## Launching the Agile Team Tool

Launch the Agile Team Tool using the following URL:
http://ibm.biz/AgileTeamTool

- Enter your IBM w3**id** and password

## Navigation

**Main Page:**
When you log into the tool, you will see the screen is divided into three sections of information.

1. The left section is for Team Navigation, consisting of 2 views; 'My Teams', those teams you have edit access for and 'All Teams'. The navigation section shows teams entered in the tool, with indentions indicating 'parent' and 'child' relationships. Squad teams, which cannot have child teams, are indicated by a special icon, .
2. The center section shows information about the team selected. Iteration Trends (graphs) are displayed in this section as well as trends for any submitted maturity assessments.
3. The rightmost section is where Iteration Results are entered for Squad Teams. Users with edit access can create and modify iteration information in this section. Information entered here is used to generate the 'Iteration Trends' in the center section.

- Help – Located in the upper right corner of the page, you will find links to documentation, help aids, links to our Connections Community and the Feedback functionality.

## Creating a New Team

1. In the left column, in the 'My Teams' or 'All Teams' view, click on the 'Create New Team' icon in the top right of this column.
2. A pop up window appears for you to enter the name of the team and a team description.
3. Enter the required information and click on 'Next'. (If the team name you entered is already in use you will receive a warning message.)
4. In the next pop up, choose to create a Parent team or a Squad team.
5. If creating a Parent team, make the appropriate selection and click on 'Next'. Go to step 7. Otherwise, go to step 6.
6. If creating a Squad team, make the appropriate selection and click on 'Next'. Go to step 20.
7. You are presented with the Parent/Child team hierarchy screen.
8. Select a parent team from the drop-down selection. If the team you are creating will not roll up to another team or it has not yet been created you can skip this step or select the option for 'Top tier / Not Listed'.
9. Select any children teams that may roll up to the one you are creating from the drop-down selection. If the child team has not yet been created or you don't know the name you can select 'Not Listed'.
10. Click on 'Next'.
11. The Add Team Members screen appears. You will notice that your name is added by default as a team member when you create the team. You will NOT be allowed to remove your name until you have added at least one additional team member to the list. There must be at least one member on the team so that someone can make updates to this team.
12. Enter the name(s) of the team member(s) to be added and select the person from the list provided as you type in the name. (Do not paste a name in the search box.)
13. The names are added to the list as you select them.
14. When all names have been added click on 'Next'.
15. The member roles and allocation screen appears.
16. Select the role for each team member and whether the member works a full time or half-time work week or some % thereof. (This selection is used to determine the number of person days the team has available for the iteration/sprint.
17. Once all team members have been updated click on 'finish'.
18. You should receive a confirmation message that you have successfully added your team. Click OK.
19. Your 'My Teams' view should refresh and display the new team you just created. (If you removed yourself from the member list it will not show in the 'My Teams' view but should appear in the 'All Teams' view.)
20. When you indicate that a squad team is being created you are presented with the option to select a parent team using a drop-down selection. If the parent team has not yet been created or you don't know the name you can leave this blank. If no parent team is selected, you will be setting this team up as a standalone team.
21. Go to steps 11-19 and complete the team setup. Repeat the process for each team you are establishing in the Agile Team Tool.

## Update an Existing Team

**Updating the team name or description:**

1. With the team selected in the team navigation section, click on the Team Description icon and click on Edit.
2. Make your changes as appropriate.
3. Click on Save.

**Updating the parent team association:**

1. With the team selected in the team navigation section, click on the Team Setup icon.
2. Using the drop-down list, select the new parent team for your team.
3. Click on 'Save Changes'

**Archiving a team (Squad teams ONLY):**

1. With the team selected in the team navigation section, click on the Team Setup icon.
2. Click on the 'Archive' button.
3. A confirmation warning message is presented.
4. Click on 'Archive.

**Deleting a team:**

1. With the team selected in the team navigation section, click on the Team Setup icon.
2. Click on the 'Delete Team button.
3. A confirmation warning message is presented.
4. Click on 'Delete'.

