Atlas 4.0

Atlas Help

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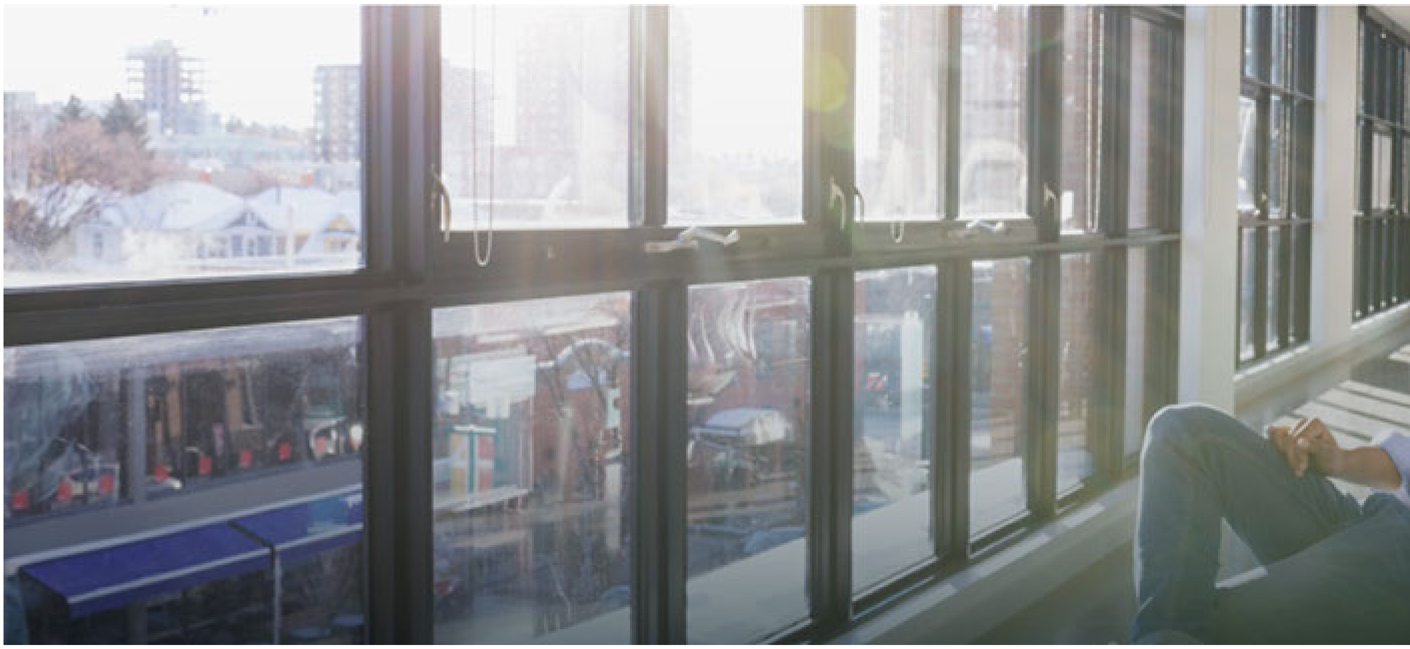
Atlas Help



Welcome to **Atlas**. This help system contains information for both **Atlas** and **Atlas Team**.

Atlas

Atlas is a web-based, lightweight Requirements tool focused on enabling business analysts, product managers, and other Project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (diagrams, work-flows, 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.

Atlas Team

Atlas Team is an agile project tracking tool designed to allow you to:

- Organize, prioritize, and manage your Agile teams' backlogs.
- Plan your sprints, task out the work, and then track progress throughout the sprint.
- Get comprehensive visibility of all your Agile assets.

What's New

Here are the new features for this release:

- *Atlas Team*
- *New Relationship Capabilities*
- *Redesigned Filter*
- *Track Requirement Progress across Projects in Gantt*

Check out the full Release Notes *here:*

- *Ability to Push Stories to Multiple Projects*

Online resources

Online Help

Find your answer by viewing the *full version* of the product help on the web.

Atlas Community

Visit our *community* for new, articles, and insight on Atlas from developers and users.

Micro Focus Support

Micro Focus SupportLine

Learning Center

Can't find what you're looking for? Head to our *Learning Center* to find all your educational needs.

Web Based Training

Micro Focus Training Store

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Atlas

About

Atlas is a web-based, lightweight Requirements tool focused on enabling business analysts, product managers, and other Project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (diagrams, work-flows, 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.

Getting Started

Find out how to hit the ground running:

Getting Started Help

Web-Based Training

Atlas videos

Featured Sections

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- *Gather and Share Ideas*
- *Define and Scope Your Requirements*
- *Plan Your Requirements*
- *Track Progress*

Watch and Learn

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- *Atlas & Email*
- *Atlas & Rally*

What's New in Atlas

4.0

Atlas Team

Atlas Team is the new delivery-focused application within the Atlas Planning and Tracking Suite allowing agile teams to breakdown and manage work delivery in agile cadence. Some features include:

- Enables definition and breakdown of program objectives into actionable stories.

- Defines/manages sprints and team releases.
- Collaborate and status with the Team Room's List and Card views.
- Tracks progress against defined dates and payloads.

Redesigned Filters

Filters now open in a separate dialog box that has been redesigned to show filters in a clear, concise, and understandable way. You can view the filter list while creating new filters and make inline edits of a selected filter. Additionally, you can duplicate an existing filter to use its criteria toward a new filter.

Track Requirement Progress across Projects in Gantt

Atlas offers a new column in the Gantt chart called Projects, enabling you to quickly view the requirement's progress across all projects. Click the Requirement to open the various associated stories and projects.

New Relationship Capabilities

Relationship types and direction can be defined through the relationship dialog boxes as you step through setting up relationships. This offers more control over the direction and type of relationship while you are creating it or editing it.

Additionally, relationships can be filtered by status in the Relationship tab.

Ability to Push Stories to Multiple Projects

Atlas now provides the ability to push stories to multiple projects. The Server Administrator creates a Delivery Projects user defined attribute, assigns projects to it, and attaches the UDA to the appropriate Requirement Type. When users push to backlog, a story is added to the projects that were selected in the Delivery Projects UDA.

3.2

Diagramming

Atlas now contains native diagramming capabilities that you can use as Concept or Requirement types. The vast *Shapes* library contains the following for standard diagrams: BPMN, UML, Flowcharts, Use Case, Lean Mapping, Process Engineering, SysML, EIP, Cisco, AWS, Azure, and more. For mockups, there are shapes for Windows Applications, Internet Applications, iOS, and Android.

Watch a video to learn how to diagram *here*.

Synchronizing Requirements

Many times the same Requirements are used for multiple Projects. Atlas provides the ability to reuse requirements by defining them once centrally, and connecting (synchronizing) them with other Projects.

Milestone Tracking

Agile teams move quickly, incrementally adding new capability sprint after sprint. The agile delivery team is dependent on requirement information to assure priorities/expectations are clearly understood upfront. When the project milestone planning (content, priority, purpose, and timing) side is not ready, the delivery team is left to make assumptions to fill in the gaps. This practice can lead to misaligned expectations and rework. Those on the business side need to align their milestone planning with the delivery team's sprints.

Atlas Requirement Date Planning enables Atlas users to define specific definition dates for features, and measure/track against those time-frames. By defining and tracking the project milestones, Atlas users can align their work with the delivery team, assuring business needs are available when requested by engineering.

Date Type User Defined Attribute

The Date Type User Defined Attribute type allows Administrators to create any date value for their projects.

New Requirement Type: Diagram

A new *Diagram* Requirement Type allows you to create diagrams instead of text descriptions for your Requirements. The Diagram Requirement Type is designated with a icon in the Requirement Tree.

3.1

This release of Atlas includes numerous performances improvements and fixes targeted at enhancing and stabilizing your experience with the Atlas platform.

3.0

Additional Report Options

You can now add or remove page breaks between Atlas artifacts like Requirements and Stories. Additionally, you can choose to include system attributes in your reports.

Testing Tool Integration

Atlas can now connect directly to your testing tool to send and synchronize Requirements. When tests occur, Atlas receives the test execution status in the context of the Requirements. To do this, an administrator will connect your testing tool to Atlas via Micro Focus Connect, and users can use the **Define** and **Track** perspectives to view test execution details.

Detailed Activity Feed

The activity feed is now organized into easy to follows sections with nesting to identify relationships. At a glance, you can view changes to your items, track status on Requirements and Stories, and view warnings that highlight items that Atlas has identified may need action.

Agree or Disagree in Discussions

With the new Agree or Disagree buttons, you no longer have to reply to a discussion to express your opinion on a topic. Quickly click (Agree) or (Disagree) button next to the user's comment. After the team has come to a resolution, contributors can close the discussions as Approved or Rejected.

Intuitive Discussions Functionality

Discussions are now organized by topic with replies nested below the associated topics. Collapsed topics contain details of last time or date updated, participant names, topic title, description, and approve or reject status. Additionally, clicking GoTo on a discussion from the Activity Feed with open the discussion in the exact position of the new item.

2.4

Hide Disabled UDAs from UDA List

With a click of a checkbox, you can now hide disabled UDAs from the UDA list in the Administrator Tool, making it easy to find the relevant UDAs for your Project.

Disabled UDAs No Longer Appear in Various Requirement Views

When disabling an UDA in the Administrator Tools, the UDA no longer appears in such areas as the Requirement Grid and the Attributes tab.

Multi-line Text UDAs

You can create multi-line text fields for a UDA. All attributes over 50 characters long will render a multi-line text box.

Multi-Select List UDAs

Administrators now have the ability to create lists with multiple selections. Choose **List - Multi Select** data type in the Administrator Tool to create the new list.

Open Requirements and Stories from the Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart. Click the icon next to the requirement or story and the item will open in a new browser tab.

Tracking Details Available in Activity Feed

When you first log in, you can quickly view tracking details on the latest changes right in your Activity feed. Plan names are displayed with the Requirement or story, as is status details, and pie chart.

Warning for Items Needing Action

Check the **Warning** checkbox in the Activity feed to find items that require action, such as items with no relationships.

Navigation within Help

Access the Atlas Online Help from anywhere in Atlas with the Information icon. Choose Atlas Context Help to open help relevant to the perspective you are currently using or access the Atlas Online Help to view all topics. The Atlas Online Help contains a table of contents, index, and search, making navigating to any topic convenient and easy.

Video Training Series Available on YouTube

View the Atlas video training series on *YouTube*.

Relationship Diagram

The new Relationship Diagram provides a graphical representation of the relationship between items, allowing you to visualize the relationships for a requirement. It displays not only the top-level relationships, but also allows you to click and follow relationships further down the hierarchy.

Define Project Specific Filters

As you interact with many Projects, you want to define filters that are Project specific. This release provides the ability to define filter specific to each Project, making you results list manageable and succinct.

View and Access Plans from Requirements Grid

The new Plan column in the Requirements Grid allows you to see if a Requirement has been added to a Plan(s). Selecting the plan from the Requirements Grid or the **Plans for Requirement** dialog, opens the plan in view mode. Additionally, you can add the Requirement to a Plan or remove the Requirement from a plan all within the **Plans for Requirement** dialog.

Quickly Save a Snapshot of a Moment in Time Machine

The new Save feature in Time Machine allows you to quickly save the moment you are viewing.

File Name Changes Visible in Compare

When comparing versions, file changes are available in the Files field of the attributes. The comparison tracks when files are added, removed, or names have changed.

Requirements Recycle Bin

Retrieve recently deleted requirements from the Recycle Bin. The Recycle Bin displays the last 50 deleted requirements. To ease your search, use **Find Requirements** or select a month and year to display only the Requirements meeting your criteria. Click the Retrieve icon to replace the requirement within the tree.

Attach Files to Requirements

You can attach any file type to your Requirement. While in the Define perspective, open your Requirement, click the Attachment tab, and browse to your file.

Historical View of Activity Feed

Choose a date to view the Activity Feed at any point in the past for that Project, allowing you to quickly view past changes.

2.2 and 2.3

Copy and Paste Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirement so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste. Requirement and Project IDs are copied, but Relationships and child Requirements do not copy and paste with the selected Requirements.

Display Search Results from Specific Projects

You can now display search results from all projects, current project, or specific projects. This provides manageable sized search results and allows you to search in projects of interest to you.

Turn Requirement IDs on or off in Tree

With a simple click of a button, you can view Requirement IDs in the Tree View.

Hyperlink Back to Atlas in Exported CSV File

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

Time Machine Difference Overview

The Time Machine in the Tracking perspective uses Atlas's version capability to allow you to view historical delivery data. The Difference Overview panel helps you quickly understand the true changes that have occurred over time across the integrated tools.

Version Compare in Activity Feed

You can now view version comparisons of Requirements and Stories on the Activity feed.

Detailed Differences in Compare

For easy identification of changes, Compare provides detailed differences highlighting description changes in color when comparing versions of Requirements and Stories.

Combined Whiteboards and Concepts in Relationships

When adding Relationships, Whiteboards and Concepts are combined on one tab. You can now see to which Whiteboard the concepts belong instead of seeing a long list of concepts.

Show Associated Plan in Requirement Deliver Status

While in a Requirement, you can quickly view the associated Plan. If there isn't an associated Plan, you can click the field and select a Plan right within the Requirement. Additionally, you can click the Plan in the Delivery Status of the Requirement and you can open it. If the requirement is in multiple plans, the Deliver Status states "Multiple." Click **Multiple** to show a menu that allows you to choose the plan to open.

Atlas Planning and Tracking Suite

Atlas, Atlas Hub, Micro Focus Connect and StarTeam Agile are now installed together as part of the new **Atlas Planning and Tracking Suite**.

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 and Stories.

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

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.

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 re-use 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. Use the **Requirement Tree** and the **Requirement Grid** to view your Requirements. You can toggle between the two by clicking the corresponding icon in the **Define** perspective.

Requirements Management in Atlas

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

Agile 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 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 **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.

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 White boards.
   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.

Using Atlas with Atlas Team

Atlas Team and Atlas are two of the main components of the Atlas Planning and Tracking Suite. You use Atlas to define, capture, and track the business needs of the organization as Requirements. You use Atlas

Team to plan, status, and track the day-to-day Agile activities of the project team. Atlas pushes Requirements into Atlas Team as Epics where the product team breaks them down into smaller consumable Stories. These Stories are then worked through the full Agile process. Daily status, state and all related tracking data is integrated back into Atlas for real-time portfolio visibility for all stakeholders.

The specific integration points are as follows:

Projects

You can create new projects in Atlas Team, but Projects are *common* between Atlas and Atlas Team so any Project created in one is available in the other. For more information, see *Working with Projects*.

Users

Important: Although Users are common between Atlas and Atlas Team, the administrator needs to set project access rights for each user. See *Setting Project Access Rights*.

Starting and Logging In

You can open Atlas Team from within Atlas (and vice-versa, see *Starting Atlas Team*), but there are other ways to start the application:

- An administrator logged into the install machine can use the **Start** menu to launch Atlas Team: **Start** > **All Programs** > **Micro Focus** > **Atlas** > **Atlas Team**.
- Other team members can navigate to: `http://<hostname>/atlas/#perspective=agile` to start Atlas Team.

Requirements

Requirements from Atlas are pushed into Atlas Team as Epics, using one of the following methods:

Individual Requirement	From the Gear menu ( ) of a Requirement, select **Send to delivery Backlog**.
Full Plans	In the Atlas **Plan** perspective, edit a plan and click **Send to delivery Backlog**.

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.

Watch how to do it: *Changing Default Values*.

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**.

Enabling Testing Tool Integration

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

Project administrators can use the following procedure to enable testing tool integration.

Note: You need to have a testing tool connector (such as the Silk Central Connector) running in Micro Focus Connect for test information to be sent to Atlas.

Watch how to do it: *Changing Default Values*.

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 **Test Integration**.
7. Click **Enabled**.
8. Use **Graph Duration (days)** to configure how long of a time span for which you want to see test results. These are displayed in the Requirement **Tracking** Tab.
9. Click **Save** and close **Admin Tools**.

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**.

Watch how to do it: *Changing Default Values*.

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.

   For Requirement definition planning dates, set the default status in the **Completed** field.
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 appears 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. By default, Diagram, Business, and Software Requirement Types are associated with projects. 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.

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. In the **View** pane, there are two sections: **Atlas** and **Atlas Team**. Each has **Viewers** and **Contributors** buttons. Click one of the 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.

Watch how to do it: *Adding New Requirement Types* and *Associating Requirement Types with 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 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.

Watch how to do it: *Creating User Defined Attributes* and *Creating Attribute Groups*.

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. Check **Hide Disabled UDAs** to reduce list size and make it easier to see if a UDA is already created.
7. Click **New User Defined Attribute.**
8. Enter a **Name**.
9. Enter a **Display Name**.
10. Select a **Type**: `Text`, `Number`, `List`, `List - multi Select`, or `Date`.
11. To enforce users to enter a value, click **Required** in the **Conditions** group.
12. Do one of the following:
    a) For the `Text` data type, enter a **Max length** value. Text attributes that are over 50 characters long will render as multi-line text. Whereas, those that are up to 50, will render as a single-line text.
    b) For the `Number` data type, if you want the values to roll up through the Requirement, select **Rollup Values** in the **Conditions** group.
    c) For the `Number` data type, enter a **Default value**.
    d) For the `List` data type, use the **Values** group to add values to the list. Enter a **Default Value** for each.
    e) For the `List - Multi Select` data type, use the **Values** group to add values to a selection list. Enter a **Default Value**.
13. Click **Save**.

Hiding User Defined Attributes

To remove a User Defined Attribute from the Attributes tab on Requirements and from the Requirement Grid column:

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. Select the UDA to disable.
7. Uncheck **Enable**. The UDA is hidden from all UDA areas of Atlas.

Enabling Functionality to Push Stories to Multiple Projects

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

In order to push a story to multiple project backlogs, create the Delivery Projects user defined attribute:

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. Create an user defined attribute named exactly `Usr_DeliveryProjects`.

8. Type `Delivery Projects` in the **Display Name** field.
9. Select **List-Multi Select** from the **Type** drop-down.
10. Add the projects where you want stories added to their backlog.
11. Click **Define Req Types** tab.
12. Select a **Requirement Type** or create a Requirement Type in which to associate the **Delivery Projects** UDA.
13. Choose **Delivery Projects** from the **Available User Defined Attribute Groups** list and add it to the Requirement Type.
14. Close the **Admin Tools**.

When a user pushes to backlog, a story is added to the projects that were selected in the **Delivery Projects** UDA.

Enabling Requirements Date Planning

By default, the Completed Date User Defined Attribute is enabled. This allows users to enter a Due Date and Completed Date for Requirements when you are not sending Requirements to an Agile tool or when you are tracking a requirement definition progress, Requirements Date Planning.

In addition to the Completed Date User Defined Attribute, you can set the default status in the workflow under the **Defaults** tab..

To enable or disable the Requirements Date Planning features:

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. Select **Completed Date**.
7. Check or un-check **Enabled**.

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.

Watch how to do it: *Creating User Defined Attributes* and *Creating Attribute Groups*.

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.

Watch how to do it: *Creating Users* and *Adding Users to 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 **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) Confirm the password.
   d) Enter a **Name**. This is used as the user's display name.
   e) 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*.

   f) 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 Micro Focus Connect

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

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

Watch how to do it:

Atlas & TFS
Atlas & JIRA

Atlas & VersionOne
Atlas & Email
Atlas & Rally

Getting Started

This topic describes how to start the Micro Focus Connect UI, and it provides an overview of the Micro Focus Connect dashboard and how it is used to configure data sources and connections, and how to run and manage synchronizations.

Starting the UI

Before starting the Micro Focus Connect UI, the Micro Focus Connect server must be running. See *Running the Micro Focus Connect Server* for more information.

1. Go to `http://<machine name>:8080/ConnectWeb/index.html`. The Micro Focus Connect login page, **Micro Focus Connect**, appears.
2. In the **Username** and **Password** fields, enter your credentials for the authenticator selected in the **Authenticator** field, and then click **Login**. The Micro Focus Connect UI appears.

Logging Out

Click the **Log out** button ().

Note: Logging out has no effect on the Micro Focus Connect server.

The Dashboard

The main page of the Micro Focus Connect UI is referred to as the *dashboard*. The dashboard consists of four main pages that are accessed via tabs:

Connections Displays a list of your installed connections and a summary of their synchronization attributes -- the connection's data source, the direction in which assets are synchronized (the default is *bi-directional*), the last time a synchronization was run, the last time a synchronization succeeded, and the current status (which can refer to either the synchronization task itself, or to the configuration that defines it).

The **Connection Details** panel shows detailed information about the currently selected connection, including information about how projects, types, fields, and relationships are mapped between your third-party system and the Atlas Hub.

Tip: Micro Focus Connect installs connections for several third-party systems, some of which you might not use in your organization, by default. Consider using the **Delete** action to remove unused connections.

Data Sources Displays a list of currently defined data sources. A **Data Source Details** panel shows detailed information for the currently selected data source. The information displayed on this panel varies based on the data source. You can also use this page to create and edit data sources.

User Maps User maps define users that have different user names across multiple datasources. For example, a user may be `User1` in one datasource and `User 1` in another. User maps allow you to map these two users together so that Micro Focus Connect knows they are the same user.

Authenticators *Authenticators* are used to enforce which product's users are allowed to log into the Micro Focus Connect UI and edit configurations. A default authenticator is installed with the following credentials `Administrator`:`Administrator`.

The Dashboard Toolbar

The Micro Focus Connect dashboard toolbar contains icons that:

Log out of the UI. (Logging out has no effect on the Micro Focus Connect server).

Display the **Settings** dialog box, from which you can configure general system settings such as resources and error notification.

Get help for Micro Focus Connect, either by displaying the *Using Micro Focus Connect* guide, or accessing the Micro Focus Connect community (*http://community.microfocus.com/*).

What to Do Next

Configure general system settings, as described in *Setting Synchronization Resources* and *Email Settings*.

Starting and Stopping Connections

A connection needs to be fully defined before you can start it.

Tip: Micro Focus Connect attempts to run a connection once it is defined. You can see a connection's status on the Micro Focus Connect dashboard.

- To start a connection, click its **Start** button () on the dashboard. The button changes to the **Stop** button () and the status is updated.
- To stop a connection, click its **Stop** button () on the dashboard. The button changes to the **Start** button () and the status is updated.

Connection Status Values

The **Connections** page contains a grid listing each of your connections. One of the columns in the grid is **Status**. The following are the available **Status** values:

Disabled — The user-configurable value of `Enabled` in `Connect.xml` is `false`.

Failed — One or more sync-sets associated with this synchronization have failed and no subsequent iterations have succeeded. See the `Running` status for an example.

Idle — There are no projects to synchronize or the `projectMaps` are disabled.

Restarting — The application is re-reading the configuration file (`Connect.xml`) and is restarting all of the synchronizations. When the sync is complete, the status will change to `Running` or `Failed`.

Running — The status will be `Running` when the last available status for all sync-sets is `Success`.

