



IBM Rational Collaborative Lifecycle Management

RTC Project Management

How to set up projects
using RTC

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Planning a Project

1 Preliminaries

When a Project Area is created to the standard followed in this guide, i.e. as part of an Analyst / Developer Lifecycle Project, the following default set of Plans is also created:

- Product Backlog
- Release Backlog
- 2 x Sprint Backlogs.

In agile methodology, a backlog is a collection of Stories to be completed. A Story is an element of functionality expressed as a story, for example “as a user, I want to be able to log in with a username and password”.

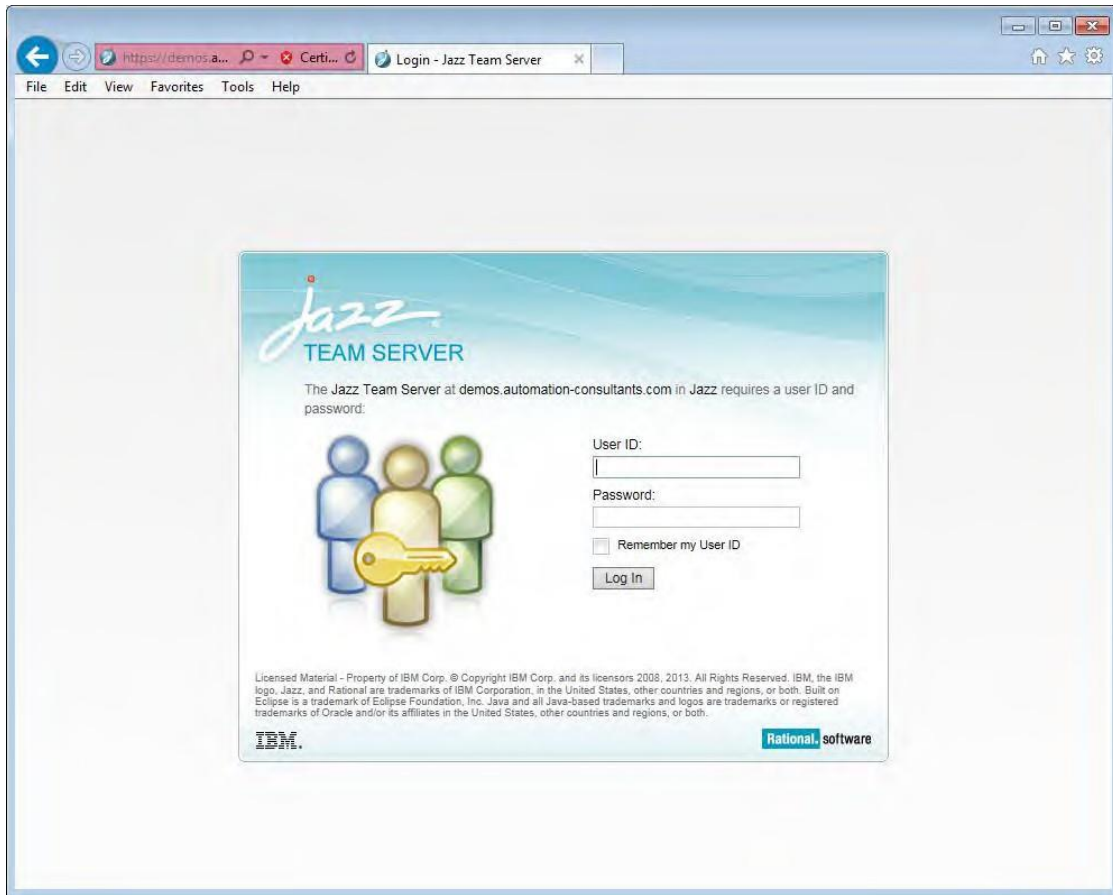
The Product Backlog is a collection of Stories which must be implemented to build the desired software product. The Release Backlog is the collection of Stories which must be implemented in order to build a particular Release of the product. When a Release is planned, stories are moved from the Product backlog to the Release backlog.

A sprint is an agile term describing a short period of development activity, normally 2-4 weeks long. A sprint is designed to build working software, as opposed to non-working parts of a larger whole, and the items delivered in a sprint are usually tested and shown to the Product Owner at the end of the sprint. This gives the opportunity for defects to be spotted early and for regular changes of direction if necessary. One of the main reasons for short sprints is to minimise the possibility of a major divergence between what the customer wants and what the development team is delivering.


2 Accessing the Project Area

Access to RTC is by means of a web browser.

The login screen looks as shown below.



Once at the login screen, follow the steps below to access RTC.

| Step no. | Action | Expected Result |
|----------|---|---|
| 1 | Log in with Jazz credentials supplied by CLM administrator. | Your dashboard is displayed, similar to a home page on the Jazz platform. |
| 2 | Click the right-hand part of the home button () at top left. | A drop down menu appears beneath the home button. One of the items in this menu is Change and Configuration Management. |
| 3 | Expand the Change and Configuration Management item by clicking the small triangle at its left. | The Change and Configuration Management item within the menu expands showing links labelled 'My Projects' and 'All Projects' |
| 4 | Click 'My Projects' | A list of Project Areas of which the user is a member will be displayed. The last item on this list will be called All Projects |
| 5 | Click the link All Projects | A page showing all the user's RTC Project Areas will be displayed. This is the entry point to RTC. |
| 6 | Click on the desired Project Area | The Project Area dashboard is shown. |



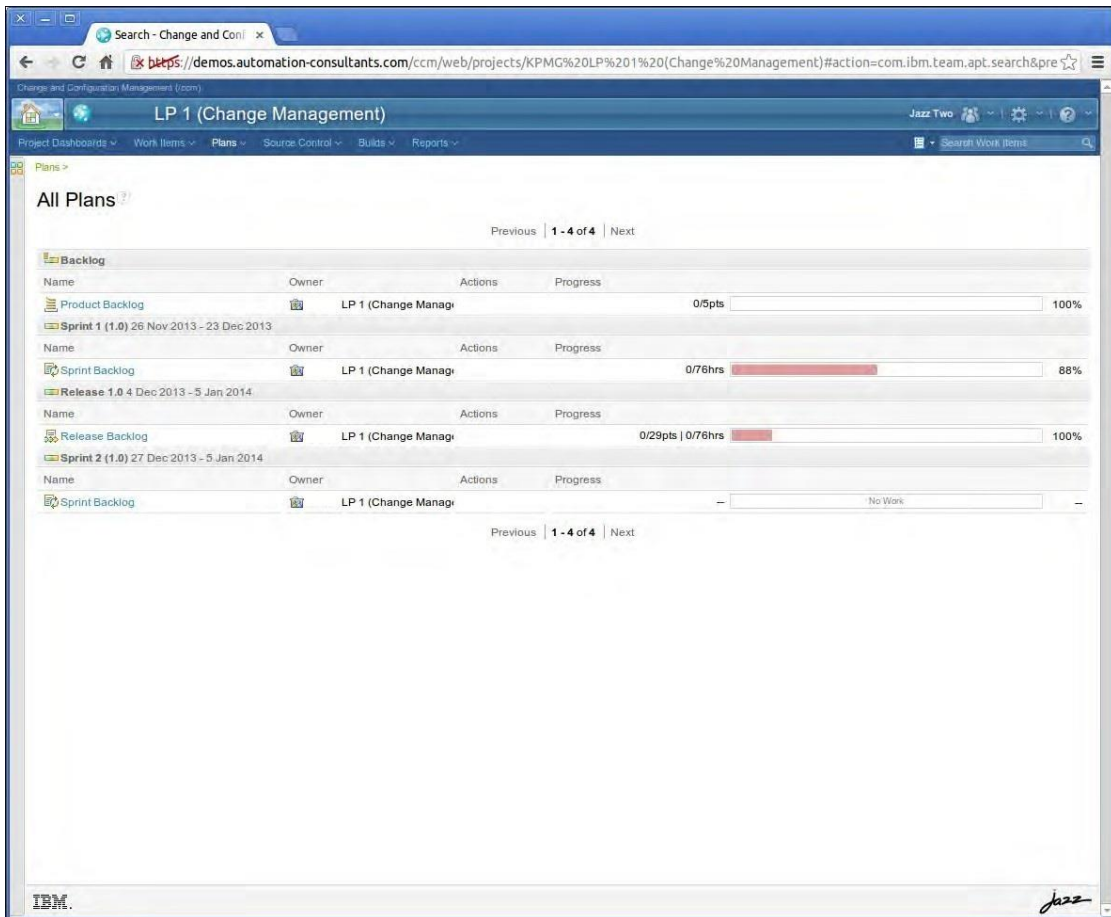
3 Populate the Product Backlog

3.1 Create Stories

In planning an agile project in RTC, the first task is to populate the Product Backlog with Stories. Note that the Product Backlog may already have been populated by Stories created from requirement Artifacts in RRC.

