MICRO FOCUS

Rhythm 4.2

Rhythm Help

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2017-04-25

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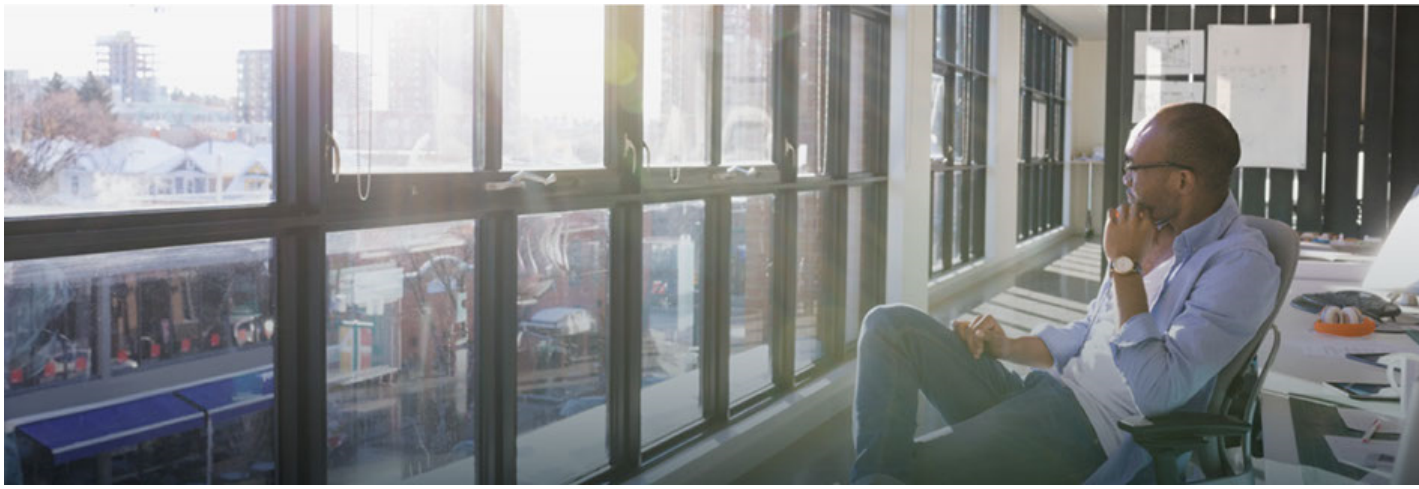
Rhythm



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:

Web-Based Training
User Capacity Planning
Quick Find
Search
Change Package Support
Accessing Stories in Native SCM Environments
Relationship Impact Management
Team Room Cumulative Flow
Release Cumulative Flow
Team Room Burndown Chart
Sprint Activity Window
Decorators for Story Tabs
Team Room Points By Type
Team Room Health & Progress Area

Check out the full Release Notes *here:*

Team Room Filter
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Project Quick Switch

Featured Sections

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About Stories
Administration
Planning
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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.

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.

Provide Feedback

Email us feedback regarding this Help

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**
   a) The administrator can use an existing Atlas Project or *create a new Rhythm Project*.
   b) The administrator needs to set Project access rights for Users. See *Setting Project Access Rights*.
   c) If you want to customize Task **Status Values** beyond the default values (`Pending`, `In Progress`, `Finished`) so that the **Team Room Sprint Card's** view Swim lanes reflect this, see *Changing Task Status Values*.
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. Alternatively, you can enter the Stories manually.

a) Push Requirements from Atlas into Rhythm as Epics. See *Using Rhythm with Atlas*.
b) Pull Requirements (and Defects) into Rhythm from the Atlas Hub. See *Configuring Input Streams* and *Input Streams*.
c) *Breakdown Epics into consumable Stories for the project team*.

3. **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* (in Story Points).
   b) For Sprints, the Scrum Master needs to:
      - *Create a Sprint from the Backlog*.
      - *Set the Sprint's Capacity* (in Story Points).
      - Ensure that all team members individually enter their availability for the Project/Sprint. See *Managing User Capacity*.
4. **Groom the Backlog for delivery planning**
   The Product Owner should:
   a) *Refine and Rank the Backlog*.
   b) *Target Stories for a Release*.
5. **Sprint Planning**
   a) The product team should conduct a planning meeting in order to *estimate Stories*.
   b) After the Stories are estimated, the team and Scrum Master need to *Add Stories to the Sprint* from the **Planning** > **Backlog** > **Sprints Panel**, keeping in mind the indicators provided in the **Health & Progress** area. If you are over capacity, it will tell you. It also indicates if Tasks/Stories are/are not estimated and have owners.
   c) The team members *create Tasks* for their Stories.
      - Estimate the effort for each Task.
      - Assign an Owner to each Task. See *Assigning and Estimating Tasks*.

