

# Rhythm 4.1

Rhythm Help

**Micro Focus**  
The Lawn  
22-30 Old Bath Road  
Newbury, Berkshire RG14 1QN  
UK  
<http://www.microfocus.com>

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# Rhythm



## Welcome to Rhythm

Rhythm 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:

- [Attachments](#)
- [Bulk Edit in Grids](#)
- [Customizable Swimlanes](#)
- [Discussions](#)
- [Import/Export](#)
- [Input Streams](#)
- [Relationships](#)
- [Tags](#)
- [Versions](#)

Check out the full Release Notes [here](#):



## Featured Sections

- [Getting Started with Rhythm](#)
- [About Stories](#)
- [Administration](#)
- [Planning](#)

[Team Room](#)  
[Tracking](#)

## Online resources

### Online Help

Find your answer by viewing the [full version](#) of the product help on the web.

### Micro Focus Community

Visit our [community](#) for new, articles, and insight from developers and users.

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# Getting Started with Rhythm

Welcome to Rhythm! Rhythm 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 Rhythm 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 Rhythm integrate. See [Using Rhythm with Atlas](#).

## 1. Create a Project

The administrator can use an existing Atlas Project or [create a new Rhythm Project](#).

## 2. Build and break-down the Backlog

The Product Owner needs to decide whether they would like to *push* Requirements into Rhythm from Atlas, or whether they would like to *pull* Requirements (and Defects) into Rhythm from the Atlas Hub, or you could do both.

- Push Requirements from Atlas into Rhythm as Epics. See [Using Rhythm with Atlas](#).
- Pull Requirements (and Defects) into Rhythm from the Atlas Hub. See [Configuring Input Streams](#) and [Input Streams](#).
- [Breakdown Epics into consumable Stories for the project team](#).

## 3. Groom the Backlog for delivery planning

The Product Owner should:

- [Refine and Rank the Backlog](#).
- [Target Stories for a Release](#).

## 4. Plan the Sprint and Release Timeboxes

- 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 Rhythm 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 Rhythm with Atlas

Rhythm 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 Rhythm to plan, status, and track the day-to-day Agile activities of the project team. Atlas pushes Requirements into Rhythm 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 Rhythm, but Projects are *common* between Atlas and Rhythm 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 Rhythm, the administrator needs to set project access rights for each user. See [Setting Project Access Rights](#).

### Starting and Logging In

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

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

### Requirements

You *Push* Requirements from Atlas into Rhythm 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**.

 **Tip:** You can also *Pull* Requirements and Defects into Rhythm using *Input Streams*. Any defect or requirement that was synchronized into the Atlas Hub using Micro Focus Connect is available to be added into Rhythm. For more information, see [Input Streams](#).

Proceed to [Getting Started with Rhythm](#).

## Starting Rhythm

To start Rhythm directly from a browser, type in: `http://<hostname>/atlas/#perspective=agile`.

To start Rhythm from within Atlas:

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



2. Select **Rhythm**. A new browser tab opens the application.

## What's New in Rhythm

### 4.1

The following are the latest features for Rhythm:

#### Attachments

Stories allow you add file attachments, just like Atlas. Refer to the topic titled *Using Attachments with Stories* in the online help.

#### Bulk Edit in Grids

You can now perform bulk edits on multiple rows for any visible column in grids.

#### Customizable Swimlanes

Task **Status** values are now customizable.

**For Administrators** In **Admin Tools**, click the **Task Status/Swimlanes** tab to create new **Status** values and enable the ones you want the team to use.

**Users** **In grids and the Story Editor** The **Status** control will contain the number of **Status** Values that are defined. Just click the Value.

**In the Team Room** When you select a Story in the **Sprint Cards** view, your tasks display in columns based on the Status Values. Simply drag-drop the Task to change the **Status**.

## Discussions

Stories in Rhythm allow you to have Discussion Topics, similar to those in Atlas. Refer to the topic titled *Discussions* in the online help.

## Import/Export

You can now import Stories into or export Stories out of a CSV file.

**Import** Use your favorite CSV editing tool, such as Microsoft Excel, to create Stories and import directly into Rhythm.

**Export** Export selected Stories out of Rhythm and use your tool of choice to consume the data.

## Input Streams

Input Streams enable business and quality teams to work in seamless cadence with the Agile development team. Using Micro Focus Connect, *Input Streams* allow you to pull in external Requirements and Defects into the Rhythm Backlog for you to review and discuss. If you then choose to *Accept* them, new Epics/ Defects are created in Rhythm with clear traceability back to the original external asset. This link provides a mechanism for feedback to the original author.

## Relationships

You can now create direct, traceable relationships from Story to Story. Further, you can view and track the relationship directly back to the Requirement or other related asset in Atlas and monitor and action any changes. Refer to the topic titled *Relationships* in the online help.

## StarTeam Agile Replacement

StarTeam Agile customers should now use Rhythm as their agile tracking tool. If you plan to continue to use StarTeam Agile, you need to open the `ALMConfiguration.xml` file and change this value: `<goToStarTeamAgile>TRUE</goToStarTeamAgile>`. Additionally, refer to the installation guide to learn about enabling the StarTeam Agile .WAR file.