For example: A synchronization has three sync-sets (`ss1`, `ss2`, `ss3`):

```
Case 1 RUNNING:
   Iteration 2: ss1=success, ss2=success, ss3=success
   Iteration 3: ss1=ongoing

Case 2 FAILED
   Iteration 2: ss1=failed, ss2=success, ss3=success
   Iteration 3: ss1=ongoing

Case 3 RUNNING:
   Iteration 2: ss1=failed, ss2=success, ss3=success
   Iteration 3: ss1=success, ss2=ongoing
```

Server Reinitializing	The application is reinitializing after changes to the configuration file. This status will display for all connections until the application has re-read the configuration file and created the associated sync-sets.
Unknown	The synchronization status is not known to the application. There is an error.

Setting Synchronization Resources

Use this procedure to specify values that Micro Focus Connect uses when synchronizing assets.

1. Click the **Actions** button ( ) and then select **Settings**. The **Global Settings** screen appears.
2. Use the **Sync Settings** group to complete the following fields for your environment:

Field	Description
Maximum Number of Threads	Specifies the number of threads over which you want to spread synchronizations when using multiple data sources or projects. The default is 4.
Synchronization Frequency	Specifies the time, in seconds, between synchronizations. The default is 20.

3. Click **Save** to save your changes.

Setting Up Error Notification

Micro Focus Connect can generate email messages when system and synchronization errors occur. You specify default values for settings that are used by both types of errors on the **Error Notification** tab of the **Settings** dialog box: your SMTP server settings, who you want to receive error notification email, and how often. If you want, you can override email settings on an individual connection basis as described in *Creating a Connection*.

1. Click the **Actions** button ( ) and then select **Settings**. The **Global Settings** screen appears.
2. In the **SMTP Configuration** and **Email Settings** groups, complete the fields as described below.
3. When you are done, click **Save** to save your changes.

SMTP Configuration	Use these fields to specify information needed to identify and connect to your SMTP server.	
	Host	The email system's host name.
	Port	The email system's port number.
	Login Name	The email user.
	Password	The password for the email user.
	From Address	The email address from which notification emails will be sent.
Email Settings	Use these fields to specify email recipients and how often you want Micro Focus Connect to send error notification email.	
	Send Email To	Email addresses for the users you want to receive error notification email. Separate addresses with a semicolon (;).
	Frequency	The frequency with which you want Micro Focus Connect to send error notification email. The default is 60 minutes.

Installing a Connector

You might need to install a connector if one for your third-party system wasn't installed with Micro Focus Connect. To install a connector:

1. Go to our community site *http://community.microfocus.com/borland/* and download the connector you need to the Micro Focus Connect folder.
2. Open the `Readme.html` file for the connector you downloaded and follow all steps to configure it. (Each connector has its own configuration procedures.)
3. Start Micro Focus Connect to load your connector.
4. Navigate to the `logs` directory (`c:\Users\davidf\AppData\Local\Borland\Borland Connect\logs\`, for example) and open the most recent `BC-Log*.log`. You will see a line that displays success or failure for loading your connector:

   ```
   14 Mon Mar 16 11:01:09 PDT 2015: Discovered com.git.connect.GitDataPool
   ```

   or

   ```
   14 Mon Mar 16 11:01:09 PDT 2015: Warning: Failed to load a connector.
   ```

   If the log contains a warning, the connector did not load properly. Refer to the connector's `Readme.html` and verify that all of the connector's required .JAR libraries have been installed.

Merging Connect.xml Content

The `Connect.xml` file that is used by Micro Focus Connect is stored in the Atlas Hub within the StarFlow Extensions project located in the following folder: `StarFlow Extensions/Connect`. There are several scenarios where you may want to combine content from other `Connect.xml` files into this file. For example, you may have different `Connect.xml` files from a Micro Focus Connect version upgrade or from a new connector that you downloaded from the community. To combine these files:

1. Using the StarTeam Cross-Platform Client, check out `Connect.xml` from the StarFlow Extensions project located in the `StarFlow Extensions/Connect` folder of your Atlas Hub.
2. Open it for editing.
3. Open your new connector's `Connect.xml` or `Connect.xml.sample` - these files should be available in the root directory of your connector folder.
4. Copy the full `<DataSource>` element that you want from your new connector file and paste it into the appropriate location in the `Connect.xml` from the Atlas Hub.
5. Copy the full `<Synchronization>` element that uses the `<DataSource>` element in the previous step and paste it into the appropriate location in the `Connect.xml` from the Atlas Hub.
6. Save the `Connect.xml` file and check it back into the Atlas Hub.

Example: Integrating an SCM Connector

The most common use case for an SCM connector is to manage your Release and Integration branches in Atlas Hub while the development teams use a different SCM tool for their sandbox branches. This model allows each development team to work with their sandbox tooling of choice while still maintaining an enterprise-class single source for release and change management in Atlas Hub. To set up the SCM Connector:

1. Choose the appropriate SCM connector and follow its `Readme` file to set it up. Some connectors are installed to your Micro Focus Connect installation directory, and others are available from our community (*http://community.microfocus.com*).
2. In the StarTeam Cross-Platform Client, navigate to the Release or Integration view and use the **Copy URL to Clipboard** option on the folder that you want to synchronize. Place the URL in the `<sourceRootPath>` of the `Connect.xml` project map, corresponding to the correct `Source Project` name.
3. Perform a complete file checkout from the Atlas Hub Release view. These will be the files used to establish the initial branch in the other SCM tool.
4. Open the other SCM tool and create a new branch (Integration branch) adding the complete hierarchy of folders and files checked out from the `Atlas Hub Release` view.

5. Copy the URL (or unique identifier) to the root folder of the newly created Integration branch in the other SCM tool. Place this URL in the `<targetRootPath>` of the `Connect.xml` project map, corresponding to the correct target project name.
6. Start Micro Focus Connect with the SCM settings completed.
7. Create child branches from the Integration branch in the other SCM tool for the development team to work in. These can be shared branches, individual branches, feature branches or defect branches. The team is free to work in these branches in any way that matches your best practices. When code changes are completed in the sandbox and merged back into the Integration branch in the other SCM tool, Micro Focus Connect will automatically synchronize the changes into the `Release view` of Atlas Hub to be tracked and managed along with other contributing team changes. If any changes are made in the `Release view` directly in the Atlas Hub UI or by other contributing teams, then Micro Focus Connect will synchronize those changes back into the Integration view to be merged into the team sand boxes.

Creating a Data Source

This topic describes how to use the Micro Focus Connect UI to:

- Create a data source.
- Enter the data source connection details.
- Test the connection to the data source.
- Add types from the data source that you want to use.

Tip: You need a data source in order to fully define a connection.

1. On the Micro Focus Connect dashboard, click the **Data Sources** tab.
2. Above the **Data Sources** list, click **Create New Data Source**.
3. On the dialog box that opens, complete the **Name** and **Product** fields:

New Data Source Name	Enter a unique name for your data source.
Data Source Product	The products that are available in the list are the connectors that were added with the product installation or the ones that you downloaded from our community and installed yourself.

4. Click **Add Data Source**.

   Your data source is added to the list of data sources. Select it to edit it. The data source pane is refreshed with additional fields that are specific to that product. Refer to the `Readme.html` file that was installed with your connector for more information on these fields.
5. Click the **Connect** button. Micro Focus Connect connects to the data source you have specified.
6. Click the **Add New Type** button (you might have to scroll to make the button visible), and then use the drop-down button in the new field to choose the types from your data source that you want to make available.

   Important: You must add types to your data sources before you can add them to a connection.
7. When you are done adding types, click the **Save** button to save the data source. The new data source appears in the **Available Data Sources** panel and can now be added to a connection as described in *Creating a Connection*.

Creating a Connection

In Micro Focus Connect, a *connection* represents the relationship between two data sources. You use the connection:

- To identify the data source whose assets you plan to synchronize.
- To specify the asset types, fields, and relationships you want to synchronize.
- To specify the projects you want to synchronize.

You perform these tasks using the **Create Connection Wizard**.

Note: The data sources you want to use for a connection must exist before you can complete a connection. See *Creating a Data Source* for more information.

1. From the **Connections** tab on the dashboard, click the **Add Connection** button. The **Create Connection Wizard** appears.
2. On the **Data Source** tab, enter a name in the **Connection Name** field.
3. In the **Master Name** field, select a data source to use as the master data source.

   The *Master* designation is used to determine conflict resolution. For data sources that do not merge content, the master designation determines which connector changes are applied when changes are seen from both data sources.
4. In the **Target Name** field, select a data source to use as the target data source.
5. Optionally, use the fields in the **Error Notification** group to override error notification email settings specified in **Settings**:

   - Enter email addresses (separated by a semicolon (;)) in the **Send Email To** field.
   - Change the value in the **Frequency** field.

   Tip: Email addresses and frequency values established on the **Settings** page are not displayed here.
6. Click the **Next** button if you want to define types and fields you want to synchronize now. The **Types and Fields** tab appears. See *Adding Types to Connections* for more information. Otherwise, click the **Save** button to save the connection.

   Note: If you save the connection at this point, note that it is incomplete.

Adding Types to a Connection

A *type* is a system asset such as a task, topic, change request, or story. When creating a connection, you must add at least one type to synchronize between your source and target. For example, you may want to map a CA Agile Central *Hierarchical Requirement* to an Atlas Hub *Story*.

Important: The types that are available to add to a connection are limited to the types that you added to your data source. If the type that you want is not listed, return to the **Data Sources** tab and add the type to the data source. See *Creating a Data Source* for more information.

1. If you are in the process of creating a connection, navigate to the **Types and Fields** tab. If you are editing an existing connection, on the dashboard, click the **Edit** button ( ) and navigate to the **Types and Fields** tab.
2. Select a direction for data synchronization from the **Default Sync Direction** list. All synchronizations will be performed in this direction unless you choose to override it. Values for synchronization direction are:

From Master	Data is only synchronized from the Master to the Target.
To Master	Data is only synchronized to Master from the Target.
Bi-Directional	Data is synchronized both to and from the Master and Target. (This is the default.)
3. Click the **Add Type Mapping** button. The **Add Type Mapping** dialog box appears.
4. The **Target Type** list contains all the types that you added to your Target data source. Select a type from the list.

Tip: Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

5. The **Master Type** list contains all the types available in the Master data source. Select the type you want to map.

6. Click **Add Field Mapping**. You use the controls that appear to choose the fields for the type you are synchronizing that you want to map.

   a) Select a field to map.
   b) Select the synchronization direction in the **Direction** list for each field.
   c) The **HTML Conversion** list allows you to choose if your HTML-based fields should be converted to plain text or vice-versa. Select either **No Conversion**, **From Master**, or **To Master**.
   d) Select the Master field to map to your field.
   e) If you have created user maps and you are currently mapping a user-based field, click the **Enable User Map** option.

   Tip: If the fields you are synchronizing use different values, you will want to create a value map. See *Adding Value Maps to Types* for more information.

7. Click the **OK** button to save your mappings and close the **Add Type Mapping** dialog box, or click the **Relationships** tab to specify the relationships you want to synchronize as described in *Adding Relationships to Types*.

Adding Relationships to Types

Most systems store relationship data as a standard property of an asset. So in order to synchronize relationships, Micro Focus Connect needs to know the name of the property, type of data in the property, the relationship type you want to store the type as, and the direction in which you wish Micro Focus Connect to synchronize this data.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box, click the **Relationships** tab. If you are editing an existing connection, click the **Relationships** button () on the **Types and Fields** tab of the **Update Connection** window.
2. Click the **Add** button for each data source relationship you want to map. A new row appears in the list. The first column displays the **Type** name.
3. In the **FIeld Name** column, select the name of the property that contains the relationship value.
4. In the **Field Data Type** column, select the type of data stored in the property.
5. In the **Type of Relationship** column, select one of the fixed list of relationship types.
6. In the **Direction** column, select the mapping direction:

From Master	Data is only synchronized from the Master to your data source.
To Master	Data is only synchronized to Master from your data source.
Bi-Directional	Data is synchronized from Master to your data source, and vice versa.

7. Click the **OK** button.
8. If you are in the process of creating a connection, optionally click the **<system name> Sync Criteria** tab to specify criteria you want to use to restrict synchronization to certain system assets. See *Adding Data Source Sync Criteria to Types* for more information.

   Tip: Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

Specifying Synch Criteria for Third-Party Types

If you want, you can specify criteria that Micro Focus Connect will use to restrict synchronization to a certain subset of types. You do this by selecting a type from your data source and creating a query to specify the values you want that type to match in order to be synchronized. You can use `AND` or `OR` operators to define as many query clauses as needed.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box, click the **<system name> Sync Criteria** tab.

   Tip: Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.

   If you are editing an existing connection, click the **Sync Criteria** button ( ) on the **Types and Fields** tab of the **Update Connection** window.
2. Click the **Add** button. A new row appears in the list.
3. Select the data source property from the **Select Field** list. For example: `Blocked`.

   Tip: If your data source does not provide a list of property names, you can type it in this field.
4. In the **Value** column, enter the value that the field must contain in order to be synchronized. For example: `True`.
5. Optionally, click the **Add** button to specify synchronization criteria for another field. A field that allows you to specify `AND` or `OR` operators appears.
6. Choose the operator you want to use to construct your query.

   Note: You can use only one operator or the other when constructing your query. (You cannot mix `AND` and `OR` clauses, for example.)
7. Click **OK** to save your changes.

Specifying Sync Criteria for Atlas Hub Types

This optional page allows you to define what subset of data for the type should be synchronized. You will need to select a type from the Atlas Hub and create a query to specify the values.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box of the **Create Connection Wizard**, click the **Atlas Hub Sync Criteria** tab. If you are editing an existing connection, click the **Edit** button ( ) on the **Types and Fields** tab of the **Update Connection** window and then click the **Atlas Hub Sync Criteria** tab.
2. Click the **Add** button. A new row appears in the list.
3. Select the Atlas Hub property from the **Select FIeld** list. For example: `Blocked`.

   Tip: If your data source does not provide a list of property names, you can type it in this field.
4. In the **Value** column, enter the value that the field must contain in order to be synchronized. For example: `True`.
5. Optionally, click the **Add** button to specify synchronization criteria for another field. A field that allows you to specify `AND` or `OR` operators appears.
6. Choose the operator you want to use to construct your query.

   Note: You can use only one operator or the other when constructing your query. (You cannot mix `AND` and `OR` clauses, for example.)
7. Click **OK** to save your changes.

Modifying Advanced Values for Types

You use the **Advanced** tab of the **Type Mapping** dialog box to specify the names of the fields in your Master and Target systems that are used to store the unique ID of the types you are synchronizing -- if you are synchronizing stories and defects, you would enter the names of those fields here, for example.

1. If you are in the process of creating a connection, in the **Add Type Mapping** dialog box of the **Create Connection Wizard**, click the **Advanced** tab.

   If you are editing an existing connection, click the **Edit** button ( ) on the **Types and Fields** tab of the **Update Connection** window, and then click the **Advanced** tab.
2. Enter the names of the fields used to store the IDs of the types you are synchronizing. You must specify at least one of the type ID fields.
3. Click **OK**.

Adding Value Maps to Fields

Field values sometimes vary across systems. For example, in CA Agile Central, a value for `ScheduledState` may be `Complete`, whereas the corresponding field in the Atlas Hub, `Status`, uses `Fixed`. You express these differences by defining value maps as part of your connection.

Note: You can add value maps only after the field map between your two systems has been created.

1. From the dashboard, click the **Edit** button ( ) for the connection for which you will be defining one or more value maps. The **Update Connection** window appears.
2. In the **Update Connection** window, navigate to the **Types and Fields** tab.
3. In the **Enabled Types** pane, click the triangle to expand the row for the type that has a field for which you wish to create a value map. The field mappings you have defined for the selected type are displayed.
4. Click the **Edit Value Maps** button ( ). The **Value Maps** dialog box appears.
5. Click the **Add** button. A new row appears in the list.
6. Use the **Mapped Value** and **Atlas Hub Field** fields to enter pairs of the values you want to map. For example, if you were creating a value map for status, you might enter `Complete` for the CA Agile Central value and `Fixed` for the Atlas Hub.
7. Repeat steps 4 and 5 as needed to create additional value maps for the current field.
8. Click the **OK** button. The **Value Maps** dialog box closes.
9. Click the **Save** button on the **Update Connection** window to save your changes.

Adding Projects to a Connection

The last step of defining a connection is to map the projects from your Target to the projects in the Master.

1. If you are in the process of creating a connection, navigate to the **Projects** tab in the **Create Connection Wizard**. If you are editing an existing connection, click the **Edit** button ( ) on the dashboard for the connection whose projects you wish to specify, and then navigate to the **Projects** tab of the **Update Connection** window.
2. Click the **Add** button. A new row is added to the list.
3. Select the project you want to map from the **Target** list.

   Tip: Micro Focus Connect uses the data source product name for the <system name> displayed in the UI.
4. Select the corresponding Master project from the **Master Project** list.
5. Project synchronizations are enabled by default. If you wish to disable it, clear the check box.
6. Some data sources for SCM tools (like Git and Subversion) allow you to specify a deeper directory level synchronization. If it's available and you want to specify a directory deeper than the root directory for synchronization, click the directory button ( ) .

   The **Set Project Path** dialog box opens.

For each data source, enter the path in the fields provided.

Click the **OK** button to close the **Set Project Path** dialog box.

7. Once you have added all projects you want to synchronize, click the **Save** button to save your changes.

User Maps

User maps define users that have different user names across multiple datasources. For example, a user may be `User1` in one datasource and `User 1` in another. User maps allow you to map these two users together so that Micro Focus Connect knows they are the same user. Use the following sections to learn how to create a user map and then to turn it on at a field level.

Creating User Maps

1. On the main Micro Focus Connect UI, click the **User Maps** tab.
2. Click **Add User Map**. A row is added to the list.
3. Double click the `User Map` text in the **Name** field.
4. Rename the user map. This value is only used in Micro Focus Connect and can be whatever you want it to be.
5. In the user map row, click (**Add**). A new `user name` row is added as a child to the user map.
6. In the **Datasource** column, double click the new row to enable the list. Select the proper datasource for the user.
7. Double click the `User name` text in the **Name** field and type in the user name as it exists in that datasource.
8. Follow the same steps to add additional users/datasources to the user map.

Enabling User Maps

If you have created user maps, you still need to turn them on for the user fields.

1. Open a connection.
2. Navigate to the **Types and Fields** page.
3. Select a type and click (**Edit**).
4. For each user-based field in the list, put a check in the **Enable User Map** column.

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**.

Watch the *Home Tour* video.

Activity Feed

The activity feed shows the latest changes since your last login. At a glance, you can view changes to your items, track status on Requirements and Stories, and view warnings that highlight items that Atlas has identified may need action.

The activity feed is divided into the following sections:

All	Includes a flat list of items that have been created and or updated in chronological order. The provided item information is not detailed nor in any context for the item and relationships.
Concepts & Ideas	Lists new and updated Whiteboards/Concepts, as well as any discussions around them, displayed in an hierarchy.
Authoring & Definition	Displays changes targeted to the traditional Requirements user. That is, Requirement changes or additions, and discussions that may have transpired around them.
Definition Progress	Displays progress of Requirements that are being defined and have been configured for date planning.
Delivery Progress	Displays progress in Requirements delivery, in other words, the Stories. The stories are rolled up to their corresponding Requirement, keeping progress organized and easy to follow. If there are stories that do not relate to a Requirement, they are shown as Warnings,
Planning & Feedback	Displays created and updated Plans and discussions around Plans.

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.

Viewing Past Activity Feeds

There are times when you may want to review the updates from your Activity feed from a past date. Perhaps you were unable to give it the attention you wanted when you logged in on that particular day. To view a past Activity feed:

1. Click (**Home**).
2. Choose a Project.
3. Click (**Actions**).
4. Click calendar. The calendar appears indicating the dates where you can go back.
5. Choose a date from the calendar. The Activity feed displays the information that was on the feed on the date selected.

Working with Projects

Use the **Home** perspective () to manage Projects in Atlas.

Creating a Project

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

Watch how to do it: *Creating a Project*.

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 (`Public` or `Restricted`) from the list.
5. Enter the **Project Description**.
6. Click **Save**.

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. Click **Edit** () in the **Favorite** or **Available Projects** list. The **Edit Project** dialog box appears.
3. Make changes to the Project **Name** or **Description**.
4. 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 **ProjectProject** 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, **Plan Review** Reports, and **Plan Tracking** reports from the **Home** perspective. The reports are output as Microsoft Office 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.

Watch how to do it: *Generating Report*.

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:

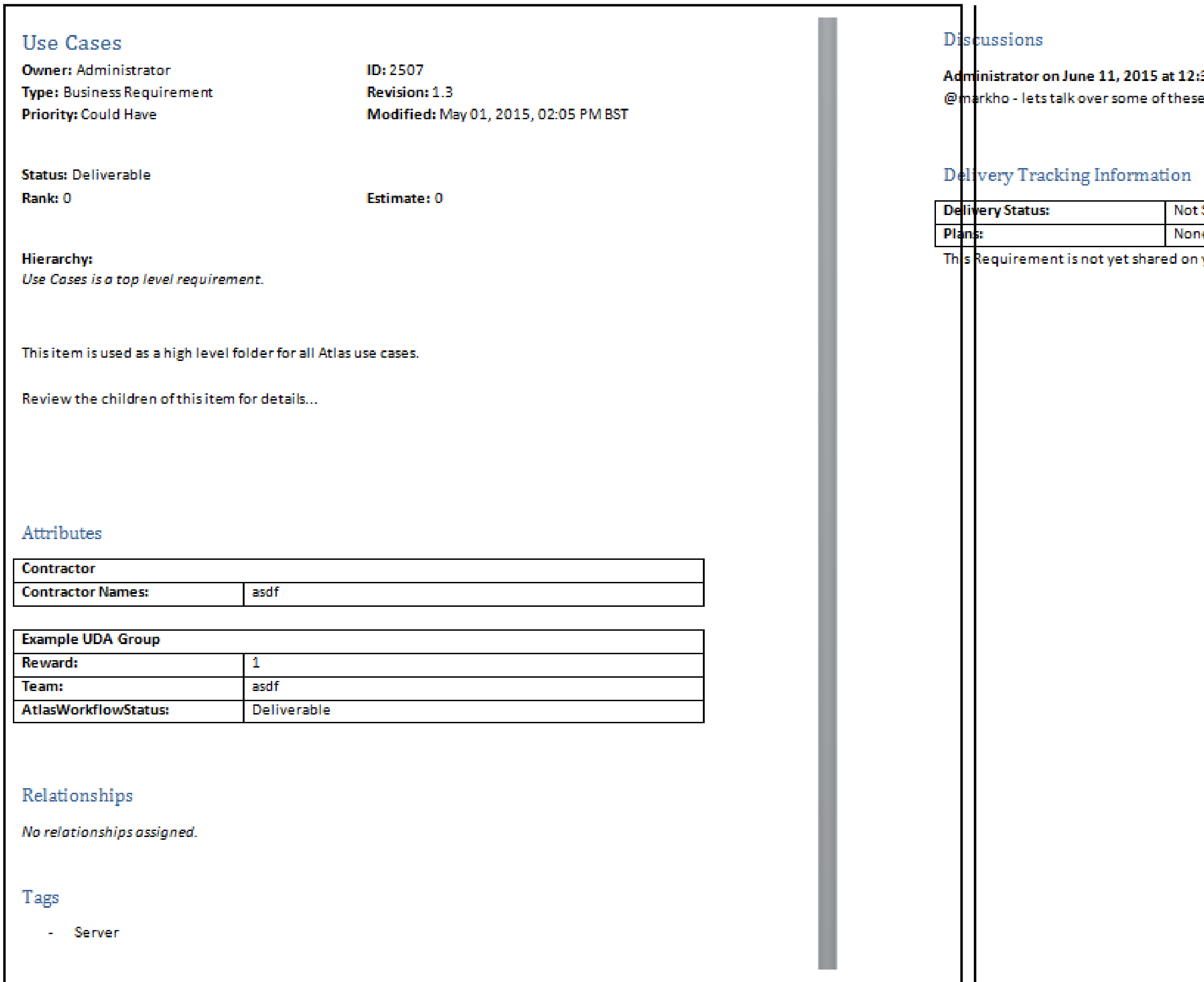
Attribute	Includes the User Defined Attributes for the Requirement.
Relationships	Includes a list of the items related to each Requirement.
Tags	Includes the Tags associated with the Requirements.
Discussions	Includes the Discussion threads associated with each Requirement.
Delivery Tracking	Includes the tracking status.
System Attributes	Includes system attributes.
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.