**Updating the Important Links (Bookmarks):**

1. With the team selected in the team navigation section, hover your mouse pointer over the 'Team Bookmarks' icon.
2. Click 'Add new link'.
3. Select a label for the bookmark from the selection list, paste in or add the URL.
4. Click Save.
5. To make changes to an existing bookmark, hover over the link and click the 'Edit Bookmark' icon (pencil). Make necessary changes to the label or URL and click Save.
6. You can also click on the 'Remove Bookmark' icon if you want to delete the bookmark all together.

**Adding/Deleting Team Members:**

1. With the team selected in the team navigation section, hover your mouse pointer over the 'Team Members' icon.
2. The Team Details window appears.
3. Click on Add Team Member
4. Follow the prompts to enter the name, role, allocation %, etc. and click on 'Add'.
5. To edit an existing team member, hover over the team member and then change the appropriate field or value, i.e role, allocation, etc.
6. Close the Team Details window.

## Entering /Updating Iteration Information

1. Select an existing squad team from the team navigation section.
2. If this is the first iteration entered in the Agile Team Tool for this team click on 'Start the first iteration' in the Iteration Overview section in the right most column or section of the main page.
3. A pop-up window appears where you enter the Iteration Name, start/end dates, etc…
4. You can also decide how future iterations are created by selecting various options from this window.
5. Click on 'Add'.
6. A confirmation message appears that the iteration was created.
7. You can choose to enter the number of committed stories and/or story points after the iteration planning or you can enter those values at the end of the iteration.
8. Information about each of the fields can be displayed by holding your mouse pointer over each of the fields. Helpful flyover text will appear for each field.
9. At the end of the iteration, return here and enter the values for all relevant fields for your team that were delivered.
10. The trends charts will display your inputted values once the current date is greater than or equal to the iteration end date when delivered results are entered for the iteration.

## Creating/Updating a Maturity Assessment

**Creating a new Assessment**

1. Select an existing squad team from the team navigation section.
2. If this is the first assessment for your team, click on 'Let's get started' in the center column of your main page in the Agile Maturity Overview section and go to step 4.
3. If this is NOT the first assessment click on the 'Create New Assessment' button.
4. If you selected a team for which you do not have edit access these buttons will be grayed out indicating you must be a team member to submit or edit an assessment.
5. You can view an existing assessment for this team but you cannot create one and you will not be able to make updates to the action plan.
6. The Agile Maturity Team Assessment window will appear.
7. Identify the type of work your team does from the drop-down list. Read the explanation for each question and make the appropriate selection for your team.
8. Indicate whether your team delivers software or not. (If you select, Yes, you will be prompted to take the Delivery portion of the assessment.)
9. Select an assessment date from the date override section if entering assessment data for an assessment in the past; otherwise, let this default to the actual date of the assessment submission.
10. The appropriate 'Team Maturity Assessment' is displayed based on your selections above. Scroll down the list of agile principles/practices and indicate the maturity level of your team by clicking the appropriate radio button in the 'Current' column.
11. Once you have selected your team's current maturity level, select the appropriate radio button under the 'Target' column to indicate where you want to be by the time you take the next assessment; approx. 90-120 days.
12. For each practice, you have the option to enter an action plan item on how the team can get better.
13. Complete all sections and click the 'Submit' button when finished. You can click on the 'Save as draft' button at any time and return later to complete your assessment.

- Once submitted, you will see your action plan items at the bottom of the Team Assessment Summary page with the ability to add additional items.
- Here you can track your progress and close them as they are completed.

## Additional Notes

- You must be a team member or a member of a team's parent team to have edit access for a team; otherwise, you have read-only access to a team.
- A Squad Team is the lowest level team in the Agile Team Tool hierarchy, i.e. Level 1
- Squads normally report up to a Tribe (Level 2), but it can also be directly associated to a Level 3 or Level 4 team.
- Tribes report up to a Sub-Domain; Level 3 (CIO statement).
- Sub-Domains report up to a Domain; Level 4 (CIO statement).
- Team members can be on multiple teams.
- A person can be on the team member list more than once, i.e. two different roles at different allocation % but will only be counted once in the team member count.
    - Individuals added to the team member list at 0% allocation are NOT counted in the 2-Pizza rule chart as part of the 'core team
- A parent team can have multiple teams underneath it but a team (squad or parent) can have ONLY one parent.
- Only squad teams can be archived.

For more detailed information, with screen shots, please refer to the Agile Team Tool User Guide.

# Agile Team Tool Quick Reference

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