions:
    - Right-click the selected items, click Bulk Update, and select the release name from the drop-down list.
    - Click Bulk Update, and select the release name from the drop-down list.
4. Save your changes.

## Define the Owners for the User Stories and Issues

The owner of a user story or issue is responsible for completing the work that is associated with the story. You can assign a user story or issue to more than one owner.

For example, Pay Parking Pass by Credit Card user story can be assigned to two software programmers. The two programmers work together to complete the user story. While one programmer writes the code for the feature, the other programmer reviews the code, and they switch roles frequently.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select the user story and click Details.
4. Select owners of the user story.
5. Save your changes.

## Filter the Product Backlog by Release

Filter the product backlog page to display the user stories and issues that are associated with the release. For example, in the Parking Pass Management System, filter the backlog page to display only the items that are identified for the release:

- Purchase parking pass online
- Pay parking pass by credit card
- Pay parking pass by PayPal

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Add/Edit Filter.
4. Select Create a new filter.
5. Enter the Filter Name to identify the release.
6. Select the appropriate values from the drop-down list to define the filter criteria for the release.
7. Click Filter.

The backlog page is filtered to display the release backlog.

## Size the Release Backlog Items

Sizing helps you understand the effort that is required to complete a user story. You use points as the unit to estimate the relative size of stories.

For example, the Purchase parking pass online user story takes more effort to complete than Pay parking pass by credit card user story. Assign more points to Purchase parking pass online.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select the user story and click Details.
4. Enter the points.
5. Save your changes.

**Note:** You can also edit the points inline on the backlog page to estimate the relative size of stories.

You have successfully completed planning a release. The team can now use the release backlog to build the sprint backlog.

# Chapter 5: Themes

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Themes are sometimes used in agile development to group related user stories together. The Themes page displays a list of all themes that are created, and their descriptions.

This section contains the following topics:

[Manage a Theme](#) (see page 25)

## Manage a Theme

Themes are optional for products and any team member that is assigned to the product can create them. Themes are containers for grouping similar user stories together. You can select multiple themes for a user story. If a user story is assigned to multiple themes, you can see the user story listed in each Theme Details page.

**Follow these steps:**

1. Click Agile, and from Planning, click Themes.  
The Themes page appears.
2. Click New Theme.
3. Complete the requested fields.
4. Save your changes.

**Note:** To edit or delete a theme, from the Themes page, select the theme, and click Details or Delete. You can also add a user story from a theme.



# Chapter 6: Epics

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An *epic* organizes user stories that span multiple releases and sprints in a product. For example, you can create an epic that contains user stories for integrating tools with your product, or that groups user stories for supporting multiple currencies.

This section contains the following topics:

[Manage Epics](#) (see page 27)

[Manage User Stories from Epic](#) (see page 28)

[Copy User Story to Create Epic](#) (see page 28)

[Epic Hierarchy](#) (see page 29)

## Manage Epics

To manage Epics, you must be either a team member that is assigned to the product for which you are creating an epic or an administrator.

You can assign an epic to a [theme](#) (see page 25). The theme can contain user stories and other epics that are related to features within a product, such as user interface changes. If you also use CA Clarity Requirements, you can link an epic to a requirement. Linking an epic and requirement associates the requirement to a group of user stories that span multiple release or sprints.

### Follow these steps:

1. Click Agile, and from Planning, click Epics.  
The epics list page appears.
2. Select the product for which you want to create the epic.
3. Click New Epic.
4. Complete the requested fields.
5. Save your changes.

The new epic is added to the epics list.

**Note:** To edit or delete an epic, select the epic from the epic list page, and click Details.

You can delete an epic if you are a member of the product that it is a part of. When an epic is deleted, the child user stories are not deleted. Deleting an epic has no effect on burndown charts.

## Manage User Stories from Epic

You can manage user stories from the Epic page by adding new or existing user stories, or removing a user story.

You can add multiple user stories to an epic provided they are not already the children of other epics. The user stories can span multiple sprints and releases but must belong to the same product as the epic.

**Follow these steps:**

1. Click Agile, and from Planning, click Epics.  
The epics list page appears.
2. Select the product for which you want to edit the epic.
3. Click Details for the epic to which you want to add user stories.
4. In the User Stories section, click Add Child Story.
5. Select the user story to add.
6. Save your changes.

**Note:** To add a child story, delink a user story from an epic, or delete a user story from the Epic Details page, click Add Child Story, Remove Link, or Delete.

## Copy User Story to Create Epic

You can create an epic from a user story by copying the information from the user story into the epic. The values from the user story become the default values for the epic. You can change all the values for the epic except the product.

The user story becomes the child of the new epic by default. If the user story is already a child of another epic, it is delinked from the other epic and it is linked to the new epic.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story that you want to copy to an epic.
4. Click Copy to Epic, and edit the appropriate fields.
5. Save your changes.

## Epic Hierarchy

The Epic Hierarchy page displays epics with the associated user stories and tasks. The hierarchy view displays the following items and their detail for the selected product:

- Epics at the topmost level.
- User stories at the next level.
- Tasks at the lowest level.

**Follow these steps:**

1. Click Agile, and from Planning, click Epic Hierarchy.
2. Click New Epic.
3. Complete the requested fields.
4. Save your changes.

The new epic is added to the hierarchy.

**Note:** You can similarly add user stories to epics and tasks to the user stories. To edit or delete the items from the Epic Hierarchy page, click Details for the item.



# Chapter 7: User Stories

---

A user story describes a feature or functionality that the team commits to delivering. You can work with user stories from the Backlog and the Sprint Backlog & Charts pages, as well as from the Epic Hierarchy and Theme Details pages. CA Clarity Requirements users can work with user stories from the details page of requirements. You can associate a user story with only one product.

This section contains the following topics:

[Manage User Stories](#) (see page 31)

[Acceptance Criteria](#) (see page 32)

[User Story Dependencies](#) (see page 32)

[Add a Note or Attachment to a User Story](#) (see page 34)

[Link to Issues](#) (see page 34)

[Link to Quality Center Test Cases](#) (see page 35)

[CA Software Change Manager Package Information](#) (see page 36)

[Add Comments to a User Story](#) (see page 37)

[Assign a Team Member to a User Story](#) (see page 38)

[Close a User Story](#) (see page 38)

[Manage User Stories Integrated with CA Clarity PPM](#) (see page 39)

[Delete a User Story](#) (see page 39)

[Clone User Stories with Tasks](#) (see page 40)

## Manage User Stories

Create a user story to track the work that is associated with the requirement. A user story describes a feature or functionality requirement for the product. Include enough information in the user story for the team to provide an estimate of the work effort that is required to implement it.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New User Story.
4. Complete the requested fields.
5. Save your changes.

**Note:** To edit or delete a user story, select the user story from backlog page, and click Details or Delete.

## Acceptance Criteria

Acceptance criteria define the requirements for a user story for the stakeholders and the clients acceptance. You can define the acceptance criteria that the team uses to determine whether the user story is completed.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details link for the user story for which you want to create acceptance criteria.
4. In the Acceptance Criteria section, click New Acceptance Criteria.
5. Complete the requested fields.
6. Save your changes.

**Note:** To edit or delete an acceptance criteria, from the Acceptance Criteria section, click View or Edit.

## User Story Dependencies

Sometimes a user story requires the delivery of another user story or its functionality before it can be implemented. For example, a user story that provides access to online help depends on the completion of the user story for a Help button. A user story can also be depended on by another story.

- A *dependent story* is the story that depends on another story.
- A *story dependency* is the story on which another story depends.

The user story dependency must be in the same product.

## Manage a User Story Dependency

You can create dependency for a user story to identify the requirements that a user story has on another story.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story for which you want to create a dependency.
4. In the Dependencies for this User Story section, click New Dependency.

5. Complete the requested fields
6. Save your changes.


The user story detail updates to reflect the dependency details.

After you create a dependency, the details page for the other user story displays information about the relationship in the Dependencies section.

## View Dependency Flags and Tool Tips

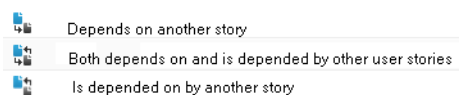
User stories with dependency relationships have the following indicators to flag the relationship:

- The details page for a user story displays a message indicating active dependencies.



This story has dependencies.

- List pages show icons to indicate dependency relationships. You can see the dependency flags for a user story from the backlog, sprint backlog, and other lists that show user stories. For example, the Flag column on the Backlog page shows icons that indicate one of the following dependency relationships:



Hover over the dependency icon to open a tooltip that lists the user stories in a dependency relationship with the flagged user story.

Click the user story link in the tooltip, to open the User Story Details page for the user story.

When a story dependency closes, the following indicators change:

- The message section in the User Story Details page disappears. If the dependent story depends on other open stories, the message continues to display.
- The icon for the dependency relationship disappears from the Flag column in list pages such as the backlog, unless the story has additional dependencies.

## Add a Note or Attachment to a User Story

You can add notes or attachments to a user story so that the team members can view them.

For example, for a user story to add a drop-down list to the interface, add notes explaining the details to display in the list.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story you want to work with.
4. In the Notes and Attachments section, perform one of the following actions:
  - Click New Note and complete the requested fields.
  - Click Attach File and browse to the required file.
5. Save your changes.

## Link to Issues

You can link a user story to an existing issue in the product. The issue can be a generic issue created in CA Clarity Agile or an integrated issue that is imported from JIRA.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click the Details link of the user story you want to work with.  
The User Story Details page appears.
4. Scroll to the Issues section and click Link to Issue.
5. Select an issue from the Issues drop-down list.
6. Save your changes.

The selected issues are listed in the Issues section on the User Story Details page.

