

ScrumWorks® Pro Tutorial: Using ScrumWorks Pro - A Beginner's Guide

Question:

“I have installed ScrumWorks Pro. Where do I go from here?”

This tutorial addresses the topic by providing a step-by-step guide for getting started.

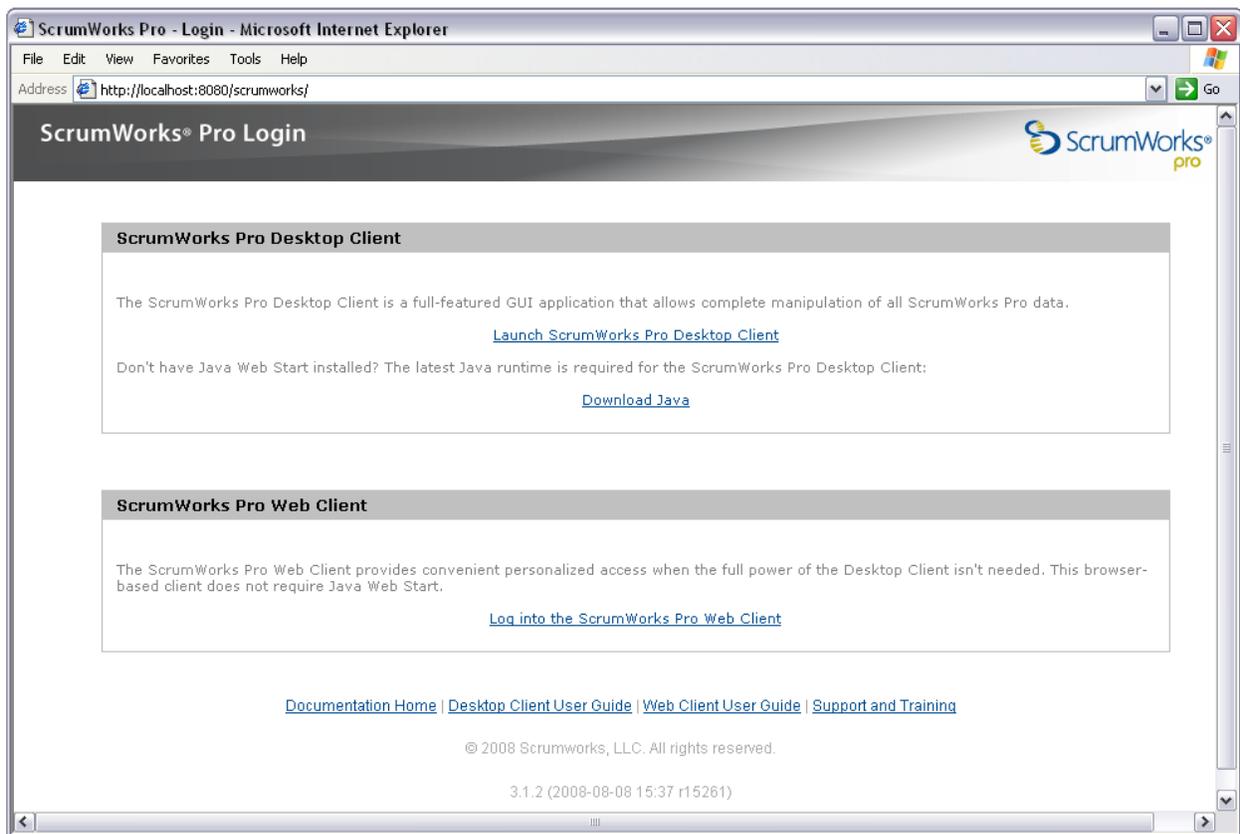
The Desktop and Web Clients: Accessing ScrumWorks Pro

ScrumWorks Pro is a networked multi-user application. All data is housed on a central server and can be accessed by connecting to that server using either the Desktop or Web Clients.

Once ScrumWorks Pro server installation is complete, point your internet browser to:

`http://hostname:8080/scrumworks`

where "hostname" should be replaced with the hostname or IP address of the server where the ScrumWorks Pro server-side component is installed.



