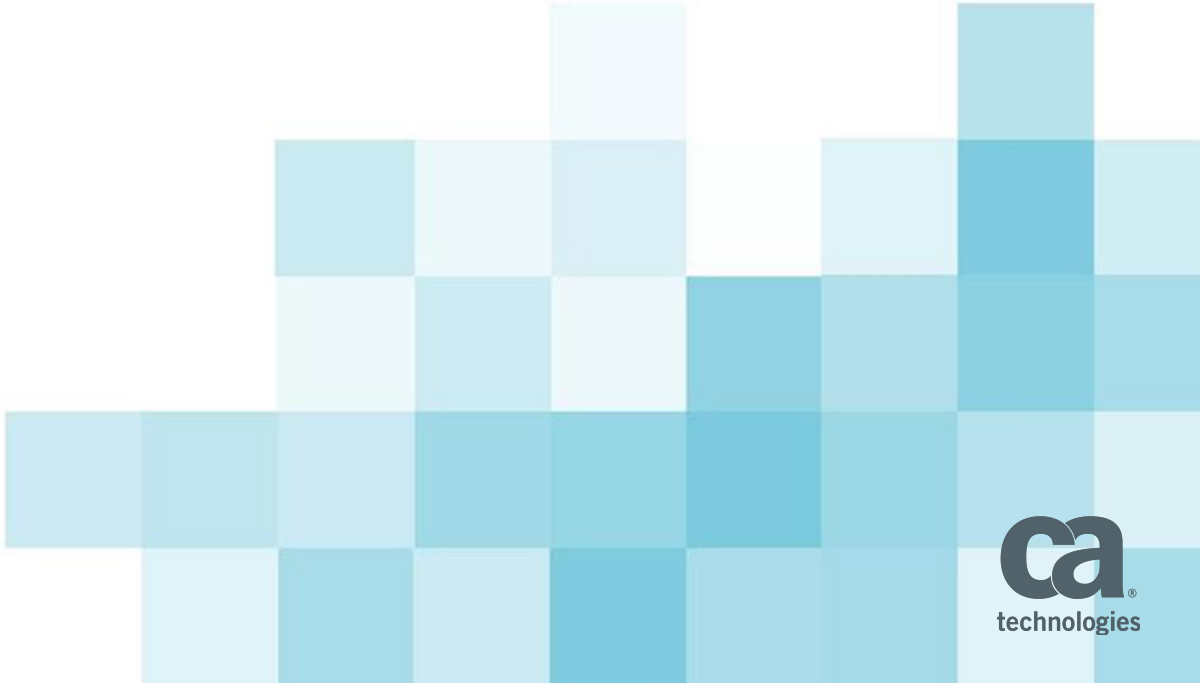
# The New User Experience & Helpful Resources

Carolina Weibring - Technical Account Owner
carolina.weibring@ca.com

**November 1st, 2016**



ca technologies

# Agenda

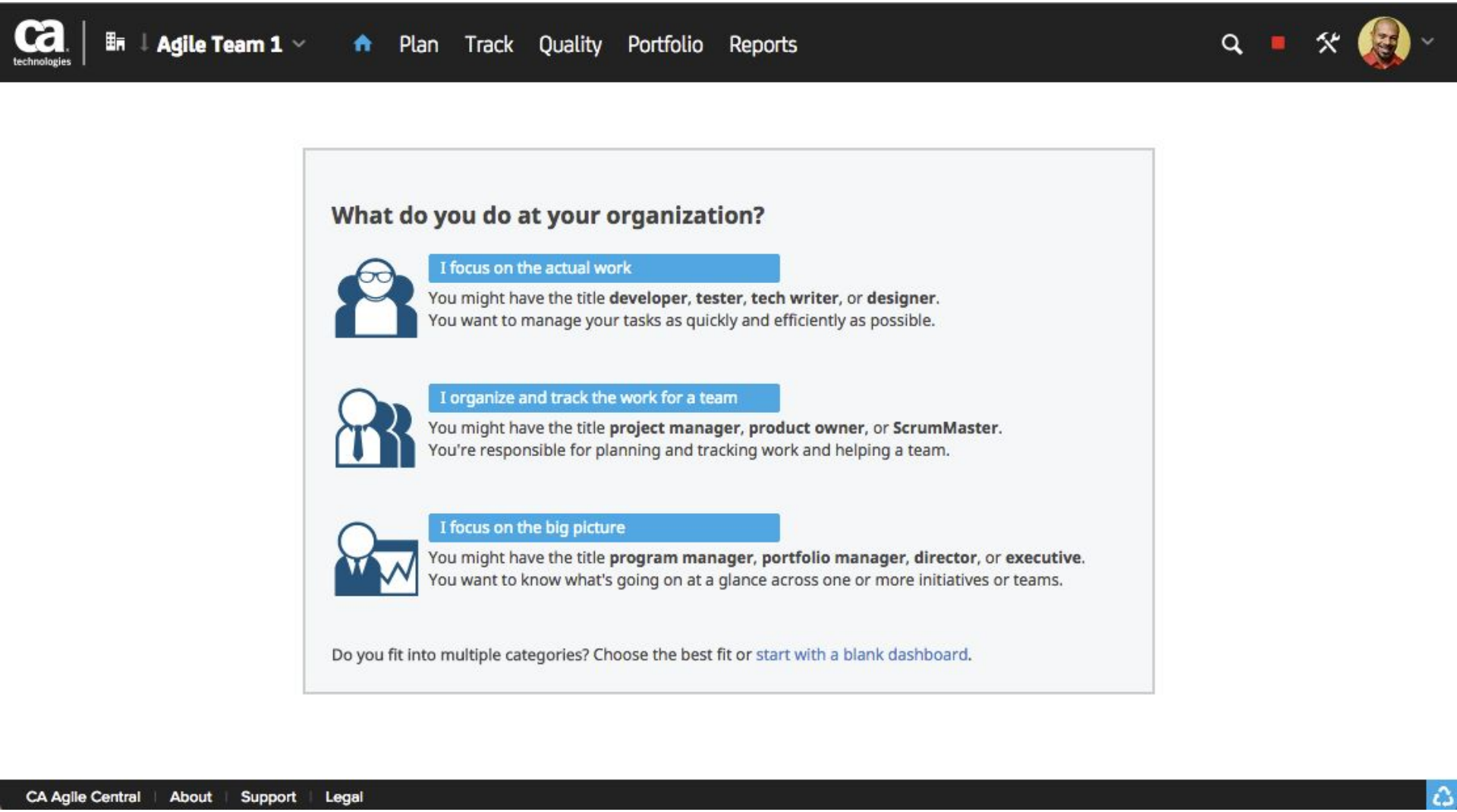
1. INTRODUCTION and NAVIGATION
2. THE “PROJECT” (TEAM) PICKER
3. HOW WORK IS ORGANIZED AND TIMEBOXES
4. DEFINING YOUR BACKLOG FROM TOP TO BOTTOM
5. TEAM BACKLOG MANAGEMENT, ITERATION PLANNING AND EXECUTION
6. DASHBOARDS, REPORTING AND ADDITIONAL RESOURCES
7. Q&A


© 2015 CA. ALL RIGHTS RESERVED.

# Introduction

# First Time You login

## My Dashboard

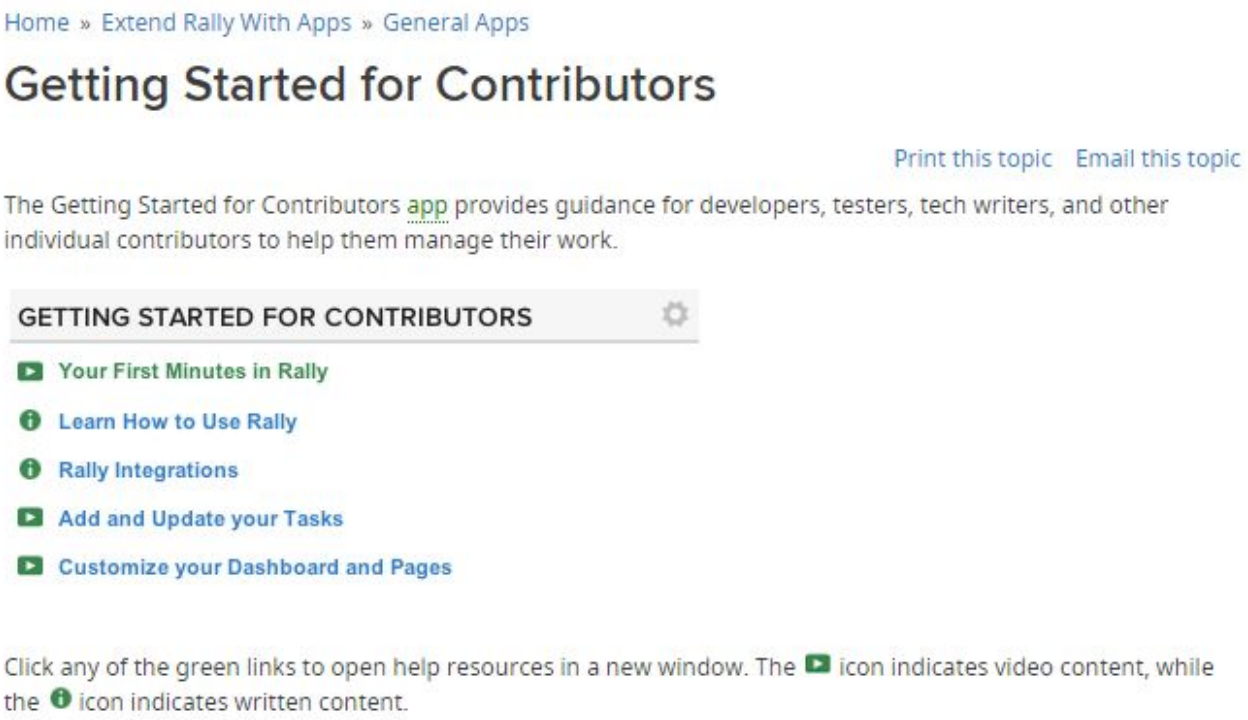





© 2015 CA. ALL RIGHTS RESERVED.

# Dashboard Apps

## Getting Started - Contributors, Executives and Organizers

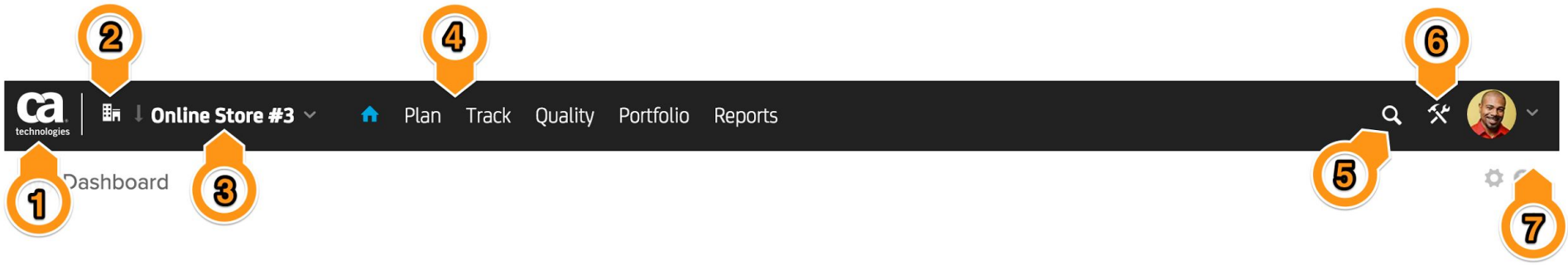




© 2015 CA. ALL RIGHTS RESERVED.

# Navigation

# Navigation Menu




1 - The product logo (non-functional)

2 - Workspace Chooser

3 - “Project” (Team) Picker

4 - Pages Menu

5 - Search

6 - Administration

7- Settings, Profile, Help, etc.


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# “Project” (Team) Picker

Select the **Organizational Context**

- Context is Critical -- We’ll come back to this!


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Parts of the Project Picker

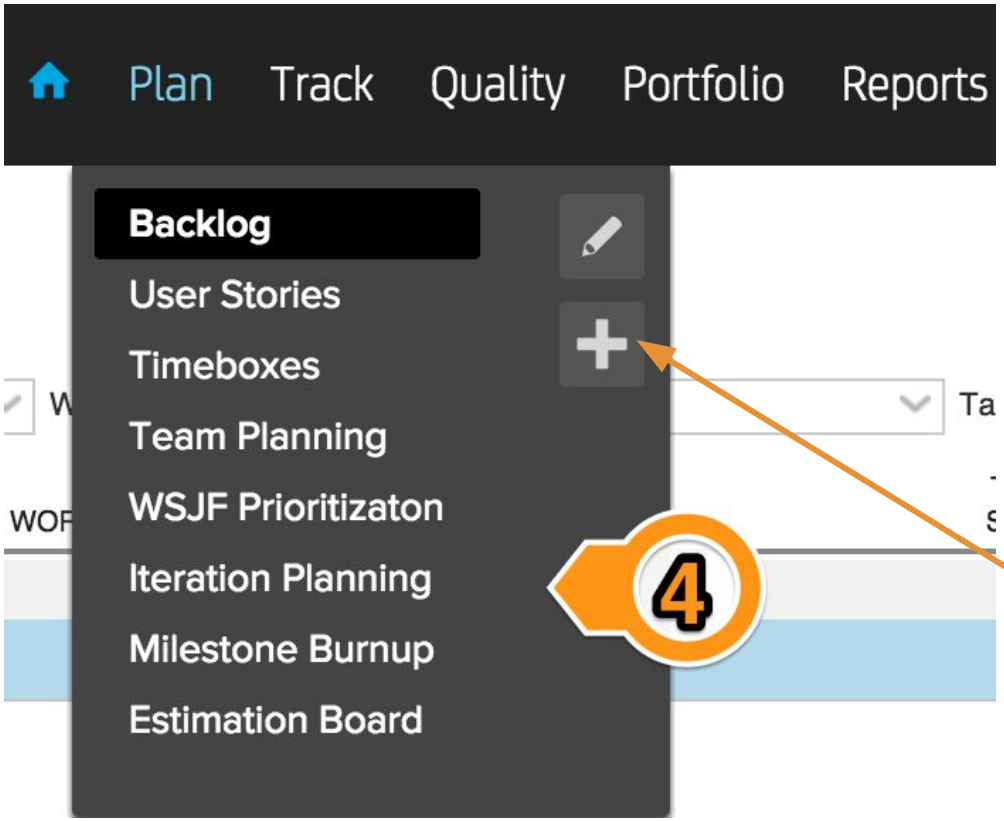
1) 3 Most Recent Project Contexts

2) Navigate / Select a New Project Context

3) Control Visibility


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Pages Menu




Pages are views or applications that allow you to create, manage or track your work.

- Categorized by type of activity (Planning, Tracking, etc.)
- You can create custom pages.


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

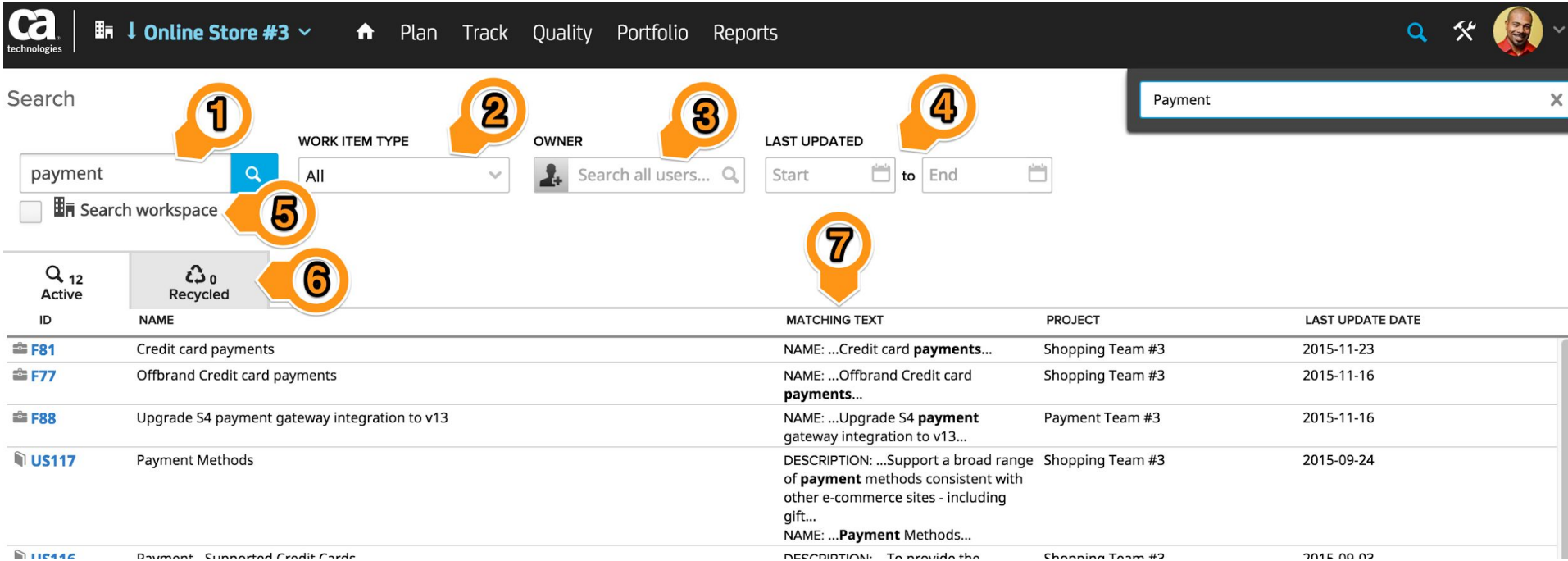
# Search

Search for any work-item type

- / = shortcut key for search
- Type a work-item ID to go directly to that item (e.g., US204)


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

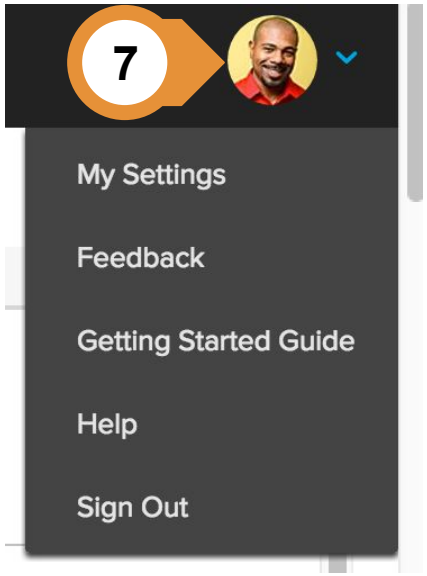
# Search Results




1. Search terms
2. Narrow by work item type (Story, Feature, Defect, etc.)
3. Narrow by work item owner
4. Narrow by last-updated date range
5. By default, search returns results **within your current "Project" (Team) context or its children.** Check this box to search the entire workspace (restricted to projects for which you have permission).
6. By default, shows active work items. Use "Recycled" tab to search work items that have been deleted.
7. Matching text shows WHY the item was returned as a match.


