

**Borland®**

**Atlas 2.1**

**Atlas Help**

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# Contents

<b>Atlas 2.1 Help</b>	<b>5</b>
About Atlas	6
What's New	6
Version 2.1	6
Getting Started	7
Agile Requirements Management	8
How Projects Are Organized	8
Using Atlas	9
Relationships	9
Administration	10
Setting Default Save Location for Stories	11
Setting Default Requirement Values	11
Setting Default Requirement Types for a Project	12
Setting Project Access Rights	12
Defining Requirement Types	13
Defining User Defined Attributes	13
Organizing User Defined Attributes	14
Managing Users	14
Accessing Borland Connect	15
Home	15
Working with Projects	15
Creating Reports	16
Replying to Discussions	21
Editing Your Profile	21
Gather and Share ideas	21
Using Whiteboards	22
Working with Concepts	23
Creating a Filter	25
Define and Scope Your Requirement	25
Creating a Requirement	26
Editing a Requirement	26
Breaking Down a Requirement	26
Prioritizing and Sizing a Requirement	27
Using Discussion with Requirements	27
Importing and Exporting Requirements	27
Creating Tags	31
Saving a Requirement as a Story	31
Viewing Requirement Versions	32
Comparing Versions of a Requirement	32
Comparing Versions of a Story	32
Viewing Requirement Status	33
Finding a Requirement	33
Plan Your Requirements	33
Creating a Plan	34
Editing a Plan	34
Reviewing a Plan	34
Opening a Requirement from a Plan	34
Sending Requirements to Delivery Backlogs	35
Deleting a Plan	35
Track Progress	35
Understanding Agile Delivery At-A-Glance	35

Tracking Requirement Type Progress .....	35
Viewing Past States .....	36
Creating a Label .....	36
Editing Labels .....	36
Viewing Past Status Based on a Label .....	36
Viewing Past State of Plan in Track Perspective .....	37
Viewing Versions .....	37
Search .....	37
Quick Filters .....	37

# Atlas 2.1 Help

Welcome to Atlas - The collaborative, flexible, agile requirements and delivery platform.



**What's New** - Check out the new features we have for you:

**Web-Based Training** - Use the following link to order the new, free Atlas web-based training. Order it [here!](#)

**Compare** - You can compare versions of Requirements, Stories, and Whiteboards.

**Cross-Project Relationships** - Relationship management has been extended to provide the ability to create relationships across projects. This enables users to accurately represent the complex dependencies that exist in large projects.

**Tracking Time Machine Difference Identification** - The **Time Machine** allows users to view delivery status at an historic plan date/time. The newly added **Difference** view enables users to understand date and scope changes quickly and in detail.

**Preserve Microsoft Word Format During Import** - When importing Microsoft Word documents as requirements, Atlas preserves tables, bulleted and ordered lists, font colors, and formatting.

**Report Generation** - A Microsoft Word-based report generation capability that allows for the creation of detailed requirement, plan and tracking reports. Report scope can be narrowed down using either filters or generated for full projects. Each report can optionally include Attributes, Relationships, Tags, Discussions and Delivery Tracking data.

**Requirement Authoring Improvements** - With this release, there are several usability improvement with Requirement authoring, including: (1) Improved image resizing, (2) Drag and drop images within the Requirement Editor, (3) Paste images directly in Google Chrome, (4) Indicate spelling errors for misspelled words, and (5) Press Ctrl+Click on the misspelled word to enable the built in browser context menu with spelling suggestions.



**What's New** - Check out the new features we have for you:

[Web-Based Training](#)  
[Compare](#)  
[Cross Project Relationships](#)  
[Tracking Time Machine Difference Identification](#)

[Preserve Microsoft Word Format When Importing Reporting Generation](#)  
[Requirement Authoring Improvements](#)



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[Ideas](#)

[Define and Scope Your Requirements](#)  
[Plan Your Requirements](#)  
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[Atlas on the Community](#)  
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## 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](#).

## What's New

The following is a list of new features in this release of Atlas.

### Version 2.1

#### Web-Based Training

Use the following link to order the new, free Atlas web-based training. Order it [here!](#)

#### Compare

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

You can compare versions of Requirements, Stories, and Whiteboards.

## Preserve Microsoft Word Format When Importing

When importing Microsoft Word documents as requirements, Atlas preserves tables, bulleted and ordered lists, font colors, and formatting.

## Requirement Authoring Improvements

With this release, there are several usability improvement with Requirement authoring, including: (1) Improved image resizing, (2) Drag and drop images within the Requirement Editor, (3) Paste images directly in Google Chrome, (4) Indicate spelling errors for misspelled words, and (5) Press Ctrl+Click on the misspelled word to enable the built in browser context menu with spelling suggestions.

