# Pivotal Tracker

Quick start & demos

Why Pivotal Tracker?

Break down projects into manageable chunks and have conversations about deliverables and scope.

As your team estimates and prioritizes those stories, Tracker divides them into future iterations, learning from your team's natural pace of work.

Tracker's transparent team view of priorities means that **everyone** knows what needs to be done, what is being done, and when it will be completed.

Workflow overview
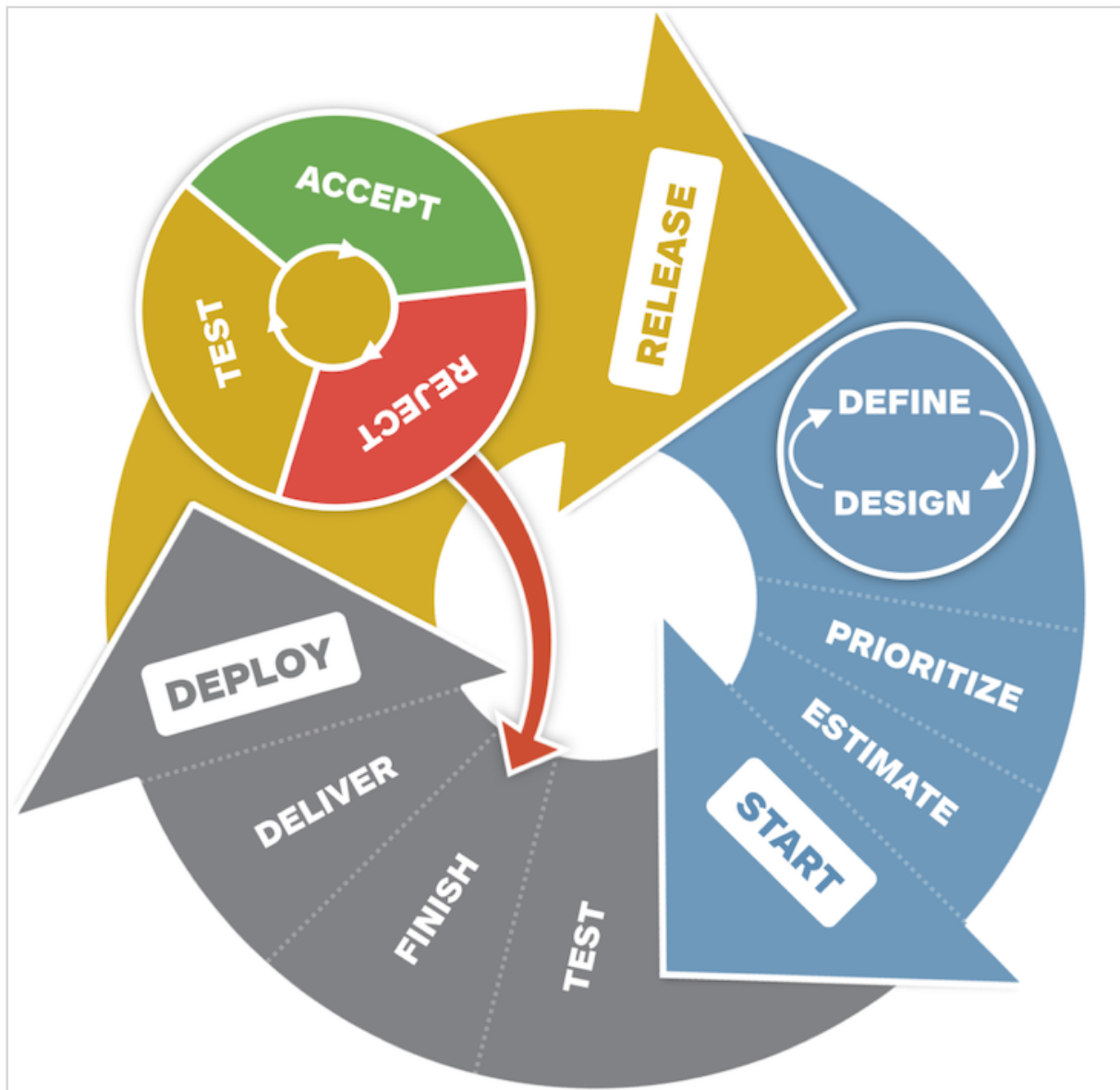
1. **Writing stories:** gather requirements and break them up into stories. Stories are in the unscheduled state if they are added to the Icebox, are unestimated, or if they have points to estimate in place of an action button.

2. **Prioritize stories:** prioritize stories in Backlog. Stories are then in the unstarted state, and remain unestimated.

3. **Estimate stories:** the team discusses each story to gain shared understanding, adds extra information as needed (such as acceptance criteria), and collectively estimates each story. Estimated stories have a Start button.

4. **Start stories**: click Start on the next unstarted, estimated story in the current iteration. The story is now in the started state, with a Finish button and, unless preassigned, the person who clicked Start becomes a story owner. The developer(s) collaborate with other team

members (such as the customer*PM*PO, designers, and testers) to perform the testing and coding activities to build the feature increment represented by the story.

5. **Finish and deliver stories**: When coding and testing activities for the story have been completed, and the automated tests for it have all passed, the developer(s) click the Finish button (or possibly their commit message does this via Tracker's SCM integration. Now the Deliver button is available.

6. **Test stories**: After the CI build for the newly committed code has passed, the code is deployed to appropriate test environments, and stories are marked as delivered by a team member or automated deploy process. Now the green Accept and red Reject buttons are visible.

