



## Agility@Scale: Agile Planning and Best Practices with IBM(R) Rational Team Concert(TM)

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**Rational.** software

# Agenda



IBM Rational Software Conference 2009  
As Real as It Gets!

- **Agile Planning Introduction**
- A Scrum Planning Episode
- How we use Agile Planning for Developing RTC

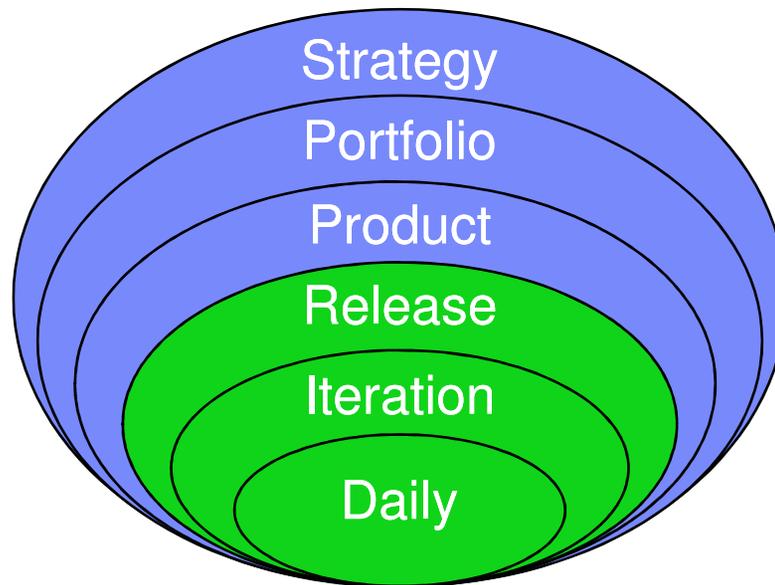
## Agile Methods

There are several Agile Methods available, however from a bird's eye view they share a common set of tooling relevant properties:

- Short development cycles (1 – 6 weeks)
- Self organizing development teams
  - ▶ Joint planning meetings
  - ▶ Stand-up meetings
- High personal responsibility of team members
  - ▶ Developers “manage” their work
  - ▶ Developers / Teams estimate
- Progress tracking
- Ongoing customer involvement
- Retrospectives
- Use of historical data to improve planning



# The Planning Onion\*



Agile team plans at the innermost three levels

RTC offers support for all these levels

(\*) Mike Cohn, Agile Estimating and Planning

# Agenda

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- **A Scrum Planning Episode**
- How we use Agile Planning for Developing RTC

## Team Concert's Agile Planning Support

- Team Concert's Agile Planning support has the following key characteristics:
- Process neutral (works with Scrum, OpenUp ...), but assumes
  - ▶ short (1 – 6 weeks) development cycles
  - ▶ supports two level planning: release, iteration
  - ▶ supports monitoring releases, iterations
- No separation between planning/implementing of features and bug fixing
  - ▶ Both planning and defect management share a common data model
  - ▶ They are supported in the same tool and are highly integrated
  - ▶ Plans are in fact a query for work items
- Supports:
  - ▶ Top down planning (product owner, team lead, ...) **AND**
  - ▶ Bottom Up (team members) **AND**
  - ▶ Plan consolidation (Sprint planning meetings, stand-ups, ...)

# Project Areas, Timelines, Iterations and Categories

**Project Setup**

defines Timelines

defines Categories

**Work Item**

Visibility	Associated Team Area
<input checked="" type="checkbox"/> JUnit Project	None
<input checked="" type="checkbox"/> backlog	None [inherited]
<input checked="" type="checkbox"/> IDE Integration	IDE Integration
<input checked="" type="checkbox"/> Eclipse	IDE Integration [inherited]
<input checked="" type="checkbox"/> IDEA	IDE Integration [inherited]
<input checked="" type="checkbox"/> JUnit	JUnit Team
<input checked="" type="checkbox"/> Doc	JUnit Team [inherited]
<input checked="" type="checkbox"/> Framework	JUnit Team [inherited]
<input checked="" type="checkbox"/> Tests	JUnit Team [inherited]

## Plan Definitions

- Plans are owned by a team or project and are associate with an iteration
- Plan contents is derived from this:
  - ▶ All work items which have a Filed Against value set to a category owned by the plan's team or project and are planned for the plan's iteration.
- They have a plan type, defining the “onion” type of a plan

**Configure Plan**  
Configure existing plan

Name: JUnit Sprint Backlog

Plan Type: Sprint Backlog

Team Members:  Project Area  Team Area

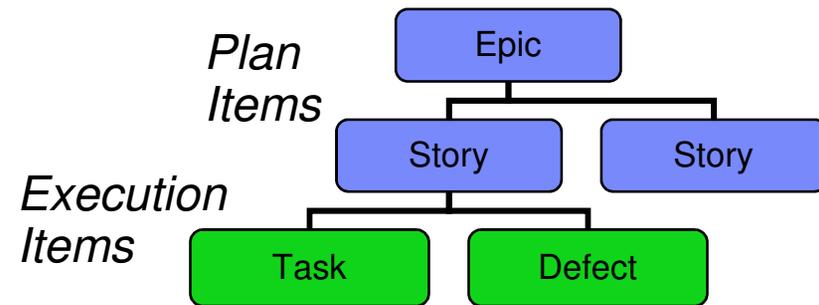
Project Area: JUnit Project

Team Area: JUnit Team

Iteration: 4.4 s2

## Plan and Execution items

- Work items have two flavors:
  - ▶ Execution Items: work items which have work assigned. In Scrum these are task, defects, ...
  - ▶ Plan Items: work items that are relevant for the planning. In Scrum these are Epics and Stories
  
- RTC allows to customize which work item types are plan items and which types are execution items.



**Configuration**

- Roles
- Project Configuration
  - Project Area Initialization
  - Permissions
  - Operation Behavior (unconfigured)
  - Event Handling (unconfigured)
- Configuration Data
  - Dashboards
  - Planning
    - Plan Attributes
    - Plan Items (unconfigured)
    - Plan Mode Elements (unconfigured)
    - Plan Modes (unconfigured)
    - Plan Scripts (unconfigured)
    - Plan Types
      - Top-Level Work Item Type**
      - Work Environment
      - Work Item Progress Mode
    - Work Items
    - Work Items (advanced)
  - Team Configuration

**Top-Level Work Item Types**

This configuration option allows you to spe

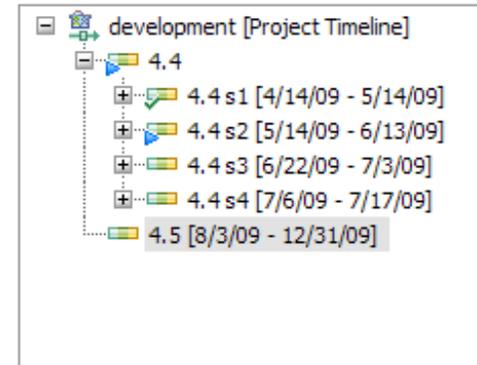
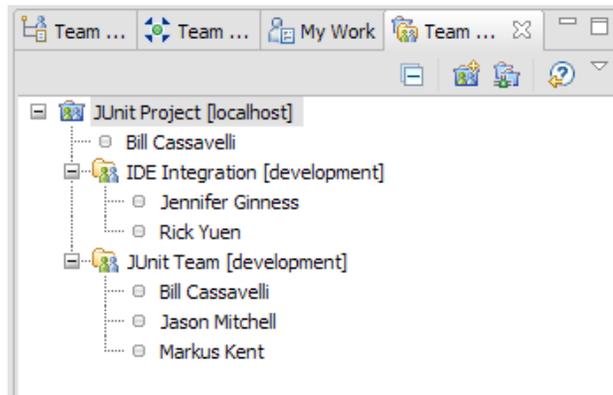
Top-Level Plan Item Types:

- Adoption Item
- Defect
- Epic
- Impediment
- Retrospective
- Story
- Task
- Track Build Item

## Plan Types

- RTC support Daily, Iteration and Release planning
- Release Planning:
  - ▶ contains planning work items for
    - The plan's iteration and all its child iterations
    - The plan's team area or project area and all its child team areas
  - ▶ Support for teams of teams
- Iteration Planning:
  - ▶ contains execution and planning work items for
    - The plan's iteration
    - The plan's team or project area
- Daily planning
  - ▶ My Work View

