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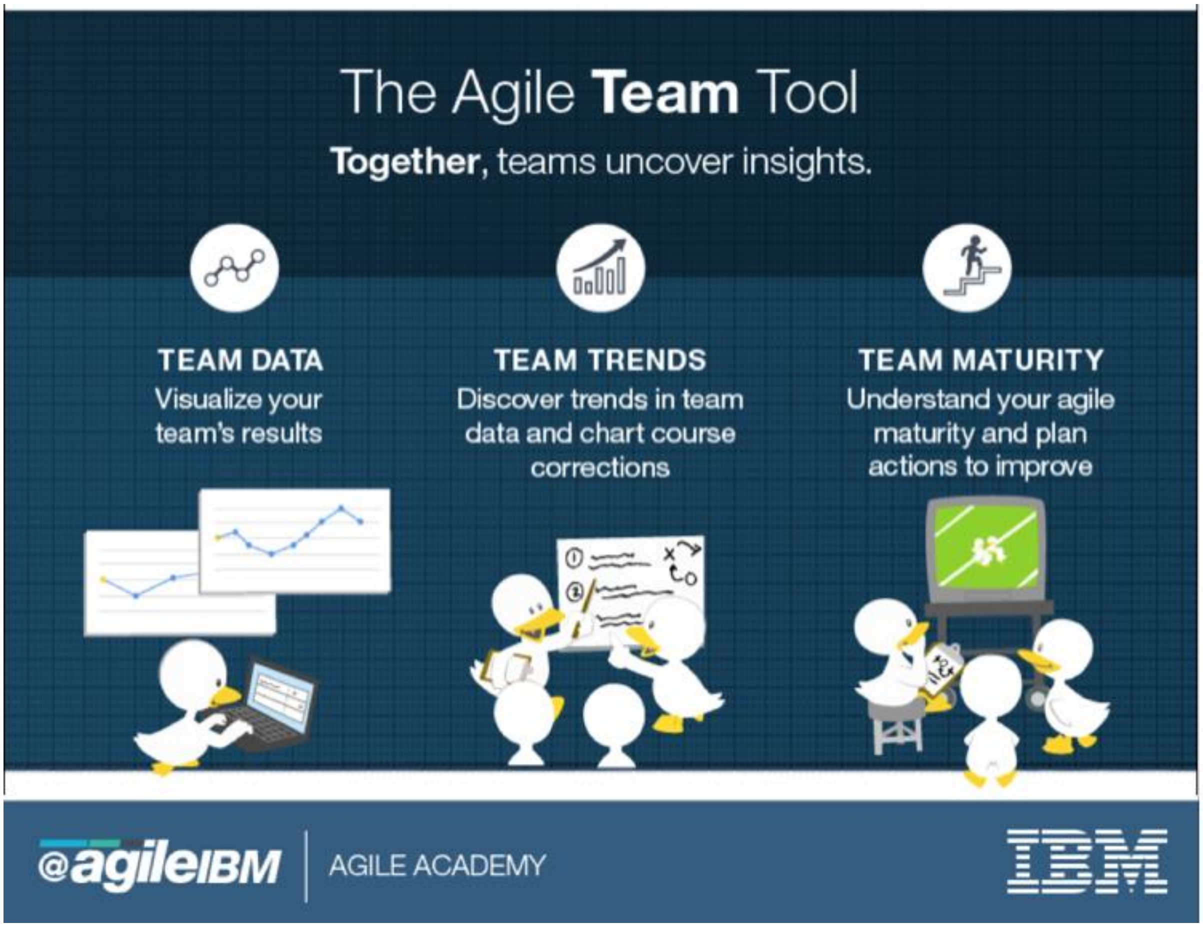

User Guide

The Agile Team Tool is a web app that enables teams to track and analyze progress on their Agile Journey. The application offers a range of features from visualizing team data to understanding a team's overall Agile maturity. The Agile Team Tool can be used by all types of agile teams. This user manual will provide step-by-step instructions on how to use the features of the tool.

June 24, 2016
IBM Internal Use Only

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INTRODUCTION

Our CIO, Jeff Smith, often reminds us that "to evolve our Agile Culture we need to look at how we form our teams, how we distribute the work and how we measure what matters." The Agile Team Tool has been designed to help squad teams measure what matters by:

- visualizing and sharing agile team results,
- analyzing trends over time, and
- making course corrections needed to improve agile practices.

Depending on the type of work your squad performs, you will enter data about your team; team member names and roles, stories or story points delivered, number of deployments and defects, team and client satisfaction scores and your squad's agile maturity. These measures are typically entered into the tool at the end of each iteration

The iteration results are displayed in a series of graphs on the Home Page of the tool showing trends from one iteration to the next. Squads will use the trended data to track their agile progress and plan actions to get better.

This user guide will provide not only how-to instructions, but guidelines for the measures included in the tool. Based on those guidelines, each squad can decide which measures best fit their type of work and stage of maturity. But, each squad is expected to track their progress, analyze their results and continually improve their agile practices.

WHAT ARE WE MEASURING AND WHY

Measure	Aggregated
Size of Team (FTEs) per iteration	**Yes**
Role gaps* – Roles needed in a team but not filled	No
Agile Maturity	**Yes**
Velocity – No of units (Story Points) <u>Delivered</u> **OR** ***Throughput*** – No of units (Stories/Tickets/Cards) <u>Delivered</u> (Note: Delivered Units are aggregated to tribe, sub-domain, domain, etc..; Committed Units are not aggregated - used for squads only). Squads will record either Velocity OR Throughput	**Yes (delivered)** No (committed)

No of deployments per iteration Deployment = Code drop to production	**Yes**
Quality Measures ***Open bug fixes*** (defects) per iteration Team selected quality measures (non-defect) for team use*****	**Yes (defects)** No (non-defect)
Average Cycle Time per story* Time from out of backlog to production ***Average Backlog Cycle Time**** Time Story added to backlog until pulled into WIP	**Yes**
Unit Cost per Story or Story Point No of people / Stories or Story Points Delivered	No
Team Satisfaction – (1-4 based on Mood Marbles)	**Yes**
Client Satisfaction – (1-4) collected during Showcase	**Yes**

*not currently in the tool

WHY THESE MEASURES MATTER

Tracking these measures helps agile squads manage their funnel of work and continually get better by answering:

- Do I have the right number of people and the right skills on my squad? (team size, role gaps);
- Are the squad's agile practices improving? (maturity)
- Do I know the capacity of my squad so I can plan my releases and iterations? (velocity or throughput, number of deployments and defects)
- Does the funnel have the right work and is it flowing through the funnel in a reasonable time frame? (Average cycle time per story, average backlog cycle time)
- Do I understand the cost of the work so I can estimate the cost and benefit? (Unit cost per story or story point)
- Is my squad happy and working well together? (team satisfaction)
- Are we meeting client expectations (client satisfaction, quality)?

