

Microsoft Partner



# **Electronic Addendum**

Proactive PPM with Microsoft Project 2016 for Project Online and Project Server

A best practices guide for project managers

A practical approach to building schedules and managing projects with Microsoft PPM

AUTHOR: Kenneth Steiness CO-AUTHOR: Dale Howard

EDITORS: Steve Caseley and Diedre Emerson CONTRIBUTORS: Chad Olson, Walt Nickel, and Terry Kneeburg

#### Electronic Addendum

Sensei Project Solutions is pleased to provide this electronic addendum to "Proactive PPM with Microsoft Project 2016 for Project Online and Project Server". As Microsoft continues to provide incremental updates and on-going improvements to Microsoft Project and Project Online, Sensei will provide supplementary content updates to the Project Manager's guide in this electronic addendum document.

This addendum will be updated based on changes introduced by Microsoft to Microsoft Project or Project Online that impact developing and maintaining project schedules. As a registered owner of this book, you will be notified by email when updates are issued.

When a specific change impacts several sections of the book, we will simply document the change once. For example, the addition of the agile boards impacts many chapters in this book. We have created a single, although significant update, which covers iterative management across the complete project life cycle.

In other instances, where a change from Microsoft explicitly changes a specific section of the book, we will call out the appropriate section and, in most instances, provide the replacement (or additional) text for impacted areas.

Finally, if you find items which you believe are wrong or out of date, please contact us to bring it to our attention. Email any updates or concerns to us at <u>info@senseiprojectsolutions.com</u>.

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## 1. Addendum Updates 1 – January 2019

# 1.1. Managing Agile Projects

Addendum at a Glance – Microsoft added Sprint Planning and Task Boards to allow you to manage tasks using a visual drag and drop approach similar to techniques defined for agile or iterative planning and management. These new boards and the ability to support iterative management are exciting new additions to Microsoft Project and make it an ideal tool for managing all projects in an organization, independent of the delivery approach. In this addendum we review:

Understanding both agile boards and schedule views Starting an agile project Developing the product backlog Planning a sprint Closing a sprint

As more organizations move towards agile or iterative delivery approaches, having the ability to do visual board management is becoming more important to most organizations. The Backlog boards allow you to manage the project's backlog and schedule stories for completion in a specific sprint and the Sprint boards allow you to manage the status of each story within the current sprint to track the progression of the work within a sprint.

In addition, you can combine the visual boards with traditional Microsoft Project views to easily manage hybrid projects where some work will be managed using predictive or traditional methods while other work will be managed interactively using the visual boards.

## 1.1.1. Microsoft Project Board Functionality

Microsoft has developed three visual boards in support of iterative management that can be accessed from the 'Sprint' ribbon.



Sprints ribbon

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The first board, referred to as the Task board, allows you to manage your work using a Kanban approach where the work can be managed based on defined states or status. This board shows all the iterative tasks in a project and supports continuous flow development where the number of stories in each state can be managed based on the team's capacity.

Not Started SET % COMPLETE	Next up SET % COMPLETE	In progress % COMPLETE: 50	Done % COMPLETE: 100
+ New Task	Plan data migration	Identify duplicate customers	Modernize look and feel of screens $\checkmark$
Confirm performance requirements		Identify user needs	
Validate zipcode			
Develop customer inquiry			

#### Task Board

The remaining boards are used for sprint based iterative development. The Sprint Planning Board allows you to assign a task to a specific sprint. You can allocate the work to sprints for completion based on priority and capacity of the team to complete the work.

+ New Task	Enter Asset Tags	Update Tag to Asset	Update Users	Revalidate Asset Tags	Confirm Tag Location
Delete Asset Tags	Determine Tag Location	Update Asset Tags	Validate Asset Tags		
Delete Users	Assocate Tag to Asset				
Update Tag Location					
Replace Asset Tags					

#### Sprint Planning Board

The final board, the Current Sprint Board, allows you to track the progress of the tasks being worked on within the current sprint. The Current Sprint Board is much the same as the Task Board as it allows you to track the process of the tasks. However, unlike the Task Board which shows all the iterative work in the project, the Current Sprint Board is filtered to show only the work being completed in the current sprint (based on 'Current date').

Sacklog	Next up	In progress	
+ New Task			Validate Asset Tags
Delete Tag to Asset			
Update Users			

#### Current Sprint Board

A new task flag field named 'Show on Board' has also been added, which is used to control whether a task should be visible on these boards. When this flag is set to 'Yes' the task will show on all boards. Understanding how this flag controls the display on the boards is important as it allows you to distinguish between traditional tasks (not set) which should not show on the boards and story tasks (set) which should show on the boards.



## Filtering tasks based on 'Show on board' flag

Microsoft has included additional filtering to exclude summary tasks, completed tasks, and inactivated tasks in the filters used in these boards as well.

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C <u>u</u> t Row	Copy Row Pas	te Row Insert Row	elete Row	
nd/Or	Field Name	Test	Value(s)	^
Show o And Summa And Sprint S And Sprint F	n Board ry tart inish	equals equals is less than or equal to is greater than or equal to	Yes No "Today is:"? "Today is:"?	
] <u>S</u> how related Help	summary rows		Save	ancel

Filter definition for Current Sprint board

## Warning:

You may experience these boards "losing" the filtering based on the 'Show on Board' field, resulting in all tasks in the project showing on the board. If this happens, you can either exit Microsoft Project and relaunch it to reapply the protected filter on these boards, or you can go to the 'View ribbon' and manually apply the appropriate built in filter for the specific board being used.

## 1.1.1.1. Using Board Views

The Task Board and the Current Sprint Board can be configured to contain states or status that align to your organizational processes. To add a new state column to a board, click the 'Add New Column' link and then type the name of the new state into the dialog box. With the new column added, it can be repositioned by right-mouse clicking and selecting 'Move Right/Left' in the shortcut menu. Columns can be renamed, and unneeded columns can also be deleted using the same shortcut menu.

ET % COMPLETE	SET % COMPLETE	% COMPLETE: 50	% COMPLETE: 100	SET % COMPLETE	Rename
+ New Task	Plan data migration	Identify duplicate customers	Modernize look and feel of screens $\checkmark$		✓ Delete ✓ Move Left
Confirm performance requirements		Identify user needs			→ Move Right
Validate zipcode					
Develop customer inquiry	]				

Configure board columns

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You also can set a '% complete' for each column on the board. When a task is moved to the column, the '% complete' for that task is set accordingly. At a minimum, we recommend setting the 'Done' column to reflect 100% complete. This facilitates ease of closing stories during the sprint retrospective.

Identify duplicate customers				
		Modernize look and feel of screens $\checkmark$		
Identify user needs				
	Identify user needs	Identify user needs	Identify user needs	Identify user needs

Set column % complete

## 1.1.1.2. Configuring Cards on Board Views

You can add up to five additional fields (including Enterprise Custom Fields) to your task cards to ensure the most important information is visible on the cards. To configure the cards, from the 'Format ribbon > Customize section' select 'Customize Cards'. Select the information you wish to have displayed on the cards in the 'Customize Task Board Cards' dialog and then click the 'OK' button.

Cards					
Not Started SET % COMPLETE New Task Confirm performance requirem Work-Oh Priority:500	Next up SET % COMPLETE Plan data migration Work:0h Priority:500	In progress % COMPLETE: 50 Identify duplicate customers Work:0h Priority: 500 Identify user needs Work:0h	QA % COMPLETE: 75	Done % COMPLETE: 100 Modernize look and feel of screens Work-0h Priority:500	Add New Column
Validate zipcode Work:0h Priority:500 Develop customer inquiry Work:0h Priority:500		Priority 500		Customize Task Board Cards Base Fields Show Task ID Show Resources Show checkmark when 100% complete Additional Fields Add up to 5 fields to show on the cards. Work	×
				Priority V Select Field V Select Field V Select Field V	

Configure task cards

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#### 1.1.1.3. Using Agile Sheet Views

In addition to these board views, Microsoft has also added two new sheet views specific to iterative management. These new views, known as the 'Sprint Planning Sheet' and 'Current Sprint Sheet' views, use the same filters as the corresponding board, provide the same information, and provide an alternate way to view and maintain the iterative tasks in Microsoft Project.

	Sprint 👻	Name	- Work	Board Status	Resource Names	-	Show on 🚽
49	No Sprint	Replace Asset Tags	Oh	 In progress			Yes
52	No Sprint	Update Tag Location	Oh	Next up			Yes
31	Sprint 1	Enter Asset Tags	Oh	Next up			Yes
32	Sprint 1	Determine Tag Location	Oh	In progress			Yes
33	Sprint 1	Assocate Tag to Asset	Oh	Done			Yes
35	Sprint 2	Update Asset Tags	Oh	Next up			Yes
36	Sprint 2	Update Tag to Asset	Oh	Done			Yes
38	Sprint 3	Validate Asset Tags	Oh	Done			Yes
39	Sprint 3	Update Users	Oh	Backlog			Yes
42	Sprint 4	Revalidate Asset Tags	Oh	Next up			Yes
44	Sprint 5	Confirm Tag Location	Oh	In progress		-	Yes
53	Sprint 8	Define Locations	Oh	Done			Yes
55	Sprint 9	Delete Tag to Asset	Oh	Backlog			Yes
58	Sprint 10	Create Users	Oh	In progress			Yes
59	Sprint 10	Delete Locatons	Oh	Next up			Yes
61	Sprint 11	Print Tag Inventory	Oh	Next up			Yes
62	Sprint 11	Update Locatons	0h	In progress			Yes
	_						

Sprint Planning Sheet view

Sprint -	Name	- Work -	Board Status 👻	Resource Names -
Sprint 3	Validate Asset Tags	0h	Done	
Sprint 3	Update Users	Oh	Backlog	
Sprint 3	Delete Tag to Asset	0h	Backlog	

Current Sprint Sheet view

## 1.1.2. Using the Sensei Agile PPM Add-In

Using the new board and sheet views, Sensei has created the Sensei Agile PPM add-in to Microsoft Project, which adds support for other core iterative development data and principles such as epics, story points, story status, type, and priority. A new ribbon, the Agile Analyzer, has been added to ensure the core functionality required for full iterative management is available on a single ribbon.

File Tas	K Resource	кероп	Project	view	Aglie	Analyzer	Develo	oper	нер Асгов	at lea	im st	orints	Format	7	Tell me what you want to do	
JIRA +				<b>D</b> ,			•	-	Ó,					•	r . 🗶	× /x
	Product Backlog Board	Current Sprint Board	Product Backlog	Current Sprint	Story List	Scrum Gantt Chart	Epics	Other Views	Manage Sprints	New Stories	Accepted	In Progress	Story Point Ready	Sprint Ready	No Story No Story Not Sprint Type Priority Ready	Filter Highlight Clear Clear
lenu Commands	Agile Bo	ards			Agile	Views			Configuration		Story S	Status Mair	itenance		Story Validation	Other Actions

#### Agile Analyzer ribbon

Additional fields have been added with the Sensei Agile PPM add-in to collect additional iterative data typically required for iterative management, including the following:

Epic - A free form text field used for the association of stories to an epic.

Story Points - A numeric field to capture the story point estimate for the story.

Story Priority - A table driven field used to define the business priority of the story.

Story Status – A table driven field used to define the current status of the story.

Story Type – A table driven field used to identify the type of story.