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
Type: Business Requirement
Priority: Could Have

ID: 2507
Revision: 1.3
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 12:3
@markho - lets talk over some of these

Delivery Tracking Information

Delivery Status:	Not S
Plans:	None

This Requirement is not yet shared on y

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. 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 Requirement.
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.

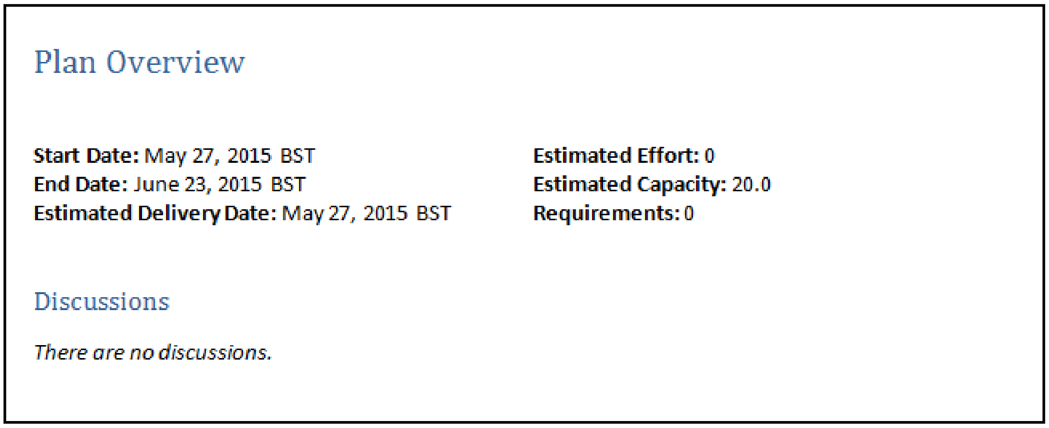
Delivery Tracking	Includes the tracking status.
System Attributes	Includes system attributes.
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.

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

Start Date: May 27, 2015 BST
End Date: June 23, 2015 BST
Estimated Delivery Date: May 27, 2015 BST

Estimated Effort: 0
Estimated Capacity: 20.0
Requirements: 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 Micro Focus 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 Requirement.
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.
System Attributes	Includes system attributes.

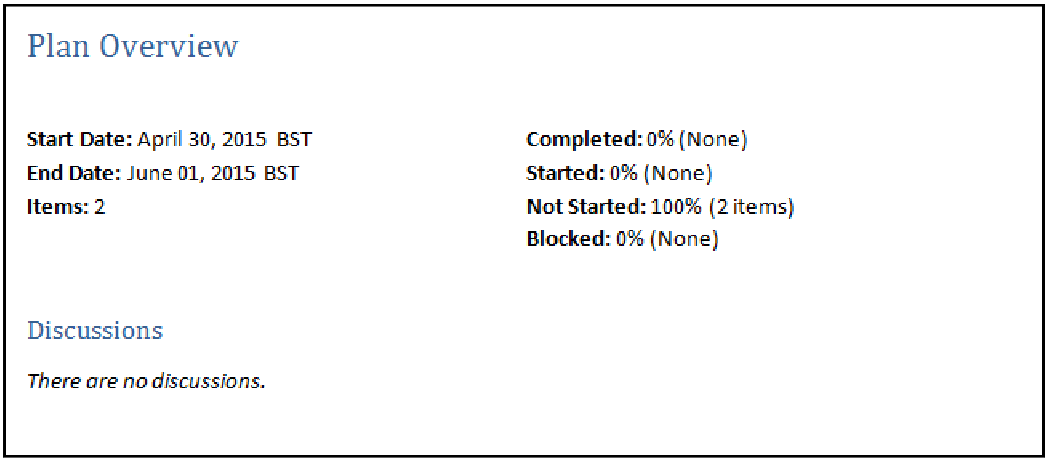
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.

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

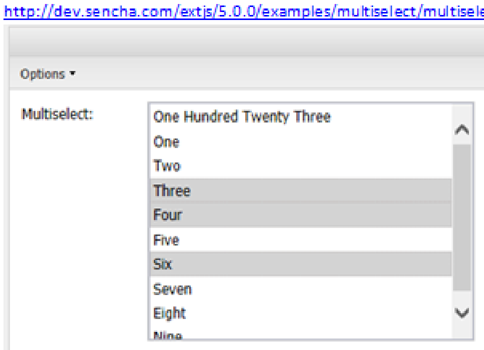
Owner:
ID: 2658
Type: Business Requirement
Revision: 1.0
Priority: Must Have
Modified: May 01, 2015, 10:24 AM BST

Status: Draft test
Rank: 10
Estimate: 8

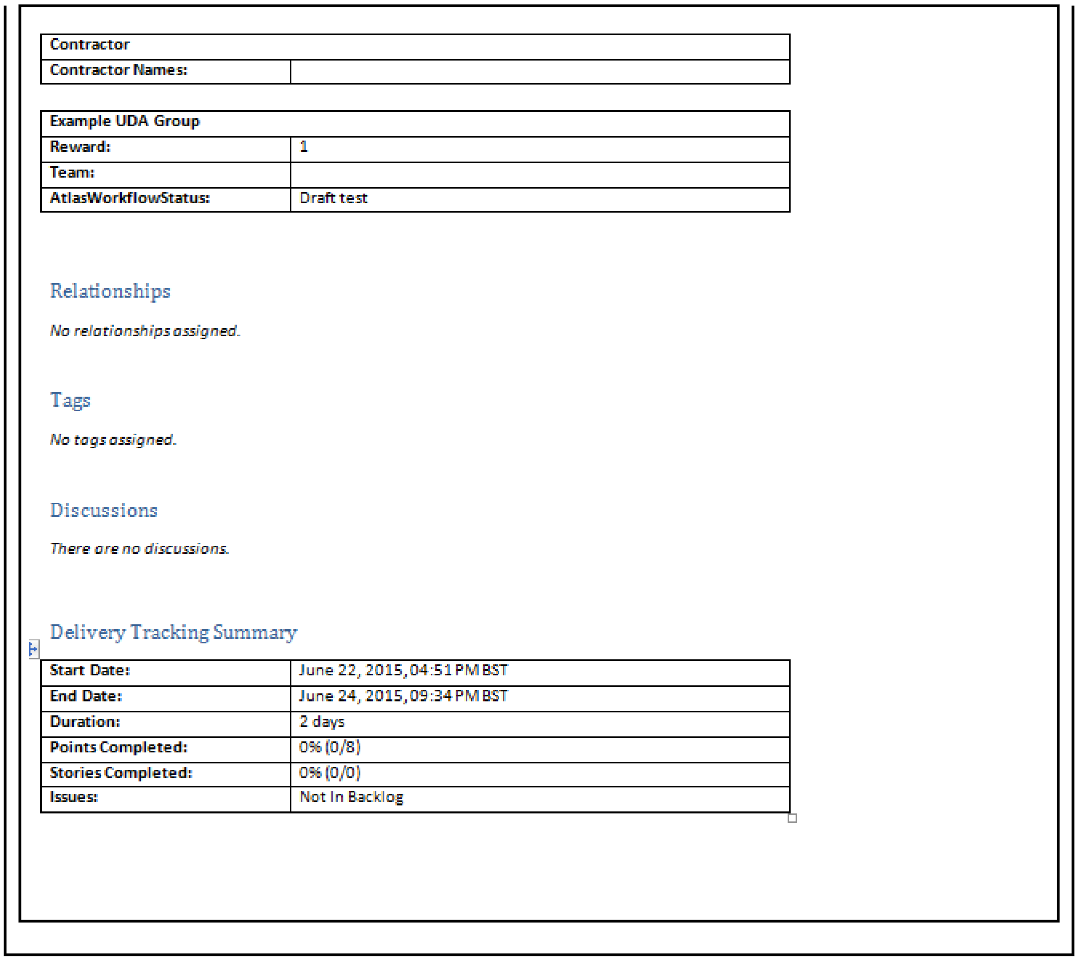
Hierarchy:
- 2550: System and User Administration
- 2649: Flexible type creation
- 2656: UDA types

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 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

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

How many times have you been in a requirements planning session and used a physical whiteboard? Whiteboards help you express an idea or a concept. They use drawings and text to convey your ideas to the team. Some team members are visual and rely on drawings, while others use descriptive lists or steps.

Atlas captures all of this in the **Gather** perspective ( ) with Whiteboards and Concepts.

- Whiteboards are containers for Concepts.
- Concepts are comprised of many forms of media: complex diagrams and work-flows, text, pictures, URLs, system files, etc.
- **Gather** allows you to *discuss* these Concepts and collect feedback from all team members with the Discussion panel.
- You can then organize your Concepts into well-formed Requirements.

Watch the tour: *Gather Tour*.

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.

Watch how to do it: *Creating Whiteboards*.

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**.

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 assets that you add to Whiteboards to organize your ideas. A Concept can be a *Note*, *Diagram*, *Attachment*, or *Link*. Concepts can be comprised of a complex diagram, contain relationships, use discussions and versions, and can be filtered.

Use the following sections to learn more about Concepts.

Watch how to do it: *Creating a Concept* or *Tagging a Concept*.

Using Diagrams

Atlas contains native diagramming capabilities allowing you to create robust diagrams and mockups. The **Shape** gallery contains hundreds of ready-to-use shapes available for your diagram. As your diagram goes from draft to final version, you will always be able to go back and see previous versions since diagrams contain the same versioning capabilities as other Atlas assets.

Here's how you use diagrams:

- As a *Requirement Type*: When you create a Requirement, you have the option of creating a Requirement of type *Diagram*. This provides all the benefits of a Requirement with your diagram, such as: Attributes, Relationships, Versions, Tags, Attachments, and Discussions.
- As a type of *Concept*: When you create a Concept, you have the option to select the **Diagram** tab and create your diagram there.

Shapes

These are just some of the types of shapes you can use to create your diagram:

Diagrams	BPMN, UML, Flowcharts, Use Case, Lean Mapping, Process Engineering, SysML, EIP, Cisco, AWS, Azure, and more.
Mockups	Windows Applications, Internet Applications, iOS, Android.

Watch how to do it: *Using the Diagraming Feature*.

Creating a Concept Type Diagram

To create a diagram in a Concept:

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. Click the **Diagram** tab.
5. Add a **Title**.
6. See *Using the Diagram Editor* for useful information on creating diagrams.

Creating a Requirement Type Diagram

In order to create a Requirement type diagram, the Requirement Type *Diagram* must be in the **Associated Requirement Types** for your project. See the **Project Req Types** tab in the **Administrator Tools**.

The Diagram Requirement Type appears with next to the name in the Requirements Tree.

To create a Requirement type diagram:

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. Select `Diagram` from the **Requirement Type** list.
4. Type a title for the Requirement in the **Title** field.
5. Click **Save and Close** and then select the Requirement.
6. Double click in the **Description** to begin editing.
7. See *Using the Diagram Editor* for useful information on creating diagrams.

Using the Diagram Editor

The diagram editor contains several panels that help you to create a diagram.

Shapes Panel	Contains categories listing all available shapes.
Diagram Canvas	Contains the diagram that you are creating. Drag-drop to arrange your shapes.
Properties Panel	When you select an item on the canvas, the properties are available for editing in this panel.

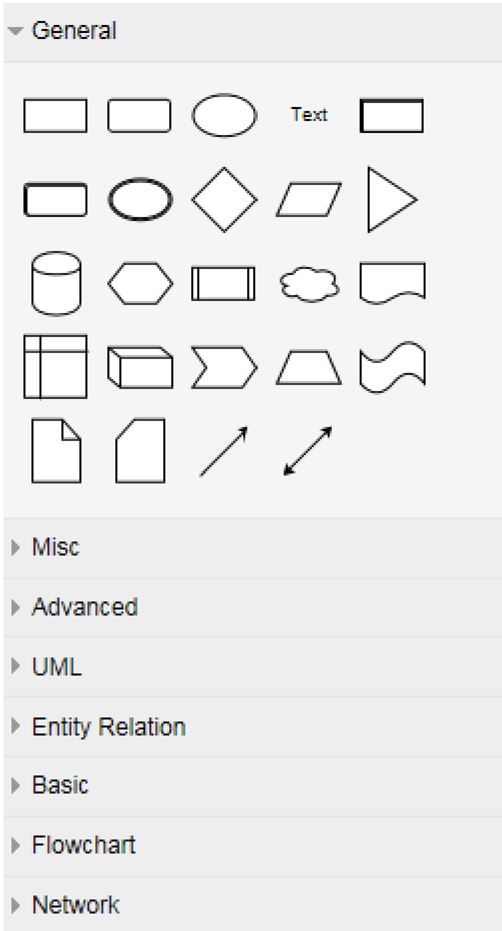
Tips and Shortcuts

Copying Shapes	You can copy and paste shapes within the same canvas or into a canvas of another Requirement.
Panning	Use `CTRL` + `Click` (or the right mouse button) to pan the canvas.
Zooming	Use `CTRL` or `ALT` + `mouse-wheel scroll` to zoom the canvas in/out.
Adding Shapes	Drag a shape from the **Shapes** panel and drop it onto the canvas.
Adding Images	Drag the image from Windows Explorer and drop it onto the canvas. **Note:** You cannot copy an image and paste it onto the canvas.
Cloning Shapes	Hover over a shape until you see blue arrows appear in each direction. Click the arrow to create a connected, cloned shape. To clone without a connector, `Click+drag` the shape or click `CTRL+D`. This allows you to control the connector's length when you add it.
Connecting Shapes	Hover over a shape, then hover over the *anchor point* (x) on the edge, click and drag it to the destination.
Replacing Shapes	Drag the new shape onto the old, wait for the replace icon, and then drop the new shape.
Nudging Shapes	Select a shape, and use the keyboard arrow keys. If you hold the `Shift+Arrow` keys, you can nudge by larger steps (10 pixels)
Resizing Shapes	Select a shape. Hold down `Ctrl+Arrow` (resizes by `1` pixel). Resize the shape in larger increments (10 pixels) by using `Shift`, i.e. `Shift+Ctrl+Arrow`.
Using Text	• **Shapes**: Select a shape and just type. • **White space**: Double-click anywhere and type. • **Connector**: Select it and type.
Undoing an Action	`CTRL+Z`
Adding Image/ Hyperlink	Click the + in the toolbar.
Multi-Selecting	Hold the left mouse button down and then drag over the items you want to select. Release the button. You can also `CTRL+Click` on individual items.
More Options	Right click the canvas.

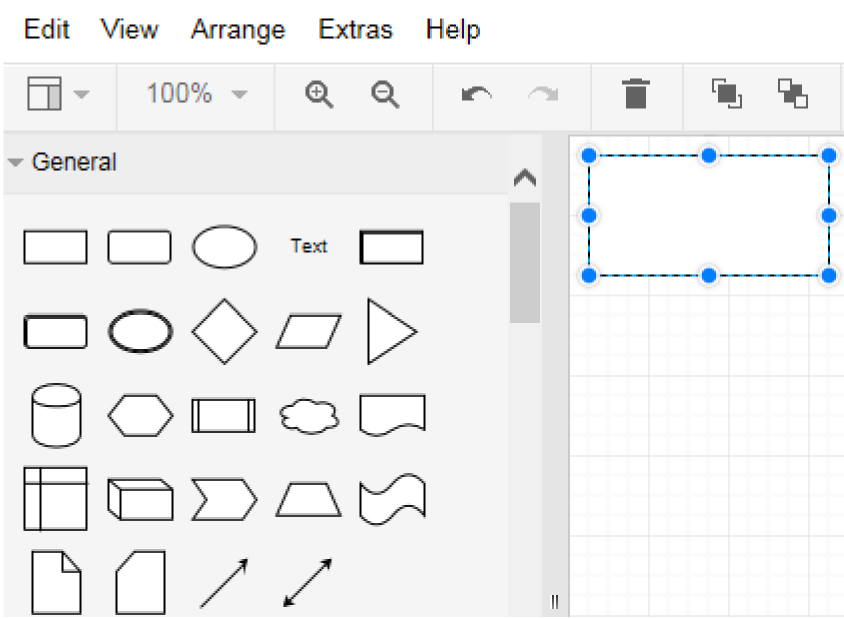
Adding Shapes to the Canvas

To add shapes to your canvas:

1. Expand the **Shapes** panel and choose the shape you want to use.



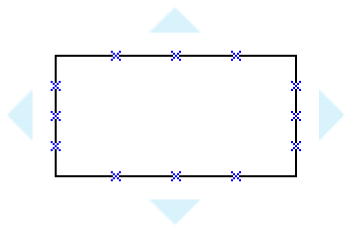
2. Either drag-drop the shape onto the canvas or double click the shape to add it to the top, left corner.



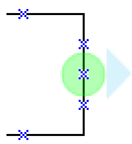
Connecting Shapes

To connect two shapes:

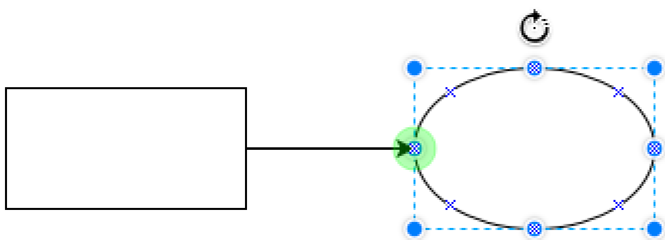
1. Hover over a shape to show its connection points.



2. Put your mouse over the one you want to use and it will turn green.



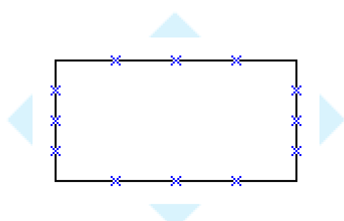
3. Click and then drag-drop the connector on the green dot of the corresponding connection point.



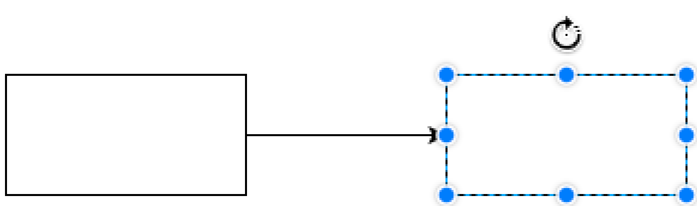
Cloning a Shape

To clone a shape:

1. Mouse over your shape to display its connection points. You will also see arrows on each side.



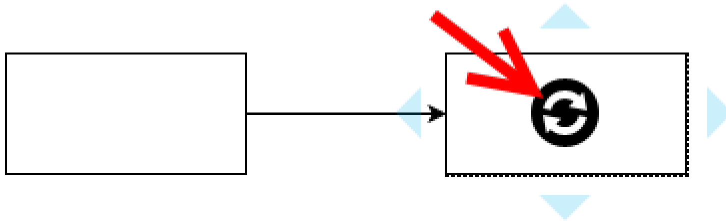
2. Click the arrow in the direction where you want the cloned shape.



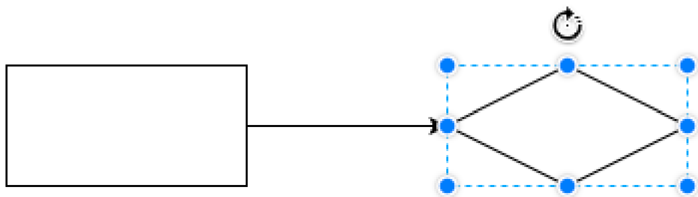
Changing a Shape Type

To change a shape from one type to another:

1. Select a shape from the gallery and drag it onto the middle of the existing shape you'd like to replace. The change icon appears:



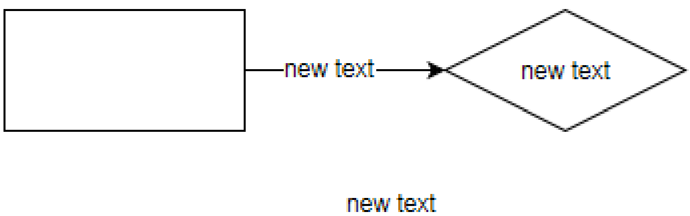
2. Drop the shape and it is replaced.



Adding Text to Shapes or Connectors

To add text to shapes or connectors:

Double click in a shape, in any white space, or on a connector line and type in your text.



Adding Links to Shapes

To add a link (URL) to a shape:

1. Right click a shape and select **Edit Link**.
2. Enter a URL in the **Edit Link** field.
3. Click **Apply**.

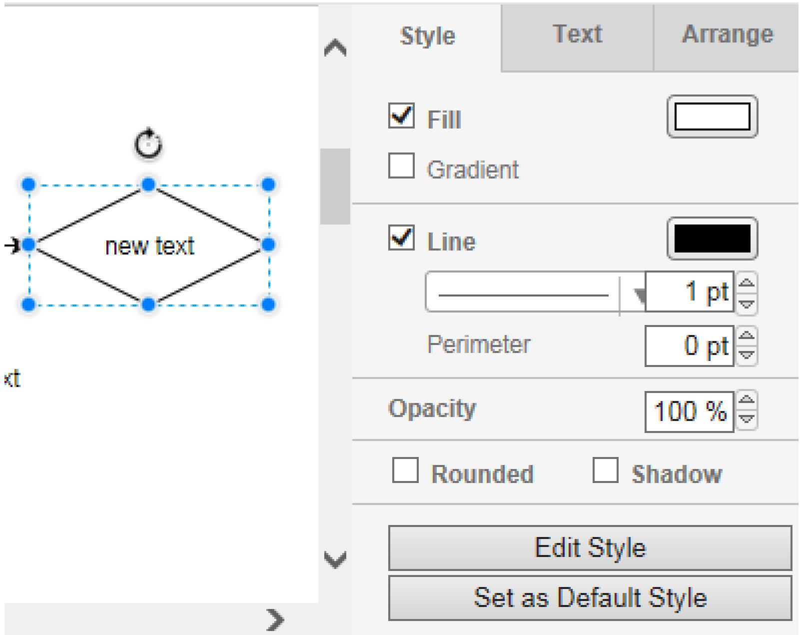
A few notes on links:

- Clicking the link opens a new tab in your web browser.
- Click the pen icon to edit a link.
- Links are only visible when the item is selected.
- Links can go on shapes or connectors.