## Report Generation

A Microsoft Word-based report generation capability that allows for the creation of detailed requirement, plan and tracking reports. Report scope can be narrowed down using either filters or generated for full projects. Each report can optionally include Attributes, Relationships, Tags, Discussions and Delivery Tracking data.

## Cross Project Relationships

Relationship management has been extended to provide the ability to create relationships across projects. This enables users to accurately represent the complex dependencies that exist in large projects.

## Time Machine Difference Identification

The **Time Machine** allows users to view delivery status at an historic plan date/time. The newly added **Difference** view enables users to understand date and scope changes quickly and in detail.

# 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 Requirement.
- 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** - 

# Agile Requirements Management

<b>Requirements Management</b>	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.
<b>Agile Requirements</b>	<p>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.</p> <p>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.</p> <p>Atlas, with its Requirement management, Whiteboards, and Plan development, is a perfect tool to use in an Agile environment. Integrating with Agile tools enables project managers to link Requirements to 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 <b>Status</b> tab or <b>Track</b> perspective, whether a change to a Requirement will negatively impact the delivery dates.</p> <p>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.</p>

## How Projects Are Organized

Before you start using 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.

<b>Projects</b>	Atlas stores Requirements in Projects. Projects stored in the same server share a common set of properties (Requirement Type, Attributes, security profiles, users, and groups).
<b>Requirement Types</b>	<p>Atlas organizes Requirements by type. A Requirement Type defines a logical grouping of Requirement that share common Attributes.</p> <p>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.</p>
<b>Requirements</b>	<p>Requirements are the primary artifact in Atlas.</p> <p>The primary means to view Requirements include the <b>Requirement Tree</b> and the <b>Requirement Grid</b>. You can toggle between the two by clicking the corresponding icon in the <b>Define</b> perspective.</p>

# Using Atlas

Your Atlas administrator has installed and configured Atlas and has provided you with a 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 Types.
  - c) Set up User Defined Attributes.
  - d) Optional: upload ideas to a Whiteboard.
  - e) Create Requirements for the Project. You can create Requirements or convert Concepts into Requirements. You can also setup relationships between Whiteboards and Requirements 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 Requirement to Agile Backlog.
  - a) Optional: Add additional Requirement to a previously pushed plan.
  - b) Optional: Re-send an updated Requirement.
  - c) Optional: Re-send 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.

## Relationships

Atlas uses Relationships to help you understand how different items are connected. Changing an object, whether it is a Requirement, a Concept, or a Story, has implications on 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:

- Requirements located in the same or different Projects.
- Requirements and Stories.
- Requirements and Whiteboards.
- Requirements and Concepts.
- Requirements and Borland Hub items.
- Whiteboards and Stories.
- Concepts and Stories.
- Concepts located in different Whiteboards.
- Concept and Borland Hub items.

You can create relationships manually in Atlas through the **Relationships** tab in the **Requirement** editor or on **QuickLook** dialogs. **QuickLook** is not available for Borland Hub items. Borland Hub items are located in the **Other** tab. Borland 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.

## Viewing Status and Details of Relationship Items

You can view the status or detail of an item with a Relationship. Atlas items display status of Requirement Type or Story. Borland Hub items display according to the defaults or, in the case of custom Borland Hub items, according to what the administrator created.

The items display as follows:

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

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

## Administration

Atlas has two levels of system administration: Server administration and Project administration. The **Administrator Tools** contains tabs allowing both administrators to manage Atlas data.

The tab group on the left is specific to Project administrators. Project administrators can only manage items in these tabs. These include Project default values, Requirement Types, and project access.

The tab group on the right is specific to Server administrators. Only Server administrators can access these tabs. Additionally, Server administrators have Project administrator rights. Server administrators manage specific settings including defining Requirement Types, User Defined Attributes, users, and also configuring Borland Connect.

Administrators click the **Admin Tools** button on **Home** to open the **Administrator Tools** window.

## Setting Default Save Location for Stories



**Note:** This procedure can only be performed by Project administrators.

Project administrators can use the following procedure to determine where Stories are saved by default.



**Important:** This is a per-Project option and must be set for each new Project.

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Defaults** tab.
6. Click **Agile Integration**.
7. Select one:

**Root of Backlog** When Requirements are pushed from the **Define** or **Plan** perspectives, they appear at the top level of the Agile Backlog.

**Under existing Story** When Requirements are pushed from the **Define** or **Plan** perspectives, they appear nested under the selected Story. After selecting this option, choose the parent Story.