## 1.1.2.1. Agile Boards

The Agile Boards section of the Agile Analyzer ribbon provides access to the two boards focused on sprint based iterative development. The AG31 - Product Backlog Board is based on the 'Sprint Planning Board' with additional configuration for the cards and filters to reflect the full set of data an organization would typically use to manage the project backlog.

o Sprint	Sprint 01		Sprint 02		Sprint 03	Sprint 04	Sprint 05	Sprint 06
+ New Task	Enter Asset Tags Story Points: 16 Story Priority: High Priority Story Type: Business Story	~	Update Tag to Asset Story Points: 16 Story Priority: High Priority Story Type: Documentation Story	~	Update Users Story Points:8 Story Priority:Low Priority Story Type: Team Story	Revalidate Asset Tags Story Points: 32 Story Priority:Low Priority Story Type:Business Story	Confirm Tag Location Story Points 4 Story Priority: High Priority Story Type: Implementation Story	Delete Users Story Points: 0 Story Priority: Medium Priority Story Type: Business Story
	Determine Tag Location Story Points 8 Story Priority: Medium Priority Story Type: Team Story	*	Update Asset Tags Story Points: 32 Story Priority: Medium Priority Story Type: Technology Debt	*	Validate Asset Tags Story Points: 16 Story Priority: High Priority Story Type: Technology Debt			Delete Asset Tags Story Points: 0 Story Priority: High Priority Story Type: Business Story
	Assocate Tag to Asset Story Points: 16 Story Priority: High Priority Story Type: Risk Story	~						



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The AG32 – Current Sprint Board is based on the 'Current Sprint Board' with additional configuration for the cards and filters to reflect the full set of data an organization would typically use to manage the stories within the current sprint. The stories in the current sprint are "calculated" by the system and reflects all iterative tasks where the 'Current date' aligns with the 'Sprint Start Date' and the 'Sprint Finish Date'.

Backlog ET % COMPLETE	Next up SET % COMPLETE	In progress SET % COMPLETE	Done SET % COMPLETE
+ New Task Delete Tag to Asset Story Points:0 Story Priority:Low Priority Story Type: Business Story			Validate Asset Tags Story Points: 16 Story Priority:High Priority Story Type: Technology Debt
Update Users Story Points:8 Story Priority:Low Priority Story Type: Team Story			

## AG32 – Current Sprint Board

#### 1.1.2.2. Agile Views

The agile views use a traditional task sheet and are designed to provide support for additional iterative management approaches not available in the board views. The AG31 – Product Backlog sheet view allows you to view and maintain a broader set of information than the AG31 – Product Backlog Board. In this view, in addition to scheduling an iterative task into a specific sprint, you can also maintain Story Type, Story Priority, Story Status and Story Points. As this view sums the Story Points by Sprint, you can also maintain and validate that the total story point count for a sprint is consistent with the team's capacity or velocity. In addition, by setting the Epic field, you can associate an individual iterative task with an Epic.

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Name	👻 Sprint	👻 on	+ Epic	- Story Type -	Story Priority	👻 Status 👻 Poir
Sprint: Sprint 01	Sprint 01	Yes				40
Enter Asset Tags	Sprint 01	Yes		Business Story	High Priority	Sprint Rea 16
Determine Tag Location	Sprint 01	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete 8
Assocate Tag to Asset	Sprint 01	Yes		Risk Story	High Priority	Sprint Rea 16
Sprint: Sprint 02	Sprint 02	Yes				48
Update Asset Tags	Sprint 02	Yes		Technology Debt	Medium Priority	Sprint Rea 32
Update Tag to Asset	Sprint 02	Yes		Documentation Story	High Priority	Story Poin 16
Sprint: Sprint 03	Sprint 03	Yes				24
Validate Asset Tags	Sprint 03	Yes		Technology Debt	High Priority	In Progres 16
Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progres 8
Sprint: Sprint 04	Sprint 04	Yes				32
Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted 32
Sprint: Sprint 05	Sprint 05	Yes				4
Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progres 4
Sprint: Sprint 06	Sprint 06	Yes				0
Delete Asset Tags	Sprint 06	Yes		Business Story	High Priority	Accepted 0
Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progres 0
Sprint: Sprint 07	Sprint 07	Yes				0
Replace Asset Tags	Sprint 07	Yes		Risk Story	Low Priority	In Progres 0
Sprint: Sprint 08	Sprint 08	Yes				0
Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted 0
Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted 0
Sprint: Sprint 09	Sprint 09	Yes				0
Delete Tag to Asset	Sprint 09	Yes		Business Story	Low Priority	Accepted 0
Sprint: Sprint 10	Sprint 10	Yes				0
Create Users	Sprint 10	Yes		Risk Story	Medium Priority	0
Delete Locatons	Sprint 10	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted 0
Sprint: Sprint 11	Sprint 11	Yes				0
Print Tag Inventory	Sprint 11	Yes		Documentation Story	Medium Priority	New 0
Update Locations	Sprint 11	Yes	Manage Inventory Locations	Team Story	High Priority	New 0

#### AG31 - Product Backlog sheet view

The AG32 – Current Sprint sheet view, much like the AG31 Product Backlog sheet view, allows you to view and maintain a broader set of information than the AG32 – Current Sprint Board. In this view, in addition to maintaining the 'Board Status', you can also view Story Type, Story Priority, Story Status and Story Points. Additionally, this view allows you to view or maintain any task status updates, specifically the 'Work', 'Actual Work' and 'Remaining Work'. Maintaining these work data items is optional based on whether your organization wishes to maintain this level of detail for iterative projects.

If your organization wishes to maintain these work data items using either the PWA timesheet/task functionality or by directly maintaining these fields in Microsoft Project, the agile functionality is fully integrated ensuring that all projects, independent of delivery approach, can report consistent data across the organization. If, on the other hand, your organization chooses a more agile approach to tracking progress, these fields can be hidden, and you can simply record each iterative task as not-done or done (100% complete) as part of each sprint's review and retrospective.

lame	<ul> <li>Board Status</li> </ul>	- Epic	<ul> <li>Story Type</li> </ul>	Ψ	Story Status	<ul> <li>Story Points</li> </ul>	- Work	<ul> <li>Actual Work</li> </ul>	✓ Remain	ing Work +
Board Status: Backlog	Backlog						8	Oh	Oh	0h
Update Users	Backlog		Team Story	In P	rogress		8	Oh	Oh	Oh
Delete Tag to Asset	Backlog		Business Story	Acc	epted		0	Oh	Oh	Oh
Board Status: Done	Done						16	0h	Oh	Oh
Validate Asset Tags	Done		Technology Debt	In P	rogress		16	Oh	Oh	Oh

AG32 – Current Sprint sheet view

The AG33 – Story List view provides a "flat" list of all the iterative tasks in a project, with the ability to manipulate any of the iterative management fields, including Sprint, Epic, Board Status, Story Type, Story Status, Story Priority and Story Points.

Enter Asset Tags	Sprint 01		Next up	Business Story	Sprint Ready	High Priority 16
Determine Tag Location	Sprint 01	Manage Inventory Locations	In progress	Team Story	Complete	Medium Priority 8
Assocate Tag to Asset	Sprint 01		Done	Risk Story	Sprint Ready	High Priority 16
Update Asset Tags	Sprint 02		Next up	Technology Debt	Sprint Ready	Medium Priority 32
Update Tag to Asset	Sprint 02		Done	Documentation Story	Story Point Ready	High Priority 16
Validate Asset Tags	Sprint 03		Done	Technology Debt	In Progress	High Priority 16
Update Users	Sprint 03		Backlog	Team Story	In Progress	Low Priority 8
Revalidate Asset Tags	Sprint 04		Next up	Business Story	Accepted	Low Priority 32
Confirm Tag Location	Sprint 05	Manage Inventory Locations	In progress	Implementation Story	In Progress	High Priority 4
Delete Asset Tags	Sprint 06		In progress	Business Story	Accepted	High Priority 0
Delete Users	Sprint 06		In progress	Business Story	In Progress	Medium Priority 0
Replace Asset Tags	Sprint 07		In progress	Risk Story	In Progress	Low Priority 0
Update Tag Location	Sprint 08	Manage Inventory Locations	Next up	Implementation Story	Accepted	High Priority 0
Define Locations	Sprint 08	Manage Inventory Locations	Done	Business Story	Accepted	Medium Priority 0
Delete Tag to Asset	Sprint 09		Backlog	Business Story	Accepted	Low Priority 0
Create Users	Sprint 10		In progress	Risk Story		Medium Priority 0
Delete Locatons	Sprint 10	Manage Inventory Locations	Next up	Risk Story	Accepted	High Priority 0
Print Tag Inventory	Sprint 11		Next up	Documentation Story	New	Medium Priority 0
Update Locations	Sprint 11	Manage Inventory Locations	In progress	Team Story	New	High Priority 0

## AG33 – Story List sheet

The AG34 – Scrum Gantt Chart view is a hybrid view which shows all the non-iterative tasks ('Show on Board' = No) as well as all the iterative tasks that have a 'Sprint Start Date' earlier than 'Current date'. This allows you to view any traditional tasks, perhaps for up-front planning or for back-end implementation, that don't fit into a sprint model as well as all iterative tasks completed in earlier sprints and in the current sprint. We describe this as the committed iterative work on the project. The iterative tasks for future sprints are not included in this view as they are not committed and based on agile principles, may never be completed during the life of the project.