## Plan Types - continued



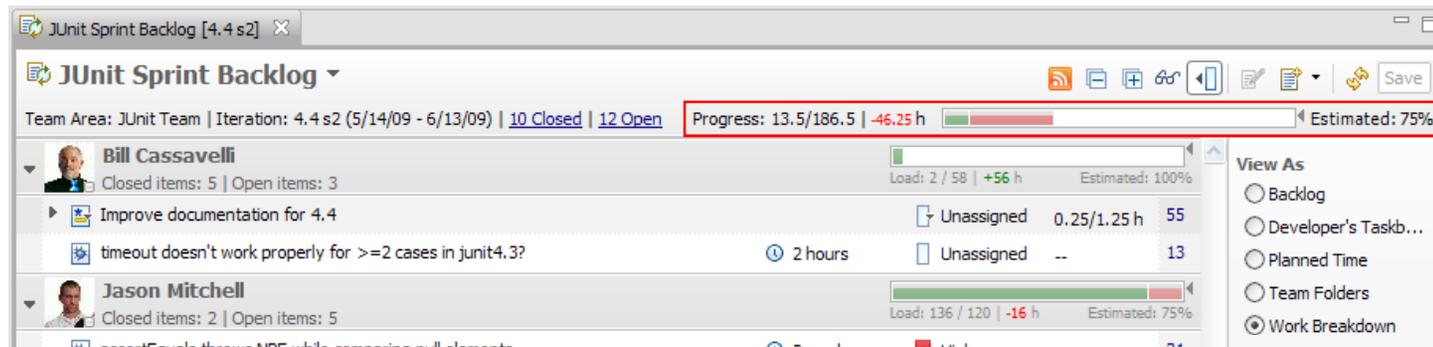
- Release plans
  - ▶ **JUnit Project / 4.4 (for projects)**: shows all plan items associated with the JUnit Project, IDE Integration team or JUnit team and planned for 4.4, 4.4s1, 4.4s2, 4.4s3 or 4.4s4
  - ▶ **IDE Integration team / 4.4 (for teams)**: shows all plan items associated with the IDE Integration team and planned for 4.4, 4.4s1, 4.4s2, 4.4s3 or 4.4s4. In addition it shows all execution items associated with the IDE integration team and planned for 4.4
- Iteration plan for JUnit Team / 4.4s2
  - ▶ Shows all work items associated with the JUnit team and planned for 4.4s2

## Background: Estimation and Sizing

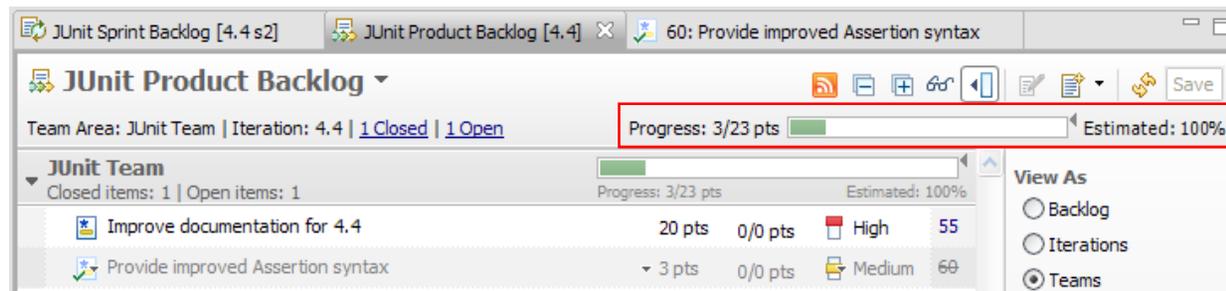
- Agile planning separates **estimating the size** from **estimating the duration**
- The **size** is often estimated in relative values. Scrum uses **Story Points**
- The **effort** is typically estimated in **Ideal Hours/Days**
- **Velocity** measures a teams rate of progress
  - ▶ Completing 2 Stories of 5 story points in one iteration gives a velocity of 10
  - ▶ Good guess is to assume the same velocity for the next iteration
  - ▶ team velocity is what matters

## Estimation and Sizing in RTC

- Effort: Execution items are estimated in ideal hours.

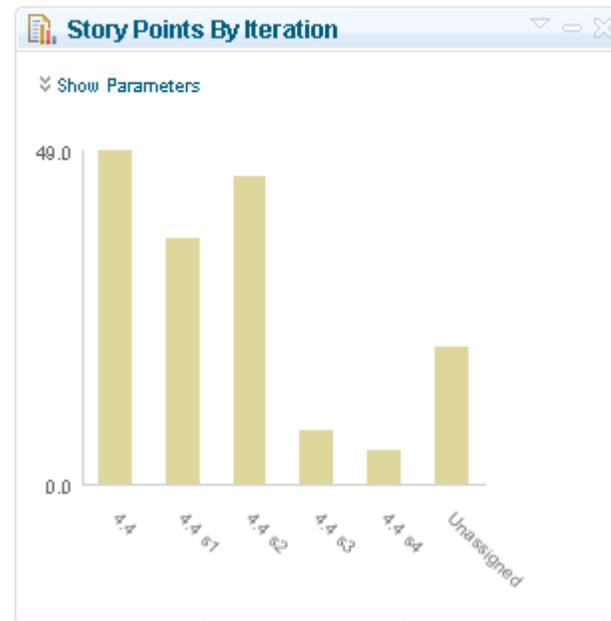


- Size: Plan items are estimated using a configurable numerical sizing attribute
  - ▶ Scrum uses Story points. Other sizing attributes could be: lines of code, function points, ...

