Lesson 2   User Story Cards
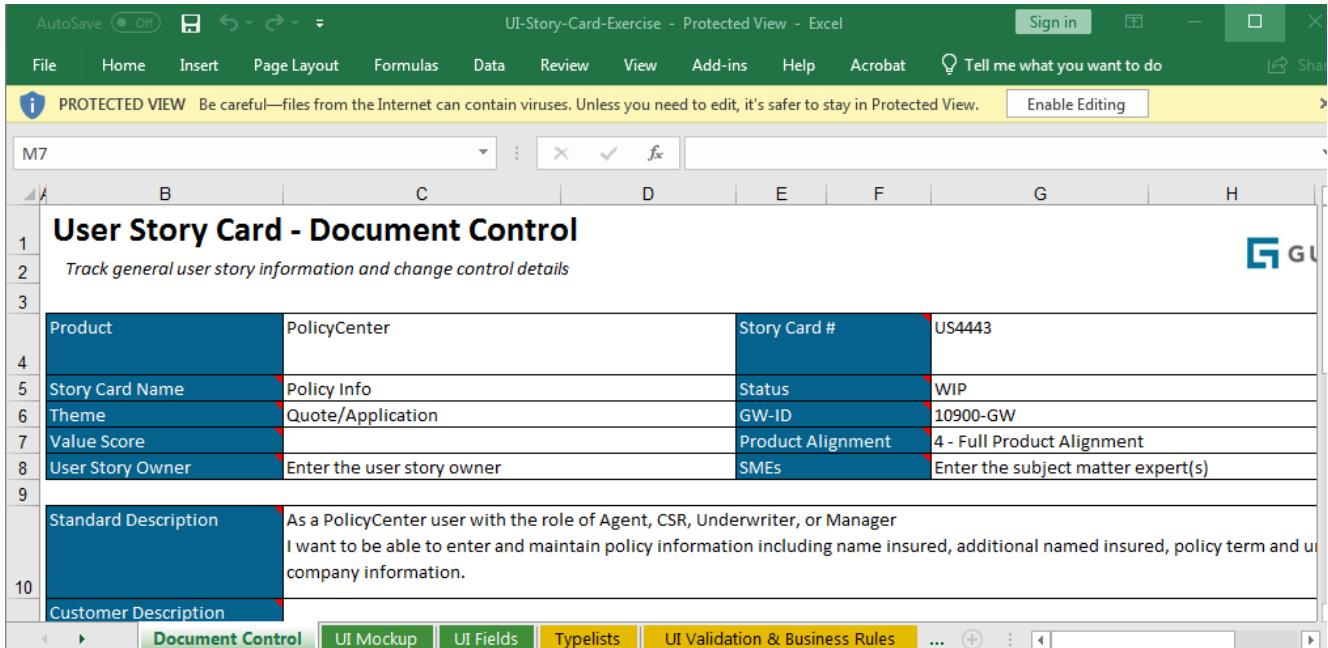
In this lesson, you learn about an integral tool to InsuranceSuite Implementations: user stories and user story cards.

2.1   User Stories & User Story Cards

In this section, we will describe the difference between User Stories and User Story Cards.

2.2   Explore a story card Demonstration and optional exercise

Watch the video demonstration to Explore a User Story Card. As an optional exercise, you can complete the following independently by reading the descriptions of the user story card elements and then identifying where these elements are found in a user story card file. To complete this activity, download the **User Story Card – Exercise file** available in the lessons of this course. Then open the Excel file: User Story Card -Exercise to view PolicyCenter's Policy Info Story Card.

Tip

Notice the small red triangle next to many of the fields. The triangle indicates more information is available about the field. If you hover over the field, a yellow box will appear describing the information contained in that field.

Document Control Tab

The first tab of the standard user story cards is the Document Control tab. This tab is used to track general information about the user story and details of document changes.

The top section of the Document Control tab is where the high-level theme, identification, and ownership information for the user story is recorded.