## Tags

You can now *Tag* Stories. This provides the ability to tag similar Stories with relevant labels to group and review the items together. Refer to the topic titled *Using Tags* in the online help.

## Versions

Stories now save versions for every time the Story is changed. You can easily see how the Story changed by comparing the differences. Refer to the topic titled *Viewing and Comparing Versions of a Story* in the online help.

# 4.0

## Rhythm

Rhythm 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.

# Home

The Rhythm **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



Administrators use the System's **Admin Tools** to manage Users and to set Project access rights. See [Administration](#).

## Activity Feed

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

The following roles are available:

**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. 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**.



**Note:** 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. The following roles are available:

- 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. 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 **Rhythm**. 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.

## Configuring Input Streams

Input Streams enable business and quality teams to work in seamless cadence with the Agile development team. Using Micro Focus Connect, *Input Streams* allow you to pull in external Requirements and Defects into the Rhythm Backlog for you to review and discuss. If you then choose to *Accept* them, new Epics/ Defects are created in Rhythm with clear traceability back to the original external asset. This link provides a mechanism for feedback to the original author.

Each Project in Rhythm can contain a single Input Stream for Requirements and a single Input Stream for Defects. After you set up the Input Stream for the Project, you actively **Accept** or **Reject** each item that you want to add to the Backlog.

### Creating a Requirement Input Stream

For Requirements, you need to create a filter in Atlas that contains all of the conditions that you want. When you do this, a query is created in Rhythm that you can set for the project. For example, you could

create an Atlas Filter with the criteria `where Status = Planned`. This query would pull all Requirements that meet the Filter condition.

1. In Atlas, create a Filter that contains all of the criteria that you need. A resulting Query will be created in Rhythm that you can use in this step.
2. Log in with Project Administrator credentials.
3. Click  (Home).
4. Click **Admin Tools**.
5. Click the **Input Streams** tab.
6. Click the **Requirements** check box.
7. Click **Configure**. The **Create Input Stream** dialog box opens.
8. From the **Queries** list, select the query that you want to use.
9. Click **OK**.

Items that match the query criteria will be available for review and discussion in the  **Planning** >  **Breakdown** view.

### Creating a Defect Input Stream

For Defects, an administrator can select any of the pre-existing queries that are defined in the Atlas Hub, or use default queries provided by Rhythm: `All Items`, `All Open`, `All Open and High Severity`, `All Open in the last year`, `Flagged Items`, `Not a Priority`, `Priority`, `Status = Closed`, `Deferred`, `Open`, `Resolved`, `OR Verified`, `Type = Defect OR Suggestion`, `OR Unread Changes`.

To create a Defect Input Stream:

1. Log in with Project Administrator credentials.
2. Click  (Home).
3. Click **Admin Tools**.
4. Click the **Input Streams** tab.
5. Click the **Defect** check box.
6. Click **Configure**. The **Create Input Stream** dialog box opens.
7. From the **Queries** list, select the query that you want to use for Defects.
8. Click **OK**.

Items that match the query criteria will be available for review and discussion in the  **Planning** >  **Breakdown** view.

### Changing Task Status Values (Swimlanes)

Administrators can change the default Task Status Values from `Not Started`, `In Progress`, or `Complete`. You can add any values that your team needs. You must use a minimum of three. These values will be available for each Project on the server, but the ones selected will be available for the current project.

 **Important:** Each Task **Status** Value that is defined will be an individual column in the  **Team Room** >  **Sprint Cards** view, so limiting the Values will help keep that view manageable.

1. Log in with Project Administrator credentials.
2. Click  (Home).
3. Click **Admin Tools**.

4. Click the **Task Status/Swimlanes** tab. The available **Status Values** appear in the list. The ones that are checked are the ones that are being used.
  - a) Click **New Task Status** to add a new **Status Value**.
  - b) Alternatively, you can double click any existing value to edit it.
  - c) Click the corresponding check box to enable that **Status Value**.
  - d) Drag-drop the items to place them in the order you prefer. This order represents how they will display in columns in the **Sprint Cards** view.

The first checked item in the list will be indicated as the *Starting Task Value* while the last will state *Completed Task Value*.

## 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 Rhythm 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 Rhythm **Planning** perspective  enables teams to capture and manage their Backlog, organize and breakdown their Stories, as well as define the time-boxes in which they are incrementally delivered.

# 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**.

For more information, see [About Stories](#).

To create a detailed story:

1. Click **New Story: Detailed**.

2. Enter the details for the Story:

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

For more information, see [About Stories](#).

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:

<b>Name</b>	Enter a descriptive name for the Story.
<b>Owner</b>	Select the resource responsible for the Story.

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

- 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.

- From the **Planning** perspective, select the Story you want to target for a release.
- Click  > **Assign to Release**. The **Assign to Release** dialog box opens.
- 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.