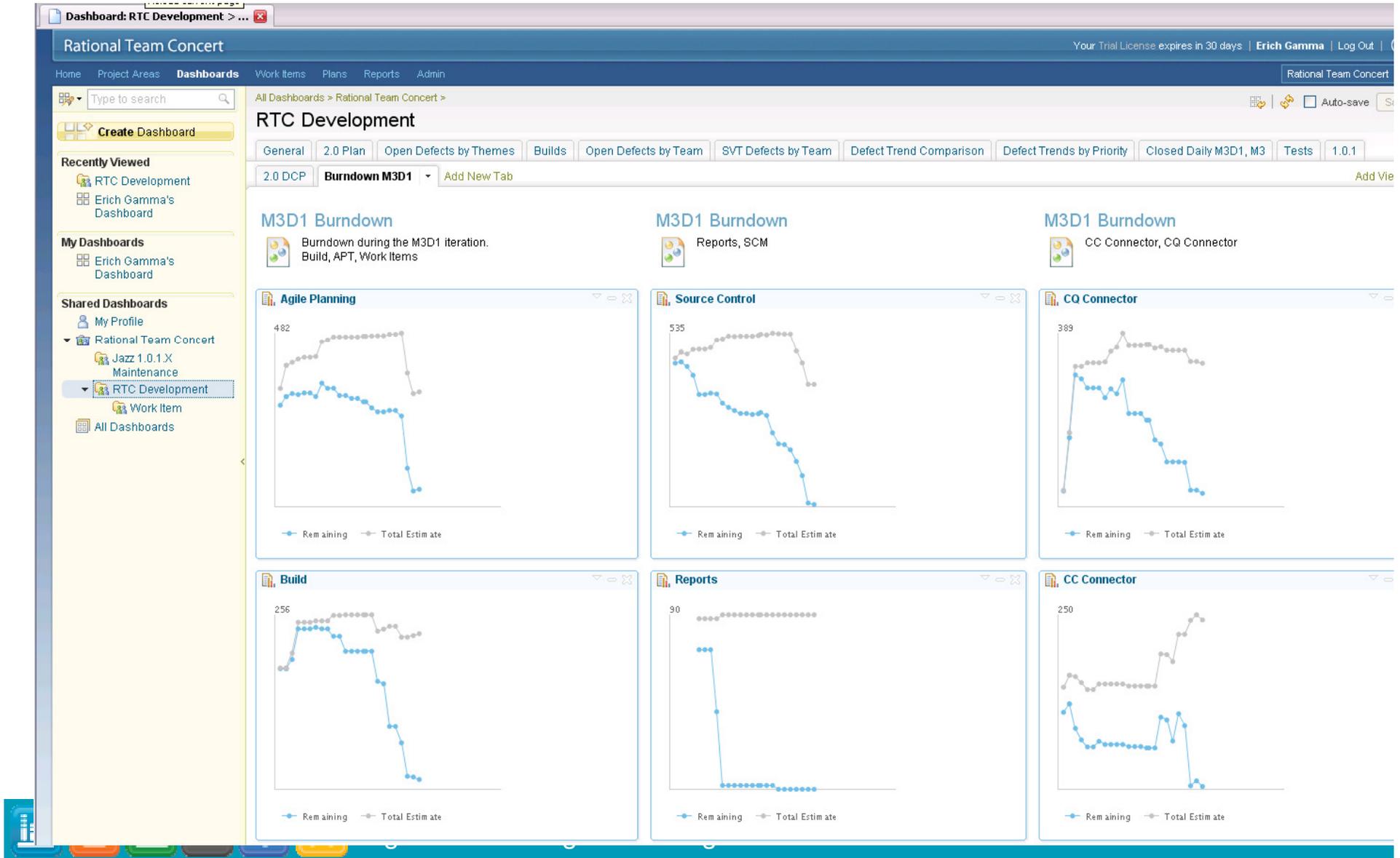


# Velocity

- RTC provides a velocity report



# Effort Burn Down

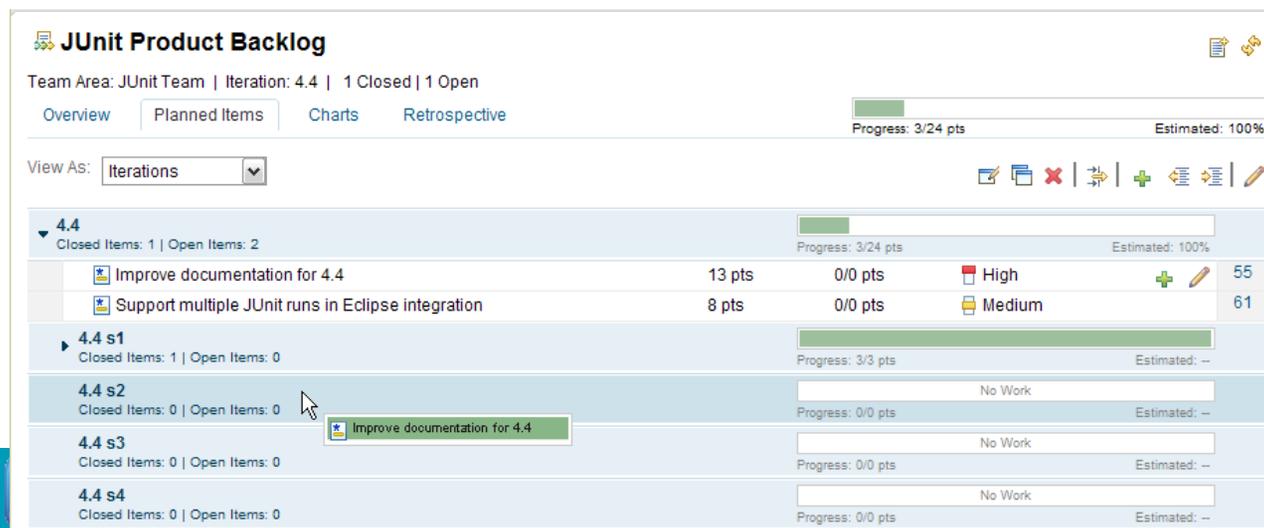


## Background: Release Planning

- Create a high-level plan that covers more than one iteration
  - ▶ a prioritized backlog of estimated plan items
  - ▶ created by the product owner
  - ▶ has a release date
- Define the iterations/iteration length
- Updated with regular frequency

## Release Planning in RTC

- Configure the project areas time line
- Create a plan of type release plan / product backlog
- Take velocity reports or other historical data to find out how many story points a team can handle per iteration.
- Assign the plan items to the iterations, based on the backlog order and the team's velocity.



**JUnit Product Backlog**

Team Area: JUnit Team | Iteration: 4.4 | 1 Closed | 1 Open

Overview | **Planned Items** | Charts | Retrospective

Progress: 3/24 pts | Estimated: 100%

View As: Iterations

Iteration	Closed Items	Open Items	Progress	Estimated
4.4	1	2	3/24 pts	100%
4.4 s1	1	0	3/3 pts	-
4.4 s2	0	0	No Work	-
4.4 s3	0	0	No Work	-
4.4 s4	0	0	No Work	-

Item	Points	Progress	Priority	Score
Improve documentation for 4.4	13 pts	0/0 pts	High	55
Support multiple JUnit runs in Eclipse integration	8 pts	0/0 pts	Medium	61



## Background: Iteration Planning

- Created during an iteration planning meeting
- Decompose plan items into tasks
- Estimate tasks and defects planned for an iteration
- Team members sign-up for tasks during the iteration
- Owner schedules his task

Markus Kent		Load: 35/96   +61 h		Estimated: 67%	
Past (4 closed)					
Later This Week (5 open)					
	assertArrayEquals misses differences	🕒 2 hours	🚩 High		7
	Based on the assertThat syntax we should provide assumptions and theories support	🕒 2 days	📄 Unassigned		59
	testCount hard-coded to 1 for childless Description	🕒 -	📄 Low		27
	javadoc updates for @Ignore in 4.3	🕒 1 hour	📄 Unassigned		30
	assertThat fails with Class tests (documentation problem)	🕒 2 days	📄 Unassigned		10
Future (0 closed)					
Inbox (1 open)					
	Tests on protected methods fail	🕒 -	📄 Unassigned		14

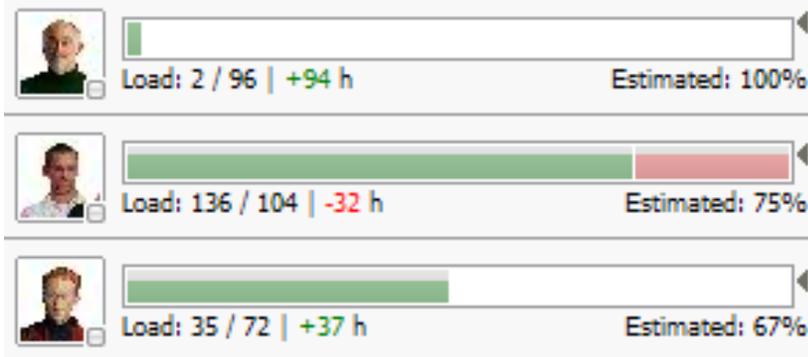
## Iteration Planning in RTC

- RTC provides different view modes
  - ▶ Breaking plan items into tasks
  - ▶ Tracking progress by owner during an iteration
  - ▶ ...
- Use **Load Bars** for capacity planning
- Use **Progress Bars** to track progress

Markus Kent		Load: 35/98   +81 h		Estimated: 87%	
PAST (4 closed)					
Later This Week (5 open)					
	assertArrayEquals misses differences	2 hours	High		7
	Based on the assertThat syntax we should provide assumptions and theories support	2 days	Unassigned		59
	testCount hard-coded to 1 for childless Description	-	Low		27
	javadoc updates for @Ignore in 4.3	1 hour	Unassigned		30
	assertThat fails with Class tests (documentation problem)	2 days	Unassigned		10
Future (0 closed)					
Inbox (1 open)					
	Tests on protected methods fail	-	Unassigned		14

## Work Load Bar

- **Problem:** avoid overbooking team members.
- **Solution:** Team Concert uses **work load** bars to show how much work is assigned to a contributor, and whether he is overbooked or not. A work load bar shows:
  - ▶ horizontally: the ratio of remaining work time (usually for an iteration) and upcoming work.
  - ▶ vertically: the percentage of estimated open work items
- So the less work items are estimated the less accurate the information is.
- Encourages estimation



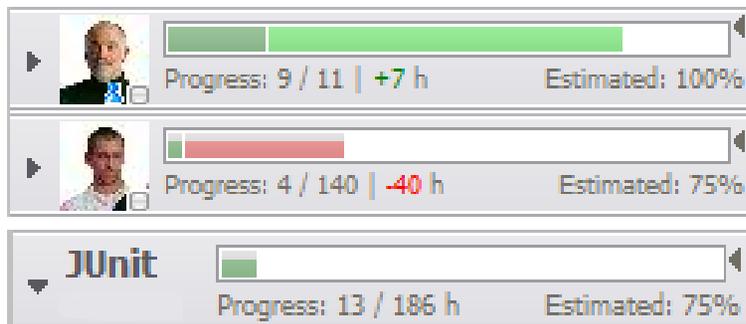
Upcoming work: 2 hours / Remaining work time: 96 hours ← not overbooked  
100% of open work is estimated

Upcoming work: 136 hours / Remaining work time: 104 hours ← overbooked  
75% of open work is estimated

Upcoming work: 35 hours / Remaining work time: 72 hours ← not overbooked  
67% of open work is estimated, but since 33% of the work items aren't estimated there will be very likely not much work time left

## Progress Bar

- **Problem:** team lead needs to know how well the team is doing in terms of progress.
- **Solution:** Team Concert uses **progress** bars to reflect the progress of a team, a contributor, or other grouping elements (tags, category, ...). A progress bar shows:
  - ▶ horizontally: the ratio of resolved and total work. If an iteration information and work assignment is available a projection of this ratio onto the ratio of spent work time versus total work time is shown as well.
  - ▶ vertically: the percentage of estimated open work items
- So the less work items are estimated the less accurate the information is.



Resolved work: 9 hours / Total work: 11 hours

Spent work time: 17 / Total work time: 96

$9 - 11/96 * 17 == 2$  hours ahead

Resolved work: 4 hours / Total work: 140 hours

Spent work time: 53 / Total work time: 168 hours

$4 - 140/168 * 53 == 40$  hours behind

Resolved work: 13 Hours / Total work: 186 Hours

No projection available

## Background: Backlog and Planned Time

### ■ Backlog

- ▶ Sorts the work items in backlog order. Rearranging work items in this sort mode will change its ranking on the backlog

### ■ Planned Time

- ▶ Sorts the work items in the order in which the owner of the work item intends to work on them. The owner defines this sequence typically in the My Work View.