      Tip: It is likely that many of your Stories will contain the same types of Tasks. If so, we recommend setting up a template Story with all Tasks and using that on which to base each new Story. See *Copying Tasks from Other Stories*.
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 **Sprint List** and **Sprint Cards** to do the following:
   - The Scrum Master runs the daily stand ups, checking on the Sprint health. Use a Quick Filter to filter what data you want to see in the **Team Room**. Note that the graphs in the **Team Overview** change based on the filter.
   - The project team members *add work hours to Tasks* and Status them as needed.
   - As Stories are completed, the Product Owner uses the Team Room to review and *Accept* them.
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

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, 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*.

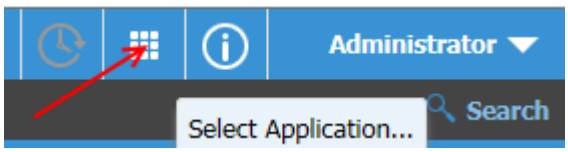
Proceed to *Getting Started with Rhythm*.

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

4.2

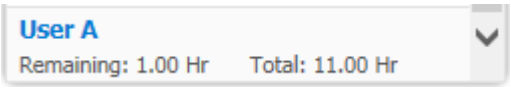
The following are the latest features for Rhythm:

Web-Based Training

Use the following link to order the new, free Rhythm web-based training. Order it *here*!

User Capacity Planning

This release introduces user capacity planning:

Individual User Capacity	Each user can now customize their availability at both the Project level and the Sprint level. You can see these values reflected for each user by using a Quick Filter for a user in the **Team Room** and also in the Task **Owner** field.
Administrator Manages Availability	Although individual users can modify their own availability (see above), each administrator can open the **Edit Sprint** window and use the **Team Availability** grid to change the availability for each user for the *current* Sprint and Project.  **Note:** This applies to *Private* Projects only.
Task Owner Assignment	To aid in deciding who is available to work on a certain Task, the **Team Room** and **Story Editor** now display all users availability when you attempt to assign a user to a Task that is in a Sprint.  This indicates if a team member is over- or under-allocated for the Sprint.

Quick Find

When you are in the **Breakdown** and **Backlog** views of the **Planning** perspective, you can use the **Quick Filter**'s text field to search for text in the current view. This capability is invaluable for quickly finding items in the **Backlog**:

1. Place cursor in the **Quick Filter**'s text field.
2. Type in the text to search for.
3. Click `Enter`.

This will behave exactly as if you opened the **Filter** dialog box and created a filter using `Name Contains <Text>` or `ID Equals <Text>` (the second part is only if the text is numeric).

Search

Rhythm now provides search capabilities for Stories. Using the search, users can easily scan all Stories and their attributes, including the content of attached files. Used together with the Quick Find and Filtering, all data is quickly at your finger tips.