OBJECTIVES

After reading this document you should be able to:

1. Launch and navigate all sections of the Agile Team Tool.
2. View team information in the tool.
3. Create a new agile team record.
4. Update an existing team record.
5. Create and update iteration results for your squad team.
6. Enter an Agile Maturity Assessment for your team

Comments regarding this publication and its use should be addressed to Bruce Fouts via Lotus Notes at Bruce Fouts/Atlanta/IBM@IBMUS or via the internet at bfouts@us.ibm.com.

LAUNCHING THE AGILE TEAM TOOL

All users with an IBM w3**id** and password can access this tool in 'Read Only' mode. All members of a team have edit access for that team.

The Agile Team Tool is an internet browser application which can be accessed by clicking on the following URL:

http://ibm.biz/AgileTeamTool

- If presented with any security exception notices, please accept and add the security certificate.
- Enter your IBM w3**id** and password.
- The 'Home' tab will display. (See Figure 1)

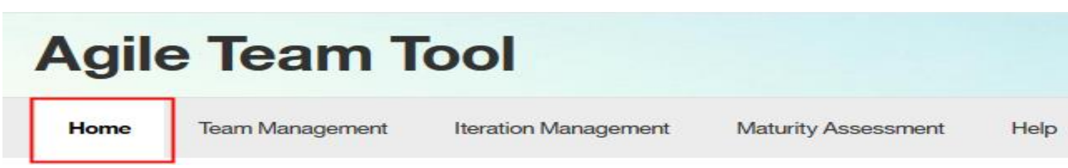


Figure 1

BASIC WORKFLOW OF THE AGILE TEAM TOOL

1. Create your team(s).
2. Add your team members.
3. Associate your Squad team(s) to a ‘parent’ or to a ‘child’ if creating Non-Squad teams.
4. Add iteration information; squad teams only.
5. Track your team’s progress in the Iteration trends area of the home page; make course corrections, as needed.
6. Record periodic maturity assessments for your team.
7. Track actions to improve agile maturity practices.

NAVIGATION

When you first come into the tool, you will see multiple tabs or titles across the top of the page. Logging in will always take you to the **Home** page.

1. Home

- This page has two views; My Teams and All Teams.
- 'My Teams' displays only those teams you have edit access for (you are a member).
- 'All Teams' displays all teams entered into the tool.
- The left column shows all team names that have been entered, with a series of twisties and indentions indicating 'parent' and 'child' relationships. Squad teams, which cannot have child teams, are indicated by a red asterisk*.
- You will also notice two selections that allow you to Expand all or Collapse all for ease of navigation in both the 'My Teams' and 'All Teams' view. (See figures 2A and 2B.)