To begin populating the Product Backlog, follow the steps below.

| Step no. | Action | Expected Result |
|----------|---|--|
| 1 | Log on as a Product Owner using the steps described in section 2 above. | The Project Area dashboard is shown. |
| 2 | Click the Plans menu and choose All Plans. | The All Plans screen appears, showing the plans of the project (see screenshot below). |

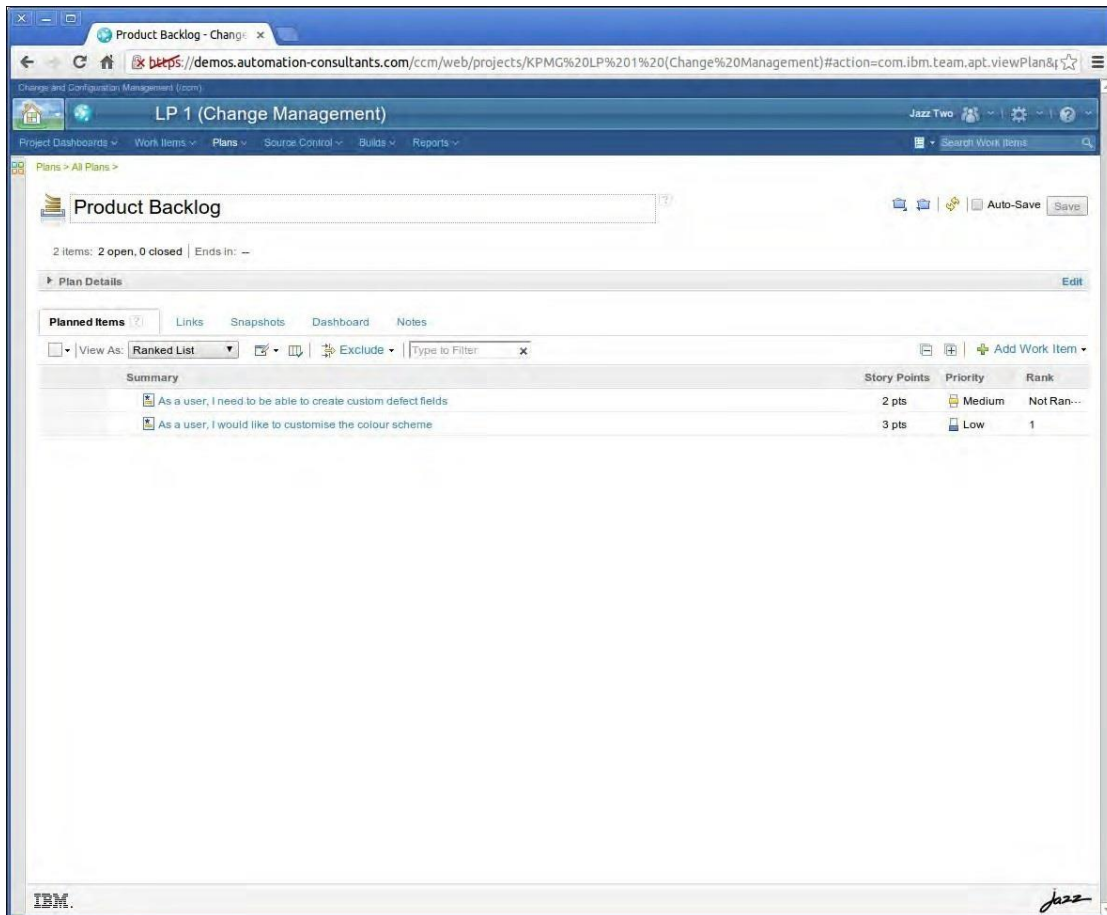



You should see all the Plans mentioned in section 1 above, namely:

- Product Backlog
- Release Backlog
- 2 x Sprint Backlogs.

Note also that in RTC terms **a Backlog is a Plan**.

| | | |
|---|---------------------------|---|
| 3 | Click the Product Backlog | The Product Backlog opens (see screenshot below). |
|---|---------------------------|---|



| | | |
|---|---|---|
| 4 | Click the down arrow towards the right of the Add Work Item button () | A drop down menu appears. |
| 5 | Choose Story from the menu | A new Story line is added to the list of stories, with the summary editable. The whole line is shaded yellow. |
| 6 | Type a Story summary in the summary field and type <Enter> | The typed title appears in the field. |
| 7 | Click Save | The Story is saved and the yellow shading disappears. Note that you can add multiple stories in this way without saving, and then click Save once to save them all. |

3.2 Assign Priority and Estimate Effort


The Story should now have a priority assigned and also an initial estimate of difficulty.

3.2.1 Assign Priority and Rank

To assign a priority to a Story, follow the steps below:

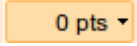
| Step no. | Action | Expected Result |
|----------|---|---|
| 1 | In the Product Backlog, click in the Priority column of the newly created Story. It should read 'Unassigned'. | A dropdown menu appears, showing a list of priorities. |
| 2 | Choose a suitable priority from the options 'Low', 'Medium' and 'High'. | The newly chosen priority is shown in the Story's Priority column, and the Story is shaded yellow. |
| 3 | Click Save | The yellow shading disappears and the new Priority value is saved. Note that it is possible to make multiple changes of priority and then save them all at the end. |

The Stories are normally ranked by priority. Within a priority, the Stories are ordered by Rank. The Ranks begin as the order in which the Stories were created. To move a Story up or down

the rankings, simply drag it by the grip on the left of the line () and move it to the desired rank in the list. This has to be among Stories of the same priority. If the story is dragged into an area containing Stories of another priority, its priority will change to the priority of the Stories among which it is dropped.

3.2.2 Estimate Effort

The effort required to implement a Story is measured in points. The Product Owner makes a first estimate of the effort. To estimate the effort of the newly added Story, follow the steps below.

| Step no. | Action | Expected Result |
|----------|--|---|
| 1 | In the Product Backlog, mouse over the Story Points column of the newly created Story. It should read '0 pts'. | A button appears (). |
| 2 | Click the small arrow toward the right of the button. | A dropdown menu appears, showing a list of options of the number of points to assign to the Story. |
| 2 | Choose a suitable number of points from the menu. | The newly chosen number of points is shown in the Story's Story Points column, and the Story is shaded yellow. |
| 3 | Click Save | The yellow shading disappears and the new Story Points value is saved. Note that it is possible to make multiple changes of Story Points and then save them all at the end. |


This estimate will be reviewed by the Scrum Master and Developers later.

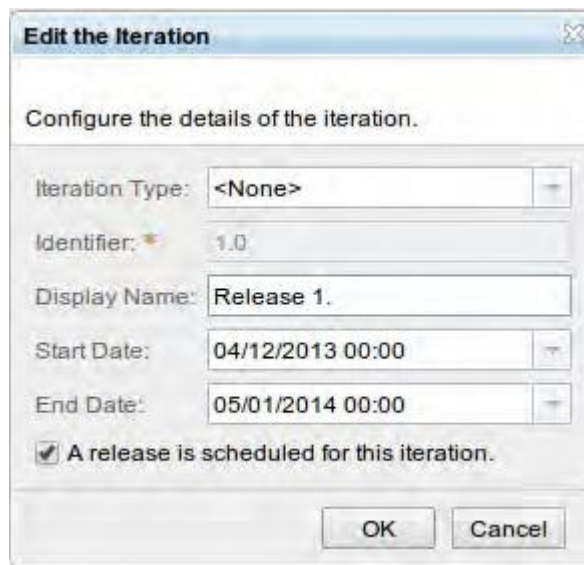
4 Set the Release Dates

The Product Backlog, (labelled as Backlog), does not have a schedule. A timeline is not needed for that Plan because it is simply a repository for all the functionality which might be desirable to include in the product. To implement functionality, the necessary Stories must be moved out of the Product Backlog and into another Plan.

As described in section 1 above, the Project Area has the following Plans (in addition to the Product Backlog): a Release backlog and two Sprint Backlogs. Each of these has a schedule associated with it. Into the Release Backlog we will move all the Stories we wish to include in our Release 1.0. Before that, however, we need to allocate dates to the Release.

To set dates to the release, follow the steps below.

| Step no. | Action | Expected Result |
|----------|--|---|
| 1 | From the Project Area Dashboard, click the link View All Timelines in the Timelines area on the right. | The Timelines screen is shown with a single item listed, called Main Development [Project Timeline]. |
| 2 | Expand the node beside Main Development [Project Timeline] | The node expands to reveal two items: Release 1.0 and Backlog. Shown next to Release 1 are its start and end dates. |
| 2 | Expand the node beside Release 1.0. | Two Sprint Backlogs will be revealed under Release 1.0. One will have a small blue arrow overlaid on its Plan icon, indicating it is the active Iteration ( Sprint 1). Remember, an Iteration corresponds to a Sprint. |
| 3 | Click Release 1.0 | The line containing Release 1.0 will be shaded orange. |
| 4 | Click the button Edit Properties on the right. | A popup appears entitled Edit the Iteration (see screenshot below). |



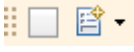


| | | |
|---|--|--|
| 5 | Edit the Start Date and End Date fields to the required values and click OK. | The popup disappears and the revised dates are shown in the plan screen next to Release 1. |
| 6 | Click Save | The new dates are saved and the Plan tree is collapsed |

5 Plan a Release

When planning a Release, the Product Owner makes an initial estimate of which Stories can fit in a Release and moves the Stories from the Backlog to the Release.

The procedure is as follows.