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

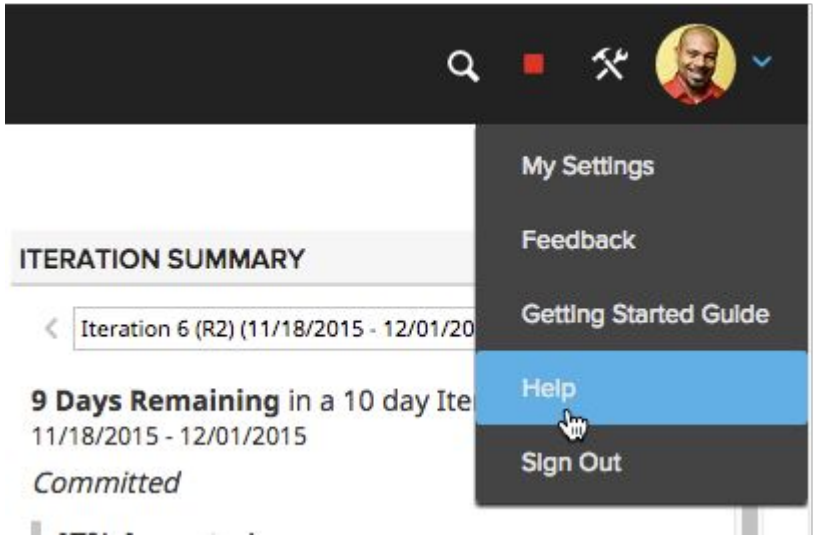
# Settings, Profile, Help



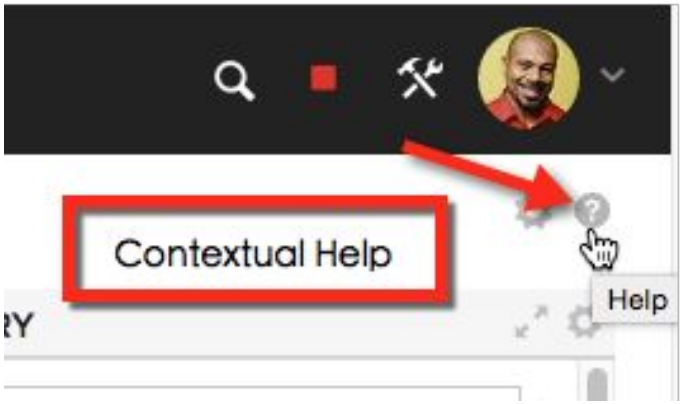

- My Settings (personal account settings):
  - User Profile (Name, Role, Picture)
  - Watches
  - Notification Rules
- Feedback - Product Feedback, direct to the product team!
- Help - The CA Agile Central Help Site
- Sign Out - Securely sign of of CA Agile Central


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Help




OR



© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# The “Project” (Team) Picker

# “Project” (Team) Picker

Select the **Organizational Context**

- Context is Critical -- We’ll come back to this!


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Parts of the Project Picker

1) 3 Most Recent Project Contexts

2) Navigate / Select a New Project Context

3) Control Visibility

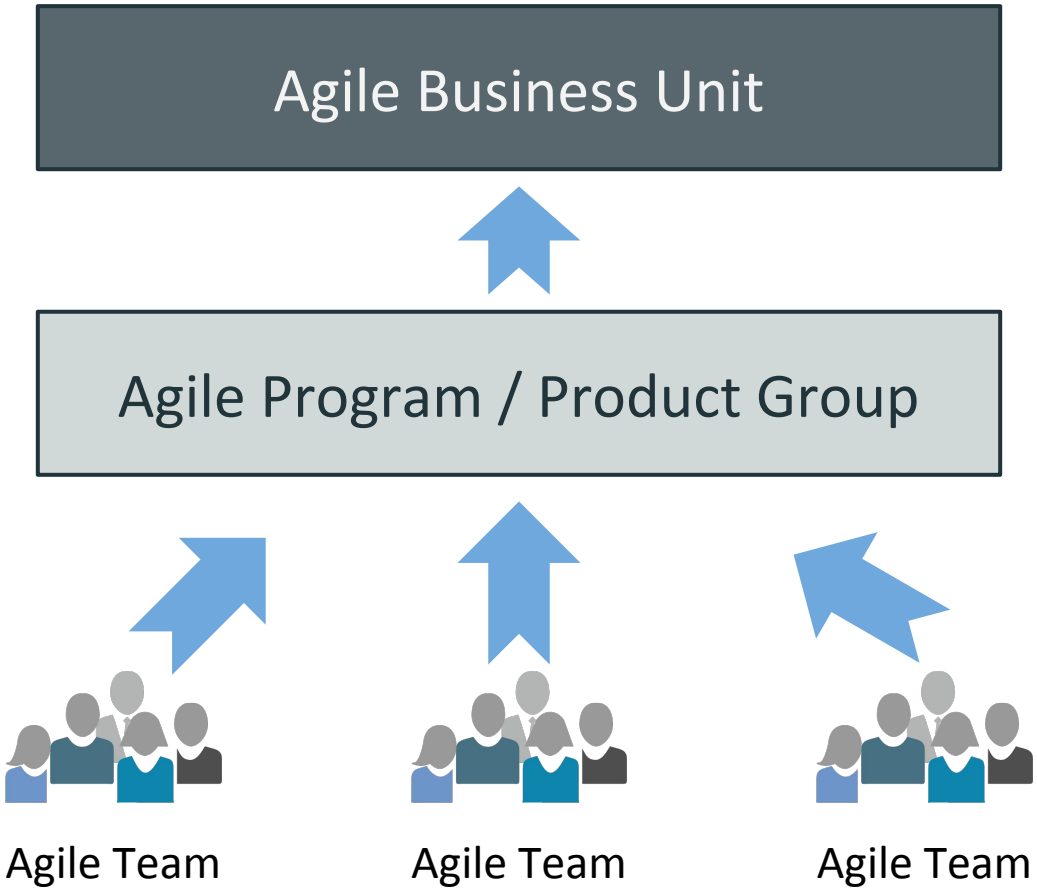


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# “Project” (Team) Picker

“Projects” are **NOT** work items. They represent organizational structure.

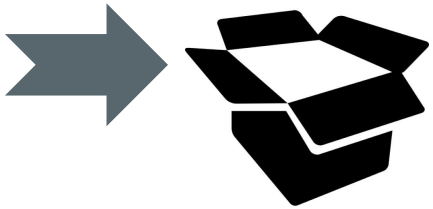




© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

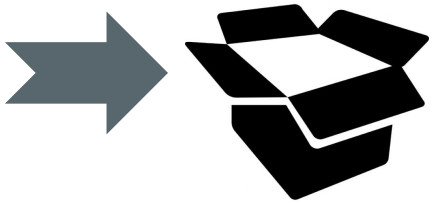
# A “Project” (Team) is a container for work items

**Themes**



Agile Business Unit

**Initiatives, Features**



Agile Program / Product Group

**Features, Stories, Defects**

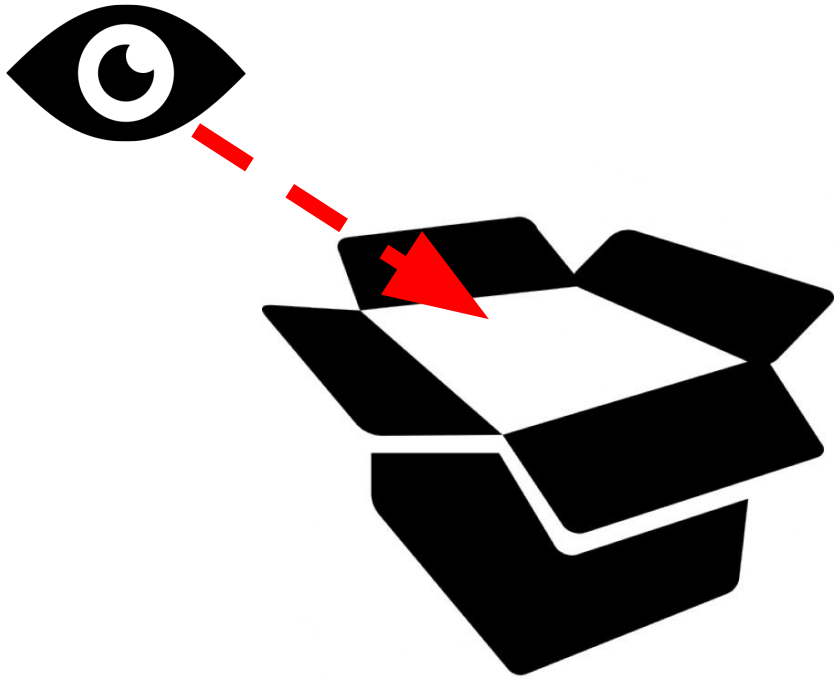
Agile Team | Agile Team | Agile Team



© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# When you select a project, you are "looking into its box"

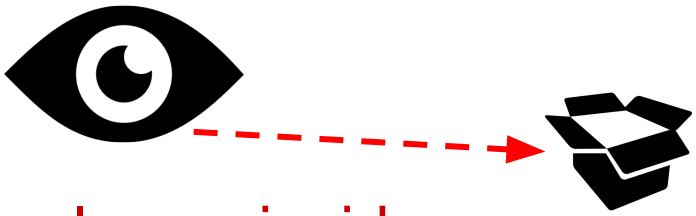




© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Adjust Visibility - **Parent & Child Deselected**



I only see inside my selected project

Agile Business Unit

Selected Project

Agile Program / Product Group

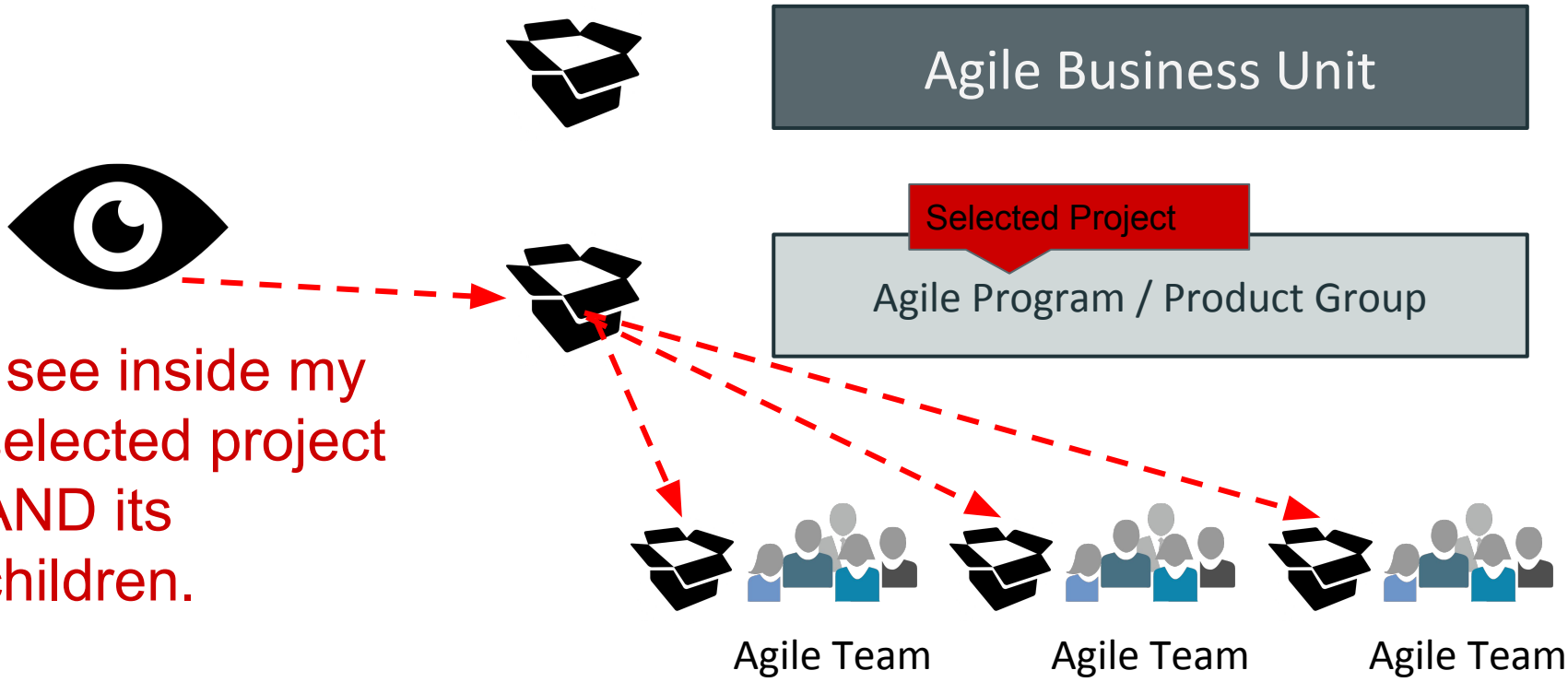
Agile Team Agile Team Agile Team



© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Adjust Visibility - **Child Projects Selected**

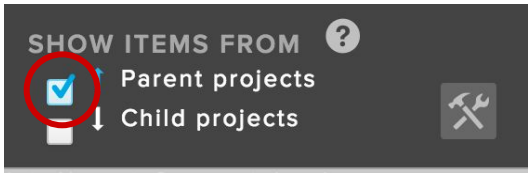


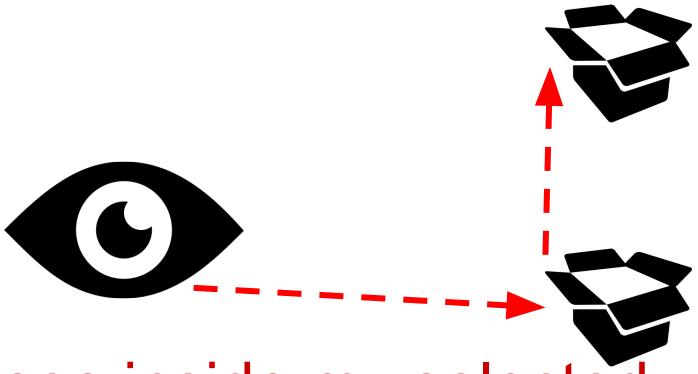



© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Adjust Visibility - **Parent Projects Selected**



I see inside my selected project and its parents

Agile Business Unit

Selected Project

Agile Program / Product Group

Agile Team Agile Team Agile Team



© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Project Tips

**When creating work items:**

Make sure you are working in the right “box”!