**Note:** To edit an issue, click the Details link for the issue. To delete the issue, click Delete.

## Link to Quality Center Test Cases

If CA Clarity Agile is configured to integrate with Quality Center, you can associate a user story to existing Quality Center test cases. The product that is associated with the user story is mapped to a Quality Center project.

For more information about integrating with Quality Center, see the *CA Clarity Agile Integration Guide*.

If you delete a test case from the User Story Detail page, the test case is not deleted in CA Clarity Agile or Quality Center. Only the link between the user story and the test case is removed.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click the Details link of the user story you want to work with.

The User Story Details page appears.

4. Scroll to the Test Cases section and click Link to Test case.

The Test Cases pop-up appears.

5. Select a Quality Center folder to display the test cases in that folder.
6. Select one or more test cases.
7. Save your changes.

The selected test cases are listed in the Test Cases section on the User Story Details page.

8. Review the following fields for the linked test cases:

#### **Owner**

Displays the test case owner as defined in the Quality Center project.

#### **Title**

Displays the test case title as defined in the Quality Center project.

#### **Status**

Displays the latest test case status from Quality Center (passed, failed, or not run).

#### **Additional Comments**

Displays any comments on the test case as defined in the Quality Center project. If the test case fails, the failed steps are displayed here.

**Test Case Pass rate**

Displays the test run results from Quality Center.

9. Click the View link for a test case to review additional details such as test case steps and description.

## CA Software Change Manager Package Information

If the system administrator has enabled integration with CA Software Change Manager (CA SCM), you can see the list of packages that are related to a user story or an issue.

### View CA Software Change Manager Packages

Packages appear in the CA SCM section of the details pages for the user story or issue.

The CA Software Change Manager section displays a list of packages with the following information:

**Package Name**

The name of the package that is associated with a user story or issue. The name has a link to the CA Software Change Manager Package Detail page for the package.

Click the package name to [view more detail](#) (see page 36) about the package.

**SCM Project**

The name of the related project in CA SCM.

**Broker**

The CA Software Change Manager broker.

**Created By**

The user ID that created the package.

### View CA Software Change Manager Package Detail

The CA Software Change Manager Package Details page displays package history and code changes that are associated with a user story or issue. The information on this page is read-only.

You can link to this page from the CA Software Change Manager section in each User Story or Issue Details page.

### The CA SCM Package History table displays the following information:

**Action**

The most recent activity that is performed on the package.

**State**

The current phase in the development lifecycle, such as "Development".

**Modified By**

The name of the user that last modified the module.

**Date Changed**

The date on which the module was last changed.

### The SCM Code Changes table displays the following information:

**Item Name**

The name of the created item that is checked in to a CA Software Change Manager repository.

**Path**

The path of the item in the repository.

**Version number**

The iteration of an item in the repository.

**Date Changed**

The date on which the module was last changed.

**Modified By**

The name of the user that last modified the item.

## Add Comments to a User Story

If you are a product team member, you can add comments to a user story for the team members to view.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details link for the user story you want to work with.
4. In the Comments section, click New Comment.
5. Complete the requested fields.

6. Save your changes.

**Note:** To edit or delete a comment, in the User Story Details page, click Edit or Delete. If you are an administrator or you have created the comment, you can edit or delete it.

You can also add comments to issues from the Issue Details page, using the same steps.

## Assign a Team Member to a User Story

A team member who is assigned to a user story becomes its owner and is responsible for completing the user story. Tasks that are created for that user story are automatically assigned to the same team member. You can also change the owner of the user story.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select the user story and click Details.
4. Select owners of the user story.
5. Save your changes.

## Close a User Story

A user story can be moved to the Completed status when all of its associated tasks are closed. Any team member that is associated with an active team on the product can move a user story to Completed status. Typically, the product owner or scrum master closes the user story after reviewing it and approving that it meets the acceptance criteria.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story you want to close.
4. In the Status field, select Closed.
5. Save your changes.

## Manage User Stories Integrated with CA Clarity PPM

The following information describes how you can manage user stories and tasks that are integrated with CA Clarity PPM:

- To assign user stories to a release, verify if time is logged on tasks for the user stories. If time is logged for the tasks, complete the following actions:
  - Verify that the users that logged time are resources on the CA Clarity PPM project that is associated with the release.
  - If the users are not on the CA Clarity PPM project team, add the users to the project and run the CA Clarity Agile Project Sync job.
- To assign users to user stories and tasks, verify that the users are resources on the linked CA Clarity PPM project team.
- To remove owners from a task, verify that there are no worklogs on the task.

For more information about integrating with CA Clarity PPM and working with projects and tasks, see the CA Clarity Agile *Integration Guide*.

## Delete a User Story

If you are assigned to a product as a team member, you can delete a user story. When a user story is deleted, the following user story details are also deleted:

- Dependencies the user story requires
- Acceptance criteria
- Tasks that are part of the user story
- Comments

Deleting a user story has the following effects on burndown charts:

- Any hours reported for tasks belonging to the deleted user story are deleted.
- The burndown chart guidelines are adjusted to reflect the hours or the deleted points. The adjustment is effective from the day the user story was deleted.
- The actual burndown and burnup lines show any points or hours for the deleted user story and its tasks.

## Clone User Stories with Tasks

You can clone a user story, with its associated tasks, to create a user story.

The following rules apply when you clone a user story:

- If the original user story belongs to an epic, the new user story is created as a child of the same epic. You can change this association after cloning.
- All values are cloned from the original user story except the status and title.
- The status of the new user story is set to Planned by default.
- The title of the new user story displays the title of the original user story that is appended with "Clone".
- If a task is cloned, all values from the original task are cloned except for the status. The status is set to Planned by default.
- Worklogs associated with a task are not cloned.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story you want to work with.
4. Click Clone.

The Select tasks to clone page appears. All tasks are selected by default for cloning.

5. Unselect any tasks that you do not want to clone.
6. Save your changes.

# Chapter 8: Issues

---

You can create issues in CA Clarity Agile and link to them from user stories.

If CA Clarity Agile is configured to integrate with JIRA, then you can create issues in JIRA and can manage them in CA Clarity Agile. The issues synchronize between JIRA and CA Clarity Agile.

For more information about integrating with JIRA, see the *CA Clarity Agile Integration Guide*.

Points that are assigned to issues affect the burndown charts when they have tasks worklogs.

Once a product has been associated with a master release, the master release can be assigned to an issue.

This section contains the following topics:

[Manage Issues](#) (see page 41)

[Create Tasks for Issues](#) (see page 42)

[Add Comments to Issues](#) (see page 43)

## Manage Issues

You can create issues to associate them to releases, sprints, and teams.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New Issue.
4. Complete the requested fields. The following fields require explanation:

#### Points

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

#### Affected Release

Defines the release that this issue affects. The available releases are based on the product that is associated with the issue.

**Fix Release**

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

**Theme**

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

**Master Release**

Defines the master release that is associated with the product. You can assign the issue to a master release only if the product is associated to the master release.

5. Save your changes.

**Note:** To delete an issue, select the issue from the backlog page, and click Delete. To view or edit the details of an issue, click Details. You can edit all attributes of an issue except the product that is associated with the issue. You can delete an issue even if it is synchronized with JIRA. Deleting the issue in CA Clarity Agile also deletes it from JIRA.

## Create Tasks for Issues

You can break down the work into smaller tasks for the team members to perform. This break down makes it easy to complete the work and track the progress.

### Create Issue Tasks from the Backlog Page

You can create tasks from the Backlog if:

- the issue is not assigned to a sprint
- linked to a user story that is assigned to a sprint

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the issue you want to work with.
4. Scroll to the Tasks section and click New Task.
5. Complete the requested fields.
6. Save your changes.

## Create Issue Tasks from the Sprint Backlog & Charts Page

If the issue is assigned to a sprint, you can create a task on the Sprint Backlog & Charts page.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the issue for which you want to create a task.
3. Click New Task.
4. Complete the requested fields.
5. Save your changes.

**Note:** To edit or delete a task, from Sprint Backlog & Charts page, expand the issue, select the task, and click Details or Delete.

## Add Comments to Issues

You can add comments to an issue to give any additional information which would be helpful for the team.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details link for the issue you want to work with.
4. In the Comments section, click New Comment.
5. Complete the requested fields.
6. Save your changes.

**Note:** If you are an administrator or you have created the comment, you can edit or delete the comment from this page.



# Chapter 9: Tasks

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Tasks are items of work that one or more team members perform during a sprint. A user story or an issue is broken down into one or more tasks. When you change the status of a task to Closed, the remaining hours on the task become zero.

Tasks are displayed on the Sprint Backlog & Charts, the User Story Details, and the Virtual Wall.

This section contains the following topics:

[Create Tasks](#) (see page 45)

[Manage Task Worklogs](#) (see page 47)

[Manage Worklogs for Tasks Integrated with CA Clarity PPM](#) (see page 48)

[Impediments](#) (see page 49)

## Create Tasks

As a team member, you can create and manage tasks from the following pages:

- Sprint Backlog & Charts
- Kanban Backlog & Charts
- User Story Details
- Virtual Wall

### Create Tasks from the Sprint Backlog & Charts Page

If the user story or issue is assigned to a sprint, you can create a task on the Sprint Backlog & Charts page.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the user story or issue for which you want to create a task.
3. Click New Task.
4. Complete the required information.
5. Save your changes.

**Note:** To edit or delete a task, from the Sprint Backlog & Charts page, expand the user story, select the task, and click Details or Delete.

### Create Tasks from the Kanban Backlog & Charts Page

If the user story or issue is assigned to a Kanban Board, you can create a task on the Kanban Backlog & Charts page.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Backlog & Charts.
2. Select the user story or issue for which you want to create a task.
3. Click New Task.
4. Complete the required information.
5. Save your changes.