8. Click **Save**.

## Setting Default Requirement Values



**Note:** This procedure can only be performed by Project administrators.

Project administrators can set default values for **Rank**, **Estimate**, **Status**, and **Priority**.

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Defaults** tab.
6. Click **Workflow**. The default options appear.
7. For **Rank**, enter an integer value
8. For **Estimate**, enter an integer value.
9. For **Status**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.
10. For **Priority**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.

## 11. Click **Save**.

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

# Setting Default Requirement Types for a Project

 **Note:** This procedure can only be performed by Project administrators.

The Project administrator can set the available Requirement Types for the Project using the steps below.

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Project Req Types**.
6. The available Requirement Types appear in the list on the right. The **Associated Requirement Types** for the Project are on the left. Hover over a Requirement Type in the **Available Requirement Types** list and click the **+** to add it to the **Associated Requirement Types** list.

# Setting Project Access Rights

 **Note:** This procedure can only be performed by Project administrators.

Project administrators can add/remove users from Projects based on role. Atlas provides the following roles:

- Viewer** A *Viewer* can see the Project in the list of Projects, can add it as a favourite, and view all of its assets. *Viewers* can't edit or delete assets. *Viewers* can perform operations such as generating reports, but generally they can't change the data or the configuration of the Project.
- Contributor** A *Contributor* can do everything a *Viewer* can do plus they can edit the Project data. That means they can modify and delete Requirements, Concepts, etc. They cannot modify the configuration of the Project (no access to **Admin Tools**).
- Administrator** A project *Administrator* can do everything a *Contributor* can, plus they can modify Project configuration via the **Admin Tools**.

 **Note:** A *Project administrator* is not the same thing as a *Server administrator*. In order to be a *Server administrator*, another *Server administrator* needs to apply *Server Administrator* permissions to that user in the **Privileges** group of the **Users** tab. See [Managing Users](#).

1. Log in with Project administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Project Access Rights**.
6. Click either the **Viewers**, **Contributors**, or **Administrators** buttons. The list of users with that role in the Project is displayed.
7. To add a user with that role, hover over a user in the **Available Users** list and then click **+**. The user is added to the Project in the role that you selected.



**Tip:** Click **Make Public** (next to the roles) to remove all users from roles in the Project. Doing this will give each user access to the Project as a *Contributor*. However, only users with *Server administrator* credentials can manage the Project.

## Defining Requirement Types



**Note:** This procedure can only be performed by Server administrators.

Atlas organizes requirements by type. A Requirement Type defines a logical grouping of requirements that will share common User Defined Attributes.

The key properties of a Requirement Type are:

- A name (displayed in the Requirement tree).
- 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.

Server administrators can follow the steps below to create and modify Requirement Types.

After creating them, associate User Defined Attribute Groups with the Requirement Type.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Define Req Types** tab.
6. If you want to create a new Requirement Type, click **New Requirement Type** and then add a name.
7. Select a Requirement Type in the **Define and Configure Requirement Types** list. The Requirement Type is opened on the right in the **Configure** section.
8. Add/remove User Defined Attribute groups using the **Available User Defined Attribute Groups** list.

## Defining User Defined Attributes



**Note:** This procedure can only be performed by Server administrators.

A User Defined Attribute allows you to create a custom field for your Requirement Type. Normally, an administrator creates and assigns User Defined Attributes while creating a Requirement Type or a Project.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Define UDAs** tab.
6. Click **New User Defined Attribute**.
7. Enter a **Name**.
8. Enter a **Display Name**.
9. Select a **Type**: *Text*, *Number*, or *List*.
10. To ensure that users enter a value, click **Required** in the **Conditions** group.
11. For the *Text* data type, enter a **Max length** value.
12. For the *Number* data type, if you want the values to roll up through the Requirement, select **Rollup Values** in the **Conditions** group.

13. For the `Number` data type, enter a **Default value**.

14. For the `List` data type, use the **Values** group to add values to the list. Enter a **Default Value** for each.

15. Click **Save**.

## Organizing User Defined Attributes

 **Note:** This procedure can only be performed by Server administrators.

You can use groups to organize how User Defined Attributes are displayed on the **Attribute** tab.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Organize UDAs** tab.
6. Click **New Group** to create a new group or select an existing group from the list.
7. Click the **+** next to the User Defined Attribute to add to the group from the **Available User Defined Attributes** list.

## Managing Users

 **Note:** This procedure can only be performed by Server administrators.

1. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click **Users**.
6. Click **New User** to add a user or select a user from the **Available Users** list and click .
7. Enter the user **Details**:
  - a) Enter a **Logon Name**. This is the name the user will use to login to the application.