View As: Backlog

assertEquals throws NPE while comparing null elements	High	31
assertArrayEquals misses differences	High	7
Based on the assertThat syntax we should provide assumptions and theories support	Medium	59
javadoc updates for @ignore in 4.3	Medium	30
Tests on protected methods fail	Medium	14
assertThat fails with Class tests (documentation problem)	Medium	10
assertEquals array comparison doesn't handle null elements	Low	33
testCount hard-coded to 1 for childless	Low	27
timeout doesn't work properly for >=2 cases in junit4.3?	Unassigned	13
assertThat signature does not match Matcher	Unassigned	9
CompositeRunner.filter incorrect if child throws NoTestsRema	Unassigned	4

**Jason Mitchell**  
Closed Items: 2 | Open Items: 4  
Load: 138/112 | -26 h  
Estimated: 100%

Past (2 closed)

Later This Week (4 open)

assertEquals array comparison doesn't handle null elements	1 day	Low	33
CompositeRunner.filter incorrect if child throws NoTestsRema	2 hours	Unassigned	4
assertThat signature does not match Matcher	1 day	Unassigned	9
assertEquals throws NPE while comparing null elements	3 weeks	High	31



# Daily Planning

- My Work View
- Developer plans assigned work
- Adjusts estimates

The screenshot displays the 'My Work' view in the IBM Rational software. The interface is organized into several sections:

- Inbox (JUnit Project):** Contains 6 new items. The first item is 'Based on the assertThat syntax we should provide assumptions and theories support' (4.4 m2, Framework, priority 5). The second is 'JUnit developers need more javadoc' (4.4 m1, JUnit, priority 5).
- Current Work (JUnit Project):** Contains 7 unread items. The 'Tomorrow (2 items)' section includes:
  - 'assertArrayEquals misses differences' (2h, priority 7)
  - 'assertThat fails with Class tests (documentation problem)' (2d, priority 10)
- Next Week (0 items):** Shows 'Vacation'.
- Imprecisely Planned Work (1 items):** Includes 'testCount hard-coded to 1 for childless Description' (priority 27).
- Future Work (JUnit Project):** Contains 2 unread items. The '4.4 m1 (1 items)' section includes 'Who's responsible to deploy in maven central repository?' (priority 11). The '4.4 rc0 (1 items)' section includes 'BaseTestRunner.getTest( ) requires class to extend TestCase' (priority 5).
- Preview:** Shows details for a 'New' task: 'assertArrayEquals misses differences'.
 

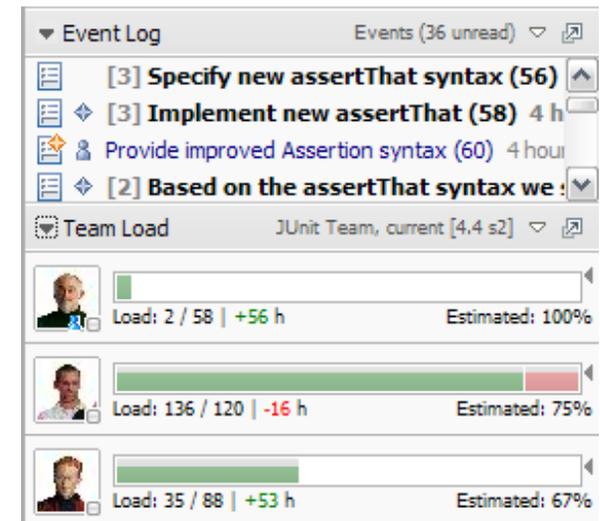
State	Summary
New	assertArrayEquals misses differences
<b>Creation</b>	<b>Assignment</b>
Type: Defect	Filed Against: JUnit
Severity: Major	Priority: High
Created: May 10, 2008	Planned For: 4.4 m2



## Daily Planning

- Triage important defects onto the Iteration Plan
  - ▶ Team Central, Team Load and Iteration Plan
- Run daily stand ups
  - ▶ Developer Taskboard to see what people are working on
  - ▶ Planned Time mode to check overall schedule

Markus Kent		Progress: 0.25/35.25 h		Estimated: 71%			
Closed Items: 4   Open Items: 7		To Do		In Progress		Done	
Improve documentation for 4.4	55	Javadoc updates for @Ignore in 4.3	30			[Docs] Cookbook TestRunner section incorrect	23
		assertArrayEquals misses differences	7			shows green bar while assert false	44
		testCount hard-coded to 1 for childless Description	27			Should not call derived's afters if super's before failed	47
		Tests on protected methods fail	14			@After method not called after my test timeout in 4.3.1	46
		assertThat fails with Class tests (documentation problem)	10				



# Plan Risk Assessment

Item Description	Priority	Duration	Probability	Item ID
Link for enhanced hovers in Work Item web	High	2 hours	1.0	71777
Project Area' functionality on the service layer	High	3 days	1.0	77066
of namespaces, no prefixes and media	High	2 hours	1.0	77921
1-0548);	High	2 days	1.0	76899
ident-tests.URIServiceTest.testCommentsJ	High	2 hours	1.0	54771
for this custom attributes at the same time	High	2 hours	1.0	76854
Include the 'Project Area' functionality on the service layer	High	2 hours	1.0	77291
workflowInfo on Resource is not updated on project area	Medium	2 hours	1.0	6997
Align ROA collection with OSLC's Atom and RDF Bags	Medium	2 days	1.0	70731
Consider to surface links as attributes in the Resource	High	4 hours	1.0	73224
workItem REST API shall also expose the 'Included in bulk	High	1 day	0.995	69697
Preserve Mentioned By links when their target is protected	Medium	2 hours	0.994	77322
OSLC/REST cleanup	High	1 hour	0.749	77096
Check enforcement of permissions for Web UI bulk operation	Medium	4 hours	0.629	68972
Specify a consistent Date/Time format for migration problem	Medium	1 hour	0.605	64246
PUT/POST	Medium	4 hours	0.490	64247
work item in the	Unassigned	4 hours	0.109	76150
page returned to the Web UI	Medium	3 hours	0.083	74890
ultitext search was scoped by	Unassigned	4 hours	0.057	74767

More detailed developer estimation... low, nominal, high

calculates probability of task fitting into the schedule

Color codes high risk tasks for quick identification and action

## Risk Assessment for my planned work

- Probability of completion is shown in the My Work View

The screenshot displays the 'My Work View' in Rational Team Concert, showing a list of work items categorized by time period. The 'Current Work' section is expanded, showing a progress bar and a list of items with their estimated completion times and probabilities. The 'Later This Week' section contains 6 items, and the 'Next Week' section contains 25 items. The items are listed with their titles, estimated completion times, and probabilities.

Item Title	Estimated Time	Probability
Pressing Ctrl+Enter does not add work item in Planned Items page	1h	77850
Dropping work item in my work view into tomorrow group does not adopt work item	2h	66883
MWV does move work items dropped from future work to the end of the current work list	1h	80063
SortedViewMode expands all entries in Web UI	30m	74788
Inbox section of My Work shows work items that i assigned to myself	2h	78237
Vacation entries shown differently in Web UI and Rich UI	1h	78409
"Current Work" section shows past absences	1h	69983
Moving folders can duplicate them in the Web	1h	79505
Add valuesets to all plan item attribute, where applicable	2h	72906
Problem Severity is missing for WebUI problems	1h	76218
Work Assignments total should not count archived development lines	30m	76613
Folder counts are not updated correctly	10m	66056
Filter parent work items when "hide resolved" filter is enabled	1h	60535
Add time-remaining validation checks	2h	79095
Colorize autocompletion does not work	4h	78913
Eclipse Plan Editor colorize Expression field pop-up covers attribute scroll bar	4h	75973
Filter/Colorize: no content assist for tags	1h	75856
Colorize expression for overdue or due soon	1h	58471
Make PlanChecker results queryable through QuickQuery	2h	72889
Auxiliary data is not duplicated when duplicating a plan mode	1h	66242
Iteration Plan Editor Error connecting to Repository	1h	52328
Grouping should be disabled when in 'Rank' style	1h	75907
Internal error creating work item in context of plan	4h	73115
AFE after switching the Project Area in MWV	1h	70303
AFE when D&Ding work items onto a plan folder	2h	70414
this.start.getDate() is undefined	1h	72079
Bidi_1.0:Exception In Planned Items tab in the iteration plan	1h	75827
NPE while loading plan	2h	70602
ConcurrentModificationException in com.ibm.team.apl.internal.common.util.ItemAwareMap\$ValueCollectionIterator.next	2h	63742
Exception adding task to plan	2h	60339
My Work view says I should log in again, but I'm already logged in	1h	63145





## Configuring the Plan Editor

- The Plan editor can be configured in several ways:
- Content
  - ▶ Defines the Style (flat, tree, etc), Grouping, Sorting and Filtering
- View Layout
  - ▶ Defines the visible columns
- Colorize
  - ▶ Defines colorize expressions

**JUnit Product Backlog**  
Team Area: JUnit Team | Iteration: 4.4 | 1 Closed | 1 Open  
Overview | Planned Items | Charts | Retrospective  
Progress: 3/24 pts | Estimated: 100%

View As: Teams

JUnit Team		Progress: 3/24 pts		Estimated: 100%	
Closed Items: 1   Open Items: 2					
	Improve documentation for 4.4	13 pts	0/0 pts	High	55
	Provide improved Assertion syntax	3 pts	0/0 pts	Medium	60
	Support multiple JUnit runs in Eclipse integration	8 pts	0/0 pts	Medium	61