**Note:** To edit or delete a task, from the Kanban Backlog & Charts page, expand the user story, select the task, and click Details or Delete.

### Create Tasks from the User Story Details Page

You can create tasks from the User Story Details page.

**Follow these steps:**

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story for which you want to create a task.
4. Click New Task.
5. Complete the required information. The following fields require explanation:

**Estimated Hours**

Defines the number of hours that are estimated to complete the task and includes hours that are already logged for the task.

**Hours Worked**

Displays the total hours that are logged for the task.

6. Save your changes.

## Create Tasks on the Virtual Wall

You can create new tasks on the Virtual Wall while managing the assigned tasks.

### Follow these steps:

1. Click Agile, and from Sprint Tracking, click Virtual Wall.
2. Select the product, release, and sprint from the drop-down lists.  
The Virtual Wall shows task cards for different user stories for the selected sprint.
3. Click New Task for the user story to which you want to add a task.
4. Complete the required information.
5. Save your changes.

A new task card is added to the user story.

**Note:** To edit or delete a task, from the virtual wall, click the task name on the task card, and edit or click Delete.

## Manage Task Worklogs

Use the Task Worklog section on the Task Details page to log the daily hours that are worked on a task. You can log the hours worked on a task several times in a day. All the logged hours for the user are aggregated and reflected as a single entry for the task for that day. An ID is automatically generated for the entry.

All the worked hours that are logged on the Virtual Wall are also merged into an existing entry (if there is one) on the task worklog. New entries are not created for hours logged multiple times for the same day.

The worklog is available only to product team members and administration users.

Based on the total hours logged daily for task worklogs, the following information is updated:

- Remaining hours left on the task.
- Remaining hours left for the current sprint and applicable date changes on the burndown charts.
- Timesheets in CA Clarity PPM if the CA Clarity Agile release is linked with a CA Clarity PPM project.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Click the task for which you want to create a worklog.  
The Task Details page opens.
3. Click New Task Worklog
4. Complete the following fields:

**Work Date**

Defines the date for which you are creating the task worklog. The available dates are based on the sprint dates of the parent user story. If the user story is not assigned to a sprint, select a date from the last two weeks. Many scrum teams use two- or three-week sprints.

**Hours Worked**

Defines the number of hours that are logged for this task worklog. Remaining hours on the task is recalculated based on the hours worked.

5. Save your changes.

**Note:** To edit a worklog, open the Task Details page, select the worklog, and click Edit.

You can edit a task worklog provided the following conditions are true:

- You are an administrator or the record owner of the worklog.
- If the user story is assigned to a sprint, and the work date is within the release dates.

## Manage Worklogs for Tasks Integrated with CA Clarity PPM

You can manage worklogs for tasks that integrate with CA Clarity PPM. You can perform the following tasks:

- Log time on tasks. Verify that you are a member of the product to which the task belongs.
- Log time on tasks for other users. Verify the following information:
  - You are an administration user.
  - The user for which you are logging time is a resource in the CA Clarity PPM project team.

- Delete your worklog from a task. Complete one of the following actions to delete a worklog:
  - If the associated timesheet in CA Clarity PPM is currently open, delete the worklog in CA Clarity Agile. The Timesheet Sync job automatically updates the CA Clarity PPM timesheet.
  - If the associated timesheet in CA Clarity PPM is already submitted, delete the worklog in CA Clarity Agile and create a timesheet adjustment in CA Clarity PPM.

See the *CA Clarity Basics User Guide* for more information.

- To allow resources to log time on integrated tasks in CA Clarity Agile, add the resources as team members on the CA Clarity PPM project.

**Note:** If you log time in CA Clarity Agile, wait for the Timesheet Sync job to run before submitting the timesheet in CA Clarity PPM. The job updates the timesheet with the latest logged hours and tasks from CA Clarity Agile. To schedule this job to run more often at the end of week, contact your CA Clarity PPM administrator.

## Orphaned Worklogs

If you delete a resource from a project in CA Clarity PPM before worklogs are posted for that resource, the worklogs become orphaned. The resource does not exist against which the corresponding worklogs can be posted.

In this situation, the project manager is notified through automated email to take one of the following actions:

- Delete the worklog in CA Clarity Agile.
- Add the resource back to the CA Clarity PPM project team so that the time can be logged.

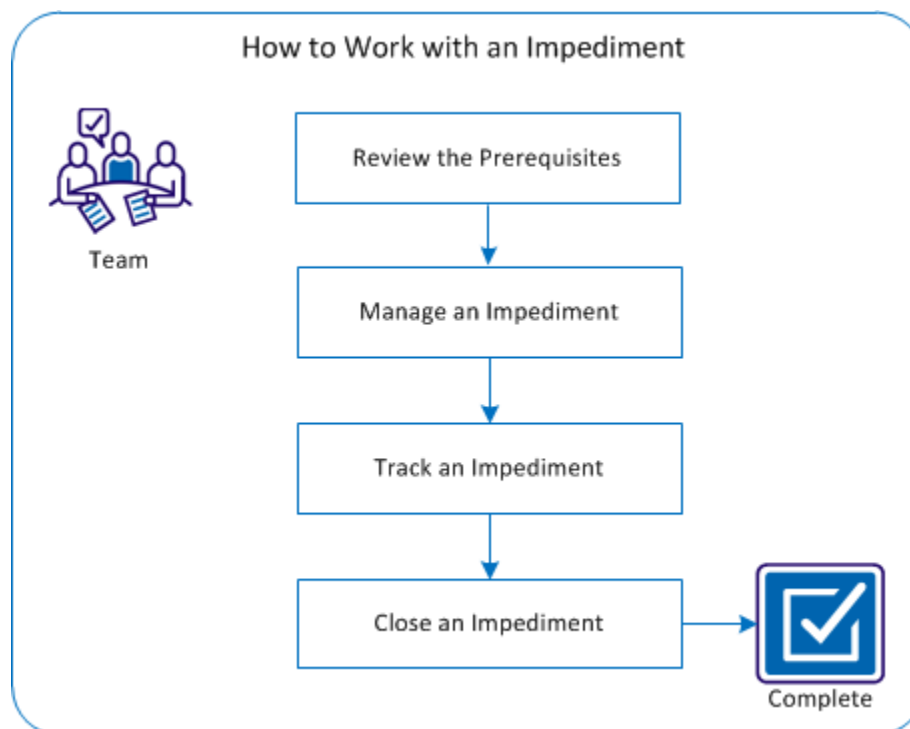
## Impediments

An impediment is an interference or problem that impacts the successful completion of task. An impediment can include any kind of problem that hampers or slows down the progress of work. For example, a hardware or software malfunction is an impediment that can delay the progress in work for a software development team.

## How to Work with an Impediment

As a team member, you can create an impediment to specify how a problem is impacting the task, and how severe the impact is.

The following diagram describes how a team member works with an impediment.



To work with an impediment, perform these steps:

1. [Review the prerequisites](#) (see page 50).
2. [Manage an impediment](#) (see page 51).
3. [Track an impediment](#) (see page 52).
4. [Close an impediment](#) (see page 52).

### Review the Prerequisites

Before you work with an impediment, verify that the following items are set up in the product:

- User stories and tasks are created.
- Team is assigned.

## Manage an Impediment

You can add, modify, or delete an impediment to a task. Add an impediment to the task that you are working on and update the status when the problem is resolved.

For example, the QA Engineer to test a new feature is on leave, so testing cannot be done on schedule. This impediment could affect the project timelines unless a new resource is found to do the required testing. If a new resource is found, the status of the impediment is updated.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Click Details for the user story that has an impeded task.
3. Click the Details link for the task.
4. Scroll to the Impediment section, and click New Impediment.

The New Impediment pop-up dialog opens.

5. Complete the required fields.
6. Save your changes.

The message area at the top of the page displays a warning that the task is impeded.

**Note:** To edit or delete an impediment, open the Task Details page, select the impediment, and click Edit or Delete.

When you create an impediment, the following visual cues appear for the task:

- A message flag appears on the Task Details page.
- An icon appears in the task list on the User Story Details page.
- If you are using Sprint, an icon appears on the Virtual Wall task card, and in the task list on the Sprint Backlog & Charts.
- If you are using Kanban, an icon appears on the kanban board story card, and in the task list on the Kanban Backlog & Charts.

## Track Impediment

You can track the status of an impediment from the Sprint Backlog & Charts page to understand the progress. For example, to test a new feature, a new resource is assigned in place of the QA Engineer who is unavailable. The information is updated for the impediment. The team members can track this information from the Sprint Backlog & Charts page.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Expand the user story that has an impeded task.
3. Click the Details link for the task.
4. Navigate to the Impediments section and check the status of the impediment.

**Note:** If you are using Kanban, click Agile, and from Kanban Tracking, click Kanban Backlog & Charts page to track the status.

You can also track the status of an impediment using the following features:

- Select Follow for the impediment, and use the Chatter Feed view to track the update.
- View the Impediments by Release report.
- View the status of impediment from the Task Details page.

## Close an Impediment

You can close an impediment if the impeding issue is resolved and it is no longer a challenge to complete the task. For example, the team member can close the impediment, since a new resource is assigned to do the required testing.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Hover over the Impediment icon, and click the Task Details link from the tooltip.  
The Task Details page appears.
3. Navigate to the Impediments section, and select Closed in the Status field for the impediment.
4. Save your changes.

**Note:** If you are using Kanban, click Agile, and from Kanban Tracking, click Kanban Backlog & Charts page to close the impediment.

The following changes are visible for the task:

- The impediment is deleted and disappears from the Impediments list on the Task Details page.
- The message flag closes on the Task Details page.
- The icon disappears from the task list on the User Story Details page.
- The icon disappears from the Virtual Wall task card.
- The icon disappears from the task list on the Sprint Backlog & Charts page.
- The icon disappears from the kanban board story card.
- The icon disappears from the task list on the Kanban Backlog & Charts page.