**Can’t find a work item?**

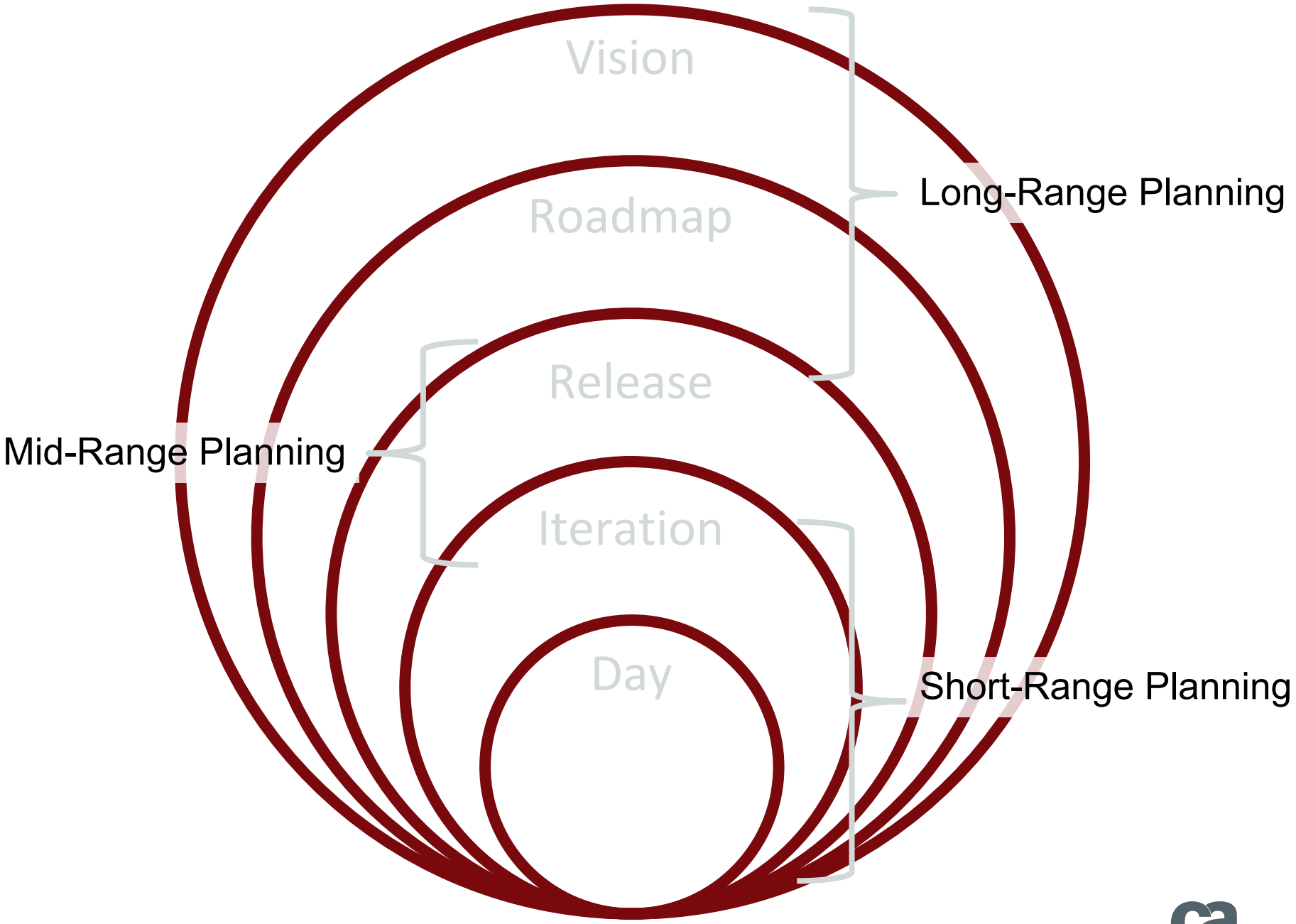
Make sure you are looking in the right “box”!

**See too many items?**

You may have “Child” or “Parent” Projects Visible!


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

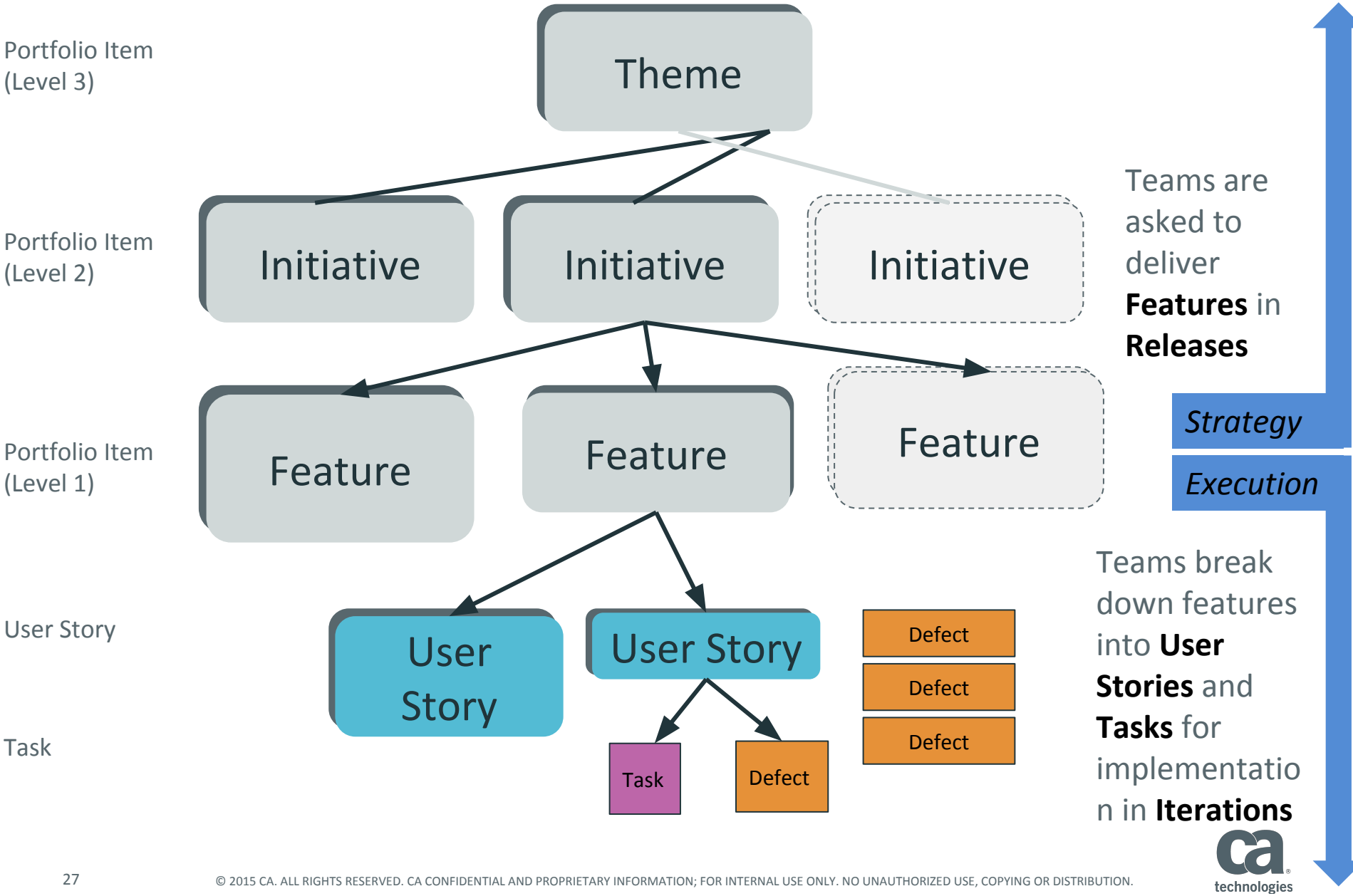
# How Work is Organized





© 2016 CA. ALL RIGHTS RESERVED.

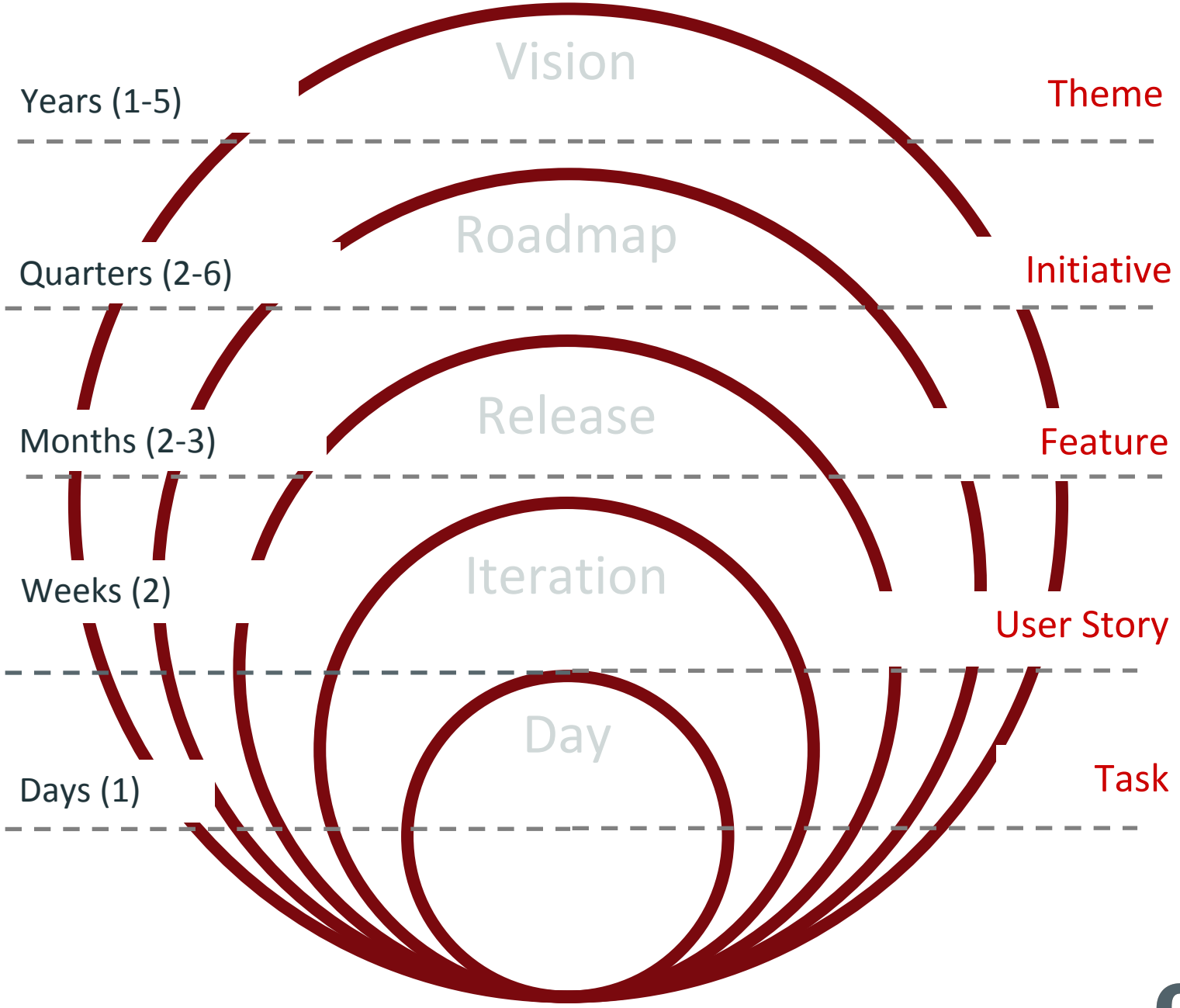
# The Work Item (“artifact”) Hierarchy






© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

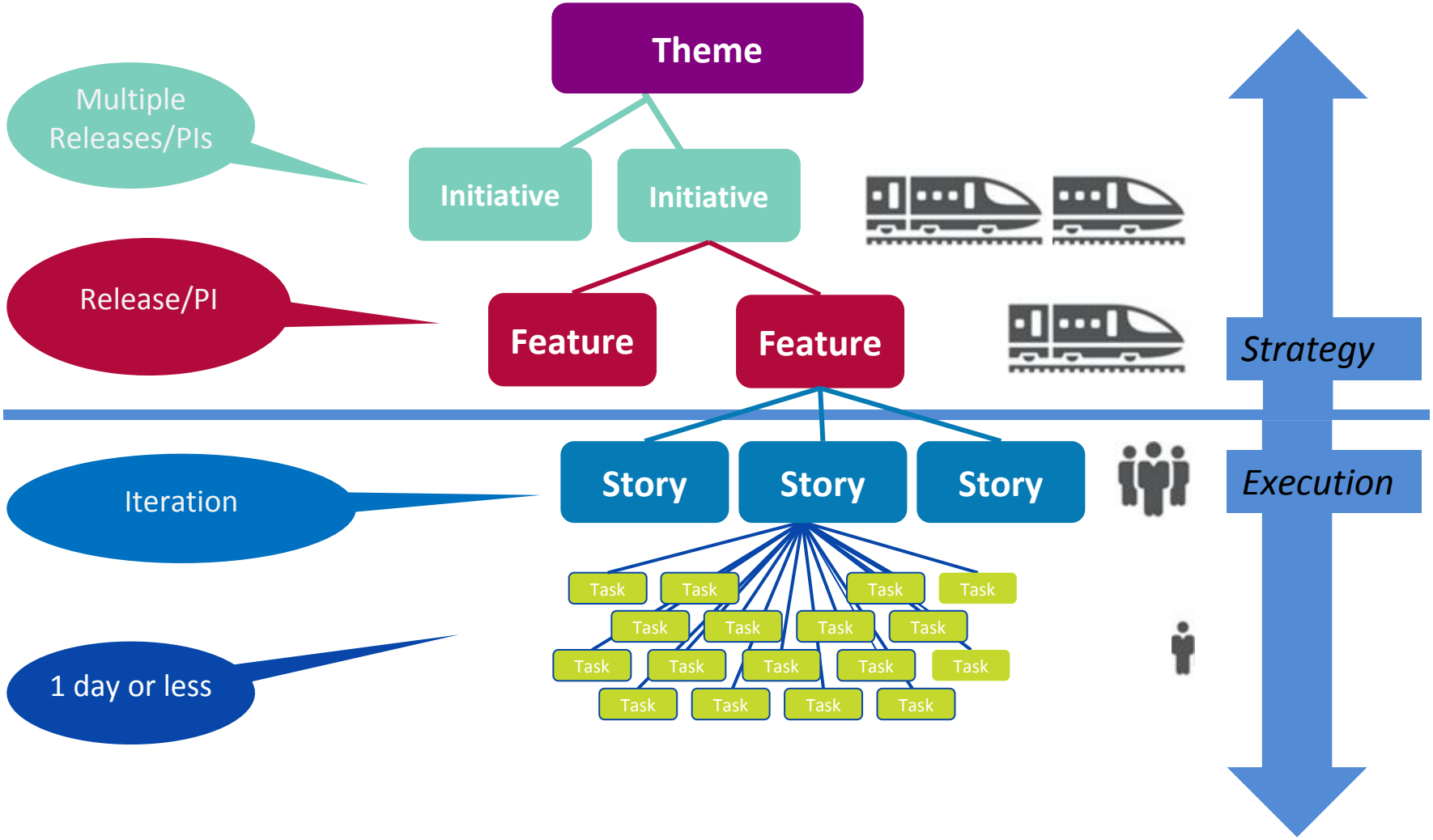





© 2016 CA. ALL RIGHTS RESERVED.

ca technologies

# How work is organized in Agile Central



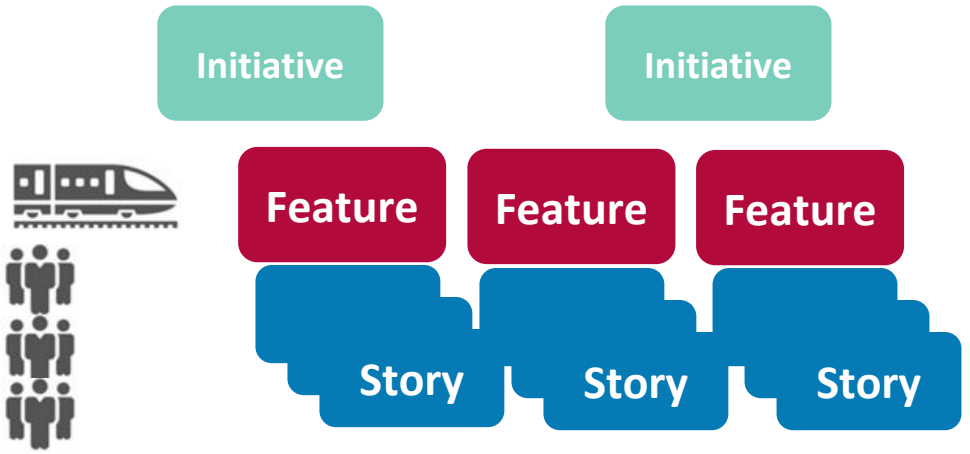



© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# Organizational Hierarchy

- Stream 1
  - ART 1
    - Team A
    - Team B
    - Team C
  - ART 2
    - Team D
    - Team E
  - ART 3
    - Team X





© 2015 CA. ALL RIGHTS RESERVED.

# Planning Timeboxes and Cadence

# Progressive Planning

Product leadership elaborates **Features** (from Initiatives).