- Click  **Planning** >  **Breakdown**.
- Click  > **Breakdown** to the left of the Story you want to break down. The **Create Story** box opens.
- Select the **Type**.
- Select the **Title**.
- 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](#)

## Input Streams

Input Streams enable business and quality teams to work in seamless cadence with the Agile development team. Using Micro Focus Connect, *Input Streams* allow you to pull in external Requirements and Defects into the Rhythm Backlog for you to review and discuss. If you then choose to *Accept* them, new Epics/ Defects are created in Rhythm with clear traceability back to the original external asset. This link provides a mechanism for feedback to the original author.

Each Project in Rhythm can contain a single Input Stream for Requirements and a single Input Stream for Defects. After you set up the Input Stream for the Project, you actively **Accept** or **Reject** each item that you want to add to the Backlog.

**Requirements** For Requirements, you need to create a filter in Atlas that contains all of the conditions that you want. When you do this, a query is created in Rhythm that you can set for the project. For example, you could create an Atlas Filter with the criteria `Where Status = Planned`. This query would pull all Requirements that meet the Filter condition.

**Defects** For Defects, an administrator can select any of the pre-existing queries that are defined in the Atlas Hub, or use default queries provided by Rhythm: `All Items, All Open, All Open and High Severity, All Open in the last year, Flagged Items, Not a Priority, Priority, Status = Closed, Deferred, Open, Resolved, Or Verified, Type = Defect Or Suggestion, Or Unread Changes`.

Project administrators enable this functionality in **Admin Tools** and can switch the query at any time during the project. After they have been configured, click **Input Streams** on the  **Planning** >  **Breakdown** view to **Accept/Reject** individual items.

### Stream States

Whether an item appears in an Input Stream depends on the Query as well as its internal **Stream State**:

**Pending** The default state for every item. When an item is `Pending` and matches the query, it is listed in a Stream.

**Accepted** The item has been accepted and another artifact (Story) has been created

**Rejected** The item has been rejected. No other artifact has been created from this one. It will not be listed in the Input Streams.

Although you don't modify these directly, you can see the values when you compare versions of the original Input Stream asset on which the Story is based. And, there is a way to move a `Rejected` item back to `Pending`. See *Rejecting an Item* in [Accepting Input Stream Items](#).

### Reviewing Input Stream Items

If your administrator configured Defect or Requirement Input Streams, access them in the  **Planning** >  **Breakdown** view by clicking  **Input Streams** in the menu bar.

The **Input Streams** dialog box open. You can select either **Requirements** or **Defects**. When you do, all items matching the configured query will display in the list.

Your team should review each item and only add those to the Backlog that the team needs.

### Discussing an Item

Before you **Accept** or **Reject** an item, you can click the **ID** column to open the external Defect or Requirement. Along with the item's normal properties, you can see the **Discussion** tab  in the right hand

pane. Use this to review and discuss with your team before you decide on the external items disposition. For more information, see [Discussions](#).

### Accepting Input Stream Items

As soon as you have reviewed and discussed the Defect or Requirement with the team, you will want to Accept the item into your Backlog. Do the following:

1. Open the **Input Streams** dialog box.
2. Select the **Defects** or **Requirements** option.
3. Click the **Gear** icon  for the item.
4. From the list, click **Accept**.

The following happens:

- The external item is removed from the **Input Streams** list.
- A new item (Defect or Requirement) is created in the Rhythm Backlog. This new item is a copy of the original, external item. It contains its relevant properties like Title, Description, etc. However, any Discussion or Versions are not carried over since they apply only to the original external item.
- A Relationship is created from the new item in Rhythm to the external item. You can access the original external item via the **Relationships** tab in the **Story Editor**. Any change in the original, external item will change the Relationship status to *Suspect*.
- If you display the **Input Stream** column in your grids, you will see the  icon. Hover to view the external item or click it to open the external item.

### Rejecting an Item

If you choose to reject an item, click **Reject**, enter a reason in the **Reason for Rejection** dialog box, and a Discussion Topic is created for the external item. The item will no longer be visible in the **Input Streams** dialog box. In Atlas, you will see a Discussion Activity item added to the Home screen.



**Tip:** If you inadvertently rejected an item or stakeholders have further defined your item such that it is now meaningful and should be in the Rhythm Backlog, you can modify that in Atlas. There is a **Reset Input Stream State** button for the Requirement in the **Define** view that will allow you to reset the item state so that it will be visible in the **Input Streams** dialog box again.

## Import/Export

The Import/Export feature allows you to import Stories to and export Stories from the **Breakdown** view of the **Planning** Perspective. This feature supports both .CSV and .TXT files.

The feature allows you to:

- Create Stories in another tool and import them into Rhythm. For example, you may want to create Stories in Microsoft Excel.
- Export Stories into a file and consume that data with another tool.

This functionality is not designed for bulk Story editing since the import process creates new Stories for each row in the file.

### About Import

- The Import feature will create new Stories even if a row ID in the file matches a Story ID in Rhythm.
- Requires a properly formatted .CSV/.TXT file.
- Import will accept many fields as defined in the Atlas Hub, but the heading names need to match exactly, otherwise, they will be ignored. Some common fields include Name, StoryType, MOSCOW, EstimatedPoints, RichDescription, Sponsor, StoryStatus, and StoryValue.