- **Story Card Name** - usually comes from the release planner. However, it may come from Jira.

- **User Story Owner** - typically is the name of the business analyst who is responsible for this story.

The next section is a high-level description of the user story and a description of key functionality changes, and gaps. **(Rows 14-22 in the spreadsheet).**

- **Standard Description –** This information is always populated from the release planner when the story card is generated.

- **Customer Description** – This field is where the customer's version of the user story is entered if it is different from the standard description.

- **Value Justification** - This field is where the business benefits for the story are entered, particularly if the story includes an enhancement.

The final section is where the lifecycle or revision history of this document is tracked including: who changed it, when the change was made, and a high-level description of the changes made to the document **(rows 25-32 in the spreadsheet).** When adding a new version, be sure to increase the version number with each change.

2.2.1   Exercise– Practice Documenting Document Control Tab

1. In the **User Story Owner** field, please enter your name as the Owner of the User Story.

2. In the **SMEs** field, put Alice Applegate as one of the SMEs you'll be working with.

3. In the **Customer Description,** update the standard description to reflect a summary of the new changes discovered during elaboration.

   a) Primary Named Insured for Personal Auto for this client could be a company or a person.
   b) The system must require a person (not a company) to be either the Primary or Secondary Named for each submission/policy.
   c) The users do not anticipate using the Date Quote Needed field.
   d) They need to capture a new Client Type data point with values like Livestock, Corp, or Other. Document that the Client Type data comes from the Salesforce.com integration.
   e) They need to know which number is the primary phone number to call an insured.
   f) They need to capture a new Policy Type field with values like Premier, Platinum, Assigned Risk.
   g) They need to capture a new field called: "Plan." This field will be used if the Policy Type is assigned risk with values like AIPSO and Pool.

4. In the **Document Control** – Amendment History section, add a new row indicating who made these updates to the file (your name), today's date, using the next appropriate version number. Include a short description of what changes you made.

UI Mockup tab

First, notice that the top section of this tab is carried over from the Document Control Tab. This information is repeated as the header for all subsequent tabs on the user story card.

The UI Mockup tab is where a screenshot of the proposed user interface for this story will be placed. The purpose of this tab is to capture a graphical mockup of a future state of the screen. Mockups can be created with mockup tools or by modifying a screen capture to represent what the new potential screen will look like. Then paste the image here. No other requirements should be documented in this tab. A best practice is to label each UI modification with the related requirement number.

2.2.2   Exercise – Practice Documenting UI Mockup Tab (Optional)

We will not practice documenting this tab in class; however, you can practice creating a mockup for the changes outlined in the last activity. Then see how close your mockup is to the one shown in the final solution.

If practicing the mockup, include the following:

1. Indicate removing or hiding the **Date Quote Needed** field.

2. The target location in the UI for the new **Client Type** field.

3. The target location in the UI for identifying the **Primary Phone**.

4. The target location in the UI for the new **Policy Type** field.

5. The target location in the UI for the new field called **Plan**.

UI Fields

The purpose of the UI Fields tab is to track the UI fields for the screens in this user story and to capture details about any field changes. Cross-out fields in the base configuration that are not needed or add a row for each new field that is required. Here you would document the known details about the new UI fields and changes. The following reviews the details that need to be captured for each UI fields by reviewing the columns on this tab and how best to document these details.

- **Name of DV or LV** - contains the name of the screen or portion of the screen (Detail View or List View) of where the field is located.

- **OOTB, New, Modified** - identifies the field as an out-of-the-box (OOTB) or base configuration, a new, or modified field.

- **Display Key** - is the path of the display key that contains the field label. (Name is a text string. Display keys facilitate translation of UI labels into different languages when multiple languages are required.

- **Label** - contains the label to be displayed on the screen.

- **Path** - specifies the path through the data model to get to the object that the field is referring to.

- **Table** - contains the physical table name where the field is stored.

- **Field Name** - identifies the name of the field in the data model.