 **Note:** This value is also used in Discussions as @LogonName.
  - b) Enter the user's **Password**.
  - c) Enter a **Name**. This is used as the user's display name.
  - d) Enter the user's **Email Address**.

 **Important:** In order to participate in Discussions, you must enter a valid email address. See [Sharing Requirements and Collecting Feedback](#).
  - e) Enter a **Phone Number**.
8. Enter the user **Privileges**:
  - a) Check the **Server Administrator** check box to make the user a *Server Administrator*.
9. Enter the user **Login Status**:
  - a) Check **Suspended** to lock the user out.

# Accessing Borland Connect



**Note:** This procedure can only be performed by Server administrators.

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. Log in with Server administrator credentials.
2. Click  (**Home**).
3. Choose a Project from the **Available Projects** list.
4. Click **Admin Tools**.
5. Click the **Connect** tab. The **Connect** tab opens.
6. Click **Open**. Borland Connect opens.

## Home



**Home** is your starting page where you manage Projects, generate Reports, view recent activity and, for administrators, administer the application with the **Administrator Tools**.

If you would like to open an item in your activity feed, click  (**Go to**) as you mouse over an item and Atlas will take you there.

## Working with Projects

Use the **Home** perspective () to work with Projects.

### Creating a Project

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

1. Click  (**Home**).
2. Click **New Project**. The **Create Project** dialog box appears.
3. Type the **Name** of the Project.
4. Choose the visibility option from the list.
5. Enter the **Project Description**.
6. Click **Create**.



**Tip:** To view activity on the new Project, click  (**Favorites**) next to the Project **Name**.

### Deleting a Project



**Note:** This procedure can only be performed by Project administrators.

1. Click  (**Home**).
2. Hover over the Project you want to delete.
3. Click  (**Delete**).

## Editing a Project

1. Click  (**Home**).
2. Hover over the Project you want to edit.
3. Click  (**Edit**).
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. Click  (**Home**).
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.

## Creating Reports

You can create **Requirement** Reports, **PlanReview** Reports, and **Plan Tracking** reports from the **Home** perspective. The reports are output as Word Document (DOCX) files.

**Requirement** 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. Click  (**Home**).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
4. Select **Requirements**.
5. Optional: 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 of 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 12:30  
@markho - lets talk over some of these

### Delivery Tracking Information

Delivery Status:	Not Shared
Plans:	None

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 Plan that are still being developed.

1. Click  (**Home**).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
4. Select **Plan Review**.
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 Review Report Example

The **Plan Review** Report contains a cover page and a table of 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:

#### Plan Overview

<b>Start Date:</b> May 27, 2015 BST	<b>Estimated Effort:</b> 0
<b>End Date:</b> June 23, 2015 BST	<b>Estimated Capacity:</b> 20.0
<b>Estimated Delivery Date:</b> May 27, 2015 BST	<b>Requirements:</b> 0

#### Discussions

*There are no discussions.*

The remainder of the Report lists the associated Requirements, displayed the same as in the **Requirement 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 Story data from the Agile tool as well as the Requirements information and Plan information from within Borland Atlas.

1. Click  (**Home**).
2. Choose a Project from the **Available Projects** list.
3. Click **Report**.
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 Report Report Example

The **Plan Tracking** Report contains a cover page and a table of 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 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:

ID: 2658

Type: Business Requirement

Revision: 1.0

Priority: Must Have

Modified: May 01, 2015, 10:24 AM BST



Status: Draft test

Rank: 10

Estimate: 8



### Hierarchy:

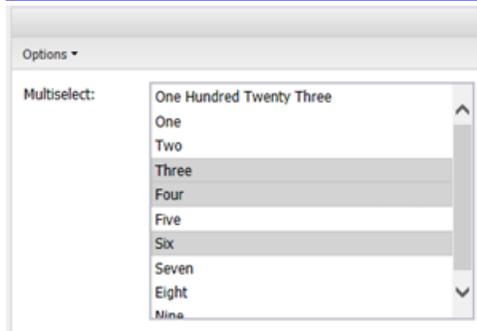
- 2550: System and User Administration
- 2649: Flexible type creation
- 2656: UDA types

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 contain 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

## 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. Click  (**Home**).
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 **Discussion** view appears.
4. Type a reply and click **Add**.

## Editing Your Profile

To edit your profile:

1. Click  (**Home**).
2. Click your user name and choose **Edit Profile**. The **Edit your profile details** dialog appears.
3. Change your **Logon Name**, **Password**, **Name**, **Email Address**, or **Phone Number**.
4. Click **Save**.

## Gather and Share ideas

Atlas provides the **Gather** perspective () for project stakeholders to create 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.

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 ideas 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.