The following represent the required values for list fields:

- Atlas Hub StoryType = Rhythm Type and must be one of these values: User Story, Technical To Do, Epic, Theme, and Defect. For more information about Types, see [Working with Stories](#).
- Atlas Hub MOSCOW = Rhythm Priority and must be one of these values: Must Have, Should Have, Could Have, or Won't Have.
- Atlas Hub StoryStatus = Rhythm Status and must one of these values: Not Started, In Progress, Not Started, Complete, or Accepted.
- Atlas Hub StoryValue = Rhythm Value and must be Low, Medium, or High.
- Atlas Hub Sponsor = Rhythm Owner and needs to be an existing User in Rhythm, otherwise it will be ignored.



**Tip:** Perform an export first, and use that file as your import file template.

- StoryOrder for the **Breakdown** view and Rank for the **Backlog** can be used.
- Additionally, the following fields can be used to create parent-child relationships: ID and ParentID.
- The Name field is the only required field.

### About Export

- Export will adhere to any filter that is applied to the **Breakdown** view.
- Export will create a file with Story data for the following fields: ID, ParentID, StoryType, MoSCoW, EstimatedPoints, StoryOrder, RichDescription, Sponsor, Blocked, Carried Over, CreatedTime, CreatedUserID, DotNotation, ModifiedTime, ModifiedUserID, Plan, Rank, Risk, Sprint, StoryStatus, and StoryValue.

### Importing Stories

It is important to understand the requirements before importing a file. See [Import/Export](#).

1. Open the proper Project.
2. Click  **Planning** >  **Breakdown**.
3. Click  **Import**.
4. Click **Select** on the **Import Stories** dialog box.
5. Select a .CSV/.TXT file and click **Open**.
6. Click **Import**.

### Exporting Stories

1. Open the proper Project.
2. Click  **Planning** >  **Breakdown**.
3. Apply any filters that you would like.
4. Click  **Export**.
5. Depending on your browser, the file will be downloaded or you will be asked how you want to save the file.

## 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.

<b>Name</b>	Item Name. In most cases, you can double click to edit.
<b>Type</b>	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 <a href="#">Working with Stories</a> .
<b>Priority</b>	Priority is a list of values that includes the following: Must Have, Should Have, Could Have, or Won't Have.
<b>Tag</b>	The <b>Tag</b> column allows you select multiple pre-defined Tags for your Story. This is useful for filtering and organizing your Stories. Double-click the <b>Tag</b> cell for the proper row and select the Tags from the list to apply. For more information, see <a href="#">Using Tags</a> .   <b>Note:</b> This column displays by default for new Users and Projects. For others, you need to explicitly show the column. See <a href="#">Viewing Columns in Grids</a>
<b>Points</b>	Indicates the number of Story Points it is estimated to take to complete the Story.
<b>Owner</b>	Indicates who is responsible for Story.
<b>Input Stream</b>	This column displays the <b>Input Stream</b> icon  if the item was derived from an Input Stream. Hover over the item for more information or click the column to open the external item. For more information, see <a href="#">Input Streams</a> .
<b>Status</b>	The <b>Status</b> 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.  The <b>Status</b> column for a Task also contains a bubble control that allows you to set the Status by clicking on one of the bubbles. The number of bubbles depends on the amount of Task Status Values configured by your administrator. See <a href="#">Change Task Status Values (Swimlanes)</a> .
<b>Release</b>	Currently assigned Release for the Sprint. Double click to enable the list for choosing a new one.
<b>Sprint</b>	The name of the current Sprint. Double-click to view a list of available Sprints. Select a new one if desired.

### Available Columns

Other columns include:

<b>Blocked</b>	Blocked indicates that there is an issue outside of the teams control preventing progress. If a Task is blocked, the parent Story will display <b>BLOCKED</b> in the grid. Click the  icon in the grid to block a Task. After entering a comment, It will change to  . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories. For more information, see <a href="#">Blocking a Task</a> .
<b>Carried Over</b>	This column in the grid will display a special image <b>CARRIED OVER</b> representing that the Story was carried over from one sprint to the next (or more).
<b>Revision</b>	Version number of the item. Read-only.
<b>Last Edited</b>	Date that the item was last edited. Ready-only.
<b>Author</b>	Name of the original author of the item. Read-only.
<b>Created Date</b>	Date that the item was created. Ready-only.
<b>Last Edited By</b>	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** > .
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.

**Tag** The **Tag** column allows you select multiple pre-defined Tags for your Story. This is useful for filtering and organizing your Stories. Double-click the **Tag** cell for the proper row and select the Tags from the list to apply. For more information, see [Using Tags](#).

 **Note:** This column displays by default for new Users and Projects. For others, you need to explicitly show the column. See [Viewing Columns in Grids](#)

**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.

The **Status** column for a Task also contains a bubble control that allows you to set the Status by clicking on one of the bubbles. The number of bubbles depends on the amount of Task Status Values configured by your administrator. See [Change Task Status Values \(Swimlanes\)](#).

