



SERENA®

SERENA AGILE ON DEMAND

Agile On Demand: Team Member's Guide

Serena Proprietary and Confidential Information

Copyright © 2003–2009 Serena Software, Inc. All rights reserved.

This document, as well as the software described in it, is furnished under license and may be used or copied only in accordance with the terms of such license. Except as permitted by such license, no part of this publication may be reproduced, photocopied, stored in a retrieval system, or transmitted, in any form or by any means, electronic, mechanical, recording, or otherwise, without the prior written permission of Serena. Any reproduction of such software product user documentation, regardless of whether the documentation is reproduced in whole or in part, must be accompanied by this copyright statement in its entirety, without modification. This document contains proprietary and confidential information, and no reproduction or dissemination of any information contained herein is allowed without the express permission of Serena Software.

The content of this document is furnished for informational use only, is subject to change without notice, and should not be construed as a commitment by Serena. Serena assumes no responsibility or liability for any errors or inaccuracies that may appear in this document.

Trademarks

Serena, TeamTrack, StarTool, PVCS, Collage, Comparex, Dimensions, Serena Dimensions, Mashup Composer, Mashup Exchange, Prototype Composer, Mariner, and ChangeMan are registered trademarks of Serena Software, Inc. The Serena logo, Version Manager, Meritage, and Mover are trademarks of Serena Software, Inc. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

Telelogic and DOORS are either registered trademarks or trademarks of Telelogic AB in the United States and/or other countries. Rational and IBM are either registered trademarks or trademarks of IBM in the United States and/or other countries. Eclipse is a trademark of the Eclipse Foundation in the United States and/or other countries. All other products or company names are used for identification purposes only, and may be trademarks of their respective owners.

U.S. Government Rights

Any Software product acquired by Licensee under this Agreement for or on behalf of the U.S. Government, its agencies and instrumentalities is "commercial software" as defined by the FAR. Use, duplication, and disclosure by the U.S. Government is subject to the restrictions set forth in the license under which the Software was acquired. The manufacturer is Serena Software, Inc., 1900 Seaport Boulevard, 2nd Floor, Redwood City, CA 94063-5587.

Part number: MA-AODDOC-003

Publication date: 2009-10-23

Table of Contents

- Agile On Demand 6
 - Guidance 6
 - Setup Projects and Users 7
 - Build a Backlog 9
 - Plan Releases 13
 - Allocate Work to Teams 16
 - Plan Sprints 20
 - Track Sprints 22
 - Application Toolbar 26
 - Change Password 27
 - Help 28
 - Log Out / Log In 31
 - Print 32
 - Rich Text Editor 34
 - Search 34
 - Settings 37
 - Setup 39
- Agile 42
 - Overview 42
 - Team Roles 43
 - Intervals 43
 - Planning 44
 - Products 45
 - Product Planning 45
 - Roadmap Planning 46
 - Releases 46
 - Release Planning 47
 - Release Status 47
 - Release Burndown 48
 - Sprints 49
 - Sprint Planning 49
 - Sprint Burndown 51
 - Daily Standup 52

Chickens and Pigs	52
Task Burndown	53
Sprint Review	54
Teams.....	54
Storyboard	55
Backlogs	56
Product Backlog	58
Release Backlog	58
Sprint Backlog	58
Team Backlog	58
Work Items	59
Epics	59
Stories	59
Tasks	60
Defects	60
Impediments.....	60
Actions	61
Backlogs	61
Settings	65
Guidance	69
Projects	70
Work Items	72
Summary	77
Work Types	79
Properties	84
Widgets.....	87
Burndown Chart	88
Card Wall	88
List	89
My Work	90
Summary View	91
URL Container	91
Widget Wireup.....	91
Reports.....	94
Charts	94

Datasheet Type Charts	98
Datasheets	100
Define Datasheets	101
Define Snapshots	103
Attributes.....	106

Agile On Demand

Together with partner Valtech, Serena presents a new way to become Agile. Serena Agile On Demand has been designed from the ground-up to support multi-project and multi-methodology environments. Innovative capabilities such as multi-team sprint and project planning, cross-team impediment management, and cross-team resource management make it simpler and more productive to manage concurrent agile projects.

- **Product backlog management** Organize features into releases according to strategic themes and see product-line support and multi-release views. Track and manage your agile processes. Evaluate against agile principles and metrics.
- **Release and sprint planning** User story estimation, including drag-and-drop allocation of user stories to sprints and real-time demand versus capacity displays. User story authoring, backlog management, and alignment of stories with strategic initiatives and themes.
- **Sprint execution and work management** Track time and work status, manage impediments, and allocate resources. Drag-and-drop assignable work items between backlogs. View backlogs in tree, grid, and list views. Use the card wall to view sprint status, along with a burndown chart.
- **Multi-teams, multi-projects** You can create multiple Agile teams to work along side your organization's many projects. Assign any work item from any project to any Agile team. Multi-team sprint and project planning, cross-team impediment management, and cross-project dependency management.
- **Configurable** Customize the Agile work item hierarchy. Customize views and forms. Define attributes.
- **Coach Live** Just-in-time virtual training and live coaching is only a click away.

For more information, see the following topics:

- [Guidance \[page 6\]](#)
- [Application Toolbar \[page 26\]](#)

Guidance

The **Guidance** section is a collection of scenarios and activities that are common within an Agile organization. The sections are broken out by areas, such as configuration (setting up projects and users), planning for releases and sprints, managing backlogs, and so on.

For more information, see the following topics:

- [Setup Projects and Users \[page 7\]](#)
- [Build a Backlog \[page 9\]](#)
- [Plan Releases \[page 13\]](#)
- [Allocate Work to Teams \[page 16\]](#)
- [Plan Sprints \[page 20\]](#)
- [Track Sprints \[page 22\]](#)

Setup Projects and Users

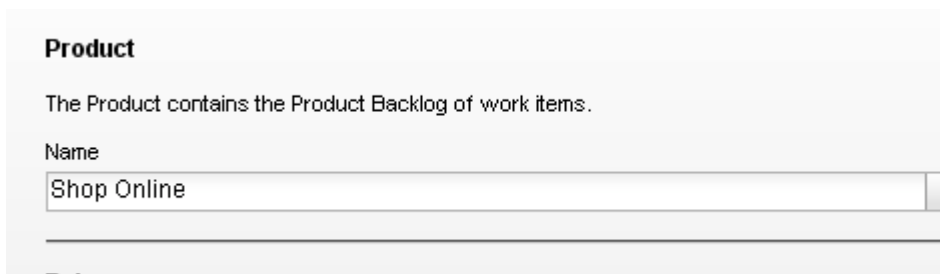
Before you can begin using Serena Agile On Demand, you must first build out your portfolio and add team members. Once created, any individual team member can be assigned to any work item in any team backlog.

Add project

A simple way to begin using Agile On Demand is to create the products, releases, teams and sprints that will comprise your Agile portfolio. Each of these items serves as an independent backlog to which work can added, moved, and tracked. The **New Project Wizard** is the fastest and easiest way to set up a product, release, team, and sprint structure.

To create a project using the New Projects Wizard

1. Open the **Backlogs** module.
2. Click **More**, and then select **New Projects** to open the **New Projects Wizard**.
3. Enter the name of the project that you wish to add. Or select the name of an existing product.



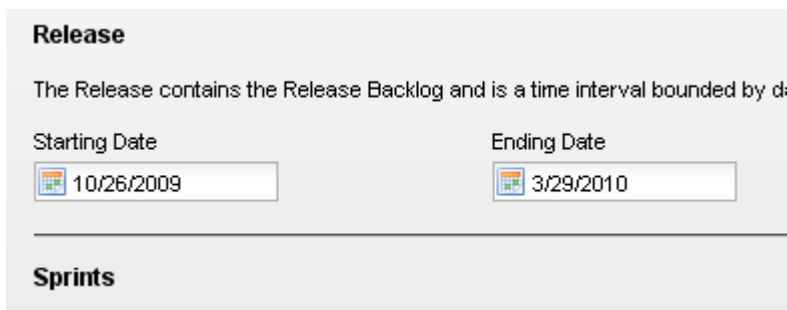
Product

The Product contains the Product Backlog of work items.

Name

Shop Online

4. Enter the name of the release that you wish to add. Or select the name of an existing release. Define the length of the release.



Release

The Release contains the Release Backlog and is a time interval bounded by dates.

Starting Date

Ending Date

10/26/2009

3/29/2010

Sprints

5. Select the interval length for each sprint. The number of sprints created depends on the overall length of the release and the number of sprints each release will contain. For example, if you specify that each release is 9 weeks, and then you select a 3 week interval for each sprint, each release will then contain 3 sprints.

Each Sprint contains a Sprint Backlog and is a time interval of the length specified. Sprints to fill the Release interval will be created for each Team.

Interval Length

2 weeks

1 week

2 weeks

3 weeks

Team Backlog and Sprints will be created within them.

6. Enter the name of a new team or select the an existing team, and then click **Add**.

Each Team contains a Team Backlog and Sprints will be created within them.

New Team Name

Front End

Add

Selected Teams

Infrastructure

Help

7. After you have selected your products and teams and defined the length of a release and the number of sprint intervals each will contain, click **Next**.
8. Verify that the projects, resources, sprints, and teams are the actual work types you wish to create, and then click **Finish**.
9. Verify in the backlogs tree that you have created the correct projects, resources, sprints, and teams.

Add user

After you have finished using the **New Project Wizard** to add products, releases, teams and sprints, the next step is to add your team members into the system. Once added, team members will be available to be assigned to stories, tasks, and other work items. Team members will be sent an invitation (via email), from which they can log on and begin using Agile On Demand.

To add a user


1. From the application toolbar, click **Setup**, and then choose **Manage Users**.

Elias Israel Setup Help Search Log Out

Manage Users

System Settings

Configuration

2. Click  Add.
3. Under **User Properties**, enter the first name, last name, email address, and user name for the user.

User Properties

First Name *

Last Name *

Email *

User Name *

☒ Active

4. Click  Save.

Build a Backlog

All of the work items that you and your teams will work on are stored in a backlog. As you progress towards completing the work that you are trying to do, the work items will move to, from, and between a product backlog and its supporting release, sprint, and team backlogs. But before you can begin working on work items that are stored in a backlog, you must first create those work items.

Import work items

You can use the **Import Data** tab to download the template (a Microsoft Excel file) into which you can enter data about items, resources, resource roles, and resource teams, and then bulk import that data.

In the template, there is a tab for each of the types of data that you can import: Investments, Resource Roles, Resource Teams, Resources, and Agile Work Items. On each tab, a row represents a single item, resource role, resource team, or resource that will be imported.

This is a feature that can be a useful way to add data, especially during the configuration phase of your deployment. However, this feature, when used carelessly, can add a lot of unnecessary data into your environment. Permission to use this feature should be granted carefully and only to people who are capable of removing unwanted data, should it get imported.

Some important things to remember:

- This is a feature that should not be viewed as a way to manage data on a day-to-day basis.
- The tabs are imported in the following order: **Resource Teams**, **Resource Roles**, **Resources**, and **Investments**. It can be easier to import data one tab at a time; if you import data one tab at a time, you should use the same order.


- Do not use characters in the template that are commonly used in Microsoft Excel as calculation indicators. For example, the ampersand symbol (&) may create a calculated cell and a calculated cell will fail upon import.
- You cannot have spaces in user names.
- Importing data should be done at times when there are no other users from your organization logged-in. The import process will fail when conflicts are caused by other work being done.
- There is no preview function.

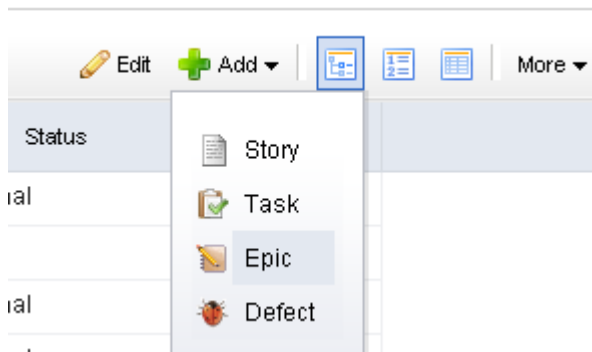
Depending on the amount of information you want to import, and the complexity of that information, you may need more detailed help, including descriptions of each tab in the template and a description of the messages you may encounter while importing information. You can get this information by clicking **Help** while working in the **Import Data** tab. Sometimes, access to attribute details within Agile On Demand may be necessary, and that access may require the assistance of your Administrator.

Author stories

Agile On Demand offers intuitive, fast, and robust story authoring capabilities. Simply navigate to a backlog and click "Add" to enter in a new Epic or Story. You can continue adding items quickly by clicking "Save and Add Another" after every item.

To author stories in a backlog

1. Select a backlog, choose  Add, and select the work item type you wish to add.



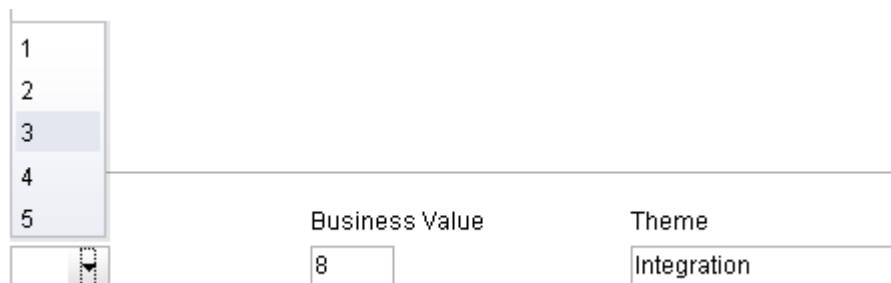
2. Enter the name and description for the work item.

Name

Description



Set the priority, business value, and theme.



1
2
3
4
5

Business Value: 8

Theme: Integration

3. Select the **Tracking** tab to assign an owner and to specify estimated and actual hours.



Product Owner: Elias Israel

Estimated Effort: 8

Remaining Effort: 8

4. Select the **Notes** tab to enter any notes that may be needed for the work item or for the team member assigned to the work item.



Notes

Rich text editor toolbar: Bold, Italic, Underline, Strikethrough, Bulleted List, Numbered List, Link, Unlink


5. When you are finished, click **OK** to save this work item and close the dialog box. If you want to create another work item, click **Save & Add Another**.


















Prioritize backlog


Before moving your stories between backlogs, such as from a release backlog to a sprint backlog, the work items in those backlogs should be prioritized. Prioritization (sometimes called stack-ranking) can be done in many ways, often depending on the phase of the process in which prioritization occurs.

- A product backlog often requires prioritization of major features (sometimes called epics) at a high level.
- A release backlog may require breakdown and elaboration of stories so that actual effort and dependencies may be factored in.
- A sprint backlog may need to be re-prioritized due to changes in staffing, the discovery of a defect that needs to be fixed, and so on.


Regardless of how or when a work item is prioritized, Agile On Demand makes it easy for you to move work items between backlogs, adjust priorities, change the ranking order,









and so on, so that you are using the most effective method for your team. When you are working in a backlog, be sure to set the view mode to  List.

Backlog Planning Multi Planning Product Owner Storyboard		
Products		
 Shop Online ▾		
Rank	Name	Estimated Effort
1	 Commission tracking for Partners and Affiliates	
2	  Cross selling	40
3	 Defects	0
4	  Partner & Affiliate tools	23
	 Affiliate manages their account information	5
	 Sign up for an Affiliate account	5
	 User can register multiple Affiliate site URLs in their company profile	5
	 View Affiliate commission balance	8
5	  Integrated inventory management	8
6	 Domain management	
7	 Gift certificates	
8	  Multi currency shopping	18





Viewing a backlog in list view mode will ensure that you can view work items by relative priority (where a higher rank equals a higher priority). (By default, Agile On Demand shows backlogs in the  Tree view mode, which does not rank stories.)

To prioritize stories in a backlog

1. Select a backlog and click  List.
2. Choose the story you want to re-rank, select it (by holding down the mouse button), and then drag it to its new relative priority.

1	 Commission tracking for Partners and Affiliates	
2	  Cross selling	40
3	 Defects	0
4	  Partner & Affiliate tools	23
	 Affiliate manages their account information	5
	 Sign up for an Affiliate account	5
	 User can register multiple Affiliate site URLs in their company profile	5

3. When the work item is in the location you want it to be, de-select it (by releasing the mouse button). The backlog will refresh and the work items will have been re-ranked according to their new relative priority.

		Count
1	 Commission tracking for Partners and Affiliates	
2	  Cross selling	40
3	  Partner & Affiliate tools	23
	 Affiliate manages their account information	5
	 Sign up for an Affiliate account	5
	 User can register multiple Affiliate site URLs in their company profile	5
	 View Affiliate commission balance	8
4	 Defects	0
5	 Integrated inventory management	0

Plan Releases

Release planning is an exercise of finding out which features that are defined in the product backlog will help the team meet its current release objectives, as defined by the product roadmap. In general, product owners use this view to manage the epics--a collection of stories that are too big for a single sprint--that the development team will work on during the release. Epics (and their related stories) can be grouped by themes, priority, and so on.

Move stories into release backlog

Release planning involves moving stories from the product backlog to the release backlog. Which stories and how many stories should be moved into the release will depend on the following factors:

- **Release Capacity** How many story points worth of work can the teams deliver in a release timeframe?
- **Release Goals** The Release may be a 50% usability and 50% new feature-work release. You can use the "Theme" attribute or another custom attribute to "tag" stories within themes or categories. You can then display a product backlog view grouped by those themes to better visualize how stories fit into those categories.
- **Priority** You may choose to stack rank stories and move stories from the top of the list, or you may choose to assign a priority value (e.g. 1-5) to every story.

Moving stories can be done from the Planning view as well as the Multi-Planning view. The Planning view supports two backlogs in one screen, whereas the Multi Planning view supports three backlogs in one screen. This is useful if you are moving items from two product backlogs into a single release, or a single product backlog into two releases, etc. Ultimately, which view you use is up to your preference. Use the one that your team finds most useful or create a custom planning view that maps to the way your team likes to do planning.

To move a work item to a new backlog

1. Select the work item you want to move, click and hold down the mouse button.

op Online

Beta

Edit Add

More

Rank	Name	Priority	Estimated Effort	Remaining Effort
1	+ Access store branches via subdomains	1	3	3
2	- Beta Defects		0	0
	- Defect 10156	2		
3	View past order details	2	13	13
4	- Send automatic notifications for out of	3	8	4

Platform

Platform - Sprint 1

Name
+ Login using SSL
+ Manage inventory from in-house system
+ View order status

Total

Platform

Platform - Sprint 2

2. When you get the work item to the new backlog, release the mouse button.

More

Platform

Platform - Sprint 1

Edit Add

More

Remaining Effort	Name	Priority	Estimated Effort	Re
3	+ Login using SSL	4	5	
	+ Manage inventory from in-house system	1	13	
0	+ View order status	3	5	
13				
4	Total		23	

Platform

Platform - Sprint 2

Edit Add

More

3. The backlog will refresh with the updated work item list.

Platform				
Platform - Sprint 1				
Edit Add M				
	Name	Priority	Estimated Effort	Remain Effort
3	Defect 10156	2		
	Login using SSL	4	5	
0	Manage inventory from in-house system	1	13	
3	View order status	3	5	
4				
Total			23	0
Platform				
Platform - Sprint 2				
Edit Add M				

Prioritize release backlog

Before moving your stories into sprints for execution, your backlogs should be prioritized. Prioritization (often stack-ranking) can be done at multiple planning levels. Prioritizing a release backlog requires a bit more precision than prioritizing the product backlog due to the closer delivery time-frame. Because of this, it is recommended that all prioritized release backlogs be stack-ranked in absolute order of priority. This provides clarity as to which stories should be moved into a sprint. Prioritizing a release may also require more break-down and elaboration of stories so that effort and dependencies may be factored into the prioritization. When you are in a backlog, make sure your view-mode is set to List mode, so that you can stack-rank stories in relative priority. By default, the Backlog view will display stories in Tree mode.

1	Integrated inventory management				
2	Multi-currency shopping				
3	Gift certificates				
4	Defects for Release: Alpha		0	0	Not Started
	Defect 11356				
5	Automated upsell recommendations				
6	Cross sell based on category		8	8	Not Started
7	Domain management		3	3	
8	Customer writes a review for a product		8	8	Not Started

Allocate Work to Teams

A team should use its velocity to determine how many stories to which it can commit in an upcoming sprint.

- A sprint assignment is the process of moving a story into a sprint backlog from a release backlog or a team backlog.
- A team assignment is the process of moving a story into a team backlog from a release backlog.

Teams frequently commit to more than one story per sprint, but it is important to understand that the effort required to complete the work required by a single story (including all of its related tasks and dependencies) is done in a single sprint by a single Agile team. Some assignments (like tasks) are identified before the sprint begins, while others (like defects and impediments) are discovered during the sprint.

Move stories into team backlogs

Once your release backlog is defined and prioritized, you can assign (move) stories from the release backlog to a team backlog. Although this is an optional step, there are certain benefits to moving stories to teams before the sprint. In cases where the team may be working on stories from multiple products, they may need to organize or plan their work before the sprint to account for technical dependencies and other multi-product (or project) issues.

A highly self-organizing team can often add value by tasking out stories before they go into sprint planning, and estimating stories in their team backlog on a regular basis. It's important to note that all stories in a team backlog should be stories that are planned in a current or upcoming release. Because sprints are created as child-objects of teams, any story that is moved into a sprint is automatically moved into the team backlog by the system. As a rule of thumb, teams should become very familiar with stories in their team backlog before they get to Sprint planning. This not only helps their velocity over time, but ensures better stories are developed with a better understanding of business goals and quality.

You can drag-and-drop stories between backlogs. Use the CTRL key to select multiple stories before dropping them into a new backlog.

Shop Online

Alpha ▾

Edit Add ▾

More ▾

Name	Priority	Estimated Effort	Remaining Effort
Automated upsell recommendations	3		
Cross sell based on category	1	8	8
Defects for Release: Alpha		0	0
Defect 11356	1		
Domain management			
Gift certificates			
Integrated inventory management			
Multi-currency shopping			

Teams

Commerce ▾

Name	
Customer writes a review for a product	3
Set payout schedule	2
View revenue source for commission sales	1

Total

Teams

Platform ▾

Name

To move a work item to a backlog

1. Select the work item you want to move, click and hold down the mouse button.

op Online

Beta ▾

Edit Add ▾

More ▾

Rank	Name	Priority	Estimated Effort	Remaining Effort
1	Access store branches via subdomains	1	3	3
2	Beta Defects		0	0
	Defect 10156	2		
3	View past order details	2	13	13
4	Send automatic notifications for out of	3	8	4

Platform

Platform - Sprint 1 ▾

Name
Login using SSL
Manage inventory from in-house system
View order status

Total

Platform

Platform - Sprint 2 ▾

2. When you get the work item to the new backlog, release the mouse button.

More ▾

Platform
Platform - Sprint 1 ▾
Edit Add

Remaining Effort	Name	Priority	Estimated Effort	Re t
3	+ Login using SSL	4	5	
	+ Manage inventory from in-house system	1	13	
0	+ View order status	3	5	
13				
4	Total		23	

Platform
Platform - Sprint 2 ▾
Edit Add

3. The backlog will refresh with the updated work item list.

Platform
Platform - Sprint 1 ▾
Edit Add

Name	Priority	Estimated Effort	Remain Effor
Defect 10156	2		
+ Login using SSL	4	5	
+ Manage inventory from in-house system	1	13	
+ View order status	3	5	
Total		23	0



Platform
Platform - Sprint 2 ▾
Edit Add


Prioritize team backlog

Use release planning and sprint planning meetings to determine which stories should be moved into a specific Agile team's backlog. A team backlog should contain stories that will be committed to by a specific Agile team for an upcoming sprint. Stories in a team backlog should be well-written, have a high priority and a high business value. Stories in a

team backlog should have an accurate story point estimate before being moved into a specific sprint backlog.

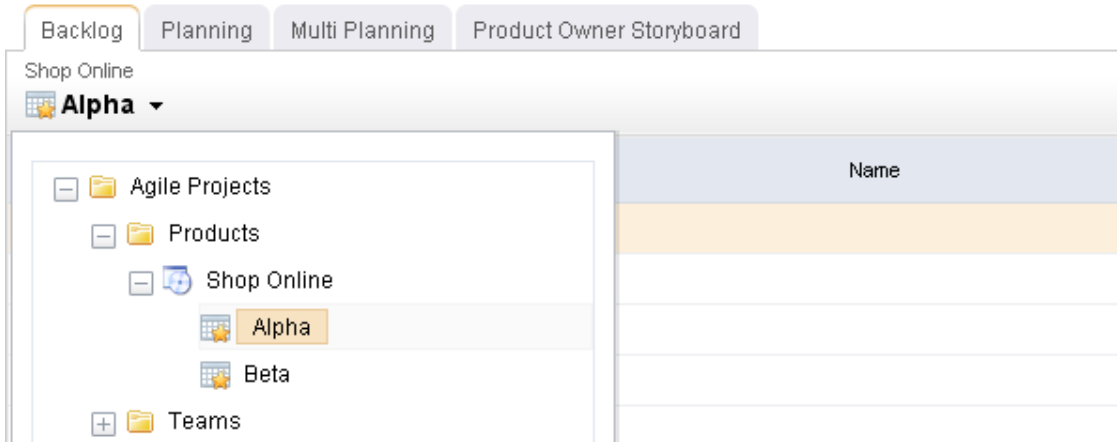
A work item in a team backlog can be moved to and from a release backlog (or another team's backlog) as needed, such as when business priorities change or when opportunities to create better business value arise. A work item in a team backlog can be added, edited, and removed as needed; however, any work item in a team backlog should have a high priority and a high business value.


Although managing team backlogs are optional, a team backlog may be prioritized by the team (with collaboration from the product owner) to account for technical dependencies and other factors that are unrelated to pure business priority. Note: When you are in the Backlog view, make sure your view-mode is set to  List, so that you can stack-rank stories in relative priority. By default, the Backlog view will display stories in  Tree mode.








You can prioritize a work item (sometimes called ranking a work item) in a backlog. Viewing a backlog in list view mode will ensure that you can view a work item by relative priority (where a higher rank equals a higher priority). (By default, Agile On Demand shows backlogs in the  Tree view mode, which does not rank stories.)

To prioritize stories in a backlog

1. Choose a backlog.



2. Click  List.
3. Choose the story you want to re-rank, select it (by holding down the mouse button), and then drag it to its new relative priority.