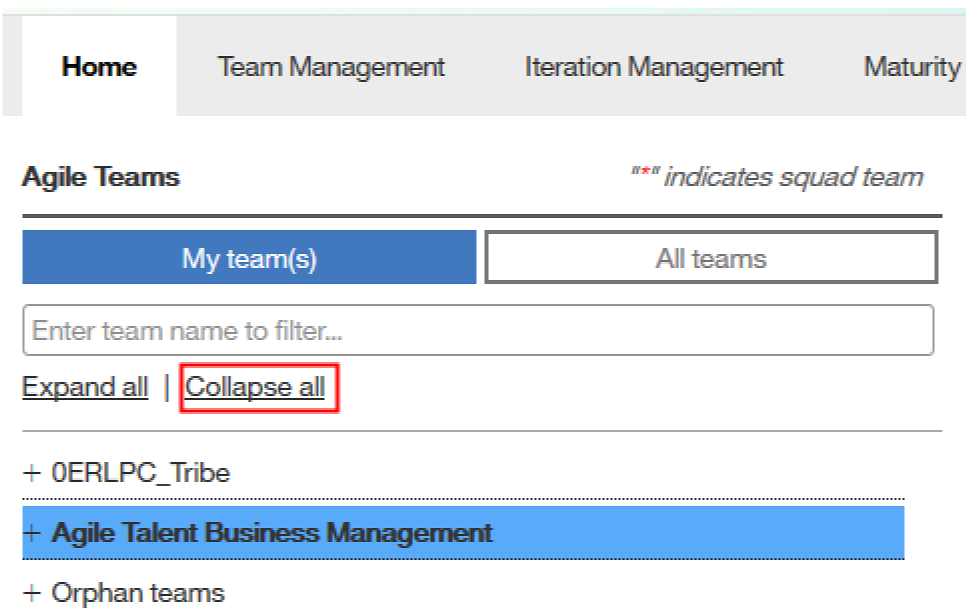


Figure 2A

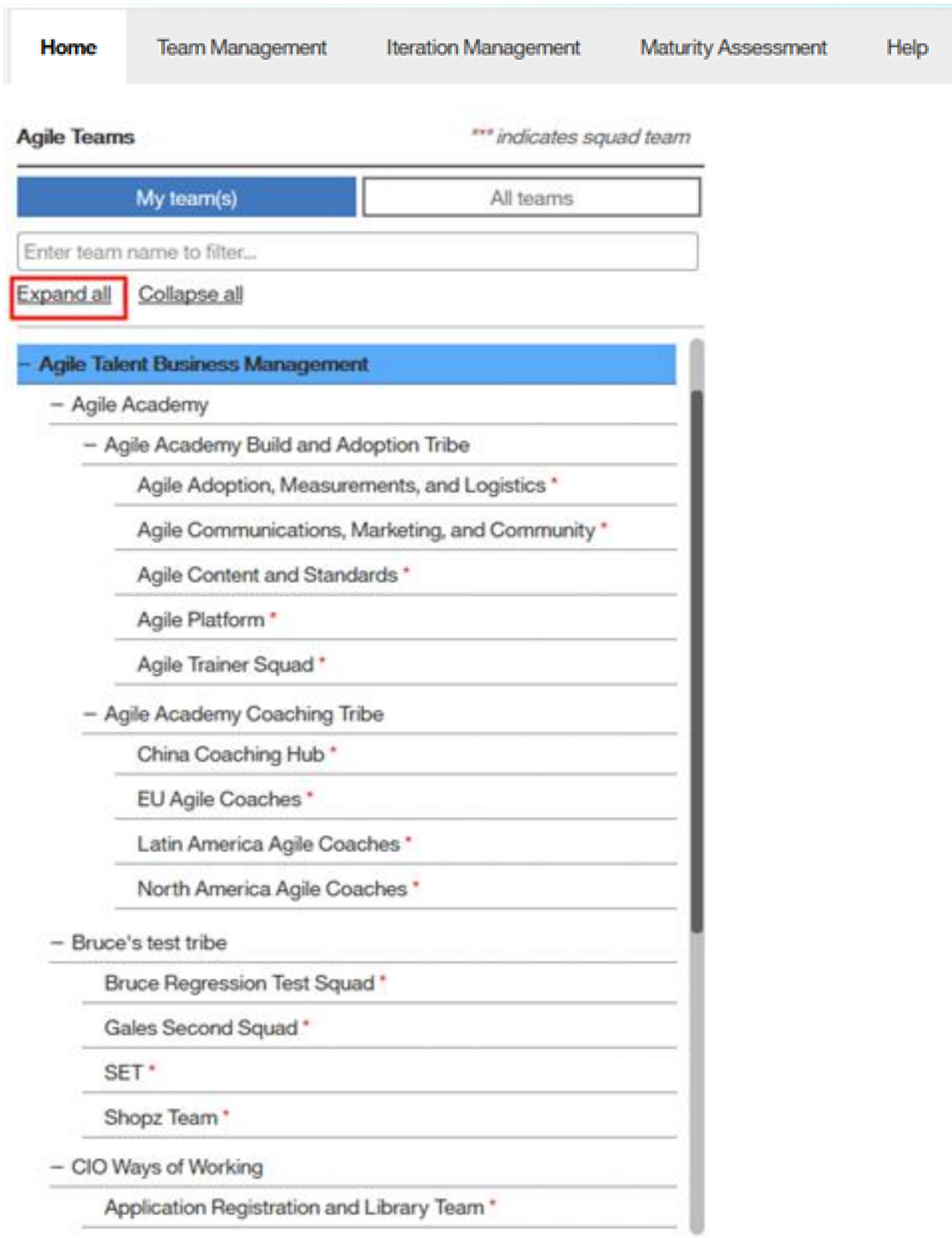


Figure 2B

- The right side of the page shows information about a selected team including:
  - Iteration trends shown in a graphical format.
  - Maturity assessment trends shown in a graphical format.
  - Team Information.
  - Team Members.

More detail about this section can be found under Displaying Team Information.

2. Team Management

- Users can create new teams, delete teams and/or modify existing team information on this tab using the following guidelines:
  - Anyone can create a new team.
  - If you are listed in the team member list, you have edit access for that team.
  - If you are listed in the team member list of a parent team, you have edit access for that team and all child teams under that parent.
  - A Squad team (Level 1) is the lowest level team, it can only have a 'parent' team, no 'child' teams.
  - A team can only have one parent team.
  - A parent team can have multiple child teams.
- Team + Team membership membership
  - Team members are added, removed and updated here.
  - Updates can be made to the allocation % and team roles for each member.
- Parent and Child association + Parent team association + Child team association
  - Parent association: Parent teams can be associated with child teams here.
  - Child association: Squads can be associated to Parent teams here. (Remember, squad teams cannot have a child association)
- Iteration identifiers with the Start & End Date can be viewed here + Iteration information with the ability to create a new iteration.
- Maturity Assessment dates can be viewed here + Assessment information with the ability to launch a new assessment.

More detail about this section can be found under Creating / Updating / Deleting Teams

3. Iteration Management

- Iteration results such as iteration start and end dates, committed stories or story points and velocity or throughput, deployments, defects are recorded
- Team satisfaction and client satisfaction are recorded
- Information entered on this page is used to generate the Iteration trends shown as graphs on the Home page.
- Users with edit access can create and update iteration information for squad teams.
- If you are listed in the team member list of a parent team you will have edit access to all child teams under that parent.

More detail about this section can be found under Entering / Updating Iteration Information

4. Maturity Assessment

- If you have edit access for a given squad team (you are a member), you can launch a new maturity assessment for that team.
- From this page you can also view previously submitted assessments for <u>any</u> given team.
- Once you select a team, you will be able to choose between two views on this page; Team Maturity Assessment and Team Assessment Summary.

More detail about this section can be found under Entering / Viewing an Agile Maturity Assessment

5. Help

Help documentation and links to our Agile Team Tool web page and Connections Communities (Agile Academy, etc.) can be found under this tab. (See figure 3)