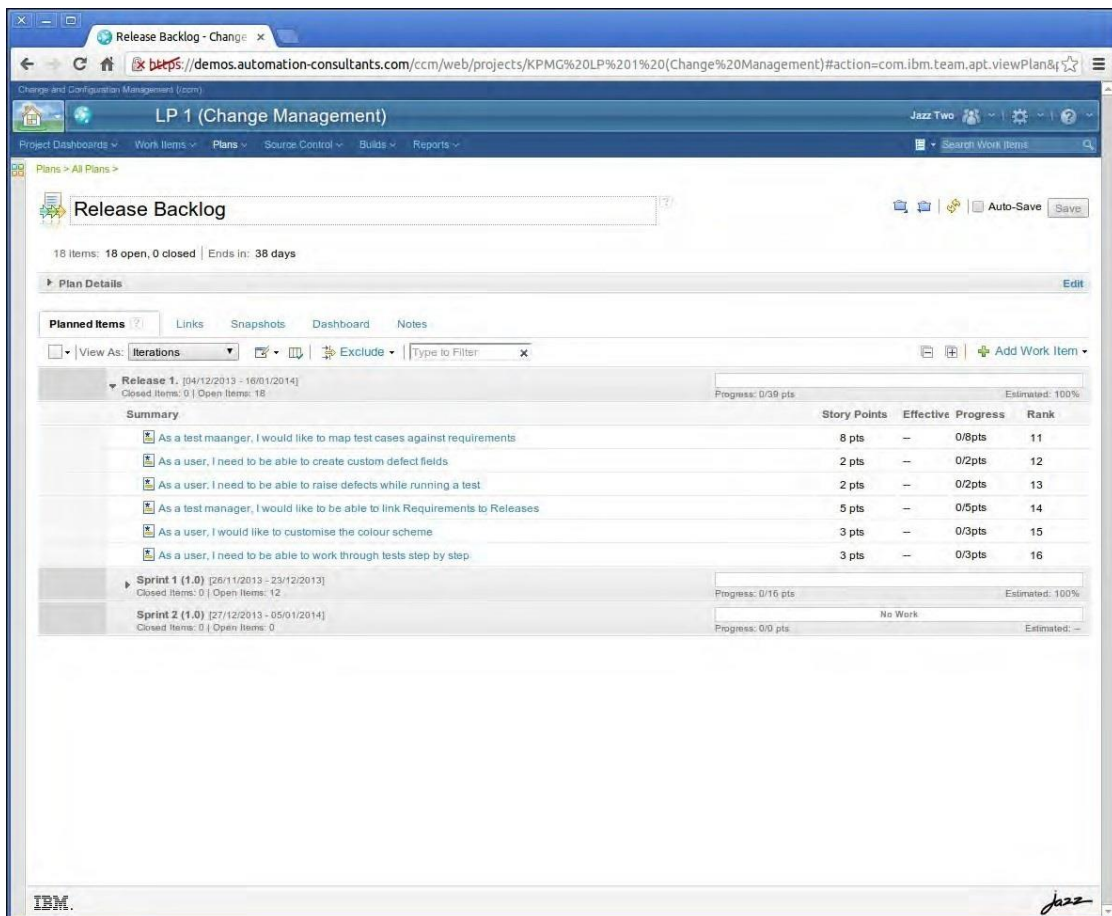
| Step no. | Action | Expected Result |
|----------|---|--------------------------------------|
| 1 | While logged in as a Product Owner, navigate to the Project Area dashboard. | The Project Area dashboard is shown. |

| Step no. | Action | Expected Result |
|----------|--|---|
| 2 | Choose the menu Plans / All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 2 | Click Product Backlog | The Product Backlog opens (see second screenshot in section 3.1 above), showing a list of Stories. |
| 3 | For each Story you wish to include in the Release, mouse over the Actions column. | A checkbox and menu button appear (). |
| 4 | Click in the checkbox to select the Story. | The story is checked and the checkbox stays visible when the mouse moves away. |
| 5 | Mouse over the menu button next to the checkbox () on one of the selected stories and click it. | A menu appears below the button. |
| 6 | Form the menu, choose the option 'Plan [X] Plan Items For', where [X] is the number of stories selected. | A submenu appears, listing all the Backlogs. |
| 7 | Choose Release 1.0 from the submenu. | The selected Stories are marked with this symbol:  . |
| 8 | Click the Save button at top right. | The marked Stories are moved to Release 1, and disappear from the list of Stories in the Product Backlog. |

If you open the Release Backlog, the Stories chosen above will be shown immediately under the Release, i.e. not in any Sprint.

To see this, follow the steps below.

| Step no. | Action | Expected Result |
|----------|-----------------------------------|---|
| 1 | Choose the menu Plans / All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 2 | Click Release Backlog | The Release Backlog is shown – see screenshot below. |




6 Plan a Sprint

6.1 Moving Stories into a Sprint

Once the Product Owner has chosen the Stories he or she wishes to include in the Release, the next step is for the Scrum Master to go through the Stories with the development team to work out which of them should be included in the first Sprint.

Once it has been decided which Stories to include in the first Sprint, the Scrum Master navigates to the Release Backlog and drags the desired Stories from the Release down to the Sprint.

The exact steps are as follows.

| Step no. | Action | Expected Result |
|----------|--|---|
| 1 | Choose the menu Plans / All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 2 | Click Release Backlog | The Release Backlog is shown – see screenshot in section 5 above. |
| 3 | For each Story to be included in the first Sprint, drag the story using the grip on the left side of the line containing the Story () down to the area immediately below the thick horizontal bar labelled Sprint 1. | The Stories disappear from the list below Release 1. |

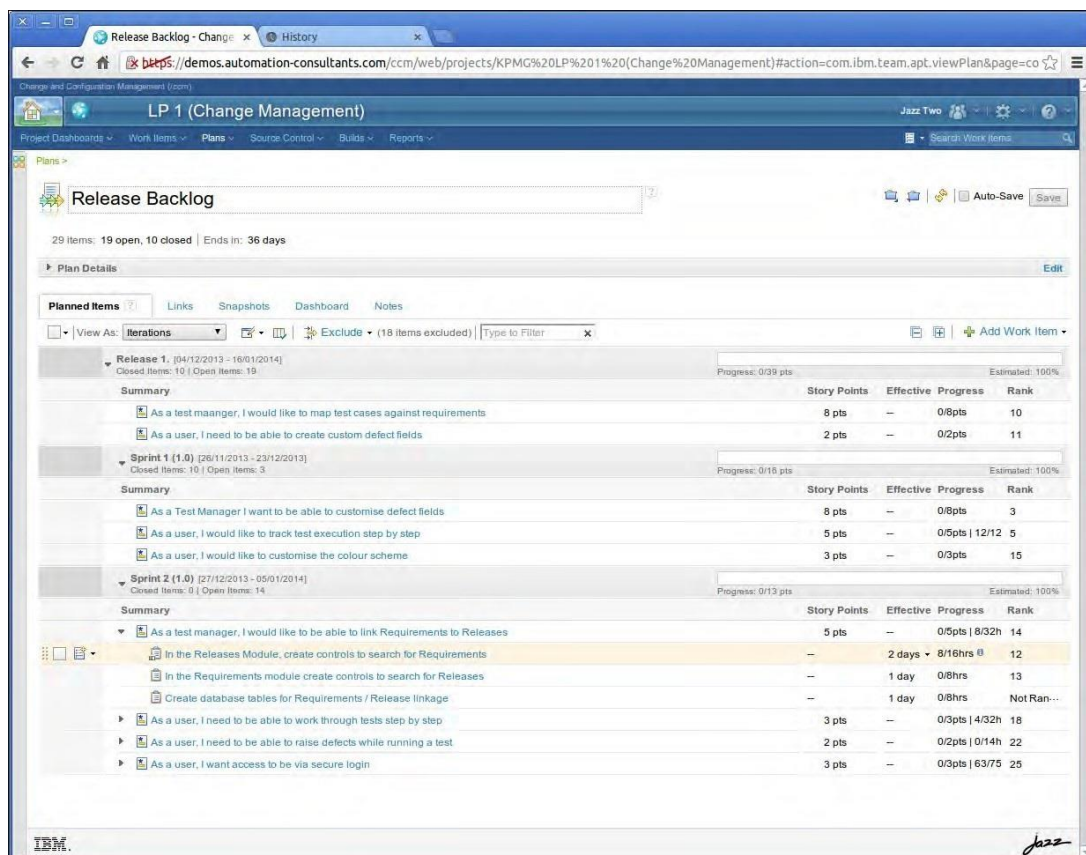
| Step no. | Action | Expected Result |
|----------|---|--|
| 4 | Click the small triangle immediately beside the Sprint 1 label. | The contents, mostly Stories, of Sprint 1 extend and a list of them appears below the Sprint 1 label. Those Stories which have been moved to the Sprint in the previous step will be shaded yellow to indicate that their move has not yet been saved. |
| 5 | Click Save. | The new location of the moved Stories will be saved and the yellow shading will disappear. |

6.2 Add Tasks to Stories

A Task is a Work Item which represents a smaller unit of work than a Story. Stories are typically broken down into a number of Tasks, with the Task being a discrete piece of work of manageable size.


The Scrum Master and developers will normally hold a meeting to decide on how the Stories should be broken down into Tasks. To reflect the decisions taken in the meeting, follow the steps below.

| Step no. | Action | Expected Result |
|----------|---|---|
| 1 | From the Project Dashboard, choose the menu Plans/All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 2 | Under the Sprint 1 (1.0) section, click Release Backlog. | The Release Backlog is shown (see screenshot below). |



The screenshot displays the IBM Jazz RTC Release Backlog interface. The browser address bar shows the URL: [https://demos.automation-consultants.com/ccm/web/projects/KPMG%20LP%20%20\(Change%20Management\)#action=com.ibm.team.appt.viewPlan&page=co](https://demos.automation-consultants.com/ccm/web/projects/KPMG%20LP%20%20(Change%20Management)#action=com.ibm.team.appt.viewPlan&page=co). The page title is "LP 1 (Change Management)". The main content area is titled "Release Backlog" and shows a list of planned items for Release 1, Sprint 1, and Sprint 2. The items are displayed in a table with columns for Story Points, Effective Progress, and Rank. The current item selected is "In the Releases Module, create controls to search for Requirements" with 2 story points and a rank of 12.