ask Name	<ul> <li>Show on Boa</li> </ul>	ard w Work	<ul> <li>Actual Work</li> </ul>	* Work	· Duration		<ul> <li>Actual Start</li> </ul>	• Finish	· Predecessors · T	F S S M T W T F
Electronic Asset Tracking Updat	e No	168h	168h	Oh	194d	Jun 5 '18	Jun 5 '18	Mar 10 '19		
Develop Product Vision	No	40h	40h	Oh	2.5d	Jun 5 '18	Jun 5 '18	Jun 7 '18		Product Owner,SCRUM Master
Review and Approve Product V	is No	2h	2h	Oh	0.5d	Jun 7 '18	Jun 7 '18	Jun 7 '18	2	Product Owner[50%]
Publish Product Vision	No	2h	2h	Oh	2d	Jun 8 '18	Jun 8 '18	Jun 11 '18	3	SCRUM Master[13%]
Establish Release Strategy and I	Di No	16h	16h	Oh	1d	Jun 12 '18	Jun 12 '18	Jun 12 '18	4	Troduct Owner,SCRUM Master
Develop Release/Story Map	No	2h	2h	Oh	0.17d	Jun 13 '18	Jun 13 '18	Jun 13 '18	5	Product Owner[50%],SCRUM Master
Product Vision/Discovery Session	(No	Oh	Oh	Oh	bo	Jun 13 '18	Jun 13 '18	Jun 13 '18	6	6/13
Establish Project Norms	No	16h	16h	Oh	2d	Jun 13 '18	Jun 13 '18	Jun 15 '18	7	SCRUM Master,Kenneth Steiness
Determine Initial Sprint Veloc	it No	8h	8h	Oh	1.25d	Jun 15 '18	Jun 15 '18	Jun 18 '18	10	SCRUM Master[80%],Kenneth Steiness[80%]
Project Operating Parameters C	o No	Oh	Oh	Oh	Od	Jun 18 '18	Jun 18 '18	Jun 18 '18	11	<b>⊸</b> 6/18
Project Environment	No	56h	56h	Oh	7.5d	Jun 18 '18	Jun 18 '18	Jun 27 '18		
Develop Preliminary Project T	e No	24h	24h	Oh	1.5d	Jun 18 '18	Jun 18 '18	Jun 19 '18	12	Agile Team Member, SCRUM Master, Kenneth Steiness
Select Agile Development Stra	t No	8h	8h	Oh	0.5d	Jun 19 '18	Jun 19 '18	Jun 20 '18	14	Product Owner, SCRUM Master, Kenneth Steiness
Define Team Space (Caves and	No	8h	8h	Oh	0.5d	Jun 20 '18	Jun 20 '18	Jun 20 '18	15	Agile Team Member, SCRUM Master, Kenneth Steiness
External Milestone - Team Spa	ic No	Oh	Oh	Oh	Od	Jun 27 '18	Jun 27 '18	Jun 27 '18	16FS+1w	🍾 6/27
Implement Build Server	No	16h	16h	Oh	2d	Jun 20 '18	Jun 20 '18	Jun 22 '18	16	Agile Team Member
Project Environment Complete	No	Oh	Oh	Oh	Omo	Jun 22 '18	Jun 22 '18	Jun 22 '18	18	÷ 6/22
Sprint Zero Complete	No	Oh	Oh	Oh	Omo	Jun 22 '18	Jun 22 '18	Jun 22 '18	19	
Confirm Release Horizon	No	4h	4h	Oh	2h	Jun 22 '18	Jun 22 '18	Jun 25 '18	20	Product Owner, SCRUM Master
Develop Release Strategy	No	2h	2h	Oh	1h	Jun 25 '18	Jun 25 '18	Jun 25 '18	23	Product Owner,SCRUM Master
Create Release Vision	No	4h	4h	Oh	1.33h	Jun 25 '18	Jun 25 '18	Jun 25 '18	24	SCRUM Master, Agile Team Member, Product Owner
Identify Story Focus for Relea	se No	4h	4h	Oh	1.33h	Jun 25 '18	Jun 25 '18	Jun 25 '18	25	Agile Team Member, Product Owner, SCRUM Master
Develop Sprint Strategies	No	12h	12h	Oh	4h	Jun 25 '18	Jun 25 '18	Jun 26 '18	26	🚈 Agile Team Member, Product Owner, SCRUM Mast
Release Plan X Complete	No	Oh	Oh	Oh	Omo	Jun 26 '18	Jun 26 '18	Jun 26 '18	27	÷ 6/26
+Sprint 1	Yes	Oh	Oh	Oh	29d	Jul 2 '18	Jul 2 '18	Aug 10 '18		
Enter Asset Tags	Yes	Oh	Oh	Oh	29d	Jul 2 '18	Jul 2 '18	Aug 10 '18		
Determine Tag Location	Yes	Oh	Oh	Oh	29d	Jul 2 '18	Jul 2 '18	Aug 10 '18		
Assocate Tag to Asset	Yes	Oh	Oh	Oh	29d	Jul 2 '18	Jul 2 '18	Aug 10 '18		
#Sprint 2	Yes	Oh	Oh	Oh	29d	Aug 13 '18	Aug 13 '18	Sep 21 '18		
Update Asset Tags	Yes	Oh	Oh	Oh	29d	Aug 13 '18	Aug 13 '18	Sep 21 '18		
Update Tag to Asset	Yes	Oh	Oh	Oh	29d	Aug 13 '18	Aug 13 '18	Sep 21 '18		
4 Sprint 3	Yes	Oh	Oh	Oh	30d	Sep 24 '18	NA	Nov 4 '18		
Validate Asset Tags	Yes	Oh	Oh	Oh	30d	Sep 24 '18	NA	Nov 4 '18		
Update Users	Yes	Oh	Oh	Oh	30d	Sep 24 '18	NA	Nov 4 '18		

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The final view, the AG35 – Epic view, is intended for "viewing purposes only" and allows you to view what stories are associated with specific epics. While you can change any of the data visible on this view, we recommend using either the Product Backlog or Story List views for maintaining the data associated with iterative tasks as opposed to doing it in this view since it does not reflect the sprint status of these stories.

Vame	on snow	- Story Type	Story Priority	→ Story Status	👻 Story Points 👻
Epic: Manage Inventory Locations	Yes				12
Determine Tag Location	Yes	Team Story	Medium Priority	Complete	٤
Confirm Tag Location	Yes	Implementation Stor	y High Priority	In Progress	2
Update Tag Location	Yes	Implementation Stor	y High Priority	Accepted	0
Define Locations	Yes	<b>Business Story</b>	Medium Priority	Accepted	C
Delete Locatons	Yes	Risk Story	High Priority	Accepted	0
Update Locations	Yes	Team Story	High Priority	New	(

#### AG34 – Epics

## 1.1.2.3. Story Status Maintenance

The Story Status Maintenance section of the ribbon is intended for the Product Owner or Scrum Master to support "story grooming" ensuring that the backlog is well managed and there are always stories ready for the next sprint.

As shown below, the "In Progress" button was selected, and it highlights in yellow using cell background formatting all the stories which are "In Progress". Knowing what stories are under development by the subject matter experts, for example, being classified by type or priority, story card or definition of done, would be useful prior to a sprint planning session. This would allow the Product Owner to be able to find stories that should be "hurried up" to allow them to be candidates for the next sprint.

Electronic Addendum

JIR	A * 8	Product acklog Board	Current Sprint Board	Product C Backlog	O, urrent Sprint	Story List	Scrum Santt Chart	• Epics	Other Views	Mar	) age ints	New	Accept	tec In Progre	Story Re	/ Point ady	♦ Sprint Ready	No Story I Type	No Story Ne Priority	ot Sprint Ready	Filter Clear	Highlig	nt	
nu Com	mands	Agile I	Boards			Agile	Views			Config	uration		Sto	ry Status M	aintenan	ce		Sto	ry Validation		Other	Actions		
	eint Carle	1.01																						-
							0203			Show							-		1 200			Story	Story	
	Name	Cardina 01			*	Curint	Spri	nt		- on		tpic				* Stor	утуре	,	Story	Priority	<b>v</b> . 3	status	Points	
	sprint	: Sprint 01				Sprint	01			Yes						Durali	e e e e Che		Link Drie	alter.		aniat De	40	
31	Dete	r Asset Tag	5 Lesstine			Sprint	31			Ves			Inconsta	and a set		Tues	ness sto	ry .	Madium	Delevitor	2	print re	016	
32	Acco	coto Tog to	Arrot			Sprint	01			Vor	0	wanage	mvento	ny Locati	0/15	Dick	Stony		High Drig	ritu		oriet Pr	- 16	
5.5	ASSO	Cate Tag to	Maser			Sprint	12			Ver						RISK	Story		right Prid	ancy	3	print Re	49	
	Unde	to Accet T	3.00			Sprint	02			Vor						Tech	nology	Dobt	Madium	Driority		oriot Re	- 22	
35	Unda	ate Tag to	ags			Sprint	32			Ves						Deci	mology	lon Stone	High Drig	ritu		ton De	0.16	
30	4 Consist	Corint 02	45501			Sprint	02			Ver						DOCI	imentat	ion story	riigh Pho	πιγ	3	LOTY PO	74	
20	Valid	ate Accet 1	3.05			Sprint	13			Ves						Tech	nology	Deht	High Price	ritu	h	Progra	16	
30	Unde	ate licere	uga			Sprint	12			Ver						Tear	n Stoni	Jebr	Low Drio	ritu	-	Brogre		
39	4 Corint	Seriet 04				Sprint	04			Ver						Tean	II SLOTY		LOW FIIO	inty		rrogre	37	
52	Reva	lidate Asse	t Tags			Sprint	04			Yes						Rusi	ness Sto	DV.	Low Prio	rity	4	ccenter	32	
10.	4 Sprint	- Sprint 05				Sprint	5			Vee						bush	1033 510	1	contrito		- 1	ecopres		
	Conf	irm Tag Lo	ation			Sprint	05			Yes		Manage	Invento	ny Locati	0.05	Impl	ementat	tion Story	High Price	rity	1	Progre	× 4	
	ASprint	Sprint 06				Sprint	06			Vet				.,									0	
56	Delet	te Asset Ta	<b>95</b>			Sprint	06			Yes						Busi	ness Sto	rv.	High Price	rity	4	ccenter	10	
57	Dele	te Users	D			Sprint	06			Yes						Busi	ness Sto	rv	Medium	Priority	-	n Progre	5.0	
	- Sprint	: Sprint 07				Sprint	07			Yes													0	
59	Repla	ace Asset T	ags			Sprint I	07			Yes						Risk	Story		Low Prio	rity	1r	n Progre	s 0	
	- Sprint	: Sprint 08	NGA.			Sprint	08			Yes										alles -		1.1.1.1.1.1.1.1	0	
62	Upda	ate Tag Loc	ation			Sprint	08			Yes	1	Manage	Invento	ry Locati	ons	Impl	emental	tion Story	High Prio	rity		ccepted	0	
63	Defir	ne Location	s			Sprint	08			Yes	1	Manage	Invento	ry Locati	ons	Busi	ness Sto	ry ,	Medium	Priority		ccepted	0	
	- Sprint	: Sprint 09				Sprint	09			Yes													0	
65	Dele	te Tag to A	sset			Sprint	09			Yes						Busi	ness Sto	ry	Low Prio	rity	P	ccepted	0	
	- Sprint	: Sprint 10				Sprint :	10			Yes													0	
68	Creat	te Users				Sprint	10			Yes						Risk	Story		Medium	Priority			0	
69	Delet	te Locaton:	5			Sprint :	10			Yes	1	Manage	Invento	ry Locati	ons	Risk	Story		High Prio	rity	p	ccepted	0	
	- Sprint	: Sprint 11				Sprint :	11			Yes		100							1.000				0	
71	Print	Tag Invent	tory			Sprint	11			Yes						Docu	umentat	ion Story	Medium	Priority	N	lew	0	
72	Upda	ate Locatio	ns			Sprint :	11			Yes	1	Manage	Invento	ry Locati	ons	Tean	n Story		High Prio	rity	N	lew	0	

## In Progress button

The buttons in this section align to the agile story life cycle:

- New Stories highlights all stories where the 'Story Status' is either blank or equal to 'New' and would be used to review and validate that the new stories are appropriate and should be included in the project.
- Accepted highlights all stories where the 'Story Status' is "Accepted" and would be used to review stories as candidates for completion of the story card details.
- In Progress highlights all stories where the 'Story Status' is "In Progress" and would be used to review all the stories where the story card is in progress, but not yet ready to be a candidate for sprint planning.
- Story Point Ready highlights all stories where the 'Story Status' is "Story Point Ready" and would be used to identify all stories which have a complete story card and are candidates for story point estimating.
- Sprint Ready highlights all stories where the 'Story Status' is "Sprint Ready" and would be used to identify all stories which have both a complete story card and story point estimates and are candidates for sprint planning.

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Agile story life cycle

## 1.1.2.4. Story Validation

The Story Validation section of the ribbon contains three buttons for governance validations to ensure that all iterative tasks have the minimal data required to meet organizational standards. In the figure shown below, the No Story Type is clicked, which highlights several tasks missing a Story Type value. The other two buttons provide validations that confirm that the Story Priority is set and that all tasks which are defined as Sprint Ready are not missing any key data items.