## Using Whiteboards

Whiteboards are containers that hold Concepts. Use the topics in this section to help you work with Whiteboards.

### Creating a Whiteboard

All Projects contain a default Whiteboard but you can create additional ones for your Project.

1. Click  (**Gather**).
2. Click **New Whiteboard**.
3. Type the Whiteboard name in the field.
4. Click **Create**. The new Whiteboard appears in the **Whiteboard** list and is opened and ready for adding Concepts.

### Editing a Whiteboard

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the selected Whiteboard.
4. Type the new name.
5. Press **Enter**.

### Comparing Versions of a Whiteboard

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Whiteboard:

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click the **Versions** tab.
4. Select a version.
5. **Ctrl+click** another version. The **Compare** button is enabled.
6. Click  (**Compare**). The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, etc) and displayed in a tree list.
7. Click **Only show differences** to hide all items that haven't changed.

8. Click **Extended Attributes** to show various other fields that may have changed.

## Deleting a Whiteboard



**Note:** You need to remove all content from a Whiteboard before you can delete it.

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click **Delete**.

## Finding a Whiteboard

1. Click  (**Gather**).
2. Type the name or creator of the Whiteboard in the **Find Whiteboards** field. The Whiteboards matching the search criteria appear in the **Whiteboards** list.

## Working with Concepts

Concepts are the items that you add to Whiteboards. A Concept can be a system file, note, or a URL.

### Creating Concepts

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click  (**Add Concept**) at the bottom of the screen. The **Create Concept** dialog box appears.
4. Select one of the tabs to add that type of Concept:

**Attachment** Allows you to attach a file as a Concept. File types can include videos, documents, presentations, PDFs, and more.

Enter the **File Name**, **Title** and **Description**.

**Note** Allows you to type any text you want and include a rich description (including text, links, and images) for it.

**Link** Allows you to add a URL. Enter the **URL** address, a **Title** and **Description**.

5. Click **Add**. The Concept is added to your Whiteboard.

### Downloading Concept Files

Some types of system files cannot be viewed directly inAtlas, such as Microsoft Power Point and Excel files. You will need to download the files to view them.

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
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.

## Emailing a Concept to the Inbox Whiteboard

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

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

1. Attach an image or write an 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. Click  (**Gather**).
6. Open the Whiteboard named **Inbox**. 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.

## Using Discussions with Concepts

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the Concept to open it.
4. Click the **Discussions** tab.
5. Type @ in the **Your message...** 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 field to start the Discussion.
8. Click the **Add** button to send the message. If your administrator configured email notifications, the recipient of the Discussion will receive an email with the link to the Concept.



**Note:** In order for email notification to work, users must include their email address in their Atlas [User Profile](#).

## Creating a Relationship from a Concept

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
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**.

## Saving Concepts as Requirements

1. Click  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.

4. Click  (**Manage Relationships**).
5. Click **New Requirement**. The **Create Requirement** dialog appears.
6. Select a Requirement Type from the list.
7. 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  (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click  (**Manage Relationships**).
5. Click the **Import** tab.
6. Click **Generate**.

## Creating a Filter

Filters can be created and saved for reuse across a Project in **Gather** and **Define** perspectives.

1. Click  (**Filter**). The **Filter** area appears.
2. Select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
3. Select an operator from the **Conditions** list (i.e., `begins with`, `>=`, `>`, etc.).
4. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
5. Click **Create**.
6. You can add another level to the Filter or you can test, save, save as, or clear the Filter.

## Using Saved Filters

Filters can be created and saved for reuse across a Project in **Gather** and **Define** perspectives.

1. Click  (**Filter**). The **Filter** area appears.
2. 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.

## Define and Scope Your Requirement

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.

Atlas provides two ways to view Requirements in the **Define** () perspective:

- Tree View**  Contains the hierarchical tree view of your Requirements. You can select a Requirement in the tree and then select one of its fields to edit them.



**Tip:** In the Requirement tree, click  next to the Requirement for additional actions such as **Breakdown**, **Send to Backlog**, **Delete**, etc.

### Grid View

Use to display Requirements in an easy to edit bulk format. By default, the **Grid View** includes the Requirement Type, **Tag**, **Name**, **Status**, **Priority**, **Responsible Users**, **Owner** and 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.



**Tip:** Click  (**Tools**) as you mouse over a Requirement and select **Open** to open the item in another window.

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

## Creating a Requirement

The administrator must have associated Requirement Types with the Project before you can create Requirements.

1. Click  (**Define**).
2. Click  (**Create new Requirement**).  
To create a child Requirement, select the Requirement in the list, and click **Create new Requirement > Create Above...** or **Create new Requirement > Create Below...**  
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.