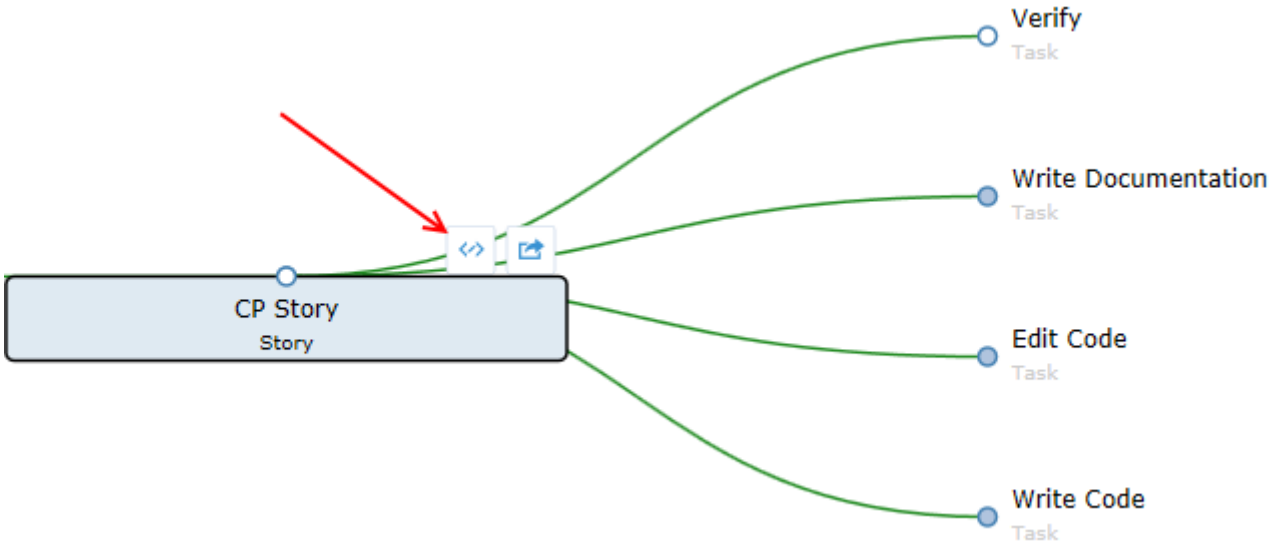
Change Package Support

Rhythm now provides visibility to change sets/packages and their contents directly from the Rhythm user interface. When your native SCM environment is connected to the Atlas Hub, Rhythm includes change sets/packages in the relationship diagram and Story/Tasks lists. Understanding related files and impacts provides users greater understanding of work context.

These Stories display the Change Packages in the **Team Room** via the **Impact** column.

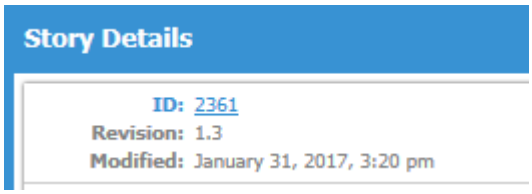
Additionally, any Change Packages associated with a Task are visible in the **Story Editor**.

When viewing relationships in a Story, Change Packages display in the diagram and you can click them to open the **Change Packages Viewer**.



Accessing Stories in Native SCM Environments

Rhythm provides direct Story and Task links to the StarTeam Cross-Platform Client when Atlas Hub file activity is detected. Task links can be used to establish StarTeam Cross-Platform Client work context for developer activity, for example, check-ins. Check-in's in task context automatically create related changes packages that are in turn visible in Rhythm. Just click the **ID** field in the **Story Editor**.



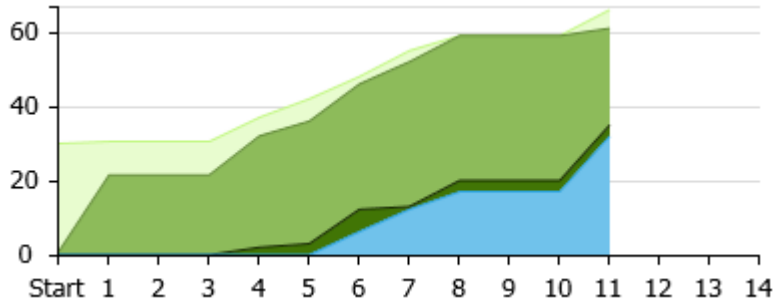
Relationship Impact Management

Rhythm now provides more ways to understand related work and the impact of change. Using the relationship diagram, users view related items and can filter on item type, relationship type, or relationship status. This aids in quickly understanding how data is related and how change propagates through related items.