Plan items of the current iteration are colorized in green

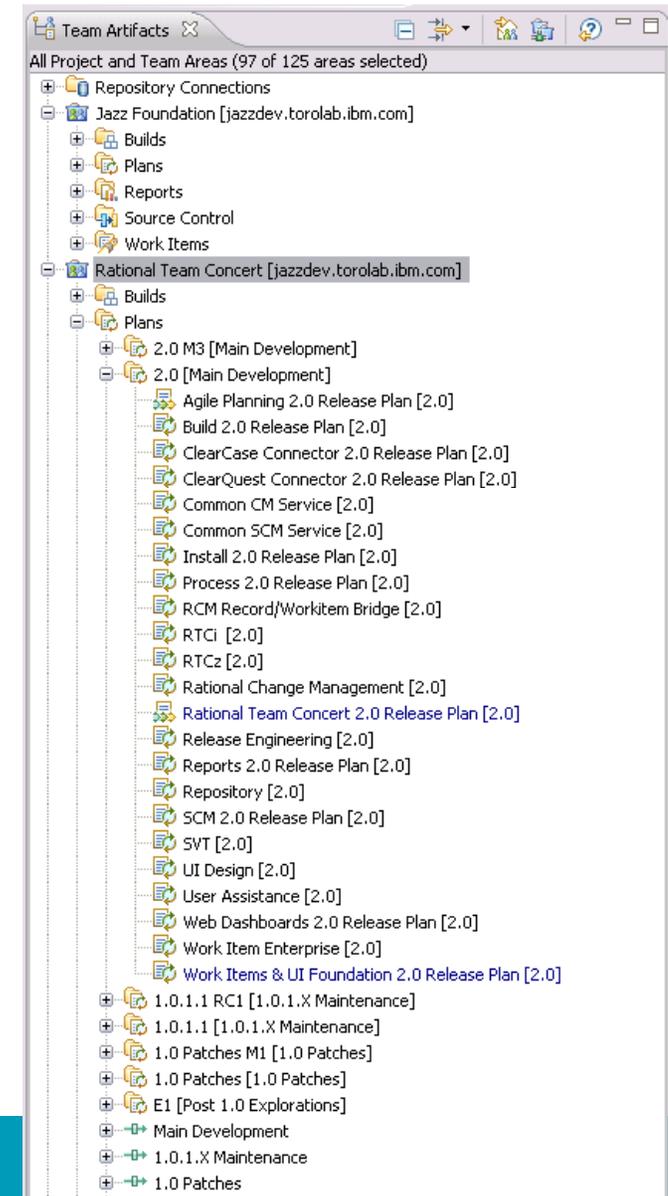
# Agenda

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- Agile Planning Introduction
- A Scrum Planning Episode
- **How we use Agile Planning for Developing RTC**
- What's new in 2.0

# Using RTC to Plan and Deliver RTC 2.0 - Overview

- Release Plan
  - ▶ Define themes
  - ▶ Define plan items
  - ▶ Plan Item Work item type
- Tracking a Release
  - ▶ Effort less status tracking
  - ▶ Progress
- Iteration Planning (Scrum of Scrum)
  - ▶ Tracking cross team efforts
  - ▶ Tracking burn down across teams
  - ▶ Retrospectives
- Tracking Dependencies across teams



## Our Distributed Team





## Our Tracked Items

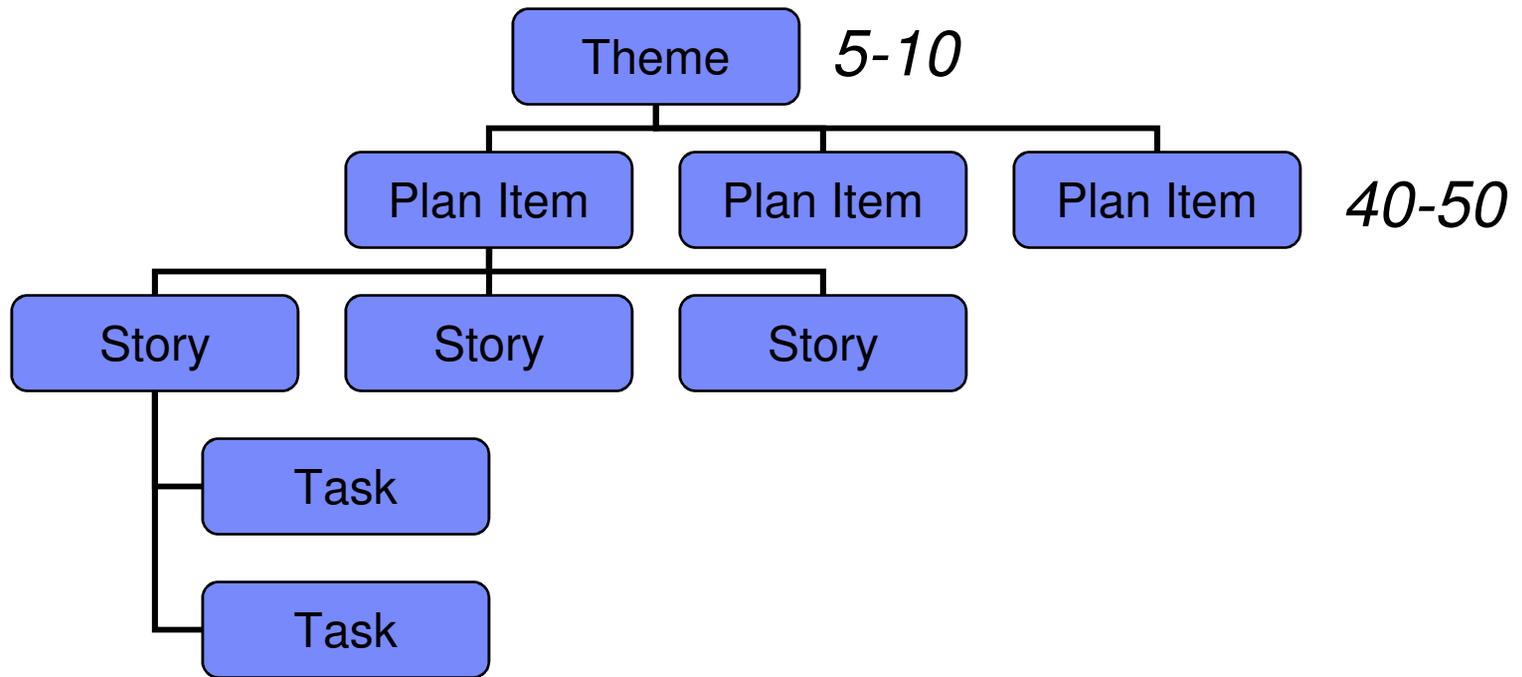
- Planning
  - ▶ Plan items, Stories, Tasks
- Tracking
  - ▶ Build status
  - ▶ Adoptions
- Feedback
  - ▶ Defects
  - ▶ Enhancement
  - ▶ Retrospectives

-  Defect
-  Task
-  Enhancement
-  RFS
-  Plan Item
-  Track Build Item
-  Retrospective
-  Story
-  Adoption Item

## Our Release plan

- Defines
  - ▶ **themes** and features
  - ▶ coarse grained
- Themes define the high-level customer value
- Product wide backlog of Plan Items/features
  - ▶ ranked
- Plan items are broken down into Stories and Tasks

# Our Plan Structure



## Release Planning

- Planning a release
  - ▶ Aligning with the business objectives
  - ▶ tracking progress
    - Done criteria

# Release Plan Overview

The screenshot shows a web browser window titled "Java - Iteration plan 'Rational Team Concert 2.0 Release Plan - 2.0' - Rational Team Concert". The browser's address bar shows the URL: "Rational Team Concert 2.0 Release Plan [2.0] - Iteration plan 'Rational Team Concert 2.0 Release Plan - 2.0'". The page content includes:

- Rational Team Concert 2.0 Release Plan** - Problems detected
- Team Area: Jazz Development | Iteration: 2.0 (10/27/08 - 6/26/09) | [29 Closed](#) | [58 Open](#)
- Progress: 0/0 | 0 h | Estimated: 66%
- RTC 2.0 Release Plan**
- See also the [Published Release Plan](#) on jazz.net.
- Plan is structured as follows:
  - Planned Items: the backlog of plan items sorted by decreasing priority (view as group by folder, user defined sort order)
  - Themes: describes the themes for this release
- Plan Status Dashboard page**
- [Plan Item Status overview](#)
- Plan Tracking Items**
  - [RTC 2.0 Plan Status Updating \(67653\)](#)
  - [RTC 2.0 plan approval tracking \(62601\)](#)

# Release Backlog

Java - Iteration plan 'Rational Team Concert 2.0 Release Plan - 2.0' - Rational Team Concert

File Edit Navigate Search Project Run Window Help

Rational Team Concert 2.0 Release Plan [2.0] - Iteration plan 'Rational Team Concert 2.0 Release Plan - 2.0' »4

**Rational Team Concert 2.0 Release Plan** ▾ [Problems detected](#) Save

Team Area: Jazz Development | Iteration: 2.0 (10/27/08 - 6/26/09) | [29 Closed](#) | [58 Open](#) Progress: 0/0 | 0 h Estimated: 66%

**Planned Items** Progress: 0/0 h Estimated: 61%

Closed items: 9 | Open items: 46

Project level read access control	0/0 h	High	62548
Server performance and scaling data	0/0 h	High	62550
Recipes for high availability servers	0/0 h	High	<a href="#">65926</a>
Enable other bundlings of RTC components	0/0 h	High	62552
Provide REST API for work items	0/0 h	High	62523
Support multi-repository dashboards	0/0 h	High	62556
Repository consolidation	0/0 h	High	65597
RTC client for VS IDE – build, team status view	0/0 h	High	62730
Support planning in web UI	0/0 h	High	62545
<b>Improve Scrum support</b>	0/0 h	High	62525
Provide web UI for builds	0/0 h	High	62540
Improve work item customizability	0/0 h	High	62528
More flexible workspace loads	0/0 h	High	62534
SCM logical resource support	0/0 h	High	62533
Common user identity	0/0 h	Medium	65927
RTC SDK	0/0 h	High	65924
SCM: Server operation logging	0/0 h	High	63105
ClearCase importer	0/0 h	High	62537
Improve management of sync streams	0/0 h	High	62518
ClearQuest Connector set-up improvements	0/0 h	Medium	62517