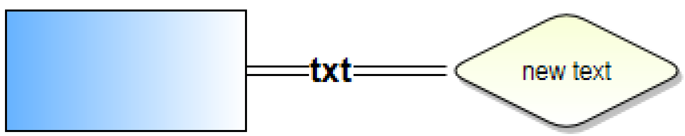
Modifying Properties of Shapes

To change an item's properties:

1. Select an item on the canvas to enable the properties panel on the right.



2. Use the **Style**, **Text**, and **Arrange** tabs to modify the appearance of your shape or connectors.



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 with Stories, Whiteboards, Concepts, Atlas Hub items, and Requirements in different projects.
- Concepts with Stories, Atlas Hub items and Concepts in different Whiteboards.
- Whiteboards and Stories.

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

Whiteboards and Concepts are arranged under one tab in a tree. The top level is the Whiteboard and the items below are the Concept contained within it. Drag the top-level to create a Relationship to the Whiteboard and subsequent Concepts or drag a Concept to create a Relationship to the individual Concept.

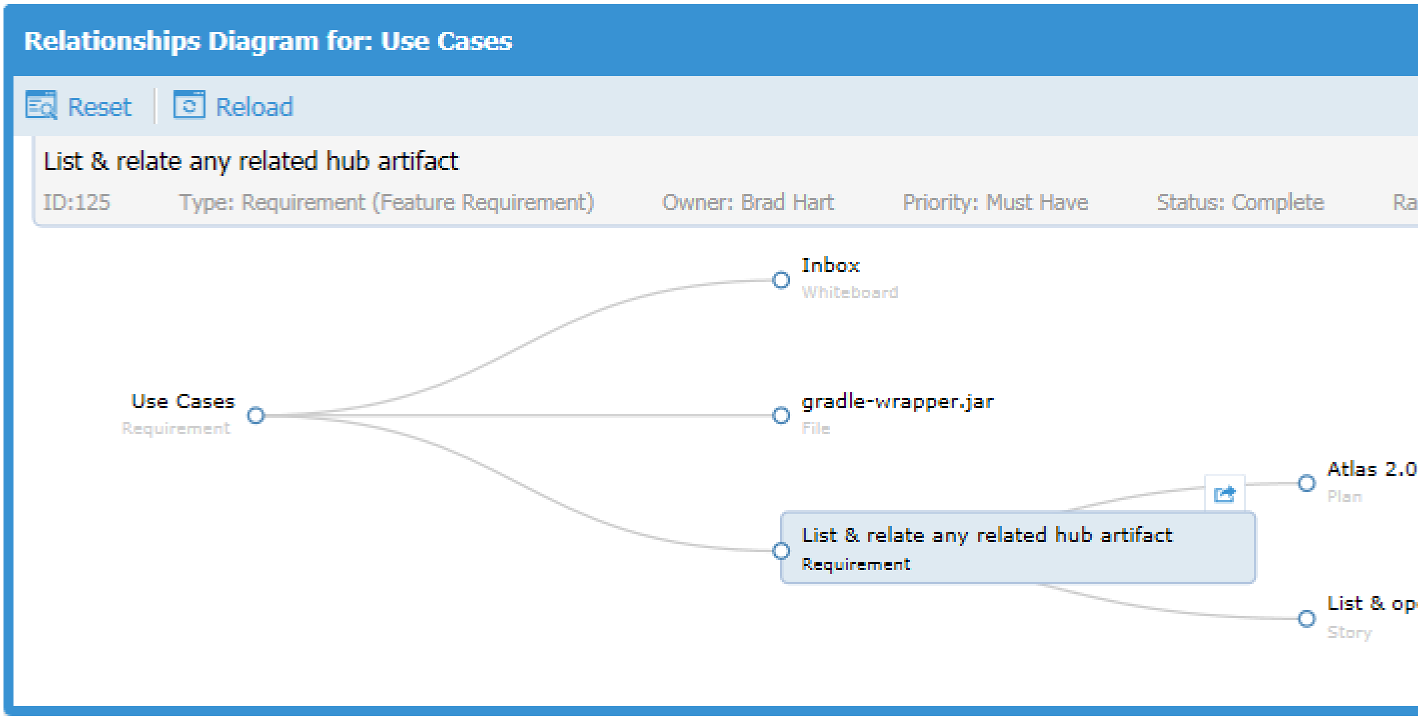
Watch how to do it: *Create a Relationship*.

Visualizing Relationships

Relationships are accessed from the **Relationships** tab and appear in a list. In certain perspectives, you can view your relationships in a diagram. When you see Diagram above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the requirement is in another project than the current one) are highlighted orange.
- Select an item and you will see summary information on the top of the window.
- Click (**Goto**) to go to the item in a new browser window/tab.
- The diagram is an infinite scrolling canvas that can be panned via click and drag, and zoomed via the scroll wheel.
- Click **Reset** to restore the default pan/zoom.
- Click **Reload** to refresh the diagram.
- Although item names are fixed-length on the diagram, hovering over an item displays a tool-tip with an asset's full Name, ID, Type, and Project Name.

Relationship Diagram Example



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. Atlas Hub items display according to the defaults or, in the case of custom Atlas Hub items, according to what the administrator created. Atlas Hub items are displayed in the **Other** tab and are organized in folders and files in a file explorer format.

The items display as follows:

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 Atlas Hub.

1. Open the **Relationship** tab. The **Relationship** pane appears.
2. Scroll through the **Existing Relationships**. Each Relationship shows the status or details.

   Note: Select the status from the **Relationship Status** drop down list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** drop down list to group relationships.
3. Click **...** and choose to update or defer out-of-date relationships.

Creating a Relationship from a Concept

1. Click (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click **New Relationship**.
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. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
8. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
9. Select the type of relationship from the **Relationship Type** drop down list.

   The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
Copy	Creates a copy relationship. Provides a status such as up-to-date and deferred.
Dependent	Creates a dependency between the two items. Provides a status such as up-to-date and deferred.
Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.
10. Click **OK**.

Creating a Relationship from a Requirement

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

3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.

   By default, the current Project is listed.
5. Click **New Relationship**.
6. In **Add Relationships**, click the tab for the item type. The list of items appear.
7. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
8. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
9. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
10. Select the type of relationship from the **Relationship Type** drop down list.

    The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
Copy	Creates a copy relationship. Provides a status such as up-to-date and deferred.
Dependent	Creates a dependency between the two items. Provides a status such as up-to-date and deferred.
Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.

11. Click **OK**.

Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click (**Actions**).
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or
6. Click **New Story**.
7. Accept the information provided or type new information in the appropriate fields.
8. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

Discussions

Throughout Atlas, you can use **Discussions** to have in-depth conversations about most assets. Discussions are available in the following locations:

- **Home**: Activity Feed.
- **Plan**: open a Plan and click **Open Review**.
- **Discussions** tab: for most other assets (Concept, Requirement, etc).

Tip: You can tag specific team members with the @ symbol followed by their user name to call them out and solicit their feedback. They will receive an email.

Agree/Disagree

At times during discussions, you may only want to voice your agreement or disagreement with a statement.

Instead of writing your opinion, simply click or located next to the comment. Your name will be added accordingly to the agree or disagree lists associated with the discussion.

Watch how to: *Start a Discussion*.

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*.

Using Discussions 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 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.

Using Discussions with Plans

1. Click (**Plan**).
2. Double click a Plan to open it.
3. Click **Open Review**. The **Review Test** window appears containing the **Discussions** pane.
4. You can select the top level node in the tree to discuss the entire Plan, or you can select an individual item from the tree.
5. In the **Discussions** pane, click **New Topic** or reply to an existing one.
6. Click **OK**.

Starting a Discussion Topic

You can start a discussion from many stages along your planning cycle in Atlas.

From anywhere in Atlas where discussions are available, in the **Discussions** pane:

Watch how to do it: *Start a Discussion*.

1. Click **New Topic**.
2. Type a title in the **Subject** field.
3. Write a comment in the **Text** field.
4. Optionally to tag team members, type @ and the first letters of the user name to bring up the user list, then select the user name.
5. Click **OK**.

Replying to a Discussion from the Activity Feed

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 **Discussions** view appears, opened to the discussion topic selected from the **Activities** feed.
4. Click . The reply text box appears.
5. Type a reply and click **OK**.

Closing Discussions

After a discussion has run it's course and team members have come to a resolution, you can close a discussion with **Accept** or **Reject**. Click the down arrow next to the reply and select **Accept** or **Reject**. This closes the discussion and the team can no longer reply. However, the discussion thread can be expanded or collapsed for viewing.

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.

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**, **Extended Attributes**, etc) and displayed in a tree list.
7. Double click the **Description** field to view detailed differences in a new window. The **Detailed Differences** window shows exact text changes of the Requirement description.
8. Click **Options** > **Only show differences** to hide all items that haven't changed.
9. Click **Options** > **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**, **Extended Attributes**, etc) and displayed in a tree list.
10. Click **Options** > **Only show differences** to hide all items that haven't changed.
11. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

Using Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

To create a Filter:

1. Click (**Filter**). The **Filter** dialog box appears.
2. Click (**New Filter**). The editable filter field appears in the right panel.
3. Type a name for the filter.
4. Select **Project** if the filter is for the project only or select **Shared** if the filter is for all projects.
5. In the initial **Where** clause group, select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
6. Select an operator from the **Conditions** list (for example., `begins with`, >=, `>,` etc.).
7. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
8. Optional: Click **Add Query Rule** to add a new row to the current **Where** clause group.
9. Optional: Click **[Add Group]** to add another level to the filter. **And/Or** options appear.

   You can add additional groups by repeating these steps.
10. Optional: Click **And** to change it to **Or**.
11. Click **Save**. The filter appears in the filter list.

Using Saved Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

1. Click (**Filter**). The **Filter** dialog box appears.
2. If you have saved a Filter, click the Filter in **Saved Filters** list and click **Apply**. All results matching the filter criteria appear in the results.
3. To stop the applied filter, open the **Filter** dialog box and click **Clear Applied Filter**.

Duplicating Filters

You can duplicate an existing filter and use to use it to create another filter.

1. Click (**Filter**). The **Filter** dialog box appears.
2. Select the filter you would like to duplicate from the **Filter** list.
3. Click (**Duplicate Filter**). A new filter appears in the filter list, named the same as the originating filter with **-copy** ammended to it and the filter information appears in the right pane.
4. Rename the filter.
5. Amend filter criteria.
6. Click **Save**.

Deleting Filters

If you no longer need a filter, you can delete them in order to keep an uncluttered filter list.

1. Click (**Filter**). The **Filter** dialog box appears.
2. Select the filter you would like to delete from the **Filter** list.
3. Click (**Delete**). The filter is deleted from the list.

Quick Filters

Use a *Quick Filter* to quickly find a Requirement in the Define perspective.

Click the **Quick Filters** list and select the filter.

Click **Clear Filter** to remove the filter.

Creating Concepts

Follow the steps below to create a Concept.

Watch how to do it: *Creating a Concept*.

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:

Note	Allows you to type any text you want and include a rich description (including text, links, and images) for it.
Diagram	Allows you to create a diagram or mockup using all of the built-in shapes arranged by categories such as General, Misc, Advanced, UML, Entity Relation, Basic, Flowchart, Network, Azure, BPMN, AWS, Lean Mapping, iOS, Android, and more.
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**.
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.

Creating Tags

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

1. Navigate to either Concepts or Requirements and select the item you want to tag.
2. Click the **Tags** tab. The Tags panel appears.
3. Click **New Tag**. The **New Tag** dialog opens.
4. Type a name for the Tag and click **Save**. The new Tag appears in the **Tag** list.

Downloading Concept Files

Some types of system files cannot be viewed directly in Atlas, 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 Micro Focus 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 an 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.

Saving Concepts as Requirements

1. Click (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click **New Relationship**.
5. Click **New Relationship**.
6. Click **New Requirement**. The **Create Requirement** dialog appears.
7. Select a Requirement Type from the list and rename if you like.
8. Click **Save & Close**.

Here is the result for each type of Concept:

Note	The new Requirement name is the Note's name. The Requirement **Description** is the Note Description.
Diagram	The new Requirement name is the Diagram's name. The Requirement **Description** contains the diagram that you can edit.
Attachment	The new Requirement name is the Attachment's name. The Requirement **Description** contains the Attachment's Description, and the attachment is located in the Requirement's **Attachment** tab.
Link	The new Requirement name is the Link's name. The Requirement **Description** contains the URL and then the Concept description.

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 New Relationship.
5. Click the **Import** tab.
6. Click **Generate**.

Define and Scope Your Requirement

Requirements define how you want to change your application. They should be defined such that the people involved in planning, building, testing, delivering, maintaining, and using the application can clearly understand what needs to be done.

The **Define** perspective provides two ways to view Requirements:

Tree View

Contains the hierarchical tree view of your Requirements. You can select a Requirement in the tree and then select one of it's 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.

Tip: In the Requirement , click to show the Requirement ID in the Requirement tree.

Grid View

Use this view to display all Requirements in a list. To customize the columns that appear, right-click in the header row and select the column you want to appear in the grid.

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**.

Atlas retains your settings such as, adding columns, changing column sizes, and sorting order.

Use the following sections to learn about Requirements.

Watch a tour of the perspective: *Define Tour*.

Using Diagrams

Atlas contains native diagramming capabilities allowing you to create robust diagrams and mockups. The **Shape** gallery contains hundreds of ready-to-use shapes available for your diagram. As your diagram goes from draft to final version, you will always be able to go back and see previous versions since diagrams contain the same versioning capabilities as other Atlas assets.

Here's how you use diagrams:

- As a *Requirement Type*: When you create a Requirement, you have the option of creating a Requirement of type *Diagram*. This provides all the benefits of a Requirement with your diagram, such as: Attributes, Relationships, Versions, Tags, Attachments, and Discussions.
- As a type of *Concept*: When you create a Concept, you have the option to select the **Diagram** tab and create your diagram there.

Shapes

These are just some of the types of shapes you can use to create your diagram:

Diagrams	BPMN, UML, Flowcharts, Use Case, Lean Mapping, Process Engineering, SysML, EIP, Cisco, AWS, Azure, and more.
Mockups	Windows Applications, Internet Applications, iOS, Android.

Watch how to do it: *Using the Diagraming Feature*.

Creating a Concept Type Diagram

To create a diagram in a Concept:

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. Click the **Diagram** tab.
5. Add a **Title**.
6. See *Using the Diagram Editor* for useful information on creating diagrams.

Creating a Requirement Type Diagram

In order to create a Requirement type diagram, the Requirement Type *Diagram* must be in the **Associated Requirement Types** for your project. See the **Project Req Types** tab in the **Administrator Tools**.

The Diagram Requirement Type appears with next to the name in the Requirements Tree.

To create a Requirement type diagram:

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. Select `Diagram` from the **Requirement Type** list.
4. Type a title for the Requirement in the **Title** field.
5. Click **Save and Close** and then select the Requirement.
6. Double click in the **Description** to begin editing.
7. See *Using the Diagram Editor* for useful information on creating diagrams.

Using the Diagram Editor

The diagram editor contains several panels that help you to create a diagram.

Shapes Panel	Contains categories listing all available shapes.
Diagram Canvas	Contains the diagram that you are creating. Drag-drop to arrange your shapes.
Properties Panel	When you select an item on the canvas, the properties are available for editing in this panel.

Tips and Shortcuts

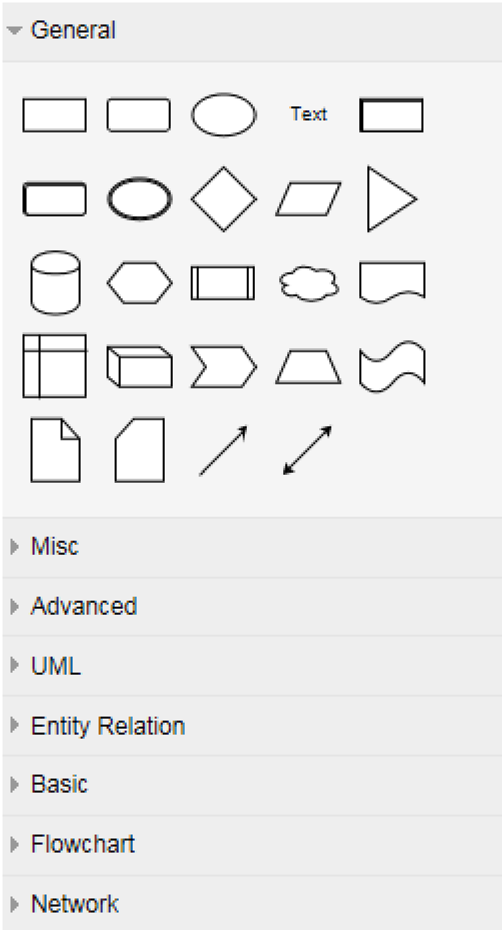
Copying Shapes	You can copy and paste shapes within the same canvas or into a canvas of another Requirement.

Panning	Use `CTRL` + `Click` (or the right mouse button) to pan the canvas.
Zooming	Use `CTRL` or `ALT` + `mouse-wheel scroll` to zoom the canvas in/out.
Adding Shapes	Drag a shape from the **Shapes** panel and drop it onto the canvas.
Adding Images	Drag the image from Windows Explorer and drop it onto the canvas. **Note:** You cannot copy an image and paste it onto the canvas.
Cloning Shapes	Hover over a shape until you see blue arrows appear in each direction. Click the arrow to create a connected, cloned shape. To clone without a connector, `Click+drag` the shape or click `CTRL+D`. This allows you to control the connector's length when you add it.
Connecting Shapes	Hover over a shape, then hover over the *anchor point* (x) on the edge, click and drag it to the destination.
Replacing Shapes	Drag the new shape onto the old, wait for the replace icon, and then drop the new shape.
Nudging Shapes	Select a shape, and use the keyboard arrow keys. If you hold the `Shift+Arrow` keys, you can nudge by larger steps (10 pixels)
Resizing Shapes	Select a shape. Hold down `Ctrl+Arrow` (resizes by 1 pixel). Resize the shape in larger increments (10 pixels) by using `Shift`, i.e. `Shift+Ctrl+Arrow`.
Using Text	• **Shapes**: Select a shape and just type. • **White space**: Double-click anywhere and type. • **Connector**: Select it and type.
Undoing an Action	`CTRL+Z`
Adding Image/ Hyperlink	Click the + in the toolbar.
Multi-Selecting	Hold the left mouse button down and then drag over the items you want to select. Release the button. You can also `CTRL+Click` on individual items.
More Options	Right click the canvas.

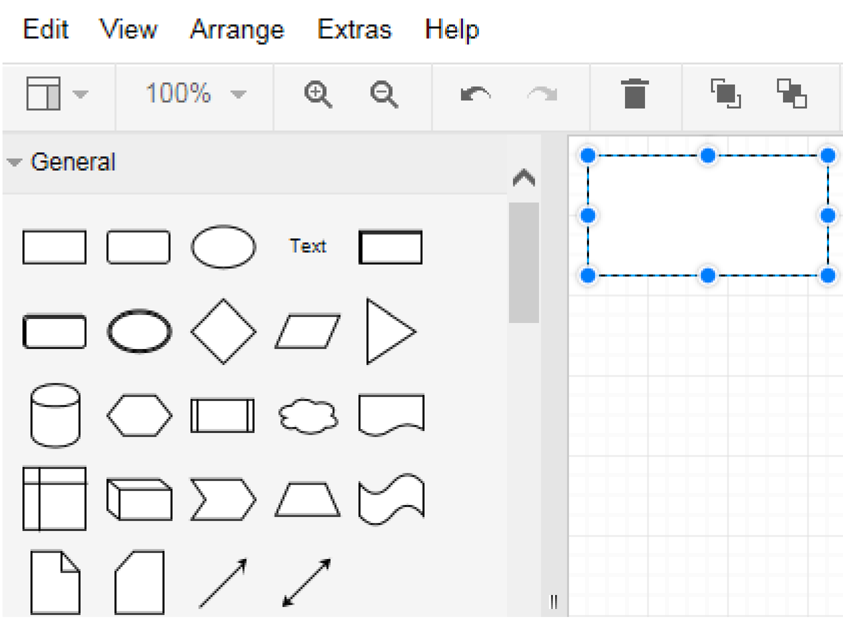
Adding Shapes to the Canvas

To add shapes to your canvas:

1. Expand the **Shapes** panel and choose the shape you want to use.



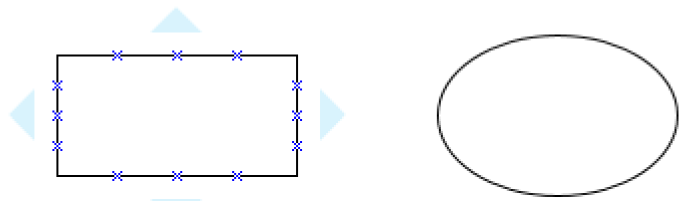
2. Either drag-drop the shape onto the canvas or double click the shape to add it to the top, left corner.



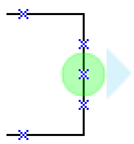
Connecting Shapes

To connect two shapes:

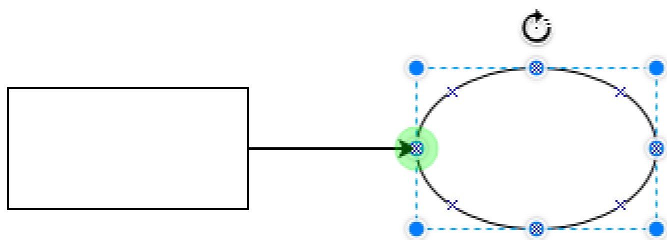
1. Hover over a shape to show its connection points.



2. Put your mouse over the one you want to use and it will turn green.



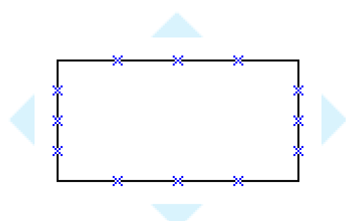
3. Click and then drag-drop the connector on the green dot of the corresponding connection point.



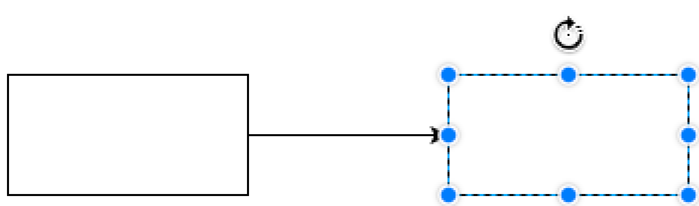
Cloning a Shape

To clone a shape:

1. Mouse over your shape to display its connection points. You will also see arrows on each side.



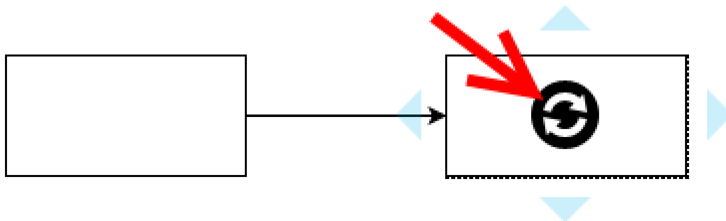
2. Click the arrow in the direction where you want the cloned shape.