Team Room Cumulative Flow

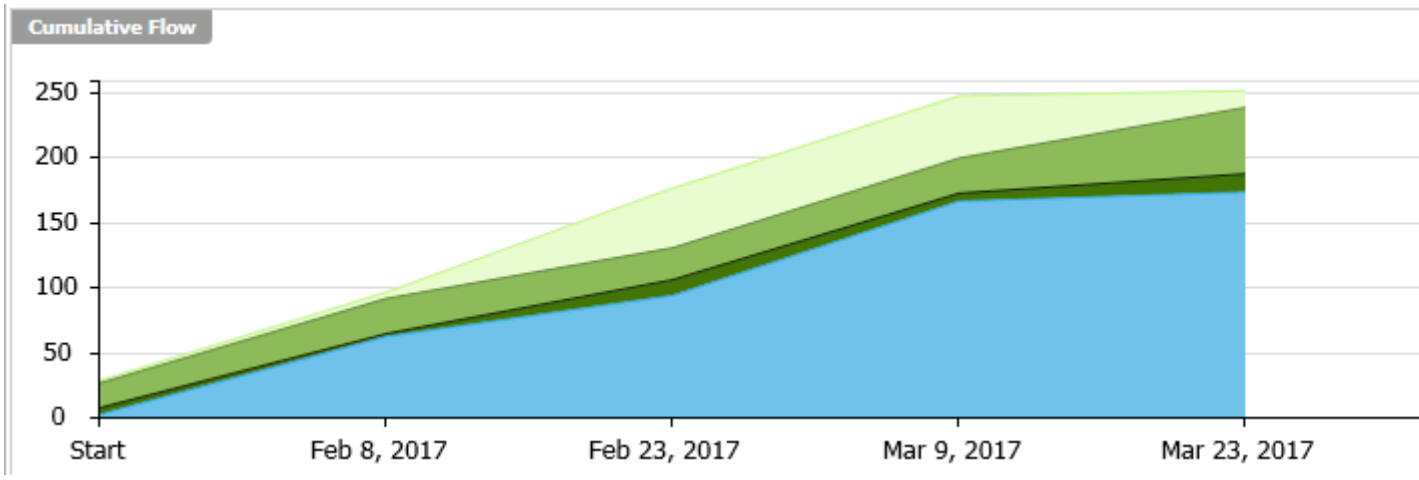
The **Team Room Cumulative Flow** chart represents the amount of work in the Sprint in different states for each day of the Sprint. The vertical axis represents the points in the Sprint. The horizontal axis represents each day of the sprint. It includes **Points Not Started** (light green), **Points In Progress** (green), **Points Completed** (dark green), and **Points Accepted** (blue). The height of the chart defines the scope. If something is added or the estimate is increased, then the whole chart gets taller. If something is removed or the estimate decreased, then the chart gets smaller. It provides the ability to see changes in scope in the sprint.

Additionally, when a Quick Filter is applied, the chart adjusts to the items selected in the Filter.



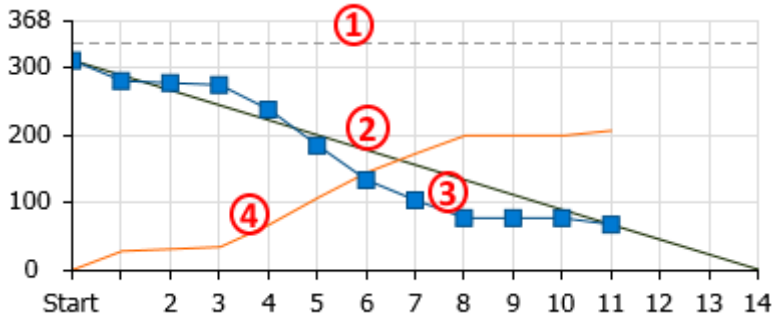
Tracking Cumulative Flow

The **Tracking Cumulative Flow** chart represents the amount of work in the Release in different states for each Sprint of the Release. The vertical axis represents the points in the Sprint. The horizontal axis represents each Sprint of the Release. It includes **Points Not Started** (light green), **Points In Progress** (green), **Points Completed** (dark green), and **Points Accepted** (blue). The height of the chart defines the scope. If something is added or the estimate is increased, then the whole chart gets taller. If something is removed or the estimate decreased, then the chart gets smaller. It provides the ability to see changes in scope in the Release.



Team Room Burndown Chart

The **Team Room Burndown** chart now displays (1) Capacity (2) ideal Burndown (3) current Burndown and (4) Burnup. Additionally, when a Quick Filter is applied, the chart adjusts to the items selected in the Filter.



Sprint Activity Window

The **Sprint Activity** window is available in the **Team Room** and provides activity that occurs on all Tasks, Stories, Discussions for all users. You can filter Tasks by **Date** (From, To), **Type**, **User** and many more (see below). You can use this information to:

- Provide detailed support or explanation for data in the **Team Room** Charts (status changes, work record hours, etc).
- Filter by **Type** to see what was `Added/Created` or `Removed/Deleted` and by whom. You can also isolate Tasks by: `Edited`, `Worked`, `Discussed`, `Carry Over`, `Blocked/Unblocked`.
- Use the data however you need to as the basis for your daily stand-ups or Sprint retrospective.