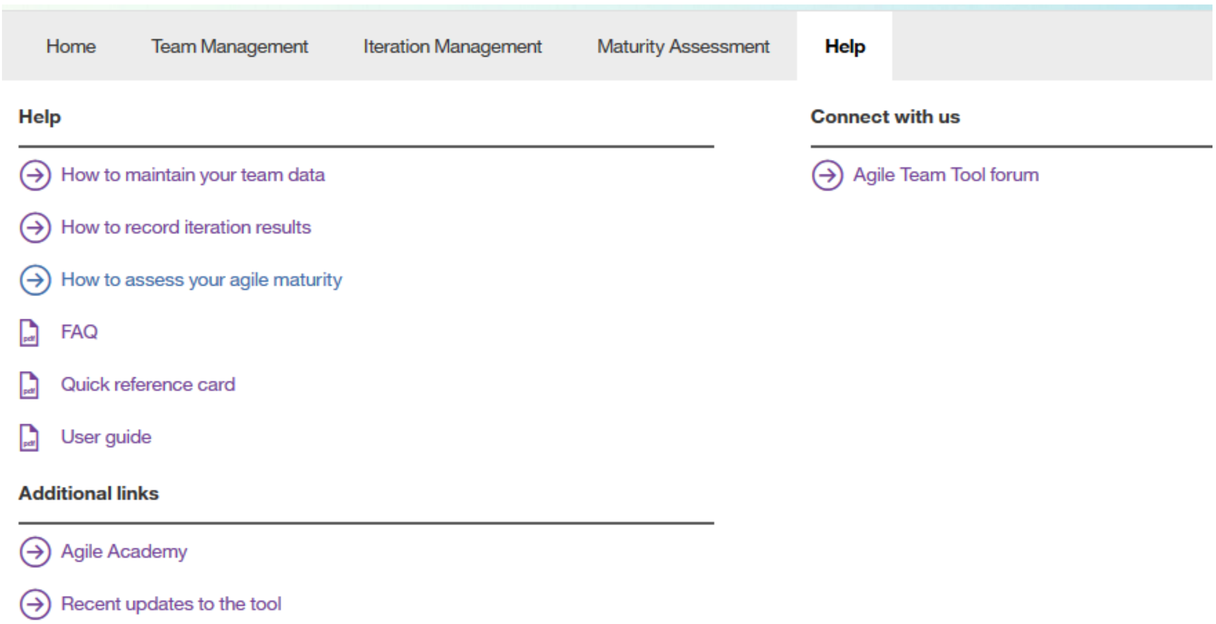


Figure 3

We also provide the ability to provide feedback to the development team regarding a defect or problem with the tool by clicking on 'Feedback' in the upper right corner of each page. (See figure 4)

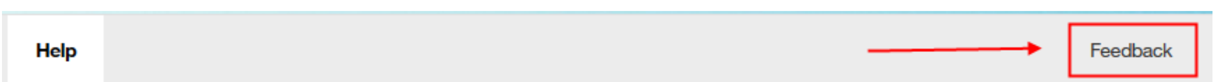


Figure 4

A popup window appears for you to enter your feedback and copy others using the cc: field. (See figure 5)

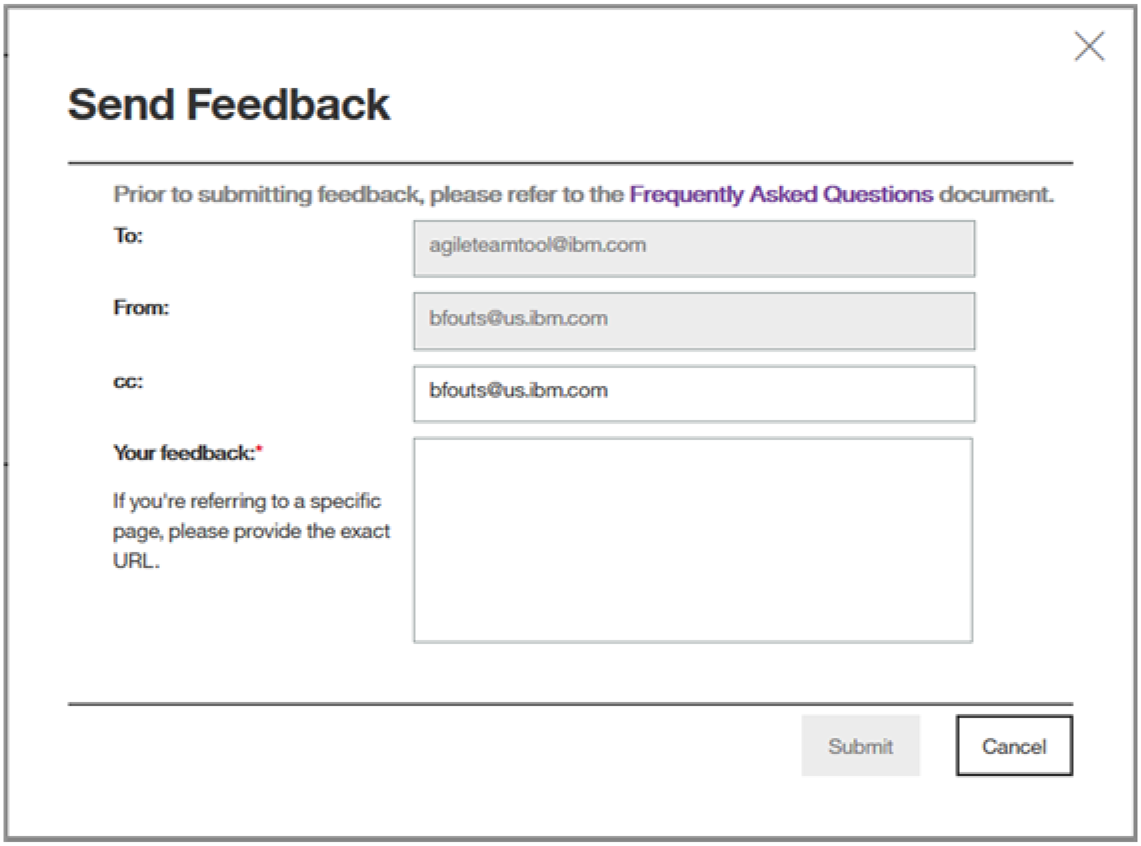


Figure 5

DISPLAYING TEAM INFORMATION

1. Click on the 'Home' tab at the top of the page. This 'home' page summarizes the results for a squad in graphical form and enables users to link to details about iteration results and maturity assessment results. Also, by selecting a 'parent' team, you can see aggregated data for that parent team or group of associated teams.
2. In the Agile Teams column on the left side, select the team you want to view. (Remember, you will have to select the 'All Teams' view for any teams that you are not a member.)
3. Iteration trends and other information about this team will be presented on the right hand side of the page. A sample of the iteration trends are shown below in figure 6.
4. You can hover over each of the data points to see flyover information about each of the data points.
5. To see details for a specific iteration, select the identifier from the go to iteration field and click 'Go'.
6. You can create a new iteration from the home page by clicking the 'Create iteration' button. It will take you to the iteration management tab.
7. At the bottom of the page, you can see a summary of the selected squad information including team name, description, team members, roles, allocation and associated parent team.