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		Demoluted C	100	Deschuet Courset	Dans Comm	fairs Othe		New Assessed in Phase Pairs	A Contrat Min Chan Min Chan		Makinha	
		Backlog Board Spr	int Board	Backlog Sprint	List Gantt Chart	Views	<ul> <li>Sprints</li> </ul>	Stories Progress Ready	Ready Type Priority	Ready Clear	Clear	
nu Cos	mands	Anile Board			Anile Views		Configuration	Shriv Satus Maintenance	Story Valid	lation Other	Actions	
-		right bound			- Andrew County		comparation	100,9 50000 100000000				
<u></u>												
							Show					Story
	0	Name	-		*	Sprint	- on	- Epic	- Story Type -	Story Priority	<ul> <li>Story Status</li> </ul>	- Points
		- Sprint: Sprint 0	1		Sprint 01		Yes			and a second		40
31	×,	Enter Asset T	ags		Sprint 01		Yes		Business Story	High Priority	Sprint Ready	16
32	ž	Determine Ta	ig Location	n	Sprint 01		Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete	8
33	~	Assocate Tag	to Asset		Sprint 01		Yes		Risk Story	High Priority	Sprint Ready	16
36	1	- Sprint: Sprint U	Tage		Sprint 02		Yes		Technology Dobt	Madium Delasitu	Engint Roady	48
26	1	Update Asset	Accest		Sprint 02		Yes		Technology Debt	High Dringity	Stens Deint Pear	32
30		4 Sprint: Sprint 0	I ASSEL		Sprint 03		Ves			High Photicy	Story Point Read	74
38	308	Validate Asse	t Tags		Sprint 03		Yes		Technology Debt	High Priority	In Progress	16
39	THE	Undate Users	1.1002		Sprint 03		Ves		Team Stony	Low Priority	In Progress	8
		+ Sprint: Sprint 0	4		Sprint 04		Yes		reamonary	contributy	in the press	32
42		Revalidate As	set Tags		Sprint 04		Yes		Business Story	Low Priority	Accepted	32
		- Sprint: Sprint 0	15		Sprint 05		Yes					4
44	110	Confirm Tag I	ocation		Sprint 05		Yes	Manage Inventory Locations			In Progress	4
		- Sprint: Sprint 0	6		Sprint 06		Yes					0
46	210	Delete Asset	Tags		Sprint 06		Yes		Business Story	High Priority	Accepted	0
47	38	Delete Users			Sprint 06		Yes		Business Story	Medium Priority	In Progress	0
		- Sprint: Sprint 0	17		Sprint 07		Yes					0
49	318	Replace Asset	t Tags		Sprint 07		Yes		Risk Story	Low Priority	In Progress	0
		* Sprint: Sprint 0	18		Sprint 08		Yes					0
52	38	Update Tag L	ocation		Sprint 08		Yes	Manage Inventory Locations	Implementation Story	1	Accepted	0
53	10	Define Locati	ons		Sprint 08		Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted	0
		- Sprint: Sprint 0	19		Sprint 09		Yes					0
55	38	Delete Tag to	Asset		Sprint 09		Yes		Business Story	Low Priority	Accepted	0
	-	Sprint: Sprint 1	.0		Sprint 10		Yes					0
58	28	Create Users			Sprint 10		Yes		Risk Story	Medium Priority		0
59	30	Delete Locato	ons		Sprint 10		Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted	0
	-	- Sprint: Sprint 1	1		Sprint 11		Yes					0
61	38	Print Tag Inve	entory		Sprint 11		Yes		Documentation Story	Medium Priority	New	0
62	28	Update Locat	ions		Sprint 11		Yes	Manage Inventory Locations	Team Story	High Priority	New	0

No Story Type validation button

## 1.1.3. Starting an Agile Project

All projects should be started using an approved organizational project type. Therefore, assuming you are using Project Online, you should always start each new agile project on the 'Create a New Proposal' page in 'PWA' by selecting the appropriate Enterprise Project Type. This will ensure that the appropriate workflow, project detail pages, and templates are applied to your project.



Create new agile project

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This will create a new project in Project Online following your organizational standards. If you are using Microsoft Project standalone, select an appropriate template from the 'Backstage > New page'.

#### 1.1.3.1. Setting Agile Sprints

With the project created in PWA, we now open it in Microsoft Project desktop to complete the core planning activities. As with any project, the first step is to define the project in the 'Project Information' dialog, specifically the 'Start date', 'Schedule from' and 'Calendar' fields.

(art <u>d</u> ate:	Jun 5 '18	~	Current date:	Oct 25 '18			
inish date:	Mar 10 '19		Status date:	Sep 23 '18		•	
chedule from:	Project Start Date	~	Calendar:	Standard			
A alculate Resou	Il tasks begin as soon as pos urce Utilization from:	sible.	Priority:	500			
Project Plan		~ NA					
nterprise Cust	om Fields						
Department:	Engineering	~					
Custom	Field Name	Value			-		
Adminis	trative	No					
Benefits		\$0.00					
Cost KPI		No Ba	seline				
Investme	ent Category	Grow					
Location	1	St Lou	iis, MO				
Program	1	Palma	L.				
Project H	KPI	On Tr	ack				
Project I	Phase	02 - P	lanning				
	l Costs	\$0.00					
Proposa							

Set Project level fields

Next, from the 'Project ribbon > Properties section', click the 'Manage Sprints' button and define the Sprint details in the 'Manage Sprints' dialog. First set the 'Duration', then set the 'Sprint Start' date if it is different than the project 'Start date'. Click the 'Add Sprint' button in the dialog to create as many sprints as you believe the project will require.

You can rename the sprints in this dialog to make them more descriptive. Click the 'OK' button when finished.

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	Tasi	k Resi	eurce Report Project View A L-ins Project Custom Manage (in Information Fields Sprints	gile Analyzer	Developer BS Change Working T	Help Acrob	at Team	Sprints Format Status Date: 9/2: Update Project t	Spelling	at you v
Insert		Add-in	s Prop	erties		s	chedule	Status	Proofing	
~										
	0	Task	Technical	Manage Sprints						×
0	-	MIDC -	Task Name	Name			Length	Start	Finish	0
	-		- Electronic Asset Tracking Opdate	No Sprint			0d	NA	NA	
1	Y.,	-	A Product Vision/Discovery Session	Sprint 01			6W	Jul 2 '18	Aug 12 '18	
2	Y .	-	Develop Product Vision	Sprint 02			6W	Aug 13 '18	Sep 23 '18	
3	×.	-	Review and Approve Product Visi	Sprint 03			6W	Sep 24 '18	Nov 4 '18	
4	~	-5	Publish Product Vision	Sprint 04			6W	NOV 5 18	Dec 16 18	
5	~	-5	Establish Release Strategy and Du	Sprint 06			6w	Jan 28 '19	Mar 10 '19	
6	4	-5	Develop Release/Story Map	Sprint 07			6W	Jun 27 '18	Aug 7 '18	
7	~	5	Product Vision/Discovery Session Co	Sprint 08			6w	Aug 8 '18	Sep 18 '18	
8		-5	- Sprint Zero	Sprint 09			6w	Sep 19 '18	Oct 30 '18	
9		-5	Project Operating Parameters	Sprint 10			6W	Oct 31 '18	Dec 11 '18	
10			Establish Project Norms	Sprint 11			6w	Dec 12 '18	Jan 22 '19	
11		-5	Determine Initial Sprint Velocity							
12	1	-	Project Operating Parameters Cont				1			
13		-	Project Environment	Add Sprint						
14		-	Develop Preliminary Project Tec	Sprint Start:	Jan 23 '19	~				
15			Select Agile Development Strate		2					
16	-	-	Define Team Space (Cause and (	Duration:	2w					
10	1	-	Denne ream Space (Caves and C	Add Sprint						
10	~	-	External Milestone - ream Space	rad spillit						
18	~	-	Implement Build Server	-			1			
19	Y	-	Project Environment Complete						OK Can	cel
	1	100	Sprint Zoro Complete							-

Manage Sprints dialog

## Caution:

## The project calendar is not used when creating sprints. Sprints are always created based on a fixed duration independent of the number of working days in the period.

Tips and Hints:

If your organization adjusts the sprint dates to accommodate statutory holidays and other non-working time, only create as many sprints needed to take you to the first sprint that contains non-working time. Adjust the Start/Finish dates and then continue to create sprints until the next non-working time period.

#### Tips and Hints:

If you rename your sprints, we recommend prefixing the sprint number at the beginning to ensure that any views which you sort/group by sprint name will remain in chronological order. For example, "01 - Identify Customer, 02 - Capture Order Details".

## 1.1.3.2. Using Resource Engagements on an Agile Project

Because agile projects are planned iteratively, most organizations will use Resource Engagements with named resources to ensure the team is committed to the project at the appropriate allocation, independent of iterative task assignments. Resource engagements for iterative projects are created using the same process as predictive projects. See Section 4.10 Creating Resource Engagements for Named Resources in this book for more details.

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Resource engagements for named resources should be created for each team member on the iterative project and should cover the duration of the project to ensure that the capacity demand of each team member reflects the unplanned work for future sprints. Once the resource engagements have been submitted, you need to ensure that 'Calculate Resource Utilization from' value is set to 'Resource Engagements'. From the 'Project ribbon > Properties section' click the 'Project Information' button. In the Project Information dialog, ensure that the 'Calculate Resource Utilization from' value is set to 'Resource for the team' value is set to 'Resource Utilization from' value is set to 'Resource Engagements', and then click the 'OK' button.

	Jun 5 '18	<ul> <li>Current date:</li> </ul>	Oct 25 '18	~	
hish date:	Mar 10 '19	Status date:	Sep 23 '18	×	
heduje from:	Project Start Date	<ul> <li>Calendar:</li> </ul>	Standard	~	
A	Il tasks begin as soon as possible.	Priority:	500		
Iculate Resou	irce Utilization from:		A BADOR C		
Resource En	gagements V NA				
ternrise Cust	om Fields				
Dependence of	un reius	18			
Department	Engineering	×			
Custom	Field Name	Value		^	
Administ	trative	No			
Benefits	ii	\$0.00			
Cost KPI		No Baseline			
	ent Category	Grow			
Investme					
Investme Location		St Louis, MO			
Location Program	1	St Louis, MO Palma		- 18	
Investme Location Program Project K	и (РІ	St Louis, MO Palma On Track		- 11	
Investme Location Program Project K Project F	(P) Phase	St Louis, MO Palma On Track 02 - Planning		- 1	

Ensure Resource Engagements is selected

## 1.1.4. Developing the Product Backlog

Maintaining the product backlog can be as simple as dragging and dropping stories into the appropriate sprint column using the AG31 – Product Backlog Board. This will schedule the story for work in that sprint.

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+ New Task Update Locations	Enter Asset Tags Story Points: 16 Story Priority: High Priority Story Type Business Story	*	Update Tag to Asset Story Points: 16 Story Priority: High Priority Story Type: Documentation Story	*	Update Users Story Points:8 Story Priority:Low Priority Story Type: Team Story	
Story Points:0 Story Priority:High Priority Story Type:Team Story Delete Locatons	Determine Tag Location Story Points: 8 Story Priority: Medium Priority Story Tune Team Story	~	Update Asset Tags Story Priority: Medium Priority Story Priority: Medium Priority	*	Validate Asset Tags Story Points: 16 Story Priority: High Priority	1
Story Points:0 Story Priority:High Priority Story Type:Risk Story	Assocate Tag to Asset	~			, , , , , , , , , , , , , , , , , , ,	
Create Users Story Points:0 Story Priority: Medium Priority Story Type:Risk Story	Story Priority: High Priority Story Type: Risk Story					
Print Tag Inventory Story Points:0 Story Priority: Medium Priority Story Type: Documentation Story						
Delete Tag to Story 0 Story Priority:Low Prio Story Business	rity					L
		-				

Drag and drop stories to manage the product backlog

If you need to maintain additional detail on the stories, such as Story Priority, Story Type or Story Points, the AG31 – Product Backlog view would be more appropriate. In this view you can also assign stories to a sprint using the drop-down list in the Sprint column. Also, in this view, you can maintain any of the other fields to ensure full details of each story are available to help the Scrum Master or Product Owner maintain the product backlog.