1	 Commission tracking for partners and affiliates	
2	 Cross selling	40
3	 Defects	0
4	 Partner & Affiliate tools	23
	 Affiliate manages their account information	5
	 Sign up for an Affiliate account	5
	 User can register multiple Affiliate site URLs in their company profile	5

- When a work item is in the location you want it to be, de-select it (by releasing the mouse button). The backlog will refresh and the work item will have been re-ranked according to its new relative priority.

		Effort
1	Commission tracking for Partners and Affiliates	
2	Cross selling	40
3	Partner & Affiliate tools	23
	Affiliate manages their account information	5
	Sign up for an Affiliate account	5
	User can register multiple Affiliate site URLs in their company profile	5
	View Affiliate commission balance	8
4	Defects	0
5	Integrated inventory management	0

Estimate team backlog

Estimating a backlog is often done with the team during collaborative sessions where the team provides technical input on the stories. Agile On Demand ships with a standard SCRUM configuration which allows estimation of stories by relative effort using story points (Fibonacci series of numbers).

Planning poker is a method of estimating the sizes of user stories during sprint and release planning meetings. Team members discuss a user story for a short period of time, after which team members assign that user story a points estimate. This is often done using Fibonacci numbers (1, 2, 3, 5, 8, 13, and so on), where the lower numbers are easier to work on. The team members with the highest and lowest estimates defend their positions, after which team members re-assign that user story a points estimate.



Velocity is a method of determining how many story points of work a team can commit to in a future sprint based on how many story points of work a team was able to complete in previous sprints. As a safe, general rule, a team should never commit to more story points in a sprint than their average velocity over the 2-4 previous sprints.

Plan Sprints

A sprint is where all of the actual work happens. Because of the importance of each sprint in a release cycle, it is important to ensure that the right stories are being added to a sprint, that all aspects of a team's velocity is considered while adding stories, and that any impediments that might jeopardize getting these stories done during the sprint are identified and addressed.

Plan sprint

Sprints can be planned after release backlogs have been defined, prioritized, and estimated. Moving stories from a release or team backlog into a team's sprint backlog is a simple matter of using drag-and-drop to move a work item from one backlog to another.

To move a work item into a sprint backlog, simply click the work item (and hold down the mouse button) while you drag it from one backlog to another.

To move a work item to a backlog

1. Select the work item you want to move, click and hold down the mouse button.

The screenshot shows the Jira interface with two sprints: 'Platform - Sprint 1' and 'Platform - Sprint 2'. In 'Platform - Sprint 1', a work item 'Defect 10156' is selected. A red circle with a diagonal line through it is placed over the 'Defect 10156' work item, indicating it is being moved. The 'Defect 10156' work item is highlighted in orange. The 'Platform - Sprint 2' backlog is visible on the right, showing a 'Total' row with a value of 23.

Rank	Name	Priority	Estimated Effort	Remaining Effort
1	Access store branches via subdomains	1	3	3
2	Beta Defects		0	0
3	View past order details	2	13	13
4	Send automatic notifications for out of	3	8	4

Name	Priority	Estimated Effort	Remaining Effort
Login using SSL	4	5	
Manage inventory from in-house system	1	13	
View order status	3	5	
Total		23	

2. When you get the work item to the new backlog, release the mouse button.

The screenshot shows the Jira interface with the 'Defect 10156' work item being moved to 'Platform - Sprint 2'. The 'Defect 10156' work item is highlighted in orange. The 'Platform - Sprint 2' backlog is visible on the right, showing a 'Total' row with a value of 23. A hand icon is shown clicking the 'Defect 10156' work item.

Remaining Effort	Name	Priority	Estimated Effort	Remaining Effort
3	Login using SSL	4	5	
0	Manage inventory from in-house system	1	13	
13	View order status	3	5	
4	Total		23	

3. The backlog will refresh with the updated work item list.

Platform

Platform - Sprint 1

EditAdd

	Name	Priority	Estimated Effort	Remain Effor
3	Defect 10156	2		
	Login using SSL	4	5	
0	Manage inventory from in-house system	1	13	
3	View order status	3	5	
4				
	Total		23	0

Platform

Platform - Sprint 2

EditAdd

Add tasks

User stories can be broken down into tasks by developers and testers to better track work after stories have been moved to the team backlog (for teams that plan ahead) or sprint backlog (for just-in-time planning). Tasks can be estimated via work-hours, to better reflect time spent by developers and testers. When you are working in a backlog, be sure your that the view mode is set to Tree so that the work hierarchy is visible (and so that a task shows as child work item of a story).

Track Sprints

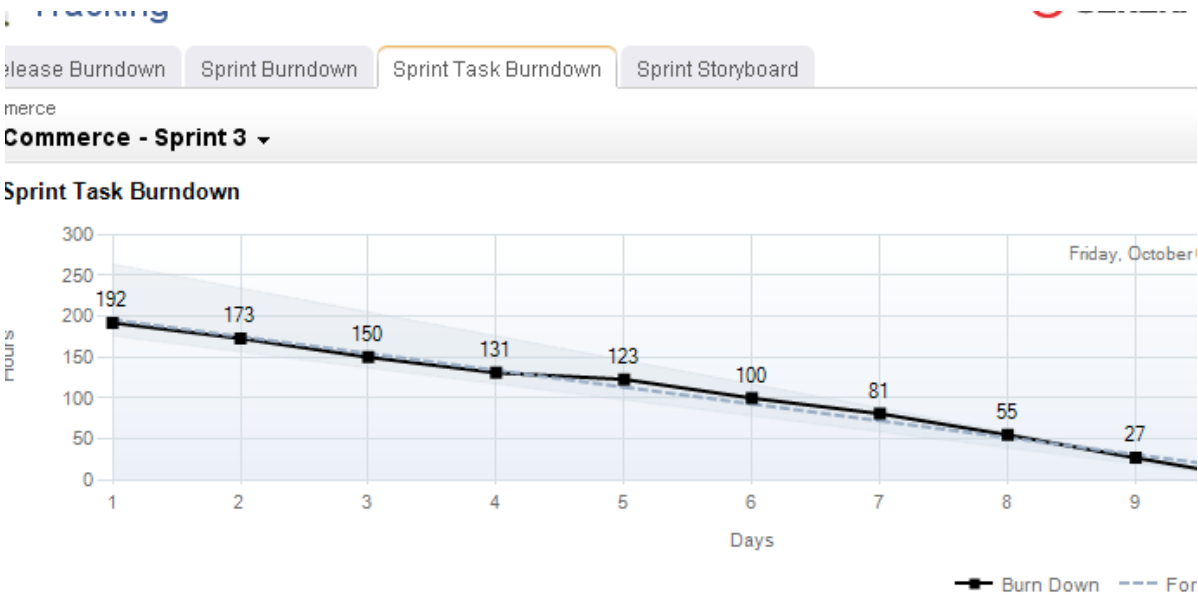
A sprint is where all of the actual work happens. Every day, team members gather in daily standup and quickly state what they have done, what they are going to do, and whether they have any impediments. Sprints rely on a team's velocity to determine how much work can be done in a future sprint and on a team's burndown chart to gauge how well a team is completing its work in a current sprint.

Daily standup

Daily standup occurs every day at a time that is convenient for all team members--usually in the morning--and often time-boxed at no more than 15 minutes. A burndown chart is used to view the team's overall status. The list of stories that are being worked on in the current sprint are viewed alongside a list of impediments (if there are any impediments). During standup, each team member addresses three key issues: what they have worked on since the previous daily standup, what they will work on today, and what impediments (if any) are present that could affect their current work item.

Because daily standup is a collaborative meeting, a given team may use multiple views to accomplish their daily standup goals. Many teams will choose to start by viewing their sprint burndown chart, from which the current health of a sprint can be viewed.

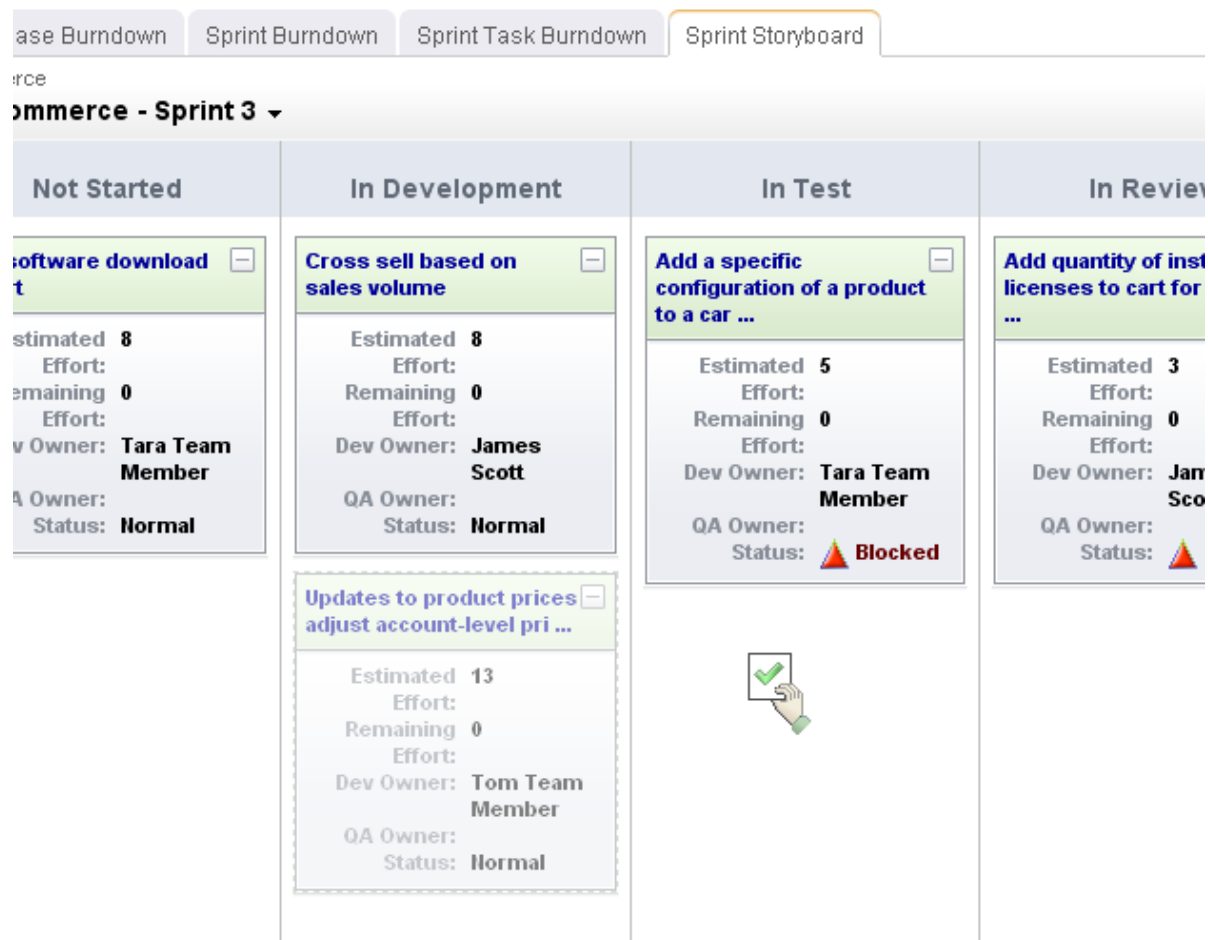
If your team has broken its stories down into tasks and is tracking task by hours, you may also want to review the sprint task burndown chart, which helps assess current progress by hours.



Commerce - Sprint 3 Edit Add

Name	Estimated Hours	Remaining Hours	Dev Owner	QA Owner	Task State
Parent= Add a specific configuration of a product to a cart	30	0			
Acceptance Tests	10	0	Tara Team Member		Complete

A storyboard can be used to view all of the stories in the sprint, often organized by work status and grouped into the following phases: Not Started, In Development, In Test, In Review, and Accepted. A storyboard cleanly shows the stories that are being worked on, by whom, and where that story is in the development cycle.



During standup, stories may be updated as information is shared among team members, stories may be transitioned from one phase to another, and so on.

Manage defects

A defect is a bug, an issue, or some problem with the quality of the product. Defects can be identified by customers, by members of your sales or support organizations, and (most often) by members of your own team (testers and engineers).

Serena Agile On Demand comes configured with a lightweight way to manage defects. Using this lightweight approach, any defect that is found during a sprint can be added as a defect, similar to how a task is added as a child to a story. If this approach is used, then that defect will need to be fixed before the parent story can be completed.

Platform

Platform - Sprint 3 Edit Add

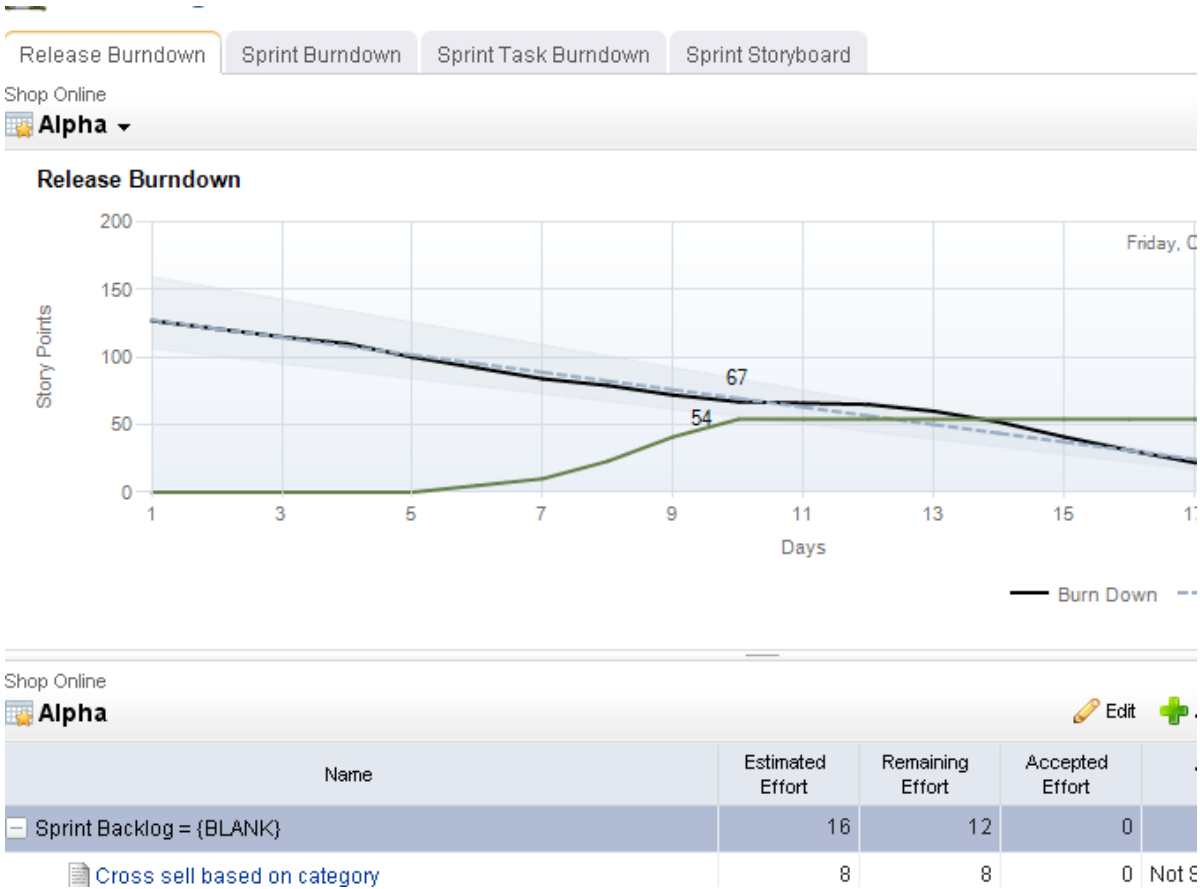
Name	Estimated Effort	Remaining Effort	Dev Owner	QA Owner	
Customer support chat	29	0			N
Product reviews	5	0			N
Email request to review a purchased product	5	0	Tara Team Member		N
Acceptance Tests			Tara Team Member		N

Story
 Task
 Epic
 Defect

Another approach is to create defects independently. Using this approach, defects should be grouped under a generic story called Defects (or the name that is most meaningful to your team) that is used in the same manner for all products, releases, and sprints. All defects live under this story and can be moved among backlogs as long as they are being moved as part of the same parent container.

Track release status

A release status meeting gives all team members (and other stakeholders) visibility into the current status of any given release. You can use a release burndown chart to help show the progress of the release, view the distribution of work item objectives as they relate to story points, and view a team's historical velocity. Release status is typically monitored by a product owner or by a group of stakeholders. In SCRUM, a release burndown chart is used as the primary method of monitoring the release status.

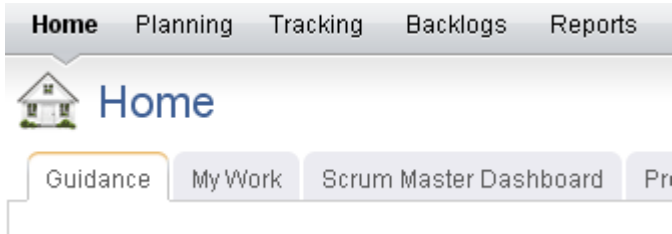


Review sprints

A sprint review meeting (or retrospective) should occur at the end of every sprint (and often at the end of every release too). A sprint review gives team members (and other stakeholders) to give each other honest feedback about how well the sprint or review was (or was not) executed. The purpose of the review is to identify areas of improvement, identify successes and failures, and to learn and grow as a team so that it can improve its performance in future sprints.

Application Toolbar

The application toolbar is the place around which most activites in Serena Agile On Demand are based. For example, the out-of-the-box configuration of Agile On Demand contains the following modules (from left-to-right: **Home**, **Planning**, **Tracking**, **Backlogs**, **Reports**, and **Tools**).



The application toolbar contains the following options and settings (from right-to-left: **Settings**, **Change Password**, **Setup**, **Help**, and **Search**).



To access any module, change settings, find the Serena Agile community, search within your portfolio, and so on, just click the application toolbar for the appropriate activity. Modules are configurable as well, so your administrator may have added custom elements to your application toolbar.

For more information, see the following topics:

- [Change Password \[page 27\]](#)
- [Help \[page 28\]](#)
- [Log Out / Log In \[page 31\]](#)
- [Print \[page 32\]](#)
- [Rich Text Editor \[page 34\]](#)
- [Search \[page 34\]](#)
- [Settings \[page 37\]](#)
- [Setup \[page 39\]](#)

Change Password

For each database to which you have been given access, your password is the same. Passwords are case-sensitive, and must be at least four characters long and must conform to the password policy settings for your organization. There are three password policy settings:

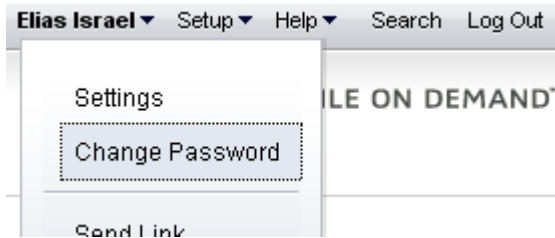
- **Strong** The password must be between 8-16 characters and must contain at least one number (0-9), one lowercase letter (a-z), one uppercase letter (A-Z), and one non-alphanumeric character (such as #, \$, !, or %).
- **Medium** The password must be between 8-16 characters and must contain at least one number (0-9), one lowercase letter (a-z), and one uppercase letter (A-Z). Default.
- **Weak** The password must be between 4-16 characters.

Change password

You can change your password at any time and as often as you want.

To change your password

1. From the application toolbar, select your name, and then choose **Change Password**.



2. In the **Change Password** dialog box, enter your current password, and then your new password (twice).

A screenshot of a 'Change Password' dialog box. It contains three input fields, each with a label and a password mask (dots). The first field is labeled 'Old Password'. The second field is labeled 'New Password'. The third field is labeled 'Confirm New Password'. The dialog box has a light gray background and a white border.

3. Click **OK**.

Help

Click **Help** to access the following additional resources: **Coach Live**, **Environment Info**, **Help**, **Product Blog**, **Support Forum**, **Tutorials**, and **What's New**. For more information about any of these additional resources, click one of the following tabs.

Coach Live

Valtech is a pioneer and a thought leader in the field of Agile software development. We have developed our own unique Agile adoption methodology built on the extensive experience of working in our own Agile environment for more than a decade. This approach provides the momentum and ready-to-use structure our clients need to "go Agile." We also provide accelerated knowledge transfer and just-in-time learning services to help with all phases of the Agile transformation.

Valtech is pleased to offer our Agile methodology expertise to the Serena Agile On Demand user community. Coach Live is your on-demand resource for Agile methodology coaching. With Coach Live, you can schedule time to talk with a Valtech Agile coach about any aspect of your Agile methodology. Valtech offers expertise to help companies of all sizes make the move to Agile and then to improve their Agile methodology and practices to achieve maximum performance.



Appointment times are
in central timezone

Coach Live Valtech

Dallas, Texas

1. Service & Staff

2. Date & time

3. Your details

4. Confirm

5. Finish

Service: 60 Minute Coaching Session

[Cl](#)

Staff: Jan B.

Select a Date & Time

October 2009

Monday, October 12

Su M T W Th F S

Morning

Afternoon

1 2 3

4 5 6 7 8 9 10

[8:00 am](#)

[12:00 pm](#)

11 12 13 14 15 16 17

[8:30 am](#)

[12:30 pm](#)

To schedule a Coach Live session, simply click the choose **Help** from the application toolbar and then Coach Live. Once you have opened Coach Live, select an available time slot of the desired duration, and follow the step-by-step instructions to schedule a session. Your specific Agile methodology questions are a vital part of the scheduling process. We want your Coach Live session to be as productive and to the point as possible. When you submit your questions or issues during the scheduling process, it gives our coaches a chance to think about, research, and collaborate on advice tailored to your specific situation.

1. Service & Staff

2. Date & time

3. Your details

4. Confirm

5. Finish

Confirm your appointment



Your appointment is not quite locked in yet! Please review your details below and if they are correct click the confirm button. After confirming you should soon receive an email confirmation. This email may contain additional instructions so please review it.

Appointment: 60 Minute Coaching Session
with Jan B.
on Monday, October 12, 2009 at 8:30 AM

[Chang](#)

Your details: Robert Forster
(650)-481-3400
rforster@serena.com

[Chang](#)

Additional info: Hi there. I would like to schedule a coaching session to

Coach Live is your on-demand resource for Agile methodology coaching. With Coach Live, you can schedule time to talk with a Valtech Agile coach about any aspect of your Agile methodology and practices. Valtech offers expertise to help companies of all sizes make

the move to Agile and then to improve their Agile methodology and practices to achieve maximum performance.

Coach Live provides your Agile On Demand account Named User the opportunity to schedule 30 - 60 minute sessions with a Valtech Agile coach. All team members who can benefit from a Coach Live session are invited to attend as well.

Environment Info

The **Environment Info** dialog box provides information about the connection type, database version, most recent update, and other information that may be helpful if you ever need to talk with Serena Support.

Current User	
Connection Name	QABVT01_AOD_SpudDB_20091007_02
Database Version	2009.04.00.0002
Last Database Update	Mariner_2009_04_Migration.sql
Last Updated On	10/7/2009

Help

The **Help** will open the documentation for the product. Most help links are context-sensitive; the topic that is opened usually depends on the location from which you clicked help.

nts

Agile On Demand

Release Notes

Guidance

Setup Projects and Users

Build a Backlog

Plan Sprints

Track Sprints

Allocate Work to Teams

Plan Releases

Application Toolbar

File

Reports

Resources

Workspace

Manage Users

System Settings

Configuration

Reference

[Agile on Demand](#) → [Guidance](#) → Setup Projects and Users

Setup Projects and Users

Before you can begin using Serena Agile On Demand, you must create team members. Once created, any individual team member can be assigned to stories, tasks, and other work items. Team members can then log on and begin using Agile On Demand.

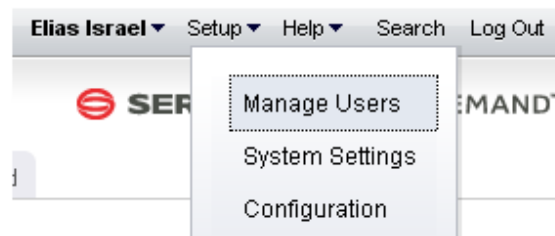
Add project


Add user

After you have finished using the **New Project Wizard**, the next step is to add team members into the system. Once added, team members can be assigned to stories, tasks, and other work items. Team members can then log on and begin using Agile On Demand.

To add a user

1. From the application toolbar, click **Setup**, and then click **Manage Users**.



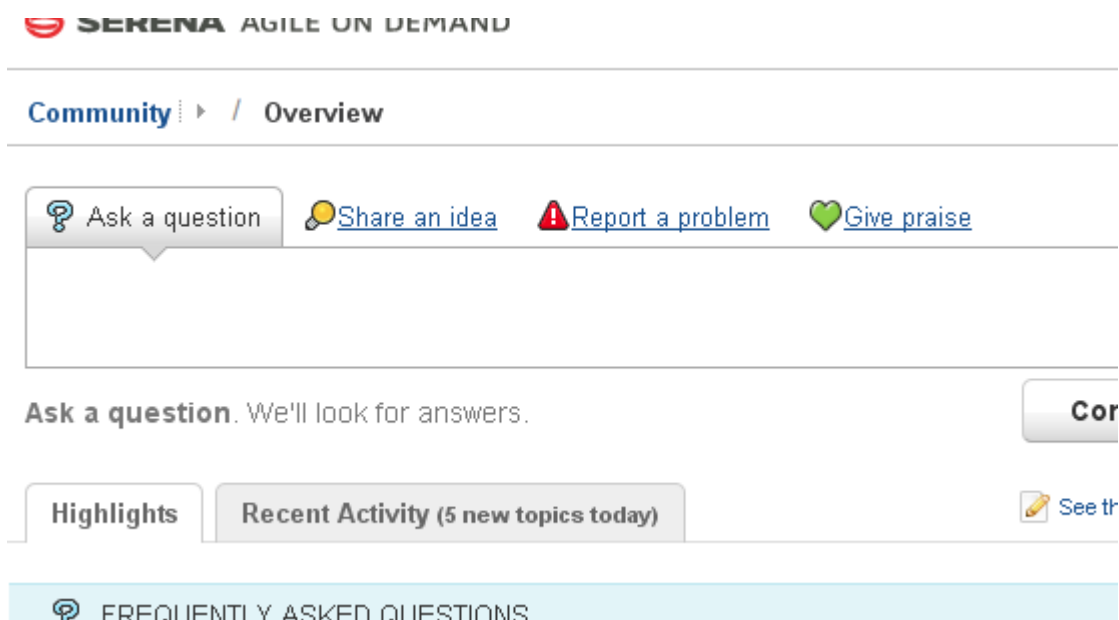
2. Click Add .
3. Under **User Properties**, enter the first name, last name, and email address.