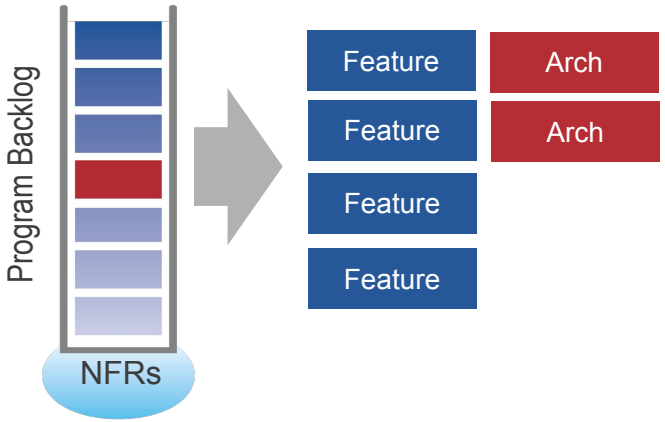
Programs plan **Features** into **Release Timeboxes** (fixed, recurring).

Teams (with Product Owners) break features down into **User Stories** which are planned into **Iterations** (Sprints).

Teams break stories down into **Tasks** to determine both what they can do in an iteration, and how they will do it.


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.
ca technologies

# Program Backlog (Features)




## Features are distinct functionality that fulfill user needs:

- Expressed as a phrase. Value is expressed in terms of benefits.
- Features are identified, prioritized, estimated, and maintained in the Program Backlog.
- *Feature* is an industry-standard term familiar to marketing and Product Management.
- Have defined scope, acceptance criteria.
- Are executed start-to-finish, as quickly as possible (completed within a release).


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Agile Release

A recurring program-level planning cadence (of fixed length).

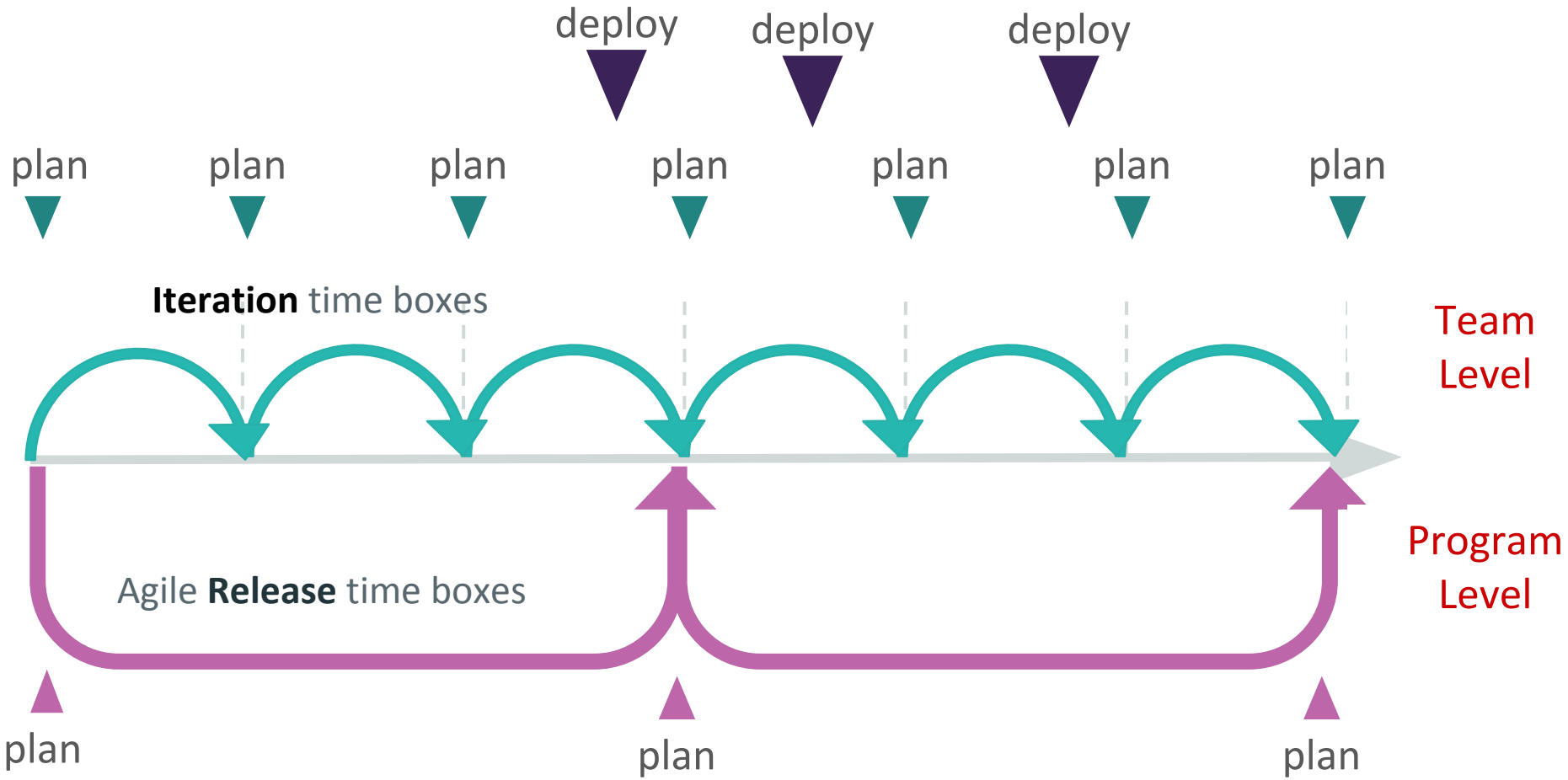
Not Version 1.1, 1.2, etc.

Just as Scrum **teams** plan and execute short **Iterations**, **Programs** plan and execute mid-range iterations called "**Releases**".

Through continuous integration, build management and feature toggles, functionality can be **Deployed** to customers as needed.


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.
ca technologies

# Program and Team Cadences

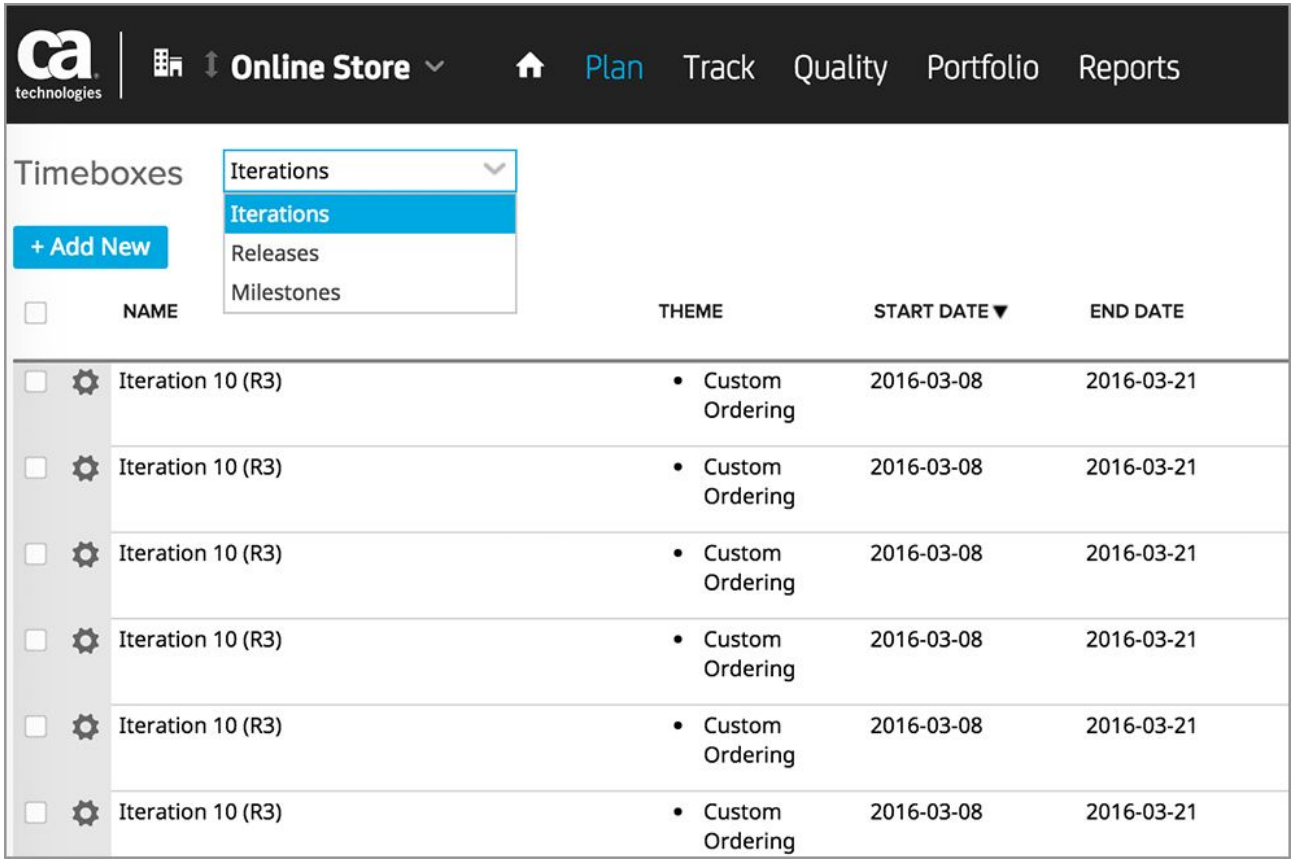





© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Timeboxes: Develop on Cadence



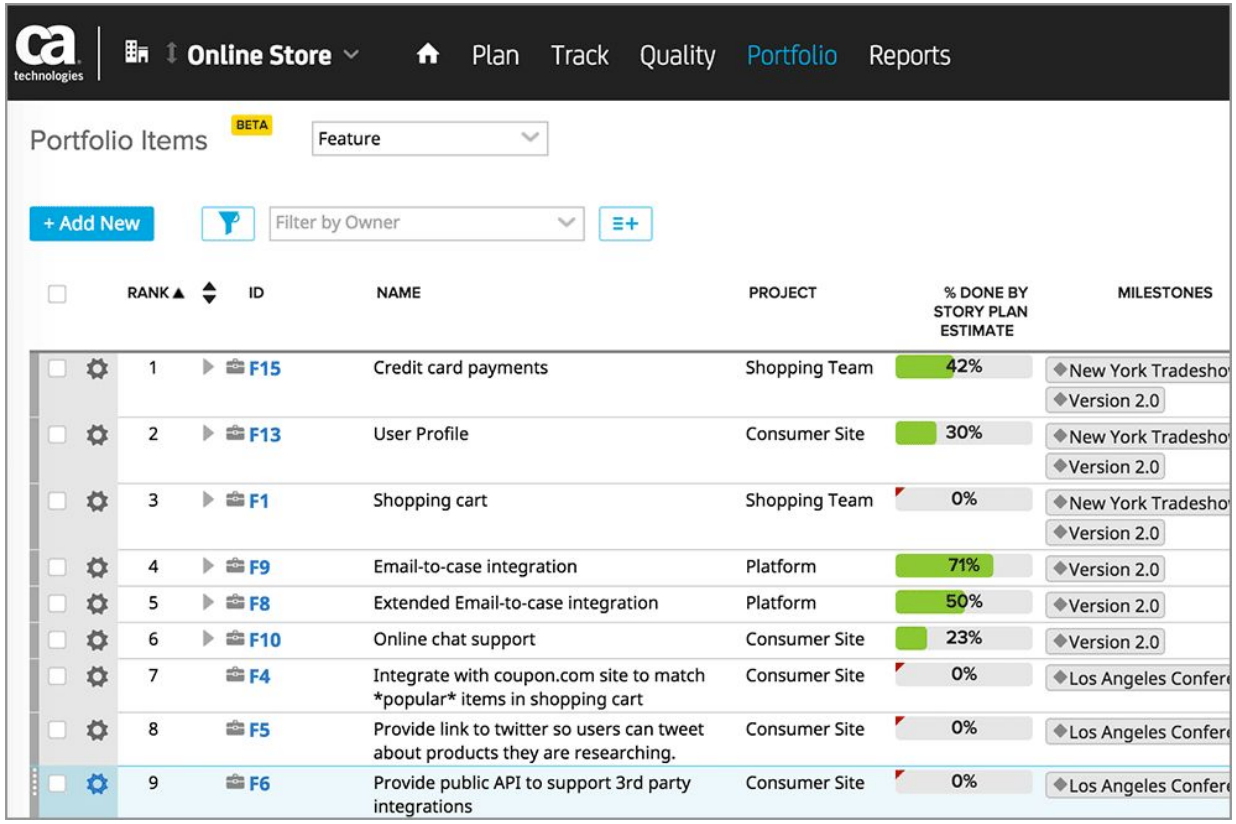

**Deliver working software, on time.**

In CA Agile Central, it's easy to set up your iterations, releases and delivery groups so you can release on cadence.



© 2016 CA. ALL RIGHTS RESERVED.

# Milestones: Deliver on Demand




**You can't reap the benefits of what your teams are building until you deliver it to your end-users.**

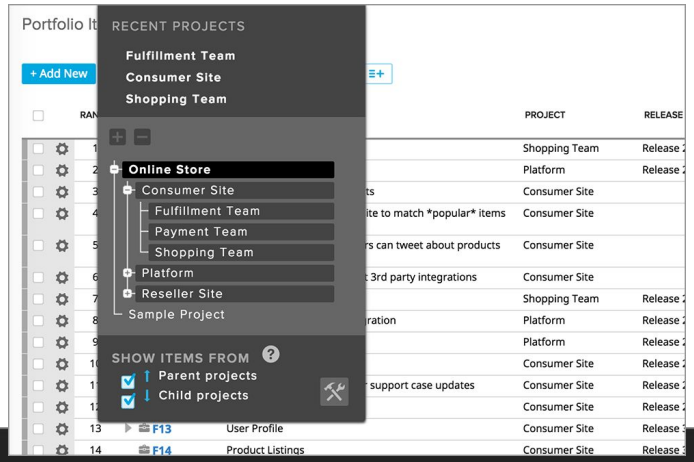
Milestones help you plan and track feature work to critical delivery dates.

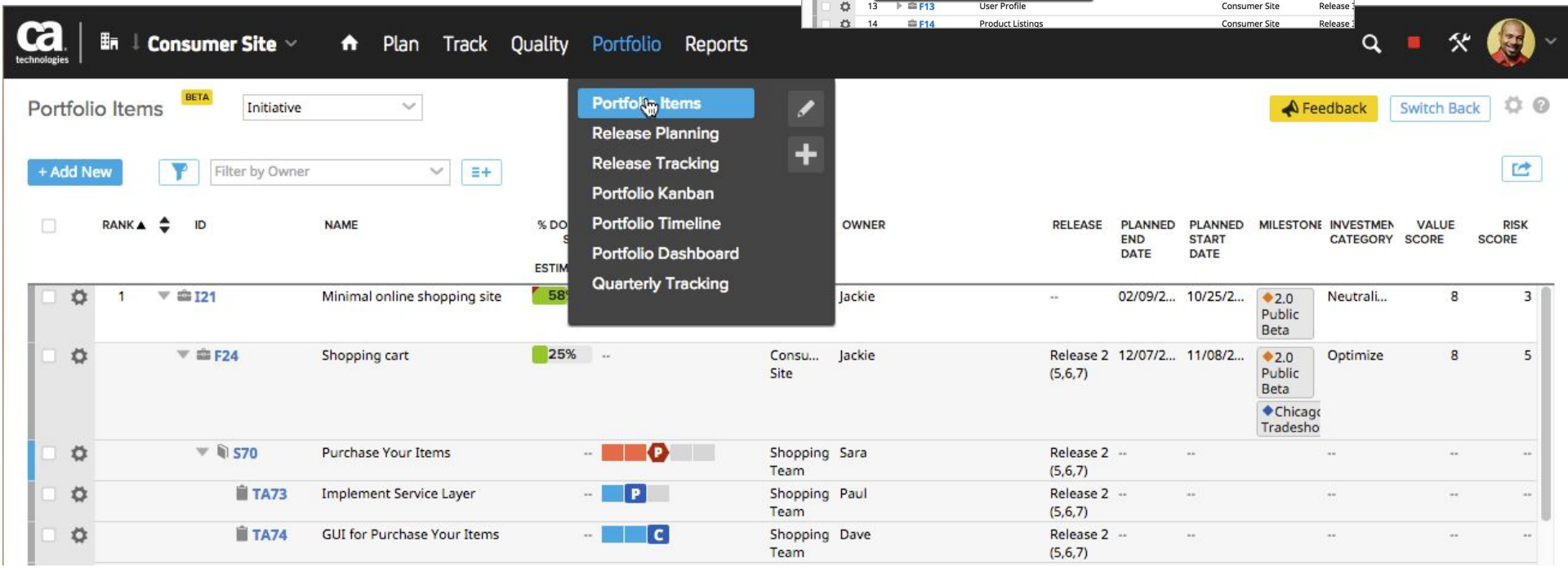
CA Agile Central is the only platform that lets you plan to both development releases and important business milestones.