# Project Release Plan: Team of Team Release Plan

**Rational Team Concert** Your Trial License expires in 67 days | **Erich Gamma** | Log Out

Dashboards Project Areas Work Items **Plans** Builds Reports Admin Rational Team Concert

---

**Rational Team Concert 2.0 Release Plan**

Team Area: RTC Development | Iteration: 2.0 (10/27/08 - 6/26/09) | 128 Closed | 61 Open

Overview **Planned Items** Charts Themes Progress: 240/764 pts Estimated: 100%

View As: Teams

**RTC Development**  
Closed Items: 130 | Open Items: 63 Progress: 240.5/764.5 pts Estimated: 100%

Project level read access control	2.0 M3	2/2	High	62548
Server performance and scaling data	2.0 RC4	1/1	High	62550
Provide REST API for work items	2.0	0/2	High	62523
RTC client for VS IDE – build, team status view	2.0	0/0	High	62730
Enable other bundlings of RTC components	2.0	1/1	High	62552
Support planning in web UI	2.0	2/2	High	62545

**Agile Planning**  
Closed Items: 37 | Open Items: 2 Progress: 71/72 pts Estimated: 100%

**Build**  
Closed Items: 11 | Open Items: 0 Progress: 19/19 pts Estimated: --

User can cancel/abandon builds	2.0 RC1	1 pts	0/0	High	61487
User can delete a build result	2.0 RC1	1 pts	0/0	High	78487
User can view extra info about a build, sufficient to analyze build failures	2.0 RC1	3 pts	0/0	High	77600
User can browse build results by definition	2.0 M2D1	5 pts	0/0	High	66960
User can view the overall build queue for the project area	2.0 M3	3 pts	0/0	Medium	76683
User can list build engines and their status	2.0 M3	1 pts	0/0	Medium	67156
User can navigate to the web UI for a particular build result	2.0 M2D1	1 pts	0/0	Medium	66963
User can report a new work item against a build result	2.0	2 pts	0/0	Unassigned	76684
User can request a rebuild	2.0 M3	1 pts	0/0	Unassigned	67154
User can request a build from a build definition	2.0	1 pts	0/0	Unassigned	67152

# Backlog Grouped by Themes

**Rational Team Concert** Your Trial License expires in 67 days | Erich Gamma | Log Out | ?

Dashboards | Project Areas | Work Items | **Plans** | Builds | Reports Admin | Rational Team Concert

---

**Rational Team Concert 2.0 Release Plan**

Team Area: RTC Development | Iteration: 2.0 (10/27/08 - 6/26/09) | 128 Closed | 61 Open

Overview | **Planned Items** | Charts | Themes

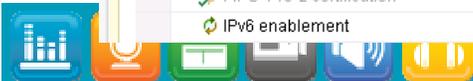
Progress: 240/764 pts Estimated: 100%

View As: **Backlog by Themes**

Theme	Closed Items	Open Items	Progress	Estimated
<b>Modularity</b>	0	0	0/0 pts	--
<b>Team First</b>	8	0	0/0 pts	--
<b>Jazz Product Family</b>	9	2	0.5/0.5 pts	100%
<b>Web Access</b>	8	0	0/0 pts	--
<b>Easy to Use</b>	4	9	0/0 pts	100%
<b>Coexistence</b>	7	5	0/0 pts	100%
<b>Easy to Setup &amp; Maintain</b>	2	2	0/0 pts	100%
<b>Enterprise Scalable &amp; Secure</b>	17	4	0/0 pts	100%

Project level read access control	2.0 M3	2/2	High	62548
Server performance and scaling data	2.0 RC4	1/1	High	62550
Support to view viewlets from different projects on a single dashboard page	2.0 M3D1	0/0	High	63634
Recipes for high availability servers	2.0	0/0	High	65926
Support 64-bit server environments	2.0 M3	0/0	High	66025
SCM: Server operation logging	2.0	0/0	High	63405
Improve work item customizability	2.0	0/0	High	62528
Repository consolidation	2.0	0/0	High	66597
More flexible workspace loads	2.0	0/0	High	62534
Support enterprise license	2.0 RC1	0/0	Medium	71994
AIX 5.3 TL 7 for p-Series	2.0 RC2	0/0	Medium	66936
FDCC compliance	2.0 RC2	0/0	Medium	65932
VMware support	2.0	0/0	Medium	66933
FIPS-140-2 certification	2.0 RC1	0/0	Medium	66930
IPv6 enablement	2.0 RC2	0/0	Medium	65929



# Backlog with Plan Item Preview

The screenshot displays the IBM Rational Team Concert (RTC) interface. The main window title is "Java - Iteration plan 'Rational Team Concert 2.0 Release Plan - 2.0' - Rational Team Concert". The interface is divided into several sections:

- Planned Items:** A list of tasks with their IDs and progress indicators. The item "Improve Scrum support" (ID 62525) is highlighted.
- Plan Item 62525 Details:** A detailed view of the selected item, including:
  - Type: Plan Item
  - Progress: 3/3 h (75% estimated)
  - Team Area: Jazz Development / Rational Team Concert
  - Filed Against: PMC
  - Tags: (empty)
  - Dev Status: On Track
  - Theme: Team First
  - Priority: High
  - DCP Boca: Base Content
  - Crossteam: (checked)
  - Complexity: Significant
  - Owned By: Erich Gamma
  - Planned For: 2.0
- Description:** A text area containing the description: "Improve Scrum support. V Scrum-style backlog planning w for a release are arranged in p be grouped by iterations, and l sprints/iterations. We should in progress on tasks by providing presentation of the work items".
- Discussion:** A list of comments from team members, including Dirk Baeumer, James Moody, and Julian Jones, discussing the item's status and planning.
- Quick Information:** A summary of related items, including subscribers (17), children (10), blocks (1), and related items (0).

# Plan Item

- Custom Attributes
  - ▶ Complexity
  - ▶ Development status:
    - on track
    - at risk
    - behind
  - ▶ Done criteria
- Workflow
  - Proposed
  - Committed
  - Done

62525: Improve Scrum support - Rational Team Concert

Plan Item 62525

Summary: Improve Scrum support

Details

Type: Plan Item

Progress: 3/3 h Estimated: 100%

Team Area: RTC Development / Ra...rt

Filed Against: PMC

Tags:

Dev Status: On Track

Theme: Team First

Priority: High

Base Content

Complexity: Significant

Owned By: Erich Gamma

Planned For: 2.0 RC1

Resolution Date: May 16, 2009 11:55 AM

Resolved By: Erich Gamma

Quick Information

Subscribers (19): AM, BB, BG, BC, CP, DB, EG ...

Children (11): 63593, 64125, 64126, 64243 ...

Blocks (1): 66117

Related (1): 55875

Mentions (3)

Description

**Improve Scrum support.** We should improve Scrum-style backlog planning where items planned for a release are arranged in priority order, can be grouped by iterations, and be assigned to sprints/iterations. We should improve tracking of progress on tasks by providing a task board presentation of the work items planned in progress for an iteration. We should also add a release burndown chart. [Theme: Team First]

Discussion (14 comments)

Any plans to support "planning poker" in the context of improved Scrum support?

4. Dirk Baeumer, Jan 27, 2009, 11:26 PM  
No, there are no plans to support planning poker for 2.0.

5. Julian Jones, Jan 27, 2009, 11:30 PM  
thanks for the update.

6. Artem Marchenko, Feb 2, 2009, 10:20 AM  
Is it possible to make sure #51074 and #55875 are included?  
Real product backlog with history of estimates and real release burndown (based on this history) are important for Scrum users.

7. Artem Marchenko, Feb 2, 2009, 10:20 AM  
work item 51074 and work item 55875

8. Dirk Baeumer, Feb 3, 2009, 2:36 PM  
A real flat backlog will come for 2.0. What will not come is plan baselining so that you can see how estimates have changed for a whole plan during on iteration. But you can always see the history of a single item in the work item editor.

9. Dirk Baeumer, Feb 18, 2009, 12:39 PM  
R

10. Dirk Baeumer, Feb 18, 2009, 12:40 PM  
Assessed Dev. Status: wok is still on track

11. James Moody, Apr 24, 2009, 7:49 PM  
M3 status update from the Reports team: In M3, we added a Release Burndown report. We have also added an "estimated" line to the Burndown report, renamed Team Velocity to "Estimated vs Actual Work" and renamed "Story Points by Iteration" to "Team Velocity" (to be more consistent with popular usage of the term "Velocity"). We also added a new report which shows the number of total story points per iteration (planned and achieved) to aid in distribution planning, and made some minor upgrades to other reports.  
We are also honouring the "Top Level Work Item Types" setting, as well as the "Work Item Complexity" attribute in all of the applicable reports.  
In RC1 I will add an estimated line to the Release Burndown report, and also make sure the iterations are sorted by date instead of alphabetically.  
So our work here is on track and nearly complete.