Jame	- 50	vint - 00	- Epic	- Story Type	Story Priority	- Story	Points
Sprint: No Sprint	No Sprint	Yes	• chic	• story type •	story Priority	• Status •	0
Delete Tag to Asset	No Sprint	Yes		Business Story	Low Priority	Accepted	0
Create Users	No Sprint	Yes		Risk Story	Medium Priority		0
Delete Locatons	No Sprint	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted	0
Print Tag Inventory	No Sprint	~ Yes	,, j	Documentation Story	Medium Priority	New	0
Update Locations	No Sprint	Yes	Manage Inventory Locations	Team Story	High Priority	New	0
Sprint: Sprint 01	Sprint 01	Yes					40
Enter Asset Tags	Sprint 02	Yes		Business Story	High Priority	Sprint Rea	a 16
Determine Tag Location	Sprint 04	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete	8
Assocate Tag to Asset	Sprint 05	Yes		Risk Story	High Priority	Sprint Rea	a 16
Sprint: Sprint 02	Sprint 06	Yes					48
Update Asset Tags	Sprint 08	Yes		Technology Debt	Medium Priority	Sprint Rea	a 32
Update Tag to Asset	Sprint 09	Yes		Documentation Story	High Priority	Story Poir	16
Sprint: Sprint 03	Sprint 10	Yes					24
Validate Asset Tags	Sprint 11	Yes		Technology Debt	High Priority	In Progres	s 16
Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progres	5 8
Sprint: Sprint 04	Sprint 04	Yes					32
Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted	32
Sprint: Sprint 05	Sprint 05	Yes					4
Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progres	s 4
Sprint: Sprint 06	Sprint 06	Yes					0
Delete Asset Tags	Sprint 06	Yes		<b>Business Story</b>	High Priority	Accepted	0
Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progres	5 0
Sprint: Sprint 07	Sprint 07	Yes					0
Replace Asset Tags	Sprint 07	Yes		Risk Story	Low Priority	In Progres	s 0
Sprint: Sprint 08	Sprint 08	Yes					0
Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted	0
Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted	0

Maintain product backlog in view mode

## 1.1.4.1. Creating and Managing Epics

Traditionally there is no work associated with an epic (as the work is all done in the stories), so there is no need to create a task in Microsoft Project for Epics. To create an Epic, you simply have to enter the name of the Epic into the 'Epic' column in any of the agile views. We find that the 'AG31 – Product Backlog' view works very well for associating stories to an Epic.

	0	Name	+ Sprint	👻 ON	+ Epic	- Story Type -	Story Priority	👻 Status 👻	Points
		Sprint: Sprint 01	Sprint 01	Yes					40
31	4	Enter Asset Tags	Sprint 01	Yes		Business Story	High Priority	Sprint Rea	16
32	4	Determine Tag Location	Sprint 01	Yes	Manage Inventory Locations	Team Story	Medium Priority	Complete	8
33	~	Assocate Tag to Asset	Sprint 01	Yes		Risk Story	High Priority	Sprint Rea	16
		Sprint: Sprint 02	Sprint 02	Yes	E.				48
	4	Update Asset Tags	Sprint 02	Yes	Maintain Asset Tags	Technology Debt	Medium Priority	Sprint Rea	32
	4	Update Tag to Asset	Sprint 02	Yes	Maintain Asset Tags	Documentation Story	High Priority	Story Poir	16
		A Sprint: Sprint 03	Sprint 03	Yes					24
		Validate Asset Tags	Sprint 03	Yes	Maintain Asset Tags	Technology Debt	High Priority	In Progres	16
39		Update Users	Sprint 03	Yes		Team Story	Low Priority	In Progres	8
		A Sprint: Sprint 04	Sprint 04	Yes					32
42		Revalidate Asset Tags	Sprint 04	Yes		Business Story	Low Priority	Accepted	32
		Sprint: Sprint 05	Sprint 05	Yes					4
44		Confirm Tag Location	Sprint 05	Yes	Manage Inventory Locations	Implementation Story	High Priority	In Progres	4
		Sprint: Sprint 06	Sprint 06	Yes					0
		Delete Asset Tags	Sprint 06	Yes	Maintain Asset Tags	Business Story	High Priority	Accepted	0
47		Delete Users	Sprint 06	Yes		Business Story	Medium Priority	In Progres	0
			Sprint 07	Yes					0
	4	Replace Asset Tags	Sprint 07	Yes	Maintain Asset Tags	Risk Story	Low Priority	In Progres	0
			Sprint 08	Yes					0
52	~	Update Tag Location	Sprint 08	Yes	Manage Inventory Locations	Implementation Story	High Priority	Accepted	0
53	~	Define Locations	Sprint 08	Yes	Manage Inventory Locations	Business Story	Medium Priority	Accepted	0
			Sprint 09	Yes					0
55		Delete Tag to Asset	Sprint 09	Yes		Business Story	Low Priority	Accepted	0
		⊿ Sprint: Sprint 10	Sprint 10	Yes					0
58		Create Users	Sprint 10	Yes		Risk Story	Medium Priority		0
59		Delete Locatons	Sprint 10	Yes	Manage Inventory Locations	Risk Story	High Priority	Accepted	0
		Sprint: Sprint 11	Sprint 11	Yes					0
61		Print Tag Inventory	Sprint 11	Yes		Documentation Story	Medium Priority	New	0
62		Update Locations	Sprint 11	Yes	Manage Inventory Locations	Team Story	High Priority	New	0

### Associate stories with an Epic

You will notice in the preceding figure, this allows you to complete the stories for the epic over many sprints. You can view the status of epics using the 'AG35 – Epic' view.

	0	Task Name	Show • on		Story Priority		👻 Story Points 👻
		Epic: Maintain Asset Tags	Yes				64
5	~	Update Asset Tags	Yes	Technology Debt	Medium Priority	Sprint Ready	32
6	×	Update Tag to Asset	Yes	Documentation Story	High Priority	Story Point Ready	16
в		Validate Asset Tags	Yes	Technology Debt	High Priority	In Progress	16
6		Delete Asset Tags	Yes	Business Story	High Priority	Accepted	(
9	×	Replace Asset Tags	Yes	Risk Story	Low Priority	In Progress	(
		Epic: Manage Inventory Locations	Yes				12
2	×	Determine Tag Location	Yes	Team Story	Medium Priority	Complete	8
4		Confirm Tag Location	Yes	Implementation Story	High Priority	In Progress	4
2	4	Update Tag Location	Yes	Implementation Story	High Priority	Accepted	(
3	×	Define Locations	Yes	Business Story	Medium Priority	Accepted	(
9		Delete Locatons	Yes	Risk Story	High Priority	Accepted	(
		Update Locations	Yes	Team Story	High Priority	New	(

Associate stories with an Epic

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## 1.1.5. Planning a Sprint

While you can associate stories with a sprint in either of the Product Backlogs (board or view), the 'AG31 – Product Backlog' view is very practical for sprint planning. It allows you to assign a story to a sprint, validate the story points assigned to the sprint, and validate the readiness of the story to be assigned to a sprint.

	Product Current	Product Current	Story Scrum	Epics Other	Manage	New Accepted In Story Point	Sprint No Sto	ry No Story Not Sprint	Filter Hig	≪
	backlog board sprint board	backlog sprint	List Gantt Chart	Alga?	sprints	stories Progress Ready	Ready Type	Priority Ready	Clear C	.Hoar
amands	Agile Boards		Agile Views		Configuration	Story Status Maintenance		Story Validation	Other Acti	ons
-					Show					Story Story
0	Name		*	Sprint	v on	• Epic	<ul> <li>Story Type</li> </ul>	<ul> <li>Story Print</li> </ul>	ority 4	Status - Points -
-	Sprint: Sprint 01		Sprint 01		Tes		2	Sort A to Z		40
~	Enter Asset Tags		Sprint 01		Yes		Business S'	Sort Z to A		Sprint Rea 16
~	Determine Tag Locati	ion	Sprint 01		Yes	Manage Inventory Locations	Team Stor	Group on this field		Complete 8
~	Assocate Tag to Asset		Sprint 01		Yes		Risk Story	No. Consur		Sprint Rea 16
1	a oprint: oprint uz		Sprint 02		Tes	Malabala Assat Tana	Technology			40
~	Update Asset Tags		Sprint 02		res	Maintain Asset Tags	Technolog	Clear Filter from Story P	riority	Sprint Rea 32
*	Sprint: Sprint 02		Sprint 02		Yee	Maintain Asset Tags	Document	Filters		Story Poin 16
199	Validate Accet Tage		Sprint 02		Vac	Maintain Arret Tagr	Technolog	Select All)		In Brograd 16
110	Undate Users		Sprint 03		Vec	Mantain Asset Tags	Team Stor	High Priority		In Progres 10
	Update Users		Sprint 04		Yes		ream stor	Low Priority		32
-	Revalidate Asset Tags		Sprint 04		Yes		Business St	Medium Priority		Accented 32
-	A Sprint: Sprint 05		Sprint 05		Yes		Dusiness			4
110	Confirm Tag Location		Sprint 05		Yes	Manage Inventory Locations	Implement			In Progres 4
	A Sprint: Sprint 06		Sprint 06		Yes	manage intentory coefficies	mpremen			0
-	Delete Asset Tags		Sprint 06		Yes	Maintain Asset Tags	Business St			Accepted 0
122	Delete Users		Sprint 06		Yes		Business St			In Progres 0
	A Sprint: Sprint 07		Sprint 07		Yes					0
~	Replace Asset Tags		Sprint 07		Yes	Maintain Asset Tags	Risk Story			In Progres 0
	A Sprint: Sprint 08		Sprint 08		Yes					0
~	Update Tag Location		Sprint 08		Yes	Manage Inventory Locations	Implement			Accepted 0
~	Define Locations		Sprint 08		Yes	Manage Inventory Locations	Business St	OK	Cancel	Accepted 0
	A Sprint: Sprint 09		Sprint 09		Yes	-		324	Sources	0
	Delete Tag to Asset		Sprint 09		Yes		Business Sto	ry Low Priority		Accepted 0
	A Sprint: Sprint 10		Sprint 10		Yes					0
-	Create Users		Sprint 10		Yes		Risk Story	Medium Pric	rity	0
100	Delete Locatons		Sprint 10		Yes	Manage Inventory Locations	Risk Story	High Priority		Accepted 0
	A Sprint: Sprint 11		Sprint 11		Yes					0
	Print Tag Inventory		Sprint 11		Yes		Documentat	ion Story Medium Pric	rity	New 0
-			Sprint 11		Yes	Manage Inventory Locations	Team Story	High Priority		New 0



The 'AG31 – Product Backlog' view allows you to apply column filters (on the 'Story Type' or 'Story Priority' columns) to find the optimal stories for each sprint that have a 'Story Point' total count that is consistent with the team's velocity. In addition, this view supports the Story Status Maintenance and Story Validation buttons to facilitate sprint planning. With the appropriate stories assigned to the upcoming sprint(s), agile sprint planning is complete.