## Editing a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the editable fields to make them active.  
The **Title**, **Owner**, **Type**, **Rank**, **Priority**, **Estimate**, and **Description** can be changed.
4. Click **Save**.

## 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**).
2. Choose a Requirement from the **Requirements** list.
3. Click  (**Actions**).
4. Select **Breakdown**. The **New Requirement** dialog appears.
5. Choose a Requirement Type from the list.

6. Type a title for the Requirement in the **Title** field.
7. To continue adding Requirements, press **Enter**. The **New Requirement** dialog remains open and ready for the next Requirement.
8. Click **Save and New** or **Save and Close**.

## Prioritizing and Sizing a Requirement

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click one of the fields to active it.
4. Edit the appropriate fields.
5. Click **Save**.

## Using Discussion with Requirements

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Discussions** tab. The **Discussions** panel appears.
4. Type @ in the text field to open the list of team members.
5. Select the team member(s) from the list to tag them in the Discussion.
6. Type a comment in the text box to start the Discussion.
7. Click the **Add** button to send the Discussion message. If your administrator configured email notifications, the recipient of the Discussion will receive an 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.

## Importing and Exporting Requirements

Use the topics in this section to learn about importing and exporting Requirements.

### 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.

1. Click  (**Define**).
2. Click  (**Tools**) and select **Import**. The **Import Requirements** dialog box 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.

The following image is an example of the proper CSV format.

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

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

## 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 file has to be properly formatted for Atlas to parse the information correctly.

- Heading 2 becomes the Requirement name.
- URLs are carried into the Requirement and are fully functional.
- Bullets, multiple columns, bold, italics, and indenting are flattened in the description of the Requirement.

1. Click  (**Define**).
2. Click  (**Tools**) and select **Import**. The **Import Requirements** dialog box 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.

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

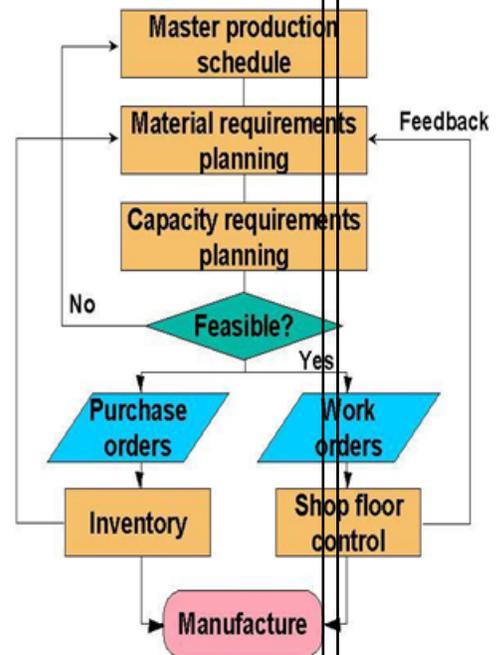
## Material Requirements Planning (MRP)

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 control
  - 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:**