You have successfully used an impediment to communicate a problem impacting the completion of a task.



# Chapter 10: Teams

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You can create teams to work on different projects. A product owner, development team, and scrum master typically form the team.

This section contains the following topics:

[Manage a Team](#) (see page 55)

[Manage Team Members](#) (see page 56)

[Assign a Team to a Sprint](#) (see page 57)

[Remove a Scrum Team Member](#) (see page 58)

## Manage a Team

You can create teams to work on different projects. A team can be assigned to one or more sprints or kanban board. One or more teams can be assigned to one product.

### Follow these steps:

1. Click Agile, and from Resources, click Teams.
2. Click New Team.

The New Team page appears.

3. Complete the required fields. The following fields require explanation:

#### Active

Specifies whether the team is active. You cannot filter based on inactive teams.

#### 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 Backlog & Charts 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 (1,2,3,5,8,13,21).

#### Team Domain

Specifies the Domain name or URL for the team.

4. Save your changes.

**Note:** To edit or delete a team, select the team from the Teams page, and click Details or Delete.

After you create a team, it is automatically added to any new sprints created for the product to which the team is assigned. You can remove the team from the default team assignments.

## Delete a Team

A CA Clarity Agile user who has super user privileges can delete a team. When a team is deleted, the following changes take place:

- Team members are removed from the team
- Any open user stories that are assigned to members of the team become unassigned
- The team is no longer available to assign to items in the product
- The team cannot be selected in the filter for velocity and burndown charts
- Any team member whose only assignment was on the deleted team can no longer participate on the product (the product becomes view only)

You can view in charts the work the team members perform before deleting the team by selecting All Teams. You can still view detail pages for completed user stories and tasks.

## Manage Team Members

A team member is an active CA Clarity Agile user who participates in the project. Add users to the team so that they can participate on the product.

**Important!** To participate on a product, a user must be a member of at least one team that is assigned to the product. As a participant, you can create and edit user stories and tasks.

**Follow these steps:**

1. Click Agile, and from Resources, click Teams.
2. Click Details for the team to which you want to add a member.  
The Team Details page opens.
3. Scroll to the Team Members section, and click New Team Member.

4. Complete the required fields. The following fields require explanation:

**Allocation (%)**

Specifies the percentage of time the member is allocated to this team or product. Specify a value so that the team member is considered in the team allocation charts.

**Default:** 100 percent

5. Repeat steps 3 and 4 to add more users to the team.
6. Save your changes.

**Note:** To edit or delete a team member, from the Team Details page, select the team member, and click Edit or Delete.

## Assign a Team to a Sprint

You can assign a team to a sprint so that they can participate in projects.

**Note:** This procedure assigns an existing scrum team and does not create one.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Sprint Information.
2. Filter the view to display the sprint you want to assign the team to.
3. In the Sprint Teams section, click Add Sprint Team.

The Add Sprint Team page appears.

4. Complete the required fields. The following fields require explanation:

**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.

Expected velocity does not alter general team numbers. You can accept the value that is specified on the Team Details page or can override it for the sprint by entering a new value. The new value becomes the default velocity for the team for each new sprint that the team is assigned to.

### Hours per Day

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

This value does not alter general team numbers. You can accept the Hours per Day specified in the Team Details page or can override it for the sprint by entering a new value.

5. Save your changes.

## Remove a Scrum Team Member

A CA Clarity Agile user can remove a scrum team member, who is a member of the same product. After a team member is removed, the following changes happen:

- The team member does not display in any lists the scrum team filters and the member was removed from.
- For any burndown charts based on the owner, the guidelines and actual burndown calculations are adjusted to reflect the removal of the team member. Team burndown calculations are unaffected.
- Any user stories or tasks that were assigned to the team member become unassigned. The user stories and tasks that are already closed are not affected.
- The team member cannot edit or manage user stories and tasks that are assigned to the scrum team from which they were removed.

# Chapter 11: Sprints

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Sprint page displays the user stories that are committed to for a sprint. Expand each user story to display the tasks necessary to complete them. By default, the sprint backlog lists user stories by their story points (highest to lowest).

The daily standup meeting during sprint serves to keep the team up-to-date with each members work and any issues that could impact the completion of tasks. User stories and tasks can be reevaluated and re-scoped.

This section contains the following topics:

[How to Plan and Track a Sprint](#) (see page 60)

[Change Team Sprint Velocity](#) (see page 65)

[Track Daily Progress on Sprint Tasks](#) (see page 65)

[Sprint Information](#) (see page 66)

[Sprint Backlog & Charts](#) (see page 66)

[Virtual Wall](#) (see page 67)

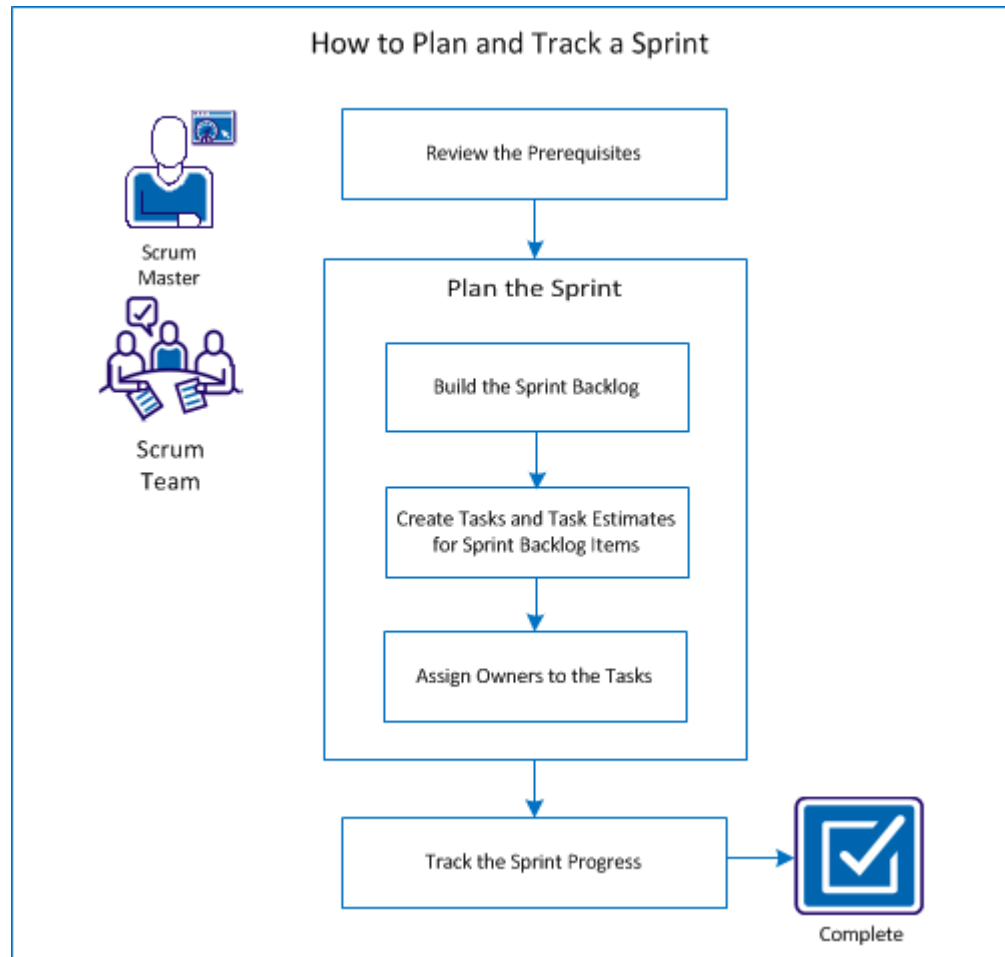
[Sprint Activity through Chatter Feeds](#) (see page 68)

[Track Progress with Charts and Reports](#) (see page 68)

## How to Plan and Track a Sprint

Sprints are a series of iterations in the product development lifecycle in which the items planned during release planning are delivered. Sprints are time bound iterations that are typically spread over two to four weeks. The scrum master collaborates with the scrum team to plan a sprint.

The following diagram describes how the scrum master and scrum team plan and track a sprint.



Perform these steps to plan and track a sprint:

1. [Review the prerequisites](#) (see page 61)
2. [Plan the sprint](#) (see page 61)
  - [Build the sprint backlog](#) (see page 62)
  - [Create tasks and task estimates for sprint backlog items](#) (see page 63)
  - [Assign owners to the tasks](#) (see page 63)
3. [Track the sprint progress](#) (see page 64)

## Review the Prerequisites

Before you plan a sprint, verify that the following items are set up in the product.

- Release Backlog is populated with user stories and issues.
- Points are specified for the backlog items to calculate the sprint capacity.
- Sprint is added.
- Scrum Team is added.

## Plan the Sprint

At the beginning of each sprint, the scrum master and the scrum team meet to determine the scope of the planned work for the sprint. During the meeting, you identify the user stories that can be covered in the sprint. For example, your team determines that they can complete 60 points in the sprint. Select the user stories and issues, which are based on priority and capacity points that the team can commit to completing.

Perform the following tasks during sprint planning:

- [Build the sprint backlog](#) (see page 62).
- [Create tasks and task estimates for sprint backlog items](#) (see page 63).
- [Assign owners to the tasks](#) (see page 63).