| Item | Story Points | Effective Progress | Rank |
|---|--------------|--------------------|------------|
| As a test manager, I would like to map test cases against requirements | 8 pts | 0/8pts | 10 |
| As a user, I need to be able to create custom defect fields | 2 pts | 0/2pts | 11 |
| As a Test Manager I want to be able to customise defect fields | 8 pts | 0/8pts | 3 |
| As a user, I would like to track test execution step by step | 5 pts | 0/5pts | 12/12 |
| As a user, I would like to customise the colour scheme | 3 pts | 0/3pts | 15 |
| As a test manager, I would like to be able to link Requirements to Releases | 5 pts | 0/5pts | 8/32h |
| In the Releases Module, create controls to search for Requirements | 2 pts | 2 days | 8/16hrs |
| In the Requirements module create controls to search for Releases | 1 day | 0/8hrs | 13 |
| Create database tables for Requirements / Release linkage | 1 day | 0/8hrs | Not Ran... |
| As a user, I need to be able to work through tests step by step | 3 pts | 0/3pts | 4/32h |
| As a user, I need to be able to raise defects while running a test | 2 pts | 0/2pts | 0/14h |
| As a user, I want access to be via secure login | 3 pts | 0/3pts | 63/75 |

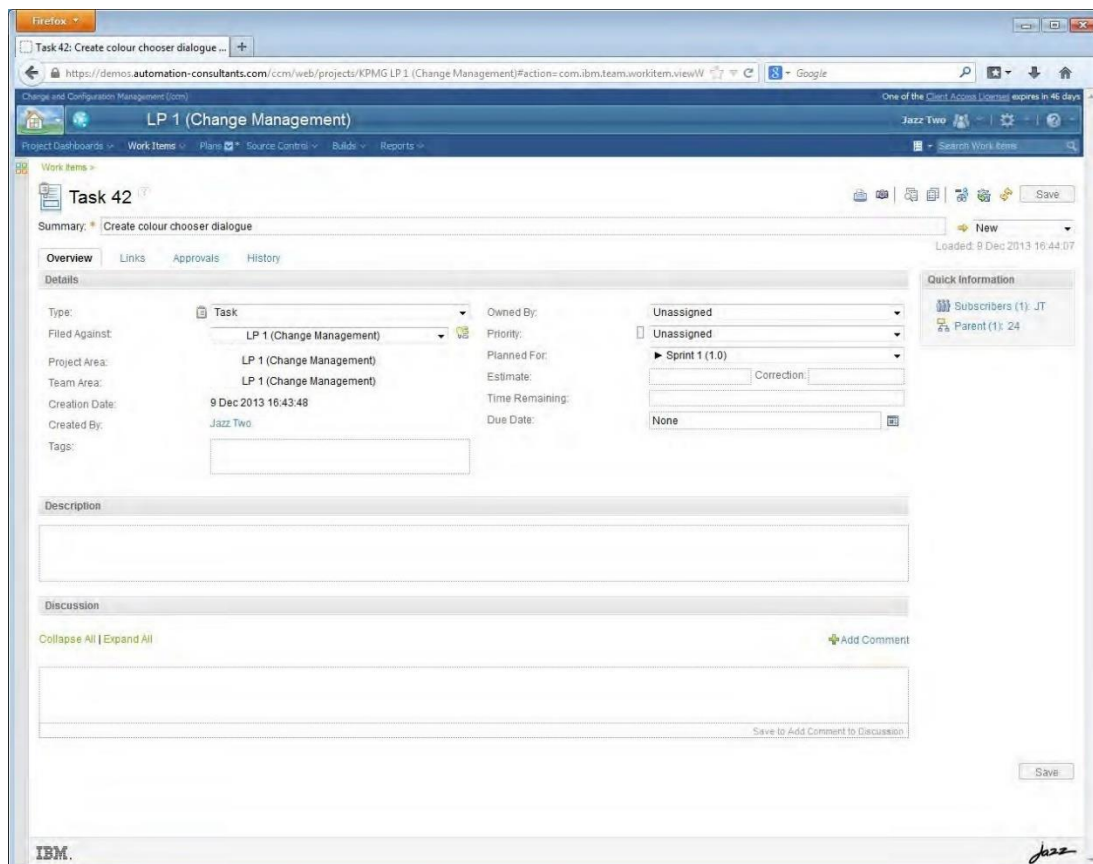
| | | |
|---|--|--|
| 3 | Ensure that the combo box beside 'View As' is set to Iterations. | The view changes to the Iterations view if not already set to that view. |
| 4 | Click on the line in the list holding the Story for which you wish to create Tasks (don't click on the name of the Story itself). | The line will be highlighted orange, and the checkbox and menu button will appear toward the left of the line. |
| 5 | Click the small black triangle on the right of menu button () | A menu extends from the menu button. |
| 6 | Choose Create Child Work Item / Task | A new line in the list appears with the Summary editable. |
| 7 | Type a summary of the Task in the field and press ENTER | The summary field stops being editable and the new title appears in the Work Item list, shaded yellow to indicate it has not been saved. |
| 8 | Click Save | The new task is saved and the yellow shading disappears. |

6.3 Estimate Task Duration

In this section we record the consensus between the scrum master and the developers as to the length of time each task will take.

To do this, follow the steps below.

| Step no. | Action | Expected Result |
|----------|--|---------------------------------------|
| 1 | Click the Task Summary in the Sprint Backlog or Release Backlog. | The task opens (see screenshot below) |





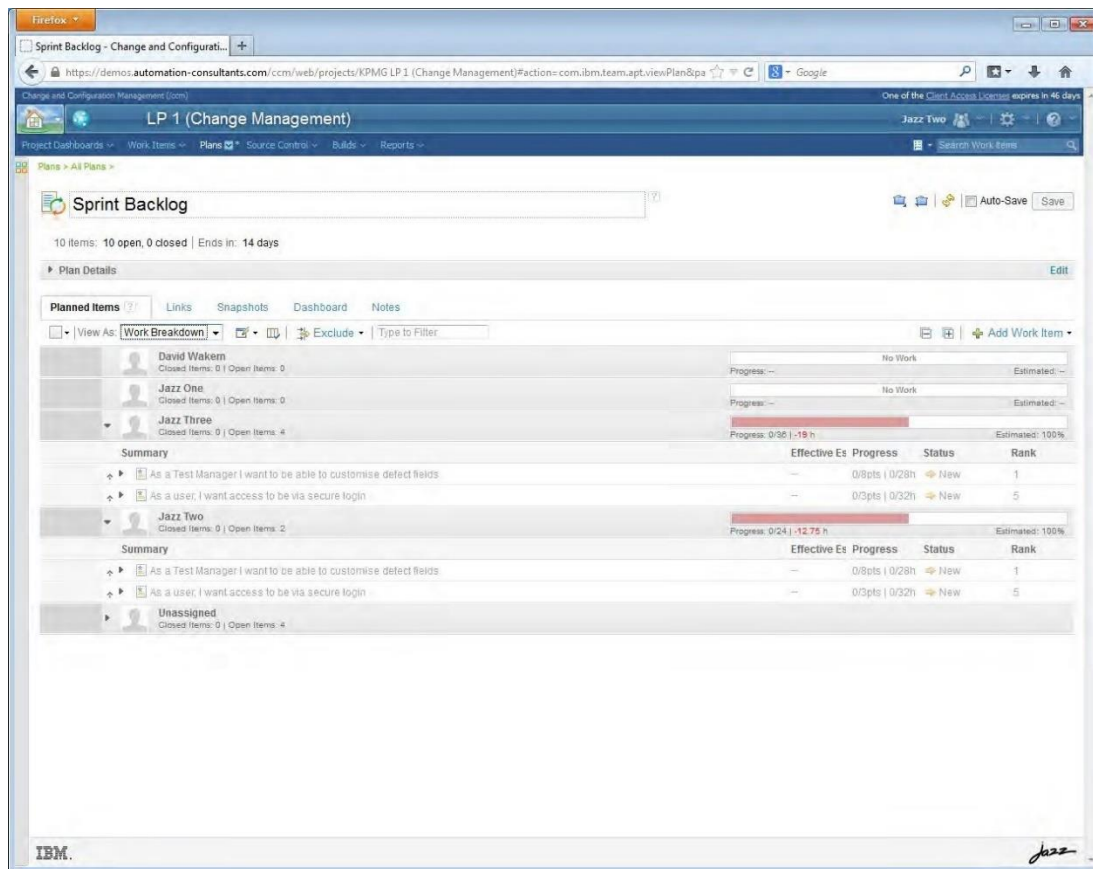
| | | |
|---|---|--|
| 2 | Enter the Task’s estimated duration in the Estimate field, together with the units (h=hours, d=days etc). | Duration and units appear in Estimate field. |
| 3 | Enter a description of the Task in the Description field. | Description field is filled in. |
| 4 | Click Save | Task details are saved. |

6.4 Assign Task to Owner

In this section we record the owner of a Task, i.e. who will be responsible for doing it, based on the meeting between the scrum master and the developers.