7. **Accept or reject stories**: The customer*PM*PO, possibly in collaboration with testers, designers, and other team members, verifies whether acceptance criteria have been met, and accepts or rejects the story, completing the feedback loop. The accepted story turns green and moves to the top of the current iteration.

8. **Stories move to the Done panel**: At the end of the iteration, accepted stories move to the Done panel.

Blockers

Various factors that stall a story's workflow can be highlighted using labels such as "needs design," or "needs discussion." You can also explicitly call out stories that are blocking other stories using Tracker's blocking feature.

If work on a story can't proceed due to unexpected impediments, you can add a blocker to indicate what's in the way. Adding a blocker automatically makes you a follower of the story if you weren't already following it.

Organizing with epics

Epics allow your team to plan, discuss, and monitor the progress of coarse-grained

features or themes at a **level higher** than you can with individual stories.

You can **associate** multiple related stories with an **epic**.
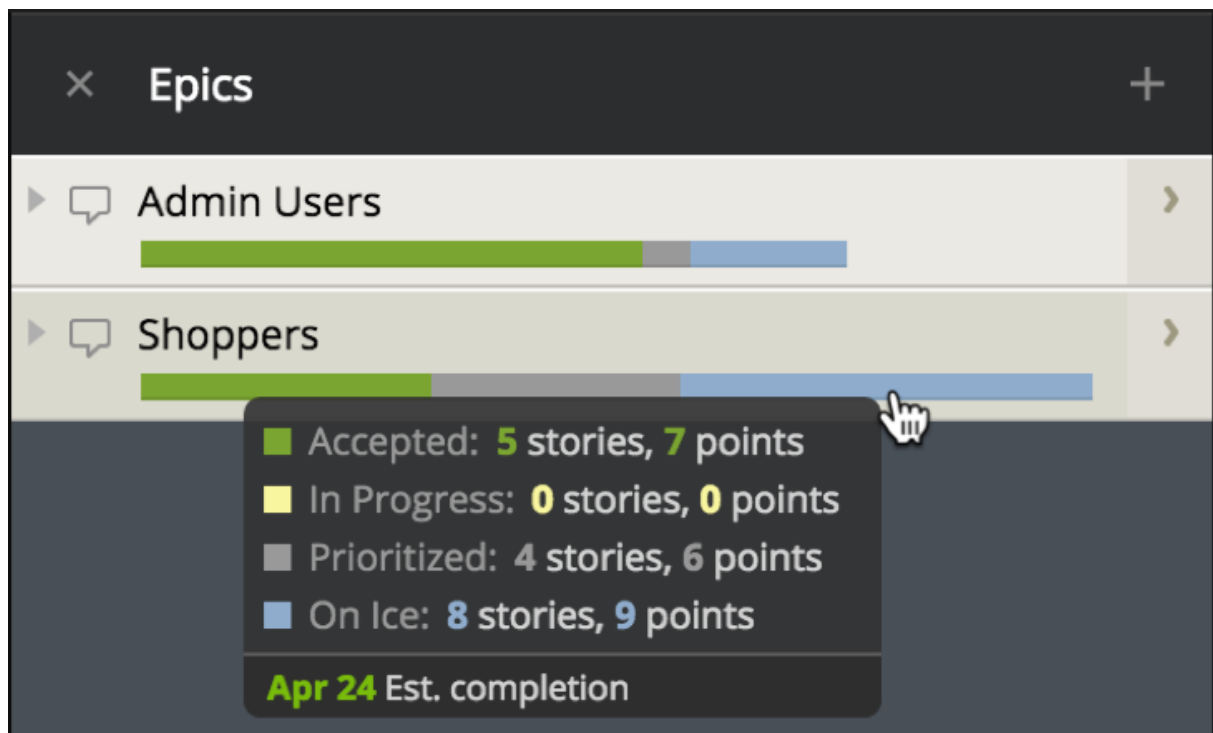
You can order them independently of stories in the Backlog to make the project's big-picture priorities obvious to the whole team.

If a big feature that spans many stories ➡ **epic** is the way to go

Epics are tied to stories by a special label called the **epic label**. Apply this label to stories to make them part of the epic.

FQAs

Why can't I drag stories to the Backlog? Why do they move to Current instead?

Tracker will only allow stories to be planned in the Backlog if the Current panel contains at least as many story points as the project's velocity value. For example, if the project velocity is 10, and there are only 5 points' worth of story points in Current, Tracker will

place any new stories in Current until that value of 10 has been exceeded. Once the Current panel contains as many story points as the project velocity is currently worth, stories will start being planned in the Backlog for future iterations.

What is the Icebox used for?

The Icebox panel is used to house stories that aren't yet ready to be prioritized or scheduled. A story can be added and kept "on ice" until it's ready to be prioritized by clicking the + at the top of the Icebox panel. When it's ready to be prioritized, drag it into the Current iteration/Backlog panel. Icebox stories are in the "unscheduled" state.

Can I manually plan the Backlog?

Even though it's sometimes possible to schedule a story in a particular iteration, it's likely to change and move into another iteration as conditions in the project change. For this reason, we recommend to not put so much emphasis as to what iteration a story is in, but rather, the priority order of the story in relation to other stories in the project.

How do we resolve stories we've decided not to implement?

In these cases, we'd recommend creating a label describing the situation ("won't fix", "obsolete", "duplicate", etc.) to apply to such stories, and then move the story to the bottom of the Icebox along with a concise comment explaining the decision (you must "unstart" the story before it can be moved to the Icebox).

Another option might be to create a special project whose purpose would be to store stories that won't be implemented or fixed. For instance, you could name this project "Freezer" or "Archived stories", then move stories there as needed.