- **Field Type** - specifies the data type of the source field: bit, varchar, integer, decimal, money, or percentage.

- **Field Length** - gives the length of the field or how many characters or digits to store in this field.

- **Typelist** - is used to point to a predefined typelist that limits the acceptable values for the field.

- **Editable** - indicates whether the field is editable. The field value can be true, false, or determined conditionally by Gosu code.

- **Mandatory -** indicates whether the field is required. Like the *Editable* field, this field value can be true, false, or determined conditionally by Gosu code.

- **Visible** - indicates whether the field is visible to the user.

- **Available -** This field indicates if the user can click on the field.

- **Default Value** - specifies a default value. If this field is blank, the default will be null or not selected.

- **Notes, Conditions** - is used to document any conditional editable, visibility, and mandatory requirements.

- **Label (Localized)** - is used to document locale labels when multiple locales are supported.

- **Wave or Release -** contains the implementation release number. Use this field to track versions of the field specifications across releases.

- **LOB** - Use this field if the user story crosses lines of business.

2.2.3 Exercise – Practice Documenting UI Fields Tab

Please enter the appropriate information for the new/changed fields in the User Interface

1. **Removing or Hiding the Date Quote Needed field**

2. **The known details about the new Client Type field**

3. **The known details about the Primary Phone identification**

4. **The known details about the new Policy Type field**

5. **The known details about the new Plan field**

Typelists Tab

This tab is used to document new and changed typelists that are included in the user story such as changes to existing drop-down values and the addition of new values in drop-downs. To review, a typelist is a predefined list of values used to constrain a field. When rendered in the UI, a typelist typically appears as a drop-down. Why is this tab blank? There are so many typelists in the base product that they are not listed here. Instead, you can find them in the Data Dictionary. Therefore, only use this tab to document new and changed typelists. To assist you in accurately documenting this tab, we will review the details required for Typelists:

- **Name of Typelist** - refers to the name of the typelist that is used when defining a field in the UI Fields tab. Enter one row for each drop-down value (referred to as the "typecode").

- **New, Modified** - indicates whether this typelist is new or modified. A value of new means the typecode is customer defined. A value of modified indicates a modification to an OOTB typecode.

- **Code** - is the internal name used for the typecode.

- **Typecode Name** - specifies the name the user will see in the drop-down list on the UI.

- **Typecode Description** - field is the long description of the typecode, which will be displayed in the Data Dictionary. Usually, the description is the same as the typecode name.

- **Priority** - determines the order of the drop-down values. Use intervals of 10 (10, 20, 30, and so on) to allow for new values to be inserted later.

- **Retired** - which is used to indicate that the typecode is no longer used. The values should be True or False, where True means the typecode is retired.

- **Conditions** - This field is used to document any visibility conditions. Sometimes you want a value to be filtered. This can be static or dynamic.

- **Typecode Name (Locale)** - Use this column for locale typecode name when supporting multiple locales.

- **Typecode Description (Locale)** - which is used when supporting multiple locales.

- **Wave or Release** and **LOB** - same information as provided on the UI Fields tab.

2.2.4 Exercise – Practice Documenting Typelists Tab

Please enter the appropriate information for the new/changed typelists:

1. **The known details about the new Client Type field.**

2. **The known details about the new Policy Type field.**

3. **The known details about the new Plan field.**

UI Validation & Business Rules Tab

The Validation and Business Rules tab may be used to document requirements for data validation and business rules. However, Guidewire recommends that underwriting issues and validation rules be placed in a separate workbook or master list instead of storing them in this tab. You will be given an opportunity to practice writing business rules in the Functional Requirements course. As an optional exercise, you may download the Underwriting Rules and Validations user story card from the collateral library and attempt writing validation rules for the requirements below.

2.2.5 Exercise – Practice Documenting Validation Rules

Please enter the appropriate information for these two requirements:

1. **Primary Named Insured for Personal Auto for this client could be a company or a person.**

2. **The system must require a person (not a company) to be either the Primary or Secondary Named for each submission/policy.**

Action Items Tab

The purpose of this tab is to capture outstanding action items related to the completion of this story.

