Borland®

Atlas 2.0

Atlas Help

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Welcome to Atlas

Welcome to *Borland Atlas*

Getting Started

What's new

Release Notes

Featured sections

Atlas Home
Gather and Share Ideas
Define and Scope Your Requirements
Plan Your Requirements
Track Progress

Atlas Videos

Overview
Whiteboards
More videos on our *Youtube channel*

Online resources

Web Based Training at our Training Store
Micro Focus Product Updates
Micro Focus Community Forums
Micro Focus Infocenter
Micro Focus SupportLine

Provide feedback

Email us feedback regarding this Help

About Atlas

Borland Atlas is a collaborative, flexible, agile requirements and delivery platform. This web-based requirements tool enables business analysts, product managers, and other project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (pictures, presentations, documents, videos).
- Organize and structure those ideas into well formed requirements.
- Prioritize and plan those requirements into a specific time-frame given their agile teams velocity.
- Track the progress of their agile teams work towards their requirements, independently of their agile tool of choice.

In addition to the Online Help, Installation Guide, and Release Notes, for more information about Borland Atlas, refer to *Borland.com* and the *Borland Community*.

Getting Started

Atlas is a web-based, lightweight requirements tool focused in enabling business analysts, product managers and other project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (pictures, presentations, documents, videos).
- Organize and structure those ideas into well-formed requirements.
- Prioritize and plan those requirements into a specific time-frame given their agile team's velocity.
- Track the progress of their agile teams work towards their requirements, independently of their agile tool of choice.
- Easily search for specific items.

Atlas consists of five perspectives. The icons to access the perspectives are located across the top of the page:

- Home
- Gather
- Define
- Plan
- Track
- Search

Agile Requirements Management

Requirements Management

Requirements management involves establishing and maintaining agreement between customer and developer on both technical and non-technical requirements. This agreement forms the basis for estimating, planning, performing, and tracking project activities throughout the project and for maintaining and enhancing developed software. Studies have shown that 30-35% of software development effort is spent on rework, over 50% of software defects are attributed to requirement errors and over 80% of rework effort is spent on requirements related defects. Getting requirements management right pays huge dividends in delivering software solutions to your customers in a time frame that satisfies them.

Agile Requirements

Requirements follow an iterative planning cycle. From conceptualization, to review, and through edits, requirements evolve into a plan for development. It is from this point,

when the requirement is handed over to the development team, that the requirement becomes Agile.

What is agile development? It is an interactive method used to determine requirements for development projects. It is highly flexible and interactive, allowing the project scope to change rapidly and frequently. There are many tools on the market that enable and enhance the agile development cycle.

Atlas, with its requirements management, white boards, and plan development, is a perfect tool to use in an agile environment. Integrating with agile tools enables project managers to link requirements to user stories and view progress for each iteration. Atlas provides the ability for project managers to recognize scope creep and react quickly. Also, they can determine from the status tab or Track perspective, whether a change to a requirement will negatively impact the delivery dates.

Additionally, open communication between team members and project stakeholders is essential to the success of an agile team. Atlas's discussion functionality provides this critical ability to all members of the team, allowing rapid changes to the project as it evolves.

How Projects Are Organized

Before you start to use Atlas, you'll need to understand the organizational structure. Atlas uses Projects, Requirement Types, and Requirements to organize and convey information. These levels are nested within each other, with Projects being the topmost container.

Projects	Atlas stores requirements in Projects. Projects stored in the same server share a common set of properties (requirement types, attributes, security profiles, users and groups).
Requirement Types	Atlas organizes requirements by type. A Requirement Type defines a logical grouping of Requirements that share common attributes. Atlas makes it easy to reuse Requirement Types among projects. Once created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.
Requirements	Requirements are the primary artifact in Atlas. The primary means to view Requirements include the **Requirement Tree** and the **Requirement Grid**. You can toggle between the two by clicking the corresponding icon in the **Define** perspective.

Using Atlas

Your Atlas administrator has installed and configured Atlas and has provided you with an URL for access.

Atlas is organized to follow a natural flow of requirement creation to user story breakdown. As you work through the perspectives, you are following the flow from the requirement creation to tracking progress in your Agile tool. However, you can skip around within the perspectives and work in your own flow.

Use these steps for a basic overview of tasks to complete your planning from start to finish. Navigate through the perspective sections of the help to view additional and advanced tasks.

The suggested flow is:

1. Navigate to Atlas in your browser and log in. Atlas opens.
2. Capture high-level business needs and break them down.
   a) Create a Project.

b) Define Requirement Type.
c) Set up user-defined attributes.
d) Optional: upload ideas to the Whiteboard.
e) Create Requirements for the project. You can create requirements or convert Whiteboard concepts to Requirements. You can also setup relationships between Whiteboard and Requirement or Requirements to Requirements.

3. Rank backlog of Requirements.
   a) Change item rank in list.
   b) Open requirement in hierarchical context from the Grid view (flat list).
   c) View Requirement subsets in Grid.
   d) Order Requirements based on rank within the Grid.
4. Create a plan and add Requirements to the plan.
   a) View list of plans.
   b) Open a plan.
   c) Review items to include in plan.
   d) Use plan contents and team capacity to project plan end date.
   e) Define a requirement plan with start and end dates.
   f) Review hierarchical list of item to include in plan.
5. Add requirement detail to top of backlog.
   a) Understand summary delivery status from an individual requirement.
   b) Find and existing requirement using search.
   c) View status of related stories from within a Requirement.
6. Send Requirements to Agile backlog.
   a) Optional: add additional Requirement to a previously pushed plan.
   b) Optional: resend an updated Requirement.
   c) Optional: resend an updated plan.
7. Track Requirement and story progress.
   a) View plans with high level status.
   b) View plan delivery status and analyze progress and projection.
   c) View delivery plan from previous date.

Administration

The project administrator creates and customizes the projects within Atlas. Most of the requirement and project set up is completed in the Administrator Tool. A few of the tasks a project administrator performs are:

- Create projects
- Create requirement types
- Associate requirement types with projects
- Set project access rights for users
- Create users
- Define user-defined attributes
- Organize user-defined attributes into groups

Accessing Borland Connect

If you need to change configuration or add Agile tools, you can access Borland Connect through Atlas. You can also access the community for more documentation and information about Borland Connect.

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.
3. Click the **Connect** tab. The **Connect** tab opens.
4. Click **Open**. Borland Connect opens.

Setting Requirement Send Preferences

Only server administrators can set up the way requirements are sent to the backlog.

There are two ways for sent requirements to populate the Agile backlog: at the root of the backlog or under an existing story. These options are per project and must be set for each new project.

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.
3. Click the **Defaults** tab.
4. Click **Agile integration**. The Agile send options appear.
5. Select one:

Option	Description
Root of Backlog	When requirements are pushed from **Define** or **Plan** perspective, they appear at the top level of the Agile backlog.
Under Existing Story	When requirements are pushed from **Define** or **Plan** perspective, they appear nested under the selected user story. After selecting this option, choose the parent user story.

6. Click **Save**.

Creating Status and Priority Values

Atlas provides a set of status and priority values. However, you may use different terms to indicate the status or priority. To create custom status and priority values:

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.
3. Click the **Defaults** tab.
4. Click **Workflow**. The default options appear.
5. Click **Add Value** in **Status** or **Priority** sections. A value text field appears.
6. Type the value name and press `Enter`. The value appears in the appropriate section and is checked to include as a requirement option.
7. Repeat for each new value.
8. Click **Save**.