Figure 6

CREATING / UPDATING / DELETING TEAMS

1. Click on the 'Team Management' tab at the top of the page. (See figure 7)

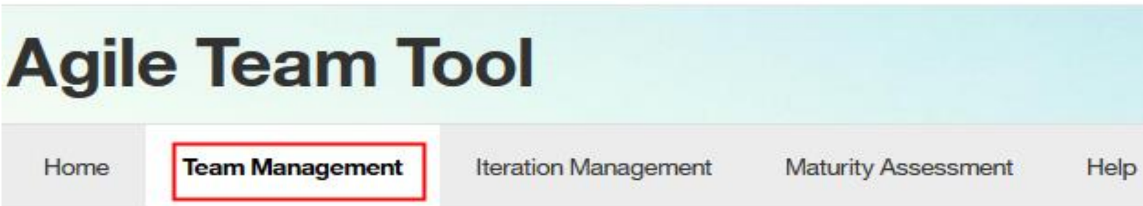


Figure 7

2. Select 'Create new..' or select an existing team from the pick list if updating. (If creating a new team and the team name is already being used you will receive a message to use a different name.)
3. If you select a team for which you do not have edit access (you are not a member), you will see the "International No' symbol when you mouse over the editable areas and the fields will be grayed out. An informational message will also appear to the right of the team name indicating you must be a team member to have edit access. (See figure 8)

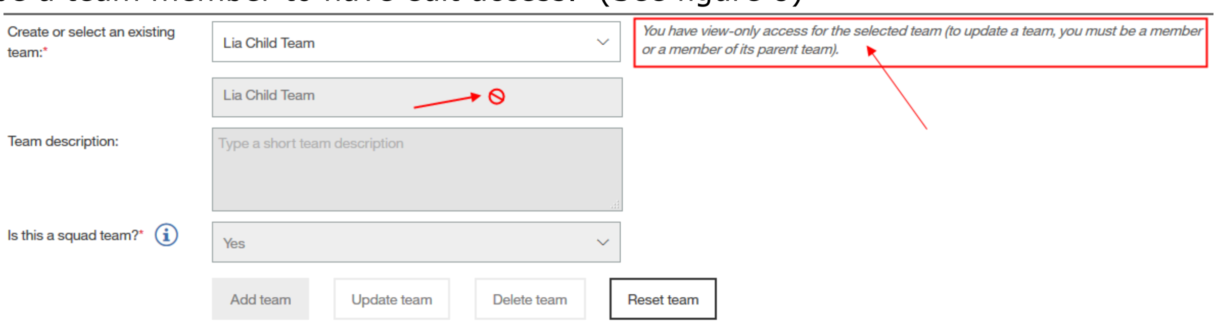


Figure 8

4. Enter / Update the team name and short team description (optional, but desired) in the Team description field.
5. Indicate whether this is a Squad team by selecting 'Yes' or 'No' from the pick list.
6. Click the 'Add team' or 'Update team' button as appropriate.
7. If adding a new team, you will see a message indicating the team was created and you were added as a team member.
8. A series of collapsed sections will appear at the bottom if this is a new team, or is already visible if you are updating a team. (See figure 9)

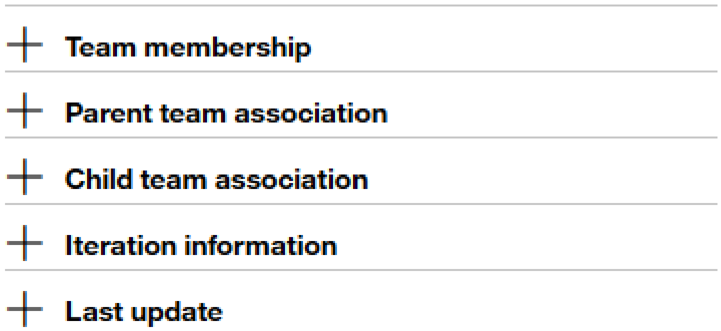


Figure 9

The steps below will walk you through how to enter team information for each of these collapsed sections.

9. Click on Team membership. 

10. You can see that your name was automatically added to the team member list with 0% allocation as an Iteration Manager when creating a Squad Team or as a Team Leader when creating a Non-Squad Team.

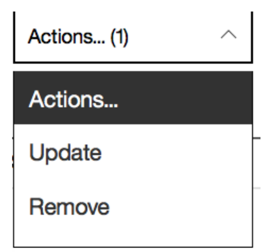
11. Enter the names of your team members.

12. Select a role from the pick list and enter the amount of time this person is allocated to this team.
    - If the role you are looking for is not listed select 'Other' at the bottom of the list and enter the new role in the field provided.
    - If no value is entered for the allocation, it will default to 0%.

13. Click the 'Add / Update team member' button as appropriate.

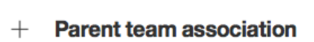
14. The Team membership list is updated.

15. You can remove a team member by clicking the checkbox beside person's name in the membership list and selecting Remove from the Action dropdown.

    Warning: Do NOT remove your name until you have added at least one additional team member to the list. Failure to do this will result in nobody being able to make updates to this team.

16. Repeat steps 11-13 until all of your team members have been added/updated.

17. Click on Parent team association. 

18. Select a 'parent' from the pick list. If you do not see your parent team listed select 'no parent team'. This association can be performed once the parent team has been added.

19. Click the 'Associate team to a parent team' button.
20. Click on Child team association. + **Child team association** Assuming you are creating or updating a non-squad team, select a 'Child' team from the pick list. If you do not see your child team in the pick list, either the child team has not yet been entered into the tool or it is already associated to another parent team.

    If the child team has not yet been entered into the tool, this association can be performed once the child team has been added to the tool. If the child team has been entered into the tool see Note 2 below.

    – Note 1: This option is not available if you are creating or updating a Squad team. Squads are the lowest hierarchical team in the Agile Team Tool and cannot have children under them.
    – Note 2: Someone with edit access for the child team should go to the team management area for the child team and remove the current parent association and select the proper parent.
21. Click the 'Associate team to a child' button.
22. Click on Iteration information. + **Iteration information** Once entered into the tool, this section displays the last five iteration names with the start / end date and hot links to each iteration. To view older iterations click on → More.. at the bottom of the section. You will also see a button to create a new iteration as needed.
23. Click on Assessment information. + **Assessment information** Once entered into the tool, this section displays the last five maturity assessment dates and hot links to each assessment. To view older assessments click on → More.. at the bottom of the section. You will also see a button to create a new assessment as needed.
24. The 'Last Update' section + **Last update** displays the IBM w3**id** and timestamp of the last person having updated this record. This timestamp is the server time which is the US Eastern Time zone.