To do this, follow the steps below.

| Step no. | Action | Expected Result |
|----------|---|--|
| 1 | From the Project Dashboard or elsewhere in the Project Area, extend the menu Plans and under the Recent Plans section, choose Sprint Backlog. | The Sprint Backlog is shown (see screenshot in section 6.2 above). |
| 2 | Extend the combo box beside 'View As' | The menu below the combo box extends. |
| 3 | Choose Work Breakdown from the combo box menu. | The view changes to Work Breakdown View (see screenshot below). |



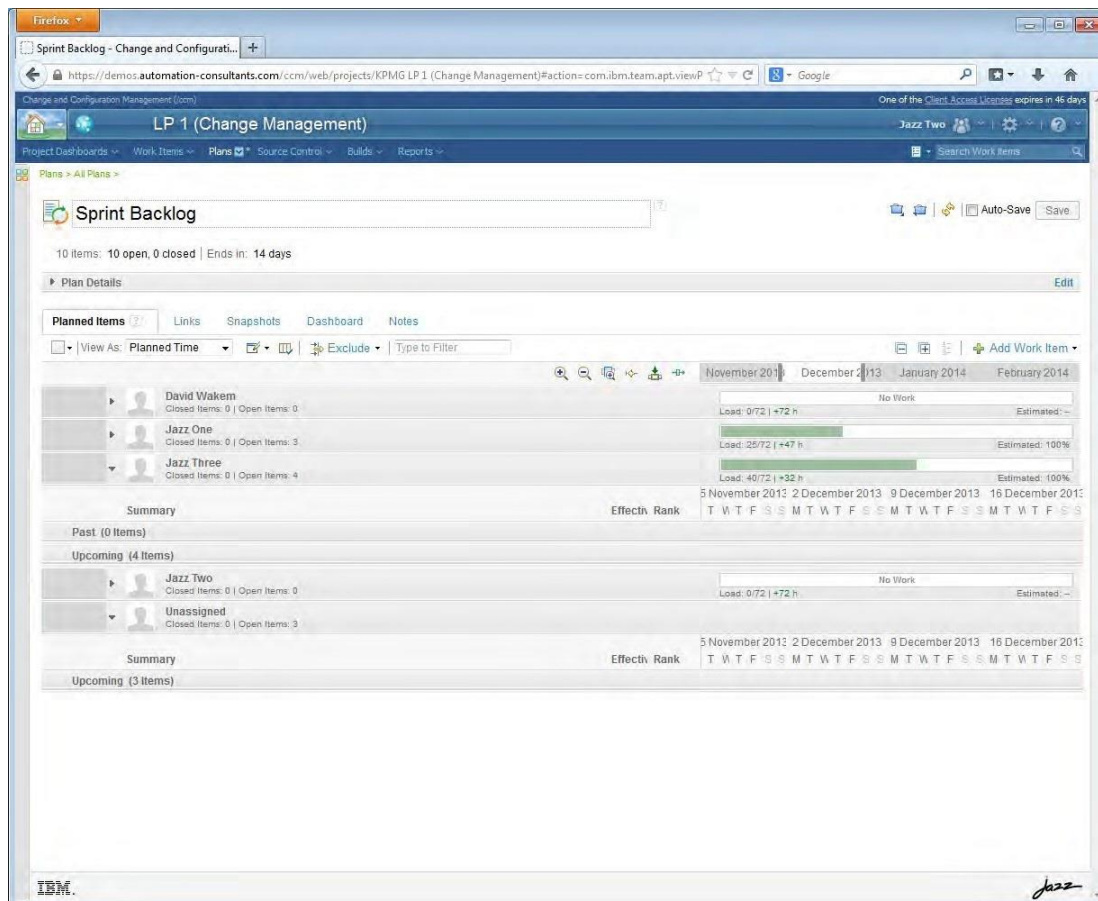
| | | |
|---|--|--|
| 5 | Expand the Unassigned section, by clicking on the small triangle next to the 'Unassigned' label. | The Stories and Tasks of the Sprint are shown. |
| 6 | Drag each Task (leave the Stories as they are) to one of the team member sections shown on the screen. | The Tasks appear beneath the team members to which they have been assigned, shaded yellow. |
| 7 | Click Save | The Story assignments are saved and the yellow shading disappears. |

6.5 Monitoring Workload

6.5.1 Switching to the Planned Time View

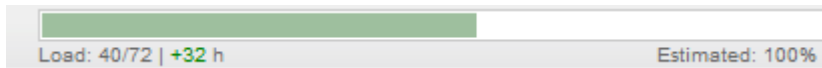
As tasks are assigned to team members, the number of Story points assigned to each rises. The Scrum Master will try to ensure that the workload is evenly balanced, taking account of the availability of each team member.

The availability and workload of each team member can also be seen in the Planned Time view. To switch to this view, select Planned Time from the 'View As' combo in the Sprint Backlog. A screenshot of this view is shown below.



6.5.2 Graphs and statistics shown in the Planned Timeview

For each team member there is a graphic similar to that shown below.

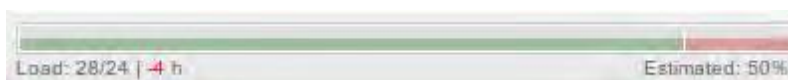


The statistics reported by the graphic toggle between three sets. Clicking on the graphic toggles to the next set of statistics. The statistics are summarised in the following table.

| Set | Display | Interpretation |
|----------------------|---------------------|--|
| 1 (shown by default) | Load xx/yy zz | <ul style="list-style-type: none"> xx is the number of hours' work allocated to the resource yy is the number of hours in which the resource is available zz is the number of hours' spare capacity, available for further allocation. If negative it is shown in red and means the resource is overloaded. |
| 2 | Progress xx/yy zz | <ul style="list-style-type: none"> xx is the estimated duration of the work completed, i.e. the hours it was estimated that the work now complete was to have taken (different from actual hours spent) yy the total estimate in hours of duration of work allocated to the resource. |
| 3 | Progress xx/yy pts | <ul style="list-style-type: none"> xx is the total point score of the work completed by the resource yy is the total point score of the work allocated to the resource |

Note: The number of hours available to a resource is calculated from the actual start date of the Sprint, not the planned start date.

The 'Estimated' percentage on the right of the graphic refers to the percentage of the tasks allocated to the resource made up by those having an estimated duration. If this percentage is less than 100, the thickness of the graphic is less than full. The image below shows a graphic with the 'Estimated' value at 50%. This means that only half the tasks assigned to the resource have had an estimate entered for their duration. The bar is only half its potential thickness.



The proportion of the Tasks with an estimated duration also affects the "Quality of planning" rating. Hovering the mouse over the graphic causes a balloon to appear showing the graphic's statistics in more detail. The contents of the balloon vary to match whichever set of toggled statistics is currently shown. The Quality of Planning rating ranges from Poor to Excellent.

By default, available time is set to 8 hours per day, and resources are available every working day. This can be adjusted by the following factors.

- The default number of hours worked per day is often adjusted downwards to reflect the fact that every worker must spend a part of their day on admin tasks.
- The number of hours available per day can be adjusted by commitments to other projects.
- The total number of hours available can be affected by scheduled absences.

Each team member sets their own availability and absences in the personal screens accessed by the menu [Username] / View My Profile and licences.

7 View and Report Progress on the Taskboard

Once the Sprint begins, the team members will start work on their tasks and regularly report progress in the form of

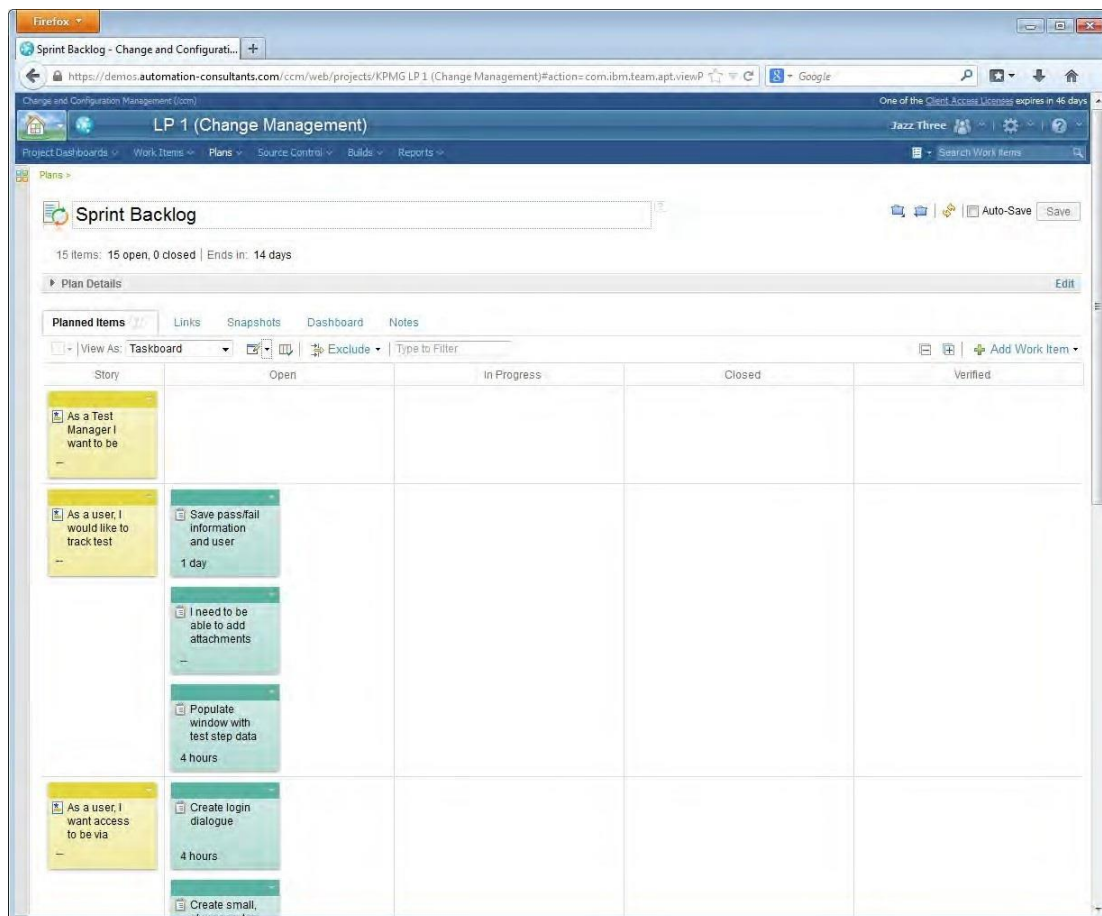
- how much time remains on each task
- completion of tasks
- estimated time remaining on unfinished tasks.