Requirement Types

Atlas organizes requirements by type. A Requirement Type defines a logical grouping of Requirements that will share common attributes.

The key properties of Requirement Type are:

- a name (displayed in the requirement tree)
- filter by Requirement Type
- a set of user-defined attributes on the user interface

Atlas makes it easy to reuse Requirement Types among Projects. Once created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.

Defining Requirement Types

You must be a server administrator or a project administrator in order to define requirement types. If you are not logged in as an administrator, you cannot access the Admin tool.

All new projects contain Business Requirement type and Software Requirement type by default.

1. Log in as administrator.
2. Click **My Home**. The **My Home** page opens.
3. Select a project from the **Project** list. The project becomes active.
4. Click **Admin Tools**. The **Administrative Tools** dialog appears.
5. Click **Define Requirement Types**.
6. Click the arrow next to the requirement types in the **Available Requirement Types** list to associate to the project or click **New Requirement Type** and complete the appropriate fields to create a new Requirement Type.. The requirement type moves to the **Associated Requirement Types** list.
7. Close the dialog.

Setting Default Requirement Values

Only project administrator can set default values.

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.
3. Click the **Defaults** tab.
4. Click **Workflow**. The default options appear.
5. Select default values in the **Rank**, **Estimate**, **Status**, and **Priority**.
6. Click **Save**.

After the defaults are set, the default values appears in the appropriate fields when you create a requirement. You can override the defaults by editing the appropriate fields in the requirement.

Setting User-Defined Attributes

Only administrators can set up User-Defined Attributes (UDAs).

User-defined attributes allow users to customize the data that is tracked and stored, fully defining the requirement. An administrator assigns user-defined attributes during requirement type creation or project creation.

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.
3. Click the **Define UDAs** tab.
4. Select an UDA from the UDA list or click **New User Defined Attribute** to create a new UDA. If creating a new UDA, type a name and display name, select the UDA type and complete the appropriate fields. Click **Save**.

Organizing User-Defined Attributes

You can organize the way attributes are displayed on the **Attribute** tab with groups.

1. Open the **Home** perspective.
2. Click **Admin Tools**. The **Administrator Tools** dialog box appears.

3. Click the **Organize UDAs** tab.
4. Click **New Group** to create a new group or select and existing group from the list.
5. Click the **+** next to the UDA to add to the group from the **Available UDAs** list.
6. Close the **Administrator Tools** dialog box.

Home

Home is your starting page where you can find your favorite Projects, read the latest activity, navigate to new Projects, create a Project, and modify a Project.

If you would like to open an item in you activity feed, click the **Go to** icon next to the activity item. Atlas opens in the correct perspective and to the item you selected.

Creating a Project

You must create projects in order to add Whiteboards and Requirements. Projects organize the information into a high-level category.

1. Open the **Home** perspective. Your favorite projects and new activity appear in the appropriate panes.
2. Click **New Project**. The **Create Project** dialog appears.
3. Type the name of the project.
4. Choose visibility option from the list.
5. Type a description of the project.
6. Click **Create**.

   To view activity on the project, click the star next to the project name in the **Project** list to add it to your Favorites.

Deleting a Project

You must have administrator rights to delete projects.

1. Open the **Home** perspective. Your favorite projects and new activity appear in the appropriate panes.
2. Hover over the project you want to delete. The **Delete** and **Edit** icons appear next to the project.
3. Click the **Delete** icon. The project is deleted.

Editing a Project

1. Open the **Home** perspective. Your favorite projects and new activity appear in the appropriate panes.
2. Hover over the project you want to edit. The **Delete** and **Edit** icons appear next to the project.
3. Click the **Edit** icon. The **Edit Project** dialog appears.
4. Make changes to the project name or description.
5. Click **Save**.

Opening a Project

You must open a project before you can create whiteboards, create requirements, create plans, and track plans.

Note: After you've selected favorite projects by clicking the **Favorite** icon, you can open projects from your **Favorites** list.

1. Open the **Home** perspective. Your favorite projects and new activity appear in the appropriate panes.
2. Optional: Type the project name in the **Find Project** field. The project list displays projects matching the name.
3. Select a project from the **Project** list. The project becomes active and you can navigate through perspectives for the project.

Replying to Discussions

If you have been tagged in a discussion or if you have a project listed as a favorite on your Activity view, you will receive notification that there is an unread discussion.

1. Open the **Home** perspective. Your favorite projects and new activity appear in the appropriate panes.
2. Click the project with the notification badge next to it. Activities for the project appear in the **Activities** pane.
3. Click the **Quick Look** icon next to the discussion. The **Discussions** view appears.
4. Type a reply and click **Add**.

Reports

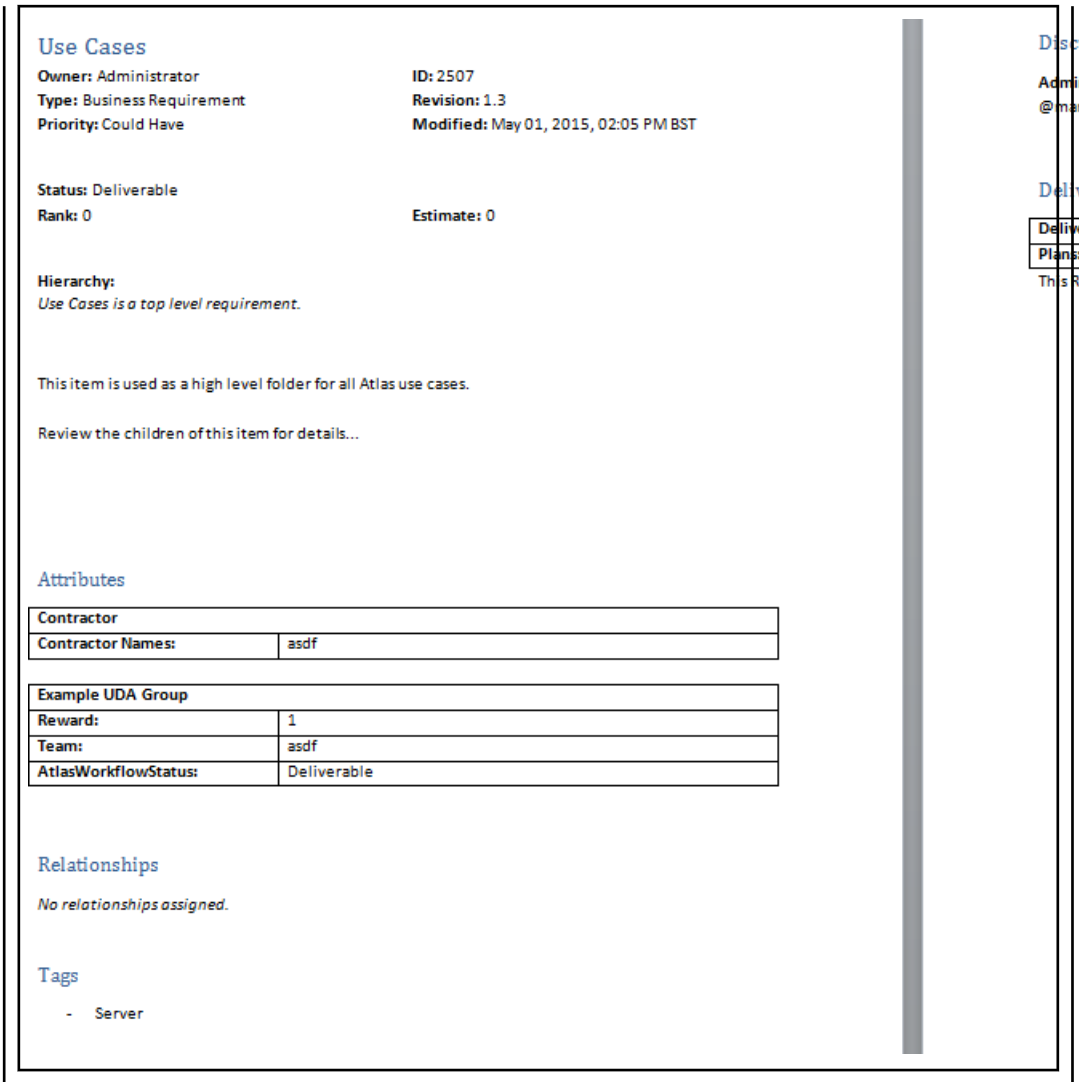
You can create Requirements reports, Plan Review reports, and Plan Tracking reports from the **Home** perspective. The reports are output as Word Document (.docx) files.