From the top-right of the **Team Room**, click the **Sprint Activity** button: .

Decorators for Story Tabs

In the **Story Editor**, the tabs for **Discussions** , **Attachments** , **Relationships** , and **Tags** will now show orange decorators when items exist.

Team Room Points By Type

The **Team Room Points By Type** chart is now clickable and will apply a filter with the items selected. Use this bias chart to quickly understand the allocation distribution for Epic, Themes, Stories, Defects, and Tech Todo's. Additionally, when a Quick Filter is applied, the chart adjusts to the items selected in the Filter.

Team Room Health Auto-Filters

The **Team Room Health & Progress** chart is now enabled with clickable auto filters. When warning labels are clicked, for example `1 Story without Tasks`, the full **Team Room** is automatically filtered to show only those items matching the criteria. Locating health and progress issues has never been easier.

Filter Sensitive Team Room Charts

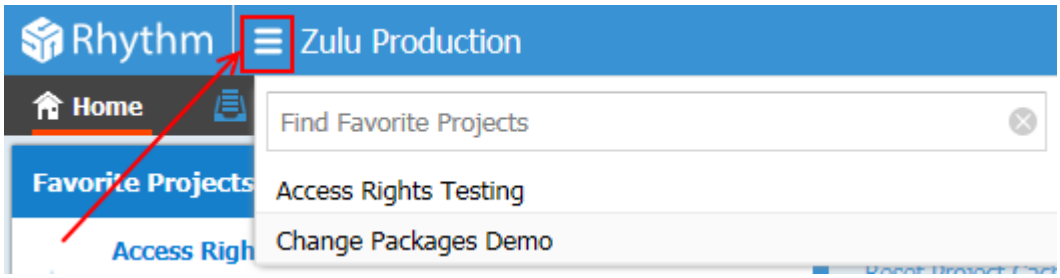
Team room filtering has been updated to apply to not only the grids, but also to all visible charts and health. As selection filters are applied/removed, **Team Room** charts and health are updated to reflected the target data. The available filtered **Team Room** charts enable you to quickly identify trends and problem areas. Click the clear icon ( ) to clear any filter.

Copy Tasks Preview Window

The new **Import Task** preview capability enables you to quickly identify which Story to copy Tasks from. It provides a one-click action to provide visibility to selected Story Tasks before electing to copy them. This lets you accurately copy predefined Tasks from existing Stories and templates.

Project Quick Switch

You can now use the **Switch Project** menu (available in all perspectives) to quickly change from the current Project to any of your *Favorite* Projects.



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 **Breakdown** view 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 view 	The **Activity** view displays in the **Home** perspective. You can see all recent Story activity. See *Using the Activity view*.

Using the Activity View

The primary use for the **Activity** view 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** view. Click  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** view, 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**.

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.
- Reset permissions for the Project.
- Make the Project public.

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**.
7. To make the Project a *Favorite*, click the **Star** button. When a Project is a *Favorite*, it appears in the **Favorite Projects** list in the Home perspective and is also available in the **Switch Projects** list .

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**.
5. To modify the Project visibility (Public or Restricted), see *Setting Project Access Rights*.
6. To make the Project a *Favorite*, click the **Star** button. When a Project is a *Favorite*, it appears in the **Favorite Projects** list in the Home perspective and is also available in the **Switch Projects** list .

Switching Projects

Whenever you mark a Project as a *Favorite*, you can easily switch to that Project from any perspective.

1. In the top left of the application, click the **Projects** icon to the left of the Project name. The list of your *Favorite* Projects displays.
2. Select the Project to switch to. The active Project changes.

Administration

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

Setting Project Access Rights

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. Click **Admin Tools**.
4. Enter the user **Privileges**:

   Check the **Server Administrator** check box to make the user a *Server Administrator*.
5. Enter the user **Login Status**:

   Check **Suspended** to lock the user out.