© 2016 CA. ALL RIGHTS RESERVED.

# Defining your backlog from top to bottom
# Prepare - Plan - Track - Improve

# Backlogs: Create Backlogs at Every Level






© 2015 CA. ALL RIGHTS RESERVED.

# Defining Initiatives and Features

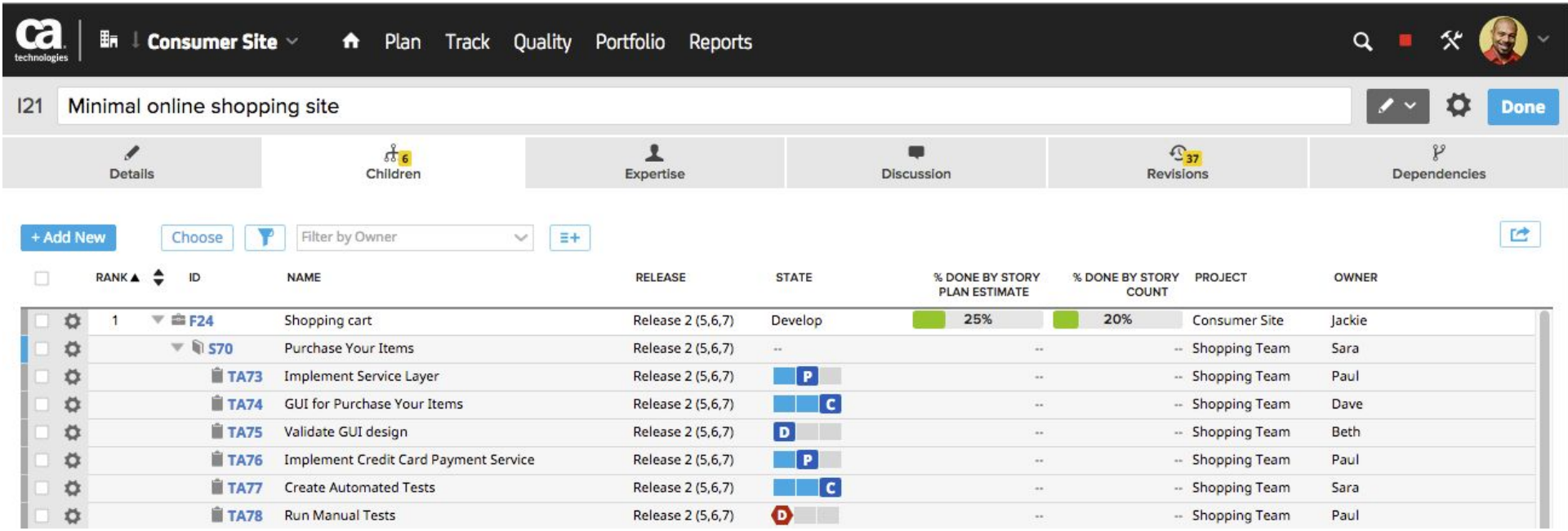
| | RANK ▲ | ID | NAME | % DONE BY STORY PLAN ESTIMATE | % DONE BY STORY COUNT | PRELI ESTIM |
|---|---|---|---|---|---|---|
| | | All | All | | | All |
| | 1 | I14 | Create a read-only API | 50% | 33% | M |
| | 2 | I21 | Minimal online shopping site | 63% | 44% | L |
| | 3 | I16 | Re-build primary web app to use API | 0% | 0% | XL |
| | 4 | I18 | Integrate into Facebook | 0% | 0% | L |



© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# Defining Initiatives and Features






© 2015 CA. ALL RIGHTS RESERVED.

# Prioritizing and managing Features Across Initiatives

Portfolio Items

+ Add New

Page Tools

Feature

Columns

Planned End Date
Value Score
Risk Score
Investment Category
Other Columns
Accepted Leaf Story Cour
Accepted Leaf Story Plan
Actual End Date
Actual Start Date
Apply

| | RANK | ID | NAME | % DONE BY STORY PLAN ESTIMATE | % DONE BY STORY COUNT | PRELIMINARY ESTIMATE | PLANNED START DATE | PLANNED END DATE | | |
|---|---|---|---|---|---|---|---|---|---|---|
| | All | | All | | | All | | | | |
| | 1 | F20 | Shopping cart | 33% | 20% | | 12/26/2013 | 01/24/2014 | | |
| | 2 | F4 | Priority shipping | 37% | 29% | M | 01/04/2014 | 02/03/2014 | | |
| | 3 | F25 | Order Status 2.0 | 60% | 50% | | 01/25/2014 | 02/03/2014 | | |
| | 4 | F6 | Knowledgebase | 100% | 100% | S | 12/12/2013 | 01/03/2014 | | |
| | 5 | F7 | Email-to-case integration | 100% | 67% | M | 12/20/2013 | 01/20/2014 | | |
| | 6 | F8 | Credit card payments | 100% | 100% | S | 12/12/2013 | 12/27/2013 | | |
| | 7 | F23 | Product Listings | 0% | 0% | M | 01/14/2014 | 02/12/2014 | | |
| | 8 | F24 | Epic: User Management | 58% | 44% | | | | 0 | 0 None |
| | 9 | F26 | Add error message if credit card number length is < 16 | 0% | 0% | | | | 0 | 0 None |
| | 10 | F28 | Service-Level Agreements | 45% | 57% | | 12/30/2013 | 01/12/2014 | 0 | 0 Optimize |
| | 11 | F5 | Online chat support | 0% | 0% | S | 01/20/2014 | 02/23/2014 | 5 | 3 Differentiate |
| | 12 | F21 | User Profile | 0% | 0% | | 01/11/2014 | 01/27/2014 | 0 | 0 Neutralize |
| | 13 | F22 | Outbound SMS messages for support case updates | 0% | 0% | S | 01/13/2014 | 02/02/2014 | 5 | 3 Differentiate |
| | 14 | F29 | Upgrade S4 payment gateway integration to v12.1 | 0% | 0% | M | 01/19/2014 | 03/02/2014 | 4 | 1 Optimize |

1 - 14 of 14

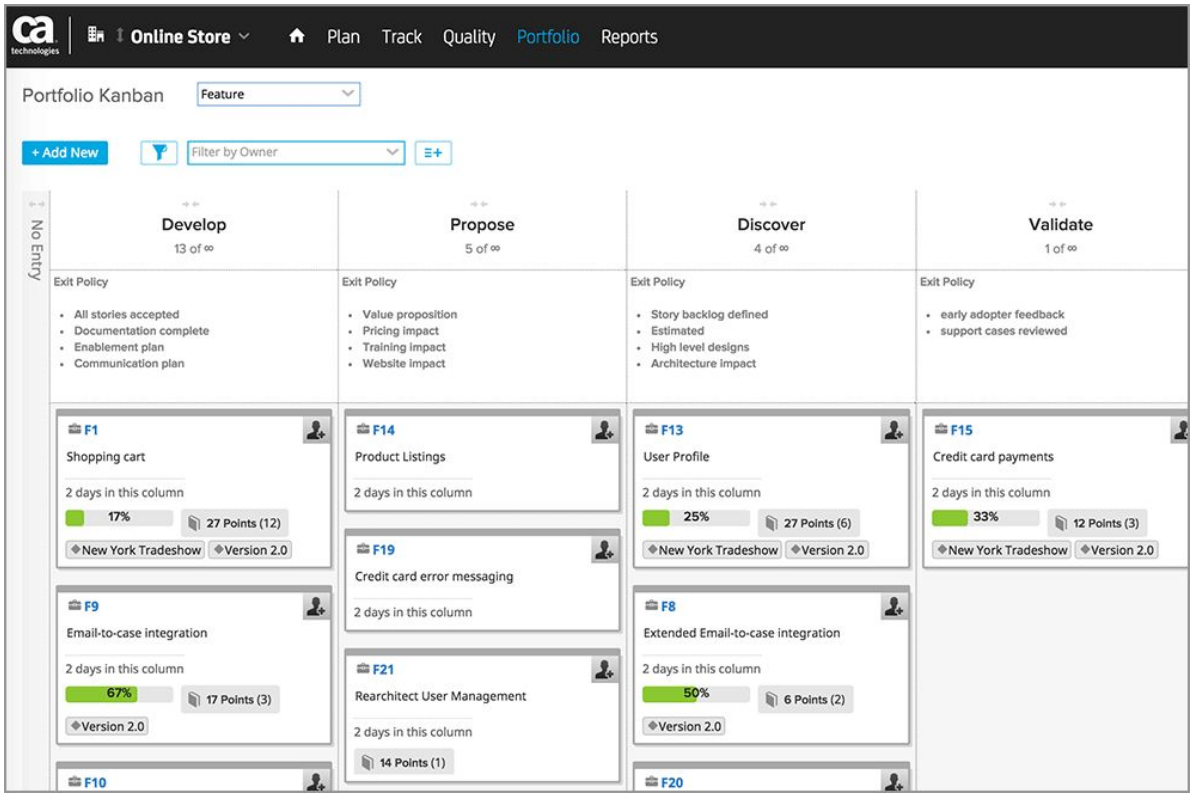
Showing 25 50 100 200 items



© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# Portfolio Kanban: Flow Value to Customers



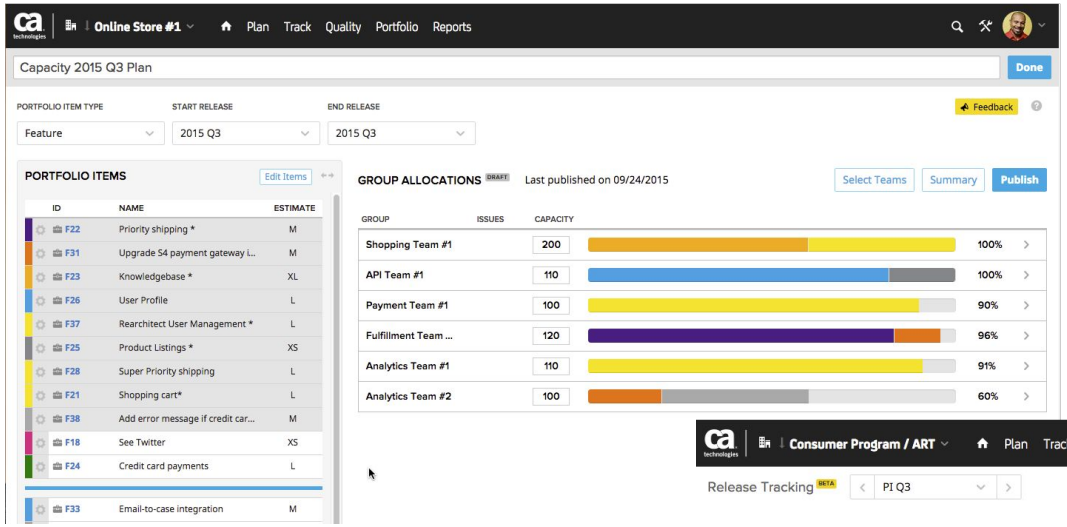

**What you build next will impact your bottom line.**

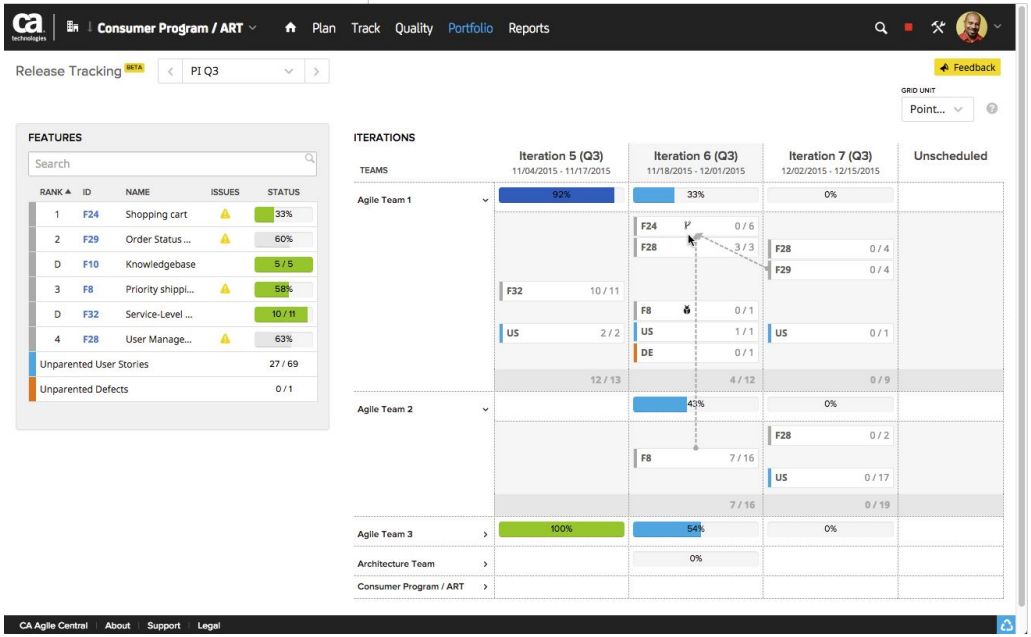
The CA Agile Central Portfolio Kanban helps you see work in process and bottlenecks, while prioritizing the flow of work from business analysis through implementation.

The CA Agile Central platform uniquely lets you configure your Portfolio Kanban view to support decision-making needs at every level.


© 2016 CA. ALL RIGHTS RESERVED.

# Planning and Tracking

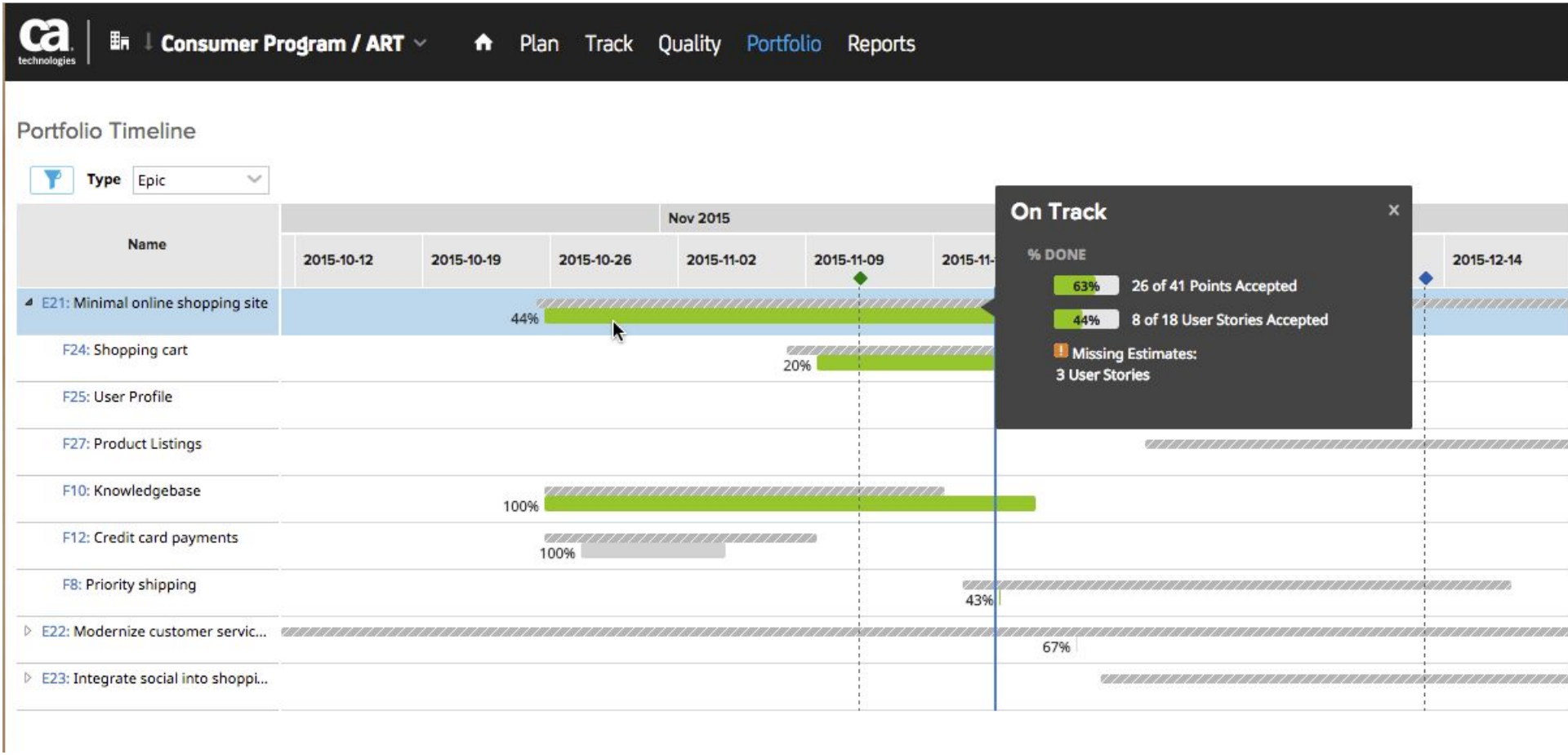





© 2015 CA. ALL RIGHTS RESERVED.