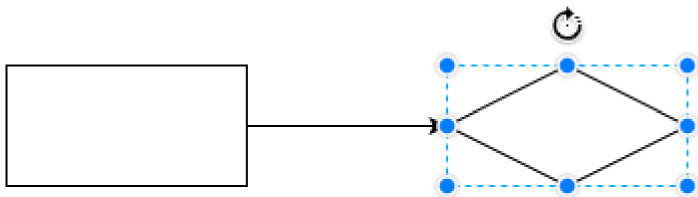
Changing a Shape Type

To change a shape from one type to another:

1. Select a shape from the gallery and drag it onto the middle of the existing shape you'd like to replace. The change icon appears:



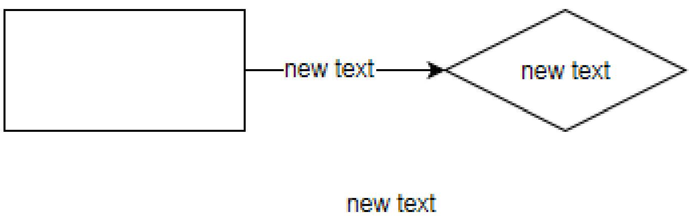
2. Drop the shape and it is replaced.



Adding Text to Shapes or Connectors

To add text to shapes or connectors:

Double click in a shape, in any white space, or on a connector line and type in your text.



Adding Links to Shapes

To add a link (URL) to a shape:

1. Right click a shape and select **Edit Link**.
2. Enter a URL in the **Edit Link** field.
3. Click **Apply**.

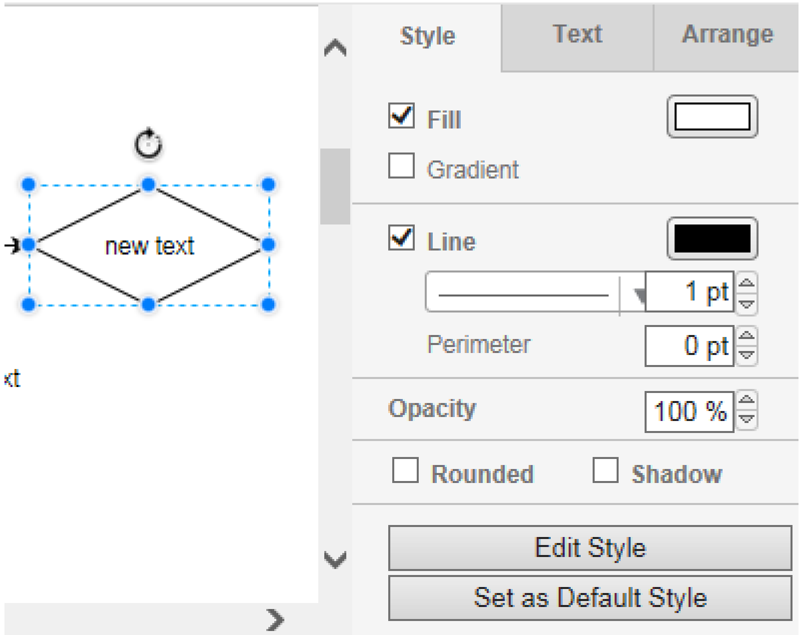
A few notes on links:

- Clicking the link opens a new tab in your web browser.
- Click the pen icon to edit a link.
- Links are only visible when the item is selected.
- Links can go on shapes or connectors.

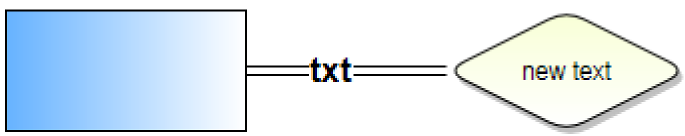
Modifying Properties of Shapes

To change an item's properties:

1. Select an item on the canvas to enable the properties panel on the right.



2. Use the **Style**, **Text**, and **Arrange** tabs to modify the appearance of your shape or connectors.



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 with Stories, Whiteboards, Concepts, Atlas Hub items, and Requirements in different projects.
- Concepts with Stories, Atlas Hub items and Concepts in different Whiteboards.
- Whiteboards and Stories.

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

Whiteboards and Concepts are arranged under one tab in a tree. The top level is the Whiteboard and the items below are the Concept contained within it. Drag the top-level to create a Relationship to the Whiteboard and subsequent Concepts or drag a Concept to create a Relationship to the individual Concept.

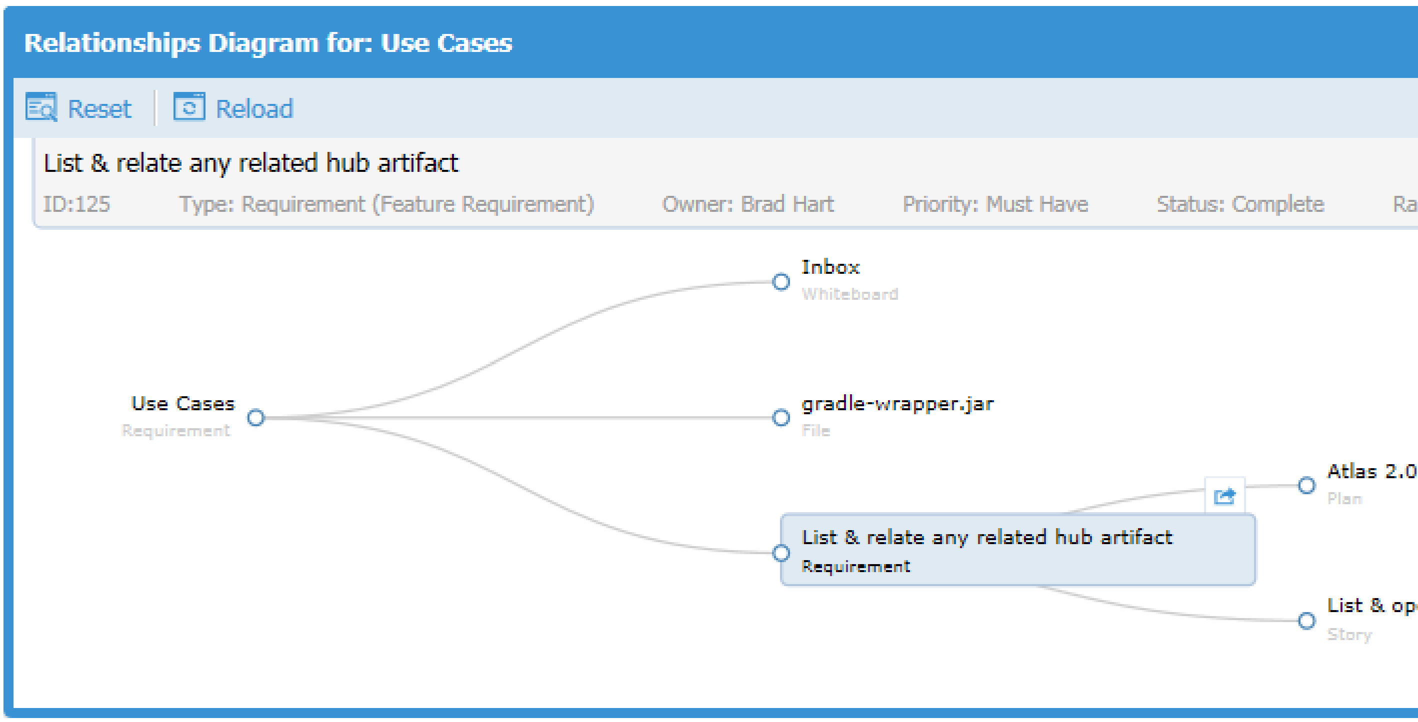
Watch how to do it: *Create a Relationship*.

Visualizing Relationships

Relationships are accessed from the **Relationships** tab and appear in a list. In certain perspectives, you can view your relationships in a diagram. When you see Diagram above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the requirement is in another project than the current one) are highlighted orange.
- Select an item and you will see summary information on the top of the window.
- Click (**Goto**) to go to the item in a new browser window/tab.
- The diagram is an infinite scrolling canvas that can be panned via click and drag, and zoomed via the scroll wheel.
- Click **Reset** to restore the default pan/zoom.
- Click **Reload** to refresh the diagram.
- Although item names are fixed-length on the diagram, hovering over an item displays a tool-tip with an asset's full Name, ID, Type, and Project Name.

Relationship Diagram Example



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. Atlas Hub items display according to the defaults or, in the case of custom Atlas Hub items, according to what the administrator created. Atlas Hub items are displayed in the **Other** tab and are organized in folders and files in a file explorer format.

The items display as follows:

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 Atlas Hub.

1. Open the **Relationship** tab. The **Relationship** pane appears.
2. Scroll through the **Existing Relationships**. Each Relationship shows the status or details.

   Note: Select the status from the **Relationship Status** drop down list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** drop down list to group relationships.
3. Click **...** and choose to update or defer out-of-date relationships.

Creating a Relationship from a Concept

1. Click (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click **New Relationship**.
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. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
8. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
9. Select the type of relationship from the **Relationship Type** drop down list.

   The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
Copy	Creates a copy relationship. Provides a status such as up-to-date and deferred.
Dependent	Creates a dependency between the two items. Provides a status such as up-to-date and deferred.
Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.
10. Click **OK**.

Creating a Relationship from a Requirement

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

3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.

   By default, the current Project is listed.
5. Click **New Relationship**.
6. In **Add Relationships**, click the tab for the item type. The list of items appear.
7. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
8. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
9. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
10. Select the type of relationship from the **Relationship Type** drop down list.

    The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
Copy	Creates a copy relationship. Provides a status such as up-to-date and deferred.
Dependent	Creates a dependency between the two items. Provides a status such as up-to-date and deferred.
Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.

11. Click **OK**.

Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click (**Actions**).
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or
6. Click **New Story**.
7. Accept the information provided or type new information in the appropriate fields.
8. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

Discussions

Throughout Atlas, you can use **Discussions** to have in-depth conversations about most assets. Discussions are available in the following locations:

- **Home**: Activity Feed.
- **Plan**: open a Plan and click **Open Review**.
- **Discussions** tab: for most other assets (Concept, Requirement, etc).

Tip: You can tag specific team members with the @ symbol followed by their user name to call them out and solicit their feedback. They will receive an email.

Agree/Disagree

At times during discussions, you may only want to voice your agreement or disagreement with a statement. Instead of writing your opinion, simply click or located next to the comment. Your name will be added accordingly to the agree or disagree lists associated with the discussion.

Watch how to: *Start a Discussion*.

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*.

Using Discussions 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 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.

Using Discussions with Plans

1. Click (**Plan**).
2. Double click a Plan to open it.
3. Click **Open Review**. The **Review Test** window appears containing the **Discussions** pane.
4. You can select the top level node in the tree to discuss the entire Plan, or you can select an individual item from the tree.
5. In the **Discussions** pane, click **New Topic** or reply to an existing one.
6. Click **OK**.

Starting a Discussion Topic

You can start a discussion from many stages along your planning cycle in Atlas.

From anywhere in Atlas where discussions are available, in the **Discussions** pane:

Watch how to do it: *Start a Discussion*.

1. Click **New Topic**.
2. Type a title in the **Subject** field.
3. Write a comment in the **Text** field.
4. Optionally to tag team members, type @ and the first letters of the user name to bring up the user list, then select the user name.
5. Click **OK**.

Replying to a Discussion from the Activity Feed

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 **Discussions** view appears, opened to the discussion topic selected from the **Activities** feed.
4. Click . The reply text box appears.
5. Type a reply and click **OK**.

Closing Discussions

After a discussion has run it's course and team members have come to a resolution, you can close a discussion with **Accept** or **Reject**. Click the down arrow next to the reply and select **Accept** or **Reject**. This closes the discussion and the team can no longer reply. However, the discussion thread can be expanded or collapsed for viewing.

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.

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**, **Extended Attributes**, etc) and displayed in a tree list.
7. Double click the **Description** field to view detailed differences in a new window. The **Detailed Differences** window shows exact text changes of the Requirement description.
8. Click **Options** > **Only show differences** to hide all items that haven't changed.
9. Click **Options** > **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**, **Extended Attributes**, etc) and displayed in a tree list.
10. Click **Options** > **Only show differences** to hide all items that haven't changed.
11. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

Synchronizing Requirements Overview

Many times the same Requirements are used for multiple Projects. Atlas provides the ability to reuse requirements by defining them once centrally, and connecting (synchronizing) them with other Projects. As related items are modified, individual item updates can be accepted, deferred or declined. This granular management ability provides consuming projects the ability to not only reuse centrally defined requirements, but to manage the flow and impact of changes.

The Requirements are synchronized to define the shared Requirements relationship. A synchronized Requirement is one whose description is linked to a shared requirement.

The Synchronization Source is the Requirement that provides the originating material. Any Project contributor where the Requirement resides can edit the Requirement.

The Synchronization Destination is the Requirement that displays the content of the Synchronization Source.

Requirements that have been synchronized are designated by the icon in the Requirements Tree.

Synchronizing Requirements

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

   This is your Synchronization Destination Requirement. You will pull the content from your Synchronization Source Requirement into this Requirement.
3. Click (**Actions**).
4. Select **Synchronize with Requirement**. The **Synchronize with Requirement** dialog appears.
5. Choose the **Project** in which the Synchronization Source resides.
6. Choose a Requirement from the **Requirements** list.

   This is your Synchronization Source Requirement.
7. Click **Synchronize**. The description from the Synchronization Source is propagated into the Synchronization Destination. The description in the Synchronization Destination cannot be edited.

You cannot link a Synchronization Source Requirement to a Synchronization Destination Requirement that is already synchronized to another Synchronization Source Requirement.

Removing Requirement Synchronization

1. Click (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click (**Actions**).
4. Select **Remove Requirement Synchronization**. The description remains, but is now editable. Any changes made in the Synchronization Destination or in the Synchronization Source will not affect each other.

Updating Requirement Synchronization

When the Status is out-of-date, you can choose to update the Synchronization Destination with the contents of the Synchronization Source.

1. Click (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click or click **Relationships** tab.
4. Click next to the Synchronization Source in the Synchronization Source Pane. The **Sync Status** changes to **Up to date** and the Synchronization icon changes to , indicating that the Requirements have been updated and are now current.

Deferring Requirement Synchronization

When the Status is out of date, you can choose to Defer the Synchronization. The Synchronization Destination continues to show outdated information until you decides to update.

1. Click (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click or click **Relationships** tab.
4. Click next to the Synchronization Source in the Synchronization Source Pane. The **Sync Status** changes to **Deferred** and the Synchronization icon changes to . You can update the Synchronization at any future time.

Comparing Synchronized Requirements

You can compare deferred or out-of-date synchronized requirements. The comparison displays the last synchronized version of the Synchronization Source and the most recent revision.

1. Click (**Define**).
2. Click **...** and choose **Manage Synchronizations**. The **Synchronized Requirements Manager** appears.

   Or you can select a requirement and click the **Relationships** tab.
3. Click . The **Compare Versions** dialog appears.

Synchronization Status Icons

The table below describes what each icon represents in the Synchronization Status. Hover over the icon to view details. Click the icon to open the Relationships tab.

Icon	Name	Description
	Not Synchronized	The Requirement is not synchronized.
	Up-To-Date	The Synchronization Destination displays the same content as the Synchronization Source.
	Deferred	The Synchronization Destination displays older content than the Synchronization Source. The user has selected to defer updating content.
	Out-Of-Date	The Synchronization Destination displays older content than the Synchronization Source.

Managing Synchronized Requirements

To view all synchronized requirements for a project, use the **Synchronized Requirements Manager**.

1. Click (**Define**).
2. Click **...** and choose **Manage Synchronizations**. The **Synchronized Requirements Manager** appears.

   The **Inbound** tab lists all the Synchronization Destinations for the project in the first column. The **Outbound** tab lists all the Synchronization Sources within the project in the first column. You can navigate the tabs depending upon what type of requirement you want to search.
3. Choose a **Sync Status** from the drop-down to narrow the list according to the status you choose.
4. Accept, defer, or update synchronizations on the **Inbound** tab.

Importing and Exporting Requirements

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

Watch how to do it: *Import/Export 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	ParentRequireme	Name	Type	MoSCoW	RichDescription	RequirementO	ExpectedEff
2	1		Policy Management	Theme	Must Have	Requirements fc	1	3
3	2	1	Add Vehicle Endorse	Initiative	Must Have	Types of Vehicle	2	1
4	3	1	Income protection Ir	Initiative	Should Have	Customers want	3	1
5	4	2	Add add Boat Policy	Feature Requirei	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.

Word documents do not map to other fields like a CSV file does. Import from Word reads headers and uses them as titles for Requirements. Everything else is placed in the Requirement description. The fields in the Requirement are set to their defaults.

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:

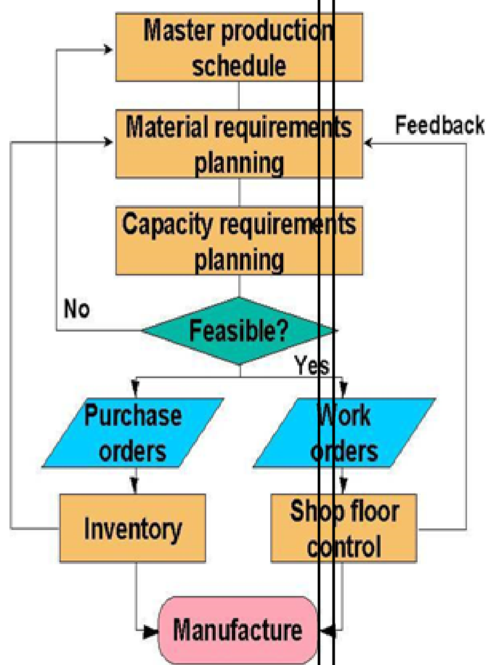
Material Requirements Planning (MRP)

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).

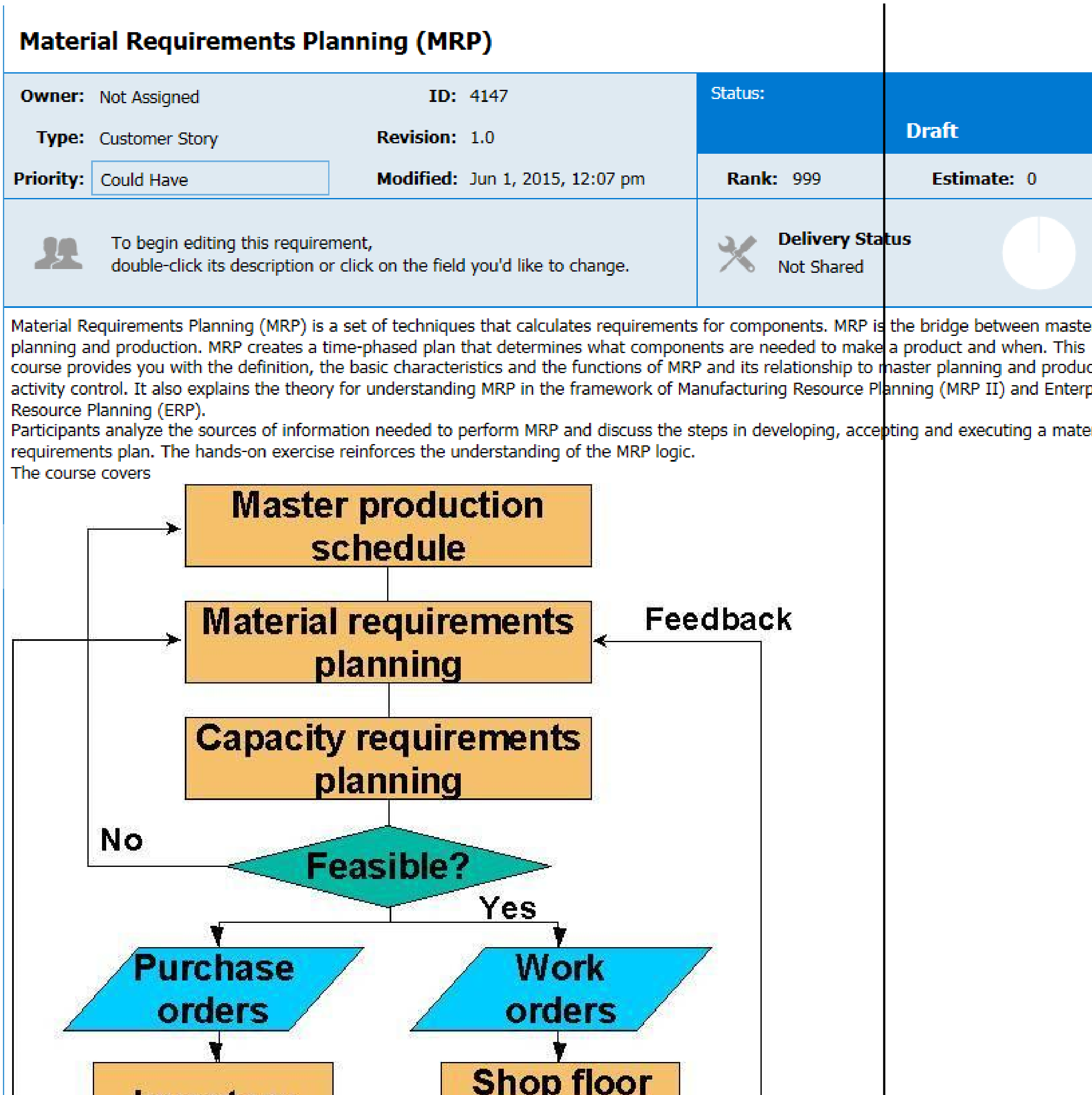
Participants analyze the sources of information needed to perform MRP and discuss the steps in **developing, accepting and executing a material requirements plan**. The hands-on exercise reinforces the understanding of the MRP logic.

The course covers

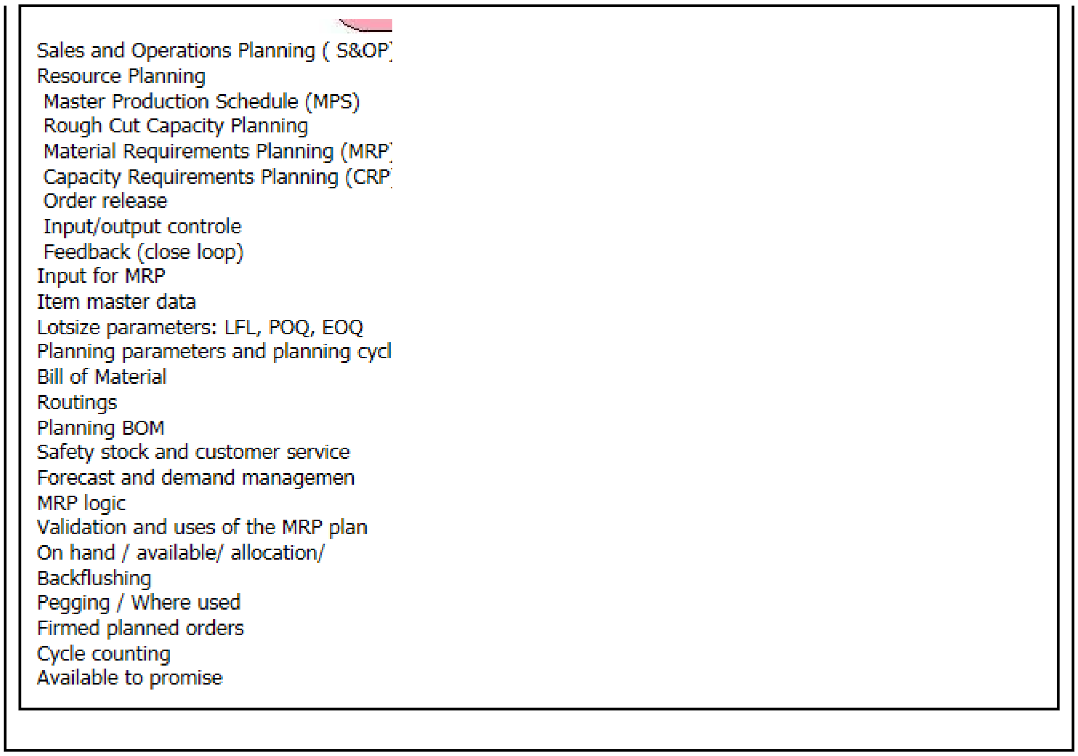
- Planning hierarchy
  - Sales and Operations Planning (S&OP)
  - Resource Planning
  - Master Production Schedule (MPS)
  - Rough Cut Capacity Planning
  - Material Requirements Planning (MRP)
  - Capacity Requirements Planning (CRP)
  - Order release
  - Input/output controle
  - Feedback (close loop)
- 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:



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 controle
Feedback (close loop)
Input for MRP
Item master data
Lotsize parameters: LFL, POQ, EOQ
Planning parameters and planning cycl
Bill of Material
Routings
Planning BOM
Safety stock and customer service
Forecast and demand managemen
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**.