User Properties

When you are viewing Help, you can navigate the full contents of the help using the left-side TOC. Click a topic that has an arrow next to it to view subtopics. You can use the breadcrumbs found across the top of many of the topics to navigate back up the hierarchy. Most topics that have child topics will have a mini TOC within the topic. Many topics also contain tabs, generally for task-based topics, but not always. Additional help can be found at the top in the tabs. For example, Agile On Demand has the Agile 101 tab, which contains methodology content from Valtech. There is also a simple search feature. Though it's not as powerful as Google, it should help you find the topics in the help collection that contain the words from your query. To return to the full help TOC (after viewing a topic you have searched for), simply click the Help tab at the top.

Support Forum

The Serena Support forum is a place where you can see highlights and questions that have been asked by other customers, including answers to issues other customers may have run into while using the product. There are two ways to find the support forum: from the application toolbar, click **Help** and then **Support** or click **Feedback**. They are different access points into the same support system.



Log Out / Log In

Before you can access modules, views, and other features, you must first log on with your username and password. When you are finished, you should log out.

Log out

When you are finished working, you should log out.

To log off

1. From the application toolbar, click **Log Out**.

Log in

Before you can access modules, views, and other features, you must first log in with your user name and password.

To log on

1. Type your user name and password. Click **Log In**
2. Select your database. Click **Continue**.

Print

When you click the **Print** button on the application toolbar in the **Charts**, **Summary**, and **Timegrid** tabs in the **Reports** module, or in the **Financials** tab in the **Projects** module, the **Print** dialog box opens. When you print a datasheet, chart, or financials data using the **Print** dialog box, it is printed to a portable document format (PDF (.pdf)) file. The **Print** page contains two tabs, the **General** tab and the **Options** tab. The **General** tab is used to define the general and margin settings, including the font, paper size and orientation, and page numbering used for the PDF (.pdf) file. After filling out the **General** and **Options** tabs, click the **Print** button on the **Print** dialog box to print the datasheet or chart to the PDF (.pdf) file.

To print to a PDF (.pdf) file and view the PDF (.pdf) file, Adobe Acrobat Reader 6.02 or later must be installed on the machine from which you are printing.

- **Font** Select the font and font size to use from the **Font** lists.
- **Paper Size** Select the size of the paper you want to use.
- **Orientation** Select *Portrait* to print using the portrait orientation. Select *Landscape* to print using the landscape orientation.
- **Include page numbers** Select this option to include page numbers on each page.
- **Save Settings** Select this option to save your general and margin settings on the **General** tab. When **Save Settings** is selected, the settings on the **General** tab will be the default settings each time you open the **Print** dialog box. Selecting **Save Settings** does not save your settings on the **Options** tab.
- **Left** Type the left page margin you want to use for the pages of the PDF (.pdf) file in inches.
- **Right** Type the right page margin you want to use for the pages of the PDF (.pdf) file in inches.
- **Top** Type the top page margin you want to use for the pages of the PDF (.pdf) file in inches.
- **Bottom** Type the bottom page margin you want to use for the pages of the PDF (.pdf) file in inches.

The view you are currently in determines the boxes available on the **Options** tab. In the **Charts** tab, the **Options** tab is used to determine whether all of the selected datasheet's charts are printed or just the currently selected chart. In the **Summary** and **Timegrid** tabs, the **Options** tab is used to determine whether charts defined for the selected datasheet's dashboard are printed to the PDF (.pdf) file, whether text wraps when the datasheet is printed, and the column settings for the PDF (.pdf) file. In the **Financials** tab, the **Options** tab is used to determine whether the PDF (.pdf) includes the *Self*, *Roll-up*, and *External* values, entries from the **View** pane, and/or the Breakeven chart for the work item. The **Options** tab is also used to define the maximum number of columns allowed on a page.

After filling out the **General** and **Options** tabs, click the **Print** button on the **Print** dialog box to the PDF (.pdf) file.

When you print a chart to a PDF (.pdf) file, only the default attributes defined for the chart on the **Attributes** tab and the default datasheet snapshot defined on the **Chart Settings** tab on the **Chart Properties** dialog box are used for printing the chart. Default attributes are the first attribute listed in each parameter box on the **Attributes** tab. The default datasheet snapshot is the snapshot selected in the chart using this data list on the **Chart Settings** tab.

To print datasheets or charts to a PDF (.pdf) file and view the PDF (.pdf) file, Adobe Acrobat Reader 6.02 or later must be installed on the machine from which you are printing.

- **All Charts** Select this option to print all of the selected datasheet's charts.
- **Selected Chart** Select this option to only print the chart currently selected in the **Charts** tab.

For the **Options** tab in the **Reports** module, **Summary** tab:

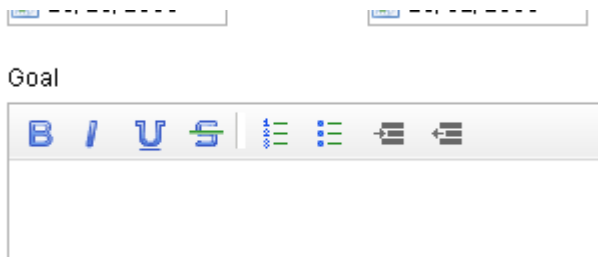
- **Include Dashboard Charts** Select this check box to print the charts defined for the selected datasheet's dashboard. When you print a chart to a PDF (.pdf) file, only the default attributes defined for the chart on the **Attributes** tab and the default datasheet snapshot defined on the **Chart Settings** tab on the **Chart Properties** dialog box are used for printing the chart. Default attributes are the first attribute listed in each parameter box on the **Attributes** tab. The default datasheet snapshot is the snapshot selected in the chart using this data list on the **Chart Settings** tab.
- **Include Summary** Select this check box to print the datasheet's summary information with the datasheet. The **Include Summary** check box is selected by default. Clear the check box to exclude the datasheet's summary information from the datasheet.
- **Maximum Columns Per Page Type** The maximum numbers of summary columns to print on a page for the selected datasheet.
- **Percentages** The **Percentages** box displays the current column width percentages for each column of the summary section on the selected datasheet.
- **Allow Cells to Wrap** Select the **Allow Cells to Wrap** check box to have the text in the datasheet's cells wrap when you print the datasheet. Clear the check box to turn off the text wrapping.
- **Include Timegrid** Select the **Include Timegrid** check box to print the datasheet's timegrid data with the datasheet. The **Include Timegrid** check box is selected by default when there is timegrid data on the selected datasheet. Clear the check box to exclude the datasheet's timegrid information from the datasheet. (This check box is only available in the **Timegrid** tab.)
- **Maximum Columns Per Page Type** The maximum numbers of timegrid columns to print on a page in the **Maximum Columns Per Page Type** box for the selected datasheet. (This box is only available in the **Timegrid** tab.)
- **Percentages** The **Percentages** box displays the current column width percentages for each column of the timegrid section on the selected datasheet. The percentages for each column of the timegrid section on the selected datasheet. The columns are listed from left to right. (This box is only available in the **Timegrid** tab.)

For the **Options** tab in the **Financials** tab:

- **Include Details** Select the **Include Details** option to include all *Self*, *Roll-up*, and *External* values, as well as any work item from the View pane for each tab in the **Financials** tab in the PDF (.pdf).
- **Include Breakeven Chart** Select this option to include the Breakeven chart for the work item in the PDF (.pdf).
- **Maximum Columns Per Page Type** The maximum numbers of columns to print on a page.

Rich Text Editor

The rich text editor is enabled for description fields. It allows simple formatting of contents within these description fields, such as bold, italics, underlines, or strikethroughs. You can add ordered or unordered lists. You can indent and outdent text.



Search

The **Search** dialog is used to search for a work item, log entry, resources, documents, and work item types. You can access the **Search** dialog from every view. The **Search** dialog consists of a standard search view and an advanced search view for refining your search. To open the advanced search view, click **Advanced**. To hide the advanced search view, click **Hide Advanced**.

Search

The search feature allows you to find any searchable attribute found in a work item, log types (such as issues, risks, or documents), or resources. In the default mode, you can specify the type of match you want (any or all words), a particular attribute to search in, and the object type. When searching against **All Investments**, a log item, any work item, and resources will not be included in the search results.

To search for attributes, log types, work items, and resources

1. In the application toolbar, click **Search**.
2. Enter the details for the search query you wish to make. Click **Advanced**

A screenshot of the Search dialog box. It has four main sections: 'Search for' with a text input containing 'DEF287262'; 'In attribute' with a dropdown menu showing 'Description'; 'Match' with two radio buttons, 'any word' (selected) and 'all words'; and 'Display' with a dropdown menu showing 'Defect'. To the right of these fields are two buttons: 'Search' and 'Advanced'. Below the dialog box, there is a table header with two columns: 'Name' and 'Description'.

3. Click **Advanced** to add rules, rule details, search within documents stored in Agile On Demand, or search across all project types.

The screenshot shows a search configuration interface with the following sections:

- Rules:** An empty list box with a vertical scrollbar.
- Rule Detail:**
 - Logic: ☒ And ☐ Or
 - Attribute:
 - Comparison:
 - Compare To: ☒ the specific value ☐ another attribute
 - Value field:
- Documents:** Search In ☒ Keywords ☒ Title ☒ Description
- Extended Options:** ☒ All Project Types ☐ Selected item and descendants

4. Click **Search**.

Search criteria

When you are searching for documents, document file names are always searched, and can search document keywords, title, and/or description. Text within a document is not searched. When you are searching datasheets, the work item hierarchy for all portfolios is searched or the selected portfolios and its descendants in the **Reports** tab, it does not search a datasheet's resulting data.

- **Search for** Type the text you want to search for in this box. You can enter a any alpha-numeric value. To search for a specific string, enclose the text in quotation marks.
- **In Attribute** This drop-down list enables you to select a specific attribute to search. This can help refine your search and reduce false-positive returns. For example, if you want to find a work item and know that the work item name contains the term "router", you can search only for instances of the word "router" in the *Name* attribute. Your administrator determines which attributes are searchable. All searchable attributes are included in this drop down list.
- **Match: any word** Select this option to have the search results include any of the text you typed.

- **Match: all words** Select this option to have the search results include all of the text you typed. To search for a specific phrase, type quotation marks at the beginning and end of the phrase in the **Search for** box.
- **Display** To further refine your search, use this option to specify the object type against which your search executes. You can choose to search only work item types or a particular work item type, all logs or a particular log type, or only for a work item, resources, or documents. For example, if you are searching for the term "router" in the *Name* attribute, and you know that the work item for which you are searching is a project, specify *Project* in the display drop down.
- **Search** Click the **Search** button to start the search.
- **Advanced** When you click the **Advanced** link on the **Search** page, the following features are available for refining your search. You can hide the advanced search features by clicking the **Hide Advanced** link on the Search page.

Advanced Search criteria

The **Advanced Investment Criteria** section is used to search for specific work item data.

- **Rules** Lists all of the current rules set up for the work item search criteria.
- **Up** Moves the selected rule up in the **Rules** list.
- **Down** Moves the selected rule down in the **Rules** list.
- **Delete** Removes the selected rule from the **Rules** list.
- **And** Select this option to indicate that the work item you are searching for must meet the conditions of the selected rule and all other rules that do not begin with **Or**.
- **Or** Select this option to indicate that the work item you are searching for must meet the conditions of the selected rule, or all the rules that do not begin with **Or**, or another rule that begins with **Or**.
- **Attribute** Select the attribute you want to create a search rule for from this list. Only the attributes that have been marked as searchable in the **System Settings** module are displayed in the **Attribute** list.
- **Comparison** Select the test you want to apply to the attribute selected in the **Attribute** list.
- **Comments To** Select what the search criteria should compare the attribute to: This specific value. Select the this specific value option and type a value in the box below the options to only search for a work item with the **Comparison** relationship to the value you specified for the selected attribute. If you are searching for a percentage value, type the percentage decimal value in the **Comments To** box. For example, you would type .20 in the **Comments To** box for 20 percent. Select the another attribute option and select an attribute from the list below the options to only search for a work item with the **Comparison** relationship between the two selected attributes.
- **Update** Click this button to update the selected search rule.
- **Add** Click this button to add the rule to the search.

- **Documents** This section is used to determine whether to use document keywords, title, and/or description when searching for documents. Document file names are always searched.
- **Keywords** Select this check box to search document keywords when searching for documents.
- **Title** Select this check box to search document keywords when searching for documents.
- **Description** Select this check box to search document descriptions when searching for documents.
- **Extended Options** This section is used to determine whether any work item is searched or only the work item and its descendants currently selected in the Items pane.
- **All Investments** Select this option to search any work item.
- **Selected investments and descendants** Select this option to only search the work item currently selected in the **Portfolios** pane and any descendants.

Settings

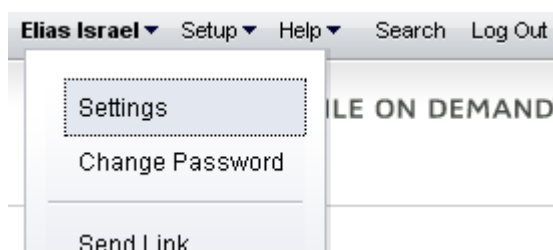
Use the **Settings** dialog box allows you to configure the tabs you want available from your homepage, whether you want to receive email notifications, and the sorting order for a work item.

Homepage

Your homepage is available from the application toolbar. You can choose which tabs you want to have on your homepage. In addition to the out-of-the-box homepages, such as **My Work** or a role-based dashboard, your administrator may have configured additional homepages.

To configure your homepage

1. From the application toolbar, select your name, and then choose **Settings**.



2. In the **Settings** dialog box, choose the tabs that you want to make available from your homepage. Move the homepages that you want to use to the right. The tabs will appear in your homepage from left-to-right based on the order (top-to-bottom) they appear in the **Settings** dialog box.

Homepage

Available Homepage Tabs

Guidance
Product Owner Dashboard
Scrum Master Dashboard
Stakeholder Dashboard



Selected Homepage Tabs

My Work



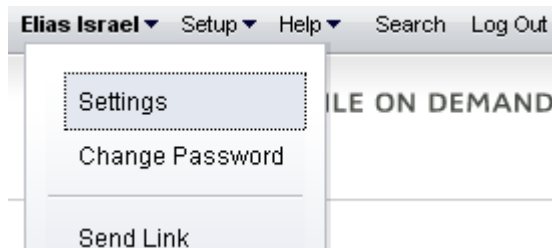
3. Click **OK**.

Notification Settings

You can choose to receive email notifications for any notification you have configured from the **Define Notifications** tab from the **Tools** module.

To configure notification settings

1. From the application toolbar, select your name, and then choose **Settings**.



2. In the **Settings** dialog box, indicate whether you want to receive email notifications, and then select the email locale you wish to use.

Notification Settings

☒ Receive Notifications as Email

Email Locale

English - United States



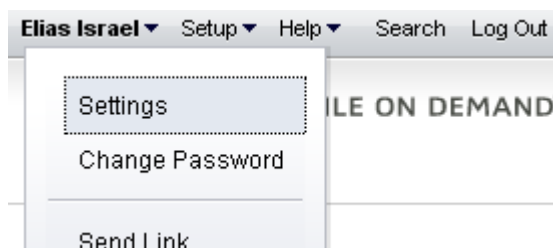
3. Click **OK**.

Sorting order

You can pick any work item attribute to use as the primary sorting preference for a work item, such as **Name**, **Estimated Hours**, or **Start Date**. This sort order preference is available from any backlog when that backlog is viewed using the **Tree** option.

To configure your work item sorting order preference

1. From the application toolbar, select your name, and then choose **Settings**.



2. In the **Settings** dialog box, select the work item attribute you wish to sort a work item by, and then choose **Ascending** or **Descending**.

Item Tree Sort Order

Sort By

Name

- ☒ Ascending
☐ Descending

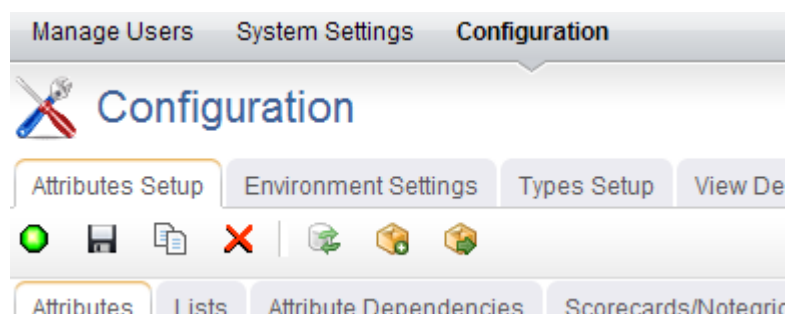
3. Click **OK**.

Setup

Click **Setup** to manage users, configure the application, and change settings.

Configuration

After you have created users, added licenses, defined security roles (and assigned users to them), you are ready to configure the application. The **Customization** module is used to manage the work item types, attributes, and views that your organization wants to use.



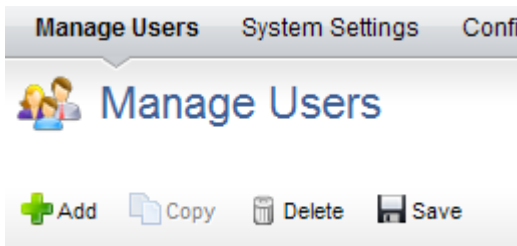
The **Configuration** module helps you configure the following:

- **Attributes Setup** You can use the **Attributes Setup** tab to create and manage work item type attributes.
- **Environment Settings** You can use the **Environment Settings** tab to manage system settings, such as documents management, workflow, and reporting server settings or to configure system notifications.
- **Module Designer** A module (sometimes called a homepage) can be used to provide a daily starting point for members of your organization, including individual contributors, project and resource managers, portfolio analysts, and so on. You can use the **Module Designer** tab to create and modify homepage layouts and to help provide a centralized view into the information that users in your organization need.

- **Types Setup** A work item is what users in your organization use to create, plan, manage, and analyze your projects. They can be assets, programs, projects, or portfolios. They can be the stages in a lifecycle, such as a request, an approval, or a rejection. They can be the phases in an Agile lifecycle, such as projects, releases, and sprints. They can have dependencies on another work item.
- **User Synchronization** You can use the **User Synchronization** tab to manage the XML configuration file that contains the field mappings between attributes and a directory service, such as Active Directory or Novell eDirectory. When you create a provider, you have the option of managing some aspects of that provider in the **User Synchronization** tab.
- **View Designer** You can use the **View Designer** tab to modify the layout of financials views and to create custom summary views for use in the **Projects** module. Custom summary views are also used to layout item request pages.
- **View Management** You can use the **View Management** tab to manage work item types, log views, and the order in which views appear in modules.

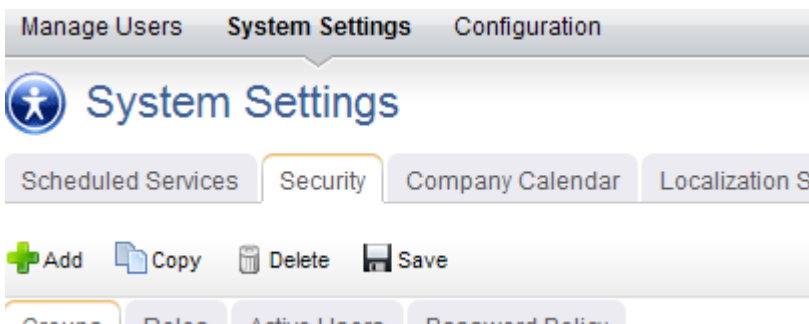
Manage Users

The **Manage Users** module helps you manage the users of your application. You can add, edit, and delete users, you can change the roles to which users belong, and you can reset passwords.



System Settings

The **System Settings** module is used to set up and configure financial settings, scheduled services, calendar settings, localization settings, system notifications, licenses, and security configuration for your organization.



The **System Settings** module helps you configure the following:

- **Company Calendar** You can use the **Company Calendar** tab to customize the calendar being used by your organization. You can define your organization's working and non-working days, you can define the days in your organization's working week, and you can define the number of hours in a day that makes up a full working day. These settings are used to determine resource capacity and scheduling

for resources that are used in task plans or for the number of days that can appear in a sprint burndown chart. Individual resources have their own calendars and they may override company calendar settings in their local calendar (if they are given permission to do so).

- **Localization Settings** You can use the **Localization Settings** tab to modify the strings that appear in the application's user interface. This can help your organization address any localized language requirements that you may have. If you add new elements, such as views, attributes, forms, or charts, you will be able to localize the strings associated with the new elements.
- **Scheduled Services** You can use the **Scheduled Services** tab to create and maintain scheduled jobs and plug-ins. Jobs that are in the queue are run sequentially, with the next job in the queue starting after the current one is finished. In general, most jobs should be scheduled to run at off-peak times.
- **Security** You can use the **Security** tab to manage the users and groups of users who will be working, and to define the security roles that allow them to access the **Projects, Reports, Resources, Tools, System Settings**, and **Customization** modules.
- **System Notifications** You can use the **System Notifications** tab to manage the notifications that will be available to all of the users in your organization. System notifications are available for many events associated with the lifecycle of a work item, such as adding resource allocations or assigning risks. The full list of system notifications is available in the **System Notifications** tab.

Agile

Agile software development is an approach to building software in a way that promotes short iterations that can be repeated throughout the entire lifecycle of a project. Although there isn't a single Agile method or methodology, they all do share a common approach, often using short 2- to 3-week sprints (sometimes called iterations) to build and then release features to customers. Agile teams are comprised of stakeholders from across the organization. Face-to-face is the preferred method of communication. It is important to note that Agile is not a methodology in which there are no rules. In fact, many Agile teams follow very disciplined and rigorous processes to achieve their goals, and much use is made of project management skills and tools.

For more information, see the following topics:

- [Overview \[page 42\]](#)
- [Actions \[page 61\]](#)
- [Widgets \[page 87\]](#)

Overview

The ideal Agile process is simple and repeatable. It's scope is high-level, but with specific goals. Scope is defined in a product roadmap. Goals are the features that add business value to the product. The process relies on similar patterns across levels, but with a greater focus on detail as a team gets closer to doing actual work. This does not mean that making that process work is easy. In fact, making an Agile process work can be hard, but the steps within the process itself are simple.

Every Agile process relies on basic framework:

- **Work Type** An Agile process has defined relationships between the types of work done during each stage in the process. For example, a project contains one or more releases, a release contains one or more sprints, and every working day in a sprint contains a daily standup.
- **Work Items** A work item is an epic, story, or a task. An epic can contain one or more stories, a story can contain one or more tasks. A work item is always stored in a backlog and should be discussed in planning meetings. During daily standup, every team member answers the same questions about any work item to which they have been assigned.
- **Backlogs** An Agile process has a common backlog, from which any specific work item is associated to a release backlog or to a sprint backlog. In general, as the work type gets smaller, two things should happen: the size of a work item that is associated with it should get smaller and the amount of information contained within that work item (description, acceptance criteria, technical notes, story sizing estimates, and so on) should get larger.
- **Teams** Every Agile process is highly dependent on the quality of its team members. Product owners. Scrum masters. And individual team members.

The relative simplicity of an Agile process helps your organization move past the traditional project management focus on process and helps to put more emphasis on the interactions between team members towards deliverables and towards customer's needs and requests. After you have completed each step in the Agile process (such as

completing a sprint, release, or product), your team should have a retrospective, discussing what went well and identifying areas of improvement.

The following diagram shows the relationships between all of the elements in the Agile lifecycle, including a work type (product, release, sprint, and team), any work item types (epic, story, task, impediment, and defect), planning (product, release, and sprint), and backlogs (product, release, sprint, and team).

Even though the basic structure of Agile is used by most organizations that use Agile, their approach to the details is rarely the same. There will be different names for a work item, work type, or backlog. There will be different relationships and orders of any work type. There will be different lengths of each phase within the lifecycle. There will be different approaches for how a work item is managed and defined in the backlog.

In order to make Agile work well in your organization, you need to constantly refine it and sometimes re-define it. The relationships of the a work type, a work item, and a backlog is (in part) defined by your organization's work breakdown structure and (in part) defined by how your organization chooses to measure business value. In other words, the success of any Agile process has as much to do with an organization's commitment to Agile as it does to how an organization chooses the actual steps within the process.

For more information, see the following topics:

- [Team Roles \[page 43\]](#)
- [Intervals \[page 43\]](#)
- [Storyboard \[page 55\]](#)
- [Backlogs \[page 56\]](#)
- [Work Items \[page 59\]](#)

Team Roles

Many Agile organizations are comprised of the following roles:

Role	Description
Product Owner	An individual who represents the voice of the customer and manages what is in (or not in) a backlog (product, release, and sprint).
Scrum Master	An individual who leads the team during a sprint, including running daily standup, tracking velocity, and dealing with impediments that may have been identified by team members.
Team Member	A team member is a member of a team. A team comprises all of the team members who commit to all of the work required to complete a single story during a single sprint, including all tasks and dependencies that are related to that story.

Intervals

There are four primary intervals (also called a work type) in the Agile process:

Interval	Description
Products	Products contain one or more releases, into which any high priority and high business value work item can be moved. A product roadmap is used to outline what will be done over the next 2-4 releases and it helps drive all work item movement into a release backlog.
Releases	Releases contain one or more sprints. As each upcoming sprint is planned for, well-written stories will be moved into the sprint backlog. As each sprint is completed, a review meeting is held where the successes and failures of the current sprint are openly discussed among team members and the new and/or improved features are demonstrated to the team and other product stakeholders. After all sprints in a release are completed, actual progress is compared to expected progress (as outlined in the product roadmap).
Sprints	A sprint is where all of the actual work happens. Every day, team members gather in daily standup and quickly state what they have done, what they are going to do, and whether they have any impediments. Sprints rely on a team's velocity to determine how much work can be done in a future sprint and on a team's burndown chart to gauge how well a team is completing its work in a current sprint.
Teams	Teams contain all of the individual team members who belong to a single SCRUM team.

In the Agile process, in addition to a primary work type, there are also teams. At minimum, every organization has at least one team and every team has its own sprint (in which progress against any work item is tracked). Some Agile organizations prefer to map multiple teams to a single release, which means that each team would have its own series of sprints in which progress against any work item that is tracked.

For more information, see the following topics:

- [Planning \[page 44\]](#)
- [Products \[page 45\]](#)
- [Releases \[page 46\]](#)
- [Sprints \[page 49\]](#)
- [Teams \[page 54\]](#)

Planning

Planning is all about getting ready for the next step in the Agile process. Product planning identifies the features needed for upcoming releases and helps determine what is in (or not in) the product roadmap. Release planning prepares the Agile team (or a group of Agile teams) for a series of upcoming sprints. Sprint planning prepares an Agile team for the work that is to be done by them during each day in an upcoming sprint. Backlogs are the location where a work item is tracked and managed during every phase of the Agile process.