DELETING A TEAM

1. Click on the 'Team Management' tab at the top of the page. (See figure 7)
2. Select the team to be deleted from the pick list. You MUST have edit access to delete a team.
3. Click the 'Delete team' button. (See figure 10)

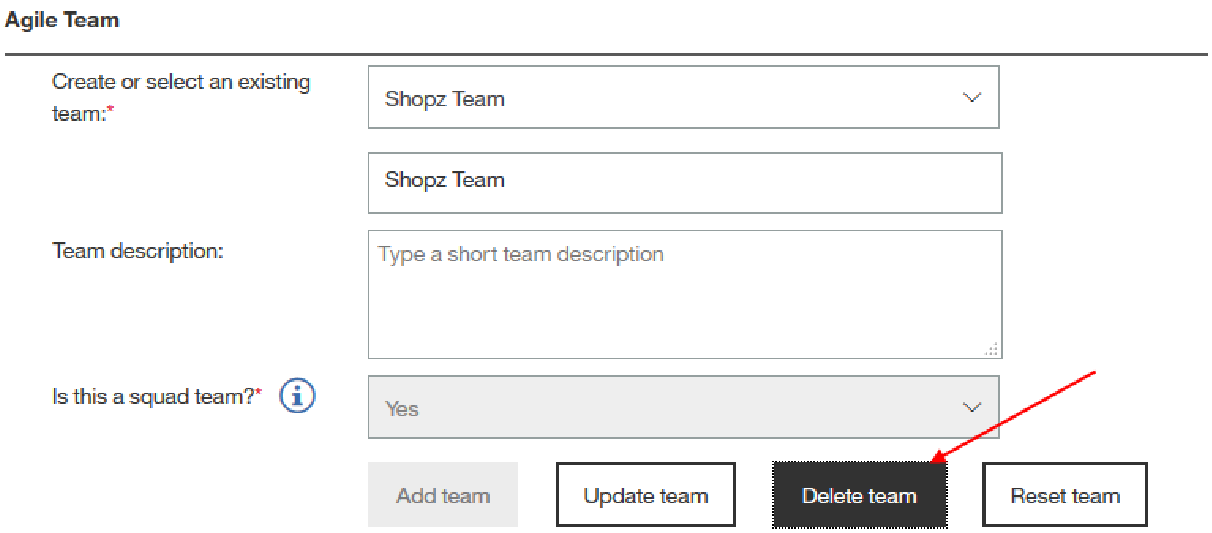


Figure 10

4. You will receive an informational message showing you any parent and/or child associations this team may have as well as any iteration results and maturity assessments entered for this team. (See figure 11)

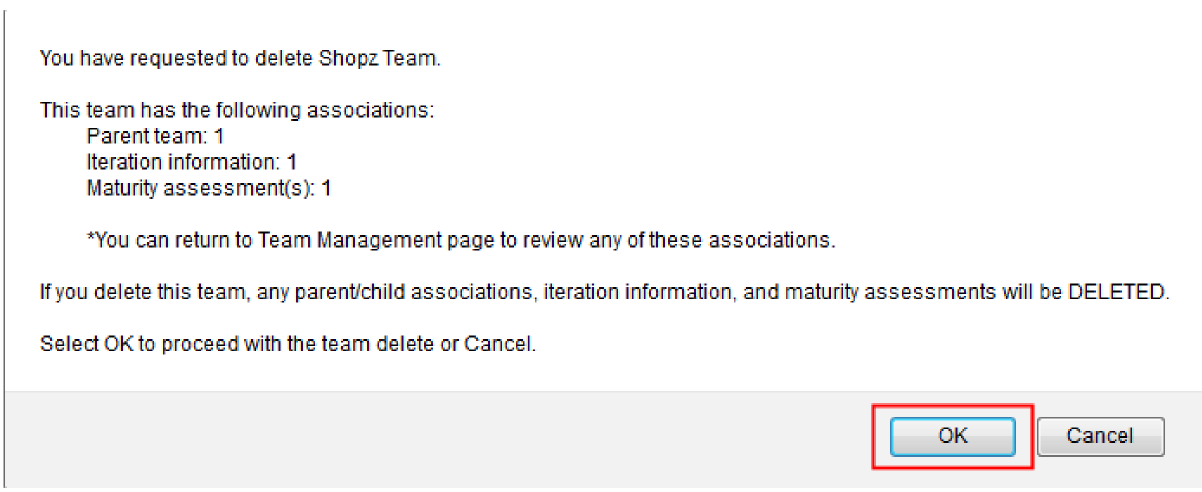


Figure 11

5. Click on OK to proceed with deleting this team, and its information, from the tool or click Cancel.
6. A confirmation message appears indicating the team was deleted.

ENTERING / UPDATING ITERATION INFORMATION

1. Click on the 'Iteration Management' tab at the top of the page. (See figure 12)

Figure 12

2. Select an existing team from the pick list. If you know the team name you can start typing it in and teams matching your entry will be displayed.
3. If you select a team for which you do not have edit access, you will see the "International No' symbol when you mouse over the editable areas and the fields will be grayed out. An informational message will also appear to the right of the team name indicating you must be a team member to have edit access. (See *figure 8)*
4. Select 'Create New' from the pick list and go to step 5. If you are updating previously entered information, select the proper iteration from the pick list and go to step 6.
5. Enter your iteration number and the Start / End Date for this iteration.
6. Enter the number of committed stories and/or story points depending on the type of team you have. (Some teams commit stories and not story points.)

Guidance:

- *If your squad tracks stories, tickets or cards, enter or update committed stories OR*
- *If your squad estimates story points, enter or update your committed story points.*
- *If your squad does end to end activities (for example project and operations work), then enter committed story points for all work.*

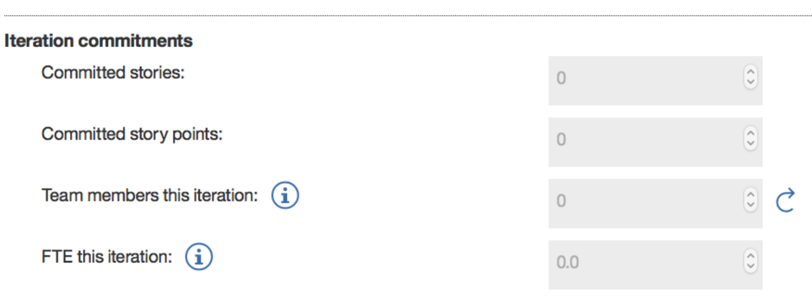


Figure 13

7. The team member count Team members this iteration: is pre-populated from the Team Information section on the Home page. You can change this value if appropriate for this iteration (for example, a temporary team member was added for this iteration or team members were on vacation).