**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. After entering a comment, It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories. For more information, see [Blocking a Task](#).
- 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.
- 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](#).
- Tag** The **Tag** column allows you select multiple pre-defined Tags for your Story. This is useful for filtering and organizing your Stories. Double-click the **Tag** cell for the proper row and select the Tags from the list to apply. For more information, see [Using Tags](#).
-  **Note:** This column displays by default for new Users and Projects. For others, you need to explicitly show the column. See [Viewing Columns in Grids](#)
- 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 **BLOCKED** in the grid. Click the  icon in the grid to block a Task. After entering a comment, It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories. For more information, see [Blocking a Task](#).

**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).

**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.

The **Status** column for a Task also contains a bubble control that allows you to set the Status by clicking on one of the bubbles. The number of bubbles depends on the amount of Task Status Values configured by your administrator. See [Change Task Status Values \(Swimlanes\)](#).

**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 Grid

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

The **Sprints** grid 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](#).

<b>ID</b>	Unique ID of the item. Read-only.
<b>Name</b>	Item Name. In most cases, you can double click to edit.
<b>Start Date</b>	Planned Start Date of the Sprint.
<b>End Date</b>	Planned End Date of the Sprint.
<b>Stories</b>	Total number of Stories in the Sprint.
<b>Assigned</b>	This value is the total number of Story points of all Stories assigned to the Sprint.
<b>Delivered</b>	This value is the total number of Story points of all Stories that are in the <code>Accepted</code> or <code>Complete</code> states.
<b>Capacity</b>	The number of Story points that you expect to be able to complete in a Sprint.
<b>Release</b>	Currently assigned Release for the Sprint. Double click to enable the list for choosing a new one.
<b>Author</b>	Name of the original author of the item. Read-only.
<b>Created Date</b>	Date that the item was created. Ready-only.
<b>Last Edited</b>	Date that the item was last edited. Ready-only.
<b>Last Edited By</b>	Name of the last author who last edited the item. Read-only.
<b>Revision</b>	Version number of the item. Read-only.

## Releases Grid

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

The Releases grid 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 Grid

The following columns are available for viewing in the grid on this page. Show/hide columns: [Viewing Columns in Grids](#).

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

## Bulk Editing in a Grid

You can perform bulk edits on multiple rows for any visible column in the grid by:

1. Click the check box in the far left column to toggle selection of a row. Or, click the body of any row and that row will be selected (and others de-selected).
2. **Ctrl+click** to select another row (or click another check box).
3. Double-click any cell in the row and change the value.
4. Click **Save**.

# 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.

## About Stories

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

Rhythm provides many ways for you to create, to edit, and to manage your Stories:

 [Breakdown View](#) |  [Backlog View](#) |  [Team Room](#)

### Extensions Pane

After you create and save your Story, you can use the expandable right-hand pane to do the following with Stories:

 **Discussions** Create a Discussion to share with the team. See [Discussions](#).

 **Attachments** Add files to your Story. See [Using Attachments with Stories](#).

 **Relationships** Create relationships to or from your Story to other assets. See [Relationships](#).

 **Tags** Create Tags to label similar Stories. See [Using Tags](#).

 **Versions** Review every change made to your Story. Compare as needed. See [Viewing and Comparing Versions of a Story](#).

### Story Types

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

# 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**.

For more information, see [About Stories](#).

To create a detailed story:

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

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

For more information, see [About Stories](#).

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:

<b>Name</b>	Enter a descriptive name for the Story.
<b>Owner</b>	Select the resource responsible for the Story.

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

3. To add Tasks to the Story, see [Adding Tasks to a Story](#).

## Working with Tasks

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*.

A Task can be in the default **Status** value of Not Started, In Progress, or Complete. However, the available Task **Status** values can be customized to suit your organization's needs. For more information, see [Changing Task Status Values \(Swimlanes\)](#).

 **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 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).

## Creating a Detailed Task

To create a detailed Task:

1. Open a Story.
2. Click **Detailed Task**. The **Task Editor** appears.
3. Enter the details for the Task:

<b>Name</b>	Enter a descriptive name for the Task.
<b>Owner</b>	Select who will performing the Task.
<b>Type</b>	Select the type of Task it is: Development, QA, or Documentation.
<b>Estimate</b>	Enter the estimate of the number of work hours required to complete the Task.
<b>Status</b>	Click one of the Status boxes: Not Started, In Progress, or Complete. These are the system default values. Your administrator can change these values. See <a href="#">Change Task Status Values (Swimlanes)</a> .
<b>Blocked</b>	Click  to block the Task. For more information, see <a href="#">Blocking a Task</a> .
<b>Actual</b>	Displays the actual number of hours that have been worked on the Task.
<b>To Do</b>	Displays the number of remaining hours to complete the Task. See <a href="#">Adding Work Hours to a Task</a> .