Serena Agile On Demand includes two out-of-the-box views that can be used for planning. The **Planning** tab features two side-by-side backlogs, while the **Multi Planning** tab

features a primary backlog side-by-side with two backlogs. These backlogs can be used for product, release, and sprint planning. Once a specific backlog has been chosen, the same basic collection of actions are available: add a work item, edit a work item, edit a work item (directly in the grid), view as table, list, or tree, and viewing work item properties. A work item can be selected, and then moved to other backlogs using drag-and-drop.

Multi Planning

Product Owner Storyboard

it 1 ▾

Edit

Add

More ▾

	Priority	Estimated Effort	Remaining Effort
ory management		13	0
story from tem	1	13	0
ie Tests			
ient			
urance			
ent		5	0
atus	3	5	0
ie Tests			
ient			
urance			
3		5	0
3SL	4	5	0

Teams

Commerce ▾

Ec

Name	Prio
Commission tracking for Partners and Affiliates	
Set payout schedule	2
View revenue source for commission sales	1
Product reviews	
Customer writes a review for a product	3
Total	

Teams

Platform ▾

Ec

Name	Priority
Commission tracking for Partners and Affiliates	
View commissions on	2

Products

Products contain one or more releases, into which a work item with high priority and high business value is moved. A product roadmap is used to outline what will be done over the next 2-4 releases and it helps determine what will be moved into the release backlog.

For more information, see the following topics:

- [Product Planning \[page 45\]](#)
- [Roadmap Planning \[page 46\]](#)

Product Planning

Product planning is a way to help your team (and other stakeholders) determine what will be included in future releases. Product planning should identify key business goals, should outline the high-level features that provide the most business value and have the highest priority, and should provide visibility into the project for all stakeholders, including executive sponsors, external teams (such as support, sales, or marketing), and team members.

Product planning is not meant to be exhaustive. Nor is it meant to be anti-Agile (by preventing team members from making the right decisions at the release and sprint levels). Some organizations need to be able to place the value of a product into other contexts, such as a budget or in comparison to other Agile teams within the organization.

Planning

BacklogPlanningMulti PlanningProduct Owner Storyboard

atformPlatform - Sprint 1 ▾

EditAdd ▾

More ▾

Name	Priority	Estimated Effort	Remaining Effort
Integrated inventory management		13	0
<div>Manage inventory from in-house system</div>	1	13	0
Acceptance Tests			
Development			
Quality Assurance			
Order management		5	0
<div>View order status</div>	3	5	0
Secure shopping		5	0
<div>Login using SSL</div>	4	5	0

TeamsCommerce ▾

Name
Commission tracking fo Partners and Affiliates
Set payout schedule
View revenue source commission sales
Product reviews
Customer writes a re a product

Roadmap Planning

A product roadmap is a forward-looking overview of a product backlog. The purpose of a product roadmap is to describe the features that will be delivered in the next 2-4 releases. Use product roadmap planning to help determine which releases to target for specific feature enhancements.

Releases

Releases contain one or more sprints. As each upcoming sprint is planned for, well-written stories will be moved into the sprint backlog. As each sprint is completed, a review meeting is held where the successes and failures of the current sprint are openly discussed among team members and the new and/or improved features are demonstrated to the team and other product stakeholders. After all sprints in a release are completed, actual progress is compared to expected progress (as outlined in the product roadmap).

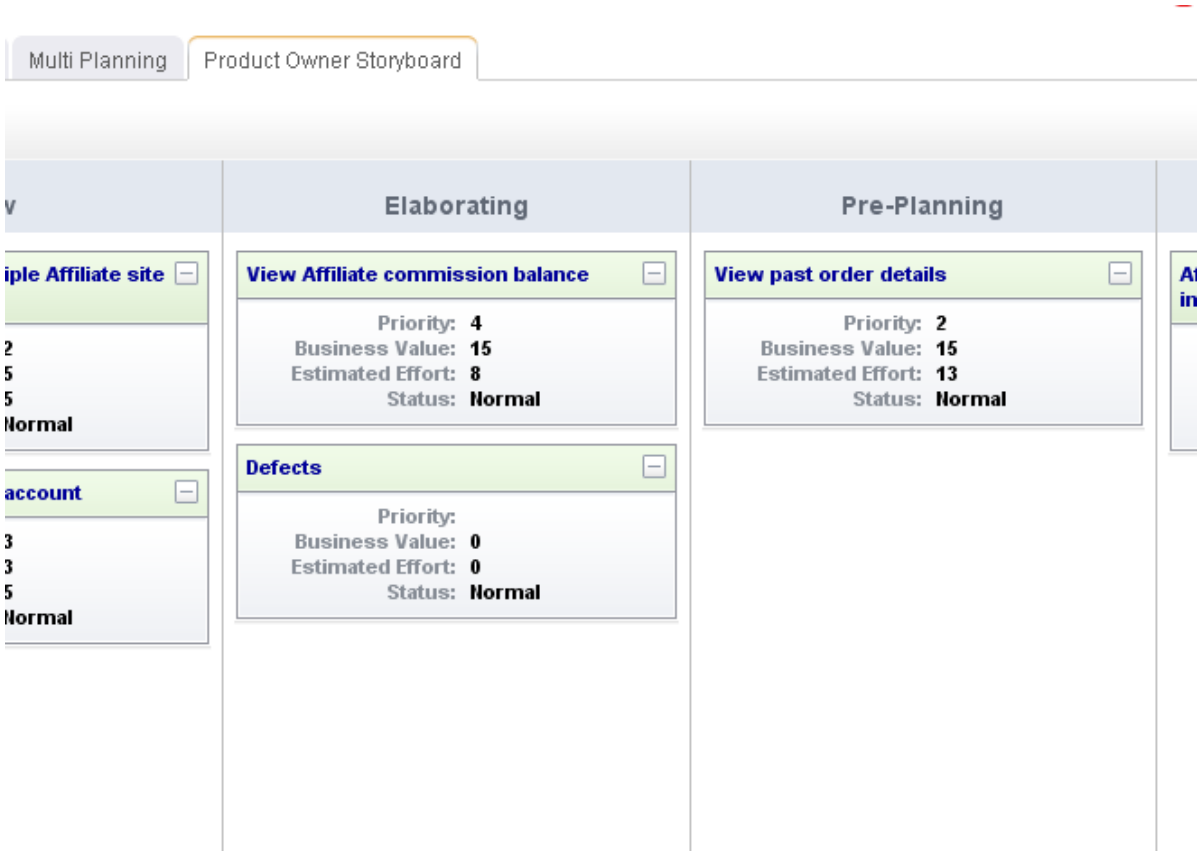
For more information, see the following topics:

- [Release Planning \[page 47\]](#)
- [Release Status \[page 47\]](#)
- [Release Burndown \[page 48\]](#)

Release Planning

Release planning is an exercise of finding out which features that are defined in the product backlog will help the team meet its current release objectives, as defined by the product roadmap. In general, product owners use this view to manage the epics--a collection of stories that are too big for a single sprint--that the development team will work on during the release. Epics (and their related stories) can be grouped by themes, priority, and so on.

Product owners should work to ensure that a release aligns with the overall project's goals and business value. They will determine the release schedule (the number and frequency of releases), themes for the release, epics that support the themes, and the length of the sprints contained with the releases. In general, shorter releases require shorter sprints. Sprint lengths range from 1-4 weeks, and are usually on the smaller end of that range. A release plan should always be visible to team members.



Release Status

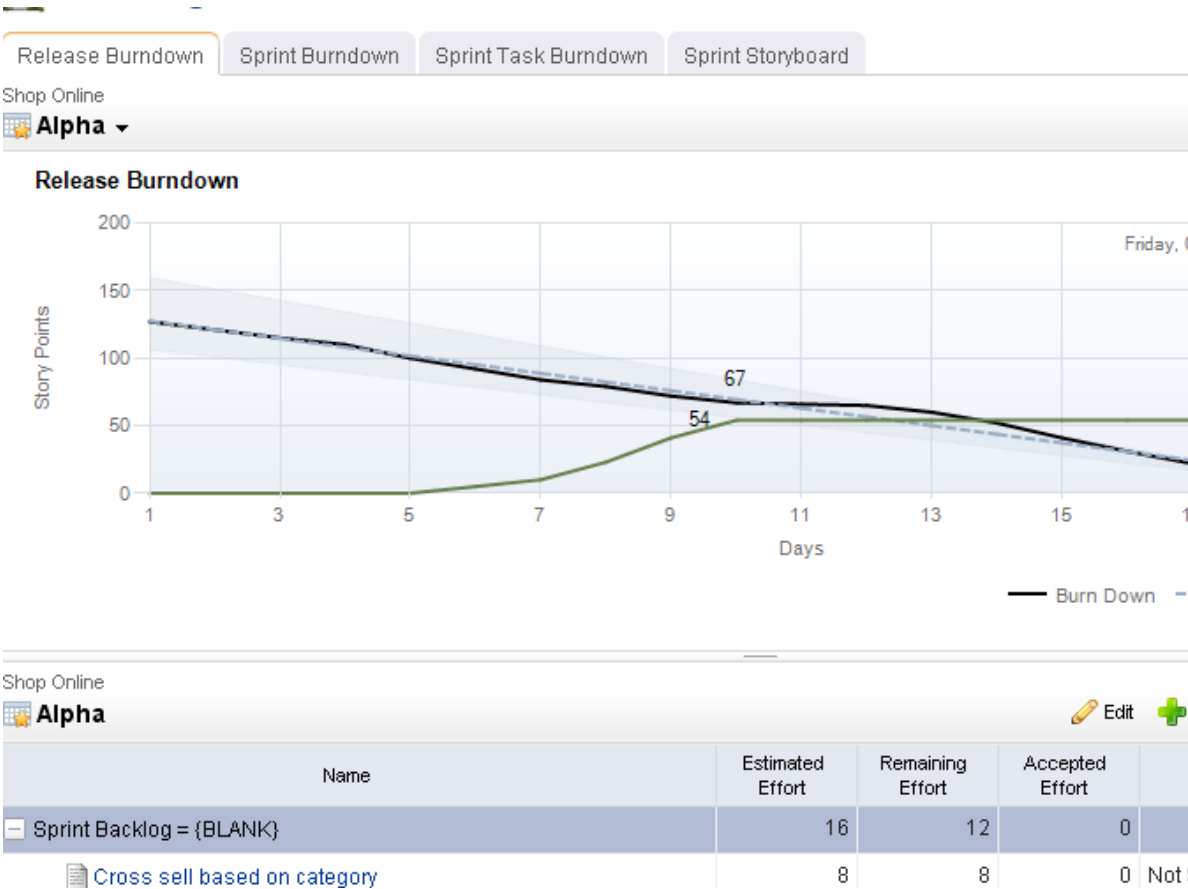
A release status meeting gives all team members (and other stakeholders) visibility into the current status of any given release. You can use a release burndown chart to help show the progress of the release, view the distribution of work item objectives as they relate to story points, and view a team's historical velocity.

Release Burndown

A burndown chart is a simple way of measuring a team's progress during a sprint by comparing the working days in the sprint to the total number of story points to which the team committed. A story is considered complete when it has zero story points remaining and has been accepted by the product owner. A sprint can be considered complete when the total story points to which the team committed reaches zero. Ideally, this occurs on the last working day of the sprint. Working days in a sprint are defined by the working days in your organization's company calendar.

A burndown chart can be useful at several points within the Agile lifecycle: during a release, during a sprint, and for a specific task. A release burndown chart is useful for tracking the progress of a release by using a single metric (such as total story points remaining or total work hours remaining) and comparing it against the original total toward which the team has made a commitment. As team members update this metric for any individual work item they are assigned, the release burndown chart is updated to show the overall progress of the team.

Serena Agile On Demand includes an out-of-the-box release burndown chart as part of the **Tracking** module. The release burndown chart is used to view the current status of the release, sorted by sprint in the related backlog pane. An out-of-the-box burndown chart will show the backlog from which the burndown chart is based as part of the release, sprint, and task burndown chart views.



Sprints

A sprint is where all of the actual work happens. Every day, team members gather in daily standup and quickly state what they have done, what they are going to do, and whether they have any impediments. Sprints rely on a team's velocity to determine how much work can be done in a future sprint and on a team's burndown chart to gauge how well a team is completing its work in a current sprint.

The primary goal of a sprint is to add a new piece of shipping software to an application. This could be one or more new features, a small collection of improvements (fixed defects), and so on, as long as the completed (and accepted) work results in something of actual value for a customer.

For more information, see the following topics:

- [Sprint Planning \[page 49\]](#)
- [Sprint Burndown \[page 51\]](#)
- [Daily Standup \[page 52\]](#)
- [Sprint Review \[page 54\]](#)

Sprint Planning

Sprint planning is used to define the list of stories that a team will commit to building during a single sprint for a given release. Story points are assigned using the team's velocity as a guideline for determining how many story points can be committed to for a single sprint. This view is similar to the release planning view, but is targeted at the sprint level.

Planning Poker

Planning poker is a method of estimating the sizes of user stories during sprint and release planning meetings. Team members discuss a user story for a short period of time, after which team members assign that user story a points estimate. This is often done using Fibonacci numbers (1, 2, 3, 5, 8, 13, and so on), where the lower numbers are easier to work on. The team members with the highest and lowest estimates defend their positions, after which team members re-assign that user story a points estimate.



The purpose of planning poker is to achieve a consensus among the team as to the relative sizing for all user stories that are candidates to be moved into a sprint backlog or to be worked on during any single sprint. The user story sizing estimates help product owners select the user stories with the highest business value.

User story size estimates are intended to show how much effort is required in order to complete the work on an individual user story. In general, user stories assigned a 1, 2, or 3 are user stories that can be completed in a single two week sprint by two or fewer team members. User stories assigned a 5 or an 8 are more difficult, may require many team members, may have dependencies on other user stories, or may be too big to complete during a single sprint. Some user stories with a 5 or an 8 sizing estimate should be broken down into smaller user stories. User stories assigned a 13 (or greater) are almost always

too large to be worked on during a single sprint and should be broken down by product owners into smaller user stories.

That said, there should be no literal meaning associated with any particular number in the Fibonacci sequence other than the meaning your team learns to associate with them over time. Some teams use standard playing cards, with an Ace representing a 1 and a King representing a 13.

Velocity

Velocity is a method of determining how many story points of work a team can commit to in a future sprint based on how many story points of work a team was able to complete in previous sprints. As a safe, general rule, a team should never commit to more story points in a sprint than their average velocity over the 2-4 previous sprints.

But velocity is more than a simple math exercise. There are good velocities. And there are bad velocities. How do you know one from the other? Some characteristics of a good velocity:

- Story points are measured independently of the size of the team.
- Story points are sized to include all of the business priorities and goals of the Agile project.
- Story points are sized to include dependencies on all team members.
- Story points are sized to account for dependencies on external teams, such as support, sales, or training.

Most characteristics of a bad velocity are simply the opposite of a good velocity, such as committing to a number of story points that is only based on the number of team members available during the sprint. Or not factoring the potential complexity of a new series of features as they relate to the amount of time your support organization will need to be ready for the upcoming product release, the amount of time it will take your sales team to learn how to successfully engage potential customers, or by not accounting for the amount of time it may take a training team (or a documentation team) to produce customer-facing material.

Good velocity? Bad velocity? The reality is that most Agile teams consistently live somewhere in-between. Business priorities change. Challenging defects are discovered. Team members get sick. External dependencies can be hard to predict. But a little strategy can go a long way. Your team's velocity is important. So it's equally important to consider your velocity within the context of the work that your team is doing and how it relates to your product's release cycle, your team's relationship to other teams, and so on. For example, a bad idea might be to switch your automated testing platform four times in one calendar year. Every time you change platforms, you may be removing valuable points from your velocity. Another way a little strategy can help is for the product owner to have a good idea of what the product roadmap looks like in relation to the work the team will be asked to do during the upcoming release. For example, if one feature enhancement requires your engineering team to reconfigure the back-end, it's probably better to do that work earlier in the release cycle rather than later.

A good velocity helps your team deliver as much value as possible. A good velocity is what your team wants. Your team will need to work hard to learn what its good velocity looks like. Sometimes the old adage "do less to do more" can help a team understand what their velocity should be. If your team finds itself consistently underperforming its story point commitments (even by a point or two, per sprint), or if your team finds itself consistently finishing stories on the very last day of the sprint, right before the sprint

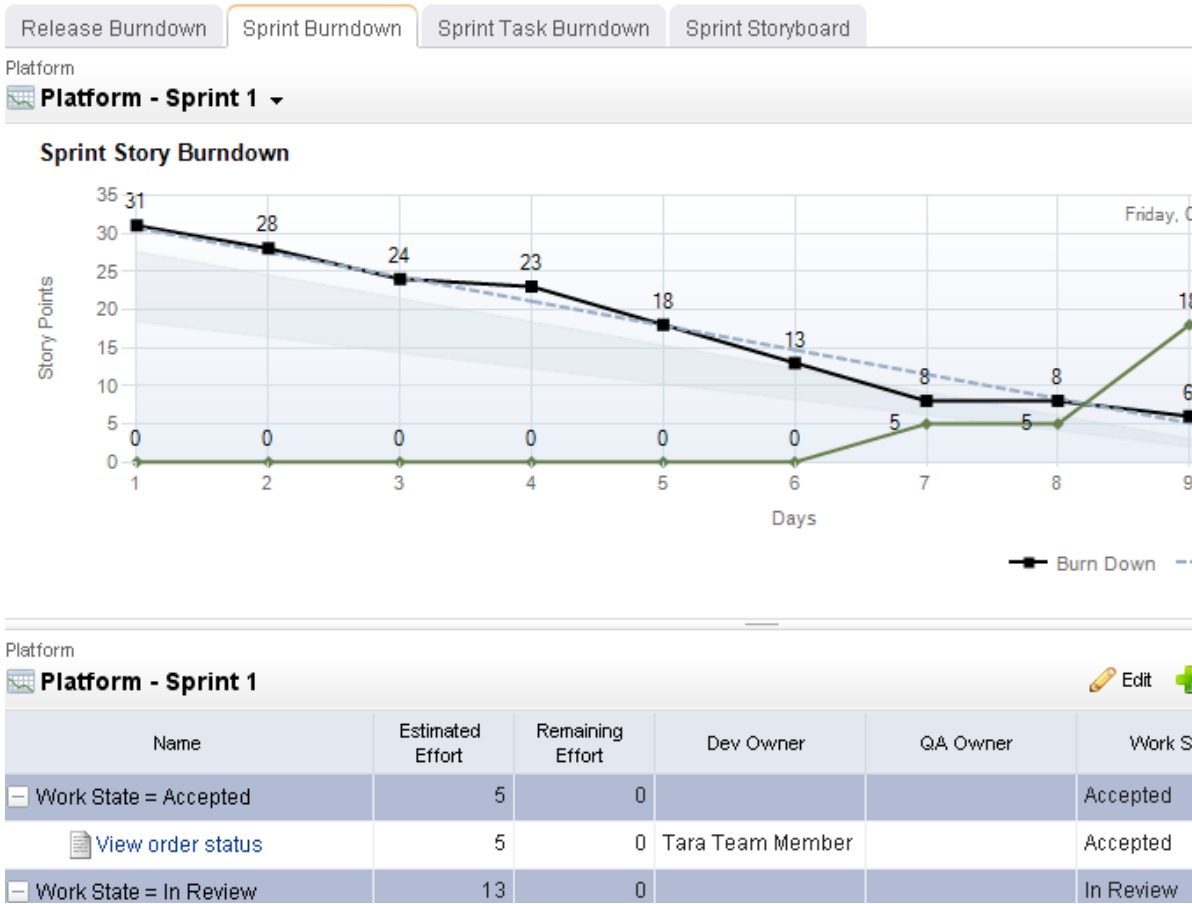
review, then your team should consider committing to fewer story points. Over the next 2-4 sprints, this will lower your team's velocity, but it will also give your team a chance to see if a smaller commitment translates into a more successful sprint.

Sprint Burndown

A burndown chart is a simple way of measuring a team's progress during a sprint by comparing the working days in the sprint to the total number of story points to which the team committed.

A story is considered complete when it does not have any remaining story points and after it has been accepted by a product owner. A sprint can be considered complete when the total story points to which the team committed reaches zero or when the time allotted to the sprint (1-4 weeks) runs out. Ideally, this occurs on the last working day of the sprint. Stories not completed in time are not accepted by the product owner and are moved to a subsequent sprint. Working days in a sprint are defined by the working days in your organization's company calendar.

Serena Agile On Demand includes an out-of-the-box sprint burndown chart as part of the **Tracking** module. The sprint burndown chart is used to view the current status of the sprint. The list of stories, sorted by work state will appear in the related backlog pane. An out-of-the-box burndown chart will show the backlog from which the burndown chart is based as part of the release, sprint, and task burndown chart views.



Daily Standup

Daily standup occurs every day at a time that is convenient for all team members--usually in the morning--and often time-boxed at no more than 15 minutes. A burndown chart is used to view the team's overall status. The list of stories that are being worked on in the current sprint are viewed alongside a list of impediments (if there are any impediments). During standup, each team member addresses three key issues: what they have worked on since the previous daily standup, what they will work on today, and what impediments (if any) are present that could affect their current work item.

Before arriving at standup, team members should update any user stories with current points remaining. This will ensure that the burndown chart used in the daily standup accurately reflects the current status of the team.

Daily standup is intended to be a quick meeting that benefits the entire team. If design discussions or other issues are raised that cannot be handled during standup, many Agile teams quickly take those conversations offline.

For more information, see the following topics:

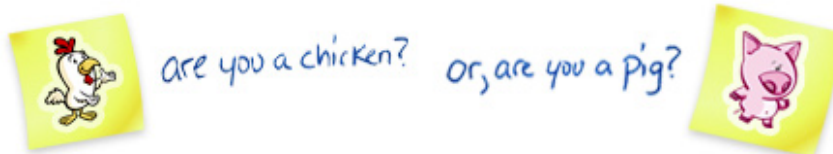
- [Chickens and Pigs \[page 52\]](#)
- [Task Burndown \[page 53\]](#)

Chickens and Pigs

There is a useful parable from the early days of SCRUM ([credited to Ken Schwaber](#)) that organizes the people involved in Agile software development into two roles: chickens and pigs. It goes like this:

A pig and a chicken are walking down a road. The chicken looks at the pig and says, "Hey, why don't we open a restaurant?" The pig looks back at the chicken and says, "Good idea, what do you want to call it?" The chicken thinks about it and says, "Why don't we call it 'Ham and Eggs'?" "I don't think so," says the pig, "I'd be committed but you'd only be involved."

The point is that pigs are the ones involved who write, deliver, test, and document software, while the chickens are interested in the outcome but aren't directly doing the same things as pigs. The needs, desires, ideas and influences of the chickens are important and taken into account, but not in a way that would prevent the completion of the project by the pigs.



Pigs are the ones committed to the project, the ones with "their bacon on the line." They comprise the Agile or SCRUM team. They have the responsibility to deliver the product and may consist of any number of members with cross-functional skills to do the actual work. pigs on the team include: developers, designers, quality assurance, testers, product owners and facilitators or scrum masters.

Chicken roles are those roles in the project that are not part of the actual Agile development process, but must be taken into account. An important aspect of an Agile approach is the practice of involving users, business and stakeholders into part of the process. It is important for these people to be engaged and provide feedback to the team

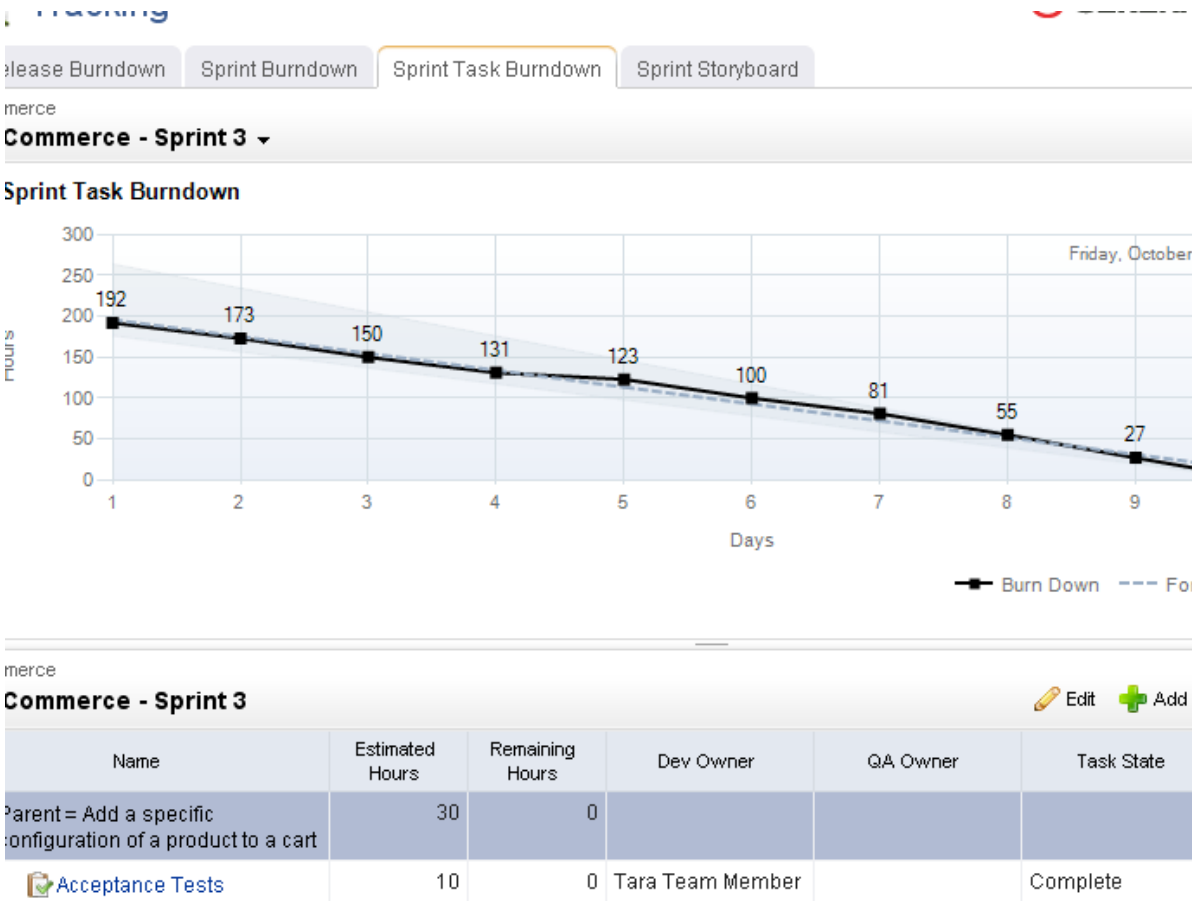
to assist in reviewing and planning the work. Those people are termed chickens and represent users, stakeholders, managers, operations, customers and vendors of the software that’s produced at the end of the project.