   If you change this value, you might want to consider updating the team membership fields in the team membership tab.

8. The FTE (Full Time Equivalent) value FTE this iteration: is also pre-populated from the Team Information section on the Home page. You can change this value if appropriate for this iteration.

   Like the team member count, if you change this value, you might want to consider updating the team membership fields in the team membership tab.

9. At the end of the iteration, enter the number of stories and story points actually delivered.

   Guidance:

   - *If your squad tracks stories, tickets or cards, enter or update THROUGHPUT (delivered stories) OR*
   - *If your squad estimates story points, enter or update VELOCITY (delivered story points).*
   - *If your squad does end to end activities (for example project and operations work), then enter VELOCITY (delivered story points) for all work.*

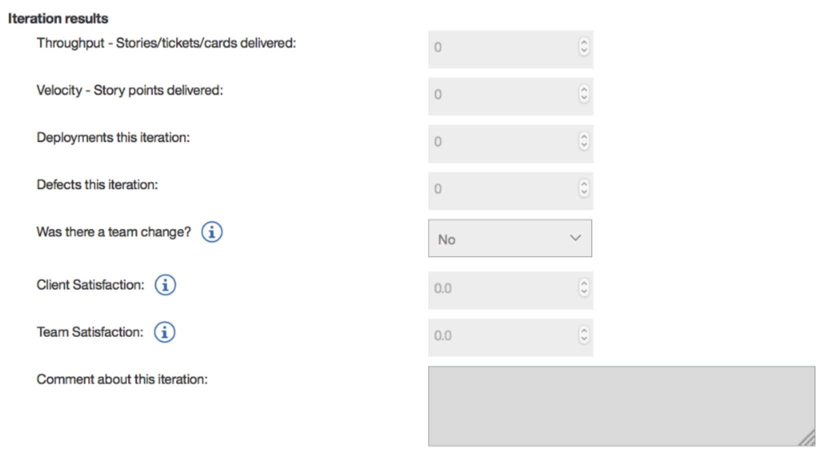


Figure 14

10. Enter the number of code deployments to production for this iteration.
11. Enter the number of open defects or 'bugs' discovered in this iteration. (This is a production environment statement.)
12. Indicate whether there was a team change during this iteration.

13. Enter your Client and Team Satisfaction scores for this iteration ranging between 1.0 and 4.0.

- Team Satisfaction
  4 – Very Happy
  3 – Happy
  2 – Unhappy
  1 – Very Unhappy
  0 – No entry

- Client Satisfaction
  4 – Very Satisfied
  3 – Satisfied
  2 – Dissatisfied
  1 – Very Dissatisfied
  0 – No entry

14. Enter any comments you may want to make about this iteration, i.e. why a team change, why a drop or increase in velocity, etc.…

15. The Unit Cost values are calculated based on stories and story points delivered divided by the FTE for this iteration.

Figure 15

16. Click the 'Add iteration' or 'Update iteration' button as appropriate.

ENTERING / VIEWING AN AGILE MATURITY ASSESSMENT

1. Click on the 'Maturity Assessment' tab at the top of the page. (See figure 16)

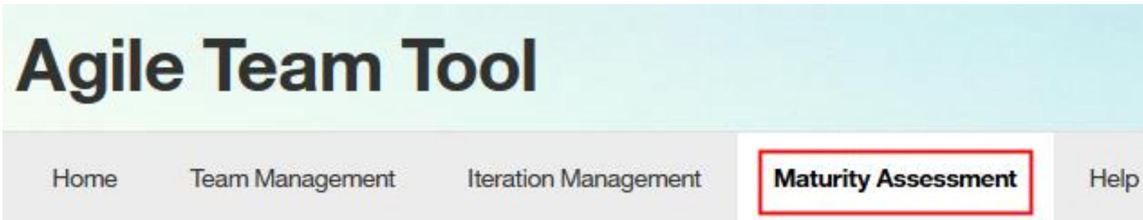


Figure 16

2. Select an existing team from the pick list. If you know the team name you can start typing it in and teams matching your entry will be displayed.
   - If you select a team for which you do not have edit access, you will see an informational message to the right of the team name indicating you must be a team member to have edit access. (See figure 8)
   - You can view an existing assessment for this team but you cannot create one and will not be able to make updates to the action plan.
3. Select 'create a new assessment' or select the date of an existing assessment.
   - If creating a new assessment, go to step 7.
   - If viewing a previous assessment, go to step 4.

View an existing assessment

4. Once an assessment date is selected you will have the ability to view the actual assessment or a summary level view. (See figure 17)

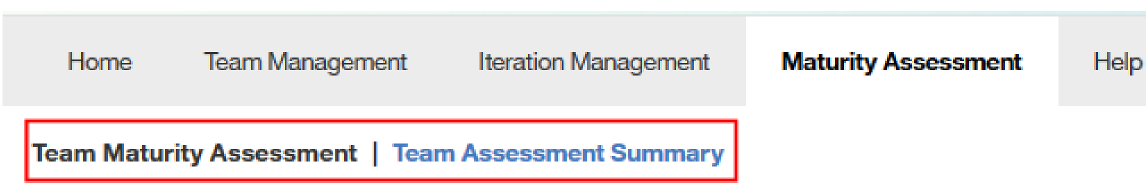


Figure 17

5. The 'Team Maturity Assessment' view displays the detail of the agile principles and practices as well as the assessed Current and Target values agreed upon by the squad / team. It will also show the actions recorded for the practices that are targeted for improvement.

6. The ‘Team Assessment Summary’ view displays a one-line summary for each agile practice with the Current and Target assessed values. The overall assessment levels are graphed on the right side for trending purposes.

- Click on each practice to see the trends for that particular practice
- At the bottom you will see the action plan for the team to improve agile practices.

Create a new assessment

7. Select whether the team being assessed is primarily a Project team or Operations team from the pick list. Use the information icon for more information.
8. Indicate whether this team delivers software. (Additional practices pertaining to DevOps will be presented if you select ‘Yes’)
9. Scroll down the list of agile principles/practices and indicate the maturity level of your team for each practice by clicking the appropriate radio button in the ‘Current’ column.
10. Once you have selected your team’s current maturity level, select the appropriate radio button under the ‘Target’ column to select the maturity level that the team has targeted for improvement before the next assessment cycle. See Figure 16 below. (It is recommended that you schedule assessments no longer than 90 days apart so the team can improve their maturity incrementally).