## 1.1.5.1. Maintaining Story Details

Although optional, you may also want to consider maintaining other information related to the story to leverage the full functionality of Microsoft PPM which supports enterprise resource management and portfolio reporting. The Product Backlog and Sprint boards/views use the 'Sprint Start' and 'Sprint Finish' date fields to manage and assign stories to Sprints (as discussed in the 'Developing the product backlog' section). Many organizations also leverage the full functionality of Microsoft Project to schedule the completion of the stories (or tasks in traditional Microsoft Project terminology) so that team member's timesheets are complete, and that organizational project, program and portfolio reports are accurate and include the agile work packages.

To do this, it is also important to ensure that the detailed tasks for each story are properly defined including the task type, Start/Finish dates and resource allocations. While you can maintain the task details in any view, including using the 'Task Information' dialog and the 'Task Entry' view (split view),

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we find the 'AG34 – Scrum Gantt Chart' view works well for this purpose as it is filtered to show only those stories that are either complete or scheduled for work in the current sprint. The following figure shows a split view with the 'AG34 – Scrum Gantt Chart' view in the top pane and the 'Task Form' view in the bottom pane.

	Release Plan X Complete	No	Oh	Oh	Oh	Omo	Jun 26 '18	NA	Jun 26 '18	27			
	+Sprint 1	Yes	58.28h	58.28h	Oh	13.88d	Jun 26 '18	Jun 26 '18	Jul 16 '18				
	Sprint 1 Kickoff	No	Oh	Oh	Oh	Od	Jun 26 '18	NA	Jun 26 '18	28			
~	Enter Asset Tags	Yes	20.28h	20.28h	Oh	10d	Jul 2 '18	Jul 2 '18	Jul 16 '18	31	Raphael Santos, Dale Howard		
~	Determine Tag Location	Yes	30h	30h	Oh	10d	Jul 2 '18	Jul 2 '18	Jul 16 '18	31	Steve Caseley[80%]		
~	Assocate Tag to Asset	Yes	8h	Sh	Oh	10d	Jul 2 '18	Jul 2 '18	Jul 16 '18	31	Dale Howard[10%]		
	Sprint 1 Completion	No	Oh	Oh	Oh	Od	Jul 16 '18	NA	Jul 16 '18	32,33,34	7/16		
	+ Sprint 2	Yes	108h	108h	Oh	10d	Jul 16 '18	Jul 16 '18	Jul 30 '18		F		
	Sprint 2 Kickoff	No	Oh	Oh	Oh	od	Jul 16 '18	NA	Jul 16 '18	35	s⊕ 7/16		
~	Update Asset Tags	Yes	44h	44h	Oh	10d	Jul 17 '18	Jul 17 '18	Jul 30 '18	37		Dale Howard[50%],Raphael	Santos[50%]
~	Update Tag to Asset	Yes	64h	64h	Oh	10d	Jul 17 '18	Jul 17 '18	Jul 30 '18	37		Steve Caseley[80%]	
	Sprint 2 Completion	No	Oh	oh	Oh	Od	Jul 30 '18	NA	Jul 30 '18	38,39		7/30	
	+ Sprint 3	Yes	36h	Oh	36h	10d	Jul 30 '18	NA	Aug 13 '18			r r	
	Sprint 3 Start	No	Oh	Oh	Oh	Od	Jul 30 '18	NA	Jul 30 '18	40		▶⊕ 7/30	
	Validate Asset Tags	Yes	24h	Oh	24h	10d	Jul 31 '18	NA	Aug 13 '18	42			Steve Caseley[25%],Raphael Santos[80%
	Update Users	Yes	12h	Oh	12h	10d	Jul 31 '18	NA	Aug 13 '18	42		1	Dale Howard[80%]
	Sprint 3 Kickoff	No	Oh	Oh	Oh	od	Aug 13 '18	NA	Aug 13 '18	43,44			++ 8/13
											4		
Mallatore	Asset Tags Duratio	v 10d	Effort driven	Manually Scheduler	Previous	Next							
SC Admont				There is the state	n v S.Comula	en 195							
Jul 31 'f	Binisty A	ap 13 '18'	Lask 1	STORE FIRST LARGE AND									
Jul 31 1	na v Finight A	ig 13.18	Task	spe rives corner		-							
Jul 31 1 Resource	Ha v Finight A	vy 13 '18 Work	ID Prodecesso	r Name	Type 1	ag ^							
Jul 31 1 Jul 31 1 Resource Steve Cas	tā v Finişiv Av o Nome Units seley 25% 4 Sentos 80% 1	Work Abh	ID Prodecesso 42 Sprint 3 Sta	r Name rt	Type 1 PS	od bo							
Jul 31 1 Jul 31 1 Resource Steve Cas Raphael 5	Name Units c Name Units seley 25% 4 Sentos 80% 1	ag 13 '18 Work P 9.2h	ID Prodecesso 42 Sprint 3 Sta	r Name rt	Type 1 #5	og û							
Jul 35 1 Jul 35 1 Resource Steve Cas Raphael 5	Ilă v Finişfr, A Name Units seley 25% 4 Santos 80% 1	work 0h 92h	ID Producesso 42 Sprint 3 Sta	rt The state	Type 1 FS	Dd Dd							
Jul 31 1 Jul 31 1 Resource Steve Cas Raphael 5	18 v Finishr A Norme Units sefery 23% 4 Sentos 20% 1	ag 13-18 Work A Bh 9.2h	ID Prodecesso 42 Sprint 3 Sta	rype Transa Sarano Ir Name rt	Type 1 PS	ag A							
Aut 31 11 Aut 31 11 Resource Steve Cas Raphael 5	18 Vanne - Units c Name - Units sefery 25% 4 Santos 80% 1	vg 13-18 Work • IBh 9.2h	ID Prodecesso 42 Sprint 3 Sta	n Name rf	Type 1 PS	ed N							
All 35 '1 All 35 '1 Resource Steve Cas	tā v Finipir A Name tolis serier 20% 5 Santos 80% 1	vg 13 18 Work • Rh 9.2h	ID Predecess 42 Sprint 3 Sta	r Name rt	Type 1 15	ag A							
a Jul 31 1 Jul 31 1 Resource Steve Cas Raphael 5	18 - Jinigir A Name Units extry 25% Santos 80% 1	49 13 18 Work 0h 92h	10 Prodecess 42 Sprint 3 Sta	nt Name rt	Type 1 75	ag A							
Iul 31 1     Resource     Steve Cas     Raphael 5	18 v Finity: A Nunn. Units undry 25% A Santos 80% 1	work 000 000 000 000 000 000 000 000 000 0	10 Prodecess 42 Sprint 3 Sta	rt Name rt	Type 1 PS	ag A		_					
Jul 31 11     Resource     Steve Cas     Raphael 5	18 V Fishgr A	work 6	10 Prodecesso 42 Sprint 3 Sta	ri Name ri	Type 1 PS	ag A				_			

## Story details

While the level of traditional Microsoft Project discipline applied to Stories will vary by organization, in general consideration should be given to the following:

- WBS structure and Summary tasks While optional, we recommend creating a Summary Task for each Sprint and organizing the committed stories under the appropriate summary task. These summary tasks should be one-to-one with the Sprints defined in the 'Manage Sprints' dialog. However, there is no direct connection between these, so it is important to manually ensure that they align.
- Dependencies We recommend using Sprint Start and Sprint Finish milestones which allow you to schedule each sprint sequentially while also allowing you to associate all stories within a sprint for completion in the appropriate timeframe.
- Task type While Stories can follow the conventional work-based philosophy and use the 'Fixed Work' task type, we find using 'Fixed Duration' and 'Effort Driven' where the task's 'Duration' is always the same as the sprint duration, fits the agile management principles best. This ensures the work is allocated to the proper timeframe, i.e. a 2-week sprint, while still allowing the team to self-organize and manage when the story will be completed during the daily standup.
- Resource assignment While optional for overall management of agile sprints, if you want stories to appear on team member's timesheets you must assign the appropriate team member(s) to each story to associate the work to a resource. As there is an expectation that the team will "self-manage" within a sprint, we recommend initially assigning all appropriate team members to each story to populate timesheets, recognizing that, in reality, the team may elect to complete the work slightly different during the daily-standups. Team members who do not actually work a story would then simply zero out the remaining work on their timesheets.

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Work estimation – Similar to resource assignment, while this is optional for overall management
of agile sprints, it is required if you want to use timesheets to track work on the stories. As there
is no direct relationship between the story point estimation for a story and the hours estimated
for the specific resource(s) assigned to a task, a rough-ballpark estimate of hours is sufficient to
ensure the team member(s) are able to track progress on their timesheets.

## Caution:

'Sprint Start' and 'Sprint Finish' are used exclusively in the Agile Boards and do not set or maintain the task 'Start' and 'Finish' dates. As a result, we recommend using Milestones and traditional Microsoft Project dependencies to schedule the stories for timesheets and organizational reporting.

## 1.1.5.2. Baselining Agile Projects

As agile projects are planned iteratively, they should also be baselined iteratively. To do this, you select the new stories (and any other work) committed to the next sprint and then from the 'Project ribbon > Schedule section', click the 'Set Baseline' pick list button and select the 'Set Baseline' item on the pick list. In the 'Set Baseline' dialog, ensure the 'Set baseline' radio button is selected, and 'Baseline' is selected from the list at the top of the dialog. Change the 'For' option to 'Selected tasks' and ensure both checkboxes are selected and then click the 'OK' button.

1	P 引		d G	iet Add-ins	0	M	O:					1.24	1	1	Statu	s Date: [	NA
Sub	proje	ct 🛔	M	ly Add-ins *	Project	Custom Fields	Manage	Links Between	WBS	Chang Working T	e ( lime	Calculate	Set	Move Projec		Ipdate Pro	ject
	nsert			Add-ins			-	Properties				1	Schedu			Status	
100	- >	nnt s															
		0		Task Name			- Sho	w on Board 🐱	Work		Actual V	Nork	Rem.	aining	- Duratio	00	- Star
	23			Confirm	n Release	Horizon	No		4h		Oh		4h		2h		Jun
	24			Develo	p Release	Strategy	No		2h		Oh		2h		1h		Jun
	25			Create	Release V	ision	No		4h		Oh		4h		1.33h		Jun
	26			Identify	Story For	cus for Rel	ease No		4h		Oh		4h		1.33h		Jun
	27			Develo	p Sprint St	rategies	No		12h		Oh		12h		4h		Jun
	28			Release H	lan X Con	plete	No		Oh		Oh		Oh		Omo		Jun
	30			+ Sprint 1			Yes		58.28h		58.28h		Oh		13.884	ł	Jun
	31			Sprint 1	Kickoff		No		Oh		Oh		Oh		Od		Jun
	32	~		Enter A	sset Tags		Yes		20.28h		20.28h		Oh		10d		Jul
	33	~		Determ	ine Tag Lo	cation	Yes		30h		POL		aL		104	26202	Jul
	34	~		Assocat	te Tag to A	lsset	Yes		8h		Set Ba	seline				×	Jul
	35			Sprint 1	Completi	on	No		Oh		• Set l	baseline					Jul .
	36			≠ Sprint 2			Yes		108h	1		Base	line	-			Jul
	37			Sprint 2	Kickoff		No		Oh	1	Oset	interim pl	lan	100			Jul .
	38	~		Update	Asset Tag	ts .	Yes		44h		000	w Sche	eduleri St	art/Finish			Jul
	39	~		Update	Tag to As	set	Yes		64h		100	Chair	++ Cipleb				Jul
	40			Sprint 2	Completi	on	No		Oh		For						Jul .
RT	41			# Sprint 3			Yes		36h		0	ntire pro	iert				Jul
H	42			Sprint 3	Start		No		Oh	4	0	selected t	acire				Jul 3
Ē	43	33		Validat	e Asset Ta	gs	Yes		24h								Oct
AN	44	33		Update	Users		Yes		12h			Roll up b	aselines:				Oct
MG	45			Sprint 3	Kickoff		No		Oh			To a	/I summa	ry tasks			Nov
RU	68			Sprint 4			Yes		Oh			Eron	n subtask	s into selec	ted summar	y task(s)	No
SC	69			Revalid	ate Asset	Tags	Yes		0h	1	-						No
34	70			✓ Sprint 5			Yes		Oh						Set a	s Default	Apr
AG	71			Confirm	n Tag Loca	tion	Yes		Oh		-		1				Apr
	72			Sprint 6			Yes		Oh		E	elp	110.00	OK	(	Cancel	Jan
	75			⊿ Sprint 7			Yes		Oh		Oh		Oh		30d		Apr
	78			Sprint 8			Yes		Oh		Oh		Oh		238d		Aug

#### Set sprint baseline

This will incrementally increase the baseline for each sprint as it is planned and rollup the new sprint details to all summary tasks, including to the 'Project Summary Task'.