Task Burndown

A burndown chart is a simple way of measuring a team's progress during a sprint by comparing the working days in the sprint to the total number of story points to which the team committed.

A story is considered complete when it does not have any remaining story points and after it has been accepted by a product owner. A sprint can be considered complete when the total story points to which the team committed reaches zero or when the time allotted to the sprint (1-4 weeks) runs out. Ideally, this occurs on the last working day of the sprint. Stories not completed in time are not accepted by the product owner and are moved to a subsequent sprint. Working days in a sprint are defined by the working days in your organization's company calendar.

Serena Agile On Demand includes an out-of-the-box task burndown chart as part of the **Tracking** module. The task burndown chart is used to view the daily progress of a team while the sprint progresses. The list of tasks, sorted by parent story will appear in the related backlog pane. An out-of-the-box burndown chart will show the backlog from which the burndown chart is based as part of the release, sprint, and task burndown chart views.



Sprint Review

A review meeting (or retrospective) should occur at the end of every sprint and at the end of every release. A review gives team members (and other stakeholders) to give each other honest feedback about how well the sprint or review was (or was not) executed. The purpose of the review is to identify areas of improvement, identify successes and failures, and to learn and grow as a team so that it can improve its performance in future sprints.

Sprint reviews are often paired with a sprint demo, where individual team members show what was done during the sprint to other team members and external stakeholders. The usually occurs immediately before or after the review meeting.

Teams

In an Agile environment, resource management concepts--demand, velocity, commitment, and acceptance--are focused more on teams than on individuals. An Agile team is defined as "all of the team members who commit to all of the work required to complete a single story during a single sprint, including all tasks and dependencies that are related to that story." A team should only commit to working on stories that have a high priority and a high business value. And a team should use its velocity to determine how many stories to which it can commit in an upcoming sprint.

- A sprint assignment is the process of moving a story into a sprint backlog from a release backlog or a team backlog.
- A team assignment is the process of moving a story into a team backlog from a release backlog.

Teams frequently commit to more than one story per sprint, but it is important to understand that the effort required to complete the work required by a single story (including all of its related tasks and dependencies) is done in a single sprint by a single Agile team. Some assignments (like tasks) are identified before the sprint begins, while others (like defects and impediments) are discovered during the sprint. Assignments, once completed, are submitted to the team (for review) and to the product owner (for acceptance).

An Agile team is supposed to be small. This is by design. Good Agile teams share many of the following traits:

- Have 7 or fewer team members
- Are self-organizing
- Have complimentary skills
- Have collective knowledge
- Work well together
- Are cross-functional
- Are co-located (as much as possible)
- Frequently stay together in subsequent sprints

At a minimum, the relationships between product owners, product backlogs, and teams is 1:1 (meaning there is a single product owner who manages a single product backlog; the single product owner assigns a work item from the single product backlog to a single Agile team. There can, of course, be many more combinations than that.

Storyboard

A storyboard (or card wall) can be used to help track the work item status during a sprint. For example, a storyboard could have the following phases:

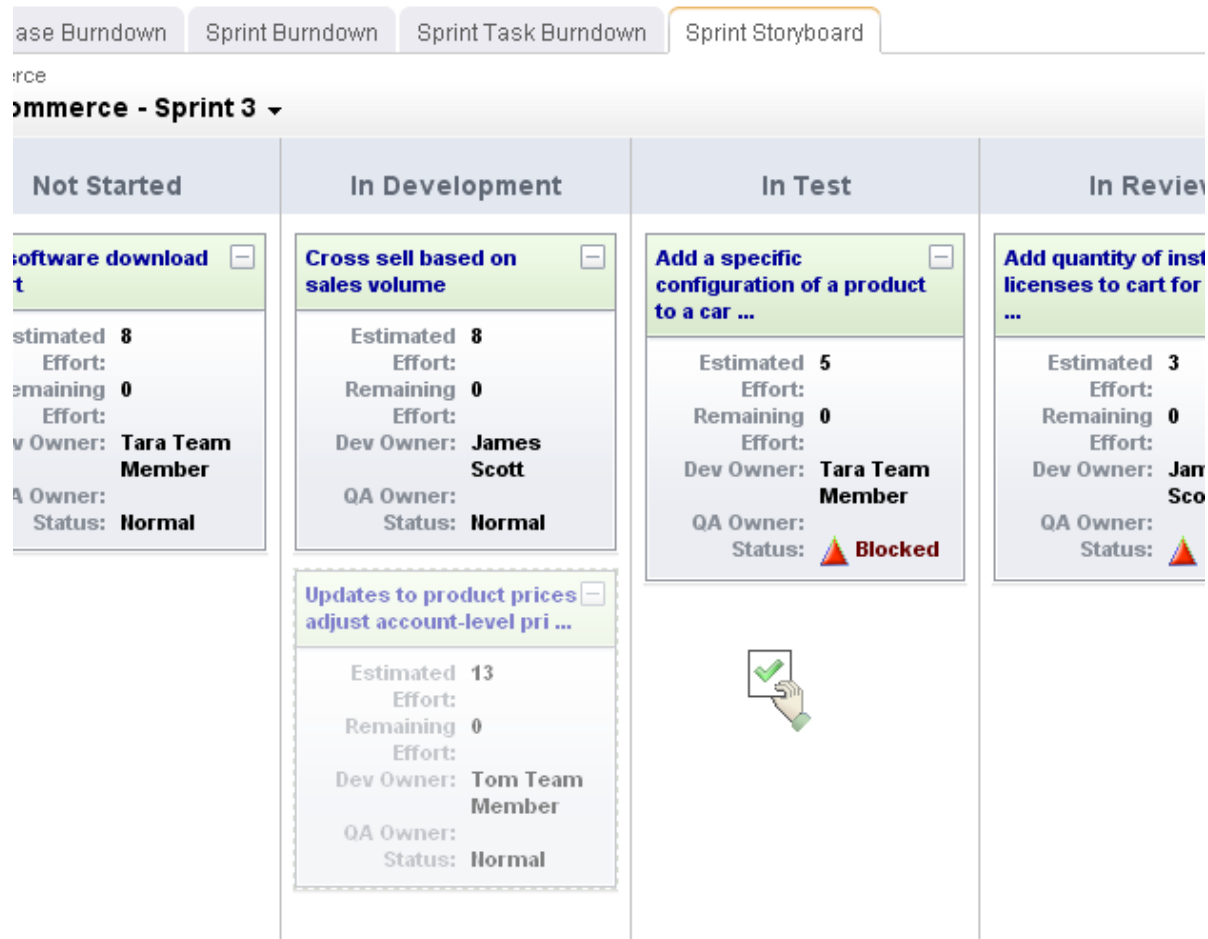
- **Not Started** A work item that is ready to be worked on by a team member.
- **In Development** A work item that is being worked on by a team member.
- **In Testing** A work item that is ready to be tested by a team member.
- **Testing** A work item that is being tested by a team member.
- **Ready for Review** A work item that is considered done by the team, but is not yet approved by the product owner.
- **Accepted** A work item that is accepted by the product owner and is considered complete.

While working in a storyboard, you can drag any work item from one column to another. Click the plus symbol to view quick details, such as name, work (estimated and remaining), and status. Click the name of any story to view its details, such as its name, description, acceptance criteria, work (estimated and remaining), status, priority, owners (development, test, and product), notes, and so on.

Serena Agile On Demand includes two out-of-the-box storyboards, one for use by product owners as part of their planning activities, and one for use by teams as part of their sprint activities.

- **Product Owner Storyboard** This storyboard has phases for **New**, **Elaborating**, **Pre-Planning**, and **Sprint Ready**.
- **Sprint Storyboard** This storyboard has phases for **Not Started**, **In Development**, **In Test**, **In Review**, and **Accepted**.

Once a specific backlog has been chosen, the same basic collection of actions are available: edit a work item and view a work item. A work item can be selected, and then moved to other phases in the storyboard using drag-and-drop.



Backlogs

A backlog is a queue that contains all of the potential work item that could be built, including actual work, proposed features, good ideas, or discovered defects. The work item in a backlog should cover the entire product's lifecycle, from the current release (and the current sprint) to future releases (and future sprints). All work item in a backlog can be viewed as an ordered list (sorted by rank), in a table, or by in a tree (grouped as a parent or child work item, as defined by your organization's work breakdown structure).

In terms of the overall scope of work, a release backlog should contain a more defined amount of work than a product backlog (usually most of the work that is believed to be necessary for a specific release) and a sprint backlog should only the work that will be done during the sprint. As work item is moved into a smaller backlog it should decrease in size (for example, story point sizes should decrease), but they should also increase in detail (for example, better acceptance criteria and/or technical notes provided in the stories and/or clear tasks defined).

Any team member may add a work item to the product backlog; however, only product owners should remove a work item (from any backlog) or move a work item into a release or a sprint backlog. This determination may be based on what is outlined in the product roadmap, comparing the priorities of one work item to another, the business value each work item will provide, a team's velocity, and so on. It is important for team members to have visibility into what is contained in a release or a sprint backlog. Therefore, a work

item should not be added to a release or a sprint backlog until after it has been discussed with team members during a release or a sprint planning meeting.

Serena Agile On Demand includes several out-of-the-box backlogs, one for use by team members to view any work item to which they have been assigned, one for use by product owners as part of their planning activities, and the entire backlog hierarchy.

- **My Work** This backlog is used primarily by team members to view any work item that has been assigned to them for work during the current sprint.
- **Planning** This backlog contains every work item that is in the current product backlog, current release backlog, or current sprint backlog.
- **Backlogs** The Backlogs module provides access to the entire work hierarchy, including past, present, and future products, releases, sprints, and teams.

An out-of-the-box burndown chart will show the backlog from which the burndown chart is based as part of the release, sprint, and task burndown chart views.

Backlog Planning Multi Planning Product Owner Storyboard				
products				
Shop Online				
Save Edit				
Name	Estimated Effort	Remaining Effort	Work State	
Commission tracking for Partners and Affiliates				Norm
Cross selling			Not Started	
Defects	0	0	Not Started	Norm
Defect 10156				Norm
Order management	13	13		Norm
View past order details	13	13	Not Started	Norm
Partner & Affiliate tools	23	23		Norm
Affiliate manages their account information	5	5	Not Started	Norm
Sign up for an Affiliate account	5	5	Not Started	Norm
User can register multiple Affiliate site URLs in their company profile	5	5	Not Started	Norm
View Affiliate commission balance	8	8	Not Started	Norm

For more information, see the following topics:

- [Product Backlog \[page 58\]](#)
- [Release Backlog \[page 58\]](#)
- [Sprint Backlog \[page 58\]](#)
- [Team Backlog \[page 58\]](#)

Product Backlog

A work item is added to the product backlog by product owners and team members. A work item is moved into a release backlog (from the product backlog) to support the goals outlined in the product roadmap. A work item in a product backlog should be estimated (at a very high-level), broken down into a smaller work item (with some detail), and so on, before the beginning of the next release.

Product planning meetings may include team members, but they often include high-level stakeholders who are not team members, such as executive sponsors, members of other teams within your organization (support, documentation, marketing, and so on), as needed. The goal of product planning is to make sure that your product roadmap contains only a work item with the highest business value and priority for the upcoming 2-4 releases.

Release Backlog

A release backlog should only contain a work item that could be committed to by a team for work in a sprint. A work item can be added to the release backlog from the product backlog. A work item in a release backlog should be discussed with team members during release planning meetings. A work item should be estimated, broken down into a smaller work item, become more detailed, and so on, before the beginning of the next sprint.

A work item can be moved between a product and a release backlog as needed, such as when business priorities change or when opportunities to create better business value arise. A work item in a release backlog can be added, edited, and removed; however, any work item in a release backlog should have a high priority and a high business value. In general, only well-defined stories should be moved into a sprint backlog from a release backlog.

Sprint Backlog

Use a sprint planning meeting to determine which stories will be committed to during a given sprint. A sprint backlog should only contain stories that the development team has committed to for that sprint. Stories in a sprint backlog should be well-written, have a high priority and a high business value, and should have an accurate story point estimate.

Unlike a product or a release backlog, a sprint backlog should not change once it has been committed to by a development team. A product owner should not add or delete any stories and should only edit a user story after discussing the proposed changes with any affected team members. Any work item in a sprint backlog should have assigned owners.

Team Backlog

Use release planning and sprint planning meetings to determine which stories should be moved into a specific Agile team's backlog. A team backlog should contain stories that will be committed to by a specific Agile team for an upcoming sprint. Stories in a team backlog should be well-written, have a high priority and a high business value. Stories in a team backlog should have an accurate story point estimate before being moved into a specific sprint backlog.

A work item in a team backlog can be moved to and from a release backlog (or another team's backlog) as needed, such as when business priorities change or when opportunities to create better business value arise. A work item in a team backlog can be added, edited, and removed as needed; however, any work item in a team backlog should have a high priority and a high business value.

Work Items

A work item is anything that is used to build and track work during any phase of a product's lifecycle, including high-level features (epics), a more detailed work item (such as a story and its individual tasks), issues raised by customers or members of your test team (defects), and issues that prevent team members from completing their assignments (impediments).

In general, a work item lives in backlogs (product, release, and sprint). As a work item move into a smaller backlogs they should decrease in size, but also increase in detail. A work item is configurable and can have many different names. Their relationships (to each other) are defined by your organization's work breakdown structure.

Serena Agile On Demand uses epics, stories, tasks, and defects. In general, an epic is the largest work item. Epics should broken down into well-defined stories (which then contain specific tasks). Defects are like stories (in that they should be well-defined and that they may contain specific tasks). An impediment is the final work type. In general, impediments can be resolved quickly; should your organization need to create impediments that require actual work by actual team members, you should add a user story into a backlog that is used by the team that will do the work that is needed before the impediment can be removed.

For more information, see the following topics:

- [Epics \[page 59\]](#)
- [Stories \[page 59\]](#)
- [Tasks \[page 60\]](#)
- [Defects \[page 60\]](#)
- [Impediments \[page 60\]](#)

Epics

An epic is a very large work item that cannot be worked on by the team during any single sprint. It must be broken down into a smaller work item (stories) before it can be discussed in a planning meeting and before any related work is moved into a release or sprint backlog.

Epics represent how your organization plans to deliver business value at the product level. Epics often map to key features outlined in the product roadmap (what your team plans to deliver over the next 2-4 releases). Sometimes an epic itself is used to represent a feature that is worked on during a single release. Epics are discussed during product planning and are broken down into smaller collections before being moved into release planning. In the product backlog, epics can be grouped by major themes, such as automation, user interface, documentation, and so on.

Stories

A well-written story is one of the most critical elements of Agile. A well-written story has the following traits:

- It has high business value
- It is specific and of a small size; sizing takes into account all work related to that story done by all team members

- It can be discussed by team members during planning meetings clearly, succinctly, and independently of other user stories
- Test cases can be easily defined and the story can be tested thoroughly (and fixed, if required) during the same sprint

So what about a story with those traits? What does it mean to have a high business value? What does it mean to be "of a small size?" How do you know if you can actually talk about a story during a planning meeting when it's time boxed at 5 minutes of discussion? Can every team/person test the same-sized user story in the same way?

The fact is that even when a group of stories have similar traits, no story is the same. In general, your team should only work on stories that have high business value, which means that your team should only work on the stories that are the most requested by your customers, the most needed to improve your application's front-end and back-end performance, the ones that make your application's user interface more usable, and the ones that can be delivered with high quality in a reasonable amount of time.

Your team should apply what you learned while working on stories in previous sprints--success and failure--to the stories your team is working on now. Some examples. If your team is spending too much time discussing stories in planning meetings, the stories need to be more specific and smaller. If your team cannot complete testing user stories thoroughly during the same sprint, the stories need to be more specific and smaller. If your training team's velocity cannot keep up with the engineering team's velocity, you should re-size your stories so that the training team's velocity is factored in better with the rest of the team's velocity, you could minimize the overall scope of training so that the amount of training produced is time-boxed by the length of the sprint, or you could track the training team's velocity separately from the team (or not track it at all).

Tasks

A task is any work item that has a single objective and resolution.

Most well-defined Agile stories are simply a collection of tasks.

Defects

A defect is a bug, an issue, or some problem with the quality of the product. Defects can be identified by customers, by members of your sales or support organizations, and (most often) by members of your own team (testers and engineers).

Many defects can be fixed easily (often during the same sprint in which they were discovered) and do not need to be tracked as a work item. Some defects require visibility (such as ones raised by customers or support) and need to be tracked as a work item (for visibility). Some defects are complex and may require research by team members or significant work by engineering (and follow-up testing to ensure the defect is fixed) or work by an external team. Any work item that affects a team's overall velocity should be tracked as a work item so that fixing those kinds of defects is factored into the team's overall velocity.

Impediments

An impediment is an issue, a problem, or anything that is preventing a team member from being able to complete work on a story and/or task. Impediments are often discussed during standup by team members.

It's often helpful to think of impediments in relation to business value. For example, your team only commits to a work item with the highest business value. Anything that is

blocking the completion of a work item may prevent your team from delivering business value. It is the job of the scrum master to help facilitate a resolution to the impediment. Some impediments are solved quickly and easily, while others may require the creation of new work item as part of the resolution.

Actions

Working in an Agile project requires working in backlogs, updating a work item, managing collections of projects, resources, sprints, and teams, and so on.

For more information, see the following topics:



- [Backlogs \[page 61\]](#)
- [Guidance \[page 69\]](#)
- [Projects \[page 70\]](#)
- [Work Items \[page 72\]](#)
- [Work Types \[page 79\]](#)

Backlogs

A backlog is a queue that contains all of the potential work item that could be built, including actual work, proposed features, good ideas, or discovered defects. The work item in a backlog should cover the entire product's lifecycle, from the current release (and the current sprint) to future releases (and future sprints). All work item in a backlog can be viewed as an ordered list (sorted by rank), in a table, or by in a tree (grouped as a parent or child work item, as defined by your organization's work breakdown structure).

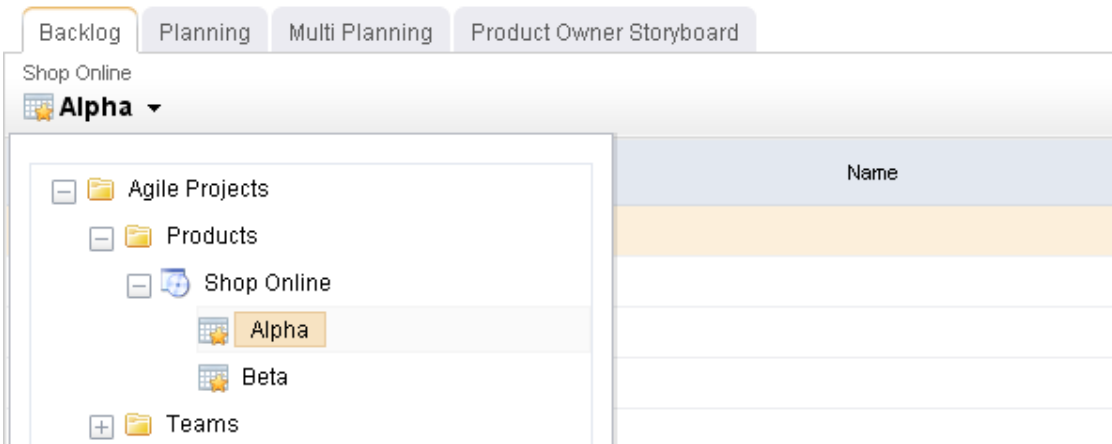
A backlogs is the places in which a work item is managed, be it an epic, a story, a defect, a task, or a custom work item.


Edit work item



You can edit a work item directly in a backlog. Click  Edit, make your changes, and then click  Save.

To edit work a work item directly in a backlog

1. Choose a backlog.



2. From the backlog toolbar, select  Edit.

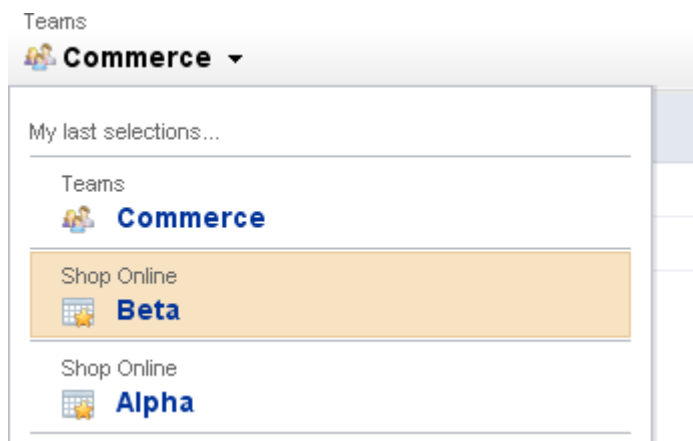
3. Make your changes.
4. Click  Save. (To exit without saving changes, click  Edit.)

Hide

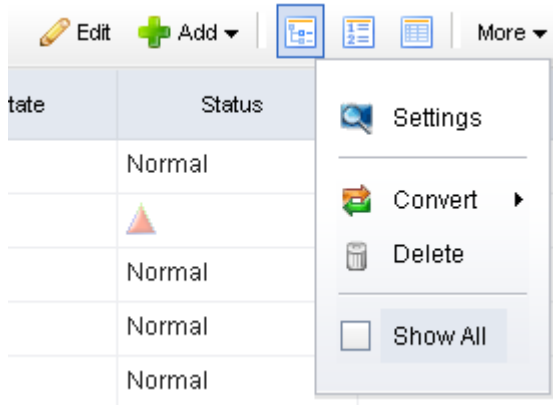
You can hide any work item that is not included in the backlog in which you are currently working.

To hide a work item

1. Choose a backlog.




2. From the backlog toolbar, select **More**.



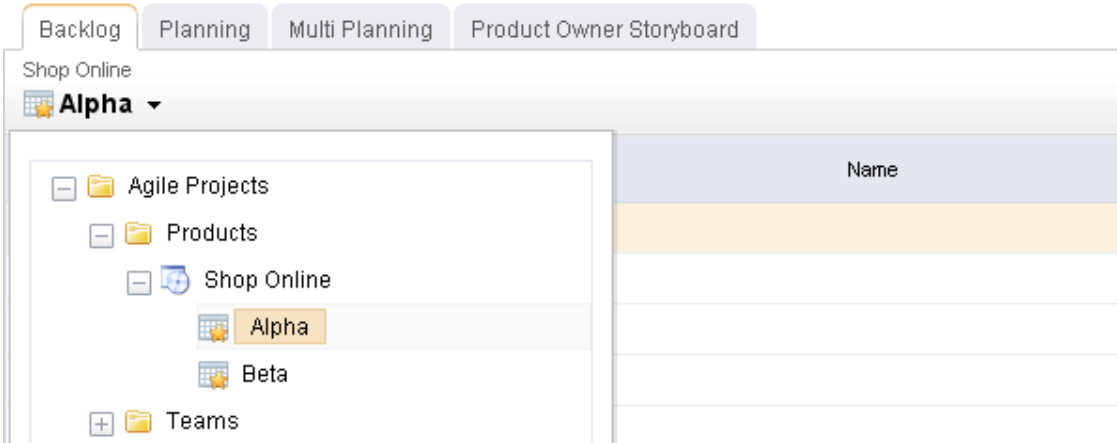
3. De-select **Show All**.

Prioritize

You can prioritize a work item (sometimes called ranking a work item) in a backlog. Viewing a backlog in list view mode will ensure that you can view a work item by relative priority (where a higher rank equals a higher priority). (By default, Agile On Demand shows backlogs in the  Tree view mode, which does not rank stories.)

To prioritize stories in a backlog

1. Choose a backlog.



- 2. Click List.
- 3. Choose the story you want to re-rank, select it (by holding down the mouse button), and then drag it to its new relative priority.

2	Cross selling	40
3	Defects	0
4	Partner & Affiliate tools	23
	Affiliate manages their account information	5
	Sign up for an Affiliate account	5
	User can register multiple Affiliate site URLs in their company profile	5

- 4. When a work item is in the location you want it to be, de-select it (by releasing the mouse button). The backlog will refresh and the work item will have been re-ranked according to its new relative priority.

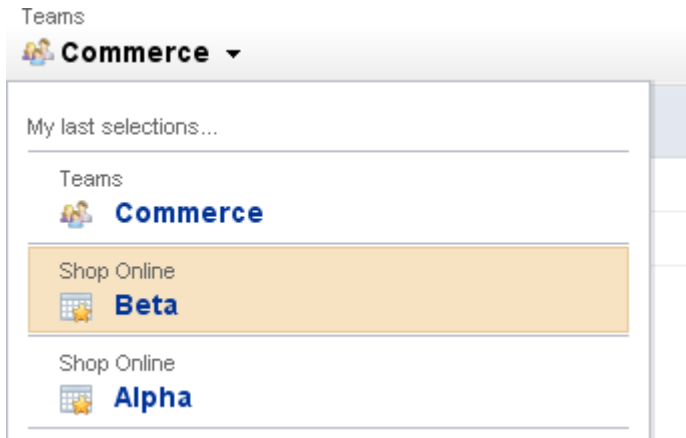
		ERROR
1	Commission tracking for Partners and Affiliates	
2	Cross selling	40
3	Partner & Affiliate tools	23
	Affiliate manages their account information	5
	Sign up for an Affiliate account	5
	User can register multiple Affiliate site URLs in their company profile	5
	View Affiliate commission balance	8
4	Defects	0
5	Integrated inventory management	0

Select backlog

You can move between backlogs by selecting a new backlog while working in any backlog.

To select a different backlog

- 1. Choose a backlog.