- **Requirements**: includes all project requirements, unless a filter is set.
- **Plan Review**: includes selected plan and its associated requirements for the project.
- **Plan Tracking**: includes selected plan that is in production and the requirements, stories, and status within it.

Generating Requirements Reports

1. Open **Home** perspective.
2. Open the project for which you want to generate a report.
3. Click **Reports**. The **Reports** dialog appears.
4. Select **Requirements**.
5. Optional: Check **Filter** and select a quick filter to include only items for a specific set.
6. Check or un-check the information to include in the report.
    - **Attribute**: Includes the user-defined attributes for the requirements.
    - **Relationships**: Includes a list of the items related to each requirement.
    - **Tags**: Includes the tags associated with the requirements.
    - **Discussions**: includes the discussion threads associated with each requirement.
    - **Delivery Tracking**: Includes the tracking status.
7. Click **Generate**. The report is generated as a .docx file and your browser provides the option to open or save the file.

> **Example Requirements Report**
>
> The requirements report contains a cover page and a table or contents. The cover page contains the project name, the type of report, who generated the report, and the date the report was generated.
>
> The body of the report appears as:



Use Cases

Owner: Administrator
ID: 2507
Type: Business Requirement
Revision: 1.3
Priority: Could Have
Modified: May 01, 2015, 02:05 PM BST

Status: Deliverable
Rank: 0
Estimate: 0

Hierarchy:
Use Cases is a top level requirement.

This item is used as a high level folder for all Atlas use cases.

Review the children of this item for details...

Attributes

Contractor	
Contractor Names:	asdf

Example UDA Group	
Reward:	1
Team:	asdf
AtlasWorkflowStatus:	Deliverable

Relationships

No relationships assigned.

Tags

- Server

Discussions

Administrator on June 11, 2015 at 12:
@markho - lets talk over some of these

Delivery Tracking Information

Delivery Status:	Not
Plans:	Non

This Requirement is not yet shared on

The example image is displayed as a two page spread to showcase all the selected options within the report.

Generating Plan Review Reports

The Plan Review report contains information for plans that have not been pushed to an Agile tool. These are plans that are still being developed.

1. Open **Home** perspective.
2. Open the project for which you want to generate a report.
3. Click **Reports**. The **Reports** dialog appears.
4. Select **Plan Review**.
5. Choose the test plan from the **Plan** list.
6. Check or un-check the information to include in the report.

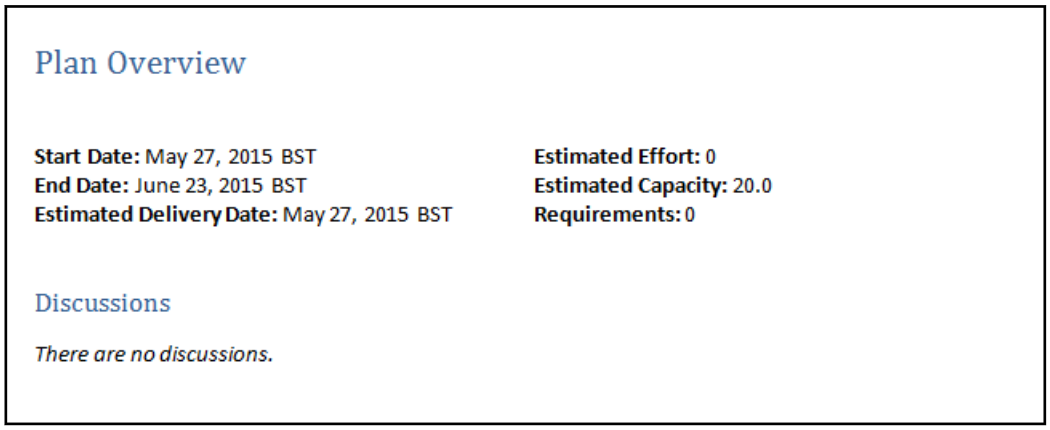
- **Attribute**: Includes the user-defined attributes for the requirements.
- **Relationships**: Includes a list of the items related to each requirement.
- **Tags**: Includes the tags associated with the requirements.
- **Discussions**: includes the discussion threads associated with each requirement.
- **Delivery Tracking**: Includes the tracking status.

7. Click **Generate**. The report is generated as a .docx file and your browser provides the option to open or save the file.

Plan Review Report Example

The Plan Review report contains a cover page and a table or contents. The cover page contains the plan name, project name, the type of report, who generated the report, and the date the report was generated.

The body of the report appears as:



The remainder of the report lists the associated requirements, displayed the same as in the Requirements report.

Generating Plan Tracking Reports

Plan Tracking reports contain plans that have been pushed to your agile tool and are in production. These reports include user story data from the agile tool as well as the requirements information and plan information from within Borland Atlas.

1. Open **Home** perspective.
2. Open the project for which you want to generate a report.
3. Click **Reports**. The **Reports** dialog appears.
4. Select **Plan Tracking**.
5. Choose the plan from the **Plan** list.
6. Check or un-check the information to include in the report.
   - **Attribute**: Includes the user-defined attributes for the requirements.
   - **Relationships**: Includes a list of the items related to each requirement.
   - **Tags**: Includes the tags associated with the requirements.
   - **Discussions**: includes the discussion threads associated with each requirement.
   - **Delivery Tracking**: Includes the tracking status.
7. Click **Generate**. The report is generated as a .docx file and your browser provides the option to open or save the file.

Plan Tracking Report Example

The Plan Tracking report contains a cover page and a table or contents. The cover page contains the plan name, project name, the type of report, who generated the report, and the date the report was generated.

The body of the report contains plan details, plan status, requirements, and user story data. The body of the report appears as:

Plan Overview

Start Date: April 30, 2015 BST
End Date: June 01, 2015 BST
Items: 2

Completed: 0% (None)
Started: 0% (None)
Not Started: 100% (2 items)
Blocked: 0% (None)

Discussions

There are no discussions.