# Planning and Tracking



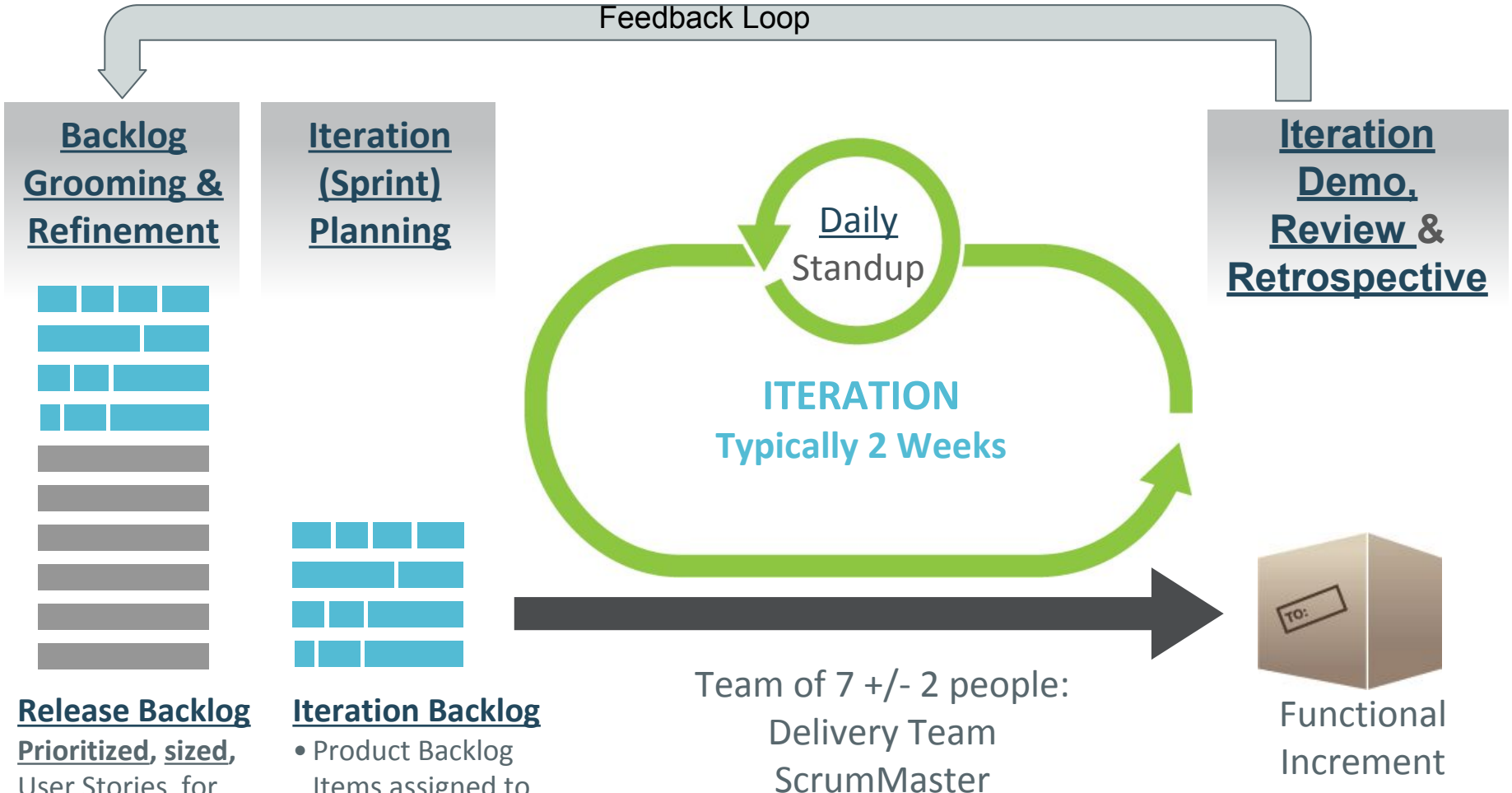



© 2015 CA. ALL RIGHTS RESERVED.

# Iteration Mechanism

# Iteration Mechanics

Tutorial Videos!




**Release Backlog**

**Prioritized**, **sized**, User Stories for Features desired by customer and planned for the next release

**Iteration Backlog**

- Product Backlog Items assigned to Iteration
- Emergent list of estimated tasks

Team of 7 +/- 2 people:
Delivery Team
ScrumMaster
Product Owner

Functional Increment



© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

ca technologies

# Team Backlog Elaboration / Refinement

# The Team's Responsibility

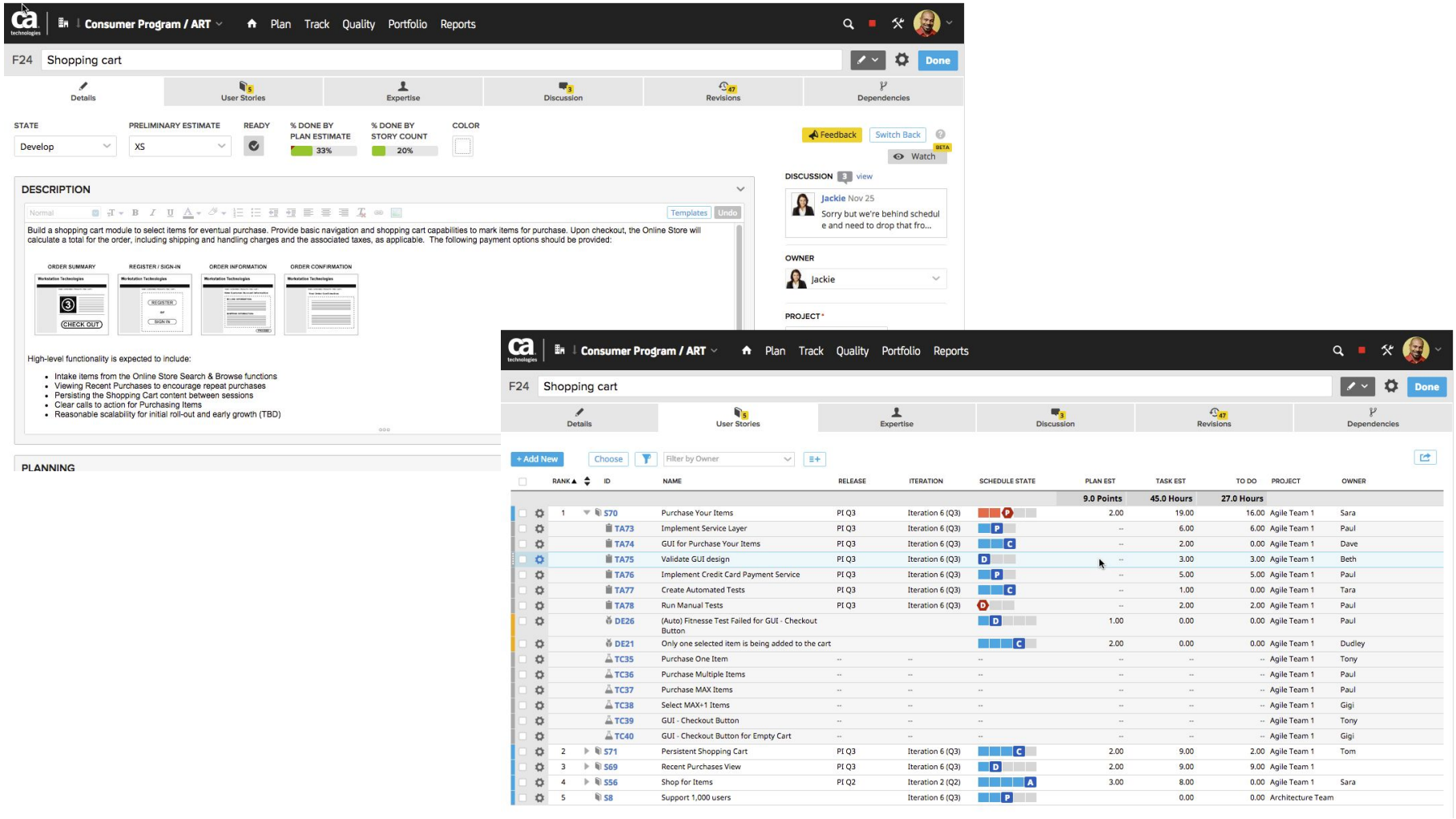
The Team (Delivery Team with a Product Owner) is responsible for:

- Elaborating features into User Stories for implementation
- Elaborating User Stories sufficiently that the team understands how to build them (Acceptance Criteria, Size, Tasks)
- Determining how user stories should be sequenced into iterations

"An Agile Team is an engine that turns Features into deployable functionality quickly and predictably."


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# Elaborating Features for Team Planning and Execution






© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# Backlog Refinement / Grooming

## Common Mistakes

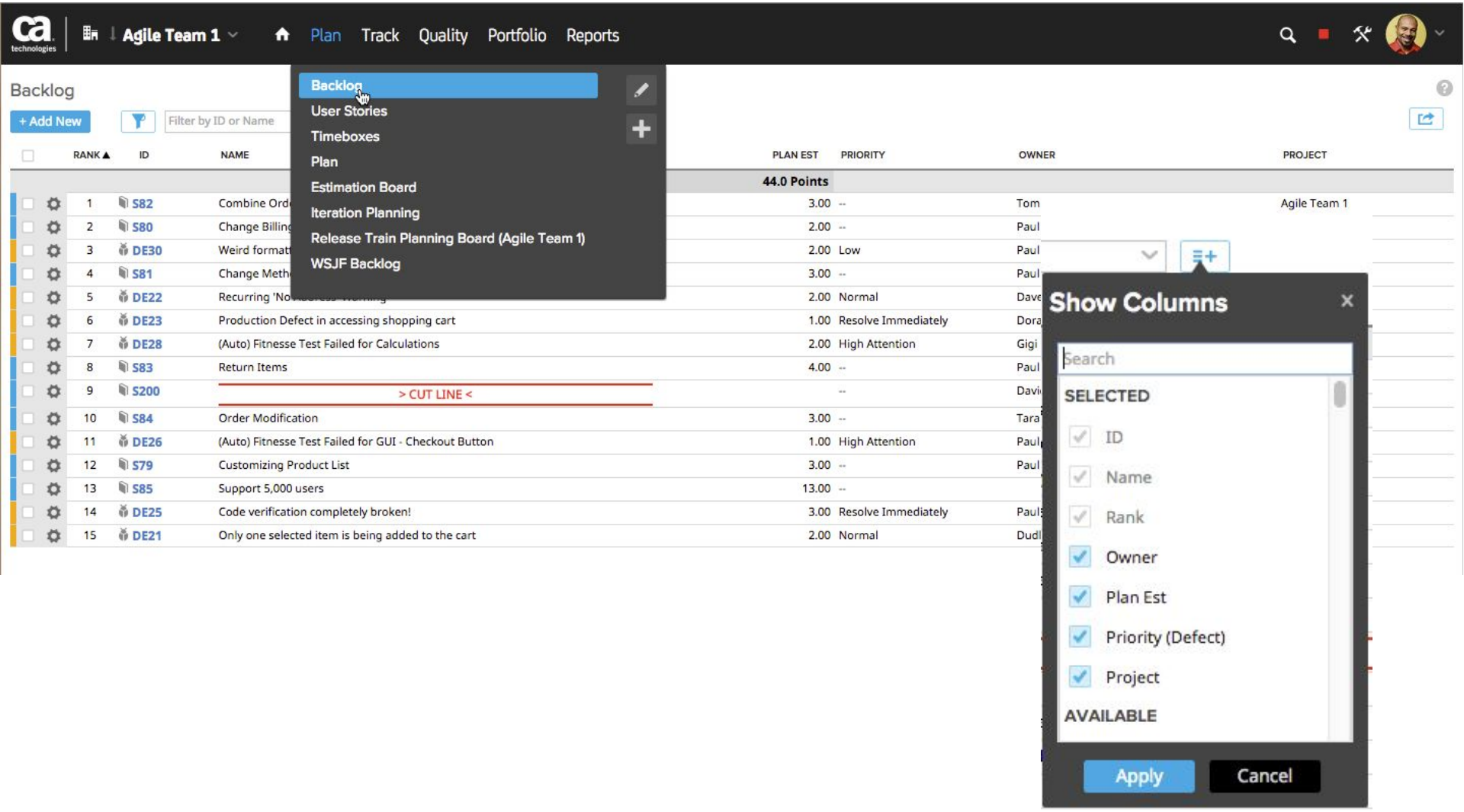
- Not Grooming
- Grooming with a subset of the team
- Attempting to groom too much too fast

## Tips

- Team and PO agree on a Definition of Ready
- Use Definition of Ready to guide grooming
- PO and Delivery team together to refine stories
- ~ 2 iterations of work groomed and ready
- Discuss stories more than once
- Grooming takes time.  Schedule it into the capacity of your iterations.  Rule of thumb: 1 hour 2x per week