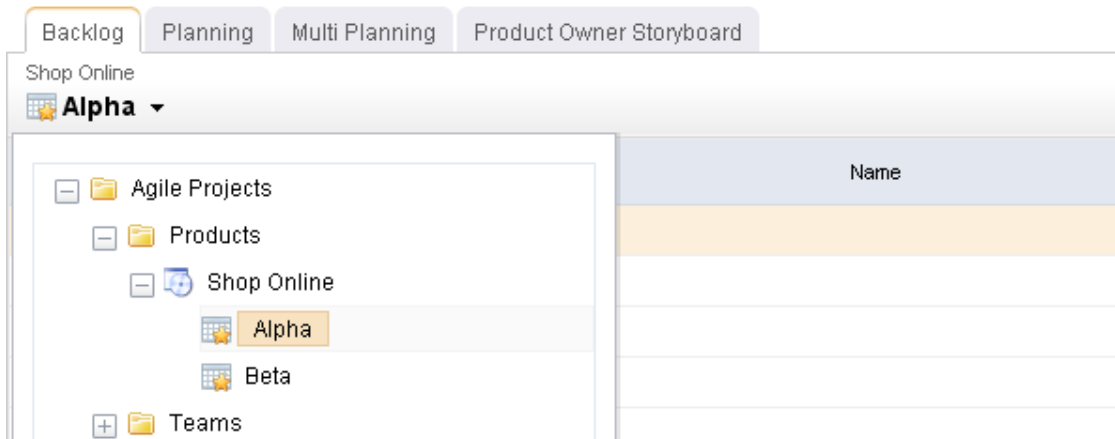


Show

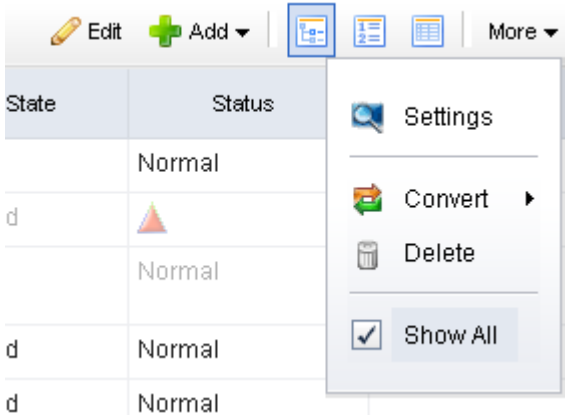
You can show every work item in the work hierarchy, including parents and children of any work item that is not being worked on in the sprint or release in which you are currently working.

To show every work item

1. Choose a backlog.



2. From the backlog toolbar, select **More**.
3. Select **Show All**.

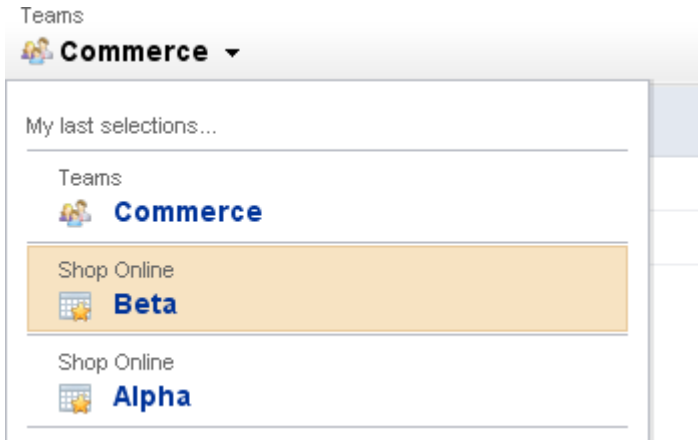


View

You can view every work item in a backlog. There are three layout options: **Table**, **List**, and **Tree**. The **Table** and **Tree** options use your organization's work breakdown structure to display the order of every work item. The **List** option displays a work item by priority.

To view a backlog

1. Choose a backlog.



2. From the backlog toolbar, select **More**, and then Table, List, or Tree.

Settings

Depending on the backlog in which you are working, the **Settings** dialog box may have one or more of the following sections.

Columns

This tab is used to define which columns appear on the datasheet, and in what order they are displayed. If you are creating or editing a datasheet that is assigned to a datasheet type, you cannot edit any of the datasheet properties on the Columns, Filters, Organize, Time Views, or Dashboard tabs:

Fields	Description
Add	Click this button to move the selected attributes from the Available Attributes box to the Selected Attributes box.
Available Attributes	The attributes that have been assigned to the work item types listed on the General tab.
Custom Header	The custom display name for the attribute, as it will appear in the datasheet. If this field is empty, the Default Header will be used.
Datasheet Name	The name of the datasheet.
Default Header	The default display name for the attribute, as it will appear in the datasheet.
Move Down	Columns are displayed from left to right in a datasheet. Click this button to move the column for this attribute to the right in the datasheet.
Move Up	Columns are displayed from left to right in a datasheet. Click this button to move the column for this attribute to the left in the datasheet.
Remove	Click this button to move the selected attributes from the Selected Attributes box to the Available Attributes box.
Selected Attributes	The attributes that are displayed as columns in the datasheet. Columns are displayed from left to right in the order listed here.

Filters

This tab is used to define which columns appear on the datasheet, and in what order they are displayed. If you are creating or editing a datasheet that is assigned to a datasheet type, you cannot edit any of the datasheet properties on the Columns, Filters, Organize, Time Views, or Dashboard tabs:

Fields	Description
Add	Click this button to move the selected attributes from the Available Attributes box to the Selected Attributes box.
And	Select this option to indicate that the work item on the datasheet must meet the conditions of the selected filter rule and all other filter rules that do not begin with Or . For example, if multiple rules use the And option, and one rule uses the Or option, the rules containing the And option are grouped together, and the rule containing the Or option is considered separately. The work item on the datasheet must either meet all of the And conditions, or at least the Or condition.

Fields	Description
Attribute	Select the datasheet column that you are building a filter rule around from this list.
Compare To	Select what the filter rule should compare the attribute to. Select the this specific value option and type a value in the box below the options to filter the datasheet so that only work item with the Comparison relationship with the value you specified for the selected attribute are displayed. Select the another attribute option and select an attribute from the list below the options to filter the datasheet so that only work item with the Comparison relationship between the two selected attributes are displayed.
Comparison	Select the test you want to apply to the column selected in the Attribute list.
Datasheet Name	The name of the datasheet.
Delete	Removes the selected rule from the Filter Rules box.
Down	Moves the selected rule down in the list.
Filter Rules	Lists all of the current rules set up to filter the datasheet.
Or	Select this option to indicate that the work item on the datasheet must meet the conditions of the selected filter rule, or all the filter rules that do not begin with Or , or another filter rule that begins with Or .
Up	Moves the selected rule up in the list.
Update	Click this button to update the selected filter rule.

General

This tab is used to identify the basic information about a datasheet. If you are creating or editing a datasheet that is assigned to a datasheet type, you cannot edit the work item types included on the datasheet type on the General tab. You cannot edit any of the datasheet properties on the Columns, Filters, Organize, Time Views, or Dashboard tabs:

Fields	Description
Associate With	You can associate the datasheet with a specific location in the work item hierarchy. This enables you to define the root work item for the datasheet; the work item you select is the top-level work item in the datasheet. By default, datasheets are associated with the enterprise portfolio.

Fields	Description
Created By	Displays the user name of the person who initially created the datasheet, and the date and time it was created. This box is read-only.
Default Expansion Level	Select the default expansion level for the datasheet from the Default Expansion Level list. The Default Expansion Level list determines how many levels of the datasheet are opened on the datasheet by default.
Description	Type a brief description of what the datasheet can be used for, or what data it includes.
Last Modified By	Displays the user name of the person who made the most recent changes to the datasheet, and the date and time they modified it. This box is read-only.
Location	Displays the location of the datasheet within your organization's portfolios.
Private	Select this check box if you want the datasheet to only be available to you. Clear the check box if you want the datasheet to be available to all users that have access to datasheets for the portfolio. When the Private check box is selected, only the user that created the datasheet can view and modify the datasheet, unless you are sharing the datasheet.
Share	This button is only available if the Private check box is selected on a datasheet that you created. If you selected the Private check box, but would like to share the datasheet with specific users and/or security groups, you can share the datasheet. When you share a datasheet, the users and/or members of the security groups you assigned to the datasheet can also view and modify the datasheet. Click the Share button on the General tab on the New Datasheet , Datasheet Properties , or Datasheet Type Properties page to assign users and/or security groups to the datasheet on the Datasheet Shared Access page.
Show All Roles	Select this check box check box to display excluded rows on the datasheet. A row is excluded on a datasheet when the check box to the left of the row is cleared. Excluded rows are displayed in gray on the datasheet. If the Show All Roles check box is cleared, the excluded rows are not displayed on the datasheet.
Show Unallocated	Select the Show Unallocated check box to display the differences between a parent work item and its child work item for roll-up attributes in non-roll-up dimensions, such as the target dimension.

Fields	Description
Work Items	Select the Include All Types option to include all work item types on the datasheet. Select the Include Only These Types option and select the work item types you want to include on the datasheet. To select more than one work item type from the list, press CTRL while selecting each work item type.

Guidance

A guidance page is a place from which you can find a small collection of quick details about important areas of the application, such as adding users or managing a work item list, viewing tasks, and so on. Links to additional help, videos, specific areas in the application, and other sources of information are provided.

Disable

If you feel like you don't need the guidance page, you can hide it.

To disable a guidance page

1. From the application toolbar, select the drop-down associated with your name.
2. Chose **Settings**.
3. Under **Selected Homepage Tabs**, select **Guidance**, and then click the left-facing arrow.

Homepage



4. Click **OK**.

Enable

If you would like to view a page that provides some guidance about how to use Serena Agile On Demand, you can enable it.

To enable a guidance page

1. From the application toolbar, select the drop-down associated with your name.
2. Chose **Settings**.
3. Under **Available Homepage Tabs**, select **Guidance**, and then click the right-facing arrow.

Homepage

Available Homepage Tabs

Product Owner Dashboard
Scrum Master Dashboard
Stakeholder Dashboard

Selected Homepage Tabs

My Work
Guidance

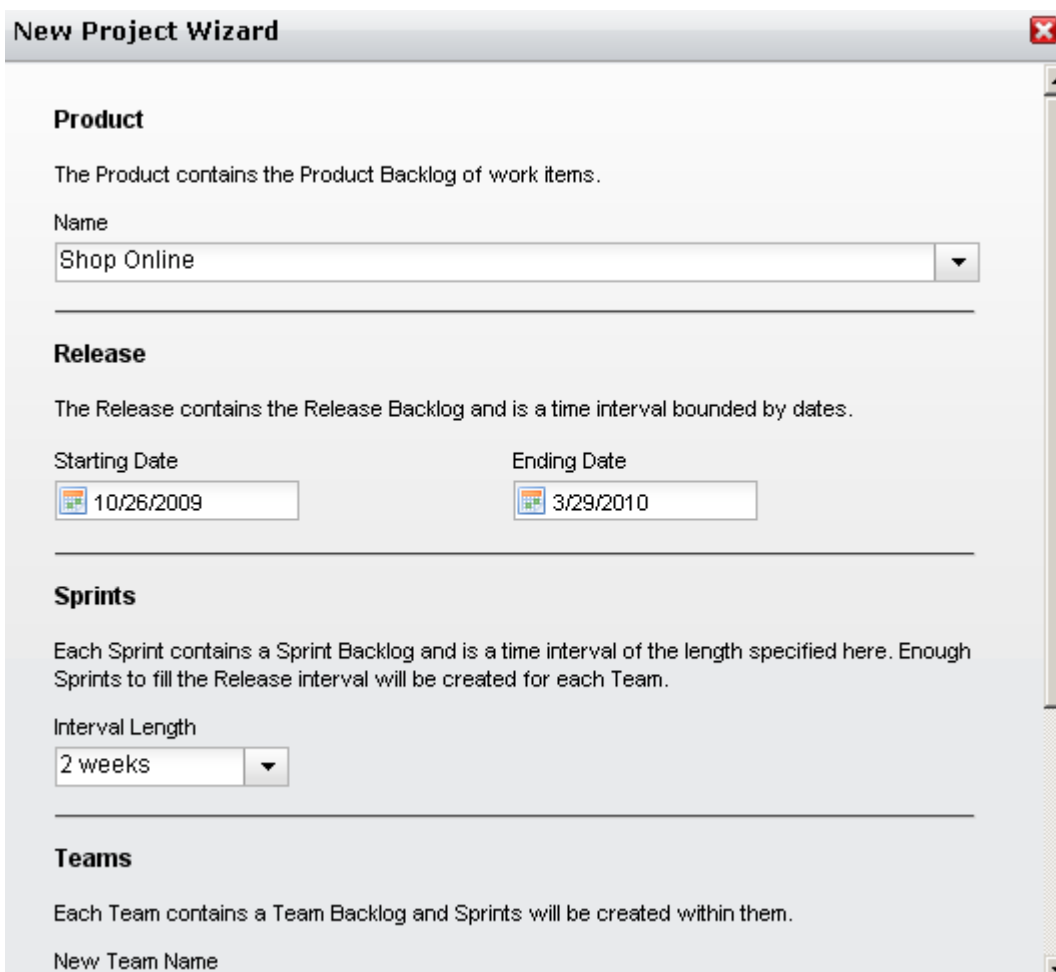
4. Click **OK**.

Projects

You can create new collections of projects, release, sprints, and teams by using the **New Projects Wizard**.

New Projects Wizard

The **New Projects Wizard** can be used to create new (and manage existing) collections of projects, resources, sprints, and teams.



The screenshot shows the 'New Project Wizard' dialog box with a title bar containing a close button. The dialog is divided into four sections: Product, Release, Sprints, and Teams. Each section has a descriptive sentence and input fields. The 'Product' section has a 'Name' dropdown menu with 'Shop Online' selected. The 'Release' section has 'Starting Date' and 'Ending Date' fields, both with calendar icons and dates '10/26/2009' and '3/29/2010' respectively. The 'Sprints' section has an 'Interval Length' dropdown menu with '2 weeks' selected. The 'Teams' section has a 'New Team Name' input field.

New Project Wizard

Product

The Product contains the Product Backlog of work items.

Name
Shop Online

Release

The Release contains the Release Backlog and is a time interval bounded by dates.

Starting Date
10/26/2009

Ending Date
3/29/2010

Sprints

Each Sprint contains a Sprint Backlog and is a time interval of the length specified here. Enough Sprints to fill the Release interval will be created for each Team.

Interval Length
2 weeks

Teams

Each Team contains a Team Backlog and Sprints will be created within them.

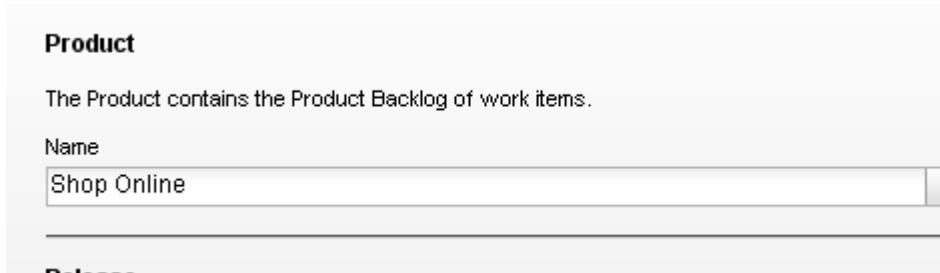
New Team Name

Add Project

A simple way to begin using Agile On Demand is to create the products, releases, teams and sprints that will comprise your Agile portfolio. Each work item serves as an independent backlog to which any work item can added, moved, and tracked. The **New Project Wizard** is the fastest and easiest way to set up a product, release, team, and sprint structure.

To create a project using the New Projects Wizard

1. Open the **Backlogs** module.
2. Click **More**, and then select **New Projects** to open the **New Projects Wizard**.
3. Enter the name of the project that you wish to add. Or select the name of an existing product.



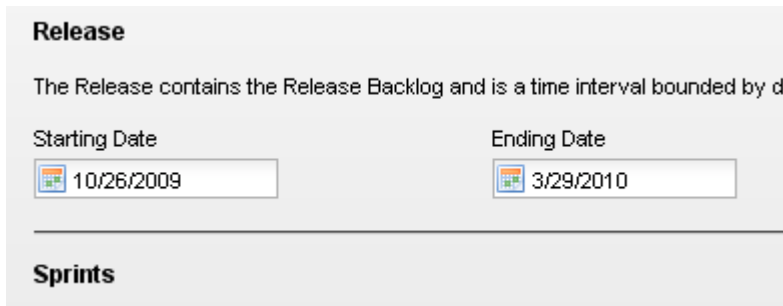
Product

The Product contains the Product Backlog of work items.

Name

Shop Online

4. Enter the name of the release that you wish to add. Or select the name of an existing release. Define the length of the release.



Release

The Release contains the Release Backlog and is a time interval bounded by dates.

Starting Date

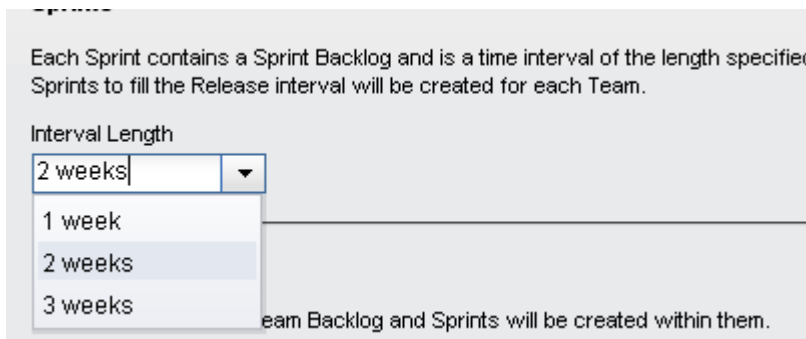
Ending Date

10/26/2009

3/29/2010

Sprints

5. Select the interval length for each sprint. The number of sprints created depends on the overall length of the release and the number of sprints each release will contain. For example, if you specify that each release is 9 weeks, and then you select a 3 week interval for each sprint, each release will then contain 3 sprints.



Each Sprint contains a Sprint Backlog and is a time interval of the length specified. Sprints to fill the Release interval will be created for each Team.

Interval Length

2 weeks

1 week

2 weeks

3 weeks

Team Backlog and Sprints will be created within them.

6. Enter the name of a new team or select the an existing team, and then click **Add**.

Each Team contains a Team Backlog and Sprints will be created within them.

New Team Name

Front End ▼ Add

Selected Teams

Infrastructure

Help Next Finish Cancel

- After you have selected your products and teams and defined the length of a release and the number of sprint intervals each will contain, click **Next**.
- Verify that the projects, resources, sprints, and teams are what you wish to create, and then click **Finish**.
- Verify in the backlogs tree that you have created the correct projects, resources, sprints, and teams.

Work Items

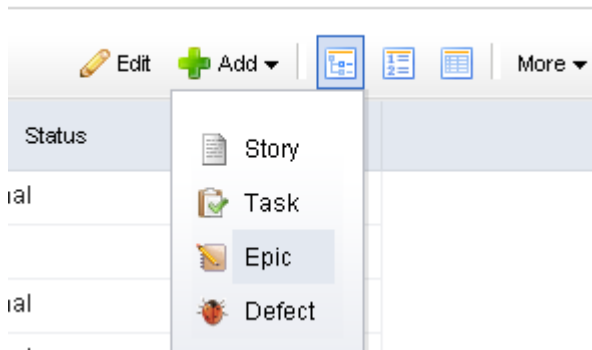
A work item is anything that is used to build and track work during any phase of a product's lifecycle, including high-level features (epics), a more detailed work item (such as a story and its individual tasks), issues raised by customers or members of your test team (defects), and issues that prevent team members from completing their assignments (impediments).

Add

You can add a work item to a backlog.

To add a work item

- Select a backlog, choose + Add, and select the work item type you wish to add.



- Enter the name and description for the work item.

Name

Description

B

I


U

~~S~~









3. Set the priority, business value, and theme.

	Business Value	Theme
1		
2		
3		
4		
5		

4. Select the **Tracking** tab to assign an owner and to specify estimated and actual hours.

Product Owner	Estimated Effort
Elias Israel	8
	Remaining Effort
	8

5. Select the **Notes** tab to enter any notes that may be needed for the work item or for the team member assigned to the work item.


Notes

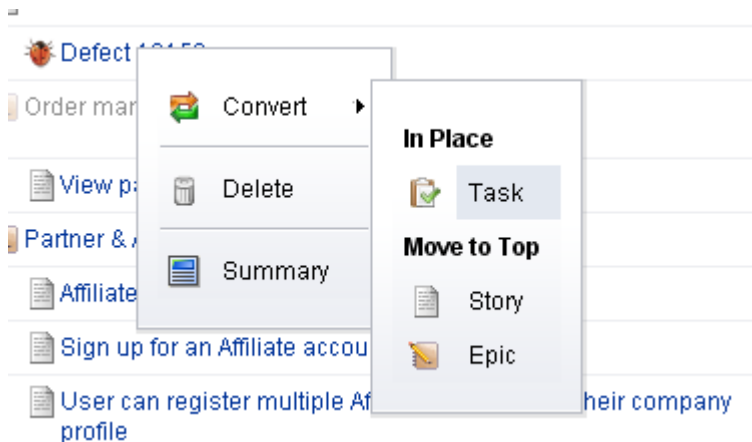
- When you are finished, click **OK** to save this work item and close the dialog box. If you want to create another work item, click **Save & Add Another**.

Convert

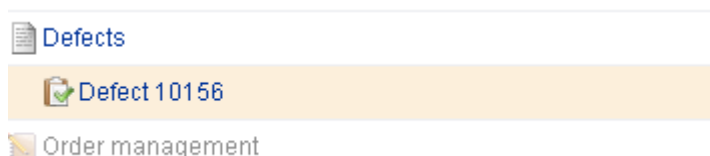
A work item, once created, can be converted to another work item (if that becomes necessary).

To convert a work item

1. Select a backlog, choose  Convert, and select the work item to which the current work item will be converted.



2. Verify.

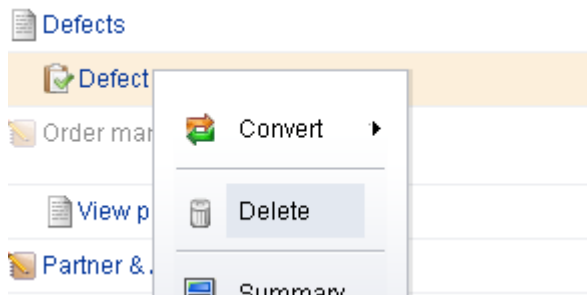


Delete

You can delete a work item from a backlog.

To delete a work item

1. Select a backlog, choose  Delete, and select the work item you want to delete.



2. Confirm.

Edit details

You can edit the details of any work item to which you have access or details which cannot be edited directly in the backlog itself. Click the name of the work item directly in the backlog to open its summary details.

To edit the details of a work item

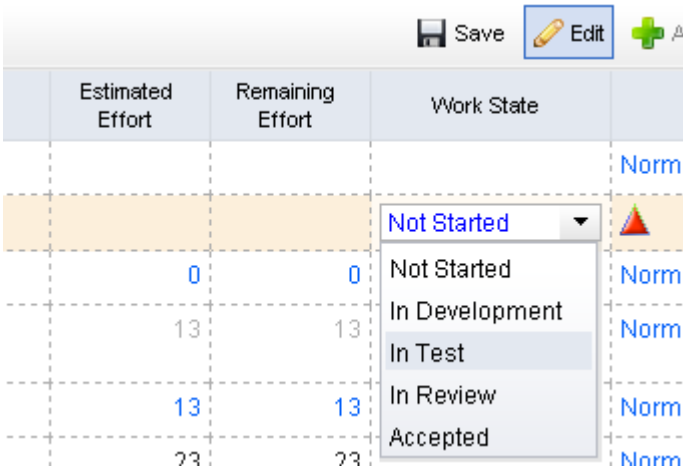
- 1. Select a backlog, choose a work item and click its name.
- 2. Make any changes you need to make.
- 3. Click **OK**.

Edit inline

You can edit the details of any work item directly in a backlog.

To edit a work item inline

- 1. Select a backlog.
- 2. In the backlog toolbar, click Edit.
- 3. Select the work item. Select a column. Double-click. Make your changes.





- 4. Click Save. (To exit without saving changes, click Edit.)

Move

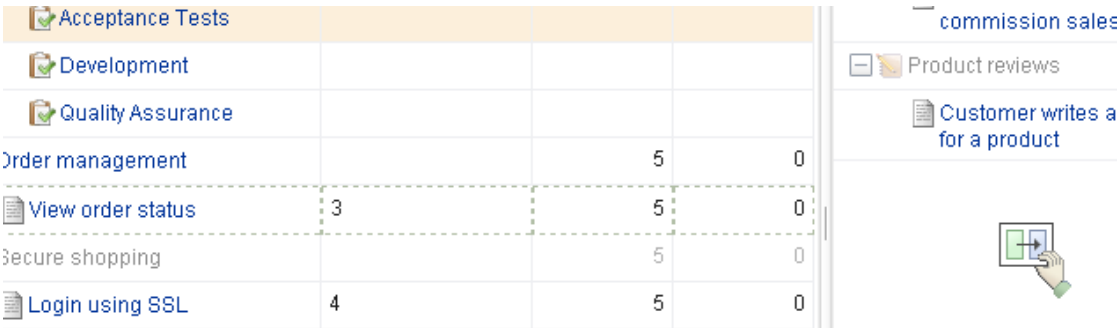
You can move a work item from one backlog into another. When backlogs are side-by-side in the same view, you can select a work item in one backlog and drag it into the other.

Icon	Description
	New backlog. This will drop the work item into the new backlog. The backlog will refresh and the work item will appear in the new backlog (and disappear from the old backlog).
	Re-rank. This will drop the work item into the selected location; the backlog will refresh and the work items will be in the new order.
	Re-parent. This will drop the work item into the selected location; the backlog will refresh and the work items will be in the new order.

Icon	Description
	New phase. This will drop the work item into a new phase in a storyboard (or card wall). The storyboard will refresh and the work item will be moved to the new phase.
	Invalid. You cannot drag-and-drop a work item into a backlog when this icon appears.

To move a work item between backlogs

- 1. Select the backlogs to and from which a work item will be moved, and then select the work item you wish to move.
- 2. Click and hold down the work item, and then drag it to its new backlog.




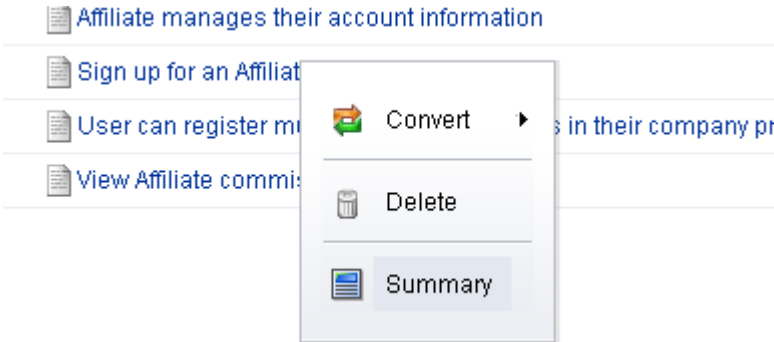
- 3. Verify.