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

Managing Requirement Date Planning

Agile teams move quickly, incrementally adding new capability sprint after sprint. The agile delivery team is dependent on requirement information to assure priorities/expectations are clearly understood upfront. When the project milestone planning (content, priority, purpose, and timing) side is not ready, the delivery team is left to make assumptions to fill in the gaps. This practice can lead to misaligned expectations and rework. Those on the business side need to align their milestone planning with the delivery team's sprints.

Atlas Requirement Date Planning enables Atlas users to define specific definition dates for features, and measure/track against those time-frames. By defining and tracking the project milestones, Atlas users can align their work with the delivery team, assuring business needs are available when requested by engineering.

Enabling Requirement Date Planning

Atlas provides the ability to define due dates for the definition of requirements, and to measure progress against those defined dates. Requirement Date Planning enables users to plan their definition work to align with internal milestones, or agile delivery team cadence.

To enable Requirement Date Planning, the Project Administrator adds the pre-defined UDA group **Requirement Date Planning** to any Requirement type. After it is added, all Requirements of that type will participate in a special workflow to assist in tracking definition progress.

By adding the **Requirement Date Planning UDA** group to a Requirement type, Requirements of that type list **Due Date** and **Completed Date** in their attributes.

The Requirement information pane will also display an indicator flag alerting the user to progress against the defined due date.

Requirements participating in this workflow will display progress against those dates in both the **`Definition Progress`** area of the home activity screen and the tracking Gantt.

Entering Due Date or Completed Date

The System Administrator must enable the Due Date and Completed Date User Defined Attributes.

To set a Due Date or to mark when a requirement is completed:

1. Click (**Define**).
2. Select the Requirement.
3. Click the **Attributes** tab.
4. Navigate to the **Requirement Date Planning** section.
5. Click **Due Date** or **Completed Date** to activate the field.
6. Type the date or click the to select a date.

Setting Status for a Requirements Date Planning

You can manually update the status of a requirement. When updating the status in a Requirement, the Completed and Target Date User Defined Attribute are accessible.

1. Click (**Define**).
2. Select the Requirement.
3. Click the **Status**. A list appears with all the possible status that your administrator created.
4. Select a status.
5. Click the **Attribute** tab to enter the information associated with the status.

Requirement Flag States

The following table describes the various flag states for Requirements Date Planning.

Flag	Name	Description
	No Attribute	If the Requirement does not have a Target Date or Completed Date UDA, no flag icon displays.
	Not Set	Requirement does not have a Target Date. Click to add one. This flag does not appear in the Gantt chart.
	Due Soon	Requirement has a target date and it is less than 7 days from today.
	Late	Requirement has a target date and it's past due and is not completed.
	Tracking	Requirement is tracking as scheduled.
	Due Today	Requirement is due today.
	Completed on Time	Requirement has a Completed Date entered before or on the Target Date.

Flag	Name	Description
	Completed Late	Requirement has a Completed Date entered after the Target Date.

Viewing Requirement Definition Status within Requirement

To view a Requirement Planning Date status in the Define view:

1. Click (**Define**).
2. Select the Requirement. Under the **Priority** field, you will see a status flag. Each flag represents the state of the Requirement. See the *Requirements Date Planning Flag States* topic for descriptions of each flag.
3. Hover over flag to view details.

Viewing Requirement Definition Status within Plan

To view status of Requirements within the Plan:

1. Click (**Track**).
2. Choose a Plan from the **Plan** list.
3. Find Requirement and view Flag state in Gantt chart.

   See the *Requirements Date Planning Flag States* topic for descriptions of each flag.
4. Hover over the Flag to view details.

Requirement Status

In Atlas, you cannot modify the Status of Agile Requirements. The value is taken from the value of the related Stories. For Requirements definition date planning, you can manually select a status value.

Use the following topics to work with the Status field.

Viewing Status for an Agile Requirement

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.

Setting Status for a Requirements Date Planning

You can manually update the status of a requirement. When updating the status in a Requirement, the Completed and Target Date User Defined Attribute are accessible.

1. Click (**Define**).
2. Select the Requirement.
3. Click the **Status**. A list appears with all the possible status that your administrator created.
4. Select a status.
5. Click the **Attribute** tab to enter the information associated with the status.

Creating a Requirement

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

Watch how to do it: *Creating 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

Use the steps below edit a Requirement.

Watch how to do it: *Edit 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**.

Working with User Defined Attributes

Your administrator may have created User Defined Attributes (UDAs). UDAs are custom fields designed for each specific Requirement Type.

To access the UDAs while creating a Requirement, click the **Attributes** tab. If you are in the Grid View, UDAs have their own columns.

The possible field types are Text, Number, List, Multi-select List, and Date.

Note: To add or remove data from a multiple selection list, click the . The list of available options appears. Select or deselect the items to add or remove them.

Copying and Pasting Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirement so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste.

1. Click (**Define**).

2. Choose a Requirement from the **Requirements** list.
3. Click **Copy** or choose **Copy** from the **Action** menu. The Requirement(s) copied (including list of Requirement IDs and Project ID) are stored in the clipboard. The information remains in the clipboard until another copy is performed. You can change perspectives, perform other actions, etc. and still come back and paste Requirements.
4. Click (**Home**).
5. Open the Project where you want to paste the Requirements.
6. Click (**Define**).
7. Place your cursor where you'd like to paste the requirements within the tree.
8. Click **Pase**, **Paste Above**, or **Paste Below**. The basic copy of the requirements are placed into the tree, including any attached files. Relationships and child Requirements do not copy and paste with the selected Requirements.

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**.

Viewing and Accessing Plans from the Requirements Tree

1. Click (**Define**).
2. Click the **Tree View** ().
3. Locate the Requirement.
4. Click the plan link by the Tracking chart.

   - If the Requirement is not associated with a Plan, the link states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
   - If the Requirement is associated with one Plan, the Plan name is a link. Click the link to open the Plan in View mode.
   - If the Requirement is associated with more than one plan, click the name to show a list. Click a name in the list to open the plan to open in View mode.

Viewing and Accessing Plans from the Requirements Grid

1. Click (**Define**).
2. Click the **Grid View** ().
3. Locate the Requirement and navigate to the Plan column.
   - If the Requirement is not associated with a Plan, the column states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
   - If the Requirement is associated with one Plan, the column contains the Plan name as a link. Click the link to open the Plan in View mode.
   - If the Requirement is associated with more than one plan, the column displays the Plan names in a comma-separated list. Click the list to open the **Plans for Requirement** dialog box. From this dialog, you can select the plan to open in View mode.

Viewing Test Results

When you synchronize Requirements or Stories with Atlas and a testing tool, Atlas can display the test results returned by your testing tool. In order to do this, your system administrator needs to use Micro Focus Connect to connect the two systems. See *Enabling Testing Tool Integration*.

After the systems are connected, you can use the following features to view test execution status:

Requirement Tracking Tab

In the **Define** perspective, open a Requirement and click the **Tracking** tab. You will see the **Tests** section. There are two graphs: **Latest Test Runs** and **Test Results Per Day**. The Latest Test Runs graph provides an aggregation of the statuses of all the Tests assigned to a Requirement (and its children, if any), as they appear the last time they were executed. **N/A** indicates Tests that are assigned to a Requirement but they have **never** been executed (e.g. brand new test). Latest Test Runs has the following:

- The **Duration** on the X-axis of the graph correlates to the duration supplied in the **Admin Tools**. The number of tests in the Y-axis is that of the selected item, plus it's children.
- Click the legend (`Passed`/`Failed`/`Not Run`) at the top of the graph to turn each one on/off.
- The **Goto** button takes you to the equivalent artifact in the integrated test tool.
- Hovering over an item gives you a tool tip with details.

Test Integration in Tracking Dialog (Gantt)

In the **Tracking** perspective, open a plan in the Gantt.

- There is a **Tests** column on the grid. Hover over the bars to view the details.
- In the **Change Overview** section when in **Time Machine** mode, there is a **Tests Count** section in the overview. This displays the test count change over time

Creating Tags

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

1. Navigate to either Concepts or Requirements and select the item you want to tag.
2. Click the **Tags** tab. The Tags panel appears.
3. Click **New Tag**. The **New Tag** dialog opens.
4. Type a name for the Tag and click **Save**. The new Tag appears in the **Tag** list.

Attaching a File to a Requirement

1. Click (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Attachments** tab. The **Attachments** panel appears.
4. Click **Attach File**. The **Attach File** dialog appears.
5. Click **Select**.
6. Browse to the file you want to attach.
7. Click **Add**. The file is added to the requirement and appears in the **Attachments** panel.

If there are several files attached to the Requirement, you can sort by time added or alphabetically. Click the relevant sort icon.

Click (**Download File**) next to the file name to download the file and open it in the appropriate application.

Retrieving a Deleted Requirement

The Recycle Bin retains all the deleted requirements from a Project. It displays the last 50 deleted Requirements. To aid in finding requirements, you can use Find or search within a month and year.

1. Click (**Define**).
2. Click (Recycle Bin).
3. Type the name of the Requirement in the **Find** field or click (calendar) and select month and year. The Requirements meeting your criteria are listed.
4. Select your Requirement.
5. Click (restore). The Requirement is restored to the Project, including any attachments.

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.

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.

Use the following sections to learn more about Plans.

Watch the tour: *Plan Tour*.

Discussions

Throughout Atlas, you can use **Discussions** to have in-depth conversations about most assets. Discussions are available in the following locations:

- **Home**: Activity Feed.
- **Plan**: open a Plan and click **Open Review**.
- **Discussions** tab: for most other assets (Concept, Requirement, etc).

Tip: You can tag specific team members with the @ symbol followed by their user name to call them out and solicit their feedback. They will receive an email.

Agree/Disagree

At times during discussions, you may only want to voice your agreement or disagreement with a statement.

Instead of writing your opinion, simply click or located next to the comment. Your name will be added accordingly to the agree or disagree lists associated with the discussion.

Watch how to: *Start a Discussion*.

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*.

Using Discussions 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 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.

Using Discussions with Plans

1. Click (**Plan**).
2. Double click a Plan to open it.
3. Click **Open Review**. The **Review Test** window appears containing the **Discussions** pane.
4. You can select the top level node in the tree to discuss the entire Plan, or you can select an individual item from the tree.
5. In the **Discussions** pane, click **New Topic** or reply to an existing one.
6. Click **OK**.

Starting a Discussion Topic

You can start a discussion from many stages along your planning cycle in Atlas.

From anywhere in Atlas where discussions are available, in the **Discussions** pane:

Watch how to do it: *Start a Discussion*.

1. Click **New Topic**.
2. Type a title in the **Subject** field.
3. Write a comment in the **Text** field.
4. Optionally to tag team members, type @ and the first letters of the user name to bring up the user list, then select the user name.
5. Click **OK**.

Replying to a Discussion from the Activity Feed

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 **Discussions** view appears, opened to the discussion topic selected from the **Activities** feed.
4. Click . The reply text box appears.
5. Type a reply and click **OK**.

Closing Discussions

After a discussion has run it's course and team members have come to a resolution, you can close a discussion with **Accept** or **Reject**. Click the down arrow next to the reply and select **Accept** or **Reject**. This closes the discussion and the team can no longer reply. However, the discussion thread can be expanded or collapsed for viewing.

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 with Stories, Whiteboards, Concepts, Atlas Hub items, and Requirements in different projects.
- Concepts with Stories, Atlas Hub items and Concepts in different Whiteboards.
- Whiteboards and Stories.

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

Whiteboards and Concepts are arranged under one tab in a tree. The top level is the Whiteboard and the items below are the Concept contained within it. Drag the top-level to create a Relationship to the Whiteboard and subsequent Concepts or drag a Concept to create a Relationship to the individual Concept.

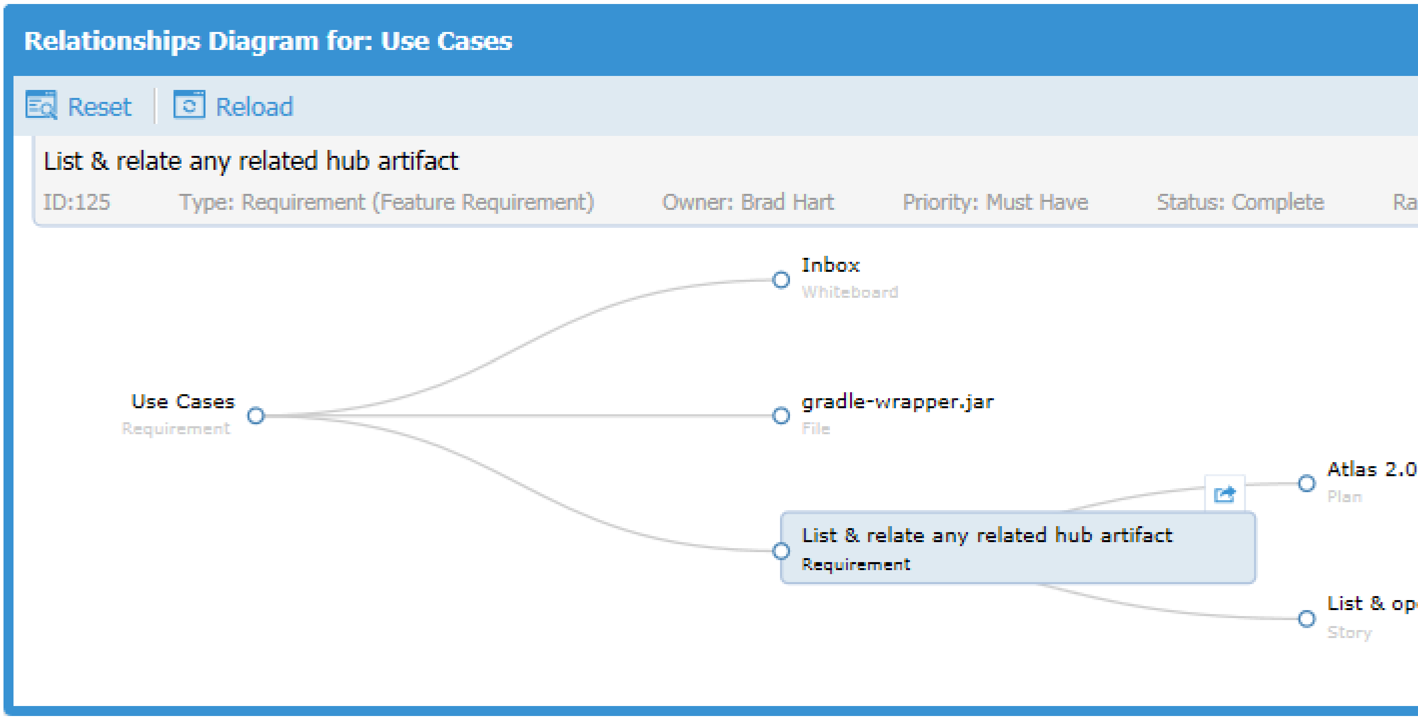
Watch how to do it: *Create a Relationship*.

Visualizing Relationships

Relationships are accessed from the **Relationships** tab and appear in a list. In certain perspectives, you can view your relationships in a diagram. When you see Diagram above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the requirement is in another project than the current one) are highlighted orange.
- Select an item and you will see summary information on the top of the window.
- Click (**Goto**) to go to the item in a new browser window/tab.
- The diagram is an infinite scrolling canvas that can be panned via click and drag, and zoomed via the scroll wheel.
- Click **Reset** to restore the default pan/zoom.
- Click **Reload** to refresh the diagram.
- Although item names are fixed-length on the diagram, hovering over an item displays a tool-tip with an asset's full Name, ID, Type, and Project Name.

Relationship Diagram Example



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. Atlas Hub items display according to the defaults or, in the case of custom Atlas Hub items, according to what the administrator created. Atlas Hub items are displayed in the **Other** tab and are organized in folders and files in a file explorer format.

The items display as follows:

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 Atlas Hub.

1. Open the **Relationship** tab. The **Relationship** pane appears.
2. Scroll through the **Existing Relationships**. Each Relationship shows the status or details.

   Note: Select the status from the **Relationship Status** drop down list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** drop down list to group relationships.
3. Click **...** and choose to update or defer out-of-date relationships.

Creating a Relationship from a Concept

1. Click (**Gather**).
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click **New Relationship**.
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. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
8. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
9. Select the type of relationship from the **Relationship Type** drop down list.

   The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
Copy	Creates a copy relationship. Provides a status such as up-to-date and deferred.
Dependent	Creates a dependency between the two items. Provides a status such as up-to-date and deferred.
Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.
10. Click **OK**.

Creating a Relationship from a Requirement

1. Click (**Define**).
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.

   By default, the current Project is listed.
5. Click **New Relationship**.
6. In **Add Relationships**, click the tab for the item type. The list of items appear.
7. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
8. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.

9. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
10. Select the type of relationship from the **Relationship Type** drop down list.

    The options vary depending upon the items to which you create a relationship.

Option	Description
Basic Relationship	Marks the association between the two items, but does not provide a status.
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Break down	Indicates the relationship is a break down of the larger item. Provides a status such as up-to-date and deferred. Break down also calculates in the tracking data and rolls up to the parent requirement.

11. Click **OK**.

Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click (**Actions**).
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or
6. Click **New Story**.
7. Accept the information provided or type new information in the appropriate fields.
8. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

Creating a Plan

Follow the steps below to create a Plan.

Watch how to do it: *Create 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.

   You can also order the requirements. The order is retained for the specific Plan and doesn't affect other Plans in or across Projects.
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

Follow the steps below to edit a Plan.

Watch how to do it: *Edit 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.

Opening a Requirement from a Plan

1. Click (**Plan**).
2. Choose a Plan from the **Plan** list.
3. Click (**Actions**).
4. Choose **Open**.
5. Choose **Quick Look**.

Choosing **Open** opens a new tab in the browser directly to the Requirement. Choosing **Quick Look** opens a dialog box containing the Requirement information.

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. If the Plan is new, 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.

   If editing the Plan, a confirmation dialog appears. Select **Create new Stories for each Requirement in the Plan** or **Only creat Storeis for new Requirements**, and click **Ok**.

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 delivery progress of a Requirement across several Projects with the Projects column and view of associated stories in each project.
- View the total Plan delivery status.

Watch the tour: *Track Tour* or *Track Plan Details* or *Track Requirement Info*.

Managing Requirement Date Planning

Agile teams move quickly, incrementally adding new capability sprint after sprint. The agile delivery team is dependent on requirement information to assure priorities/expectations are clearly understood upfront. When the project milestone planning (content, priority, purpose, and timing) side is not ready, the delivery team is left to make assumptions to fill in the gaps. This practice can lead to misaligned expectations and rework. Those on the business side need to align their milestone planning with the delivery team's sprints.

Atlas Requirement Date Planning enables Atlas users to define specific definition dates for features, and measure/track against those time-frames. By defining and tracking the project milestones, Atlas users can align their work with the delivery team, assuring business needs are available when requested by engineering.

Enabling Requirement Date Planning

Atlas provides the ability to define due dates for the definition of requirements, and to measure progress against those defined dates. Requirement Date Planning enables users to plan their definition work to align with internal milestones, or agile delivery team cadence.

To enable Requirement Date Planning, the Project Administrator adds the pre-defined UDA group **Requirement Date Planning** to any Requirement type. After it is added, all Requirements of that type will participate in a special workflow to assist in tracking definition progress.

By adding the **Requirement Date Planning UDA** group to a Requirement type, Requirements of that type list **Due Date** and **Completed Date** in their attributes.

The Requirement information pane will also display an indicator flag alerting the user to progress against the defined due date.

Requirements participating in this workflow will display progress against those dates in both the **`Definition Progress`** area of the home activity screen and the tracking Gantt.

Entering Due Date or Completed Date

The System Administrator must enable the Due Date and Completed Date User Defined Attributes.

To set a Due Date or to mark when a requirement is completed:

1. Click (**Define**).
2. Select the Requirement.
3. Click the **Attributes** tab.
4. Navigate to the **Requirement Date Planning** section.
5. Click **Due Date** or **Completed Date** to activate the field.

6. Type the date or click the to select a date.

Setting Status for a Requirements Date Planning

You can manually update the status of a requirement. When updating the status in a Requirement, the Completed and Target Date User Defined Attribute are accessible.

1. Click (**Define**).
2. Select the Requirement.
3. Click the **Status**. A list appears with all the possible status that your administrator created.
4. Select a status.
5. Click the **Attribute** tab to enter the information associated with the status.

Requirement Flag States

The following table describes the various flag states for Requirements Date Planning.

Flag	Name	Description
	No Attribute	If the Requirement does not have a Target Date or Completed Date UDA, no flag icon displays.
	Not Set	Requirement does not have a Target Date. Click to add one. This flag does not appear in the Gantt chart.
	Due Soon	Requirement has a target date and it is less than 7 days from today.
	Late	Requirement has a target date and it's past due and is not completed.
	Tracking	Requirement is tracking as scheduled.
	Due Today	Requirement is due today.
	Completed on Time	Requirement has a Completed Date entered before or on the Target Date.
	Completed Late	Requirement has a Completed Date entered after the Target Date.

Viewing Requirement Definition Status within Requirement

To view a Requirement Planning Date status in the Define view:

1. Click (**Define**).
2. Select the Requirement. Under the **Priority** field, you will see a status flag. Each flag represents the state of the Requirement. See the *Requirements Date Planning Flag States* topic for descriptions of each flag.
3. Hover over flag to view details.

Viewing Requirement Definition Status within Plan

To view status of Requirements within the Plan:

1. Click (**Track**).
2. Choose a Plan from the **Plan** list.
3. Find Requirement and view Flag state in Gantt chart.

   See the *Requirements Date Planning Flag States* topic for descriptions of each flag.
4. Hover over the Flag to view details.

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

Follow the steps below to track Requirement Type progress.

Watch how to do it: *Track Requirement Info*.

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**.

Opening Requirements and Stories from Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart.

1. Click (**Track**).
2. Double-click a Plan from the **Plan** list.
3. Navigate to the item you want to open.
4. Click (**Go To**).

The item opens in a new browser tab.