Example of accessing ScrumWorks Pro from the machine it is installed on (localhost)

The Desktop Client is the primary administrative interface to ScrumWorks Pro and requires that Java be installed. If Java is already installed on this system, you can simply click on the link “Launch ScrumWorks Pro Desktop Client”. If not, you may install it using the "Download Java" link.

The Desktop Client: Getting Started with a New Product

Before our Team(s) can begin working with ScrumWorks Pro, we will need to set up Products and Teams and then place the newly created Users within these Teams. To facilitate this process, ScrumWorks Pro includes a "Product Creation Wizard" feature.

Once you have opened an instance of the Desktop Client, select:
"File > New > Product from Wizard"

You will be greeted with a screen that contains a series of steps:



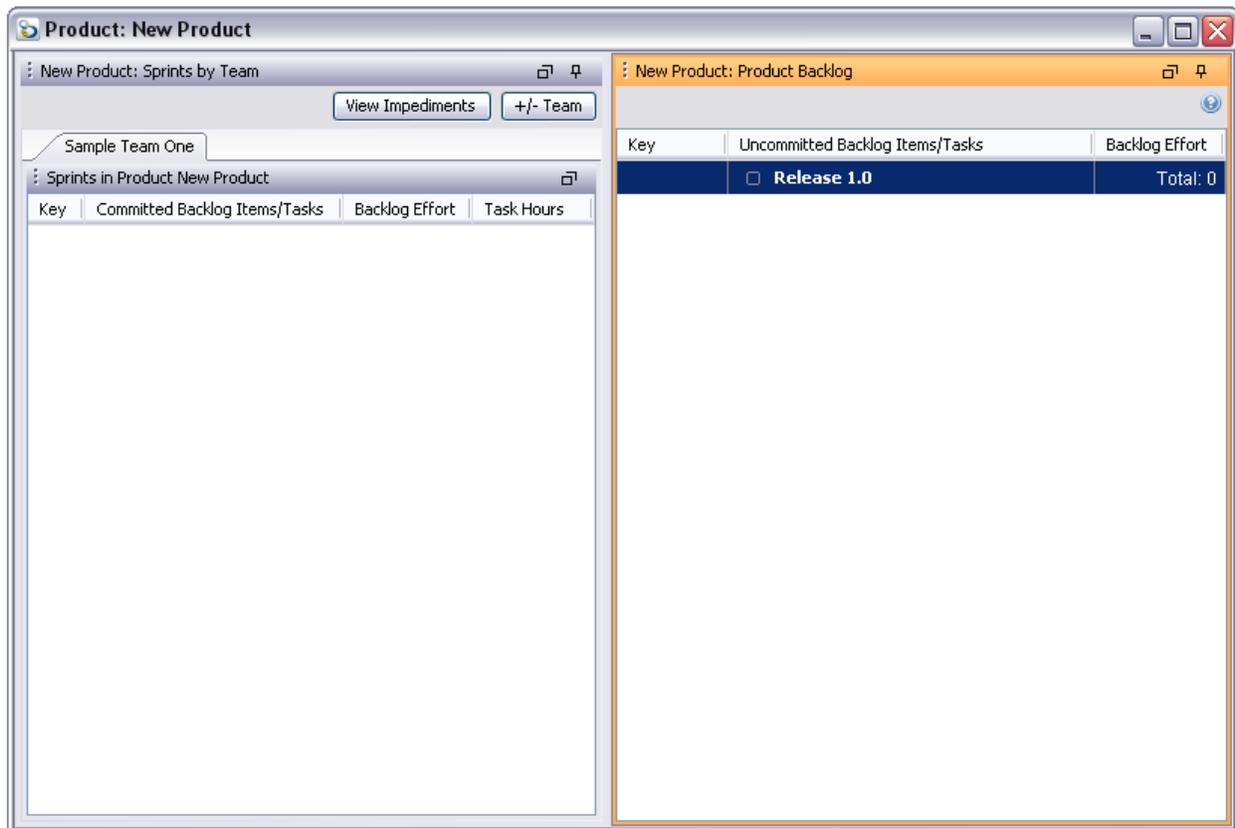
From this point forward, every step required to create a Product, Users, and Team(s) will be fully detailed for you. If you have any questions along the way, you can select the help tab for a full description of every option presented on this step of the wizard:



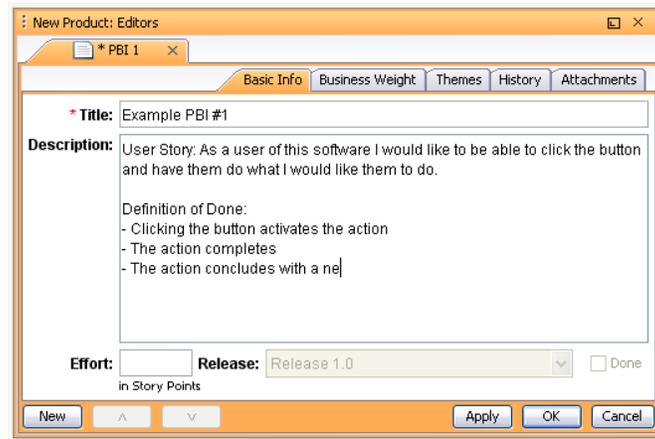
When finished with the Wizard, your new Product will appear. From here you may start to create work for your teams in the form of Product Backlog Items (PBIs).

The Product Window: Creating Work to be Scheduled for your Team(s)

Now that we have a Product, Users, and Team(s) set up, we need to create some Product Backlog Items to schedule within Sprints so that our Team(s) can get to work. Initially, your Product window will look like this:



The column on the right is the Product Backlog and it is where we place work that is not yet scheduled in a Sprint to be completed by a Team. To create a PBI, we can select File > New > Backlog Item. You can also create a new PBI by right-clicking a release and selecting "Add a New Backlog Item to this Release." From the Product Backlog, the shortcut key Ctrl-N will generate a new PBI as well. The PBI Editor window will open:

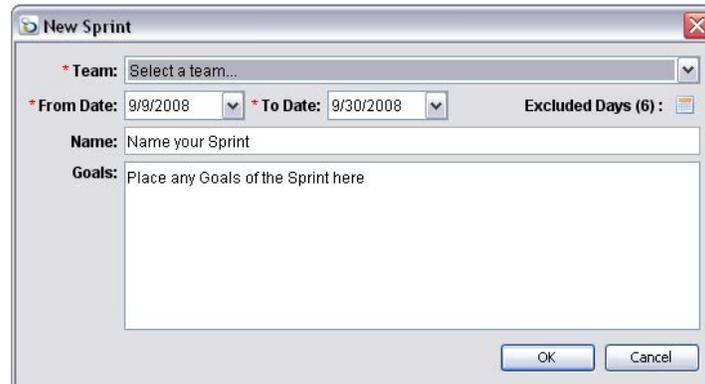


Example of a partially completed PBI

Pressing “Apply” or “OK” will save the PBI and it will be located in your Product Backlog, ready to be scheduled into Releases and Sprints. Note that while you do not need an Effort Estimate to save your PBI, you will need one before the PBI may be scheduled in a Sprint. Once you have completed enough PBIs to begin work, you can move on to the next step, creating a Sprint.

The Product Window: Creating a Sprint for your Team

Creating a Sprint can be accomplished by selecting “File > New > Sprint”, which will open the New Sprint dialog box:



Once you have selected the date range your Sprint will cover and assigned a Team to the Sprint, press OK to create the Sprint in your Backlog. You will find it on the left pane of your Product window, indicated by a red bar:

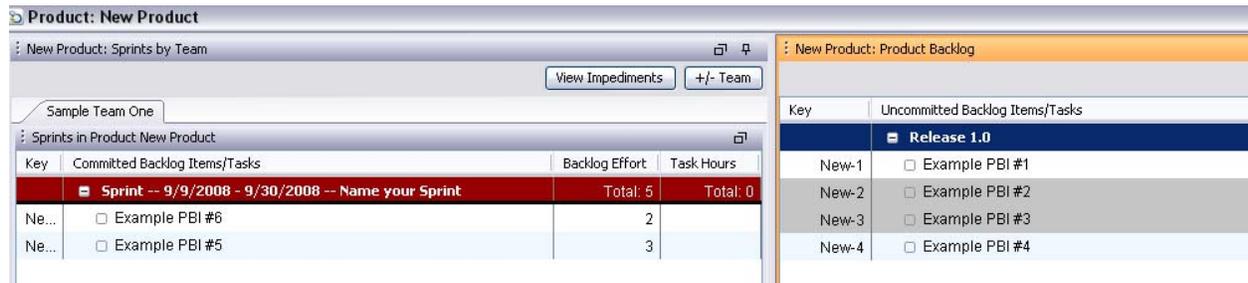


At this point, you are ready for your Team to start scheduling work in your Sprint.

The Product Window: Scheduling a Sprint for your Team

Now that we have a series of PBIs, we can place them into the Sprint for a Team to complete them. Any PBI you wish to schedule in a Sprint will need to have been estimated by the Team. For more information on this process, consult the ScrumWorks® Pro Tutorial: Two-level Estimation System.

To schedule your items in the Sprint, simply select the Product Backlog Item(s) you wish to add to the Sprint, then drag and drop the item(s) to the Sprint on the left pane:

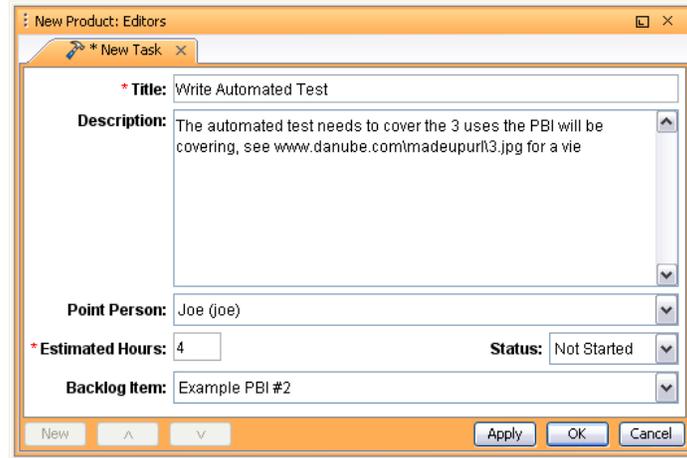


Once your Sprint has been filled with PBIs, your Team will be ready to decompose the selected PBIs into Tasks.

The Product Window: Creating Tasks

While the PBI describes **what** the Product Owner's goals are for the given Sprint, Tasks describe **how** the team intends to complete a given PBI. Tasks are used to break out granular details of what needs to occur to satisfy the definition of done within the PBI. They are primarily internal communication tools for the Team and a way for Team members to keep track of what they need to do on a day-to-day basis to achieve the goals laid out in the PBIs.

To create a new Task, right-click on the PBI you wish to attach the Task to, and select "Add New Task for this Backlog Item," This will open the Task Editor:



Example of a partially completed Task

The Task will need a Title and Hour Estimate before it may be completed. Typically, Tasks can be completed within one to 12 hours. For more information on hour estimate, consult the ScrumWorks® Pro Tutorial: Two-level Estimation System.

If you find you have repetitive Tasks, you may copy and paste Tasks from one PBI to another (even across Sprints) by using either the shortcut keys Ctrl-C (copy) and Ctrl-V (paste), or by using the right-click context menu.

When a Task is created, it is nested under the PBI to which it belongs:

Key	Committed Backlog Items/Tasks	Backlog Effort	Task Hours
	Sprint -- 9/9/2008 - 9/30/2008 -- Name your...	Total: 21	Total: 30
Ne...	Example PBI #2	6	
	Write Automated Test		4
	Document Feature		1
Ne...	Example PBI #3	5	
	Document Feature		1
	Sample Task #1		3
	Manually Test Feature		3
Ne...	Example PBI #6	2	
	Document Feature		1
	Sample Task #1		5

Example of a Sprint

The Web Client: Light-Weight Access to the Data for your Teams

Now that the Sprint is underway, your Team will be working with Tasks on a day-to-day basis. To facilitate this process, Team members may utilize the Web Client or Team Task Board, a

light-weight alternative to the Desktop Client. Accessing the Web Client can be done from the same page where the Desktop Client is accessed. Consult the beginning of this tutorial for access steps.