2.2.6 Exercise – Practice Documenting Action Items

Please enter the appropriate information for these two outstanding action items to capture:

1. **Someone needs to identify all the fields coming from the Salesforce.com integration and we want that before our next meeting in 2 business days – assign this to Alice Applegate.**

2. **Someone needs to confirm and document all the client type field value options. We want that for tomorrow – assign this to Alice Applegate.**

UI Final Tab

The purpose of this tab is to capture a final screen shot of the User Interface. We will not complete this tab as we have not had a developer build out the new screen.

Acceptance Criteria Tab

The first section of the User Story Card carried over from the Document Control Tab. The second section is where a Product Owner would sign off that all Criteria were Accepted. The third section is to capture the individual Acceptance Criteria.

2.2.7   Exercise – Practice Documenting Acceptance Criteria

Document the known acceptance criteria from our details. There could be one or more acceptance criteria per item below. Note: A single acceptance criterion could apply to multiple items.

1. **Primary Named Insured for Personal Auto for this client could be a company or a person.**

2. **The system must require a person (not a company) to be either the Primary or Secondary Named for each submission/policy.**

3. **The users do not anticipate using the Date Quote Needed field.**

4. **They need to capture a new Client Type data point with values like Livestock, Corp, or Other.**

5. **They need to know which phone is the primary phone number to call an insured.**

6. **They need to capture a new Policy Type field with values like Premier, Platinum, Assigned Risk.**

7. **They need to capture a new field called Plan, if the Policy Type is assigned risk with values like AIPSO and Pool.**

2.3   User Story Cards in the Project LifeCycle

In this section we will review when User Stories and User Story Cards are used during the project lifecycle.

(There are no exercises for this section)

2.4   Planning Delivery Sprints with User Stories

In this section, we will discuss how user stories are used to plan for Delivery Sprints.
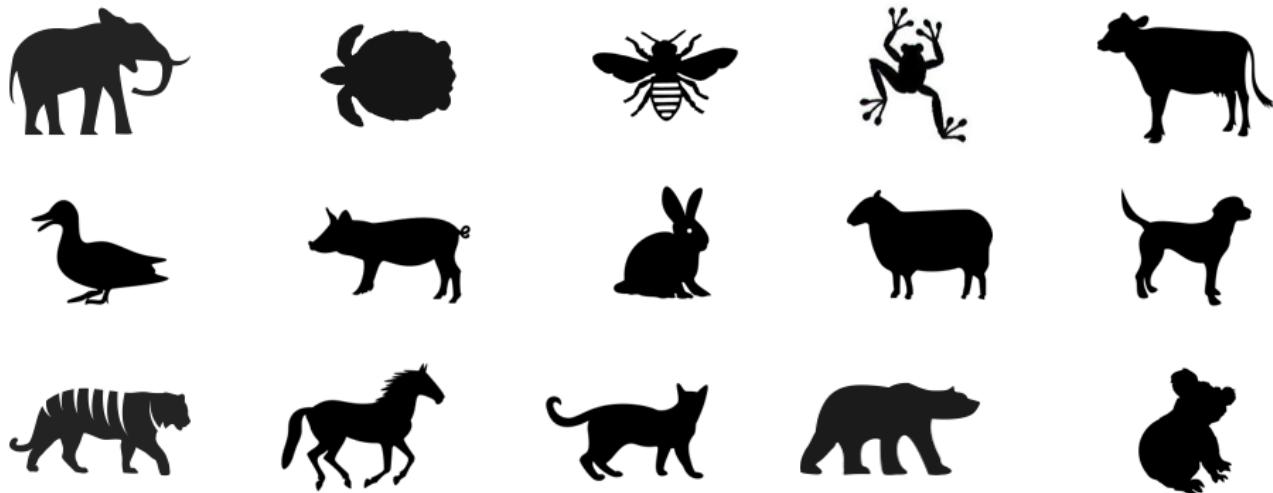
2.4.1   Estimation Exercise

Coming up with an accurate estimate for each user story can be difficult, especially if unfamiliar with the related requirement and work to be done. How do you estimate something you have no knowledge of or have not done before?