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You should always set the baseline for each new sprint using this method as it will preserve any delivery variances in the project to date and will incrementally increase the approved project baseline to include the new sprint details.

## 1.1.6. Closing a Sprint

As part of each sprint's retrospective you should ensure that all stories are either completed or returned to the product backlog.

## 1.1.6.1. Closing Completed Stories

If your organization is using timesheets (or tasks) in PWA, and your sprint ends on a different day than the timesheet period, it is recommended that you use the 'Send Progress for Selected Tasks' function to have each team member provide an update on all work completed in the sprint. To do this, just prior to the retrospective, the team members would follow organizational timesheet policies to track all of their time to-date, but would then select only the lines associated with the stories for the project, and from the 'Timesheet ribbon > Submit' section, click the 'Send' pick list button and then select the 'Send Progress for Selected Tasks' item in the menu. As the Status Manager for these tasks, you can review and accept the updates which should update the status of all completed stories to 100%.



Submit end of sprint updates

Alternatively, if you are not using timesheets/tasks updates to record status of your agile projects, you can simply update the '% Complete' field to 100% for all completed stories directly in Microsoft Project. The easiest way to do this is to simply drag and drop all completed stories to the 'Done' column in the 'AG32 – Current Sprint Board'.

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SET % COMPLETE	SET % COMPLETE	SET % COMPLETE	% COMPLETE: 100	
+ New Task			Create Users Story Points:0 Story Priority: Medium Priority Story Type: Risk Story	~
			Delete Locatons Story Points:0 Story Priority:High Priority Story Type: Risk Story	×
		Reval Story Story Story Story	date Asset 32 riority: Low Priority Business	

Completing stories during the sprint retrospective

Alternatively, you can use the '100% Complete' button on the 'Task ribbon > Schedule' section to mark selected stories complete.



## 1.1.6.2. Returning Incomplete Stories to the Product Backlog

Consistent with agile principles, any stories not completed at the end of a sprint should be returned to the product backlog for completion in a future sprint. The 'AG31 – Product Backlog Board' works well for this as it allows you to drag and drop the not completed stories to the 'No Sprint' column. Alternatively, you can assign the story to any future sprint if the Product Owner has already determined which sprint the story should be assigned to.

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No Sprint Sprint 01 Sprint 02 Sprint 03 + New Task Enter Asset Tags Update Tag to Asset Update Users Story Points: 16 Story Priority: High Priority Story Points:8 Story Priority:Low Priority ory Points: 16 Story Priority: High Priority Story Type: Business Story Story Type: Documentation Story Story Type: Team Story Determine Tag Location Update Asset Tags Why Points 8 Story Points: 32 ory Priority: Medium Priority Story Priority: Medium Priority Story Type: Team Story Story Type: Technology Debt Assocate Tag to Asset Story Points: 16 Story Priority: High Priority Story Type: Risk Story

Return uncompleted stories to the product backlog

It's also an option to use the 'AG31 – Product Backlog' view to return incomplete stories to the product backlog.

Once the story is scheduled into a future sprint, you would follow the standard processes described above for planning a sprint.

Unlike agile principles, which state that a story is either complete or not-started, due to the way that Microsoft Project tracks any work completed on a story, the story (task) start dates will always reflect the actual start date when work was started during the original sprint, and cannot be changed as this preserves the work done to date on the story. When the story is rescheduled to a future sprint, the original start dates will be preserved, and the tasks duration will be extended to reflect that work took place over multiple sprints.

-	Mode +	Task Name +	WOIR +	Duration	♥ Start ♥	riilisii 👻	Add New Column 4	Desons	107.14	10/21	10/20	11/14	
	-5		24h	78d	Jul 30 '18	Nov 16 '18		Work		12h	12h		
								Act. Wc		12h	12h		
	-	Sprint 3 Start	Oh	Od	Jul 30 '18	Jul 30 '18		Work					
							Completed Story	Act. Wc			_		
4	-	✓ Validate Asset Tags	24h	10d	Oct 22 '18	Nov 4 '18		Work		12h	12h		
								Act. Wc		12h	12h		
		Steve Caseley	4.8h		Oct 22 '18	Nov 2 '18		Work		2.4h	2.4h		
								Act. Wc		2.4h	2.4h		
		Raphael Santos	19.2h		Oct 22 '18	Nov 2 '18		Work		9.6h	9.6h		
								Act. Wc		9.6h	9.6h		
	-	Sprint 3 Kickoff	Oh	Od	Nov 16 '18	Nov 16 '18		Work					
								Act. Wc					
	-	Sprint 4	171.86h	20d	Oct 22 '18	Nov 16 '18	In-complete Story	Work		7.1h	0.26h	82.5h	821
								Act. Wc		Zh			
	=	▲ Update Users	11.86h	20d	Oct 22 '18	Nov 16 '18		Work		7.1h	0.26h	2.5h	21
								Act. Wc		7h			
ulfr		Dale Howard	11.86h		Oct 22 '18	Nov 16 '18		Work		7.1h	0.26h	2.5h	21
								Act. Wc		7h			
111	-	▲ Revalidate Asset Ta	160h	10d	Nov 5 '18	Nov 16 '18	New Story	Work				80h	801
								Act. Wc					
		Raphael Santos	80h		Nov 5 '18	Nov 16 '18		Work				40h	401
		\$5						Act. Wc					
		Steve Caseley	80h		Nov 5 '18	Nov 16 '18		Work				40h	401
								Act. Wc					

Understanding incomplete stories

## 1.1.6.3. Confirming Agile Resource Engagements

Based on the Product Owner changing the duration of the agile project, you will need to adjust the existing resource engagements for the named resources assigned to your project. As discussed in the Planning a Sprint section above, agile uses the standard functionality for resource engagements and you can follow the instructions in Section 6.4.2 Responding to Out of Compliance Resource Engagements, in this book for more details.

## 1.1.7. Integration with Other Agile tools

As many organizations have significant investment in other tools to help manage agile projects, we have experienced significant interest in integrating tools such as JIRA with Microsoft Project and Project Online. Integrating these tools allows organizations to preserve their existing investment in agile-specific tools, while at the same time integrating the project and resource details with Microsoft Project for enterprise portfolio reporting and resource management.

#### 1.1.7.1. Jira

Ceptah Bridge, a third-party product from Ceptah Solutions (www.ceptah.com), provides a flexible, bidirectional integration between JIRA and Microsoft Project. JIRA and Microsoft Project integration will allow you to leverage each system for what each is good at – Microsoft Project for planning, structuring activities, scheduling and keeping everything under control – JIRA for working on tasks, collaboration, and reporting progress. Ceptah Bridge, based on its extensive set of configuration options, will synchronize data between the systems keeping both systems aligned with consistent data, so that you can focus on getting things done.

Basic	JIRA	Dir	MS Project
Status	Issue Key		Field* Text10 ·
Secondary	Project	->	Project Key     O Project Name
Time Tracking			Default* Field
Links	Summary	4	Task name path Separator: > Skip first 0      parent tasks
Sub-tasks	Epic Name		© Task name
Epic Link			• Another field
Sprint	Issue Type	*	Default* Field -
Rank	Priority	Q#	Default · Field ·
History	Due Date	Que .	• Finish
Tempo			© Field
Custom Fields	Assignee	Que -	Resource Name
Events			© Resource Field
Options			• Field
lira Connection			V Do not create issue if no assignee
			Ignore non-work resources

Ceptah Bridge configuration

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You can start your agile projects in JIRA and then based on pre-defined integration rules move committed stories and resource assignments to Microsoft Project. From there, you can generate enterprise portfolio, program and status reports and manage the capacity of all enterprise resources in a single place independent of delivery approach.

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## 1.2. Project Home

Addendum at a Glance – Microsoft added Project Home to help you quickly and easily access the projects and roadmaps you are interested in. In this addendum we review:

- Understanding Project Home
- Getting started
- Defining Favorites

## 1.2.1. Understanding Project Home

Project Home is a user-centric landing page that will allow you to quickly access roadmaps, projects and Project Web App (PWA). Project Home allows you to quickly access the things you have worked with most recently and to create favorites to facilitate even easier access to the important items you are focused on.

Project Home is designed to be your new starting point for all your project related work, and with a single click you can quickly launch new browser windows to:

- Open a roadmap
- Open a project in PWA
- Create a new roadmap
- Create a new project
- Launch the PWA home page

Project Home consolidates everything related to the projects in your organization and provides a configurable list of the items you are working with.

## 1.2.2. Getting Started

Project Home is launched by accessing <u>https://project.microsoft.com</u>. It can also be accessed by clicking the 'Project' icon from the Office 365 app launcher (or waffle icon) in the top left-hand section of an Office 365 page or from the home page at <u>https://www.office.com</u> by clicking the 'Project' icon.

The Project Home 'Recent' area features the last eight projects and Roadmaps that you have accessed. If the item you are looking for is lower in the list, you can click on the 'Show More' link as many times as needed to show the next eight additional recently accessed projects or roadmaps.

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					^	
Hi Steve Caseley					- 1	
Create New $ arsigma$					- 1	
Favorites						
Add projects to your favorites list for quick access.						
Recent						
D Name	Туре	Last accessed by you				
GenWorld Worldwide Database Consolidation	Project	A minute ago			- 1	
MTA Light Rail Mobile App	Project	A minute ago				
GPS Software for Air Traffic Control Systems	Project	A minute ago			- 1	
Zurich Database Upgrade	Project	A minute ago			- 1	
Greenwood Data Consolidation	Project	A minute ago			- 1	
Server Farm Upgrade and Replacement	Project	A minute ago			- 1	
Malibu Database Technology R250 Software Development	Project	Several minutes ago			- 1	
📾 Rose Garden Monitor System	Project	Several minutes ago			- 1	
Show more $\vee$					- 1	
Go to Project Web App $\rightarrow$			1	- Consulta		
				Feedba	ICK	

#### Project Home

Clicking on a project or roadmap will launch a new browser window taking you directly to the last page you were working with. When you click on a project from the 'Recent' list or your 'Favorites' list, it displays the last accessed page for that project in a separate tab within your browser. In fact, all the links on the Project Home page launch in a separate tab, allowing you to keep the Project Home tab open for ease of access to other projects or roadmaps.