View summary

There are two ways to view the details of a work item. Select the name of the work item in a backlog, right-click, and select **Summary**. Or just click the name of the work item in the backlog.

To view a work item

- 1. Select a backlog.
- 2. Select a work item in the backlog.
- 3. Right-click and select  Summary.



Summary

You can use the work item properties dialog box to manage data about the work item, including data that is specific to the work item type (such as epics, stories, or tasks), data that is used for tracking progress against that work item, notes that may have been entered by team members, and a history of changes that have been made to the various settings related to the work item.

Work Item Type

This tab in the **Work Item Properties** dialog box is used to view and update certain properties which relate to the work item, such as (for a story) **Acceptance Criteria**, **Business Value**, and **Story State**. The name of the tab is determined by the work item for which you are currently viewing properties. Depending on the work type, the following fields may be available from this tab:

Fields	Description
Acceptance Criteria	The criteria to be completed before a work item can be accepted.
Business Value	The business value for a work item.
Description	The description of a work item in the application, such as a task, work item, summary, and so on.
Development Owner	The name of the resource who has been assigned to do the actual work related to the work item.
Estimated Effort	The amount of effort, measured in story points, required to complete all of the work associated with a work item.
Name	The name of a task (or a task plan).
Priority	Indicates the importance of the task in relation to other tasks. 500 is the default value; 1000 is the highest priority and 0 is the lowest priority. The higher the number, the higher the priority.
Quality Assurance Owner	The name of the tester who has been assigned to do validate the quality of the work related to the work item.
Remaining Effort	The amount of effort, measured in story points, required to finish all of the remaining work associated with a work item.
State	The state of a task.
Status	The current status of a work item, task, or project.
Story State	The current state of a work item, such as Not Started , In Development , In Testing , Ready for Review , and Accepted .

Fields	Description
Task Hours Actual	The actual hours required to complete actual work.
Task Hours Estimated	The amount of effort, measured in actual hours, that are required to complete all of the work that is associated with a work item.
Task Hours Remaining	The amount of effort, measured in actual hours, that are required to finish all of the remaining work that is associated with a work item.
Theme	The name of the theme that is associated with a work item.

Tracking

The **Tracking** tab in the **Work Item Properties** dialog box is used to show tracking details about how the work being done against a work item is progressing. Depending on the work type, the following fields may be available from this tab:

Fields	Description
Created By	The name of the resource who initially created the task, task plan, work item, and so on.
Created Date	The date on which a task, task plan, work item, and so on, was created.
Dev Owner	The name of the resource who has been assigned to do the actual work related to the work item.
Estimated Effort	The amount of effort, measured in story points, required to complete all of the work associated with a work item.
Item ID	The unique ID for the work item.
Last Modified By	The user name of the person who made the most recent changes to the task, task plan, or work item.
Last Modified Date	The date on which the most recent changes were made to the task, task plan, or work item.
Parent Item	The unique ID for the parent task.
Product	The name of the product.
Product Owner	The name of the product owner who has been assigned to approve the work related to the work item.

Fields	Description
QA Owner	The name of the tester who has been assigned to do validate the quality of the work related to the work item.
Release	The name of the release.
Remaining Effort	The amount of effort, measured in story points, required to finish all of the remaining work associated with a work item.
Sprint	The name of the sprint.
Task Hours Actual	The actual hours required to complete actual work.
Task Hours Estimated	The amount of effort, measured in acutal hours, that are required to complete all of the work that is associated with a work item.
Task Hours Remaining	The amount of effort, measured in acutal hours, that are required to finish all of the remaining work that is associated with a work item.
Team	The group of individual resources who comprise a SCRUM team, typically a single product owner, several engineers and testers, and (occasionally) other resources, such as support, documentation, and sales.
Work State	The current state of a work item, such as Not Started, In Development, In Testing, Ready for Review , and Accepted .

Notes

The **Notes** tab in the **Work Item Properties** dialog box is used to capture comments, notes, and other non-work related data about the task.

History

The **History** tab in the **Work Item Properties** dialog box is used to show the update history of the work item, including what changed, the date it was changed, what the new value is, what the old value was, and who made the change.

Work Types

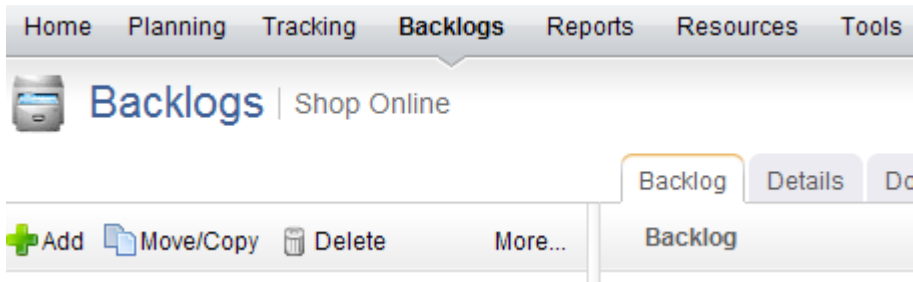
A work type is defined as a project, release, sprint, or team. Every work type is placed in a hierarchical structure called the work tree that orders each work type in relation to its parent work type, any peer work type, and any child work type.

Add

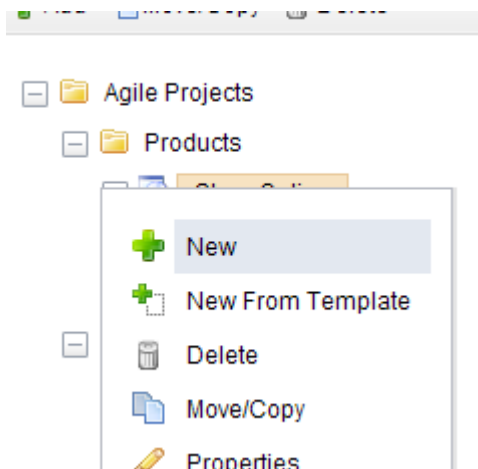
When creating a work type, identify the work type you want to create, and define the summary data for the work type.

To add a new work type

- 1. Open the **Backlogs** module.



- 2. Select a work type in the work tree under which you want to add a work type. Right-click and select **New**.



- 3. In the **New Investment** dialog box, select the work type. The work type list that is available from the drop-down will depend on the location in which you are adding a work type and the work breakdown structure your organization has created.

Select the Item Type

Release

Release

Completed

No

Name

Release 0

Start Date

10/19/2009

End Date

2/16/2010

Health Status

Y

Yellow

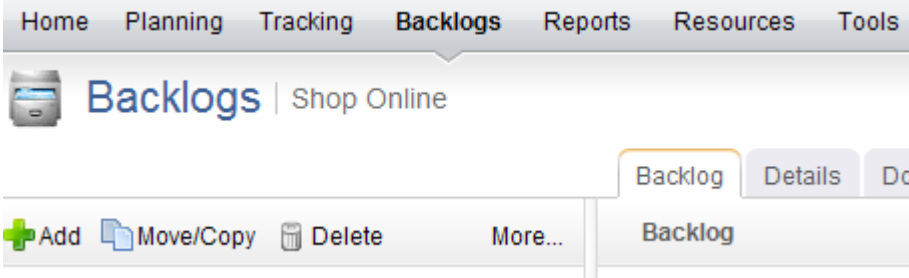
- 4. Click **OK**.


Copy

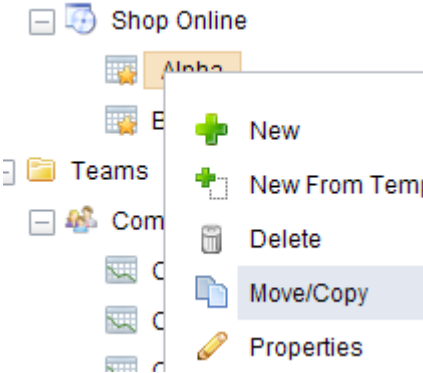
You can copy an existing work type, modify its summary data and properties, create a new work type, and then place it anywhere in your portfolio.

To copy a work type

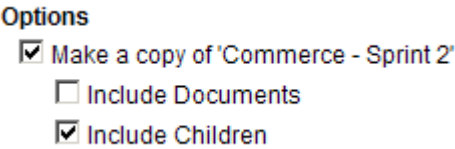
- 1. Open the **Backlogs** module.



2. In the work tree, select the work type you want to copy, right-click and select  Copy.



3. In the **Move/Copy** dialog box, under **Options**, select **Make a copy** and choose whether you want to also copy any related documents, a child work type, or tasks.



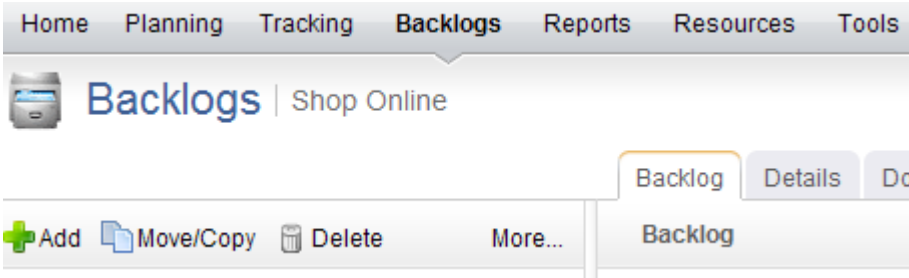
4. Select the location in the work tree into which a copy of the work type will be added.
5. Click **OK**.

Delete

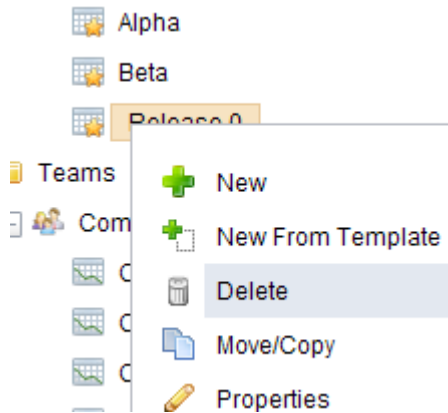
If you no longer need a work type, you can delete it.

To delete a work type

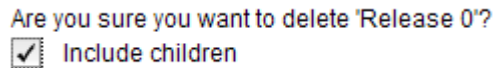
1. Open the **Backlogs** module.



2. Right-click the work tree, select a work type, and click  Delete.



3. In the **Delete** dialog box, select the **Include Children** check box if you would like to delete the selected work type and any work type indented below it.



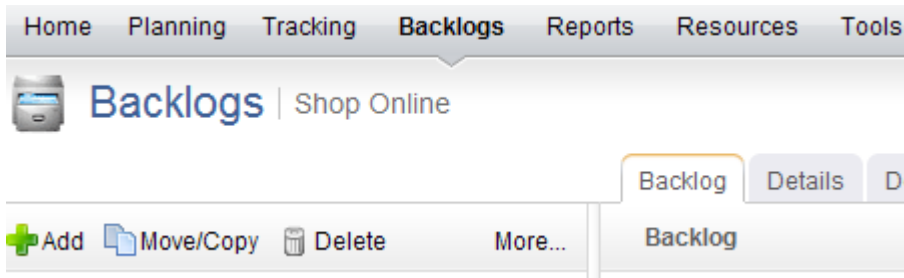
4. Click **OK**.

Edit

You can edit the details of any work type.

To edit a work type

1. Open the **Backlogs** module.



2. In the work tree, select a work type.
3. Make your changes from the **Details** tab.

Backlog Burndown **Details** Documents History

Details

Name Corr

Alpha

Start Date End Date Hea

10/6/2008 10/31/2008

- Click **OK**.

Move

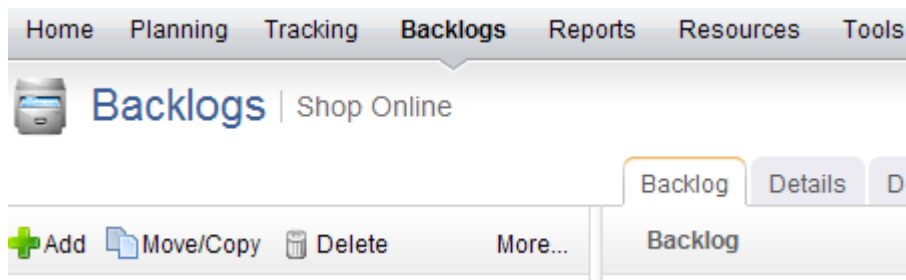
You can move a work type around in the work heirarchy. The simplest way to move a single work type is to drag-and-drop it into the location in the heirarchy that you want it to be.

The **Move Investment** dialog lists any work type that you are authorized to view. A work type is displayed by default in a tree view that you can navigate just like the navigation pane in the **Backlogs** module. When you select a work type for a report or a notification, the selection applies to that work type and any work type below it in that branch of the tree view. When you select a work type for include/exclude or self-allocating activities, the selection applies only to that work type.

You can also enter in a word or phrase and click **Search** to display a list of any work type that matches your search criteria. You can easily alternate between the tree view and the search results by clicking the **Show Tree** or **Show Search Results**, depending on the current view.

To move a work type

- Open the **Backlogs** module.



- In the work tree, select the work type you want to move, right-click and select **Move/Copy**.
- In the **Move/Copy** dialog box, select the location in the work tree under which the work type will be moved.
- Click **OK**.

Properties

Use the **Properties** dialog box to view the properties for a project, release, sprint, task plan, or any other work item or work type that is currently in the application.

View

Use the **Investment Properties** dialog to view and modify the properties of a work type.

To view work type properties

1. Open the **Projects** module.
2. Select the work type in the navigation tree.
3. Select **More**, and then choose **Properties**.

Attribute History

The **Attribute History** tab in the **Properties** dialog box is used to view the history of changes made to an attribute.

Connector

The **Connector** tab in the **Properties** dialog box is used to view connector details.

The following fields are available from the **Connector** tab in the **Properties** dialog box:

Fields	Description
Connector Name	The names of the connections that are used to provide data for this work item. A connection is made using a recurring tasks, configured from the Jobs tab in the Scheduled Services view.
Last Refreshed	The date and time when a work item was last updated. The frequency of updates is determined by the connection properties that have been configured for the recurring task.

General

The General tab in the **Properties** dialog box is used to general information about a project, release, task, task plan, or any other work item or work type in the application.

The following fields are available from the **General** tab in the **Properties** dialog box:

Fields	Description
Created By	The name of the resource who initially created the task, task plan, work item, and so on.
Created Date	The date on which a task, task plan, work item, and so on, was created.
Hide On Timesheet	Indicates whether tasks related to this work item will appear in a resource's timesheet. If selected, then the task will not appear in a resource's timesheet.

Fields	Description
Item Name	The name of the work item.
Item Type	The the type of work item. If the work item is task-based, then the list will contain task-based work item types. If the work item is activity-based, then the list will contain activity-based work item types.
Last Modified By	The user name of the person who made the most recent changes to the task, task plan, or work item.
Last Modified Date	The date on which the most recent changes were made to the task, task plan, or work item.
Lock Completed Assignments	Indicates whether resources are prevented from submitting time against a task or work item that has been marked as complete.
Self Allocation Allowed	Indicates whether a resource is allowed to allocate themselves to a task or work item, and any activities associated with them. The default setting for this option is inherited from the work item type, but the setting can be configured on a per-work item basis. If self-allocation is allowed, then self-assignment is also allowed. Select this option when you want resources to be able to self-allocate to this work item.
Self Assignment Allowed	Indicates whether a resource is allowed to assign themselves to a task or work item, and any activities associated with them. The default setting for this option is inherited from the work item type, but the setting can be configured on a per-work item basis. If you want to allow self-assignment, but disallow self-allocation, then select this option and de-select Self Allocation Allowed.

Role Assignments, Advanced

The **Role Assignments, Advanced** tab in the **Properties** dialog box is used to advanced role assignment details.

The following fields are available from the **Role Assignments, Advanced** tab in the **Properties** dialog box:

Fields	Description
Add	Click this button to add a selected user and/or security group to the role assignment for this work item. This will add the Is Assigned To Role icon in the Assignment column.

Fields	Description
Assignments	Indicates whether a user and/or a security group has a role assignment to the selected work item. If the column shows Is Assigned To Role, the user and/or security group has been given a role assignment to the selected work item. If the column shows Inherits Assignment To Role, the user and/or security group is inheriting its role assignment from a role assignment made to a parent work item. If the column shows Does Not Inherit Assignment To Role, the user and/or security group is not inheriting its role assignment from a parent work item.
Clear	Click to clear a selected user and/or security group from the role assignment for this work item. This will remove the Is Assigned To Role or the Does Not Inherit Assignment To Role icons from the Assignment column.
Group / User	The users and/or security groups that are available for role assignments to this work item.
Manage By	Indicates how role assignments are managed. Select Role to manage role assignments by security role. Select Group / User to manage role assignments by user and/or security group.
Parent Groups	The security group(s) to which a user and/or security group belongs. This column is only visible when the Role option is selected for the Manage By option.
Remove	Click to remove a selected user and/or security group from the role assignment for this work item. This will add the Does Not Inherit Assignment To Role icon in the Assignment column.
Role	The security role(s) from which users and/or security groups can be given role assignments.
Show Unassigned	Click to show role assignments by security roles or by users and/or security groups. Only roles, users, and groups without a role assignment will be shown.
Show Users	Click to show the users and security groups that are available for role assignments.
Simple	Click to view the Role Assignments tab using the Simple layout.

Role Assignments, Simple

The **Role Assignments, Simple** tab in the **Properties** dialog box is used to view role assignment details.

The following fields are available from the **Role Assignments, Simple** tab in the **Properties** dialog box:

Fields	Description
Add	Click this button to add a selected user and/or security group to the role assignment for this work item. This will add the Is Assigned To Role icon in the Assignment column.
Advanced	Click to view the Role Assignments tab using the Advanced layout.
Assignments	Indicates whether a user and/or a security group has a role assignment to the selected work item. If the column shows Is Assigned To Role, the user and/or security group has been given a role assignment to the selected work item. If the column shows Inherits Assignment To Role, the user and/or security group is inheriting its role assignment from a role assignment made to a parent work item. If the column shows Does Not Inherit Assignment To Role, the user and/or security group is not inheriting its role assignment from a parent work item
Clear	Click to clear a selected user and/or security group from the role assignment for this work item. This will remove the Is Assigned To Role or the Does Not Inherit Assignment To Role icons from the Assignment column.
Group / User	The users and/or security groups that are available for role assignments to this work item.
Remove	Click to remove a selected user and/or security group from the role assignment for this work item. This will add the Does Not Inherit Assignment To Role icon in the Assignment column.
Show Users	Click to show the users and security groups that are available for role assignments.

Widgets

Serena Agile On Demand ships with an out-of-the-box configuration that is based on the SCRUM methodology. The individual components of the configuration are based on widgets, such as a work item list, document stores, a burndown chart, storyboards, and so on. If your organization uses Agile differently, or would prefer to customize your Agile On Demand configuration, you can add (or remove) individual widgets, entire tabs, and modules. No matter what configuration and methodology your organization uses, how your organization uses Agile On Demand stays the same, with the basic core elements giving you consistent functionality wherever you decide to use them.

Sometimes widgets will appear together on as a homepage, which may contain information that is targeted at specific user roles such as scrum master or team member. A user homepage is often customized to meet the specific needs of your organization, project management style, and individual team structures. Depending on your homepage, the following widgets may be available.

For more information, see the following topics:

- [Burndown Chart \[page 88\]](#)

- Card Wall [page 88]
- List [page 89]
- My Work [page 90]
- Summary View [page 91]
- URL Container [page 91]
- Widget Wireup [page 91]

Burndown Chart

A **Burndown Chart** is used to add a burndown chart to a page in the application.



Card Wall

A **Card Wall** is used to add a card wall (also known as a storyboard) to a page in the application.

ase Burndown

Sprint Burndown

Sprint Task Burndown

Sprint Storyboard

Source

Commerce - Sprint 3

Not Started	In Development	In Test	In Review
<div>software download</div> <div>Estimated 8 Effort: Remaining 0 Effort: Dev Owner: Tara Team Member QA Owner: Status: Normal</div>	<div>Cross sell based on sales volume</div> <div>Estimated 8 Effort: Remaining 0 Effort: Dev Owner: James Scott QA Owner: Status: Normal</div> <div>Updates to product prices adjust account-level pri ...</div> <div>Estimated 13 Effort: Remaining 0 Effort: Dev Owner: Tom Team Member QA Owner: Status: Normal</div>	<div>Add a specific configuration of a product to a car ...</div> <div>Estimated 5 Effort: Remaining 0 Effort: Dev Owner: Tara Team Member QA Owner: Status: Blocked</div>	<div>Add quantity of installed licenses to cart for ...</div> <div>Estimated 3 Effort: Remaining 0 Effort: Dev Owner: Jan QA Owner: Status:</div>





List

A **List** is used to add a work item grid to a page in the application.

Backlog Planning Multi Planning Product Owner Storyboard				
products				
Shop Online				
Save Edit				
Name	Estimated Effort	Remaining Effort	Work State	
Commission tracking for Partners and Affiliates				Norm
Cross selling			Not Started	
Defects	0	0	Not Started	Norm
Defect 10156				Norm
Order management	13	13		Norm
View past order details	13	13	Not Started	Norm
Partner & Affiliate tools	23	23		Norm
Affiliate manages their account information	5	5	Not Started	Norm
Sign up for an Affiliate account	5	5	Not Started	Norm
User can register multiple Affiliate site URLs in their company profile	5	5	Not Started	Norm
View Affiliate commission balance	8	8	Not Started	Norm

My Work

The **My Work List** control is used to provide team members with a location from which they can view and access all of any work item to which they are currently assigned.

<div> <div>Guidance</div> <div>My Work</div> <div>Scrum Master Dashboard</div> <div>Product Owner Dashboard</div> <div>Stakeholder Dashboard</div> </div>				
Name	Estimated Effort	Remaining Effort	Work State	Estimated Hours
 Add quantity of install licenses to cart for software	3	0	In Review	25
 Defect 10156				4
 Sign up for an Affiliate account	5	5	Not Started	0
 View Affiliate commission balance	8	8	Not Started	0

Total	16	13		29
-------	----	----	--	----

Summary View

A **Summary View** is used to add summary information to a page in the application. Summary information can be associated with other information, such as lists or backlogs. Summary information can be configured so that changes made to summary data updates any lists to which that summary is associated.

URL Container

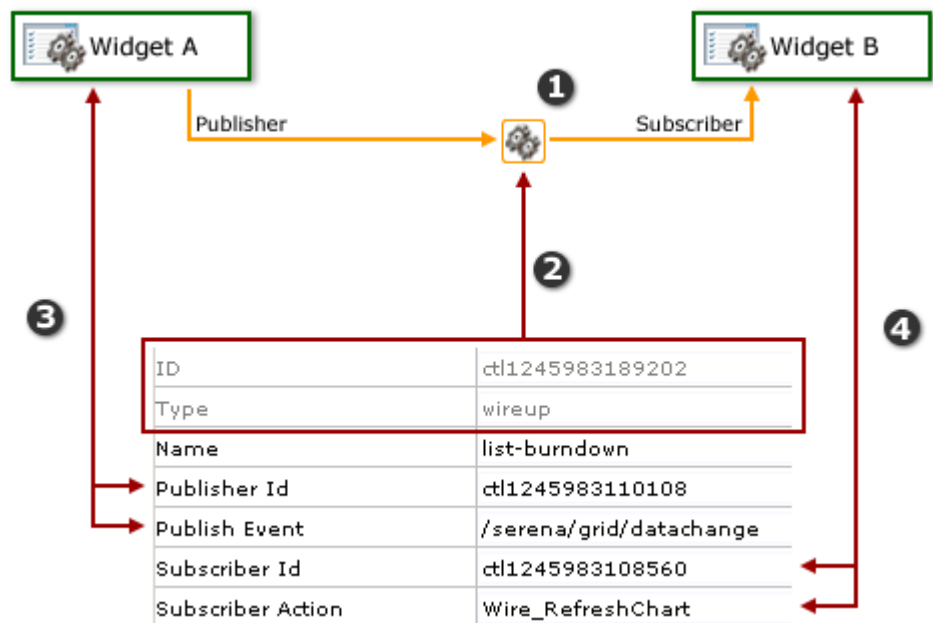
A **URL Container** is used to display information that resides elsewhere inside of your project workspace. A **URL Container** can point to any URL-addressible content, including reports on other internal systems, such as those generated by SAP or by Serena Business Mashups, or to content located on external systems, or to a location on the Internet.

Widget Wireup

A **Widget Wireup** is used to make associations between widgets in an application. For example, you can use a widget wireup to associate a List widget and a **Summary View** widget, so that the summary is opened based on the selected work item in the list, and then when the work item is updated (from the summary), those changes are then saved and updated in the list.

Overview

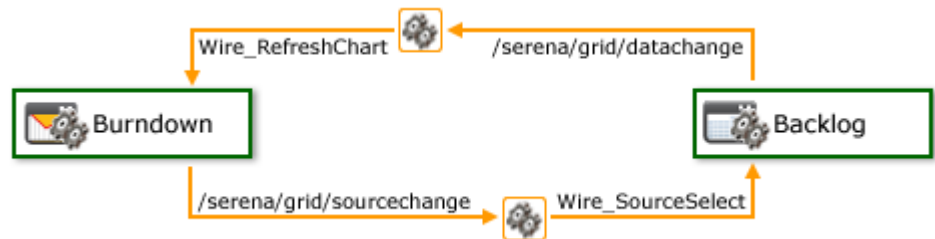
Each widget wireup is configured as a one-way relationship between two widgets, where the publish event in one widget determines the subscriber action in another.



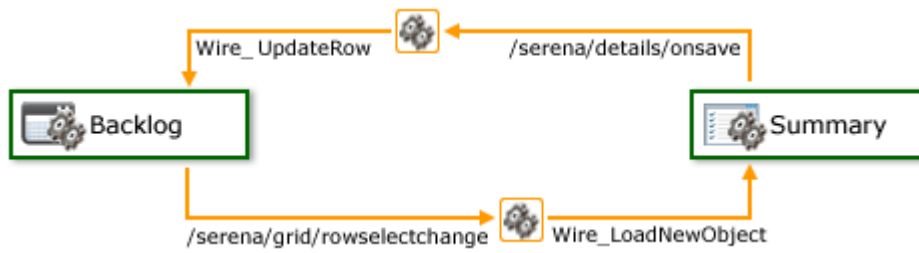
In the diagram above, the numbers correspond to the following:

- 1. The wireup itself, and the relationship that will be configured.
- 2. The ID and type of widget.
- 3. The publisher settings for the wireup. A wireup listens for a specific event (**Publish Event**) that is being broadcast by a specific widget (**Publisher ID**).
- 4. The subscriber settings for the wireup. A wireup takes a specific action (**Subscriber Action**) on a specific widget (**Subscriber ID**).