12. Erich Gamma, May 12, 2009, 12:49 PM  
The complete RC1 update to Scrum templates, as included in work item 36007

Overview | Links | Approvals | Done Criteria | History



# Plan Item: Done Criteria

62525: Improve Scrum support - Rational Team Concert

Plan Item 62525

Summary: Improve Scrum support

Closed

Implemented

**Done Criteria**

Provided features:

- taskboard mode
- real product backlog management
- flat backlog
- user customizable ranking
- reports "Story points per backlog's iteration"

Additional **Done criteria**: the Scrum template has incorporated these features.  
See also [work item 79687](#).

Overview | Links | Approvals | Done Criteria | History

# Release Plan Status Tracking

- Painless status tracking
- Status updating is tracked in a task with approvals
- Status updated at end of each iteration

Java - Rational Team Concert - Rational Team Concert

File Edit Navigate Search Project Run Window Help

Task 67653

Summary: RTC 2.0 Plan Status Updating Reopened

Approver	State	Due
M1 Status update	Approved	Jan 22, 2009
M2D1 Status Update	Approved	Feb 3, 2009
M2 Status Update	Approved	Mar 12, 2009
M3D1	Pending	Apr 2, 2009
André Weinand	Approved	
Carol Yutkowitz	Pending	
Chris Daly	Pending	
Dejan Glozic	Pending	
Dirk Baeumer	Pending	
Jean-Michel Lemieux	Pending	
John Vasta	Pending	
Nick Edgar	Pending	
Rafik Jaouani	Pending	

Overview Links Approvals History

269M of 444M <No Current Work> 14026 Hits

# Dashboard with Plan Item Status

Dashboard: RTC Development > ...

Rational Team Concert Your Trial License expires in 30 days | Erich Gamma | Log Out

Home Project Areas **Dashboards** Work Items Plans Reports Admin Rational Team Concert

All Dashboards > Rational Team Concert >

**RTC Development**

General **2.0 Plan** Open Defects by Themes Builds Open Defects by Team SVT Defects by Team Defect Trend Comparison Defect Trends by Priority Closed Daily M3D1, M3 Tests 1.0.1

2.0 DCP Burndown M3D1 Add New Tab Add Viewlet

**Recently Viewed**

- RTC Development
- Erich Gamma's Dashboard

**My Dashboards**

- Erich Gamma's Dashboard

**Shared Dashboards**

- My Profile
- Rational Team Concert
- Jazz 1.0.1.X Maintenance
- RTC Development**
- Work Item
- All Dashboards

**Plan Related Links**

- Detailed Release Plan
- Plan Item Status Description
- Published Release Plan
- Status Tracking Item

**Plan Items at Risk (2)**

- 62533: SCM logical resource support
- 65932: FDCC compliance

**Plan Items Blocked (0)**

No work items found.

**Plan Items Behind (5)**

- 62517: ClearQuest Connector set-up improvements
- 62540: Provide web UI for builds
- 62537: ClearCase importer
- 65925: Support 64-bit server environments
- 62541: Work items improve parity between eclipse and web UI

**Plan Items on Track (29)**

- 69063: Move the bundled Eclipse from 3.3 to 3.4
- 73767: ClearQuest Bridge
- 65933: VMware support
- 65936: AIX 5.3 TL 7 for p-Series
- 66057: Obtain quality certification
- 62543: Web UI for process permission editing
- 65934: Accessibility
- 62531: SCM file locking
- 62546: Complex text enablement
- 71891: Support enterprise license
- 65922: Reporting across relationships
- 62538: Provide ClearQuest Importer
- 62730: RTC client for VS IDE – build, team status view
- 62523: Provide REST API for work items
- 62550: Server performance and scaling data
- 62525: Improve Scrum support
- 62556: Support multi-repository dashboards
- 62529: Improve work item customizability

**Open 2.0 Plan Items (40) Dev Status**

Status	Count
On Track	30
Behind	5
Not Started	2
At Risk	3

**Plan Items not Started (2)**

- 65926: Recipes for high availability servers
- 63105: SCM: Server operation logging

Deferred items are Plan Items from the backlog that are not in scope for RTC 2.0.

**Plan Items Deferred (19)**

- 62516: Project restructuring on the same and across servers
- 71890: Pre-sales sizing assessment tool
- 65928: Improve remote/WAN performance
- 62551: Support UI scalability in the face of many projects
- 62539: Support ClearQuest Multisite configurations
- 62527: Improve approval for change sets
- 65935: Solaris 10 on SPARC
- 62830: Support instant messaging (IM) in the Web UI
- 65597: Repository consolidation

# Project Management Iteration Plan

- Defines mandates from the project management team
  - ▶ Themes
- Buddy Review Tracking

PMC [2.0 M3] - Plan 'PMC - 2.0 M3'

Team Area: RTC Development | Iteration: 2.0 M3 (3/30/09 - 4/24/09) | 15 Closed | 3 Open

No Work Estimated

### PMC Plan M3D1

- The **Planned Items** tab - shows the work items corresponding to the plan **view in Group by Team Folders**
- The **Component Summary** tab provides an overview of the committed deliverables for this iteration.

#### Timelines

- RTC [Timeline](#)
- JF [Timeline](#)

#### 2.0 PMC Mandates Roadmap

The road map is described [here](#)

#### Themes

- New adoptions
  - [Adopt CSS optimization / modularity system \(71903\)](#)
  - [Process migration helpers are now keyed to component models \(72926\)](#)
  - User setting user interface in Web/UI. The UI will come in FM\_RCO and the change needs adoptions from components. See [Contribute overview page to the user settings \(75402\)](#)
- Ensure that all started adoptions are in a done/done/done state meaning they are implemented, tested and deployed.
  - [Read Permission Adoption \(69524\)](#)
  - [Enable project areas with no teams \(65343\)](#)
  - [Team areas can exist outside a development line \(65330\)](#)
  - [Enable showing artifacts \(builds, plans, streams, etc\) in the project area editor \(72920\)](#)
  - [Implement Eclipse 3.3 -> 3.4 \(72921\)](#)
  - [Implement and Test RTC without Build, SCM \(64810\)](#)
- Performance
  - Performance work based on the large-scale performance testing
  - Performance pass to ascertain impact of major changes such as read permissions
- Complex text and accessibility enablement
  - Complex text enablement: Change sets from Tod need to be reviewed and delivered by the teams
  - Accessibility enablement: Change sets from Tod need to be reviewed and delivered by the teams
- C/ALM
  - A list of wishes from C/ALM against RTC can be found [here](#). C/ALM is a joined effort from Jazz Foundation, RQM, RRC and RTC, RTC. We should address important requests from C/ALM.

#### PMC Work

- [Define SDK Contents \(66475\)](#)

#### Buddy Review Tracking

[M3 PMC Buddy Plan Review \(75788\)](#)

Overview | Planned Items | Charts | Component Summaries



## Cross Team Dependencies/Adoptions

- **Adoptions:**
  - ▶ Changes from lower layers that need to be adopted by other teams
    - Require approval from the project management team
  - ▶ “Lookahead planning”
    - New API delivered in M2 by team A
    - Adopted during M3 by team B, C, D
- **Expectations**
  - ▶ Dependencies among teams
    - Tracked using work item links

# Adoption Work Item Type

- Attributes
  - ▶ Affected teams
  - ▶ Impact
- Workflow
  - ▶ Proposed
  - ▶ Approved
  - ▶ Done

The screenshot displays the IBM Rational Team Concert web interface for an Adoption Item. The browser title is "Java - Rational Team Concert - Rational Team Concert". The page shows the details of "Adoption Item 64477" with a summary of "Adopt new web UI code". The status is "Completed" and it has been "Adopted".

**Details:**

- Type: Adoption Item
- Impact: Moderate
- Affected Teams: Agile Planning, Build, Dashboard
- Creation Date: Nov 17, 2008 2:48 PM
- Created By: Bill Higgins
- Team Area: Web UI Foundation / Rational Team Concert
- Filed Against: UI Foundation/Web UI
- Owned By: Bill Higgins
- Tags:
- Priority: Medium
- Planned For: 2.0 M1
- Due Date: None
- Resolution Date: Dec 18, 2008 1:59 PM
- Resolved By: Erich Gamma

**Description:**

**Context**

In Summer / Early Fall 2008, the Foundation Web UI teams (Bill's frameworks team and Dejan's common component) did some explorations to make early progress on what we thought it would take for Jazz Web UIs to work in the Integration Architecture (JIA). We basically did this work in a branch and didn't try to keep Rational Team Concert 1.0.1 code backwards compatible because we didn't know if we'd need to and we were being strategically lazy.

We now understand that because of RTC constraints (compressed schedule, lots of committed high-priority product features) and because of the relative immaturity of JIA, it's unreasonable to expect upstream web components to adopt a new programming model any time soon. We have basically two options:

**Discussion (6 comments; 1 new)**

- From Richard Backhouse's mailing list note:
- The new Web UI Foundation code has been delivered to the [Foundation Stable 1.0 FM1](#) Stream.
- Please be aware that the Web UI code now resides in its own component called "Foundation Web UI". If you are accepting the new changesets into your development environment you must make sure that you also accept the new component too otherwise you will see compile errors. Also you will have to make changes to your equipment launches as new Web UI bundles are required as dependencies. The "Embedded Jetty for Web UI Development" launch can be used as a guideline on what is required.
- Please contact me with any questions.
- Richard
- 4. [Darin Swanson](#), Dec 9, 2008, 7:48 PM  
ShrinkSafe also adds another wrinkle to double check: use of eval()
- See [bug 65606](#) for a specific case but with ShrinkSafe usage you cannot have references to a variable name string passed to eval.
- 5. [Erich Gamma](#), Dec 18, 2008, 1:15 PM  
Adrian - can we declare this adoption as completed?
- 6. [Adrian Cho](#), Dec 18, 2008, 1:30 PM  
Yes, the last component to adopt was SCM and John declared on Tuesday's planning call that they are complete.