## Build the Sprint Backlog

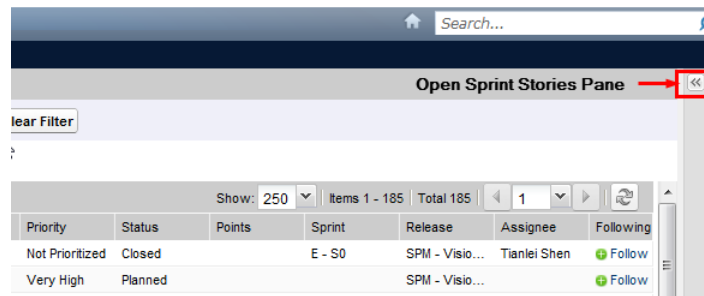
The sprint backlog includes the backlog items that the scrum team plan to work on during the sprint. During the sprint plans, you move the user stories and issues from the release backlog to the sprint backlog. For example, in the Parking Pass Management System product, the following user stories have been identified for the release:

- As a commuter, I want to purchase a parking pass online.
- As a commuter, I want to pay for a parking pass by credit card.
- As a commuter, I want to pay for a parking pass by PayPal™.

You can select the user stories that you want to complete in the current sprint, and move them to the sprint backlog.

### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Open Sprint Stories Pane to display the sprint stories backlog.



The pane displays the backlog items for the current sprint.

4. (Optional) Use one of the following methods to filter the view by sprint:
  - Select an existing filter.
  - Create a filter.
5. Drag-and-drop a user story or issue from the release backlog onto the sprint backlog.
6. Repeat Step 5 to add additional user stories and issues to the sprint backlog.

**Note:** Filter the sprint backlog by team to display the velocity chart. The velocity chart shows the planned capacity against actual capacity. The chart helps the scrum team plan the number of user stories that they commit to during the sprint.

## Create Tasks and Task Estimates for Sprint Backlog Items

Create tasks to break down the work for user stories and issues to which the scrum team commits. You can also enter the estimated hours that are required to complete the task. For example, for the user story "As a commuter, I want to pay for a parking pass by credit card", you can break down the work into two tasks:

- Create the interface.
- Test the interface

You estimate two hours to create the interface and one hour to test the interface.

The scrum team can also log the numbers of hours they worked for a user story at the task level.

### Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the product name from the Product drop-down list.
3. Filter the view by sprint to display the sprint backlog for which you want to create tasks.

**Note:** By default, the current sprint appears.

4. Click the user story or issue title link.

The User Story or Issue Details page opens.

5. Scroll to the Task section and click New Task.
6. Complete the required fields. The following fields require explanation:

#### Estimated Hours

Approximate hours to complete the task.

7. Save your changes.

## Assign Owners to the Tasks

Assign an owner to each task to identify who takes the responsibility for completing the effort. You can assign more than one owner to a task.

For example, you can assign two developers as owners for the task to create an interface for purchasing a parking pass online. While one developer writes the code for the feature, the other developer reviews the code.

### Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the product name from the Product drop-down list.

3. Filter the view by sprint to display the user stories to which you want to assign owners.
4. Click Details next to the backlog item.
5. Select the owners by either typing the name in the Owners field, or by selecting a name from the pull-down list.
6. Save your changes.

## Track the Sprint Progress

You can use the Sprint Backlog & Charts to track the progress of the sprint and identify any risk. The Sprint Backlog & Charts page displays hours burndown or points burndown to provide a comprehensive report.

### Follow these steps:

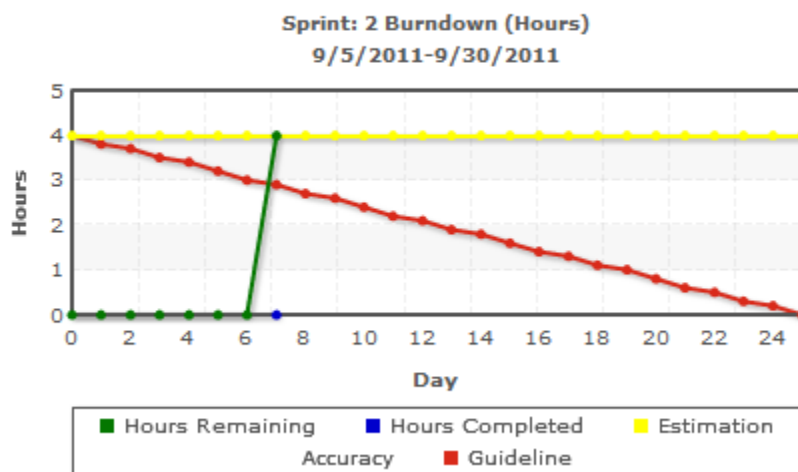
1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the Product, Release, and Sprint from the drop-down list.

The Burndown and Allocation Chart appears for the selected sprint.

### Hours Burndown

An hours burndown chart compares the actual hours that the team burned on user stories against the expected burndown for the sprint.

### Burndown and Allocation Charts



### Points Burndown

A points burndown chart compares the remaining story points that the team completed against the expected burndown.

You have successfully planned and tracked a sprint.

At the end of a sprint, update the status of the backlog items to closed or move the incomplete items to the next sprint. The scrum master conducts a retrospective meeting with the team to discuss and identify the steps to improve the process.

## Change Team Sprint Velocity

The estimated velocity of a team can change from one sprint to the next. When planning the workload for a sprint, you can update the velocity of the team on the Sprint Information page. The changes are immediately reflected in the sprint backlog section of the Backlog page.

### Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Information.
2. Filter the view by product and the sprint in which you want the change to occur.
3. Scroll down to the Sprint Teams section.
4. Edit inline the velocity details.
5. Save your changes.

## 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 tasks:

- Viewing and updating comments and notes on the Sprint Details and User Story Details pages.
- Viewing sprint progress charts and reports on the Dashboard page and in Sprint Backlog & Charts.
- Discussing task status in daily stand-ups.
- Leveraging the Virtual Wall to update task progress.

## Sprint Information

The Sprint Details page displays all information relating to a sprint. The information includes general information, goals and risks, sprint metrics, retrospective comments, user stories and teams that are assigned to it. You can filter the view by product, sprint, and team. The filtered view becomes your default view on subsequent visits to the page.

**Follow these steps:**

- Click Agile, and from Sprint Tracking, click Sprint Information.

## Sprint Backlog & Charts

The Sprint Backlogs & Charts page provides a comprehensive view for managing a sprint. The chart includes the sprint summary, detailed information for the sprint, the related user stories, and issues.

**Note:** The summary values reflect the number of points and hours for user stories that are displayed on the current page. To see the total for the entire sprint, verify that the value of the Show field is higher than the number of user stories in the sprint (Maximum: 250).

Expand user stories and issues to see their associated tasks. Clicking a task title displays its task details.

In addition to user stories and tasks, you can view the following charts:

- Sprint burndown and burnup
- Points burndown and burnup
- Team member allocation

From Sprint Backlogs & Charts, you can perform the following tasks:

- [View charts](#) (see page 70)
- [Manage user stories](#) (see page 31)
- [Create tasks for user stories or issues](#) (see page 45)
- [Manage user stories integrated to CA Clarity PPM](#) (see page 39)

## Virtual Wall

When planning and managing a sprint, team members generally manipulate cards representing user stories and tasks. The cards are tacked to a wall or large board and manually moved around to update status and details. The Virtual Wall enables you to manage your tasks graphically. Team members can view all user stories and tasks that are committed for the sprint. You can also view the user stories and tasks that are specific to the team and task owners.

User stories are shown in the ascending order of ranking and include task details and any impediments. The location of the card from left to right on the page shows the task status to the viewer. The default can be one of the following options:

- Planned
- In Progress
- Closed

**Note:** System Administrator can customize the task status from the Setup page.

The default card color is green, but each team can color-code their task cards by mapping them on the Team Detail page. Tasks that have impediments display the impediment icon with details in the tooltip.

## Manage Tasks on the Virtual Wall

As a product owner or a product team member, you can create tasks on the Virtual Wall. If you are not a product team member, you can only view the Virtual Wall.

**Follow these steps:**

1. Click Agile, and from Sprint Tracking, click Virtual Wall.
2. Click New Task for the user story to which you want to add a task.
3. Enter the requested details.
4. Save your changes.

A new task card is created on the virtual wall.

**Note:** To edit, delete, or create new impediment on the virtual wall, click the arrow on the task card, and click Edit, Delete, or New Impediment.

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 that are completed on it to reflect the burndown accurately. However, when you drag a task to a Closed status, any remaining hours on the task are zeroed out automatically.

## Set Virtual Wall Colors

When tasks display on the Virtual Wall, they are green. You can color-code the task cards on the Virtual Wall to display in different colors for each task status, or task type. You can map colors for only one set of criteria. Color mapping is team-specific and is set on the Team Edit page.

**Follow these steps:**

1. Click Agile, and from Resources, click Teams.
2. Click Edit for the team you want to work on.

The Team Edit page appears.

3. In the Virtual Wall Colors section, select a color criterion: Status or Type.

The values and current color sample for your selection appear. For example, for Status, a color sample appears for each task status (Planned, In Progress, Closed).

4. Choose new colors for your values.
5. Save your changes.

**Note:** To see your new color settings on the Virtual Wall, be sure to set the Team filter to display the team you set the colors for.

## Sprint Activity through Chatter Feeds

You can see sprint updates from Chatter on the Chatter Feed page. For example, you can see details like who created the sprint and on what date and time. You can also comment on the update or attach a file or link to the update.

## Track Progress with Charts and Reports

CA Clarity Agile provides multiple methods for tracking progress of a sprint, through charts and reports.

- [View Charts on the Dashboard Page](#) (see page 69)
- [View Charts on the Sprint Backlog & Charts Page](#) (see page 70)
- [View Reports and Charts on the Salesforce.com CA Clarity Agile Dashboard](#) (see page 71)
- [View Reports from the Reports and Dashboards Tab](#) (see page 73)

## Display Charts on the Dashboard Page

Team members and other users can check charts to view the status of products.