The requirements for the plan appear as follows depending on the options selected:

Add multi-selection list type UDA

Owner:
Type: Business Requirement
Priority: Must Have

ID: 2658
Revision: 1.0
Modified: May 01, 2015, 10:24 AM BST

Status: Draft test
Rank: 10

Estimate: 8

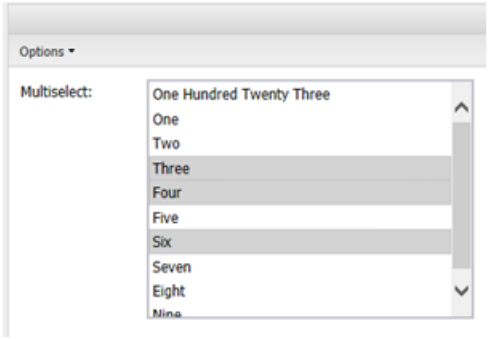
Hierarchy:

- 2550: System and User Administration
- 2649: Flexible type creation
- 2656: UDA types

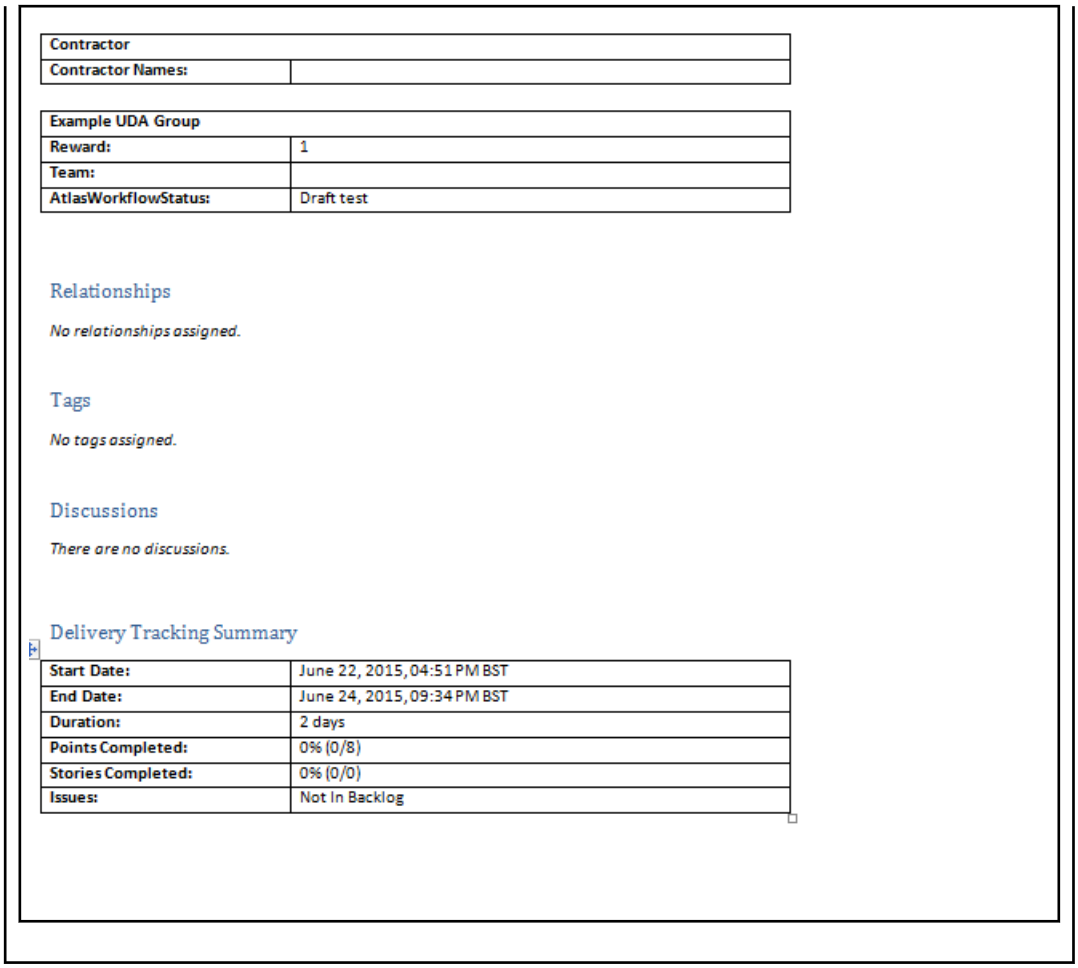
NOTES: two parts:

1 Admin to create attribute and define values
2 Editing control (custom check / selection)

Support multi-selection list as an attribute type. Ideally this will contian checkboxes, and a list. We to beware of losing selected values.
http://dev.sencha.com/extjs/5.0.0/examples/multiselect/multiselect-demo.html



Attributes



Contractor	
Contractor Names:	

Example UDA Group	
Reward:	1
Team:	
AtlasWorkflowStatus:	Draft test

Relationships

No relationships assigned.

Tags

No tags assigned.

Discussions

There are no discussions.

Delivery Tracking Summary

Start Date:	June 22, 2015, 04:51 PM BST
End Date:	June 24, 2015, 09:34 PM BST
Duration:	2 days
Points Completed:	0% (0/8)
Stories Completed:	0% (0/0)
Issues:	Not In Backlog

Editing Your Profile

You can change or add your email and phone number. You can also change your password.

1. Open the **Home** perspective.
2. Click your user name and choose **Edit Profile**. The **Edit your profile details** dialog appears.
3. Change your name, email address, phone number, or password.
4. Click **Save**.

Gather and Share ideas

How many times have you been in a requirements planning session and used a whiteboard? A whiteboard facilitates the ability to express an idea or a concept? Using drawings and text, you can convey your idea to the team. Some team members are visual and rely on drawings. Other members use descriptive lists or steps. And still others open a browser to provide examples of what they want.

Think about the numerous times you wrote "do not erase" on the whiteboard to save the concepts until you are able to capture them in a way that they can be shared with the team. Maybe you want to create a document from these whiteboard sketches so you can ask for team feedback before turning the ideas into requirements.

Borland Atlas provides the ability for project stakeholders to create virtual whiteboards where they can:

1. Capture concepts using different types of media.

2. Share concepts and collect feedback from all team members.
3. Transform and organize concepts into well-formed requirements.

Creating a Whiteboard

All projects contain a default whiteboard. You can create additional whiteboards for your project in the **Gather** perspective.

1. Click the **Gather** perspective. The **Gather** page appears.
2. Click **New Whiteboard**. The Whiteboard name field activates.
3. Type the whiteboard name in the **Whiteboard Name** box.
4. Press `Enter`. The new whiteboard appears in the **Whiteboard** list and the whiteboard is opened, ready for adding items.

Finding a Whiteboard

1. Click the **Gather** perspective. The **Gather** page appears.
2. Type the name of the whiteboard or the creator of the whiteboard in the search field. The whiteboards matching the search criteria appear in the Whiteboard list.

Filtering Concepts or Requirements

Filters can be created and saved for reuse across a project.

1. Open the Gather or Define perspective.
2. Click the **Filter** icon. The **Filter** page appears.
3. Select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
4. Select an operator from the Conditions list (i.e., begins with, equals, greater than, etc.).
5. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
6. Click **Test Filter** to run the filter one time or click **Save Filter** to save the filter for reuse.

Using Saved Filters

1. Open the Gather or Define perspective.
2. Click the **Filter** icon. The **Filter** page appears.
3. If you have saved a filter, click the filter in **Saved Filters** list and click the **Filter** icon. All results matching the filter criteria appear in the results.

Deleting a Whiteboard

Move or delete contents from the Whiteboard prior to deleting the Whiteboard.

1. Click the **Gather** perspective. The **Gather** page appears.
2. Select the Whiteboard to delete from the Whiteboard list.
3. Click **Delete**.