**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.

4. Click **Save**.

## Creating a Quick Task

To create a quick Task:

1. Open a Story.
2. Click **New Task: Quick**. The **Create Task** dialog box appears.
3. Select the **Type**.
4. Type in the **Name**.
5. Click **Save & Close** or **Save & New**.

## 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. Open an existing Story in the **Story Editor** and click **Copy From** .



**Tip:** Alternatively, in the **Backlog** or **Team Room**, select a Story and then 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.

## 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](#).

Type	Name	Blocked	Status
USER STORY	Very Important User Story		<span style="color: green;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span>
DOC	Create Documentation		<span style="color: green;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span>

2. Hover over the Block icon  in the **Blocked** column for the Task you want to block.

3. Click the icon when it enables . The **Provide Blocking Reason** dialog box opens.

4. Enter a reason in the field and click **OK**. This automatically creates a Discussion Topic in the Story and notifies the Story Owner, all team members with Tasks in the Story, and anyone else called out with the @ functionality. For more information, see [Discussions](#).

5. The following also happens when a Task is Blocked:

- The **Title** is modified to include the text *Story 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.
- When you hover over the Blocked icon, the Task that is blocking the Story will display.

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

Type	Name	Blocked	Status
USER STORY	Very Important User Story	<b>BLOCKED</b>	<span style="color: red;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span>
DOC	Create Documentation		<span style="color: red;">■</span> <span style="color: gray;">■</span> <span style="color: gray;">■</span>

6. When you unblock the Task, a reply is added to the original Discussion Topic, also informing team members.

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

**1 STORY  
BLOCKED**

Notes

-  2 Stories not estimated
-  All Stories have Tasks
-  2 Tasks not estimated
-  22 Tasks with Actual > Estimate



**Health & Progress**

## Ordering Tasks

When you create a Task, it is added to the top of the list in the Story. To change the order:

1. Click  **Team Room** >  **Sprint List**.
2. Make sure the **Order** column is visible. See [Viewing Columns in Grids](#).
3. Double-click the **Order** column in the row for the Task to enable editing.
4. Enter the new numerical position (integer) by typing it in or use the control to increase/decrease the position.
5. Click **Enter** and then **Save** (at the bottom).

## 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**.

## Viewing and Comparing Versions of a Story

Every time a Story is modified, a new version is created. You can use the **Story Editor** to review and to compare two versions of a Story.

1. Open the **Story Editor**.
2. Click the **Versions** tab  in the right pane.
3. Select a version and then `ctrl+click` another version and then click  **Compare**. The **Compare Versions** dialog box opens with columns detailing each version of the Story. The fields that you can compare are grouped by various types (**System**, **Description**, **Attachments**, **Extended Attributes**, etc) and displayed in a tree.
4. Click **Options** > **Only show differences** to hide all items that haven't changed.
5. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

## Using Attachments with Stories

You can add attachments to your Story to include as related content. Users can upload and download attachments as needed. As long as users have rights, they can also delete an attachment. There is no limit as to the size of the attachment, however, the larger the attachment, the longer the upload/download time. There is a limit of 1024 attachments per Story.

1. Open the **Story Editor**.
2. Click the **Attachment** tab  in the right pane.

3. To add an attachment:
  - a) Click  **Attach File**. The **Attach Files** dialog box opens.
  - b) Select one or more files to attach.
  - c) Click **Add**.
4. To open an attachment:
  - a) Hover over the row of the attachment.
  - b) Click **Download**  to the far right.
5. To delete an attachment:
  - a) Hover over the row of the attachment.
  - b) Click **Delete** .
6. To sort files:
  - a) Click **Sort** .
  - b) Select how you want the attachments sorted: `Time Added`, `Filename`, or `User`.

## Using Tags in the Story Editor

In Rhythm, a *Tag* is a label that you define and then apply to Stories. What you need to know about Tags:

- They can be Project-specific or Server-specific:
  - A **Server Tag** is available to all Projects on the server.
  - A **Project Tag** is only available for the current Project.
- They can be nested up to one level deep.
- They can contain spaces, numbers, and special characters.
- They can be applied in grids by double clicking the cell in the **Tag** column to display the Tag list.

To manage tags, click the **Tags** tab  in the right pane of the **Story Editor**. There are two panels:

<b>Assigned Tags</b>	Contains any Tags already assigned to the Story.
<b>Available Tags</b>	Contains all available <b>Project</b> and <b>Server</b> Tags, in a tree.

### To Create a Tag

1. Click  **New Tag**.
2. Enter the **Name**.
3. If the Tag is to be available for all Projects on the server, click **Server Tag**.
4. Click **Save**.

### To Create a Nested Tag

1. Select a Tag.
2. Click the **Gear** menu  on the right.
3. Select **Add Child Tag...**
4. Enter the **Name**.
5. Click **Save**.