#### Tips & Hints:

Project Home will show all projects and roadmaps that you have accessed, even if they span different PWA instances within your tenant.

If you need to access a project that is not in your 'Recent' list, Project Home also features a 'Go to Project Web App' link at the bottom of the page. This will take you to the existing PWA Home Page for your default site.

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Go to Project Web App link

Caution:

This link opens the default site collection at /sites/pwa. At this point, you do not have the option of changing this setting.

Project Home also features a 'Create New' button that currently lists 'Project' and 'Roadmap' in the drop-down menu. If you click 'Project', it will open a new browser window with the 'Create a new project' page from your Project Online instance at /sites/pwa. If you click 'Roadmap', it will open a new browser window with the 'New Roadmap' page.

Microsoft is planning to incorporate other types of projects into Project Home from within the Microsoft ecosystem, such as Planner, Azure DevOps, and Dynamics Project Service Automation (PSA).

## 1.2.3. Defining Favorites

Project Home also features a 'Favorites' section that allows you to mark projects or roadmaps as favorites. To create a favorite, float your mouse pointer over the project and click the 'Star' icon, or click the ellipsis and select the 'Add to favorites' item on the menu.

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D	Name	_		Туре	Last accessed by you	
1	GenWorld Worldwide Database Consolidation		☆ :	Project	Several minutes ago	
Ð	MTA Light Rail Mobile App	Add to favorite	Mark Favorite	Project	A minute ago	
	GPS Software for Air Traffic Control Systems	Remove from lis	st	Project	A minute ago	
73	Zurich Database Upgrade			Project	A minute ago	

#### Add Favorite

By default, Home will display only 8 Favorites. You can click 'Show more' if the one you wanted isn't visible. Creating more than eight will move the "oldest" one and add the new one to the top of the list.

You can remove a project from the Favorites lists by clicking the ellipsis and selecting 'Remove from favorites' item on the menu.

You can choose to remove a project from the Recent lists as well by clicking the ellipsis and choosing 'Remove from list'.

#### Tips & Hints

If you want to re-order the sequence of your favorites, you will need to remove and re-add the favorites in the reverse order you wish to have them displayed. The last favorite added is always first in the list.

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# 1.3. Building and Using Roadmap

Addendum at a Glance – Microsoft added Roadmap to tie top-down portfolio management into the existing project and program management platforms that are in use in your organization. In this addendum we review:

- Understanding Roadmap
- Getting started
- Building a Roadmap
- Using Roadmap

## 1.3.1. Understanding Roadmap

Roadmap allows you to create timeline views of strategic initiatives across the enterprise. You can configure the Roadmap to include targeted key dates for the overall initiative and then pull in milestones, phases, and tasks from individual projects providing appropriate details to executives with a succinct overview of how strategy is translated into execution.

Roadmaps can also be created for departments or programs and can be shared with specific audiences to ensure all stakeholders are engaged and aware of the status of the areas that interest them. Roadmaps provides a central location for tracking project work across the enterprise and effectively communicate how business value is delivered to all project stakeholders.



Microsoft Roadmap

#### Electronic Addendum

At this time, you can include work from Project Online and Azure Boards (formerly VSTS) in a Roadmap, but in future releases, Microsoft will add support for Planner and third-party services like Jira.

## 1.3.2. Getting started

You can use the Roadmap to combine vital information from multiple projects to view the status of programs and portfolios in a visual and interactive way.

To create a new Roadmap, navigate to Project Home which can be launched by accessing <u>https://project.microsoft.com</u>. It can also be accessed by clicking the 'Project' icon from the Office 365 app launcher (or waffle icon) in the top left-hand section of an Office 365 page or from the home page at <u>https://www.office.com</u> by clicking the Project icon.

To create a new Roadmap, click the 'Create New' button and then choose 'Roadmap'.

Create New ∨ Roadmap Project	d as favorites will appear here.	

#### Creating a new Roadmap

When a new Roadmap is created, a blank canvas is presented. The canvas layout is clean and intuitive, representing the modern concept that Microsoft is introducing.



New Roadmap

#### Electronic Addendum

Although you do not need to name the Roadmap, we recommend always giving each one a meaningful name so that it can be shared with the stakeholders.

## 1.3.3. Building a Roadmap

The Roadmap now needs to be defined to display all the items of interest to the stakeholders. A Roadmap is composed of rows which host items that can be connected to either Project Online or Azure Boards.

Click on '+ Add row' to add details to your Roadmap. With the new row added, in the right-hand pane, give the row a descriptive title that will be meaningful to anyone who views the Roadmap. Also, you must specify an owner, in other words the person you would contact to get more details, and then the data source for the row, either Project Online or Azure Boards.

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Christoph Werner Manager							Connection
							Connect to a project $$
							Project Online
							Azure Boards

## Adding a row to the Roadmap

Roadmap uses <u>Microsoft Flow</u> to keep the data current as changes are made in the connected project schedule(s). When connecting to Project Online (Azure Board connections are discussed later), you first specify the Project Web App URL to configure the 'Flow' connection.

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Project Web App URL			- 11	
https://sharepoint.com/sites/pwa			∠	
✓ Looks good			- 11	
Choose a project				
, Building Alpha			- 11	
Connect to project ①			- 11	
Get updates to Roadmap from Project On By Microsoft	line			
Connect			-	
See details			~	
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Project Online			- 11	
Read your user profile			- 11	
<ul> <li>Create, read, and update projects, tasks, and resources</li> <li>Check out, check in, and publish projects</li> </ul>				
			- 18	
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Powered by Microsoft Flow			- 11	
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Next, you use the text search to select the project from Project Online. In this first example, we will be connecting to a project called 'Building Alpha'.

ampus Refresh								Connect to a project
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idding Alpha Nate Auchter Director of Products and Se								Choose a project  Choose a project  AdventureWorks Cycles Building Maintenance Building Apha Building Beta Building Deta Building Deta Southbridge Central Building Facility

Choosing a project

Once connected, you can populate the row with summary tasks, milestones or tasks from the project schedule. From the 'Row items' pane on the right, you can search for any schedule item that you want to include on the Roadmap.

Add row 🗄 Add key date 🕂	Add row item 📧 Detai	Is ↑ Move up ↓ Move down	Remove row				Add items Building Alpha
DEC 23 ilding Alpha Nate Auchter Director of Preducts and So	DEC 30	JAN 6 2019 JAN 13	OS MAL	JAN 27	FEB 3	FEB 10	

Adding items from the project schedule on the row

Once you have defined all the items to be included on the row, close the dialog and validate that the row displays the appropriate information.

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Tasks and milestones added to the row

## 1.3.3.1. Setting the task status

The Roadmap allows you to set the status of any item displayed. To do this, click on a task and choose one of the available options to define the current status of the task.

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Setting the task status

Setting the status changes the color of the item on the Roadmap.

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			• Conrike	om b		<ul> <li>Contribution</li> </ul>					On track ~

Task details

```
Proactive PPM with Microsoft Project 2016
For Project Online and Project Server
```

## Caution

The status on the Roadmap does not have a direct relationship with the task status in the project schedule. Rather, you have the opportunity to set the status manually in the Roadmap. You can always check the status in Project Online by navigating back to the project schedule from the connection link.

## 1.3.3.2. Adding details from Project Web App

Once you have a project row defined in Roadmap, you can directly add schedule components to it directly in PWA. Open the appropriate project open in PWA and ensure that the Schedule PDP is displayed. Select the appropriate tasks from the view and then click 'Add to Roadmap' from the 'Task ribbon > Tasks section'.



Adding schedule components to Roadmap from PWA

On the 'Add to Roadmap' dialog select the Roadmap and Row that the selected tasks will be added to.

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Add To Roadmap	×
Roadmap*	
Customer Retention Initiative	$\sim$
Row	
Tenant Renewal	$\sim$
	Add

#### Add to Roadmap dialog

We find this functionality specifically useful as it will allow you to add the 'Project Summary' task to a roadmap. Click 'Add' and return to the Roadmap to view the updated roadmap and set the new items status as required.



## 1.3.3.3. Adding new rows

As a Roadmap is intended to represent a program, portfolio or departmental view, you will need to create additional rows to add more projects to your Roadmap. Each new row can represent a collection of important tasks from a different project that is also of interest to the stakeholders. Follow the steps described above to configure each new row.

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## New rows added to the Roadmap

You can use the 'Move up' or 'Move down' buttons to organize the layout of your Roadmap.

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## 1.3.3.4. Key dates

In addition, you also can add 'Key Dates' to the Roadmap. Think of 'Key Dates' as organizational milestones that should be watched for the entire Roadmap and are typically not linked to a specific item in the project schedules. Stakeholders can then easily compare the milestones from connected projects to the 'Key Dates' that have been added at the Roadmap/Program level.

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You can add 'Key Dates' to your Roadmap by clicking in the 'Add key date' button and providing the Name, Due Date and Status.

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Building Alpha	Key date		- 100		
Nate Auch	Coffee Machine Installed				
	Due date				
	Fri Jan 25 2019				
	Status				
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CEO & Mar					
	Add key date				
Building Delta					

Adding Key dates to the Roadmap

Once added, Key dates will be displayed at the top of the Roadmap, in the Timeline area:

ampus Refresh			ZoomO							Go to date g <sup>Q</sup> Members	
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ilding Delta Steve Caseley Principal Consultant					• Training Room 1	Al Laboratory	Al Laboratory Comple Building Delta IoT Laboratory	te Complete Complete			
						Trainin					

*Key dates added to the Roadmap* 

## 1.3.4. Connecting to Azure Boards

Roadmaps have been designed to display projects from multiple platforms allowing your organization to pick the optimal method when managing projects, tasks, and work (Project Online or Azure Boards) while allowing you to integrate the details into a common roadmap.

As was previously done when connecting with Project Online, start by inserting a new row into your roadmap, this time using Azure Boards in the connection area. Provide the Azure DevOps URL and confirm the 'Flow' connection to the tenant.



#### Connecting to Azure Boards

After the connection is configured, you will be able to add the work items from Azure Boards that are relevant to the program. As with Project Online, first you choose the appropriate project and then select the details to be shown on the Roadmap.

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- Add row 📳 Add key date	+ Add row item [	Ⅲ Details 个 Move up ↓ Mo	re down 📋 Remove	row			Building Bet	a Complete 🏾 🌻 Build	ng Delta complete		
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										- Constant	

New row with items from Azure Boards

## 1.3.5. Using Roadmap

You have the ability to adjust the display to help you focus on what's relevant to you based on a specific information requirement:

- **Zoom**: By using Zoom you can increase or decrease the time period displayed to accommodate the items that are relevant to you.
- Filter: You can also apply filters to show only the items for a specific row owner.
- **Go to date**: If your Roadmap has multiple items that span across a wide period, you can easily focus on a period that is important to you.
- **Navigation**: You can also use the horizontal scroll to quickly move to past or future periods.

## 1.3.6. Sharing ae Roadmap

As a Roadmap owner, I can share my Roadmaps with other people in the organization. I use the 'Members' area on the toolbar to invite my stakeholders to view the roadmap. I can either share with an existing group that I own or create a new group from scratch. I can let everyone know they can view the roadmap.