### Follow these steps:

1. Click Agile, and from Overview, click Dashboard.
2. Click the filter icon in the right-hand corner of a chart window.

The Chart Options filter appears.

3. Complete the requested fields.
4. Click Apply.

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

## View Charts on the Dashboard Page

The Dashboard page contains four configurable charts. Each chart can be filtered individually to create a specific chart for a product, enabling users to create a customized view. 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

Users can select the following chart types:

### Hours Burndown

An hours burndown chart that compares actual hours the teams burned on user stories against the expected burndown for the sprint. The chart also contains a burnup line for the number of hours completed.

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. The burnup line displays in blue and the number of hours that are originally estimated to complete the task displays in yellow. 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 that compares the remaining story points the teams 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 tooltip on the actual burndown line displays the sprint day and the number of points remaining in the sprint.

### Velocity

A velocity chart showing the teams story point capacity for the sprint, and the number of points planned. The x axis represents all the sprints in the release. The y axis represents the user story points that are delivered for each sprint. Vertical bars represent the team velocity for the sprint. The average velocity of current and previous closed sprints appears as a turquoise line running horizontally across the velocity bars.

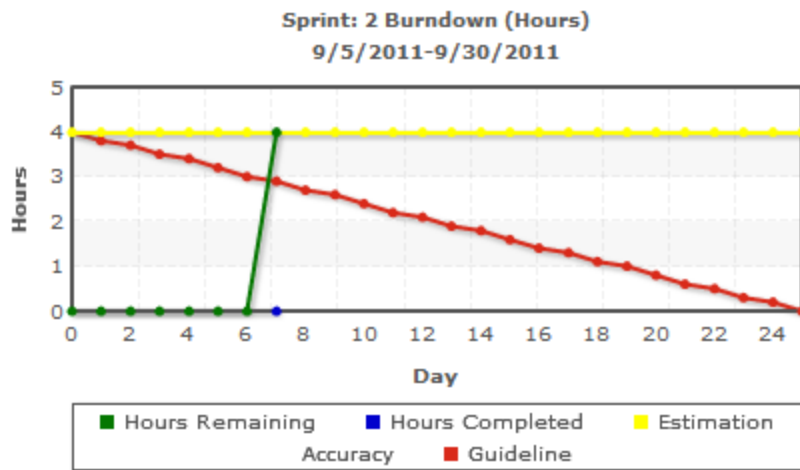
### View Charts on the Sprint Detail Page

The Sprint Backlog & Charts 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 that the team burned on user stories against the expected burndown for the sprint.

#### Burndown and Allocation Charts



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. Hours completed is shown in blue. The Estimated hours is shown in yellow. 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 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 tooltip 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 through 100 percent 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).

## **CA Clarity Agile Dashboard Reports and Charts**

You can view additional charts and reports that assist you in managing a sprint from the CA Clarity Agile Dashboard on Salesforce.com.

### **Follow these steps:**

1. Log in to CA Clarity Agile and click Setup in the navigation toolbar.
2. Click the Dashboards tab.

The dashboard appears. If the CA Clarity Agile dashboard is not visible, click Go to Dashboard List, under the dashboard title. The CA Clarity Public Dashboard appears.

3. Click Agile Dashboard.

The dashboard appears with the following charts:

- Issues Chart - All Bugs by Status
  - Issues Chart - Open Bugs by Severity
  - User Story Completion Chart - All Bugs by Status
4. Click the chart to view options for generating a report. Report Options vary for each report.

You can modify the criteria for the report with the following options:

**Summarize information by:**

- Count
- Points
- Product: Product Name
- Release: Release Name
- Severity
- Sprint: Sprint Name
- Sprint: Active
- Status
- Type

**Show**

- My user stories
- My teams user stories
- User owned stories
- Queue owned user stories
- All user stories

**Time Frame**

You can select time frames using the Date Field and Range.

**Filters**

You can filter the chart at the bottom of the page, under Filtered By.

- Click Edit to modify the filters for the current chart.
- Click Clear Filter next to the filter query statements to remove a filter.

Click [Help for this Page?](#) to learn more about running and modifying reports.

## View Reports from the Salesforce.com Reports and Dashboards Tab

You can review reports for tracking various aspects of your products and releases.

**Follow these steps:**

1. From any CA Clarity Agile or CA Clarity Requirements page, click the Reports link.

The Reports & Dashboards tab appears.

2. Click the name link of the report to open it.

The report opens and you can set the criteria. For more information about creating reports, see the Salesforce.com page help.



# Chapter 12: Kanban

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Kanban means a visual card or signboard. Kanban is an Agile Methodology which emphasizes visualizing all the steps in the workflow. The progress of a project is tracked on a board that is known as the Kanban Board. The Kanban Board has status lanes which correspond to the different stages in the lifecycle of a project. As the project progresses, the work items of the project move from one lane to another.

Advantages of implementing Kanban include:

- Improved quality of work.
- Faster turnaround of work.
- Identification and elimination of bottlenecks.
- Reduction of time, a task spends in queues.
- Improved teamwork.
- Reduction in wasted effort.

The basic principles of Kanban are:

- Visualize the workflow by allowing everyone to view the work in progress.
- Reduce the number of work in progress items.

This section contains the following topics:

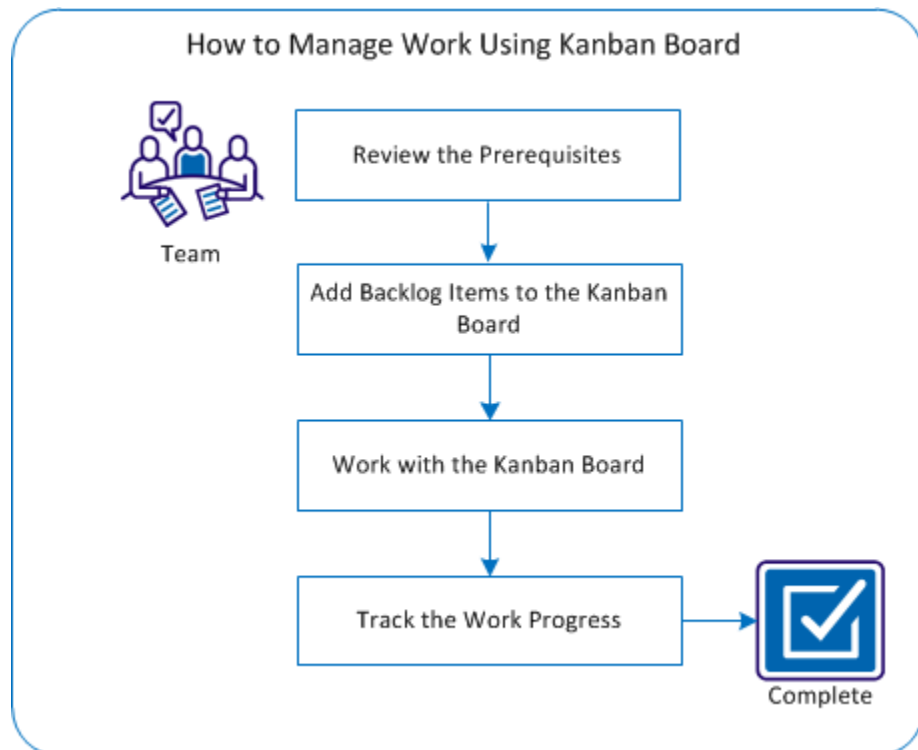
[How to Manage Work Using Kanban Board](#) (see page 76)

## How to Manage Work Using Kanban Board

As a team member, you can manage and track the product backlog work using the Kanban Board. You can add user stories and issues to the product backlog using the Kanban Board and track its progress.

For example, the team at Forward, Inc. is planning for the next release of their online trading software. The product manager has identified the new features and enhancements for the upcoming release, and plans to implement Kanban to deliver the project.

The following diagram describes how the team members can manage and track the product backlog work using the Kanban Board.



To manage and track a release using Kanban Board, perform the following steps:

1. [Review the prerequisites](#) (see page 77).
2. [Add backlog items to the Kanban Board](#) (see page 78).
  - a. [Add backlog items from the product backlog list](#) (see page 78).
  - b. [Add backlog items from the backlog queue on the Kanban Board](#) (see page 79).
  - c. [Add backlog items directly to the Kanban Board](#) (see page 80).
3. [Work with the Kanban Board](#) (see page 80).
  - a. [Manage user story and issue tasks](#) (see page 81).
  - b. [Mark user story or issue as Ready to Pull](#) (see page 82).
  - c. [Move Ready to Pull story cards](#) (see page 83).
4. [Track the work progress](#) (see page 84).

## Review the Prerequisites

Before you use the Kanban Board to manage the product backlog, verify that the following items are set up in CA Clarity Agile and CA Clarity Requirements.

- The product backlog is created.
- The release is created and release planning is done.
- The user stories and issues for the release are prioritized.
- The Kanban Board is created for the release.
- The Kanban Board is configured with the status lanes. The status lanes represent the stages in the project lifecycle.
- Each lane on Kanban Board is configured with the work in process (WIP) limit. The WIP limit is the maximum number of user stories that you can work on at any time.

For example, Michael creates a Kanban Board. He identifies the backlog of user stories for the release and prioritizes them in the order of business importance. The following status lanes and WIP limits is configured on the Kanban Board.

Status Lane	Description	WIP Limit
Planned	User stories ready for development.	5
Development	User stories under development.	3

Status Lane	Description	WIP Limit
Test	Developed user stories under testing.	2
Completed	User stories ready to close.	5

## Add Backlog items to the Kanban Board

The product backlog contains user stories and issues. You can add the backlog items planned for the release to the Kanban Board. The linked backlog items appear on the Kanban Board as story cards. As the tasks associated with the backlog items complete, the story cards are moved from one status lane to other.