For this exercise, we introduce you to the concept of sizing estimating.

1. **First, provide a time estimate for completing this task: Sort the animals displayed by size (small to large).**

2. **Next, complete the task and record the actual time it takes.**

3. **How close were you to your estimate?**

Most can provide an accurate estimate for this task because they are familiar with these animals.

Reflection

1. **Now, what if you were asked to estimate the average weight of each animal?**
2. **How accurate would your estimate be?**
3. **How much time would it take?**
4. **What assumptions did you make when estimating size?**
5. **What variables would have helped in making this determination?**

2.4.2 Room Redo Exercise

In this exercise, we will practice estimating using points to size the work for remodeling a room in a house.

You will need:

- An easel, whiteboard, or piece of paper for each team to write down tasks and estimates for each task.

Team Structure:

- If instructor-led, the class will be divided into smaller teams with 4-6 members if possible. Each team will need an area to collaborate.
- If self-study, this exercise can be completed independently.

Objective:

- For teams to practice sizing and estimating tasks for a real-world user story.
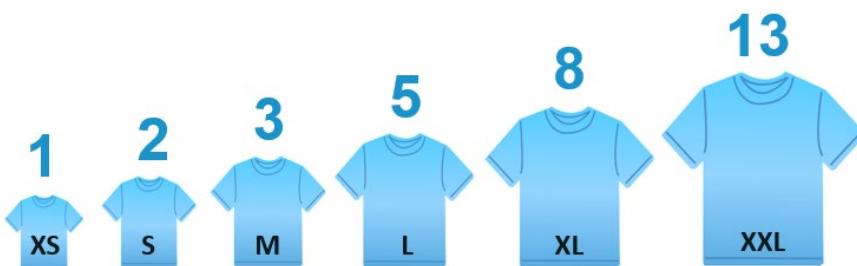
Rules:

1. **Five home improvement user stories have been defined (See next slide)**

2. **First, go through the process of sizing each story using the concept of T-shirt sizes. Enter those sizes on the next slide.**
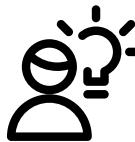
Hint

Relate the Fibonacci scale (1, 2, 3, 5, 8, and 13) to T-shirt sizes, where a lower point value indicates a lower amount of development time. A point value of 1 is approximately 8 -12 hours of development time.

3. **After the stories are sized, Instructor-led groups will break into teams of ideally 4-6. Each team will select a story to work on and find a place where they can collaborate. If self-study, select one of the stories to work on independently. Then spend 30 minutes elaborating the following information for the story:**
   1. **Tasks for the user story**
   2. **Estimate in hours for each task**

When done, a volunteer from each team will be asked to present their tasks and hours. The facilitator will record estimates in the chart or whiteboard. Self-study participants, record estimates below.

Reflection

1. Were any assumptions made while estimating (e.g. Was it assumed that tools/supplies were already purchased?)

2. Were there any dependencies between tasks or other stories? (e.g. One task must be completed in one story before another in another story).

3. Was time estimated for just the physical activity or for the wait time too? Why or why not? *(Note: Guidewire does not typically document that lag time in Guidewire tasks; we just start on another task while we are waiting.)*

4. Add up the hours estimated for each task and enter in the hours for each story in the chart. Compare the total hours for each story to the size estimate for each story. How accurate were the size estimates in relation to the hours estimated?

5. Should any stories have been sized larger or smaller?

6. Now, add up all the Total Hours for all the stories. Could the work have been completed in one 3-day weekend? Why or why not?

User Story	Size	Hours
Paint walls with 12" vertical stripes		
Repair/repaint baseboards		
Fix drywall		
Install chair rail		
Install new light fixture		
Total Hours		