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.
ca technologies

# Backlog

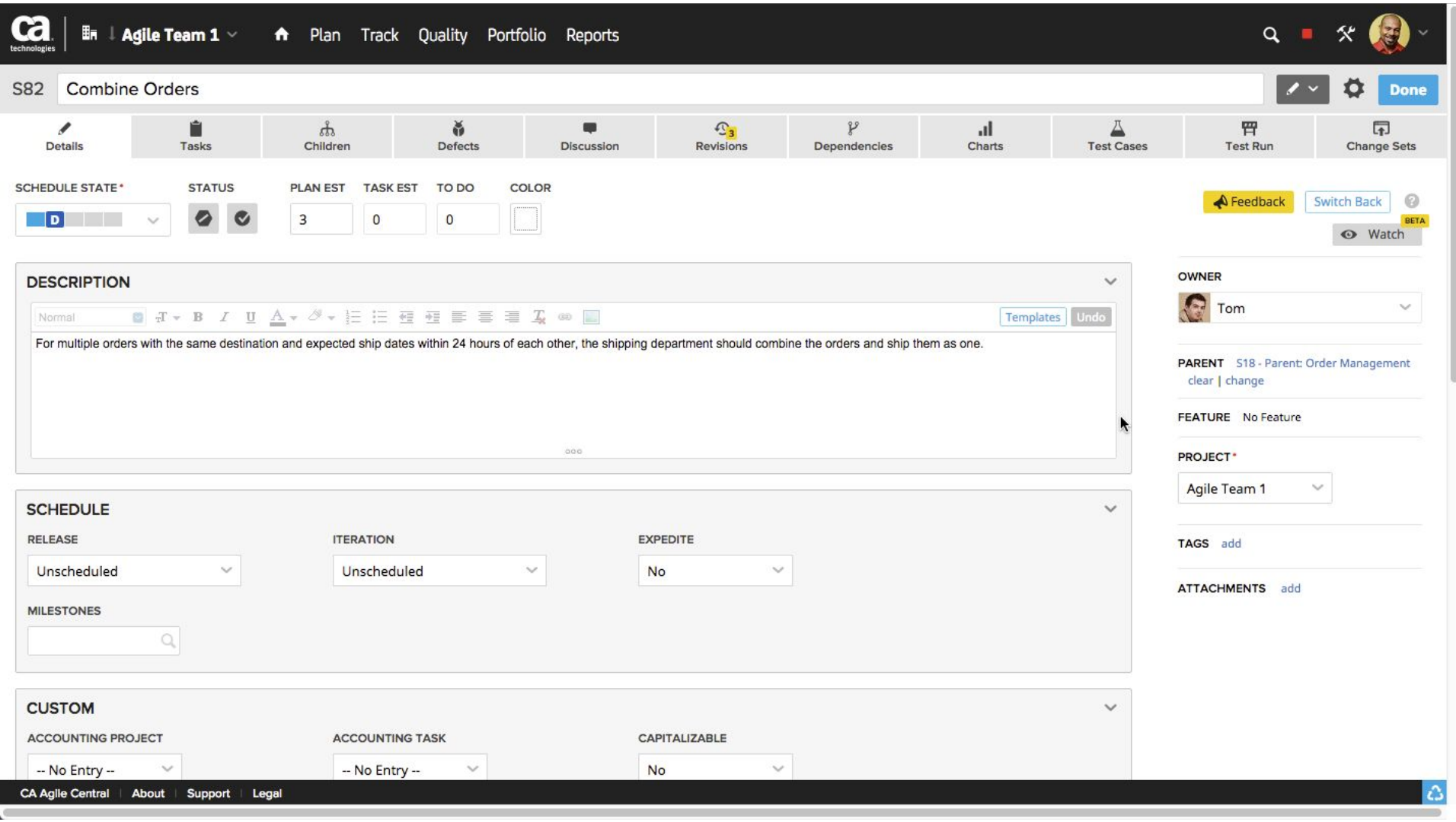





© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# User Story

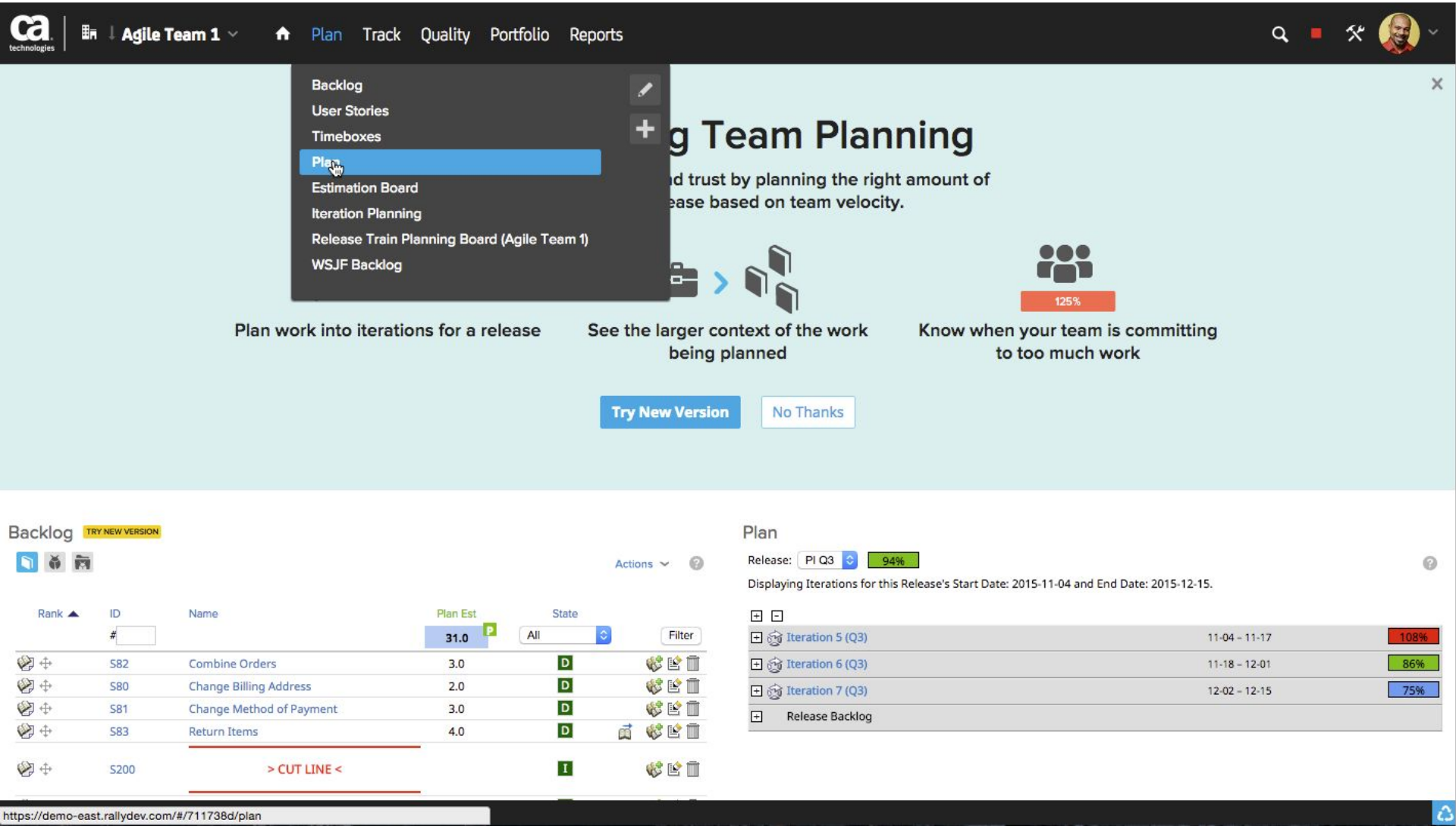





© 2015 CA. ALL RIGHTS RESERVED.

# Iteration Planning and Execution

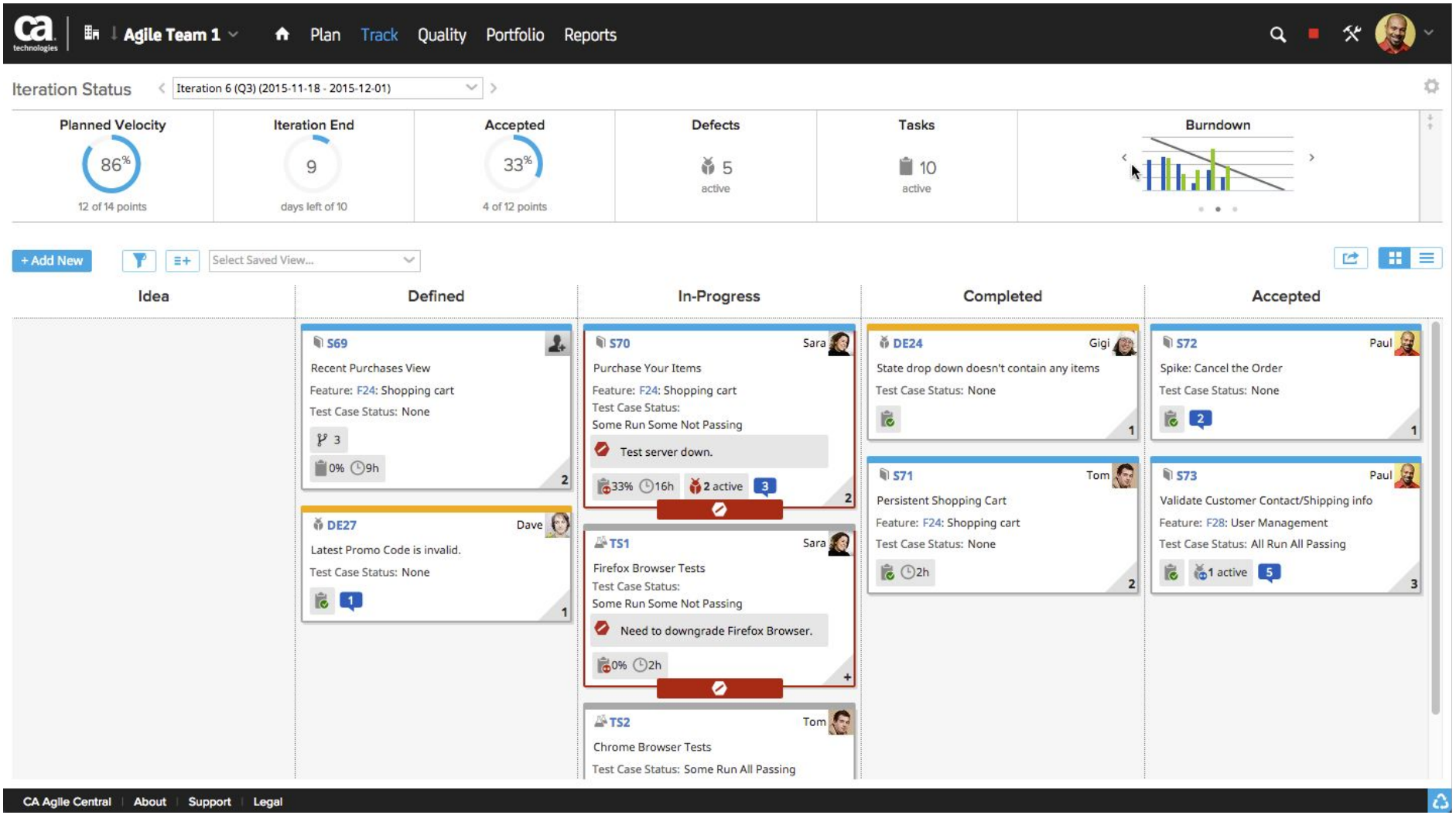
# Plan





© 2015 CA. ALL RIGHTS RESERVED.

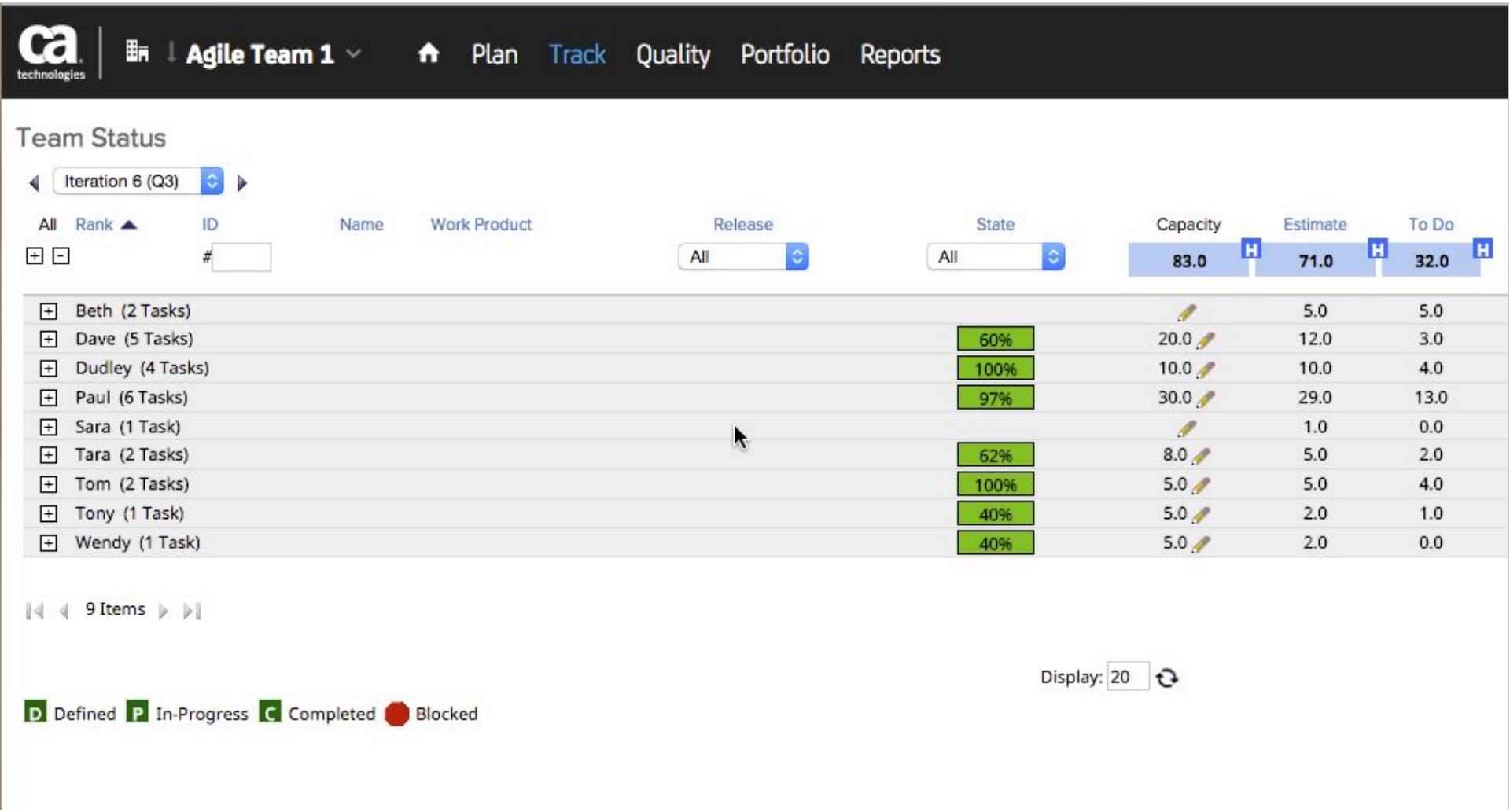
# Team Capacity Planning and Iteration Execution






© 2015 CA. ALL RIGHTS RESERVED.

# Team Capacity



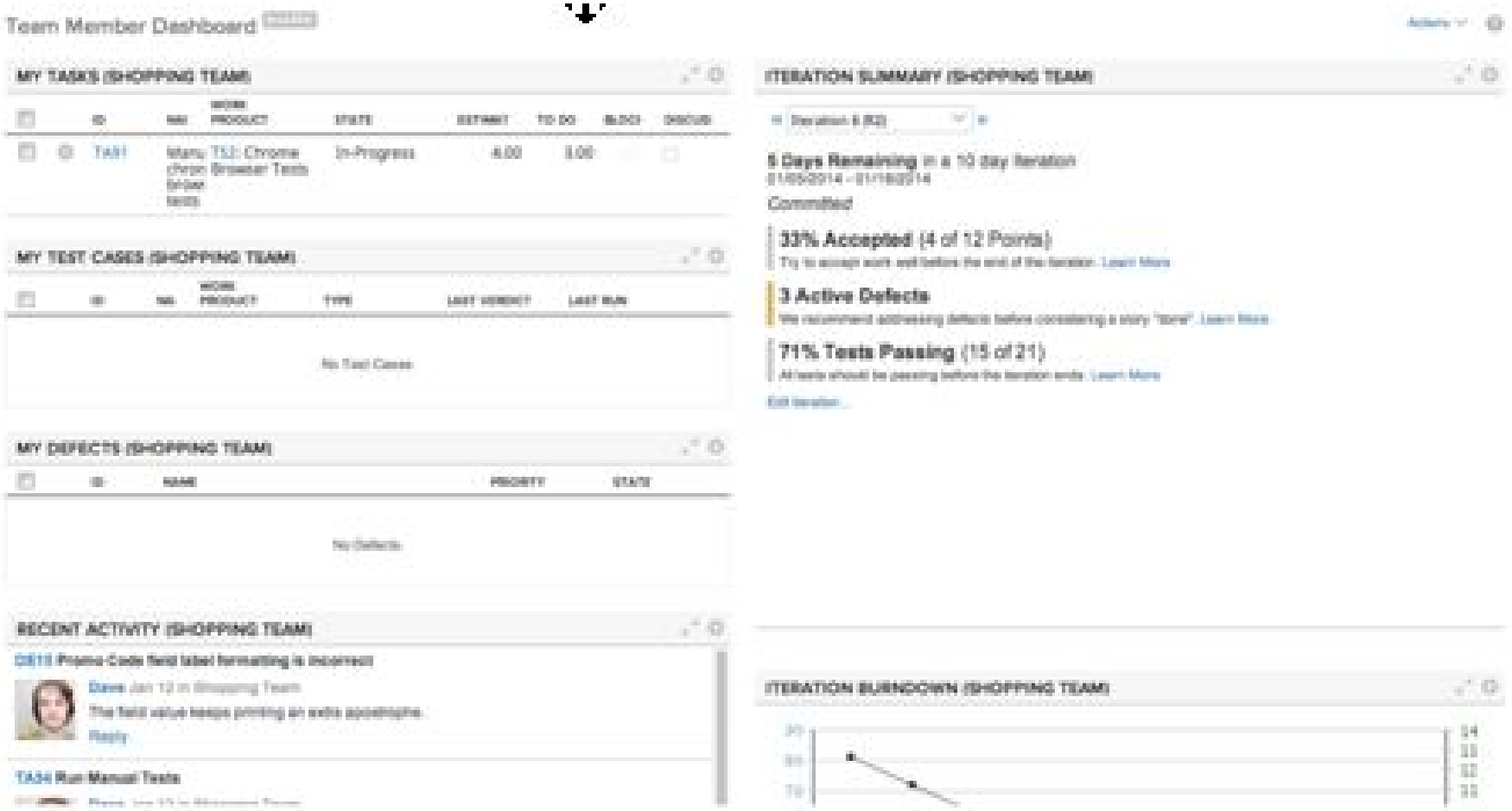



© 2015 CA. ALL RIGHTS RESERVED.