To add backlog items to the Kanban Board, follow one of these methods:

- [Add backlog items from the product backlog list](#) (see page 78).
- [Add backlog items from the product backlog queue on the Kanban Board](#) (see page 79).
- [Add backlog items directly to the Kanban Board](#) (see page 80).

### Add Backlog Items from the Product Backlog List

Michael can select the backlog items prioritized for the release from the product backlog list and add them to the Kanban Board. The team can work on the backlog items added to the Kanban Board.

- As a General Manager, I want to see all activities on the quotes that are open for my product lines.
- As a manager, I want to see reports that indicate trade volumes.
- As a client, I want to be able to use the site for personal trades.

#### Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Filter the backlog items for the release.
4. To add a backlog item to the Kanban Board, follow one of these steps:
  - a. Select the user story or issue from the list and use inline editing to select the Kanban Board.
  - b. Click Details for the user story or the issue, and update the Kanban Board name.
5. Save your changes.

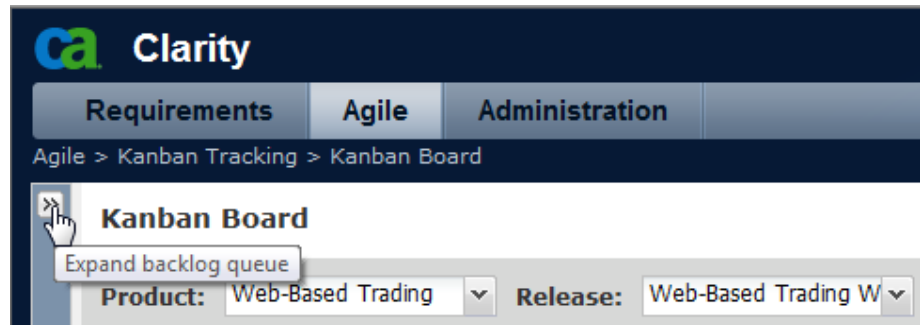
## Add Backlog Items from the Product Backlog Queue on the Kanban Board

Michael can select the backlog items from the Product Backlog Queue and add them to the Kanban Board so that the team can work on them. He decides to add another two user stories to the Kanban Board:

- As an executive, I need consistent reporting across the system.
- As a director, I need an org chart that is updated quarterly.

### Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click Expand backlog queue.



User stories identified for the release, but not assigned to any sprint or Kanban Board appears as story cards.

4. Drag the story cards to the Kanban Board so that the team can start working on them.

**Note:** If the number of user stories in the lane exceeds the WIP limit, the header of the lane is highlighted.

## Add Backlog Items Directly to the Kanban Board

When you add a backlog item directly to the Kanban Board, it is associated, by default, with the first kanban lane on the board. You can change the default values, and you can attach the backlog item to another Kanban Board or kanban lane. If the number of story cards in the lane exceeds the WIP limit, the lane header is highlighted and you can drag it to the backlog queue.

For example, Michael discussed with the customers the enhancements and new features that are planned for the new release. One of the customers suggested a feature, which Michael feels would be a significant value-add to the product. Michael decides to add the feature in the current release and adds the following user story to the Kanban Board.

- As a Client, I need online library integration.

### Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.  
The Kanban Board displays the story cards.
3. Click New User Story or New Issue.
4. Complete the required fields.
5. Save your changes.

**Note:** To edit or delete a user story or issue from the Kanban Board, click the title or the arrow in the story card.

## Work with the Kanban Board

The backlog items are represented with story cards. The team members pull the story cards with higher priority from the backlog to the Kanban Board. When the tasks assigned to the backlog item are completed, the story card is marked as Ready to Pull. The story cards are then pulled to the next lane by the team members.

For example, Michael moves five user stories with the highest priority to the Planned lane. The project goes through the following phases on the Kanban Board:

- The developers pull three story cards in the prioritized order from the Planned lane to the Development lane.
- As the Planned lane now has only two story cards, Robert moves three more story cards from the backlog to the Planned lane. The number of story cards in the lane is maintained at the WIP limit.
- Once the developers have completed their tasks, they mark the story cards as Ready to Pull.
- The QA engineers pull these story cards to the Test lane and start working on them.
- Once the testing is completed, they mark it as Ready to Pull.
- The project manager can move the Ready to Pull story cards from the Test lane to the Completed lane.

Every time developers or QA engineers needs user stories to work on, they move Ready to Pull story cards from the previous lane. The cycle continues until you complete all the user stories in the backlog.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Complete any of the following tasks:
  - a. Pull a backlog item from the Backlog Queue to the Kanban Board.
  - b. If you have completed the tasks on the backlog item, mark it as Ready to Pull.
  - c. If you are waiting for a backlog item to work on, move a user story or issue marked Ready to Pull from the previous lane.

## Manage User Story and Issue Tasks

You can add and update the tasks associated with the user stories and issues planned for the release. As you update the tasks with the daily work logs, the indicator on the story card displays the following information:

- The percentage of work completed.
- Number of hours of work done on the user story.
- The remaining hours planned for the work.

If there are any impediments to the tasks that you are working on, the story cards display an icon.

For example, for the user story “As a General Manager, I want to see all activities on the quotes that are open for my product lines”, the team members adds the following tasks:

- Test positive and negative condition combinations.
- General Manager can see and select from only those product lines they are assigned to.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click the title on the story card.

The details page appears.

4. Click New Task in the Tasks section.
5. Complete the required information.
6. Save your changes.

**Note:** To update the tasks, click the arrow on the story card and click Edit Task. You can also update the task work logs with the number of hours worked.

### Mark User Story or Issue as Ready to Pull

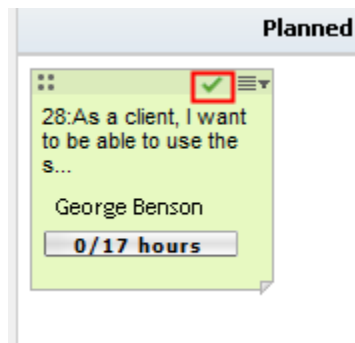
You can mark the story card as Ready to Pull when the tasks associated with its user story or issue are completed. The story cards which are Ready to Pull are indicated with a checkmark on the story card.

For example, the team members complete the tasks associated with the user story “As a General Manager, I want to see all activities on the quotes that are open for my product lines”. The story card for the user story is marked as Ready to Pull.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click the arrow on the story card, and click Mark as Ready to Pull.

The story card is marked with a checkmark indicating you can pull the card to the next lane.



### Move Ready to Pull Story Cards

Team members can move story cards marked as Ready to Pull to the next lane to continue with the project.

For example, the QA engineers pull the user stories to the Test lane and start working on them. Once the testing is completed, they mark it as Ready to Pull so that it can be pulled to the next lane.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Drag-and-drop the Ready to Pull story cards to the next lane.

**Note:** The Ready to Pull checkmark disappears when you move the story card to the next lane.

## Track the Work Progress

You can track the progress of the project and can identify roadblocks through the Kanban Board and Kanban Backlog & Charts. The Kanban Backlog & Charts page provides the following information:

- List of backlog items and related tasks for the release. You can use inline editing and modify the details.
- Hours worked on each task.
- Average cycle time to complete a backlog item. Average cycle time is the time taken to close a user story or issue since the team started working on it.
- Number of days each backlog item has spent in the lane, which helps identify any blockers.
- Backlog items which are ready to be pulled to next lane.

**Note:** You can click Configure and select the columns to appear on the page.

You can also track and forecast the project using the following charts:

- [Cycle Time chart](#) (see page 84)
- [Cumulative Flow chart](#) (see page 85)

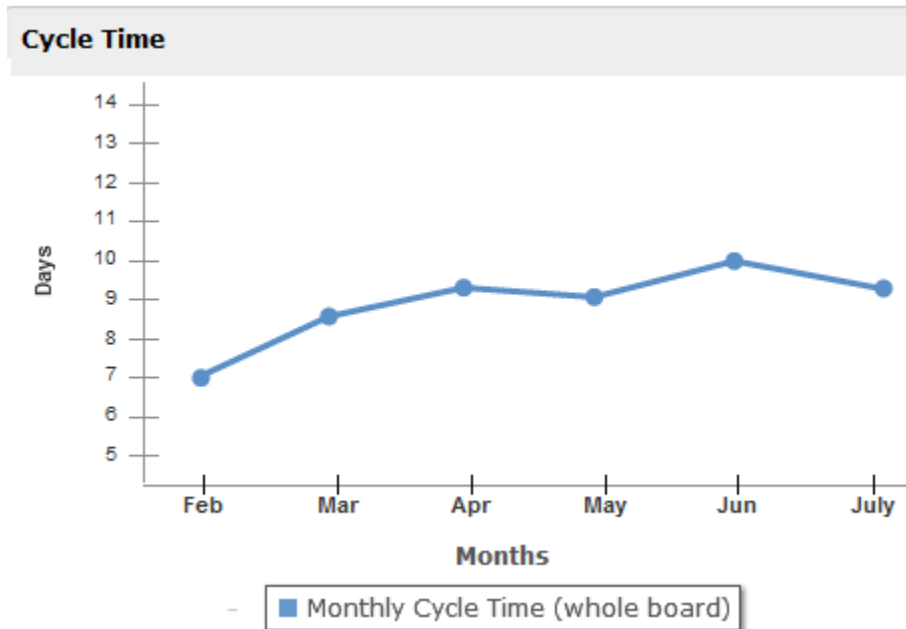
For example, Michael can analyze the Cycle Time and Cumulative Flow chart to understand the average time it takes to complete a user story, the remaining work, and forecast when all of the user stories will be completed.

## Cycle Time Chart

Cycle Time starts when the actual work begins and it ends when the task is finished. Cycle Time is a key metric that helps to make realistic commitments, and provides insight into whether improvements are yielding expected results.