**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.



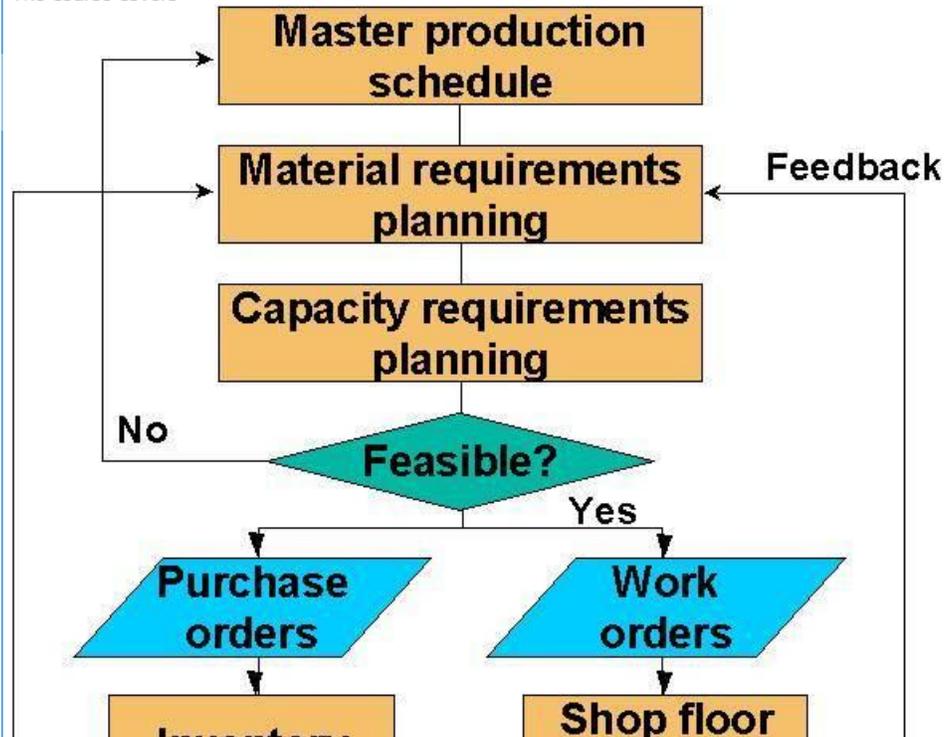
**Delivery Status**  
Not Shared



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:

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 control  
 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 management  
 MRP logic  
 Validation and uses of the MRP plan  
 On hand / available / allocation /  
 Backflushing  
 Pegging / Where used  
 Firmed planned orders  
 Cycle counting  
 Available to promise

## 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  (**Define**).
2. Select the Requirements you would like to export.
3. Click  (**Tools**) and then select **Export**. 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**.

## Creating Tags

Use Tags to associate Requirement Types and Concepts with each other. Additionally, Tags make Requirement Types easy to filter and search.

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
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.

## Saving a Requirement as a Story

The best option to save a Requirement as a Story is to 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 Requirement to backlogs.

1. Click  (**Define**).

2. Choose a Requirement from the **Requirements** list.
3. Click  (**Actions**).
4. Select **Send to delivery Backlog....** This action 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 is generated and added to each Story created from a Requirement.

## Viewing Requirement Versions

Each Requirement contains a detailed history of its versions. The history assigns version numbers and keeps a list of when the change was made and who made the change. To view the history of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab. Each version in the list contains the following fields:

**Version** When a change is made, the version number is automatically updated. The change may cause a major or minor revision number change. An administrator determines this when attribute 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. Select a version.

## Comparing Versions of a Requirement

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab.
4. Select a version.
5. **Ctrl+click** another version. The **Compare** button is enabled.
6. Click  (**Compare**). The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, etc) and displayed in a tree list.
7. Click **Only show differences** to hide all items that haven't changed.
8. Click **Extended Attributes** to show various other fields that may have changed.

## Comparing Versions of a Story

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Story:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Click the **Story** tab.
5. Click  (**Quick Look**) next to the Story.
6. Click the **Versions** tab.
7. Select a version.
8. **Ctrl+click** another version. The **Compare** button is enabled.
9. Click  (**Compare**). The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System, Description, UDAs**, etc) and displayed in a tree list.
10. Click **Only show differences** to hide all items that haven't changed.
11. Click **Extended Attributes** to show various other fields that may have changed.

## Viewing Requirement Status

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

To view the status of a Requirement:

1. Click  (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Review the status in the **Delivery Status** section. The data also includes the detail for child Requirements.



## Finding a Requirement

1. Click  (**Define**).
2. Click **Search**.
3. 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.

## 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  (Plan).
2. Click **New Plan**. The **Editing Plan** dialog box 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  (Plan).
2. Choose a Plan from the **Plan** list.
3. Click  (Edit).
4. Make your updates to the fields.
5. Drag and drop Requirements into the order you want within the **Planned Requirement** column.
6. 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  (Plan).
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 box and when filtering the Plan list.  
The description for the 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  (Plan).
2. Choose a Plan from the **Plan** list.
3. Click  (Edit).
4. Hover over the Requirement to view.
5. Click  (Go To).

## Sending Requirements to Delivery Backlogs

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

1. Click  (**Plan**).
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 Type.

## Deleting a Plan

1. Click  (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click  (**Delete**).

## 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 Requirement 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  (**Track**).
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 Requirement Types or Stories are included in the status.
3. Double-click a Plan from the **Plan** list.
4. Optional: Click  (**Info**) next to the **Filter** to view the **Legend**. The **Legend** appears below the **Plan** list. Click the **x** above the **Legend** to close it.

## Tracking Requirement Type Progress

1. Click  (**Track**).

2. Double-click a Plan from the **Plan** list.
3. On the **Tracking** dialog box, click + / - next to the Requirement Type to view the breakdown. Click  (**Info**) next to the **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  (**Quick Look**) to view individual Requirement details. The **Requirement Details** dialog box appears with tabs to view **Discussions**, **Relationships**, **InfoVersions**, and **User Defined Attributes**.

## 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  (**Time Machine**).
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 Label

As you review a Plan's past status and compare it to the current status, you may find you want to save it to view at a later time.

1. View a past view using the **Time Machine**.
2. Click  (**Time Machine**).
3. Click **Save**.
4. Type a name for the saved Label.
5. Type a description for the saved Label.
6. Click **Save**.