   You can only delete Whiteboards that are empty.

Renaming a Whiteboard

1. Click the **Gather** perspective. The **Gather** page appears.
2. Select with Whiteboard to rename
3. Double-click the selected whiteboard. The name field becomes editable.
4. Type the new name in the name field.
5. Press **Enter**.

Adding Content to Whiteboards

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a Whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Click the **Add Concept** button. The **Add Concept** dialog box appears.
4. Click the concept type to add.

   You can add pictures, videos, notes, links, and files. Default allows you to add files. File types can include Powerpoint, Word documents, pdf, etc.
5. Navigate to the file or type the location in the appropriate field.

   Notes allows you to type your stream of thought right into the Whiteboard and does not require you to navigate to a file location.

Downloading Concept Files

Some files cannot be viewed in Atlas, such as Microsoft Power Point and Excel files. You can download the files to view them.

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a Whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Double-click the concept to open it. The selected concept opens. If the file cannot be viewed within Atlas, the message `This concept can't be viewed within Borland Atlas. You can download it instead` appears.
4. Click **download it instead** to save the file. If you have the appropriate application, you can choose to open the file in the application. If you choose to save the file, the downloaded file name is saved with the original file name.

Email Concept to Inbox Whiteboard

The project administrator must create an email account and configure Atlas to connect the email account with the Inbox whiteboard.

Sometimes and idea occurs at the most inopportune times. For example, you may be out getting a cup of coffee and you sketch your idea on an napkin. You can snap an image of that napkin with your phone and email it directly to an Atlas **Inbox** whiteboard.

1. Attach image or write email and address the email to the address your project administrator created..
2. Send the email.
3. Log into Atlas.
4. Open the project.
5. Navigate to the **Gather** perspective.
6. Open the **Inbox** whiteboard. The latest email appears in the upper left corner. From here you can start a discussion, move the concept to another whiteboard, or associate it with another concept, story, or requirement.

Sharing Concepts and Collecting Feedback with Discussions

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a Whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Double-click on a concept to open it.
4. Click the **Discussions** button The **Discussions** panel appears in the right pane.
5. Type @ in the text field to open the list of team members.
6. Select the team member(s) from the list to tag them in the discussion.
7. Type a comment in the text box to start the discussion.
8. Click the **Add** button to send the discussion message. If your administrator configured email notifications, the recipient of the discussion will receive and email with the link to the concept.

Note: In order for email notification to work, all users must include their email address in their Atlas User Profile.

Relationships

Atlas uses relationships to help you understand how different items are connected. Changing an object whether it is a requirement, a whiteboard concept, or a story has implications for other elements of the project. For example, changing a requirement that has already been pushed as a story in your agile planning tool might change the scope or complexity of the story. Relationships are supported to allow you to see the connection between requirements and other related development and planning information. Linking related objects together helps to ensure that changes are implemented correctly at all levels.

Atlas provides the following relationships between:

- requirements located in the same project
- requirements and stories
- requirements and whiteboards
- requirements and whiteboard concepts
- requirements and hub items
- whiteboards and stories
- whiteboard concepts and stories
- whiteboard concepts located in different whiteboards
- whiteboard concepts and hub items

You can create relationships manually in Atlas through the Relationships tab in the Requirements editor or on QuickLook dialogs. QuickLook is not available for hub items. Hub items are located in the **Other** tab. Hub items include Agile planning, testing, defect tracking and Microsoft Office tools.

Atlas also creates some relationships automatically for you. Whenever you push requirements to the backlog in your agile planning tool, Atlas creates a relationship between the requirement and the story it creates on the backlog. You can also relate a requirement to a story that already exists. As well as helping you understand the relationship between the requirement and the story, Atlas also uses the relationship to track the progress of the story.

Associating a Concept with an Existing Requirement

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a Whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Click the concept. The actions toolbar appears.

4. Click the **Manage Relationships** button. The **Relationships** dialog appears.
5. In **Add Relationships**, click the tab for the item type. The list of items appear.
6. Optional: Type the name of the requirement, story, or concept in the **Find** field.
7. Double-click, drag and drop, click the plus, or click **Add** for the item from the results list. The item appears in **Existing Relationships**.

Viewing Status and Details of Relationship Items

You can view that status or detail of an item with a relationship. Atlas items display status of requirement or story. Borland Hub items display according to the defaults or, in the case of custom hub items, according to what the administrator created.

The items display as follows:

Icon	Type	Status
	Requirement	Status: {Status}
	Whiteboard	Concepts: {ConceptCount}
	Story	Status : { Status}
	Change Request	Status: {Status}
	File	File Size: {FileSize}
	Plan	Start Date: {StartDate} End Date: {EndDate}
	Sprint	Start Date: {StartDate} End Date: {EndDate}
	Task	Status: {Status}
	User Defined Type	Custom according to administrator setting in the Borland Hub

1. Open the **Relationship** tab from either a concept or a requirement. The relationship pane appears.
2. Scroll through the **Existing Relationships**. Below each relationship, the status or details are listed.

Transforming Concepts into Requirements

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Click the title of the concept from within the whiteboard. A toolbar appears.
4. Click **Relationships**. The **Relationships** dialog appears.
5. Click **New Requirement**. The **Create Requirement** dialog appears.
6. Select a requirement type from the list.
7. Type the requirement name in the **Name** field.

8. Click **Save & Close**.

Importing a Concept to Create a Requirement

If your concept is a Microsoft Word .docx document, you can import the concept to create a requirement. Atlas reads a Word document and creates requirement names from headings. The text directly beneath headings is converted into the requirement descriptions. Hierarchies are not preserved from importing from headings to requirements.

1. Click the **Gather** perspective. The **Gather** page appears.
2. Choose a whiteboard from the **Whiteboard** list. The selected whiteboard opens.
3. Click the title of the concept from within the whiteboard. A toolbar appears.
4. Click **Manage Relationships**. The **Relationships** dialog appears.
5. Click the **Import** tab.
6. Click **Generate**.

Define and Scope Your Requirements

- What is your project about?
- What are the expected results?
- How many different stakeholders are going to be involved in the project?
- How much information each of those stakeholders need so they can understand what they have to do?

The answers to all these questions are captured and managed through Requirements.

Requirements are a way to express an idea about or a change to an application so the people involved in planning, building, testing, delivering, maintaining and using it can clearly understand what needs to be developed or executed.

For example, on a software development team, the team is comprised of multi-functional members. Each role in that team has a different set of informational needs. Communication is essential to successfully deliver what's expected from each member.

How many times have you received the requirements for a new application in a word document with rambling thoughts?

Atlas provides the ability for project stakeholders to:

- Organize requirements within different types
- Better understand a requirement through related concepts
- Share and collect feedback from other people
- Send requirements into the delivery backlog

Creating a Requirement

The administrator must have associated Requirement Types with the project before you can create requirements.

1. Click **Define**. The **Define** page opens.
2. Click **New Requirement**.

   To create a child requirement, select the requirement in the list, and click **New Requirement**.To create the requirement below or above a requirement in the list, select the requirement in the list, and click the arrow next to **New Requirement** . Choose **Above** or **Below** from the menu.