Progress is tracked via an on screen representation of the classic agile taskboard with post-it notes representing the tasks. The Taskboard is a view in the Sprint Backlog.


7.1 Accessing the Taskboard and Configuring the View

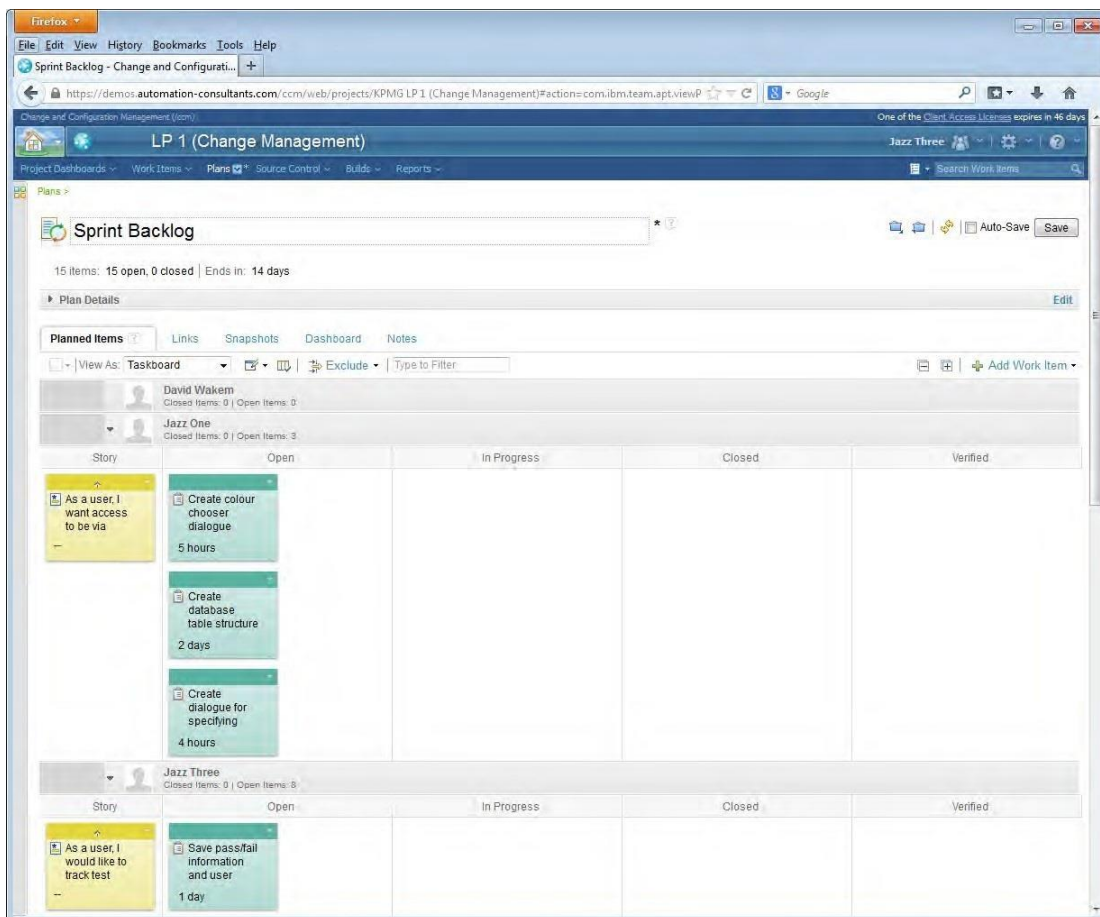
To access it, follow the steps below.

| Step no. | Action | Expected Result |
|----------|---|---|
| 1 | Log in as a Team Member. | Your dashboard is displayed, similar to a home page on the Jazz platform. |
| 2 | Navigate to the Project Area dashboard. Choose the menu Plans / All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 3 | Click on the Sprint Backlog | The Sprint Backlog is shown (see screenshot in section 6.2 above). |
| 4 | Choose Taskboard from the combo box beside 'View As'. | The view changes to Taskboard View (see screenshot below). |



A developer will want to see the Tasks grouped by owner. To view the tasks in this way, follow the steps below.

| Step no. | Action | Expected Result |
|----------|--|--|
| 1 | Click the Edit Plan View () icon, and in the menu that appears, choose Edit Taskboard | A popup window appears filled with options for adjusting the display. |
| 2 | Click the down arrow towards the right of the More button at the bottom of the window, and in the menu that appears, choose Group. | Another line appears in the window of display options, which contains two combo boxes. The left hand combo box contains the entry 'Group'. |
| 3 | Ensure that the Right hand combo box, of the two that appeared in the previous step, is set to Owner. | Combo boxes in the bottom line of the popup window read Group and Owner. |
| 4 | Click OK in the popup window | The popup window disappears and the taskboard is now grouped by Task owner (see screenshot below). |



The Taskboard shows the completion status of each Task and also shows the relationship between Tasks and their parent Stories.

Further useful customisations are

- Colour coding the tasks which possess certain tags
- The Kanban view.

More information on these customisations is available in the help [here](#).



7.2 Reporting Progress with the Taskboard

Reporting the progress of work on tasks is done in the classic way by dragging the task from one column to another on the taskboard.

When a developer starts work on a Task, he or she will drag the Task from the Open column to the In Progress column.

To **report the number of hours' work left** on the Task, the developer can simply click on the down arrow next to the time period shown in the bottom of the Task "post-it". A menu appears allowing the time left to be updated.

Alternatively, the developer can click on the Task title. This opens the Task window and the figure can be entered in the Time Remaining field.

Comments can be entered in the discussion field logging any issues encountered or tips and tricks applied in coding the Task. They can prove to be a valuable record of the Sprint for learning lessons for the future.

8 Using the Query Tool to Track Progress

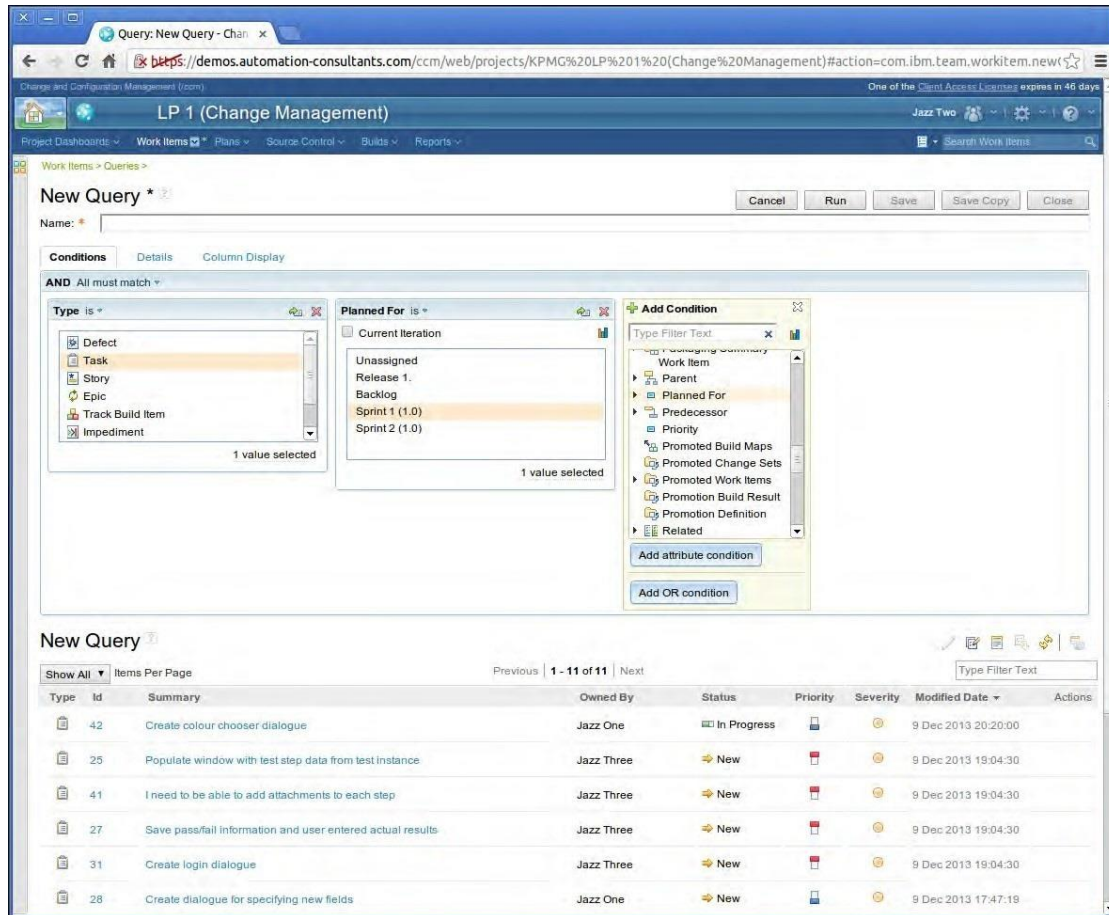
RTC provides an intuitive query tool which lets you track any data that is of interest, and is useful for tracking progress from a management perspective. For example it can be used to list all the Stories in the Product Backlog, or all the Tasks in a Sprint.

An example will be provided here of listing all the Tasks in a Sprint. After following this example, the further use of the query tool should be fairly intuitive.