**Quick Information**

- Subscribers (11): AC, CL, DS, CL, DS, DG, EG, HFD, JM, JC ...
- Attachments (2): 16288, 16289
- Children (3): 65021, 65051, 65764
- Related (4): 64572, 65505, 65606, 65897
- Mentions (5)
- Mentioned By (5)

Navigation: Overview | Links | Approvals | Custom | History



# Adoption Items on the Dashboard

Dashboard: RTC Development - I...

Rational Team Concert

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Home Project Areas **Dashboards** Work Items Plans Reports Admin

Rational Team Concert

Type to search

All Dashboards > Rational Team Concert >

**RTC Development**

General 2.0 Plan Open Defects by Themes Builds Open Defects by Team SVT Defects by Team Defect Trend Comparison Defect Trends by Priority Closed Daily M3D1, M3 Tests 1.0.1

2.0 DCP Burdown M3D1 Add New Tab Add Viewlet

**2.0 Release Plan available**

**Description RTC Development**

**Umbrella area for all RTC development work**

Development work is done in a separate development line named 'development'. This team area is the parent of all team areas dedicated to the RTC development work. The development work is structured around releases.

Each component team that actively contributes to the development work is represented with its own child team area.

The RTC PMC oversees the development work. Team members listed in this team area are working across all component boundaries.

**Open Track Build Items (1)**

76645: Track 2.0 M3D1a (week of March 30, 2009)

**Work Item Queries**

Retrospectives (115)  
QCert: Open Blocking, Critical Defects (SVT, FVT, Development) (10)

**Open Blocker and Critical Defects (31) Filed Against**

Work Items	31
Source Control	15
Agile Planning	15
JRS	15
Release Engine...	15
Visual Studio Client	10
ClearCase Conne...	10
Build	5
ClearQuest Bridge	5

**Open Globalization (Must Fix) (6) Filed Against**

Agile Planning	6
Install	6
Process	6
Visual Studio Client	6
Work Items	6
Work Items/Eclips...	6

**Accessibility Change Sets Requiring... (11) Filed Against**

Work Items/Web UI	11
Agile Planning/...	3
Build	1
Agile Planning/W...	1

**Bi-di Change Sets Requiring Approval (1) Filed Against**

**Approved Team Adoptions (7)**

- 69524: Read Permission Adoption
- 71903: Adopt CSS optimization / modularity system
- 68988: Removal of "Repository Client" component from foundation
- 72920: Enable showing artifacts (builds, plans, streams, etc) in the project area editor
- 65343: Enable project areas with no teams
- 65330: Team areas can exist outside a development line
- 66185: IFilesystemRestClient API changes for 2.0

**Proposed Team Adoptions (1)**

- 72926: Process migration helpers are now keyed to component models

**Cross Team Expectations (2)**

- 61490: Daemon APIs to get/set Jazz Source Control preferences
- 63022: Need to identify work items that are resolved invalid and duplicate

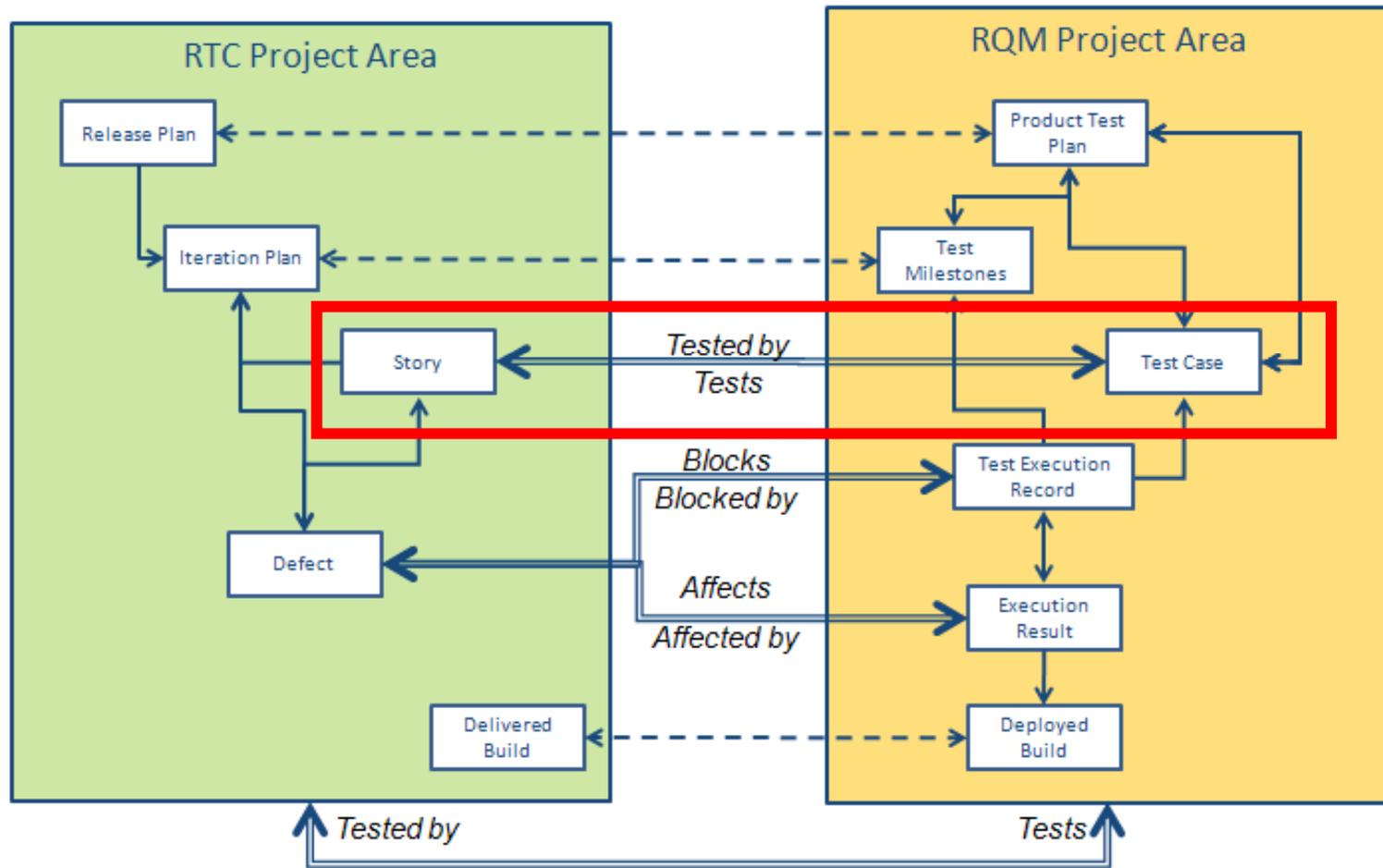
**JF 1.0 X-Expectations (6)**

- 64884: ShrinkSafe forward reference problem
- 63787: ValidatingX509TrustManager will accept any signed certificate
- 69890: Support sorting by state extension values on a named key
- 70562: Add support for streaming input args for large in lists
- 71439: Guard against custom serializers in ItemRenderService if a specific format is expected
- 70615: Need mechanism to find items where links do not exist

## More support for Agile at Scale

- **RTC Build**
  - ▶ personal builds
  - ▶ build snapshots
- **Buildforge Integration**
- **Jazz SCM**
  - ▶ isolation/integration using stream flow hierarchies => show our flow structure
  - ▶ private versions for code exploration
  - ▶ suspend resume for task isolation
- **Dashboards**
  - ▶ for transparency

# Agile Planning & Collaborative ALM



----- Logical equivalent, not a literal relationship

# C/ALM Link Queries

The screenshot shows the Rational Team Concert web interface. At the top, it says 'Rational Team Concert' and 'Your Trial License expires in 63 days | Scott | Log Out'. Below that is a navigation bar with 'Dashboards', 'Project Areas', 'Work Items', 'Plans', 'Source Control', 'Builds', and 'Reports'. The main content area is titled 'SmarterLiving\*' and has tabs for 'Overview' and 'Testing'. Under 'Testing', there are three panels:

- Stories with failing tests (1)**: Contains one item: '36: Implement login dialog'.
- Stories ready for testing (2)**: Contains two items: '36: Implement login dialog' and '37: Support user profiles'.
- Defects blocking tests (1)**: Contains one item: '50: Failing Test Case "Login test" when executing Test Execution Record "Logintest\_Firefox"'. A blue callout box points to this item with the text 'Defects blocking test execution'.

Stories with failed tests

Defects blocking test execution

## Summary

- RTC 2.0 covers the planning onion
- Much improved scrum and scrum of scrum support
- Planning for everybody in eclipse and web

# Questions



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- Webcast: Using Rational Team Concert in a Globally Distributed Team
  - ▶ <https://jazz.net/blog/index.php/2009/01/06/webcast-using-rational-team-concert-in-a-globally-distribute-team/>