### To Remove a Tag from a Story

1. Select a Tag in the **Assigned Tags** list.
2. Click the **Remove** icon .

## To Delete a Tag

1. Select a Tag in the **Available Tags** list.
2. Click  **Delete**.

## Discussions

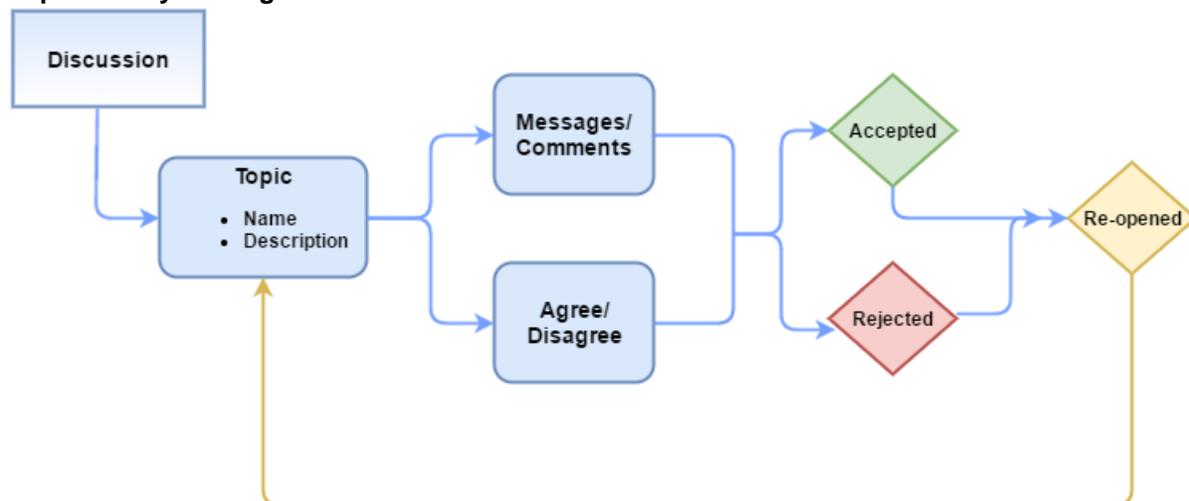
Discussions allow you to share ideas and have in-depth conversations using *Topics*. These Topics allow team members to provide feedback via **Agree/Disagree** icons as well as responding directly to the Topic via messages. When the all of the team's feedback is provided, the Topic can be **Accepted** or **Rejected**. Until then, it is in the *Open* state.

Discussions are available for each Story and for each Sprint. Click the  icon to access them. For Stories, it's a tab in the right pane. For the Sprint, it's an icon in the top right of the **Team Room**.

 **Note:** The highlighted number next to the Discussion icon represents the number of Open Topics in the Discussion.

- A Discussion can contain multiple Topics.
- A Topic contains feedback in the form of:
  - Textual messages via **Reply** .
  - **Agree/Disagree** ( and ) click responses.
- A Topic is in the *Open* state until you **Close** it via **Accept** or **Reject**. You could re-open it later.
- When replying to a Topic, if you want to notify someone, use the @ symbol and select a user from the list provided. Note the following:
  - The @ symbol can be used multiple times to address a message to multiple users.
  - The @ symbol causes emails to be sent to all listed users (if email integration has been enabled in the Atlas Hub).
  - A reply will message the user that started the topic, all of the users that have posted a reply to the topic, and any users mentioned in the new reply.
- When you Block a Task, you are prompted with the **Provide Blocking Reason** dialog box. When you enter the reason and click **OK**, a new Discussion Topic is added to the Story and all team members with Tasks in the Story are notified. When you unblock a Task and provide a reason, likewise, all team members receive a reply.

### Topic Life Cycle Diagram



## 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.

## 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 Story will appear first in the list and the  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](#).

<b>Order</b>	The <b>Order</b> column represents the numerical position of the item in the list. Double click to enable manually editing the value.
<b>ID</b>	Unique ID of the item. Read-only.
<b>Type</b>	Type is used as a way to categorize Stories. Available Story Types include: <code>User Story</code> , <code>Technical To Do</code> , <code>Epic</code> , <code>Theme</code> , and <code>Defect</code> . For more information, see <a href="#">Working with Stories</a> .
<b>Name</b>	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.
- The **Status** column for a Task also contains a bubble control that allows you to set the Status by clicking on one of the bubbles. The number of bubbles depends on the amount of Task Status Values configured by your administrator. See [Change Task Status Values \(Swimlanes\)](#).
- Points** Indicates the number of Story Points it is estimated to take to complete the Story.
- Tag** The **Tag** column allows you select multiple pre-defined Tags for your Story. This is useful for filtering and organizing your Stories. Double-click the **Tag** cell for the proper row and select the Tags from the list to apply. For more information, see [Using Tags](#).
-  **Note:** This column displays by default for new Users and Projects. For others, you need to explicitly show the column. See [Viewing Columns in Grids](#)
- 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  in the grid. Click the  icon in the grid to block a Task. After entering a comment, It will change to . Additionally, the Sprint Health & Progress area in the team Room will indicate that there are blocked Stories. For more information, see [Blocking a Task](#).
- 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  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.
- Input Stream** This column displays the **Input Stream** icon  if the item was derived from an Input Stream. Hover over the item for more information or click the column to open the external item. For more information, see [Input Streams](#).
- 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 last 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. Rhythm 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:

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

## Relationships

Rhythm uses Relationships to help you understand how different items are connected. Changing an object has implications on other elements in the Project. For example, a Requirement change from within Atlas Hub might change the scope or complexity of the Story. Relationships are supported to allow you to see the connection between Stories and related assets. Linking related objects together helps to ensure that changes are implemented correctly at all levels.