## Editing Labels

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

## Viewing Past Status Based on a Label

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

1. Click  (**Time Machine**).

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  (**Time Machine**) 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 most of its assets.

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

## Search

Click  (**Search**) to open the search page.

Select the button for the types that 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 are icons to use:

- |                   |   |
|-------------------|---|
| <b>Quick Look</b> | View details about an item in your search results. Quick Look does not switch you to another project.   |
| <b>Go To</b>      | 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

Use a *Quick Filter* to quickly find a Requirement.

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.

# Index

## A

- Agile tool integration 15
- Atlas
  - getting started 7

## B

- Backlog
  - Relationships 9
- Borland Connect
  - starting 15
- Borland Hub
  - Relationships 9

## C

- Change Request
  - status 10
- Concept
  - creating 23
  - creating Relationships 24
  - downloading 23
  - email to Inbox Whiteboard 24
  - filtering 25
  - import from Word 25
  - Relationships 9
  - save as Requirement 24
  - sharing in Discussion 24
  - working with 23
- creating
  - Concepts 23
  - Filters 25
  - Labels 36
  - Plans 34
  - Projects 15
  - Relationship from Concept 24
  - Requirements 26
  - Tags 31
  - Whiteboards 22
- CSV file
  - export to 31
  - import from 27

## D

- Define
  - about 25
- deleting
  - Plans 35
  - Projects 15
  - Whiteboards 23
- Discussion
  - replying 21
  - Requirement 27
  - using 24

## E

- editing
  - Labels 36
  - Projects 16
  - user profiles 21
  - Whiteboards 22

- export
  - Requirement to CSV file 31

## F

- Filter
  - creating 25
  - quick 37
  - using existing 25

## G

- Gather
  - about the perspective 21
  - getting started 9

## H

- home 15

## I

- import
  - Concept as Requirement from Word 25
  - Requirement from CSV file 27
  - Requirement from Word file 28

## L

- Label
  - creating 36
  - editing 36
  - opening 36

## P

- Plan
  - compare status between dates 37
  - create Plan 34
  - deleting 35
    - Discussion
      - reviewing a Plan 34
  - editing 34
  - opening Requirements 34
  - past version 36
  - reviewing 34
  - tracking report 18
- Plan review Report 17
- profile
  - editing 21
- Project
  - administration 10
  - creating 15
  - creating User Defined Attributes 13
  - default Requirement values 11
  - deleting 15

- editing 16
  - opening
    - Projects 16
- organization 8
- setting access rights 12
- setting default requirement types 12
- Story default save location 11

## R

- Relationship
  - about 9
  - creating from Concept 24
  - status 10
- Report
  - generating
    - Plan review 17
    - Plan tracking 18
    - Requirements 16
  - types 16
- Requirement
  - about agile 8
  - breaking down 26
    - compare
      - versions 32
  - create Plan 34
  - creating 26
  - deleting a Plan 35
    - editing
      - Requirements 26
  - editing a Plan 34
    - export
      - to CSV 31
  - filtering 25
  - finding 33
    - import
      - from CSV 27
      - from Word 28
  - opening from a Plan 34
  - past version 36
  - planning and organizing 33
  - prioritizing 27
  - Relationships 9
  - Reports 16
  - save as Story 31
  - saving from Concepts 24
  - searching 33
  - send to backlog 35
  - setting default values 11
  - sizing 27
  - tracking 35
  - tracking progress 35
  - versions 32
  - view status 33
- Requirement Type
  - defining 13
  - setting project defaults 12
- roles 12

## S

- search 37
- server administration 10

- Sprint
  - status 10
- status
  - Relationship 10
- Story
  - compare versions 32
  - default save location 11
  - Relationships 9
  - saving from Requirements 31

## T

- Tag
  - creating 31
- Task
  - status 10
- Time Machine
  - creating label 36
  - editing labels 36
  - past status 36
  - viewing status based on label 36
- track
  - Requirements 35
  - stories 35
- Track
  - compare status between dates 37
  - Plan progress 35

## U

- User Defined Attribute
  - adding groups to Requirement Types 13
  - creating 13
  - organizing 14
- users
  - adding 14
  - adding to Projects 12

## V

- versions
  - compare
    - Requirement 32
    - Story 32
    - Whiteboard 22
  - viewing 37

## W

- welcome 5
- Whiteboard
  - adding content 23
  - compare versions 22
  - creating 22
  - deleting 23
  - editing 22
  - email Concept 24
  - finding 23
  - Relationships 9
  - searching 23
  - sharing Concept via Discussions 24