Many wireup relationships can be configured as pairs, such as the release, sprint, and task burndown charts that are included in the out-of-the-box configuration of Agile On Demand. In these cases, the wireup relationships are configured to show the backlog associated with the selected burndown chart.



For example, a wireup could be added to a **Backlog** widget that is configured to listen for the **onsave** event to be triggered from a **Summary View** widget. When a team member clicks Save in the **Summary View** widget, the wireup will then tell the **Backlog** widget to update the work item (using the **Wire_UpdateRow** publish event).



You can also create multiple wireup relationships between widgets, as long as there isn't more than one configured relationship between widgets for each publish event or subscriber action.



Reports

The **Reports** module enables you to view and analyze work item data at the portfolio level. This high-level view helps provide your organization both portfolio planning and portfolio monitoring capabilities. Portfolio managers and analysts can perform "what-if" analysis and comparisons, aggregate data across a portfolio to facilitate better decision-making, as well as track portfolio performance over time. This allows you to analyze and monitor your organization's portfolio data using datasheets. Datasheets are read-only spreadsheets in the **Reports** module that display data about any work item in the associated portfolio.

Portfolio managers arrange columns on datasheets to provide logical data calculations, comparisons, and roll-ups. A datasheet can be used to analyze entire portfolios, or any work item in a similar grouping, and can display different dimensions, units, and periods of data. Portfolios can have more than one datasheet, and any datasheet can be copied or moved to another portfolio.

You can use the **Datasheets**, **Timegrid**, and **Timeline** tabs to build and work with datasheets that illustrate the performance of your organization's portfolios at various levels.

For more information, see the following topics:

- [Charts \[page 94\]](#)
- [Datasheets \[page 100\]](#)

Charts

You can use the **Charts** tab to create and maintain charts for datasheets. You can add new charts, edit charts, move or copy charts, remove charts, and view chart properties. Charts can be saved as datasheet types, printed, or sent via email. Charts belonging to a datasheet type cannot be edited in the **Charts** tab, even if you have permissions for editing charts in the **Charts** tab.

The view toolbar in the **Charts** tab contains a datasheet snapshot list, and displays the name of the snapshot you are viewing. If you are viewing the current datasheet data or snapshots are not enabled, **Live** is displayed on the toolbar.

The **Charts** tab helps you view portfolio data visually by using the following chart types:

- Advanced Bubble
- Bar
- Bubble
- Burndown
- Column
- Gauge
- Pie
- Range Column
- Stacked Bar
- Stacked Column

- Timephased Area
- Timephased Stacked Column

Add

Create a chart to view data for any datasheet that has been saved and to which you have access.

To add a chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Click **New Chart**.
5. In the **New Chart** dialog box, select a chart.
6. In the **New Chart** dialog box, choose a chart: **Advanced Bubble, Bar, Bubble, Burndown, Column, Gauge, Pie, Range Column, Stacked Bar, Stacked Column, Timephased Area, or Timephased Stacked Column**.
7. Enter a name and a description.
8. On the **Attributes** tab, specify what you want to compare.
9. On the **Chart Settings** tab, select how you want to view data in the chart.
10. On the **Gauge Settings** tab, define the gauge properties and the scale with which you want to present data. This tab is only available for the **Gauge** chart type.
11. On the **Timephase Settings** tab, choose from start and end dates, time periods, or if you want to sync the chart with a datasheet. This tab is only available for the **Burndown, Timephased Area, and Timephased Stacked Column** chart types.
12. On the **Axis Settings** tab, choose major and minor grid lines. This tab is available for all of the chart types except **Gauge** and **Pie**.
13. Click **Save**.

Copy

You can create new charts based on charts that are already there.

To copy a chart

1. Open the **Reports** module.
2. Select an datasheet.
3. Select the **Charts** tab.
4. Click **Copy** to copy a chart.
5. In the **Move/Copy Chart** dialog box, select **Make a copy**.
6. In **Destination**, choose the destination datasheet for the new chart.
7. Click **Save**.

Delete

If you don't need a chart, you can delete it.

To delete a chart

1. Open the **Reports** module.
2. Select an datasheet.
3. Select the **Charts** tab.
4. Click **Copy** to copy a chart.
5. In the **Move/Copy Chart** dialog box, select **Make a copy**.
6. In **Destination**, choose the destination datasheet for the new chart.
7. Click **Save**.

Edit

Make changes to a chart. Change the axis options or the properties. A datasheet type chart can only be edited by a user with specific permission to do so.

To edit a chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Select a chart and click **Edit Chart**.
5. In the **Chart Properties** dialog box, make your changes.
6. Click **Save**.

Move

If you want to associate a chart with another datasheet, you can move it.

To move a chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Select a chart and click **Edit Chart**.
5. In the **Chart Properties** dialog box, make your changes.
6. Click **Save**.

Save

You can save any chart.

To save a chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Select a chart.
5. Click **View** to view the chart.

6. Click **Save** to save the picture.
7. Select a file format, a location to which the chart will be saved, and click **OK**.

View properties

Charts belonging to a datasheet type cannot be created or edited in the **Charts** tab, even if you have permissions for editing charts in the **Charts** view. When you select a datasheet type chart in the **Charts** tab, the only actions available for the chart is view, regardless of your security role permissions. Users with the appropriate permissions can create and edit charts for datasheet types from the Datasheet Type Charts page.

The Chart Properties dialog describes information about a chart. This dialog appears when creating a new chart or when modifying the properties for an existing chart. Depending on the chart you are creating or have selected, different options will be available.

The following types of charts are available:

- Advanced Bubble
- Bar
- Bubble
- Burndown
- Column
- Gauge
- Pie
- Range Column
- Stacked Bar
- Stacked Column
- Timephased Area
- Timephased Stacked Column

Chart properties vary from chart to chart. Every chart has a name (required) and a description (optional). Depending on the chart, the following tabs may be available:

- **Attributes** This tab allows you to define the attributes that display in the chart.
- **Axis** This tab is used to determine whether major and minor grid lines are displayed on a chart for both the X axis and the Y axis.
- **Chart** This tab is used to define general settings for the chart.
- **Timephase** This tab is used to define a chart's timephase settings.
- **Gauge** This tab enables you to set the properties for the attributes selected on the Attributes tab.

To view chart properties

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Right-click the datasheet and select **Chart Properties**.

Datasheet Type Charts

When you select a datasheet type chart in the **Charts** tab, the only actions available for the chart is view, regardless of your security role permissions. Users with the appropriate permissions can create and edit charts for datasheet types from the **Datasheet Type Charts** dialog. The **Datasheet Type Charts** dialog has the same functionality as the **Charts** tab, except that it is only used for managing datasheet type charts, and you cannot view charts from the **Datasheet Type Charts** dialog.

The **Manage Datasheet Types** dialog is used to edit, copy, and delete datasheet types, as well as create and manage datasheet type charts. When you click **Promote to Datasheet Type** in the **Reports** module, the **Promote to Datasheet Type** dialog opens, offering the same functionality as the **Manage Datasheet Types** dialog.

- **Datasheet Types** This list displays all of the datasheet types.
- **Edit** Select a datasheet type from the **Datasheet Types** list and click the **Edit** button to open the **Datasheet Type Properties** dialog box for the selected datasheet type.
- **Charts** Select a datasheet type from the **Datasheet Types** list and click the **Charts** button to open the **Datasheet Type Charts** dialog box for the selected datasheet type. Datasheet type charts cannot be created or edited from the **Charts** tab. Datasheet type charts must be created and edited from the **Datasheet Type Charts** dialog box.
- **Copy** Select a datasheet type from the **Datasheet Types** list and click the **Copy** button to copy the selected datasheet type. The copy of the datasheet type appears in the **Datasheet Types** list on the **Manage Datasheet Types** dialog box and the **Datasheet Types** list on the **New Datasheet**, **Datasheet Properties**, and the **Datasheet Type Properties** pages.
- **Deleting a datasheet type** Any datasheet type that is no longer needed can be deleted. When you delete only a datasheet type, any datasheets that were assigned to the datasheet type become standard datasheets, and can be edited. The datasheet will retain the datasheet properties and charts defined for the datasheet type.

Add

Create a a datasheet type chart based on a datasheet type. When a chart is created for a datasheet type. the chart is automatically added to all of the datasheets assigned to the datasheet type.

To add a datasheet type chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Select a chart.
5. Right-click the navigation tree and select **Promote to Datasheet Type Chart** to promote that chart to a datasheet type chart.

Copy

You can create new datasheet type charts based on datasheet type charts that are already there. A datasheet type chart can only be copied to datasheets that are not

assigned to a datasheet type. A datasheet type chart cannot be copied to other datasheet types.

To copy a datasheet type chart

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Charts** tab.
4. Right-click and select **Manage Datasheet Types**.
5. In the **Manage Datasheet Types** dialog box, select a datasheet type from the **Datasheet Types** list, and click **Charts**.
6. In the **Datasheet Type Charts** dialog box, select a chart.
7. Click **Copy**.
8. In the **Move/Copy Chart** dialog box, select **Make a copy**.
9. In **Destination**, choose the destination datasheet for the new chart.
10. Click **OK**.

Delete

If you don't need a datasheet type chart, you can delete it.

To delete a datasheet type chart

1. Open the **Reports** module.
2. Right-click the datasheet and select **Manage Datasheet Types**.
3. In the **Manage Datasheet Types** dialog box, select a datasheet type from the **Datasheet Types** list, and click **Delete**.
4. In the **Datasheet Type Charts** dialog box, select a chart and click **Charts**.
5. Click **OK**.

Edit

Make changes to a datasheet type chart. Change the axis options or the properties. When a datasheet type chart is edited, the chart is automatically edited on any datasheet to which the datasheet type is associated.

To edit a datasheet type chart

1. Open the **Reports** module.
2. In the datasheets tree, right-click a datasheet and select **Manage Datasheets**.
3. In the **Manage Datasheet Types** dialog box, select a datasheet type and then select **Edit Datasheet Type Chart**.
4. In the **Datasheet Properties** dialog box, make your changes. Click **OK**.
5. Click **Save**.

Move

While working with a datasheet type chart, you may determine that it belongs in a datasheet. A datasheet type chart can be moved to another datasheet within the same

portfolio or to a datasheet in another portfolio. A datasheet type chart can only be moved to a datasheet that is not assigned to a datasheet type. A datasheet type chart cannot be moved to another datasheet type, and a standard datasheet type chart cannot be moved to a datasheet type.

To move a datasheet type chart

1. Open the **Reports** module.
2. In the datasheets tree, select a datasheet, right-click and select **Move/Copy Datasheet**.
3. In the **Move/Copy Datasheet** dialog box, select the location in the datasheets tree under which you want to move the datasheet.
4. Click **OK**.

View

A datasheet type chart can be viewed from **Charts** tab.

To view a datasheet type chart

1. Open the **Reports** module.
2. Right-click the navigation tree and select **Manage Datasheet Types** to view datasheet types.

Datasheets

You can use the **Datasheets** tab to track and manage rolled-up values that reflect the current display of the view. Data can be displayed with the portfolio hierarchy, or it can be grouped by a specific box:

- When displaying data using the portfolio hierarchy, rolled up data on a parent row reflects the values of all child data indented below the parent row. Data for a portfolio row is rolled up from any work item within the portfolio.
- When displaying data grouped by a specific box, the parent row represents the value that all of the child rows indented below the parent row have in common. Data for a parent row displaying a grouped value is rolled up from any work item that contains that value.

Datasheet rows can be excluded from the roll-up values by clearing the check box to the left of the row.

You can create datasheets in two ways: from scratch or basing one on a datasheet type. When you assign a datasheet to a datasheet type, all of the datasheet's properties and charts are defined for the datasheet by the datasheet type you select.

You can make any datasheet or datasheet type that you create a private datasheet, and you have the option of sharing your private datasheet with other users and/or members of a security group. When a datasheet is private, only the user that created the datasheet can view and modify the datasheet, unless you are sharing the datasheet. When you share a datasheet, the users and/or members of the security groups you assigned to the datasheet can also view and modify the datasheet.

For more information, see the following topics:

- [Define Datasheets \[page 101\]](#)
- [Define Snapshots \[page 103\]](#)

Define Datasheets

Portfolio managers can define which columns are displayed in a datasheet from the Columns tab of the New Datasheet, Datasheet Properties, and Datasheet Type Properties dialog boxes.

You can set up a datasheet to group data by a specific box's values, and sort data by each value in a specific column on the Organize tab of the New Datasheet, Datasheet Properties, and Datasheet Type Properties dialog boxes. For example, you select *Status* from the **Group By** list, **Start** from the **Sort By** list, and then select the *Descending* option.

The groups specified on the Organize tab of the New Datasheet, Datasheet Properties, and New Datasheet dialog boxes are used to create the layers of drill-down on charts in the **Charts** tab.

If you are creating or editing a datasheet that is assigned to a datasheet type, you cannot edit any of the datasheet properties on the Columns, Filters, Organize, Time Views, or Dashboard tabs on the New Datasheet or Datasheet Properties dialog boxes.

Add

Add a datasheet for most work item types.

To add a datasheet

1. Open the **Reports** module.
2. Select the **Datasheets** tab.
3. Right-click the navigation tree and click **New Datasheet**.
4. Enter a name and select the datasheet type from which this datasheet will be based.
5. On the **General** tab, define general datasheet properties.
6. On the **Columns** tab, identify datasheet columns and column order.
7. On the **Filters** tab, set up a filter for focusing the information displayed on a datasheet.
8. On the **Organize** tab, determine how data is grouped and sorted on the datasheet.
9. On the **Time Views** tab, define the properties for the **Timeline** and **Timegrid** tabs.
10. On the **Demand vs Capacity Filters** tab, define the resource-based filters for the datasheet.
11. On the **Dashboard** tab, set up the dashboard for the datasheet.
12. Click **Save**.

Copy

As you review a datasheet that displays data in a portfolio, you may decide that you want to see the same datasheet columns, but with different data, in a different portfolio. Copying a datasheet will also copy any charts associated with that datasheet.

To copy a datasheet

1. Open the **Reports** module.
2. Select an datasheet.
3. Select the **Charts** tab.

4. Click **Copy** to copy a datasheet.
5. In the **Move/Copy** dialog box, select **Make a copy**.
6. In the **Destination** box, choose the destination datasheet for the new chart.
7. Click **Save**.

Delete

When a datasheet is no longer useful for portfolio data analysis, delete it.

To delete a datasheet

1. Open the **Reports** module.
2. In the navigation tree, right-click the datasheet you want to delete and click **Delete**.
3. Click **Save**.

Move

You can move a datasheet between portfolios. Moving a datasheet will also move any charts that are associated with that datasheet.

To move a datasheet

1. Open the **Reports** module.
2. Select a datasheet.
3. Select the **Datasheets** tab.
4. Click **Move/Copy Datasheet** to move a datasheet.
5. In the **Move/Copy Datasheet** dialog box, select the location to which you are moving the datasheet.
6. Click **OK**.

Share

Use the Datasheet Shared Access dialog box to share a private datasheet with a specific user and/or security group. When a datasheet is private, it is not viewable by anyone except the owner of the datasheet. You can create exceptions and allow some users in your organization to view a private datasheet. On the General tab of the Datasheet Properties dialog box, click **Share** to open the Datasheet Shared Access dialog box. You can filter the users that are available in the Datasheet Shared Access dialog box by selecting or de-selecting the **Users**, **Groups**, and **Unselected** check boxes under **Show**. Click **Add** to share the datasheet. Click **Clear** to stop sharing the datasheet. Only selected users and/or groups will be able to view the datasheet.

To share a datasheet

1. Open the **Reports** module.
2. Select a datasheet.
3. Right-click and select **Datasheet Properties**.
4. On the **General** tab, enable the **Private** check box and click **Share**.
5. Select the users and/or security groups to whom you want to grant access.
6. Click **Save**.

View

A datasheet can be viewed from the **Datasheets** tab in the **Reports** module.

To view a datasheet

1. Open the **Reports** module.
2. Select a datasheet.
3. In the action pane, select a snapshot from the **Data** drop-down.

Define Snapshots

Datasheet snapshots are used in each of the **Reports** module views. **Datasheets**, **Timegrid**, **Timeline**, and **Charts** tabs contain a datasheet snapshot list on the view toolbar.

Selecting a snapshot from the list on the view toolbar displays the data from the snapshot of the datasheet selected in the view and on the datasheet's dashboard (if the dashboard is set up to synchronize with the current datasheet selection). A datasheet snapshot list is available in three places: the navigation bar, the History list on generated charts, and the Chart Settings tab.

Add

Datasheet snapshots capture the data on a datasheet from a specific time period. Datasheet snapshots allow you to analyze and compare portfolio data on a datasheet from different moments in the portfolio's lifecycle to help determine its progress and health. When you schedule a datasheet snapshot, snapshots will be automatically created at the scheduled time.

To add a datasheet snapshot

1. Open the **Reports** module.
2. In the navigation tree, right-click a datasheet and click **Snapshots** to open the **Snapshots** dialog box.
3. In the **Snapshots** dialog box, select a datasheet snapshot and click **New Datasheet Snapshot**.
4. In the **New Snapshot** dialog box, name the snapshot.
5. Select **Include Timegrid Data** to include timephased data from the **Timegrid** tab in the datasheet snapshot.
6. Select **Include Timeline Data** to include milestone data from the **Timeline** tab in the datasheet snapshot.
7. Select **Include Demand vs Capacity Data** to include resource-based data from the **Demand vs Capacity** tab.
8. Under **Schedule**, select **Schedule Snapshot** to create recurring updates to the snapshot. They can be updated on a daily, weekly, or monthly basis.
9. Click **Save**.

Add w/current data

You can create datasheet snapshots that contain data that is current to the datasheet for which you want to create a datasheet snapshot.

To add a datasheet snapshot that contains current data

1. Open the **Reports** module.
2. In the navigation tree, right-click a datasheet and click **Snapshots** to open the **Snapshots** dialog box.
3. In the **Snapshots** dialog box, select a datasheet snapshot and click **Snapshot Now**.

Delete snapshot

You can remove any datasheet snapshot that is no longer needed. Once a snapshot is removed, the snapshot (and its history) will no longer be available in the snapshot list on the view toolbar throughout the **Reports** module or the **Charts** tab.

To delete a datasheet snapshot

1. Open the **Reports** module.
2. In the navigation tree, right-click a datasheet and click **Manage Snapshots** to open the **Snapshots** dialog box.
3. In the **Snapshots** dialog box, select a datasheet snapshot and click **Delete**.
4. Click **OK**.

Delete history

You can remove the snapshot history for any datasheet.

To delete a datasheet snapshot history

1. Open the **Reports** module.
2. In the navigation tree, right-click a datasheet and click to open the **Snapshots** dialog box.
3. In the **Snapshots** dialog box, select a datasheet snapshot and then select the **History** tab.
4. Click **Remove** to delete the selected snapshot or click **Remove All** to delete all snapshots. Confirm.

Schedule

You can create a schedule for capturing snapshots on an on-going basis, or capture a single snapshot of a datasheet's current data. A datasheet snapshot captures the data on a datasheet from a specific time period.

To schedule a datasheet snapshot

1. From the application toolbar, click **Setup**, and then select **System Settings**.
2. Select the **Scheduled Services** tab.
3. Select the **Jobs** tab.
4. Click **New** to add a new attribute.
5. In the **Scheduled Job Properties** section, enter a name and description for the job.
6. Select *Datasheet History* from the **Job Type** list.
7. Set the frequency, date, and time options.

8. Click **Save**.

View

Select a datasheet that contains the snapshot you want to view and click **Snapshots**.

To view a datasheet snapshot

1. Open the **Reports** module.
2. Select a datasheet.
3. In the action pane, select a snapshot from the **Data** drop-down.

Attributes

The following table provides a description for all of the fields that are available in Agile On Demand:

attribute	Description
Acceptance Criteria	The criteria to be completed before a work item can be accepted.
Accepted Effort	The amount of work (in story points or hours) that was required for the work item to be completed and accepted.
Actual Hours	The actual hours required to complete actual work.
Business Value	The business value for a work item.
Concurrency Modified By	The user name of the person (or process) who made the most recent changes to the task, task plan, or work item.
Concurrency Timestamp Date	The date and time on which the most recent concurrent changes were made to the task, task plan, or work item.
Created By	The name of the resource who initially created the task, task plan, work item, and so on.
Created Date	The date on which a task, task plan, work item, and so on, was created.
Dependency Source ID	The unique ID for the work item that is causing a dependency for another work item (the dependency target).
Dependency Target ID	The unique ID for the work item that is affected by a dependency (the dependency source).
Description	The description of a work item in the application, such as a task, work item, summary, and so on.
Dev Owner	The name of the resource who has been assigned to do the actual work related to the work item.
Dev Partner	The name of the resource who has been assigned to partner with the resource who has been assigned to do the actual work related to the work item. In Agile, this is sometimes called pair programming.
Due Date	The date by which a task or work item should be completed.

attribute	Description
Effective End Date	The date by which a task should be finished.
Effective Start Date	The date by which a task should be started.
Estimated Effort	The amount of effort, measured in story points, required to complete all of the work associated with a work item.
Estimated Hours	The amount of effort, measured in actual hours, that are required to complete all of the work that is associated with a work item.
Goal	The goal of a release, sprint, task plan, task, or other interval.
Impediment Owner	The name of the team member who is responsible for resolving any issues related to an impediment.
Interval Capacity	The total number of story points that have been planned for an interval.
Interval End Date	The date on which an interval is scheduled to end.
Interval Start Date	The date on which an interval is scheduled to begin.
Item ID	The unique ID for the work item.
Item Type	The type of work item. If the work item is task-based, then the list will contain task-based work item types. If the work item is activity-based, then the list will contain activity-based work item types.
JiraFilter	The name of the JIRA filter.
JiraId	The unique ID for a JIRA defect as it is actually identified in the JIRA repository. For example, DEF-001277.
JiraLink	The link to a JIRA defect in the JIRA repository. For example, http://jira.aod.com/defect/001277 .
JiraProject	The name of the project in JIRA in which the JIRA defects that are associated with this project are contained.
JiraStatus	The current status of the JIRA defect.
Last User Modified By	The user name of the person who made the most recent changes to the task, task plan, or work item.

attribute	Description
Last User Modified Date	The date on which the most recent changes were made to the task, task plan, or work item.
Name	The name of a task (or a task plan).
Owning Investment Name	The name of the investment or interval to which a work item belongs.
Owning Item	The work item which belongs to an investment or to an interval.
Parent	The parent of a work item.
Parent ID	The unique ID for the parent task.
Priority	Indicates the importance of the task in relation to other tasks. Values range from 1-5.
Product	The name of the product.
Product ID	The unique ID for the product.
Product Owner	The name of the product owner who has been assigned to approve the work related to the work item.
QA Owner	The name of the tester who has been assigned to do validate the quality of the work related to the work item.
Release	The name of the release.
Release ID	The unique ID of the release.
Remaining Effort	The amount of effort, measured in story points, required to finish all of the remaining work associated with a work item.
Remaining Hours	The amount of effort, measured in actual hours, that are required to finish all of the remaining work that is associated with a work item.
Repro Steps	The steps by which a defect can be reproduced by other members of a team.
Resource Address1	The address for the location in which a resource is located. Resource Address1, Resource Address2, Resource City, Resource State, and Resource Zip Code are used together to define a resource's complete address.

attribute	Description
Resource Address2	The place for additional address information, if needed, for the location in which a resource is located. Resource Address1, Resource Address2, Resource City, Resource State, and Resource Zip Code are used together to define a resource's complete address.
Resource Allocation Skill Set	The skills that a resource is required to have in order for them to be allocated to this work item.
Resource Alternate Name	The alternate name for a resource, such as a nickname.
Resource City	The city in which a resource is located. Resource Address1, Resource Address2, Resource City, Resource State, and Resource Zip Code are used together to define a resource's complete address.
Resource Email	The email address of a resource.
Resource First Name	The first name of a resource.
Resource IsInactive	Indicates whether a resource is an active resource. An active resource must have an application license.
Resource Last Name	The last name of a resource.
Resource Primary Skill Set	The name of the skill to which a resource is most often associated.
Resource Primary Skill Set ID	The unique ID of the skill to which a resource is most often associated.
Resource State	The state in which a resource is located. Resource Address1, Resource Address2, Resource City, Resource State, and Resource Zip Code are used together to define a resource's complete address.
Resource Type	The type of resource.
Resource User ID	The unique ID for the resource.
Resource Username	The username of a resource.

attribute	Description
Resource Zip Code	The zip code in which a resource is located. Resource Address1, Resource Address2, Resource City, Resource State, and Resource Zip Code are used together to define a resource's complete address.
Risk	The name of the risk.
Sprint	The name of the sprint.
Sprint ID	The unique ID for a sprint.
Task State	The state of a task.
Task Status	The current status of a work item, task, or project.
Team	The group of individual resources who comprise a SCRUM team, typically a single product owner, several engineers and testers, and (occasionally) other resources, such as support, documentation, and sales.
Team Dev Lead	The name of the individual resource who is the engineering lead responsible for the team that performs the actual work related to any work item completed in the sprint.
Team ID	The unique ID for the group of resources who comprise a SCRUM team.
Team QA Lead	The name of the individual resource who is the quality assurance lead responsible for ensuring that any work item completed in the sprint are done to the quality standards expected by the team.
Team Scrum Master	The name of the individual resource who lead an Agile team during a sprint, including running daily standup, tracking velocity, and dealing with impediments that may have been identified by team members.
Team Velocity	The total number of story points that represents the team's velocity for the sprint.
Technical Notes	The information about this work item that has been entered by team members.
Theme	The name of the theme that is associated with a work item.

attribute	Description
Traffic Status	The current, overall status of the project. In Agile, simple colors (much like a traffic light) are used to convey the current status of the project. Use red for blocked, yellow for partially-blocked, and green for not blocked. For example, if the nightly build failed or if a certain number of automated tests failed, then the traffic status may be yellow (indicating that people need to look at the nightly build reports and work quickly to address the build issues). Or, if the nightly build has failed for two or more consecutive days, then the traffic status may be red, indicating that all available persons should work together to find a resolution.
User Assigned To	The name of the resource to whom a task or work item has been assigned.
User Assigned To ID	The unique ID of the resource to whom a task or work item has been assigned.
Work State	The current state of a work item, such as Not Started, In Development, In Testing, Ready for Review , and Accepted .
Work Status	Indicates whether a work item is blocked.