You can create relationships manually in Rhythm through the **Relationships** tab in the **Story Editor**.

Rhythm also creates some Relationships automatically for you. Whenever you push Requirements to the Rhythm Backlog from Atlas, a Relationship between the Requirement and the Story is created. When you pull in Requirements or Defects using Input Streams, a relationship is automatically created.

### Relationship Status

There are several types of Relationships and these types can have various statuses. When a change is made to an item with a Relationship, the relationship status changes to **Suspect**. You can view the change and update the status to bring it up-to-date, or you can **Defer** the update. If you defer, the status of the Relationship changes to **Defer**.



**Important:** For all Relationships, except for synchronizations, changing the status does not change the items. The status acts as a label to help you find what you've reviewed and what you need to review. For example, updating the status changes the status to **up-to-date** but does not make any changes to the target item details.

## Creating a Relationship

1. Open the **Story Editor**.
2. Click the **Relationship** tab . The **Relationship** pane appears.
3. Click  **New Relationship**.
4. Select the Project from the **Project** list.

5. Select one or more items with which to create a relationship.

If you can't find the item(s), use the **Find** field.

If you want to create a relationship to a new Story, click **New Story**.

6. Click **Add**. The **Relationship Type & Direction** dialog box opens.

7. Select **Basic Relationship**.

8. Click **OK**.

## 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:

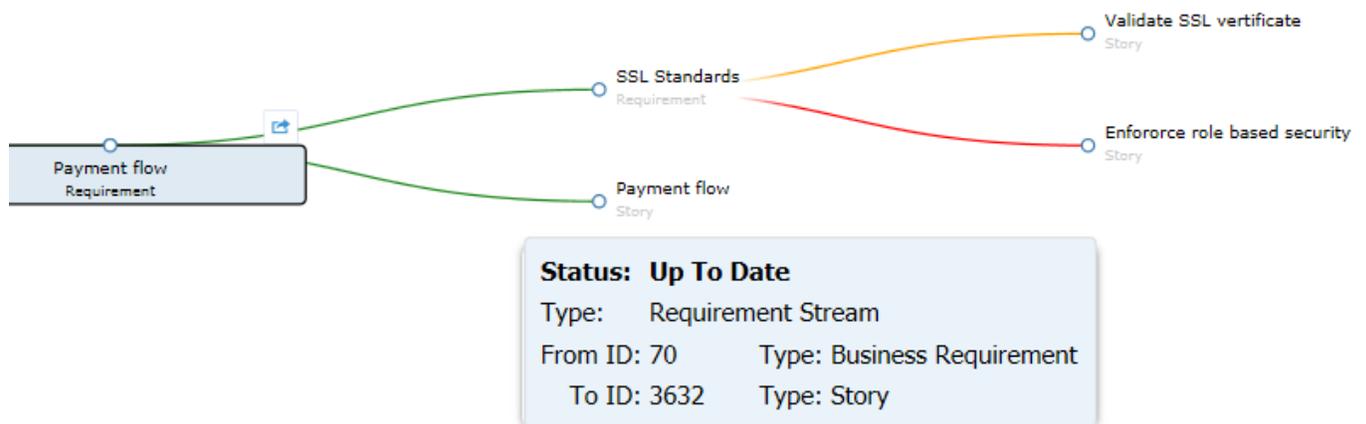
- Item to the left of the requirement link **to** the requirement. Items to the right of the selected requirement link **from** the requirement.
- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship 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.
- Select a **Relationship Type** or a **Relationship Status** to filter the diagram based on your selections.

Relationship Diagrams have indicators to help determine relationship and status at a glance:

- Green lines indicate an **Up-to-Date** relationship.
- Red lines indicate a **Suspect** relationship.
- Yellow lines indicate a **Deferred** relationship.
- Gray and dashed lines indicate a relationship with an external project (cross-project).

Additionally, if you hover over the connecting lines, status and details appear.

### Relationship Diagram Example



# Viewing Status and Details of Relationship Items

You can view the status or detail of an item with a Relationship. Rhythm items display status of Requirement 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.

1. Click 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** list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** list to group relationships.

**Table 1: Relationship Items**

Icon	Type	Details
	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.

# Updating Relationship Status

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

 **Note:** Select the status from the **Relationship Status** list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** list to group relationships.

4. Click ... and choose to **Update** or **Defer** suspect relationships.

## Status Actions

**Deferred** When a relationship is in this status, the available actions are `Compare`, `Update` and `Remove Relationship`.

**Suspect** When a relationship is in this status, the available actions are `Compare`, `Update`, `Defer` and `Remove Relationship`.

# 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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