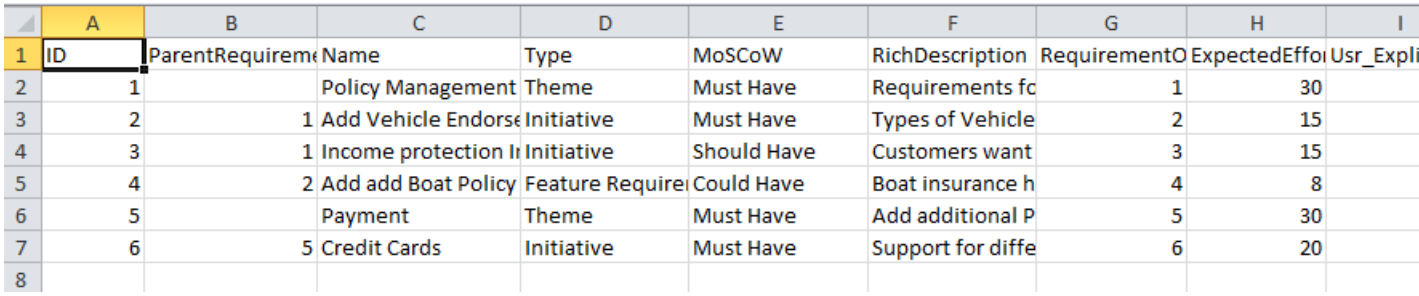
   The **Create Requirement** dialog box appears.

3. Choose a requirement type from the list.
4. Type a title for the requirement in the **Title** field.
5. To continue adding requirements, press `Enter`. The **Create Requirement** dialog remains open and ready for the next requirement.
6. Click **Save and Close** to save the requirement and close the dialog or **Save and New** to save the requirement and leave the dialog open to create another requirement.

Importing a CSV File to Create a Requirement

If your file is a .csv document, you can import the file to create requirements.

Atlas reads a .csv file and creates requirement names from the file. The .csv has to be in the appropriate format for Atlas to parse the information correctly. The headers names must match exactly to the StarTeam headings. The following image is an example of the proper .csv format.



	A	B	C	D	E	F	G	H	I
1	ID	ParentRequireme	Name	Type	MoSCoW	RichDescription	RequirementO	ExpectedEffo	Usr_Expli
2	1		Policy Management	Theme	Must Have	Requirements fc	1	30	
3	2	1	Add Vehicle Endorse	Initiative	Must Have	Types of Vehicle	2	15	
4	3	1	Income protection I	Initiative	Should Have	Customers want	3	15	
5	4	2	Add add Boat Policy	Feature Require	Could Have	Boat insurance h	4	8	
6	5		Payment	Theme	Must Have	Add additional P	5	30	
7	6	5	Credit Cards	Initiative	Must Have	Support for diffe	6	20	
8									

Items with a parent ID are created as children of the items with the same ID. Using the example image, items with parentID of `1`, `Add Vehicle Endorsement Types` and `Income protection Insurance`, are created under `Policy Management`.

1. Click the **Define** perspective. The **Define** page appears.
2. Click the **Import/Export** icon and select **Import** from the menu.. The **Import Requirements** dialog appears.
3. Click **Select** and navigate to the file to import.
4. Click **Import**. The information from the file is converted into requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

Exporting to a CSV File

You can export requirements into a CSV file in order to create your own documents for presentations or reports. You can also use the export to then import the requirements into a different project.

1. Click the **Define** perspective. The **Define** page appears.
2. Navigate to the requirements you would like to export.
3. Click the **Import/Export** icon and select **export** from the menu.. The requirements are exported to a CSV file in the default download directory of your browser. For example: `C:\Users\{userid}\Downloads`. The columns in the CSV match the order of the Requirement Grid.

Importing a Word Document to Create Requirements

If your file is a .docx document, you can import the file to create requirements.

Atlas reads a .docx file and creates requirement names from the file. The .docx has to be in the appropriate format for Atlas to parse the information correctly. Heading 2 becomes the requirement name. URLs are carried into the requirement and are fully functional. However, bullets, multiple columns, bold, italics, and indenting are flattened in the description of the requirement.

Below is an example of a well-formed Word document:

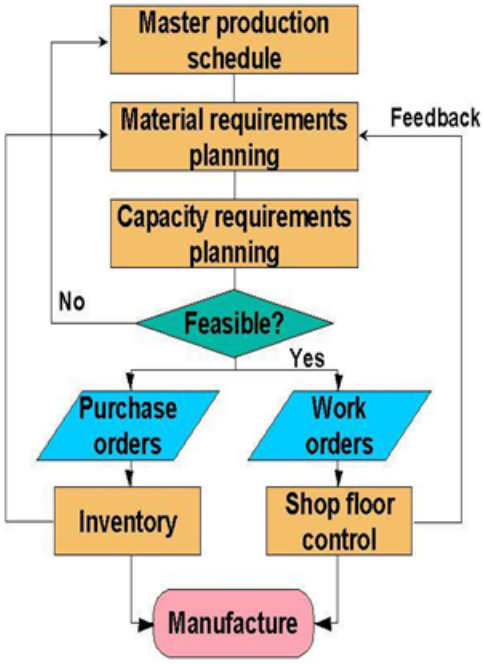
Material Requirements Planning (MRP)

Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the **bridge between master planning and production**. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).

Participants analyze the sources of information needed to perform MRP and discuss the steps in **developing, accepting and executing a material requirements plan**. The hands-on exercise reinforces the understanding of the MRP logic.

The course covers

- Planning hierarchy
  - Sales and Operations Planning (S&OP)
  - Resource Planning
  - Master Production Schedule (MPS)
  - Rough Cut Capacity Planning
  - Material Requirements Planning (MRP)
  - Capacity Requirements Planning (CRP)
  - Order release
  - Input/output controle
  - Feedback (close loop)
- Input for MRP
  - Item master data
  - Lotsize parameters: LFL, POQ, EOQ
  - Planning parameters and planning cycle
  - Bill of Material
  - Routings
  - Planning BOM
  - Safety stock and customer service
  - Forecast and demand managemen
- MRP logic



When imported into Atlas, the requirement is created as follows:

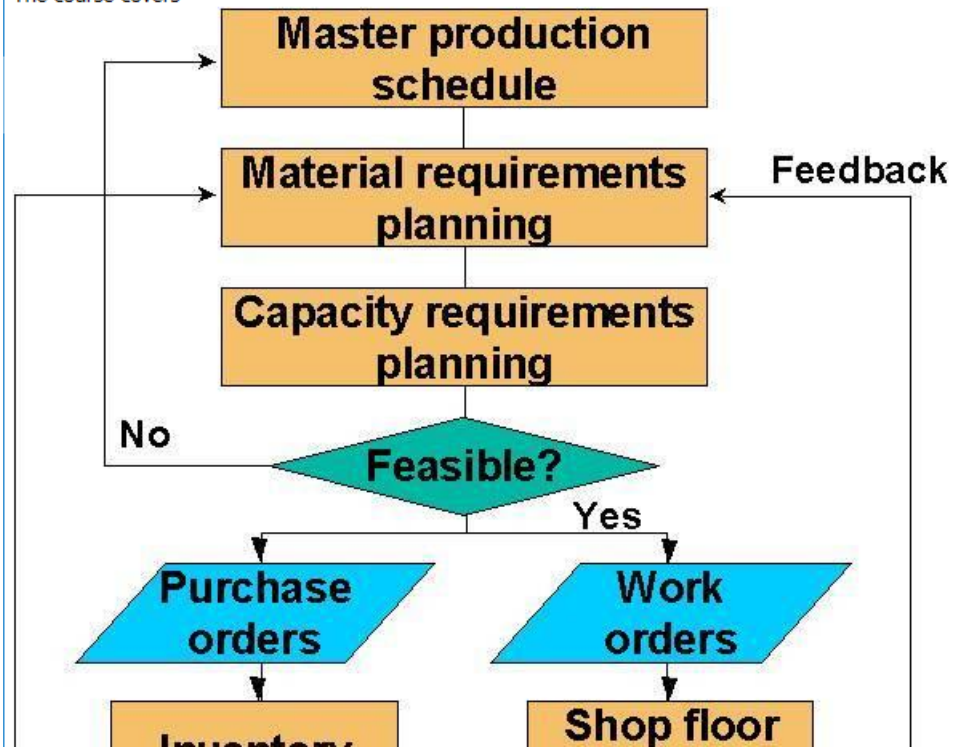
Material Requirements Planning (MRP)

Owner: Not Assigned	**ID:** 4147	Status:	
Type: Customer Story	**Revision:** 1.0	**Draft**	
Priority: Could Have	**Modified:** Jun 1, 2015, 12:07 pm	**Rank:** 999	**Estimate:** 0

To begin editing this requirement,
double-click its description or click on the field you'd like to change.