Viewing Test Results

When you synchronize Requirements or Stories with Atlas and a testing tool, Atlas can display the test results returned by your testing tool. In order to do this, your system administrator needs to use Micro Focus Connect to connect the two systems. See *Enabling Testing Tool Integration*.

After the systems are connected, you can use the following features to view test execution status:

Requirement Tracking Tab	In the **Define** perspective, open a Requirement and click the **Tracking** tab. You will see the **Tests** section. There are two graphs: **Latest Test Runs** and **Test Results Per Day**. The Latest Test Runs graph provides an aggregation of the statuses of all the Tests assigned to a Requirement (and its children, if any), as they appear the last time

they were executed. **N/A** indicates Tests that are assigned to a Requirement but they have **never** been executed (e.g. brand new test). Latest Test Runs has the following:

- The **Duration** on the X-axis of the graph correlates to the duration supplied in the **Admin Tools**. The number of tests in the Y-axis is that of the selected item, plus it's children.
- Click the legend (`Passed`/`Failed`/`Not Run`) at the top of the graph to turn each one on/off.
- The **Goto** button takes you to the equivalent artifact in the integrated test tool.
- Hovering over an item gives you a tool tip with details.

Test Integration in Tracking Dialog (Gantt)

In the **Tracking** perspective, open a plan in the Gantt.

- There is a **Tests** column on the grid. Hover over the bars to view the details.
- In the **Change Overview** section when in **Time Machine** mode, there is a **Tests Count** section in the overview. This displays the test count change over time

Using the Time Machine

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 created 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 (**Time Machine**).
5. Click **Save** to save the point in time without creating a Label.
6. 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 Atlas 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 Details of Differences

After selecting a past date or a Label from the Time Machine, click the **Details** tab to view details of the differences between the two states.

The **Details** tab contains three panes:

Overview	Contains a summary of changes to delivery dates, estimates, number of Requirements, and number of Stories.
Requirements	Lists added, removed, and updated Requirements. Click a Requirement to go directly to the Requirement within the **Requirements** Tree.
Stories	Lists the added, removed, and updated Stories. Click a Story to open it in your Agile tool.

Search

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

Select the button for the types that you want to search.

Select current project, all projects, or a specific project from the **Only show results from** list.

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

Atlas does not search common words, such as "and," "if," "else," then," and etc. These common words are referred to as *stop* words because they are used so often that the search would return too many non-specific results. To view the full list of stop words or to add your company-specific stop words, open `C:\Program Files\Micro Focus\Hub\Search\config\en_stopwords.txt`.

Atlas gives priority to title, content, description, and snippets when matching the query to items it will display in results. All other field items are lower priority.

To filter the search by specific assets, click a tab next to **View**.

To the right of each search result, there are icons to use:

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.

Using Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

To create a Filter:

1. Click (**Filter**). The **Filter** dialog box appears.
2. Click (**New Filter**). The editable filter field appears in the right panel.
3. Type a name for the filter.
4. Select **Project** if the filter is for the project only or select **Shared** if the filter is for all projects.
5. In the initial **Where** clause group, select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
6. Select an operator from the **Conditions** list (for example., `begins with`, >=, `>`, etc.).
7. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
8. Optional: Click **Add Query Rule** to add a new row to the current **Where** clause group.
9. Optional: Click **[Add Group]** to add another level to the filter. **And/Or** options appear.

   You can add additional groups by repeating these steps.
10. Optional: Click **And** to change it to **Or**.
11. Click **Save**. The filter appears in the filter list.

Using Saved Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

1. Click (**Filter**). The **Filter** dialog box appears.
2. If you have saved a Filter, click the Filter in **Saved Filters** list and click **Apply**. All results matching the filter criteria appear in the results.
3. To stop the applied filter, open the **Filter** dialog box and click **Clear Applied Filter**.

Duplicating Filters

You can duplicate an existing filter and use to use it to create another filter.

1. Click (**Filter**). The **Filter** dialog box appears.
2. Select the filter you would like to duplicate from the **Filter** list.
3. Click (**Duplicate Filter**). A new filter appears in the filter list, named the same as the originating filter with **-copy** ammended to it and the filter information appears in the right pane.
4. Rename the filter.
5. Amend filter criteria.

6. Click **Save**.

Deleting Filters

If you no longer need a filter, you can delete them in order to keep an uncluttered filter list.

1. Click (**Filter**). The **Filter** dialog box appears.
2. Select the filter you would like to delete from the **Filter** list.
3. Click (**Delete**). The filter is deleted from the list.

Quick Filters

Use a *Quick Filter* to quickly find a Requirement in the Define perspective.

Click the **Quick Filters** list and select the filter.

Click **Clear Filter** to remove the filter.

Atlas Team

About

Atlas Team is an agile project tracking tool designed to allow you to:

- Organize, prioritize, and manage your Agile teams' backlogs.
- Plan your sprints, task out the work, and then track progress throughout the sprint.
- Get comprehensive visibility of all your Agile assets.

Featured Sections

Administration
Planning
Team Room
Tracking

Getting Started with Atlas Team

Welcome to Atlas Team! Atlas Team is an Agile/Scrum delivery management platform where Agile execution teams plan, status and track their work. Agile teams can organize their backlog, plan releases and sprints, run daily stand-ups, and track delivery progress.

When Atlas Team is used together with the Atlas Requirements capabilities, the Atlas Planning and Tracking Suite provides full program definition and delivery management - keeping the business in sync with the delivery team.

Important: Before proceeding, make sure you are familiar with the ways in which Atlas and Atlas Team integrate. See *Using Atlas Team with Atlas*.

1. **Create a Project**
   The administrator can use an existing Atlas Project or *create a new Atlas Team Project*.
2. **Build and break-down the Backlog**
   The Product Owner needs to:

   a) Push Requirements from Atlas into Atlas Team as Epics. See *Using Atlas Team with Atlas*.
   b) *Breakdown Epics into consumable Stories for the project team*.

3. **Groom the Backlog for delivery planning**

   The Product Owner should:

   a) *Refine and Rank the Backlog*.
   b) *Target Stories for a Release*.

4. **Plan the Sprint and Release Timeboxes**

   a) The Scrum Master should define one or more of the product's Releases:

      - *Create a Release*.
      - *Set the Weekly Capacity of a Release*.

   b) For Sprints, the Scrum Master needs to:

      - *Create a Sprint from the Backlog*.
      - *Set the Sprint's Capacity*.

5. **Sprint Planning**

   a) The product team should conduct a planning meeting in order to *estimate Stories* and *create Tasks*.
   b) After the Stories are estimated, the team and Scrum Master need to *Add Stories to the Sprint* from the **Planning** > **Backlog** > **Sprint Panel**, keeping in mind the indicators provided in the **Sprint Health** area. If you are over capacity, it will tell you. It also indicates if Tasks/Stories are/are not estimated and have owners.

6. **Sprint Execution**

   When the team is in agreement upon the Stories, the team should commence work and use Atlas Team every day in the *Team Room*. Use the Team Room's **List View** and **Card View** to do the following:

   - The Scrum Master runs the daily stand ups, checking on the Sprint health.
   - The project team members *add work hours to Tasks* and Status them as needed.
   - The Product Owner uses the Team Room to *Accept* Stories as they are completed.

7. **Release Tracking**

   The Product Owner and other stakeholders monitor the Release in the *Tracking* perspective.

Using Atlas Team with Atlas

Atlas Team and Atlas are two of the main components of the Atlas Planning and Tracking Suite. You use Atlas to define, capture, and track the business needs of the organization as Requirements. You use Atlas Team to plan, status, and track the day-to-day Agile activities of the project team. Atlas pushes Requirements into Atlas Team as Epics where the product team breaks them down into smaller consumable Stories. These Stories are then worked through the full Agile process. Daily status, state and all related tracking data is integrated back into Atlas for real-time portfolio visibility for all stakeholders.

The specific integration points are as follows:

Projects

You can create new projects in Atlas Team, but Projects are *common* between Atlas and Atlas Team so any Project created in one is available in the other. For more information, see *Working with Projects*.

Users

Important: Although Users are common between Atlas and Atlas Team, the administrator needs to set project access rights for each user. See *Setting Project Access Rights*.

Starting and Logging In

You can open Atlas Team from within Atlas (and vice-versa, see *Starting Atlas Team*), but there are other ways to start the application:

- An administrator logged into the install machine can use the **Start** menu to launch Atlas Team: **Start** > **All Programs** > **Micro Focus** > **Atlas** > **Atlas Team**.
- Other team members can navigate to: `http://<hostname>/atlas/#perspective=agile` to start Atlas Team.

Requirements

Requirements from Atlas are pushed into Atlas Team as Epics, using one of the following methods:

Individual Requirement	From the Gear menu ( ) of a Requirement, select **Send to delivery Backlog**.
Full Plans	In the Atlas **Plan** perspective, edit a plan and click **Send to delivery Backlog**.

Starting Atlas Team

1. With Atlas opened, hover over the **Select Application** button and click it to display the options.

2. Select **Atlas Team**. A new browser tab opens the application.

Home

The Atlas Team **Home** perspective provides access to the following:

Projects	Projects display and can be managed on the left side of the Home page. See *Working with Projects*.
System Administration Admin Tools	Administrators use the System's **Admin Tools** to manage Users and to set Project access rights. See *Administration*.
Activity Feed Activity	The **Activity** feed displays in the **Home** perspective. You can see all recent Story activity. See *Using the Activity Feed*.

Using the Activity Feed

The primary use for the **Activity** feed is to display a list of Stories that have recently been modified. You can do the following:

Limit Stories that display	Click the calendar to select the **Start Date** for the **Activity** feed. Click Pin Now to have the Calendar start at the current day-time.
See the Work Progress	Hover over a Story's Status bar and it displays the **Actual Work** and **Estimated Work** hours for all the Tasks in the Story. For example: Worked hours: 1.1 Estimated hours: 3.5
Open a Story	Click **Goto Story** to the far right to open the Story.

Comparing Version Differences	Click **View Changes** to open the **Compare Versions** dialog box. See *Viewing Changes in a Story*.

Viewing Changes in a Story

The **Compare Versions** dialog box allows you to view two different versions of a Story. The fields appear in a grid in two columns next to each other.

1. Click **Home**.
2. In the **Activity** feed, select a Story and click **View Changes**. The **Compare Versions** dialog box opens with two columns displaying the changes next to each other.
3. Click **Options** > **Only show differences** to limit the grid to fields that have changed.
4. Click **Options** > **Extended Attributes** to show all fields including **Extended Attributes**.

Administration

This section contains information that is relevant to administrators. There are some tasks that only administrators can perform.

User Account Management

User management includes adding users to the system as well as managing project teams. Only administrators can add people to the system. Once a user is added, they can create Projects and project teams.

Once you add a project team to a Project, the Project will only be visible to team members. It is visible to everyone until you create the project team.

Roles

There are four roles within the system:

Server Administrator	Responsible for managing StarTeam Agile and the servers. This role can do everything including managing people and create new projects.
Project Administrators	Responsible for their projects only. They cannot add users to StarTeam Agile or create new projects. Once the Administrator creates the project and adds the user as Project Administrator, the project administrator can add team members to their project and manage all aspects of the project.
Project Contributors	Responsible for doing the work required to complete the project. They can do everything within the project except edit the project, create or edit releases, and add people to the project team.
Project Viewers	These are the stakeholders. They can view everything within the project but cannot make any changes.

A user can have multiple roles based on the projects they are working on. For example, a project administrator for `Project A` could be a `Project Viewer` on `Project B` while a viewer on `Project B` could be a contributor for `Project A`. The roles and permissions are project based, with the exclusion of the `Server Administrator`.

Adding Users

Only Administrators can add users to the system. Once user accounts have been created, then project managers can add them to project teams.

1. Log in to the system with an `Administrator` account.

2. Click the **Home** perspective.
3. Click **Admin Tools**.
4. Click the **Users** tab.
5. Click **New User**.

Logon Name	Enter the name with which the user will use to log on.
Password	Enter the user's password. This can be changed by the user later.
Name	Enter the name of the user as you want it to appear within the system. This the name that will appear on Stories, Tasks, etc.

Editing Users

1. Log in to the system with an `Administrator` account.
2. Click the **Home** perspective.
3. Click **Admin Tools**.
4. Click **Find User** at the bottom and enter the user's name in the search field. The matching users will appear below the search box.
5. Edit the proper fields.
6. Click **Save**.

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.

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. In the **View** pane, there are two sections: **Atlas** and **Atlas Team**. Each has **Viewers** and **Contributors** buttons. Click one of the 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.

Working with Projects

Projects contain Backlogs, Releases, and Sprints. You can add or edit Projects in the **Favorite Projects** or **Available Projects** lists on the **Home** perspective.

Use the **Project Access Rights** tab in **Admin Tools** to limit which users can see the project.

Important: Any Projects that you create in Atlas are automatically available in Atlas Team so you don't need to re-create them. However, you will still need to set project access rights for each user. See *Setting Project Access Rights*.

Creating a Project

The first step to managing your Projects is to create a project to organize your Backlog and manage your Sprints.

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 (`Public` or `Restricted`) from the list.
5. Enter the **Project Description**.
6. Click **Save**.

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

After creating your Project, you need to set up user access to the Project. See *Setting Project Access Rights*.

Editing a Project

1. Click (**Home**).
2. Click **Edit** () in the **Favorite** or **Available Projects** list. The **Edit Project** dialog box appears.
3. Make changes to the Project **Name** or **Description**.
4. Click **Save**.

Planning

High performing agile teams organize and plan their work. The Atlas Team **Planning** perspective enables teams to capture and manage their Backlog, organize and breakdown their Stories, as well as define the timeboxes in which they are incrementally delivered.

About Stories

A *User Story* is a definition of a discreet unit of work to perform on your product. They exist in a *backlog* or in a Sprint and are modified with the **Story Editor**.

Stories can be any of the following types:

User Story Used to capture the description of a software feature from an end-user perspective. It helps create a simple description of a Requirement.

Epic	An *Epic* encapsulates a large body of work or numerous Stories. It should be broken down into numerous smaller Stories.
Theme	A theme is used to track of group of Stories that share common traits and can be grouped together.
Tech To Do	Describes a Story that usually contains technical debt.
Defect	Used to track actual product Defects

Atlas Team provides many views for you to create, to edit, and to manage your Stories:

- *Breakdown View*
- *Backlog View*
- *Team Room*

Creating a Story

You can create *Quick* or *Detailed* Stories in the **Planning** > **Breakdown** and **Planning** > **Backlog** views.

Use *Quick Story* when you are adding lots of high level Stories. Then, go back to fill in the details with *Detailed Story*.

In each perspective, look for **New Story**: **Quick | Detailed**.

To create a detailed story:

1. Click **New Story: Detailed**.
2. Enter the details for the Story:

Name	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Epic`, `Theme`, `Defect`, or `Technical To Do`. For more information about Types, see *Working with Stories*.
Points	Enter the estimated number of story points required to complete the Story.
Status	Click one of the boxes indicating the status: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Priority	Select a priority from the list: `Must Have`, `Could Have`, `Should Have`, or `Won't Have`.
Sprint	Select the Sprint for the Story, if needed.
Release	Select the Release for the Story, if needed.
Parent	The Parent Story is displayed. Click the link to display the Parent or click the **Set Parent** icon to change the parent.
Description	Add or edit the Story description.

3. Click **Save**.

Editing a Story

Use the steps below when you want to add more detail to a base Story or to begin adding tasks to a Story.

You can edit a Story in the **Planning** > **Breakdown** and **Planning** > **Backlog** views.

1. Click > **Open** to the left of a Story.

Tip: If you display the **ID** column, you can simply click the number in that column to edit the Story.

The **Edit Story** dialog box opens.

2. Enter the details for the Story:

Name	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Epic`, `Theme`, `Defect`, or `Technical To Do`. For more information about Types, see *Working with Stories*.
Points	Enter the estimated number of story points required to complete the Story.
Status	Click one of the boxes indicating the status: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Priority	Select a priority from the list: `Must Have`, `Could Have`, `Should Have`, or `Won't Have`.
Sprint	Select the Sprint for the Story, if needed.
Release	Select the Release for the Story, if needed.
Parent	The Parent Story is displayed. Click the link to display the Parent or click the **Set Parent** icon to change the parent.
Description	Add or edit the Story description.

3. To add Tasks to the Story, see *Adding Tasks to a Story*.

Targeting Stories for a Release

During release planning, product owners and managers review the Backlog and choose which Stories need to be included in the Release. The progress data for the Stories will be used to calculate the **Release Progress** and **Release Burnup** charts in the **Tracking** Perspective.

1. From the **Planning** perspective, select the Story you want to target for a release.
2. Click > **Assign to Release**. The **Assign to Release** dialog box opens.
3. Select a Release from the list and click **OK**.

Breakdown View

Click **Planning** > **Breakdown**.

The **Breakdown** view enables users to define and group Stories into a meaningful tree organization. The organization structure is user defined, allowing the creation of a tree structure that matches each individual project's needs. You can create new items inline, and use drag-drop to move items within the hierarchy.

Work items are broken down into Stories (using parent/child relationships) that make up the actionable Backlog. This is often done when a individual Story cannot be completed in an iteration or release. The individual Stories provide incremental progress toward the larger defined need.

Breaking Down a Story

While the **Backlog** is used to store the ranked, actionable work queue, the **Breakdown** view allows you to define and group Stories into a meaningful hierarchy. You use the **Breakdown** action to do this.

1. Click **Planning** > **Breakdown**.
2. Click > **Breakdown** to the left of the Story you want to break down. The **Create Story** box opens.

3. Select the **Type**.
4. Select the **Title**.
5. Click **Save & Close** if you are finished adding child Stories or click **Save & New** to add another child Story.

To edit the Stories further, see:

- *Editing a Story*
- *Adding Tasks to a Story*

Breakdown View Columns

Default Columns

The following columns display by default. If you modify them, your changes will be saved. For more information, see *Viewing Columns in Grids*.

ID Unique ID of the item. Read-only.

Name Item Name. In most cases, you can double click to edit.

Type Type is used as a way to categorize Stories. Available Story Types include: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. For more information, see *Working with Stories*.

Priority Priority is a list of values that includes the following: `Must Have`, `Should Have`, `Could Have`, or `Won't Have`.

Points Indicates the number of Story Points it is estimated to take to complete the Story.

Owner Indicates who is responsible for Story.

Status The **Status** column for a Story contains a bubble control that allows you to click on one of the bubbles to set the status of the Story: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.

Release Currently assigned Release for the Sprint. Double click to enable the list for choosing a new one.

Sprint The name of the current Sprint. Double-click to expose a list of available Sprints. Select a new one if desired.

Available Columns

Other columns include:

Blocked Blocked indicates that there is an issue outside of the teams control preventing progress. If a Task is blocked, the parent Story will display BLOCKED in the grid. Click the icon in the grid to block a Task. It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories.

Carried Over This column in the grid will display a special image CARRIED OVER representing that the Story was carried over from one sprint to the next (or more).

Revision Version number of the item. Read-only.

Last Edited Date that the item was last edited. Ready-only.

Author Name of the original author of the item. Read-only.

Created Date Date that the item was created. Ready-only.

Last Edited By Name of the last author who lasted edited the item. Read-only.

Backlog View

Click **Planning** > **Backlog**.

The **Backlog** view represents the ranked actionable work queue. This view is limited to schedule-able items (items without child Stories, and that are not already scheduled in a Sprint). Users come here to view/modify project priorities, and to quickly add work items to a Sprint.

The Story **Rank** is a numerical value used to represent a Story's position in the Backlog. Agile teams use Rank to identify relative priority and work sequence. When scheduling work (pulling items from the Backlog to a Sprint) Stories at the top of the backlog are traditionally scheduled for work first. Story Rank can be modified via drag & drop and direct edit. When you drag-drop a Story in the Backlog, the Rank is automatically updated to reflect its new position/ranking. You can also double click the field and manually edit the value.

You can also: *Create a Story*, *Open a Story*, *Assign Stories to a Release* and *Copy Tasks from Other Stories*.

Sprint Panel

Click **Planning** > **Backlog** > . This opens the **Sprint** Panel.

You create and edit Sprints in the Sprints Panel in the **Backlog**. Sprints belong to a Project and can be assigned to a Release.

Tip: To view a list of all of your Sprints, use **Planning** > **Timeboxes** and then select `Sprints` from the list. See *Sprints View*.

Some of the things you can do in the this panel include:

- *Drag-and-drop items from the Backlog into a Sprint.*
- *Create a Sprint from the Backlog*.
- *Change a Sprint's Capacity*.
- *Move a Story from One Sprint to Another*.
- *Edit a Story*.

Sprint Status

The top part of the Sprint panel contains the dashboard that you can use to gauge a sprint's health. You can review information about available/used points, items not estimated, items without owners, how many stories are true User Stories, and how many are Defects, etc.

Click **Capacity** to set the available capacity for your sprint (The number of Story points that you expect to be able to complete in a Sprint.).

Creating a Sprint from the Backlog

1. Click **Planning** > **Backlog**.
2. Expand the **Sprints** panel .
3. Click **New Sprint**. The **Create Sprint** dialog box appears.
4. Enter the **Sprint Name**.
5. Enter the **Capacity**.
6. Select the **Start Date** and **End Date**.
7. Select a **Release**.

8. Click **OK**.

You can also create a Sprint in the **Timeboxes** view. See *Creating a Sprint from Timebox View*.

Editing a Sprint

You can edit Sprints in two ways:

Planning > Timeboxes	Make sure `Sprints` are selected in the list. Click the **ID** next to the Sprint to edit.
Team Room	Click the **Edit Sprints** button on the far right.

1. The **Edit Sprint** dialog box appears.
2. From here, you can modify the **Name**, **Capacity**, **Dates**, and the assigned **Release**.
3. Click **OK**.

Adding a Story to a Sprint

Note: Parent Stories cannot be added to Sprints. Only the lowest level leaf item in your hierarchy can be added to a Sprint as a work item.

1. Click **Planning** > **Backlog**.
2. Expand the **Sprints** panel.
3. Select a Sprint from the **Sprints** list.
4. Select a Story from the Backlog by clicking it and then drag-drop it into the Sprint in the **Sprints** panel.

Sprint Panel Columns

Default Columns

The following columns display by default. If you modify them, your changes will be saved. For more information, see *Viewing Columns in Grids*.

ID	Unique ID of the item. Read-only.
Type	Type is used as a way to categorize Stories. Available Story Types include: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. For more information, see *Working with Stories*.
Name	Item Name. In most cases, you can double click to edit.
Points	Indicates the number of Story Points it is estimated to take to complete the Story.
Priority	Priority is a list of values that includes the following: `Must Have`, `Should Have`, `Could Have`, or `Won't Have`.
Status	The **Status** column for a Story contains a bubble control that allows you to click on one of the bubbles to set the status of the Story: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Owner	Indicates who is responsible for Story.

Available Columns

Blocked	Blocked indicates that there is an issue outside of the teams control preventing progress. If a Task is blocked, the parent Story will display BLOCKED in the grid. Click the icon in

the grid to block a Task. It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories.

Carried Over This column in the grid will display a special image representing that the Story was carried over from one sprint to the next (or more).

Revision Version number of the item. Read-only.

Last Edited Date that the item was last edited. Ready-only.

Author Name of the original author of the item. Read-only.

Created Date Date that the item was created. Ready-only.

Last Edited By Name of the last author who lasted edited the item. Read-only.