To list all the Tasks in a Sprint, follow the steps below.

| Step no. | Action | Expected Result |
|----------|--|---|
| 1 | Log in as a Scrum Master and, from the Project Area dashboard, choose the menu item Work Items / Create Query | The New Query screen is shown. |
| 2 | Click the Add Condition button. | The Add Condition window appears. |
| 3 | From the listbox in the window, click Type. It is possible either to scroll down or to enter the first letters of 'Type' in the Filter Text Field. | Type is selected. |
| 4 | Click Add attribute condition | A popup window appears to the left of the Add Condition window entitled "Type is" |
| 5 | In the newly appeared window, select Task | Task is selected in the left hand window. |
| 6 | In the Add Condition Window, if the Filter Text field contains text, clear it and click the green cross at the top left of the window to repopulate the listbox. Then in the listbox Select 'Planned For'. | Planned For is selected. |
| 7 | Click Add Attribute condition | A new popup window appears to the left of the Add Condition window entitled 'Planned For is'. |
| 8 | In the newly appeared popup, select Sprint 1 (or the desired Backlog). | Sprint 1 is selected. |

| Step no. | Action | Expected Result |
|----------|-----------|--|
| 9 | Click Run | The query output is displayed in the bottom half of the screen (see screenshot below). |



| Step no. | Action | Expected Result |
|----------|--|---|
| 10 | To save the query, Type a name in the Name field and click Save. | The query will be saved and the run results will disappear. |

Saved queries can be accessed in future by choosing the Work Items / My Queries menu from the Project Area dashboard or any screen in the Project Area.

9 Schedule a Sprint Review

At the end of a Sprint, it is common practice to review the Sprint in the following ways.

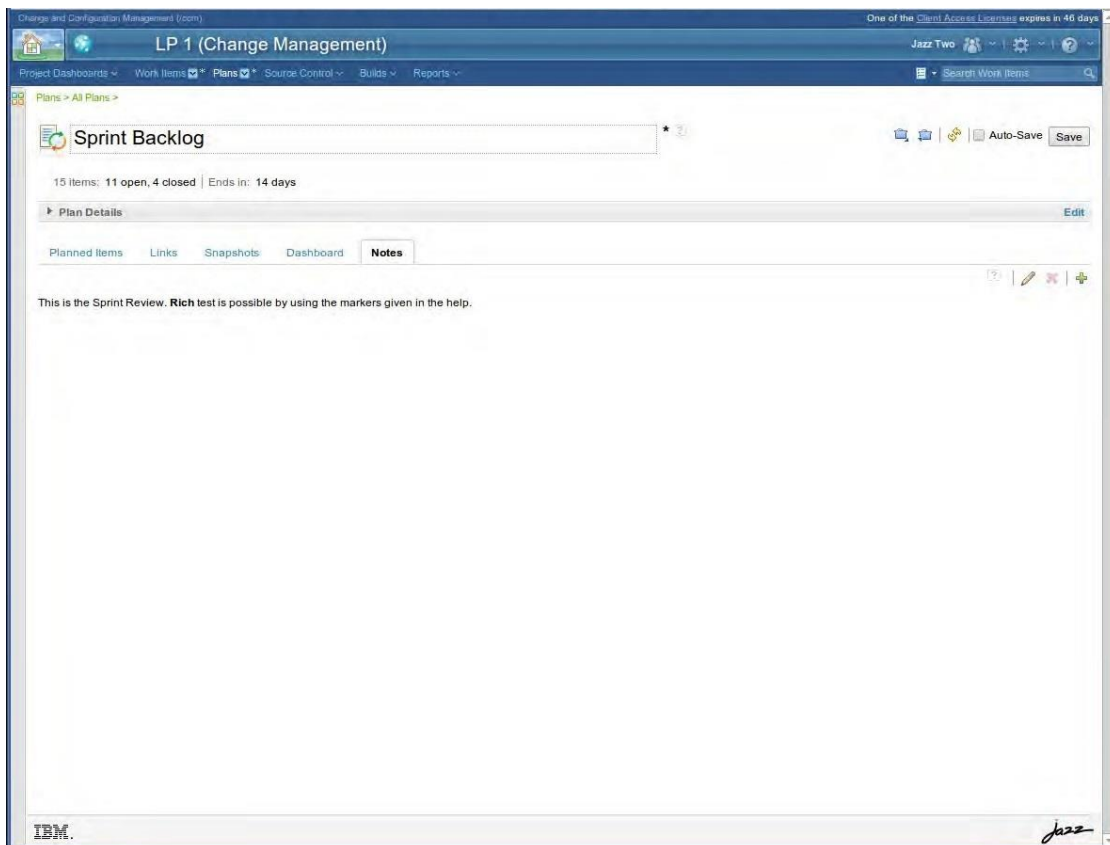
1. A **Sprint review meeting** takes place between the Scrum Master and the Product Owner and any other relevant stakeholders to demonstrate the new functionality created in the Sprint, and receive feedback from the Product owner.
2. A meeting or discussion known as a **“retrospective”** or “reflection” takes place between the Scrum Master and the Team Members. During the reflection, the Scrum Master proposes some discussion points and seeks to elicit the good and bad points about the Sprint, and what can be done to make improvements.

The Sprint review and the retrospective can both be captured in RTC.



9.1 Capturing a Sprint Review

The Sprint Review is stored in the Notes section of the Sprint Plan.


| Step no. | Action | Expected Result |
|----------|---|--|
| 1 | Log in as a Scrum Master and navigate to the Project Area dashboard. From the menu choose Plans / All Plans | The Plan list is shown (see first screenshot in section 3.1 above). |
| 2 | Click the desired Sprint Backlog | The Sprint Backlog opens |
| 3 | Click the Notes tab. | The notes tab opens, showing a text area in which the discussions, feedback and decisions from the Sprint Review meeting can be recorded. A screenshot is shown below. |
| 4 | Enter the desired notes, using rich text if desired. | |
| 5 | Click Save. | The notes are saved. |



The notes tab contains the following features.

- The pencil icon () switches editing on and off.
- Rich text can be entered using special character combinations, e.g. ****bold****, much like in many wiki editors.
- A list of the character combinations can be found by hovering the mouse over the help icon ().



- Additional pages of notes can be added with the plus () icon.

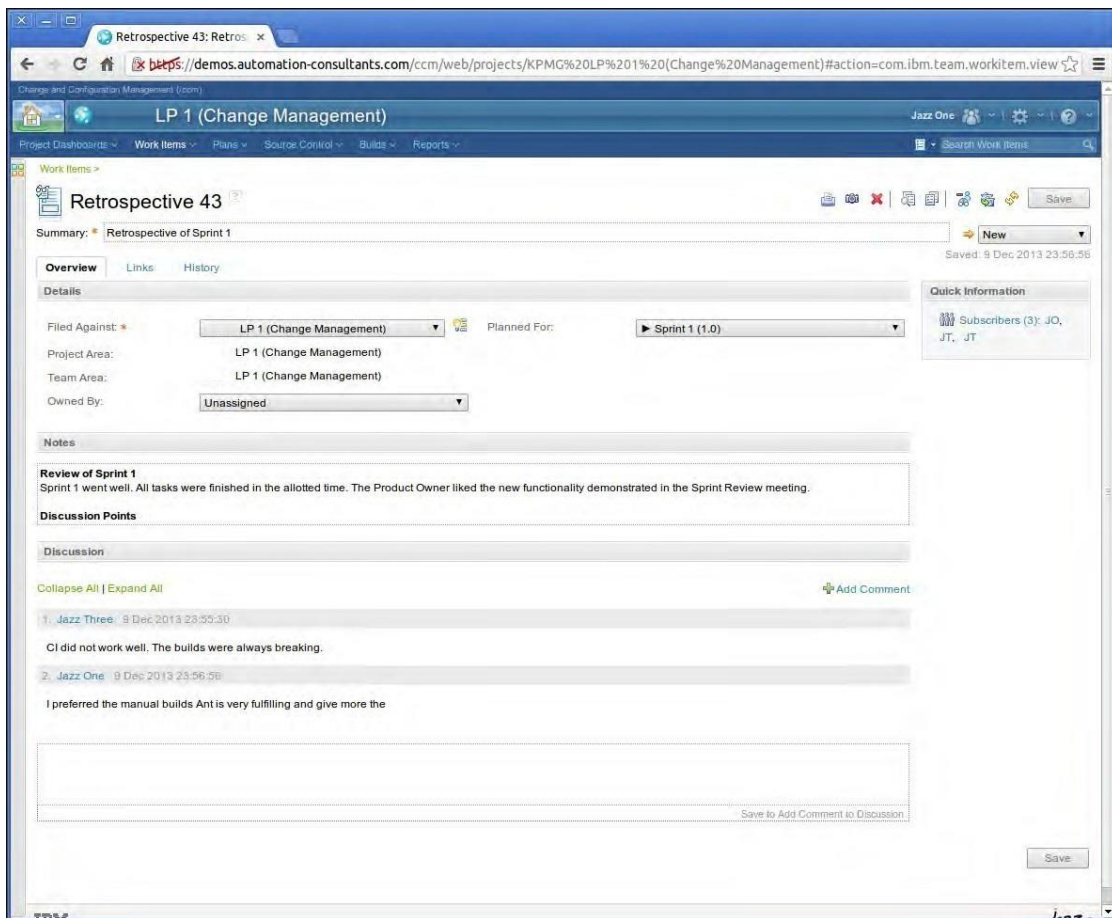
9.2 Capturing a Retrospective

A retrospective is more of an interactive discussion than a Sprint review meeting. It is captured in a dedicated Work Item called a Retrospective.

To create a Retrospective for a Sprint, follow the steps below.

| Step no. | Action | Expected Result |
|----------|---|--|
| 1 | Log in as a Scrum Master and navigate to the Project Area dashboard. From the menu choose Work Item / Create New / Retrospective | The Retrospective screen is shown for a new Retrospective. |
| 2 | Type a Summary in the summary field, e.g. "Retrospective of Sprint 1" | |
| 3 | In the Filed Against field, choose the name of the current Project area. | |
| 4 | In the Planned For field, choose the name of the Sprint. | |
| 5 | In the Notes field, type the Scrum Master's discussion points for the retrospective, (e.g. what went right and wrong?) and any other comments deemed appropriate. | |
| 6 | Click Save | The Retrospective is saved. |

After the retrospective has been created, Team Members can add comments. A screenshot of a completed Retrospective is shown below.