Delivery Status
Not Shared

Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the bridge between master planning and production. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).
Participants analyze the sources of information needed to perform MRP and discuss the steps in developing, accepting and executing a material requirements plan. The hands-on exercise reinforces the understanding of the MRP logic.
The course covers



Note that the bold text is now in a standard font. Additionally, the graphic is dropped below the paragraph instead of aligned in a second column next to the text. If you were to scroll further down, the bulleted text will appear on one level with no bullet points in front of the text items, as follows:

To import a .docx file:

1. Click the **Define** perspective. The **Define** page appears.
2. Click the **Import/Export** icon and select **Import** from the menu.. The **Import Requirements** dialog appears.
3. Click **Select** and navigate to the file to import.
4. Click **Import**. The information from the file is converted into requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

Finding a Requirement

1. Click the **Define** perspective. The **Define** page appears.
2. Type the name of the requirement or the creator of the requirement in the search field. The requirements matching the search criteria appear in the **Requirement** list.

Breaking Down a Requirement

Atlas supports hierarchies for organizing requirements. After you have created parent requirements, you can add child requirements to refine and organize.

1. Click **Define**. The **Define** page opens.
2. Select a requirement from the **Requirement** list. The action icon appears to the right of the requirement.
3. Click the action icon and choose **Breakdown**. The **New Requirement** dialog appears.
4. Choose a requirement type from the list.
5. Type a title for the requirement in the **Title** field.
6. To continue adding requirements, press `Enter`. The **New Requirement** dialog remains open and ready for the next requirement.
7. Click **Save and New** or **Save and Close**.

Grid View

Atlas provides two different ways to view requirements: the Tree View and the Grid View. Click the appropriate icons to switch between the two views.

Use the Grid View to display requirements in and easy to edit bulk format. By default, the Grid View includes the requirement type, tag, name, status, priority, responsible users, owner and many other attributes. To customize the columns that appear, right-click in the header row and select the column you want to appear in the grid, such as user-defined attributes.

You can also select a requirement and view its description in the lower pane of the Grid View.

Double-click in a column to quickly edit the information.

Opening Requirement in Hierarchical Context from the Grid

While you are in the Grid view, you may want to quickly view a requirement in context of it's hierarchy.

1. Scroll through the requirements for the requirement you'd like to open in the tree view. As you move the cursor over the requirements, the action icons appear next to the requirement where the cursor rests.
2. Click the **Open** icon. A new tab opens to the **Tree** view with the requirement highlighted in context.

Editing a Requirement

1. Click **Define**. The **Define** page opens.
2. Select a requirement from the **Requirement** list.
3. Click the editable fields to make them active.
   The Title, Type, Rank, Priority, Estimate, and Description can be changed.

Prioritizing and sizing a requirement

1. Click the **Define** perspective. The Define page appears.
2. Click the requirement to view the details.
3. Click the field to make it active.
4. Edit the appropriate fields.

Sharing Requirements and Collecting Feedback

1. Click the **Define** perspective. The Define page appears.
2. Navigate through the requirements list to locate the requirement you would like to discuss.
3. Select the requirement.
4. Click the **Discussion** icon. The **Discussions** panel appears.
5. Type @ in the text field to open the list of team members.
6. Select the team member(s) from the list to tag them in the discussion.
7. Type a comment in the text box to start the discussion.
8. Click the **Add** button to send the discussion message. If your administrator configured email notifications, the recipient of the discussion will receive and email with the link to the requirement.

Note: In order for email notification to work, all users must include their email address in their Atlas User Profile.

Creating Tags

Use tags to associate requirements and concepts with each other. Additionally, tags make requirements easy to filter and search.

1. Click **Define**. The **Define** page opens.
2. Open an existing requirement or create a new requirement.
3. Click the **Tags** tab. The Tags panel appears.
4. Click **New Tag**. The **New Tag** dialog opens.
5. Type a name for the tag and click **Save**. The new tag appears in the tag list.

Transforming Requirements into Stories

The best option is the send requirements into plans using the **Plan** perspective. This allows you to estimate the size of your project, plans, and iterations. However, you can also send your requirements to backlogs.

1. Click the **Define** perspective. The Define page appears.
2. Navigate through the requirements list to locate the requirement you would like to transform.
3. Click the menu icon next to the requirement. The menu appears.
4. Choose **Send to delivery backlog**. This menu item is only available if there is an estimated size value greater than zero. The **Create Story** dialog appears.
5. Type a name for the story.
6. Type a description.
7. Click **Create**.

   A link back to Atlas is generated and added to each story created from a requirement.

Viewing Requirement History

A history record for each requirement is maintained. The history record assigns revision numbers and keeps a list of when the change was made and who made the change.

To view the history of a requirement:

1. Open the **Define** perspective.
2. Select the requirement from the **Requirement** list.
3. Click the **History** tab. The **History** panel appears. Each entry in the revisions list contains the following fields:
   - **Version:** When a change is made, the revision number is automatically updated. The change may cause a major or minor revision number change. An administrator determines this when attributes types are defined.
   - **Modified Time:** The date and time the change was made.
   - **Modified By:** The name of the person who made the change.
4. Click the appropriate header to sort the revision list in ascending order by revision number, date/time, or user.
5. Click the header a second time to sort in descending order.
6. Click a revision to view it.

Viewing Requirement Status

You can view a plan's status in the **Track** perspective. However, you may only be interested in a single requirement's status. You can view a per requirement status from the **Define** perspective.

To view a requirement status:

1. Open the **Define** perspective.
2. Select the requirement from the **Requirement** list.

   A pie chart displaying the status of the requirement within the Agile project is included in the requirements details. The data includes the detail for child requirements.
3. Click the **Track** tab. The Track details opens. You can view more detailed information about the requirement status within this tab.

Plan Your Requirements

Business stakeholders capture and refine requirements until they reach a point where they believe they have enough information to fulfill their product vision.

No matter how good the vision for a product is, business stakeholders have to clearly understand their delivery capacity so they can perform high level estimates and prioritize what is the minimal feature set that is required in order to get their product delivered within a given time frame

Currently, when it comes to software development, Agile is the approach of choice for development teams around the world. Agile is based on fairly simple planning concepts that allow development teams to:

- Clearly understand the priority of features that are developed and delivered.
- Keep a consistent way of estimating effort to get features delivered.
- Easily understand how much the team is able to deliver (velocity) within a given time frame (iteration).