Every time cards are pulled off the board, Cycle Times for each task is measured and chart is generated. Cycle Time chart presents the average time it takes for a task to process between the specified start and end lanes. You can define the time period for which the tasks are included in the chart. The chart is used to analyze the time required to traverse work items and make improvements in the project performance.

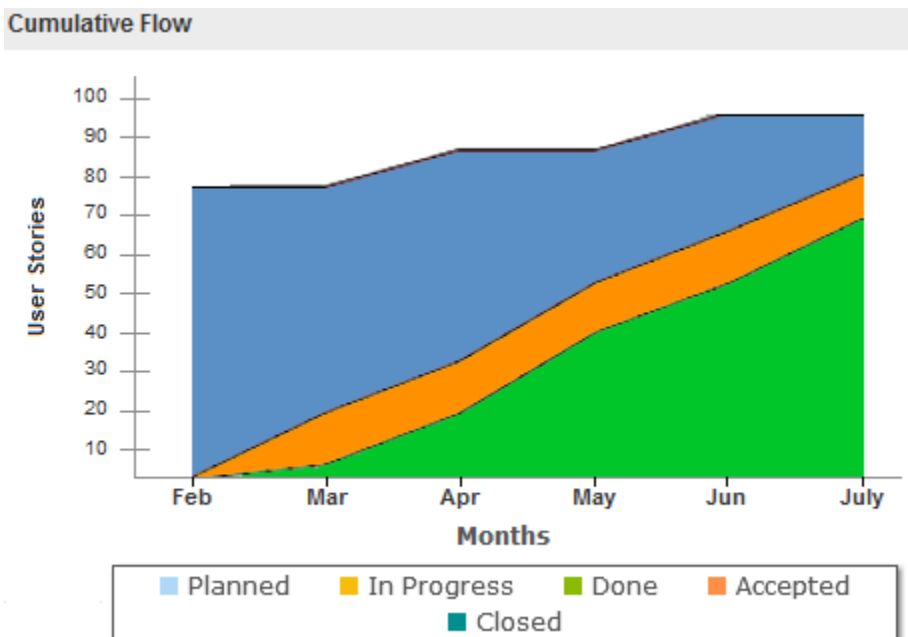
The following figure displays the Cycle Time generated for the period between February and July.



### Cumulative Flow Chart

Cumulative Flow chart presents the relative amount of work for each stage of project over time. Colored areas on the diagram represent work in progress for each stage of a process.

The following figure displays the Cumulative Flow chart generated for the period between February and July.



The vertical axis of the chart displays how many items are currently in progress. The horizontal axis displays the duration it takes for a task to complete. Measuring the horizontal axis on a Cumulative Flow chart allows you to monitor the Cycle Time and forecast when all the work in progress will complete. Vertical axis helps you to set the right WIP limits.

**Follow these steps:**

1. Click Agile, and from Kanban Tracking, click Kanban Backlog & Charts.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Select the Start date, End date, Time Scale, Start Lane, and End Lane.
4. View the Cycle Time and the Cumulative Flow charts.

You have successfully used Kanban Board to manage and track the product backlog work.

# Chapter 13: Chatter

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This section contains the following topics:

[Chatter](#) (see page 87)

[Turn Following On or Off](#) (see page 87)

[How to View Different Types of Chatter Information](#) (see page 88)

## Chatter

Chatter lets you communicate with others in your organization and exchange information in real time. Using Chatter, you can do the following:

- View your information, status updates of people you follow, updates to records you follow, and updates to groups in which you are a member.
- Create a chatter group that allows members to post updates and communicate with each other privately.
- Add attachments or links to a posting.
- Determine whether you want to follow a user or a record that has been enabled for Chatter.

You can modify the Chatter setup. For complete information about using Chatter, see the *Salesforce.com Help & Training*. This documentation is available if you click the Setup link to bring up Personal Setup. Then click the Help link.

## Turn Following On or Off

You can follow information about the following CA Clarity Agile or CA Clarity Requirements items using Chatter:

- Products
- Releases
- Requirements
- Features
- Sources
- User stories
- Tasks
- Issues

The Following option is enabled by default for items that you create. If you are not the creator of an item, the Following option is deactivated. But you can manually activate it.

You can tell if an item is followed by looking at the Following column on the list page.

**Follow these steps:**

1. Open the appropriate list page and locate the specific item in the list.
2. In the Follow column of the list item, choose one of the following options:
  - To follow the list item, click the green icon to the left of the word Follow.
  - To turn off the Following option for the list item, click the icon to the right of the word Following.

## How to View Different Types of Chatter Information

Chatter is available for both CA Clarity Agile and CA Clarity Requirements. The Chatter information that you view in either of these products pertains only to that product. The product supports the following Chatter information types:

- [View Chatter for all of the items that you follow.](#) (see page 88)
- [View Chatter activity for an item.](#) (see page 88)

### View Chatter for all Items that You Follow

The Chatter page lists the consolidated activity on all the items that you follow in either CA Clarity Agile or CA Clarity Requirements.

**Follow these steps:**

1. Go to the Requirements or Agile menu, depending on the Chatter information you want to view.
2. With the menu displayed, select Chatter from the Overview menu.

The complete list of Chatter activity for the items you follow appears.

### View Chatter Activity for an Item

A Chatter Feed is available from the detail page of an item, such as a requirement or user story. The Chatter activity is specific to the selected item.

**Follow these steps:**

1. Open the detail page of an item (for example, a specific requirement in CA Clarity Requirements or a specific user story in CA Clarity Agile).

2. In the View field, select Chatter Feed.

Chatter activity for the item appears.

## Chapter 14: CA Clarity Agile Access Rights

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The following user profiles are available with CA Clarity Agile:

### Super-user

A person with this profile has administrator privileges to CA Clarity Requirements data, but not to the Force.com operating environment. The super user can do any of the following tasks using features that are listed on the Administration menu.

- View, create, edit, and delete the following regardless of product membership. They also have the rights to participate in a product provided they are on the product team.
  - Product
  - Release
  - Sprint
  - Team
- View, create, edit, and delete the following, when on a product team:
  - Epics
  - User stories
  - Issues
  - Tasks
  - Themes
  - System administrator
  - Product owner
  - Regular user

### System administrator

A person with this profile has the rights to do the following tasks:

- Create new Salesforce.com users
- Create Agile users
- Create and manage all aspects of any product

### **A product owner**

A person with this profile has the rights to view, create, edit, and delete the following regardless of product membership. They also have the rights to participate in a product provided they are on the product team.

- Release
- Sprint
- Team
- Epics
- User Stories
- Issues
- Themes

The product owner cannot create products or add Agile/Requirements users.

### **Basic CA Clarity Agile user**

Has the rights to the following tasks:

- Participate in a product as part of the product team
- View products that they are a member of and associated releases and sprints
- Create, edit, and delete epics, user stories, issues, tasks, and themes
- Edit specific team attributes (for example, velocity, points, and virtual wall color mapping) once on the team

The basic user can only select the products for which they are members on the Home, Dashboard, Backlog, Sprint Backlog and Charts, and other pages where you can filter data based on the product. They can view and use the Sprint Backlog & Charts, Virtual Wall, Sprint Information, and Chatter Feed capabilities available from the Sprint Tracking menu.

For additional access rights information, contact your Force.com System Administrator.

# Appendix A: Glossary

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## Epic

An *epic* acts as a parent container for multiple child user stories that span multiple releases and sprints in a product. You can link epics to requirements to provide traceability and to help with the planning process.

## Product

Something of value a company produces for sale or internal company use. A *product* can be merchandise or wares, software, a building project, or any other consumable. Products also represent services, applications, or systems in an IT environment.

## Product Backlog

The list of current and upcoming user stories and associated issues for a product. A scrum team uses the backlog to determine what items they work on for a release or sprint.

## Product Owner

The scrum team member that is listed as the product owner in the properties of a product.

The product owner has privileges over all objects that are associated with the product, such a requirements, releases, sprints, and backlog items. The product owner does not need to be a scrum team member to work with user stories associated with the product.

## Read-Only Product Owner

A read-only product owner has privilege to view all objects that are associated with the product, such as releases, sprints, and backlog items. The read-only product owner does not have to be a team member. A System Administrator, Agile super user, Agile/Requirements super user, or product owner can give read-only rights to a user.

## Release

A *release* is similar to a project, an effort that ends with the delivery of value. The release usually entails a number of features and requirements.

## Requirement

A *requirement* is a documented specification that describes a particular product or service and what it can be or do. A statement that defines a necessary attribute, capability, characteristic, or quality of a product or service so that it provides value to a user.

## Scrum Master

The scrum team member is responsible for the daily tracking, problem solving, and the tasks that are associated with managing a release. The scrum master has to be knowledgeable about scrum and agile methodologies and procedures.

The scrum master generally moderates all planning, daily standup, and retrospective meetings.

**Scrum Team**

The group of people that is assigned to work on a release and sprints for a product. The team has the following roles: product owner, scrum master, and team member.

**Sprint Backlog**

The list of user stories and issues to which the scrum team has committed for a sprint.

**Task Worklog**

A log that a scrum member creates for a task that records how much time the member worked on the task.

**Team Member**

A member of the scrum team that works on user stories. A scrum team consists of a cross-functional group of members, including the following skills:

- Software development
- Quality assurance
- User interface or product design
- Technical documentation development

**Theme**

A container for user stories that groups them under a common purpose, such as user interface changes. Themes are useful because they can span releases and a user story can belong to more than one theme.

**User Story**

A *user story* is a way to define requirements in CA Clarity Agile. If these products are used together, a requirement in CA Clarity Requirements can be linked to its associated user story in CA Clarity Agile.