10 Shutting down a Sprint

Once the Sprint has ended – usually on a fixed date irrespective of whether all its Tasks have been completed – and its review and retrospective have been completed, it is time to prepare the next Sprint and to shut the recently completed Sprint down.

10.1 Preparing the next Sprint

Preparing the next Sprint consists of agreeing which Stories to put in it, breaking the Stories down into Tasks and moving any unfinished Stories from the previous Sprint to the new one.

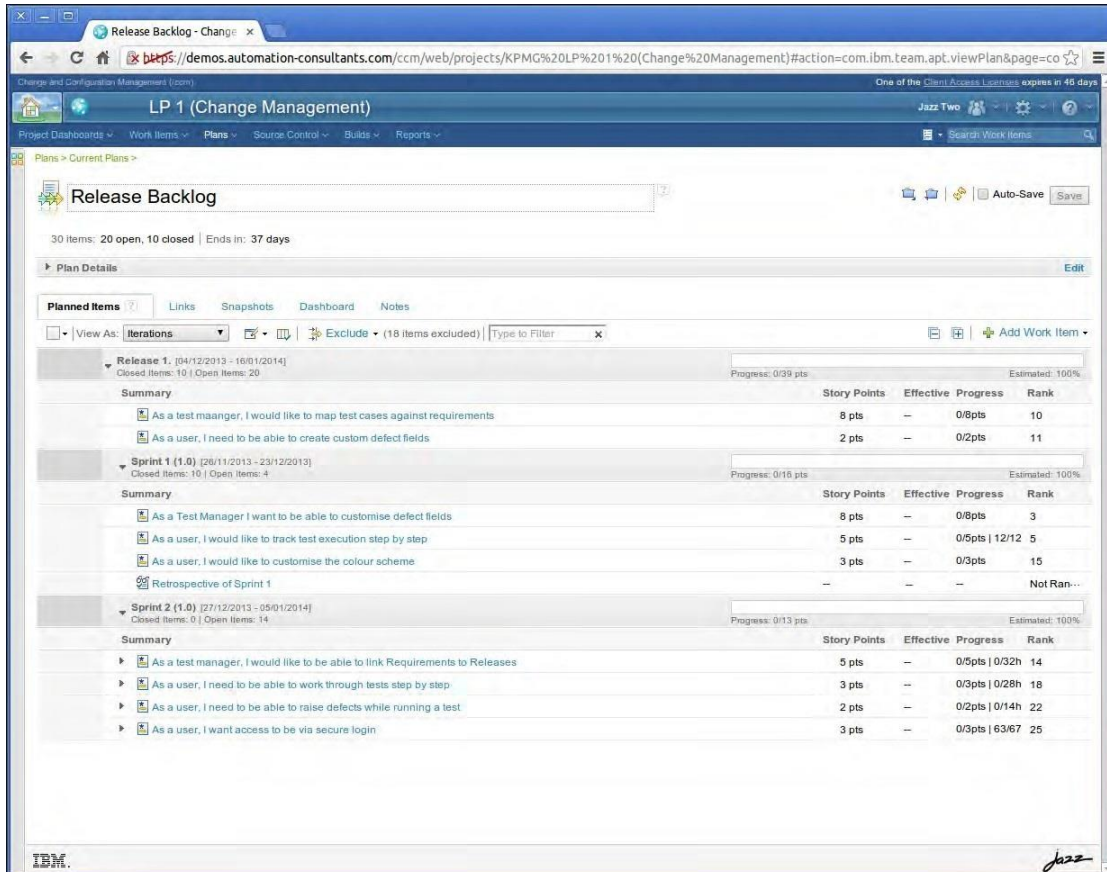
The procedure is as follows.

| Step no. | Action | Expected Result |
|----------|---|---|
| 1 | Log in as a Scrum Master and navigate to the Project Area dashboard. | The Project Area dashboard is shown. |
| 2 | Add Stories to the new Sprint from the Product Backlog, as in 6.1 above | The New Sprint is populated with Stories |
| 3 | Break the Stories down into Tasks as in 6.2 above. | The Stories of the Sprint have child Tasks. |

To add unfinished Stories from the previous Sprint, continue as follows.



| Step no. | Action | Expected Result |
|----------|---|--|
| 4 | Click the Plans menu, then Current Plans. | A plan screen is shown |
| 5 | Click the Release Backlog. | The Release Backlog is shown. |
| 6 | Ensure that the View As field is set to Iterations. | Iterations are shown as in screenshot below. |




Any Task which has been finished will no longer be shown on this display. Any visible Tasks in the previous Sprint must therefore be unfinished.

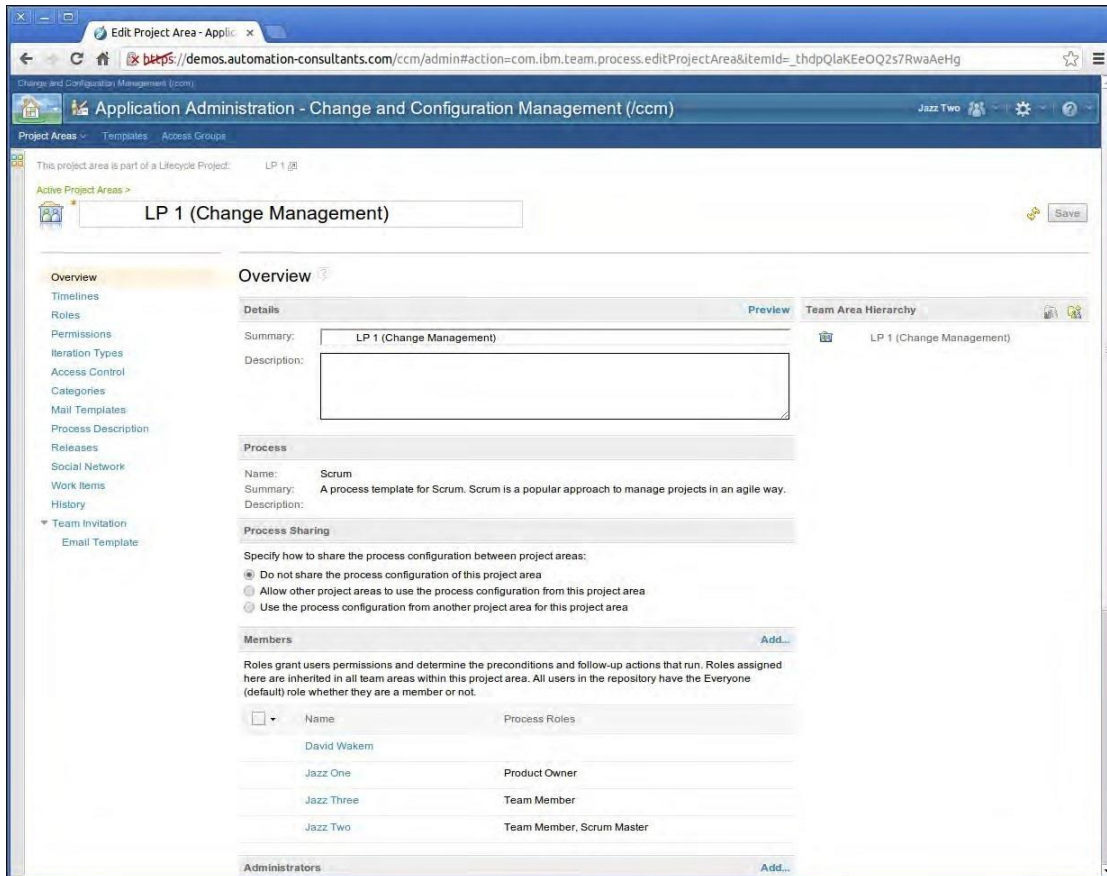
| Step no. | Action | Expected Result |
|----------|--|---|
| 7 | For each unfinished Task, drag it from the previous Sprint to the new Sprint. | All unfinished Tasks from the old Sprint are now present in the new Sprint. |
| 8 | For each parent Story of any Task which has been moved, drag it from the Previous Sprint to the new Sprint, just above its children. | All unfinished Stories from the old Sprint are now present in the new Sprint beside their unfinished Tasks. |
| 9 | Click Save | The Task and Story moves are saved. |


The old Sprint is now ready to be shut down.

10.2 Shutting down a Sprint

To shut down a Sprint, follow the steps below. It is important to have previously done the tasks described in the section 10.1 above.

| Step no. | Action | Expected Result |
|----------|--|--|
| 1 | Log in as a Scrum Master and navigate to the Project Area dashboard. | The Project Area dashboard is shown. |
| 2 | Click the down arrow beside the Administration icon (). | A menu appears. |
| 3 | Choose Manage This Project Area. | The Administration page for the project is shown (see screenshot below). |



| Step no. | Action | Expected Result |
|----------|---|--|
| 4 | In the sidebar on the left, click Timelines | The Timelines screen appears, showing a single item listed called Main Development [Project Timeline]. |
| 5 | Expand the Main Development node and below it, the Release 1 node. | The nodes expand to reveal the Sprints. |
| 6 | Click the new Sprint (e.g. Sprint 2) | The new Sprint is selected. |
| 7 | Click the button in the toolbar called 'Set the Selected Iteration as Current' (). | The new Sprint is set as the current Iteration. |
| 8 | Click Save. | The changes are saved. |