Atlas gives project stakeholders the ability to quickly:

- Prioritize and estimate their requirements.
- Automatically gather Agile planning information (velocity and iteration duration).
- Send requirements as stories into their Agile Teams backlog regardless of the Agile tool they are using.

Creating a Plan

1. Click the **Plan** perspective. The Plan page opens.
2. Click **New Plan**. The **Editing Plan** dialog appears.
3. Type a name for the plan, start date, target date for delivery, and weekly capacity in the appropriate fields.
4. Select requirements from the **Available Requirements** column and drag them to the **Planned Requirements** column.

   As you add requirements to the **Planned Requirements** column, Atlas tracks the size versus available capacity in the **Currently in this plan** field to help your planning capacity.
5. Click **Save** to save the plan for later editing or **send to delivery backlog** to send the plan to the backlog.

Editing a Plan

1. Click the **Plan** perspective. The Plan page opens.
2. Click the **Edit** icon located in the **Edit** column next to the plan. The **Editing Plan** dialog appears.
3. Make your updates to the fields.
4. Drag and drop requirements into the order you want within the **Planned Requirement** column.
5. Click **Save** to save the plan for later editing or **send to delivery backlog** to send the plan to the backlog.

Reviewing a Plan

1. Click the **Plan** perspective. The Plan page opens.
2. Select a requirement to add a discussion or reply to a discussion.

   If you select the root item of the tree structure, you can use the **Discussions** field to discuss the plan. The root item is selected by default when opening a **Review Plan** dialog and when filtering the plan list.

   The description for the user story or requirement you select displays in the bottom pane.
3. Type your message in the Discussion field.
4. Click **Send**.

Opening a Requirement from a Plan

1. Click the **Plan** perspective. The Plan page opens.
2. Hover over the requirement to view. The **Go To** icon appears next to the requirement.
3. Click the **Go To** icon. The requirement opens in a new tab.

Sending requirements to delivery backlogs

After you have refined your iteration plans to fit within the release time frame, you can send the requirements to the delivery backlog.

1. Click the **Plan** perspective. The Plan page appears with a flat list of all the plans for the project.
2. Double-click the plan to send to the backlog. The plan appears.
3. Click **Send to delivery backlog** to send to backlog. Atlas publishes requirements as stories in the backlog and changes the status of the plan to **committed**. Additionally, a link back to Atlas is generated and added to each story created from a requirement.

Deleting a Plan

1. Click the **Plan** perspective. The Plan page opens.
2. Select the plan to delete from the **Plan** list.
3. Click the **Delete** icon next to the plan. The plan is deleted from the project.

Track Progress

After a plan is set, the development team plans sprints through their backlog and builds and delivers your product in iterations. This approach allows the business stakeholder to review and refine your priorities as they progress.

The business stakeholder can review and refine requirement priorities. Afterward, the agile team breaks down requirements into multiple small sets of stories. Priorities can be shuffled and re-shuffled within the backlog and allocated and delivered within sprints every 2 to 3 weeks.

Business stakeholders can track the delivery progress of their requirements no matter how scattered and broken down the stories become.

The Track perspective in Atlas enables project stakeholders to quickly:

- Understand the total payload of a requirement based on the actual estimates from their agile teams.
- Check the delivery progress of a requirement based on the progress of the stories being delivered by agile teams.

- View the total plan delivery status.

Understanding Agile Delivery At-A-Glance

1. Click the **Track** perspective. The **Track** page appears.
2. Locate the plan you would like to review in the **Plan** list. The status bar appears along the right of the plan. The chart is colored using the green, yellow, red status indicators. Data from any child requirements or stories are included in the status.
3. Double-click the plan to review status in more detail.
4. Optional: Click the **i** next to the **Quick Filter** to view the chart legend. The chart legend appears below the plan list. Click the **x** above the legend or the **i** to close the legend.

Tracking Requirement Progress

1. Click the **Track** perspective. The **Track** page appears.
2. Double-click a plan from the **Plan** list. The **Tracking** dialog appears.
3. Click the expander icon next to the requirements to view the breakdown. Click the **i** next to the **Quick Filter** to view the chart legend. The legend describes the icon status meaning. The Gantt chart displays the status as related to the delivery date. Click the **Legend** button to open or close the legend.

   You can use your **Quick Filters** to quickly find the requirement you would like to view. Click the **Quick Filters** list and select the filter.
4. Click the **Quick Look** icon to view individual requirement details. The requirement details dialog appears with tabs to view Discussions, Relationships, History, and Details.

Viewing Past States

While viewing a current version of a plan or requirements, you might want to look at the past status for understanding of changes and progress. Use the Time Machine to view a plan's status or requirements from a past date.

1. Click the **Time Machine** button located next to the information button at the top right. A drop down appears with task options and saved labels.
2. Chose Pick Date and Time to select a date.
3. Select a past date in the calendar from when the plan was create to just before the current date and click **Apply**. The top bar turns grey to indicate that you are viewing content in Time Machine.
4. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

Creating a new label in Borland Hub

As you review a plans historic status and compare it to the current status, you may find you want to save it to view at a later time.

To save the view:

1. View a past view using the **Time Machine**.
2. Click the **Time Machine** icon and choose **Save**. The **Save** dialog appears.
3. Type a name for the saved label.
4. Type a description for the saved label.
5. Click **Save**.

Editing Borland Hub View Labels

1. Click the **Time Machine** icon and choose **Manage Labels**. The **Manage Labels** dialog appears.
2. Type a new name for the saved view.
3. Add more detail or type a new description for the saved view.
4. Click **Save**.

Viewing Past Status Based on Borland Hub Label

To view a past status based on a label created in Borland Hub:

1. Click the **Time Machine** button located next to the information button at the top right. A drop down appears with task options and saved labels.
2. Chose a label from the list. The top bar turns grey to indicate that you are viewing content in Time Machine.
3. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

Viewing Past State of Plan in Track Perspective

Within a plan in the Track perspective, you can view a comparison of the current status with a past status.

1. Click the **Track** perspective. The **Track** page appears.
2. Locate the plan you would like to review in the **Plan** list.
3. Select a label from the **Historic Data** list or click the **Time Machine** button and select a date. The status bars appear for both states, offering an at a glance comparison between the current and past date.

Viewing Versions

Atlas tracks the changes made to whiteboards and requirements.

1. Open the appropriate perspective.
2. Open the whiteboard or requirement.
3. Click the **Version** tab.
4. Select the version you want to view. The selected version appears in the dialog.

Search

To search for items across all of Atlas, use the Search feature. To access search, click Search found at the bottom of all the listed perspectives.

Use the **All** tab to search across all of Atlas, or click the tab for the specific area you want to search.

Type the name or part of the name you want to search, and click **Search**.

To the right of each search result, there is an icon for **Quick Look** and **Go To**:

- **Quick Look**: view details about an item in your search results. Quick Look does not switch you to another project.

- **Go To**: jump to an item in your search results. If an item is in a different project, Atlas switches your context to the other project as long as you have permission to view it. When you go to a story, Atlas opens a new window for the external URL for the tool that you use for Agile, such as Star Team Agile, Rally, Jira, etc.

  Note: Go To is not be available for some search results if Atlas has not been integrated with the tool.

Quick Filters

One way to quickly find requirements is to use Quick Filters.

You can use your **Quick Filters** to quickly find the item you would like to view. Click the **Quick Filters** list and select the filter.

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