Release This is the name of any of the Releases defined in the Project. You can normally double-click to edit and then select any of the available Releases.

Columns in the Backlog

Default Columns

The following columns display by default. If you modify them, your changes will be saved. For more information, see *Viewing Columns in Grids*.

ID Unique ID of the item. Read-only.

Rank The Story **Rank** is a numerical value used to represent a Story's position in the Backlog. Agile teams use Rank to identify relative priority and work sequence. When scheduling work (pulling items from the Backlog to a Sprint) Stories at the top of the backlog are traditionally scheduled for work first. Story Rank can be modified via drag & drop and direct edit. When you drag-drop a Story in the Backlog, the Rank is automatically updated to reflect its new position/ranking. You can also double click the field and manually edit the value.

Name Item Name. In most cases, you can double click to edit.

Type Type is used as a way to categorize Stories. Available Story Types include: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. For more information, see *Working with Stories*.

Priority Priority is a list of values that includes the following: `Must Have`, `Should Have`, `Could Have`, or `Won't Have`.

Points Indicates the number of Story Points it is estimated to take to complete the Story.

Owner Indicates who is responsible for Story.

Release This is the name of any of the Releases defined in the Project. You can normally double-click to edit and then select any of the available Releases.

Other Available Columns

Blocked Blocked indicates that there is an issue outside of the teams control preventing progress. If a Task is blocked, the parent Story will display in the grid. Click the icon in the grid to block a Task. It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories.

Carried Over This column in the grid will display a special image representing that the Story was carried over from one sprint to the next (or more).

Last Edited	Date that the item was last edited. Ready-only.
Status	The **Status** column for a Story contains a bubble control that allows you to click on one of the bubbles to set the status of the Story: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Author	Name of the original author of the item. Read-only.
Created Date	Date that the item was created. Ready-only.
Last Edited By	Name of the last author who lasted edited the item. Read-only.

Timeboxes View

Click **Planning** > **Timeboxes**

Agile projects require both Sprints and Releases to incrementally delivery value. The **Timeboxes** view allows the creation and management of both. Users can view existing, modify, and fully manage Sprints and Releases.

Sprints View

Click **Planning** > **Timeboxes** and then select `Sprints` from the list.

The **Sprints** view shows you a list of all of the Sprints in your project.

Creating a Sprint from Timeboxes View

The following describes how to add a Sprint while you are in the **Timeboxes** view looking at all of your Sprints. You can also add a Sprint when you are in the Backlog. See *Creating a Sprint from the Backlog*.

1. Click **Planning** > **Timeboxes**
2. Select `Sprints` from the list.
3. Click **New**.
4. Enter the **Sprint Name**.
5. Enter the **Capacity**.
6. Select the **Start Date** and **End Date**.
7. Select a **Release**.
8. Click **OK**.

Columns in Sprints View

The following columns are available for viewing in the grid on this page. Show/hide columns: *Viewing Columns in Grids*.

ID	Unique ID of the item. Read-only.
Name	Item Name. In most cases, you can double click to edit.
Start Date	Planned Start Date of the Sprint.
End Date	Planned End Date of the Sprint.
Stories	Total number of Stories in the Sprint.
Assigned	This value is the total number of Story points of all Stories assigned to the Sprint.

Delivered	This value is the total number of Story points of all Stories that are in the `Accepted` or `Complete` states.
Capacity	The number of Story points that you expect to be able to complete in a Sprint.
Release	Currently assigned Release for the Sprint. Double click to enable the list for choosing a new one.
Author	Name of the original author of the item. Read-only.
Created Date	Date that the item was created. Ready-only.
Last Edited	Date that the item was last edited. Ready-only.
Last Edited By	Name of the last author who lasted edited the item. Read-only.
Revision	Version number of the item. Read-only.

Releases View

Click **Planning** > **Timeboxes** and then select `Releases` from the list.

The Releases View shows you a list of all of the Releases in your project.

Creating a Release

Use the **TimeBoxes** view of the **Planning** perspective to create/edit a Release.

Tip: To edit an existing Release, click the number in the **ID** column of the grid to open the **Edit Release** box.

1. Click **Planning** > **Timeboxes**.
2. Select `Releases` from the list in the toolbar.
3. Click **New**. The **Create Release** dialog box appears.
4. Edit the **Release Name**.
5. Edit the **Weekly Capacity**.
6. Select the **Start Date**.
7. Select the **End Date**.
8. Click **OK**.

Changing the Weekly Capacity of a Release

Do the following to change the default weekly capacity of a release.

1. Click **Planning** > **Timeboxes**.
2. Select `Releases` from the list in the toolbar.
3. Click the number in the **ID** column of the grid to open the **Edit Release** box. The **Edit Release** box appears.
4. Edit the **Weekly Capacity**.
5. Click **OK**.

Columns in Releases View

The following columns are available for viewing in the grid on this page. Show/hide columns: *Viewing Columns in Grids*.

ID	Unique ID of the item. Read-only.
Name	Item Name. In most cases, you can double click to edit.
Start Date	Planned Start Date of the Sprint.
End Date	Planned End Date of the Sprint.
Weekly Capacity	This release-level value is the weekly capacity available for each Sprint. You can modify this on the **Edit Release** dialog box. Each new Sprint that is created will use this as the **Capacity** value.
Total Capacity	This is the Release's total capacity. It is calculated by **Weekly Capacity** * Weeks in Release (**Start Date** to **End Date**). This is a read-only value.
Author	Name of the original author of the item. Read-only.
Created Date	Date that the item was created. Ready-only.
Last Edited	Date that the item was last edited. Ready-only.
Last Edited By	Name of the last author who lasted edited the item. Read-only.
Revision	Version number of the item. Read-only.

Working with Filters

Filtering your backlog simplifies the process of locating stories that match a certain criteria.

Creating a Filter

Use the **Filters** dialog box to create simple or complex multi-field, multi-level filters.

Note: You also use this dialog box to duplicate existing filters or delete filters.

1. Open the **Breakdown** or **Backlog** views in the **Planning** Perspective.
2. Click (**Filter**). The **Filter** dialog box appears.
3. Click (**New Filter**). The editable filter field appears in the right panel.
4. Type a name for the filter.
5. Select **Project** if the filter is for the project only or select **Shared** if the filter is for all projects.
6. In the initial **Where** clause group, select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.
7. Select an operator from the **Conditions** list (for example., `begins with`, `>=`, `>`, etc.).
8. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.
9. Optional: Click **Add Query Rule** to add a new row to the current **Where** clause group.
10. Optional: Click **[Add Group]** to add another level to the filter. **And/Or** options appear.

    You can add additional groups by repeating these steps.
11. Optional: Click **And** to change it to **Or**.
12. Click **Save**. The filter appears in the filter list.

Applying a Filter

To apply an existing filter:

1. Open the **Breakdown** or **Backlog** views in the **Planning** Perspective.

2. In the toolbar, select a filter from the **Filter** list. The items that match the filter criteria display below.

Team Room

The **Team Room** provides a team-centric view for recording/reviewing Sprint activities. The design is focused on enabling recurring team activities, both for updating work status and running the daily standup. It provides interactive story and task lists, as well as a simple to use task card view.

Sprint Status Pane

The top pane displays overall status of the selected Sprint. The top row contains **Remaining Days**, **Remaining Hours**, **Accepted** (% of all Stories in the *Accepted* state) and **Operating Capacity**. *Operating Capacity* is your current Story completion rate compared to the Sprint's **Capacity** value.

Sprint Status Graphs

The graphs in this pane can be expanded or collapsed using the arrow to the right. When collapsed, these charts can be expanded into a larger view by clicking **Zoom**.

Team Burndown	The **Team Burndown** chart is a run-chart of outstanding work that shows the total number of points on the vertical access with number of days on the horizontal access. This chart is used to help predict when the work will finish.
Points by Type	The **Points by Type** graph provides a pie chart of the percentage distribution of work based on the types of Stories.
Health & Progress	The information in this list contains data points of the Sprint that you need to be aware of: • Number of blocked Stories. • Stories not estimated. • Stories without Tasks. • Tasks not estimated. • Tasks with actual hours greater than estimated hours.

Team Room Views

Sprint List	Contains a list of the Stories contained in the selected Sprint. You can expand them to see the Tasks. You can also double click for in-line editing.
Sprint Cards	Contains a view of the Sprint's Stories and Tasks arranged in status columns: **Not Started**, **In Progress**, **Complete**. Drag and drop each story's card to change the status. Expand a Story to see and status the Tasks using the arrow on the right.

In the **Team Room**, you can also choose which columns to display. See *Team Room Columns* for a list of what is available.

Creating a Story

You can create *Quick* or *Detailed* Stories in the **Team Room** > **Sprint List** and **Team Room** > **Sprint Cards** views.

Use *Quick Story* when you are adding lots of high level Stories. Then, go back to fill in the details with *Detailed Story*.

In each perspective, look for **New Story**: **Quick | Detailed**.

To create a detailed story:

1. Click **New Story: Detailed**.
2. Enter the details for the Story:

Name	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Epic`, `Theme`, `Defect`, or `Technical To Do`. For more information about Types, see *Working with Stories*.
Points	Enter the estimated number of story points required to complete the Story.
Status	Click one of the boxes indicating the status: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Priority	Select a priority from the list: `Must Have`, `Could Have`, `Should Have`, or `Won't Have`.
Sprint	Select the Sprint for the Story, if needed.
Release	Select the Release for the Story, if needed.
Parent	The Parent Story is displayed. Click the link to display the Parent or click the **Set Parent** icon to change the parent.
Description	Add or edit the Story description.

3. Click **Save**.

Editing a Story

Use the steps below when you want to add more detail to a *Quick Story* or to begin adding tasks to a Story. You can edit a Story in the **Team Room** > **Sprint List** and **Team Room** > **Sprint Cards** views.

1. Click > **Open** to the left of a Story.

   Tip: If you display the **ID** column, you can simply click the number in that column to edit the Story.

   The **Edit Story** dialog box opens.
2. Enter the details for the Story:

Name	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Epic`, `Theme`, `Defect`, or `Technical To Do`. For more information about Types, see *Working with Stories*.
Points	Enter the estimated number of story points required to complete the Story.
Status	Click one of the boxes indicating the status: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.
Priority	Select a priority from the list: `Must Have`, `Could Have`, `Should Have`, or `Won't Have`.
Sprint	Select the Sprint for the Story, if needed.
Release	Select the Release for the Story, if needed.
Parent	The Parent Story is displayed. Click the link to display the Parent or click the **Set Parent** icon to change the parent.
Description	Add or edit the Story description.

3. To add Tasks to the Story, see *Adding Tasks to a Story*.

Adding Tasks to a Story

Tasks are the units of work used to define a Story. Tasks contain work records to track individual hours.

You can create a *Quick Task* or a *Detailed Task*.

Tip: You can copy all Tasks from an existing Story by clicking **Copy From** on the toolbar. You'll navigate the list of Stories and select the one you from which you want to import the Tasks.

Tip: You can click the gear menu and select **Add Task** to add a Quick Task (`Type`, `Title`).

1. Open an existing Story.
2. The Tasks for the Story are listed in the bottom pane.
3. Click **Detailed Task**. The **Task Editor** appears.
4. Enter the details for the Task:

Name	Enter a descriptive name for the Task.
Owner	Select who will performing the Task.
Type	Select the type of Task it is: `Development`, `QA`, or `Documentation`.
Estimate	Enter the estimate of the number of work hours required to complete the Task.
Status	Click one of the Status boxes: `Not Started`, `In Progress`, or `Complete`.
Blocked	Click to block the Task. For more information, see *Blocking a Task*.
Actual	Displays the actual number of hours that have been worked on the Task.
To Do	Displays the number of remaining hours to complete the Task. See *Adding Work Hours to a Task*.
Description	Enter the information required for the task **Owner** to complete the Task. You can also include links to documents that may be stored elsewhere.

5. Click **Save**.

Copying Tasks from Other Stories

If you find that you often use the same set of Tasks in a Story, you can set up a generic Story with all the Tasks you need and then import the Tasks into any new Story you create.

1. In the **Backlog** or **Team Room**, click > **Copy Tasks From...** The **Copy Tasks From** dialog box appears.
2. Navigate to the Story that contains the Tasks you want and select it.
3. Click **Copy**. The Tasks are added to the Story.

Adding Work Hours to a Task

Work hours are the units of time used to plan and to complete a Task. You can add your time to your tasks from several areas:

1. With the **Story Editor** open, in the **Tasks** pane at the bottom, double click the button to open the **Record Time** box.
2. With the **Task Editor** open, click the button next to **To Do** to open the **Record Time** box.
3. In **Team Room** > **Sprint Cards**, on a card, click the button to open the **Record Time** box.

4. In the **Team Room** > **Sprint List**, double click the button in the **To Do** column to open the **Record Time** box.

For more information, see *Status and Work Hours*.

About Status and Work Hours

The following information describes how changing work hours on a Task or changing the Task **Status** impact the Story/Task.

- When the first work record is entered, the Task **Status** is changed to `In Progress`.
- The amount of time entered in the **Worked** field is automatically deducted from the **To Do** field.
- When a Task is marked `Complete`, **To Do** goes to 0. Likewise, when you enter `0` in **To Do**, the Task **Status** is set to `Complete`.
- When **Worked** entered is greater than remaining **To Do**, **To Do** goes to 0.

Moving a Story from One Sprint to Another

You can move a Story from one Sprint to another, or even back to the **Backlog** by using the gear menu in the **Sprints** panel of the **Backlog** or in either view of the **Team Room**.

1. Click > **Move...**.
2. Select the Sprint to move the Story to, or select **Backlog**.

Adding Stories from the Backlog

Note: Parent Stories cannot be added to Sprints. Only the lowest level leaf item in your hierarchy can be added to a Sprint as a work item.

1. In the **Team Room**, click **Add Existing** . The **Add Stories from the Backlog** window appears.
2. Select the row or rows for the Stories to add and then click **Add to Sprint**.

Accepting a Story

The option to accept a Story is only available after all Tasks associated with the Story have been completed. When all the Tasks in a Story have been completed, the status of the Story changes to `Completed`.

At the end of the Sprint, the completed Stories are reviewed and accepted by the Product Owner.

1. Open the **Team Room** in either the **Card view** or the **List view**.
2. Click the last box in the **Status** column to **Accept** the Story.

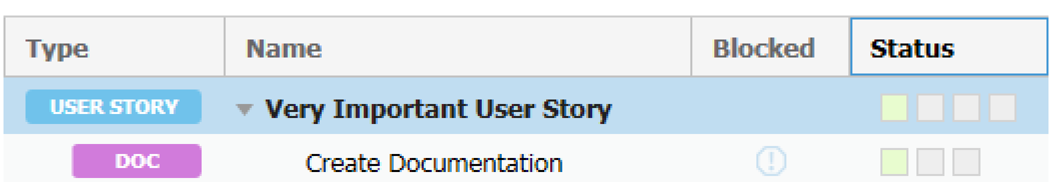
Blocking a Task

Any time an issue outside of the teams control prevents progress, you should *Block* the Task .

Important: When a Task is blocked, the Story is also *Blocked*.

Tip: If you are in the Task Editor, you can click the Blocked icon in the left pane to block a Task.

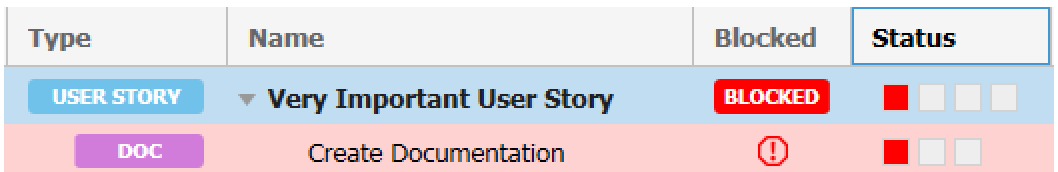
1. In the **Team Room**, make sure that the **Blocked** column is visible. See *Viewing Columns in Grids*.



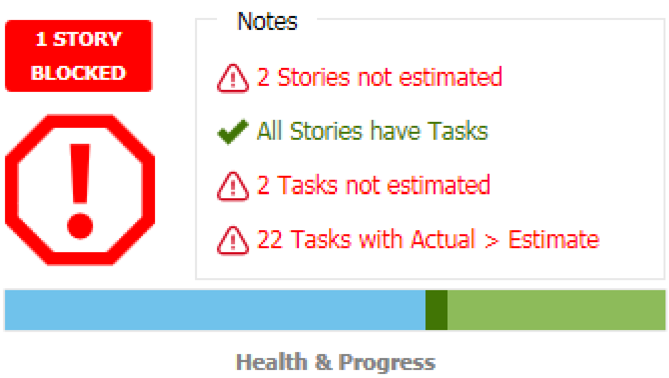
2. Hover over the block icon in the **Blocked** column for the Task you want to block.
3. Click the icon when it enables .
4. Click **Save**.
5. The following happens when a Task is Blocked:

   - The icon in the **Blocked** column changes to .
   - The **Story** row will display BLOCKED.
   - The Task row is highlighted.
   - The boxes in the **Status** column turn red, depending on the Status.

   Here is what it will look like after it is blocked:



The **Health and Progress** pane of the Team Room will also display a blocked Story.



Changing a Sprint's Capacity

You can modify Sprint capacity in the following ways:

1. Click **Planning** > **Timeboxes**, select `Sprints` from the **Type** list and double click the **Capacity** cell in the list and modify the value.
2. Click **Planning** > **Backlog**, open the **Sprints** panel and adjust the value in the **Capacity** field.
3. In the **Team Room**, click **Edit Sprint** and then modify the **Capacity** field.

Carrying Over Incomplete Stories

Sometimes Stories won't get finished during a Sprint. You can carry over any incomplete Story into another Sprint or put it back in the Backlog. Carrying over a Story will copy the Story to the new Sprint and leave the original Story in the original Sprint with a status of `Incomplete`. The remaining Task hours and Story Points will be added to the new Sprint's statistics. Carry over Stories will be indicated with the prefix `[Carried Over]`. When a Story is moved back to the Backlog, the original Story is removed from the Sprint Card.

1. Go to the **Team Room**.
2. Click > **Carry Over** to the left of the Story.
3. Select where the Story should go: to another Sprint, or to the Backlog.

The CARRIED OVER image will display in the **Carried Over** column in grids.

Team Room Columns

Default Columns

The following columns display by default. If you modify them, your changes will be saved. For more information, see *Viewing Columns in Grids*.

Order The Order column represents the numerical position of the item in the list. Double click to enable manually editing the value.

ID Unique ID of the item. Read-only.

Type Type is used as a way to categorize Stories. Available Story Types include: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. For more information, see *Working with Stories*.

Name Item Name. In most cases, you can double click to edit.

Owner Indicates who is responsible for Story.

Status The **Status** column for a Story contains a bubble control that allows you to click on one of the bubbles to set the status of the Story: `Not Started`, `In Progress`, `Not Started`, `Complete`, or `Accepted`.

Points Indicates the number of Story Points it is estimated to take to complete the Story.

Task Est. **Task Estimate** indicates the estimated number of hours it will take to complete the Task. For more information, see *Adding Work Hours to a Task*.

Actual Indicates the actual amount of hours worked on the Task. For more information, see *Adding Work Hours to a Task*.

To Do Indicates the remaining hours left to work on the Task. For more information, see *Adding Work Hours to a Task*.

Blocked Blocked indicates that there is an issue outside of the teams control preventing progress. If a Task is blocked, the parent Story will display BLOCKED in the grid. Click the icon in the grid to block a Task. It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories.

Priority Priority is a list of values that includes the following: `Must Have`, `Should Have`, `Could Have`, or `Won't Have`.

Available Columns

Carried Over This column in the grid will display a special image CARRIED OVER representing that the Story was carried over from one sprint to the next (or more).

Points Indicates the number of Story Points it is estimated to take to complete the Story.

Revision Version number of the item. Read-only.

Last Edited Date that the item was last edited. Ready-only.

Author Name of the original author of the item. Read-only.

Created Date Date that the item was created. Ready-only.

Last Edited By Name of the last author who lasted edited the item. Read-only.

Using Quick Filters

In the Team Room, you can use a quick filter to display only certain information. The quick filter is only a single level filter, it does not apply compound conditions.

1. Click the **Filter** icon in the toolbar.
2. Select how you want to filter the data:

By Owner	Select the owner that you want to filter by.
By Type	Select the Story Type to filter by.
By Status	Select the Status value to filter by.
Stories	Contains several options for Stories in various states or by various owners.
Tasks	Contains the following options to filter Tasks by: `To Do`, `Not Estimated`, and `Actual > Estimate`.

3. After applied, the filter changes: .
4. To clear the filter, click > **Clear**

Tracking

The **Tracking** perspective is a resource for project managers and product owners who want an overview of how the release is progressing. It includes charts to show progress as well as a list of all stories targeted for the current release organized by type. This view includes easily understandable charts for **Progress**, **Health**, **Burnup** and **Breakdown**.

In *Agile* development, a product can be released to a customer after every iteration or after several iterations or Sprints. Atlas Team uses the *Release* functionality to organize Sprints. You must create a *Release* before you can start creating and planning for Sprints.

When you are planning for a Release, the *Target Release* function allows you to add stories to target Stories for a Release during release planning. These stories will be part of the calculations for *Release Tracking*.

Important: To make the best use of this feature, it is important to target Stories in your backlog for release. Only Stories that are targeted for the current Release will be included in the *Release Tracking* calculations.

Release Progress

The summary information at the top of the page provides a snapshot of the current status of the release to allow the team and the product owner to determine if any changes need to be made in order to meet the project deadlines. Information in the summary includes:

- Release start and end dates.
- Remaining Days.
- Remaining Work.
- Operating Capacity.
- Operating Velocity

Note: If a Story is not estimated, it is not included in the release tracking calculations and a warning is displayed in the **Health** section indicating that there are Stories without estimates.

The **Progress** bar indicates the number of story points completed, started, not started, or blocked in a release.

Release Health

The following information is contained in the **Health** section on the Tracking perspective:

Estimated Stories	Lists the number of Stories not estimated or says that all Stories are estimated.
Projected Completion Date	A calculation is performed that is based on the **Operating Velocity**. If it's after the defined Release boundaries, it is red and provides the *remaining days*.
Velocity Suggestion	Displays the weekly velocity required to meet the Release end date
Payload Suggestion	Suggests the necessary changes to meet the Release end date.

Release Burnup

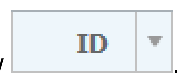
The **Burn Up** chart shows the Stories in the release categorised into their Sprints. The completed and accepted Stories are then shown as bars where the points value of each Sprint adds to the previous. Work completed in the backlog or work done in Sprints where the end date is outside of the release boundaries will be summarised into bars on either end of the graph 'Already Complete' and 'Completed Late'. If the sprints do not fill the release window, expected end dates of the sprints will be shown but with no associated bar.

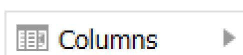
Release Breakdown

The **Release Breakdown** includes all of the stories targeted for the release separated by story type and in hierarchical order.

Viewing Columns in Grids

Each perspective/view contains different grids with relevant information. There are additional columns available.

1. Hover over any column heading until you see an arrow 

.
2. Click the arrow to see 

.
3. Hover over **Columns** and you will see a list of all available columns.
4. Click each column that you want to see in the grid.

Your selections are saved for you when you return to that view.

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