# Dashboards and Reporting

# Dashboards & Reporting

## Examples






© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

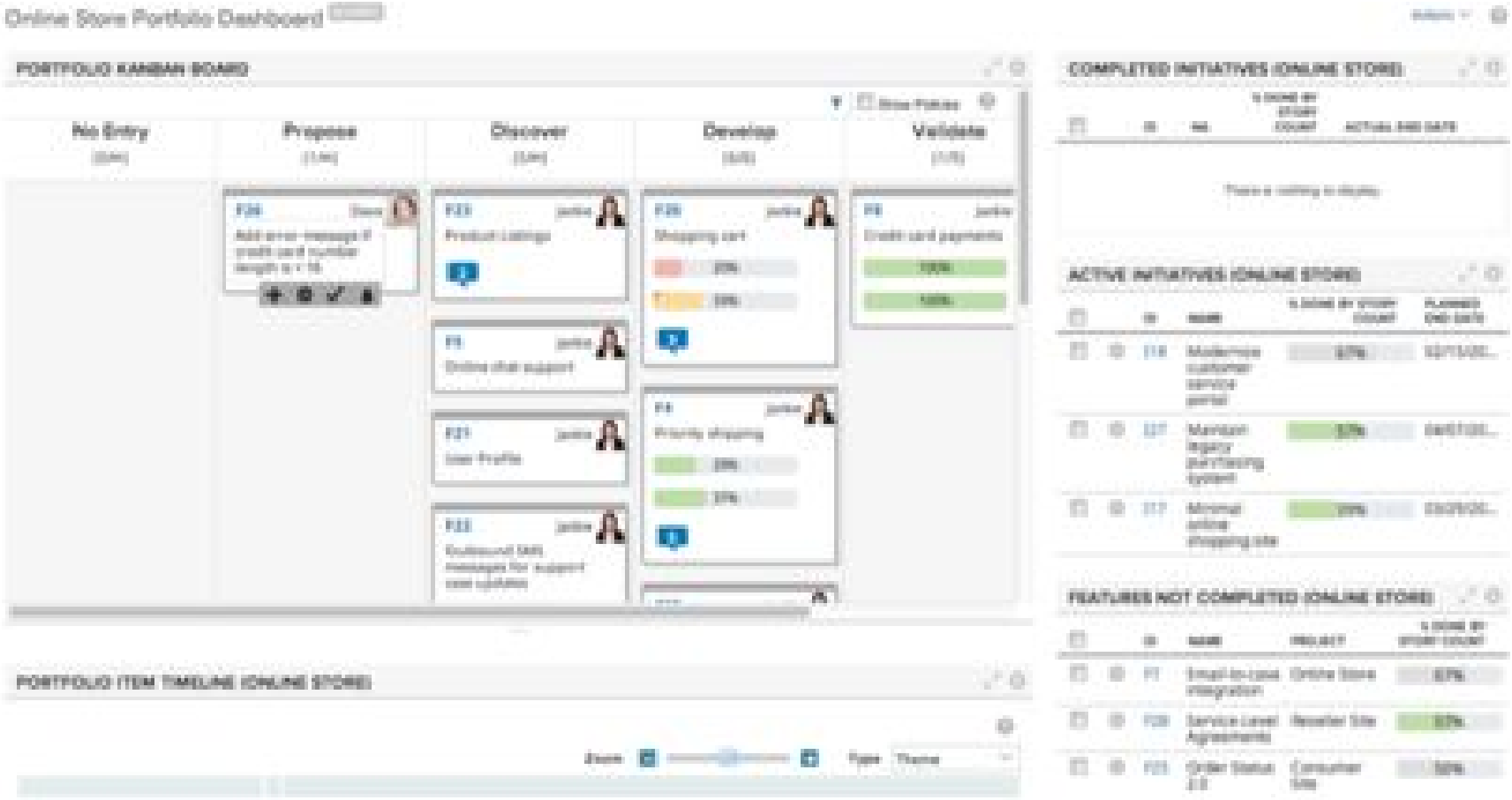
# Dashboards & Reporting

Examples

© 2015 CA. ALL RIGHTS RESERVED.

# Dashboards & Reporting

Examples



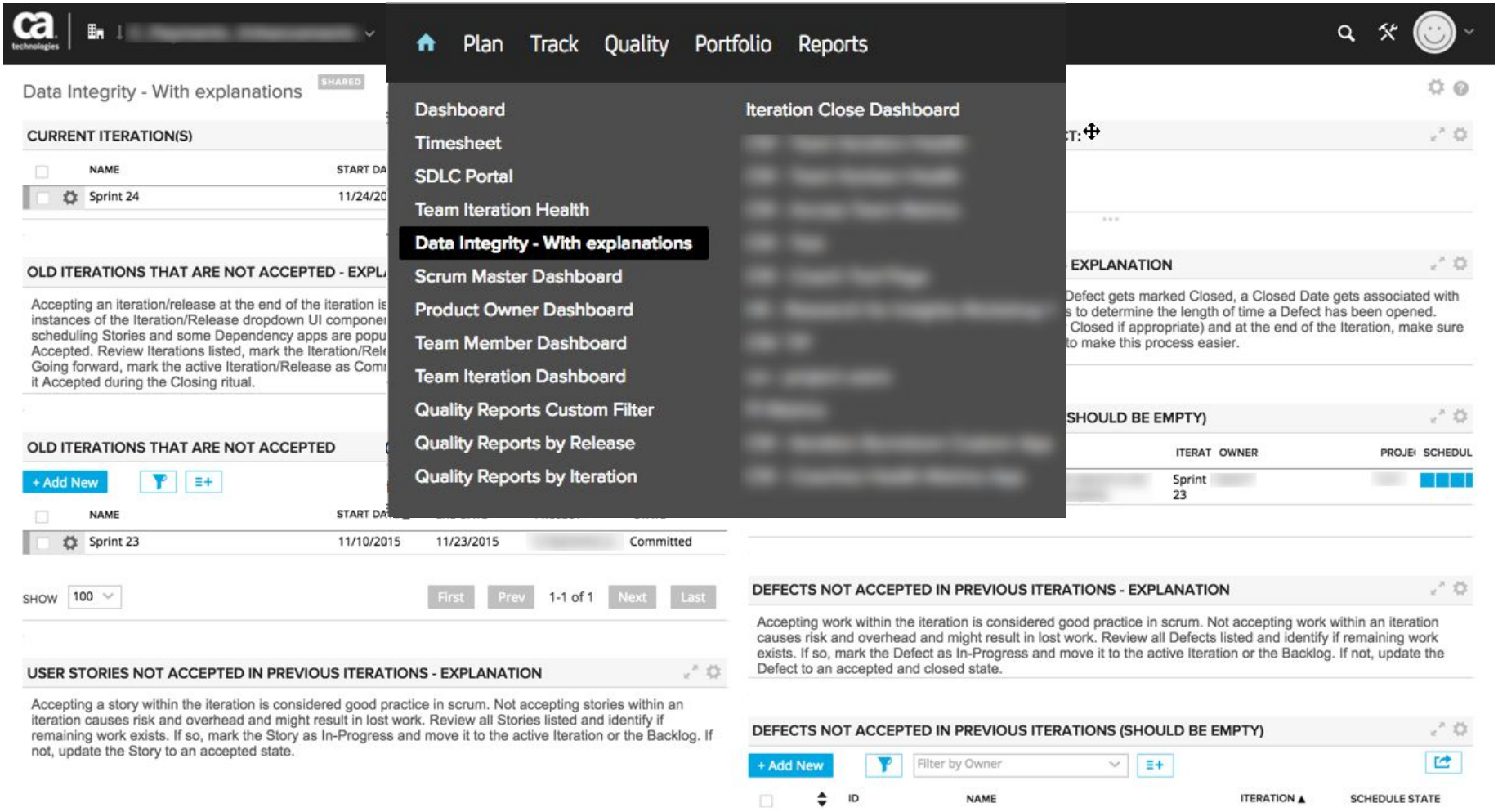



© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# Dashboards & Reporting

## Available in your workspace

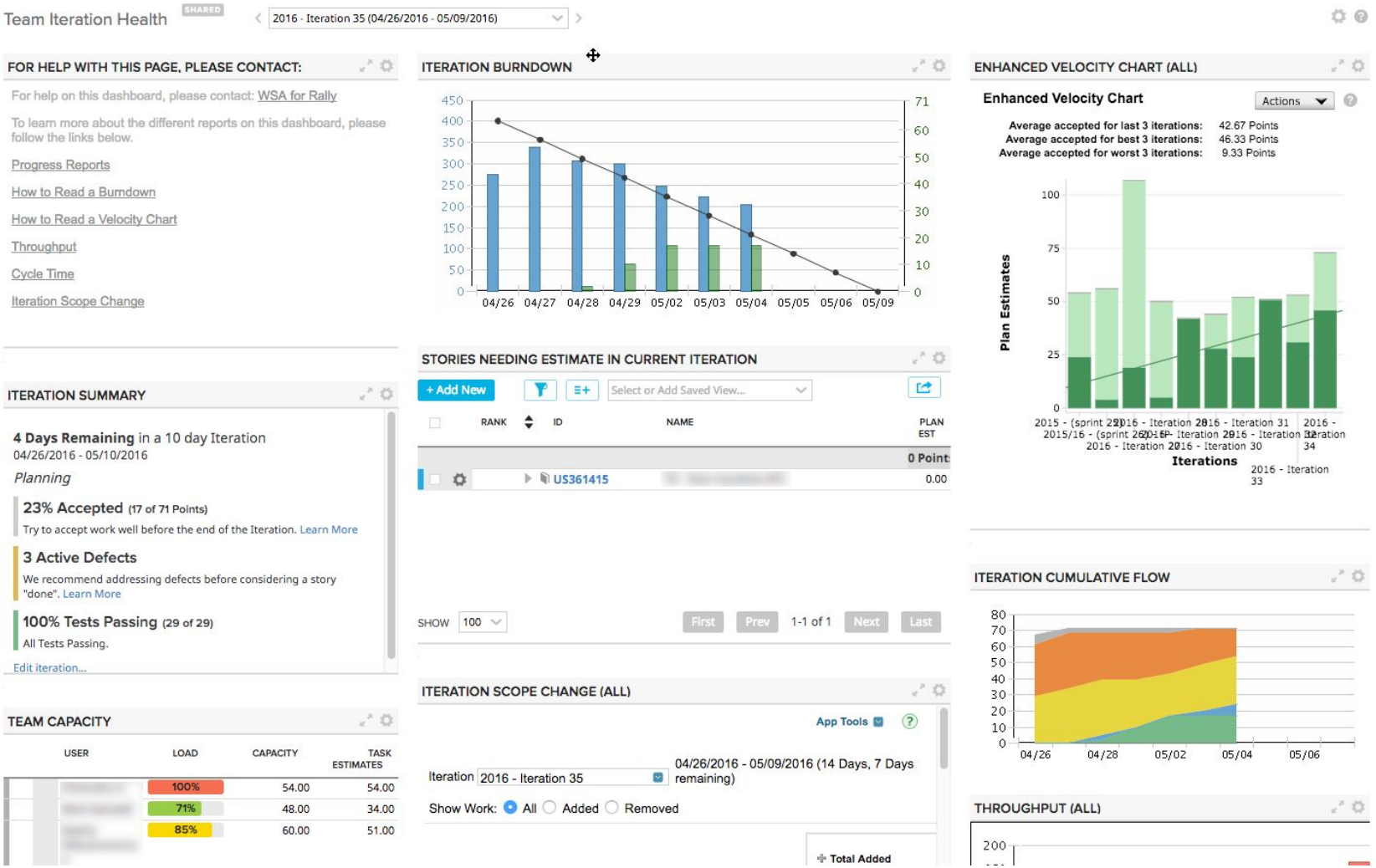





© 2015 CA. ALL RIGHTS RESERVED.

# Dashboards & Reporting

## Examples






© 2015 CA. ALL RIGHTS RESERVED.

ca technologies

# CA Agile Central Help and Resources

## Videos

Agile Practices: https://help.rallydev.com/watch-tutorials
Product Tutorials: https://help.rallydev.com/agile-video-tutorials
Youtube: https://www.youtube.com/
Webinars: https://www.rallydev.com/agile-webinars

## Blogs and Documents

Blog: http://blogs.ca.com
CA Agile Central Help: https://help.rallydev.com/
Agile Basics: https://help.rallydev.com/learn-agile
https://help.rallydev.com/coaching-corner

## CA Agile Central Support

Community: https://rallycommunity.rallydev.com/
(Discussions, Groups, Questions)
Support Request: https://rallycommunity.rallydev.com/cases/new

## Technical / Developer

Integrations and Connectors:
https://www.rallydev.com/integrations

Custom Apps:
https://github.com/Rallyapps
https://github.com/rallycommunity

Excel Add-in:
https://help.rallydev.com/rally-add-excel

App Developer SDK:
https://help.rallydev.com/for-developers
https://help.rallydev.com/apps/2.0/doc/

Web Services API (must be signed in):
https://rally1.rallydev.com/slm/doc/webservice/


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# CA Agile Central Help and Resources

## More Product Videos

Set up:
https://help.rallydev.com/sites/default/files/multimedia/videos/gsadmin/projects_explain/index.html

Time Boxes:
https://help.rallydev.com/sites/default/files/multimedia/videos/gsadmin/timeboxes_demo/index.html

Portfolio Items:
https://help.rallydev.com/sites/default/files/multimedia/videos/gsadmin/pi_explain/index.html

https://help.rallydev.com/sites/default/files/multimedia/videos/gsadmin/portfolioHierarchy_demo/index.html

## Webinars

https://www.rallydev.com/agile-webinars
https://www.brighttalk.com/channel/6505/ppm-agile-redefining-planning-execution

## On Demand Classes

CA Agile Basics:
CA Agile Basics (Formerly Rally Essential on Demand)

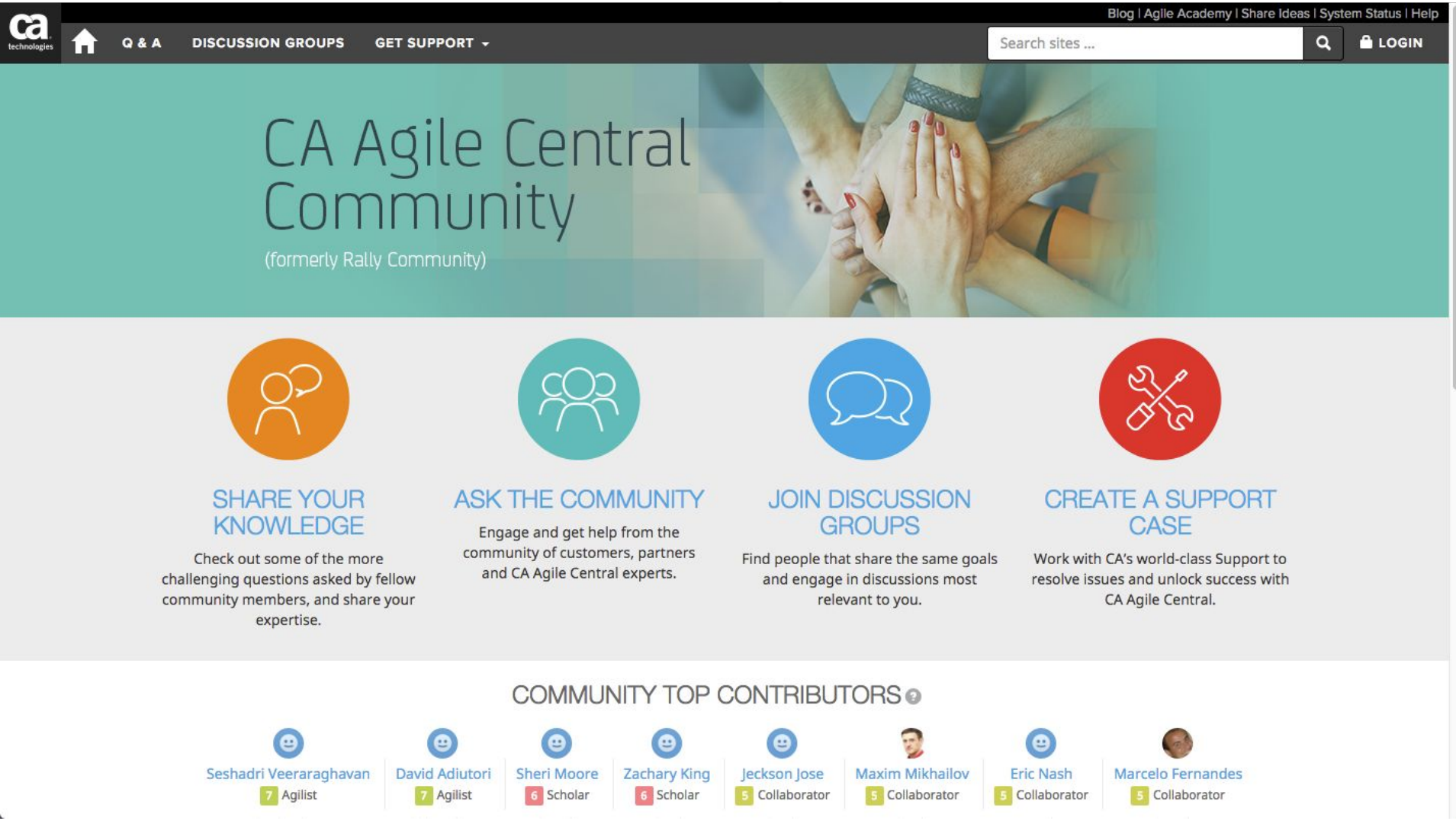
## Amex links

Rally Rules of the Road:
American Express Rally Rules of the Road

Spot:
https://teams.aexp.com/sites/tt_spot/SitePages/SDLC-LandingPage.aspx


© 2015 CA. ALL RIGHTS RESERVED. CA CONFIDENTIAL AND PROPRIETARY INFORMATION; FOR INTERNAL USE ONLY. NO UNAUTHORIZED USE, COPYING OR DISTRIBUTION.

# CA Agile Central Community





© 2015 CA. ALL RIGHTS RESERVED.

# What Questions Do You Have?

# Thank you!

**Carolina Weibring**
carolina.weibring@ca.com
Technical Account Owner
Agile Success Program

https://twitter.com/CAinc

http://www.slideshare.net/cainc

https://www.linkedin.com/company/ca-technologies

**www.ca.com**