Once in the Web Client, your team will have a quick and easy way to work with Tasks, Impediments and to view the Sprint Burndown Chart:

The screenshot shows the ScrumWorks Pro Web Client interface. At the top, it says "ScrumWorks Pro Web Client" and "Welcome, joe". Below that, there are navigation links: "Log out | ScrumWorks Pro Home | Help". The ScrumWorks Pro logo is in the top right. A "Taskboard View" section has radio buttons for "All Tasks" (selected) and "My Tasks", and "Today's Date: 9/12/08". Below this, there are dropdowns for "View Product" (Sample Product) and "View Sprint" (8/1/08 - 9/6/08), and a checkbox for "Show Sprints only for Teams to which I belong". The main area is titled "Taskboard: All Tasks" and has a checkbox for "Collapse Backlog Item rows when all Tasks are done" and a "Highlight Tasks" dropdown set to "Joe (joe)". The taskboard is a table with columns for task status: Not Started (7 Tasks), Impeded (8 Tasks), In Progress (14 Tasks), and Done (4 Tasks). Each row represents a Product Backlog Item (PBI) with its title, estimate, and a list of tasks assigned to it. For example, the first PBI is "(Cards-268) PBI Title" with an estimate of 5, and it has tasks like "plus task" (5 hours, assigned to Lisa) and "Some sort of title" (6 hours, assigned to Beth). The second PBI is "(Cards-177) Computer never bluffs ..." with an estimate of 4, and it has tasks like "User Acceptance Tests" (0 hours, unspecified), "Mock up UI" (0 hours, assigned to Bill), "Implement UI" (4 hours, assigned to Joe), and "Automate Integration Test" (0 hours, assigned to Joe). The third PBI is "(Cards-204) Computer does not rais..." with an estimate of 4, and it has tasks like "Mock up UI" (3 hours, assigned to Dave), "Implement UI" (0 hours, assigned to Beth), "User Acceptance Tests" (7 hours, assigned to Beth), and "New Task" (0 hours, assigned to Joe).

Tasks status is reflected by the columns in which they reside. For example, all Tasks currently “In Progress” are situated in the “In Progress” column. To change the status of a task, simply select the desired Task and drag it to the appropriate column.

The End of a Sprint: Marking PBIs as Done

When the Sprint’s scheduled time elapses, the Sprint is considered to be finished and, typically, a Sprint Review meeting follows. During this meeting, the Team demonstrates the working product increment to date and the Product Owner evaluates the progress against the Sprint’s PBIs to determine whether the progress satisfies the respective acceptance criteria. All that fulfill the criteria are marked as “Done” in ScrumWorks Pro, which can be accomplished from within the PBI editor, or by right-clicking the PBI and selecting "Mark Backlog Item as Done." Any PBIs that do not satisfy the Definition of Done are moved back into the Product Backlog to be scheduled in a future Sprint. When marked as done, the PBI title text will fade to a grey color and a green check mark will appear next to it:

Key	Committed Backlog Items/Tasks	Backlog Effort	Task Hours
	Sprint -- 9/9/2008 - 9/30/2008 -- Name your...	Total: 21	Total: 30
Ne...	[-] Example PBI #2 <ul style="list-style-type: none">Write Automated TestDocument Feature	6	4
Ne...	[x] Example PBI #3 <ul style="list-style-type: none">Document FeatureSample Task #1Manually Test Feature	5	3
Ne...	[x] Example PBI #6 <ul style="list-style-type: none">Document FeatureSample Task #1	2	1

Example of a Sprint with 2 finished PBIs

Marking the Item(s) as “Done” is very important for Reporting purposes in ScrumWorks Pro. For more information, please consult the ScrumWorks® Pro Tutorial: Tracking and Reporting Release Progress.