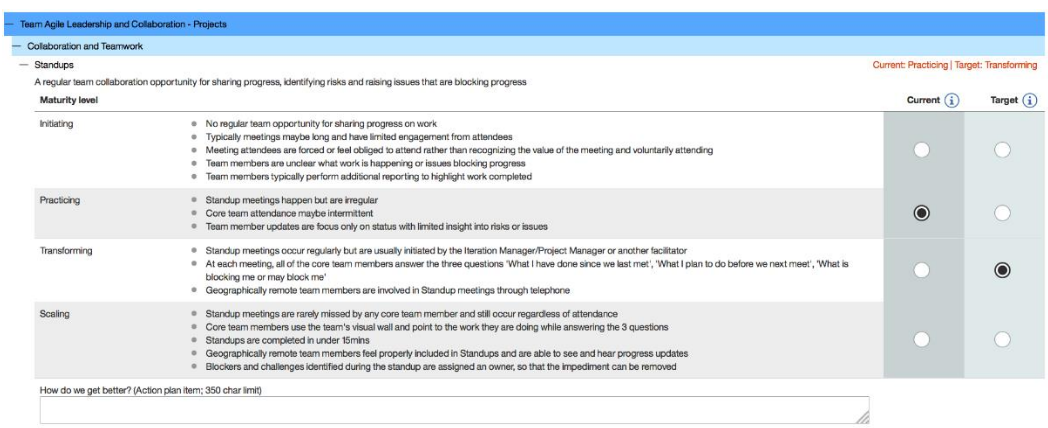


Figure 18

11. For each practice, you have the option to enter an action plan item on how you can get better. You should enter actions for those practices that are targeted for improvement.

12. Complete all sections and click the 'Submit' button <u>when finished</u>. If you are unable to complete the assessment you can click on the 'Save as draft' button at any time and return later to complete your assessment. (See figure 19)

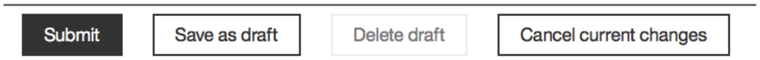
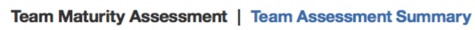


Figure 19

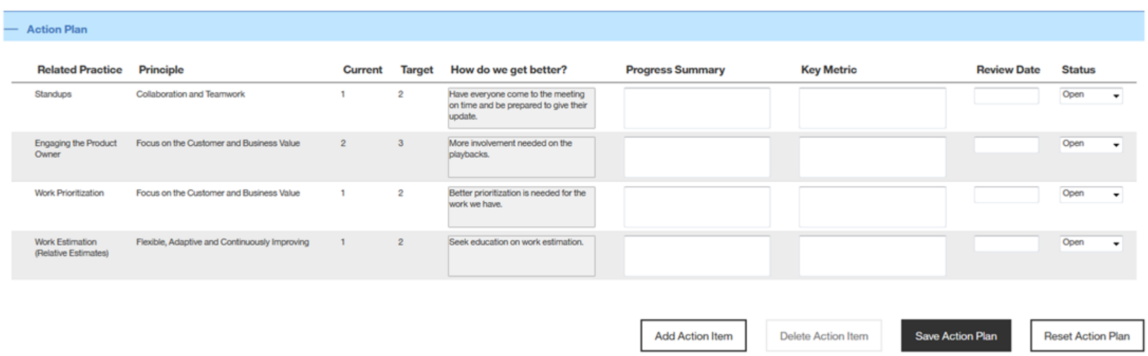
13. Once submitted, you will see all of your action plan items at the bottom of the Team Assessment Summary page.



(This view is selectable once you submit an assessment). At this point, you can add additional actions to the action plan if you wish.

14. Here you can track your progress and close them as they are completed. (See Figure 20)

- Key metrics can be defined and recorded. For example, the team may want to get their standups duration to 15 minutes or less.
- Review dates for the actions can be set.
- Progress can be recorded in the Progress Summary field.
- Status can be tracked in the status field.



— Action Plan

Related Practice	Principle	Current	Target	How do we get better?	Progress Summary	Key Metric	Review Date	Status
Standups	Collaboration and Teamwork	1	2	Have everyone come to the meeting on time and be prepared to give their update.				Open
Engaging the Product Owner	Focus on the Customer and Business Value	2	3	More involvement needed on the playbacks.				Open
Work Prioritization	Focus on the Customer and Business Value	1	2	Better prioritization is needed for the work we have.				Open
Work Estimation (Relative Estimates)	Flexible, Adaptive and Continuously Improving	1	2	Seek education on work estimation.				Open

Add Action Item | Delete Action Item | Save Action Plan | Reset Action Plan

Figure 20

APPENDIX A – NOTES

- 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 but a team can only be associated to a single parent.
- A person can be on the team member list more than once, i.e. two different roles at different allocation %.
- If a person is listed in the member list more than once, but with the same internet ID, the team member will only be counted once in the team member count.
- A parent team can have multiple teams underneath it but any team can have ONLY one parent.

APPENDIX B – AGILE ROLE CATEGORIES

- *Analyst*
  - *Business Analyst*
  - *Business Information Management Specialist*
  - *Data Specialist*
  - *Designer*
- *Architect*
  - *Application Architect*
  - *Enterprise Architect*
  - *Security Architect*
- *Consultant*
  - *Business Design Consultant*
  - *IBM Field Enablement Professional*
  - *IT Management Consultant*
  - *Process Excellence & Transformation Professional*
  - *Security Consultant*
  - *Security Specialist*
- *DBA*
  - *Application Database Administrator*
- *Developer*
  - *Application Developer*
  - *Portals & Collaboration Solutions Specialist*
- *Infrastructure*
  - *Infrastructure Architect*
  - *Systems Management Specialist*
- *Manager*
  - *Business Area Manager*
  - *People Manager*
- *Operations and Support*
  - *Application Focal Point*
  - *Audit & Compliance Focal*
  - *Business Operations Professional*
  - *Finance Coordinator*
  - *Financial Analyst*
  - *Measurements & Reporting Analyst*
  - *Support Center Representative*
- *Program & Project Mgmt*
  - *Business Programs Manager*
  - *Delivery Project Executive*
  - *Project Manager*
  - *Technical Team Leader*
- *Tester*
  - *Test Specialist*
- *Product Owner*
- *Iteration Manager*