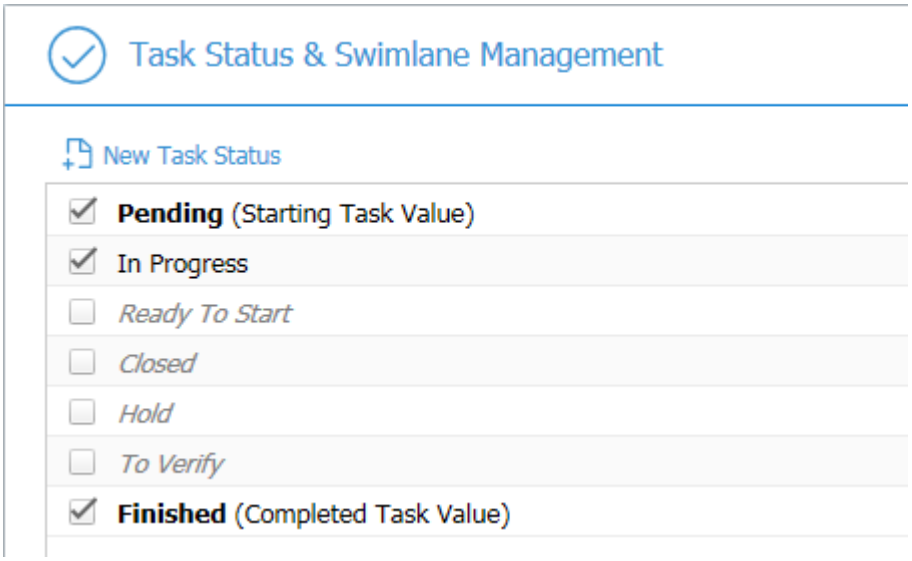
   If the Atlas Hub has Active Directory configured, you can use it by checking **Active Directory**.
6. Click **Project Access Rights**.
7. In the **View** pane, there are two sections: **Atlas** and **Rhythm**. Each has **Viewers** and **Contributors** buttons. Click one of the buttons. The list of users with that role in the Project is displayed.
8. 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.
9. Click **Make Public** to make the Project public. If you don't see that option, click and then select **Make Public**.
10. Click **Reset Permissions** to remove all users from roles in the Project. If you don't see that option, click and then select **Reset Permissions**. Doing this will give each user access to the Project as a *Contributor*. However, only users with *Server administrator* credentials can manage the Project.

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.

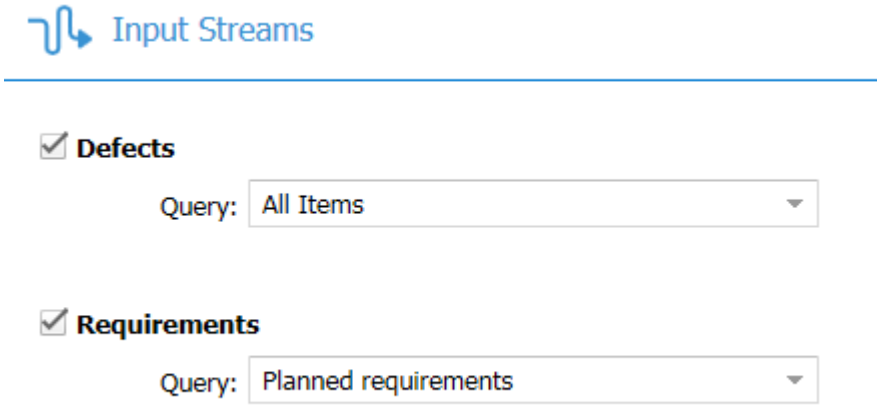


a) Click **New Task Status** to add a new **Status** Value.
b) Alternatively, you can double click any existing value to edit it.
c) Click the corresponding check box to enable that **Status** Value.
d) Drag-drop the items to place them in the order you prefer. This order represents how they will display 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`.

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 **Breakdown** view 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 an administrator sets 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.

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.

Tip: Click the **Gear** menu  at the top of the **User Information** pane to enable editing.

1. Log in with Project Administrator credentials.
2. Click  **Home**.
3. Click **Admin Tools**.
4. Click the **Users** tab.
5. Click **New User**. (To edit an existing user, select a user from the **Available Users** list and click ). Enter the following details:

   Logon Name Enter the name with which the user will use **New User**to log on.

   Distinguished Name If using **Active Directory**, enter the user's **Distinguished Name**.

   Password Enter the user's password. This can be changed by the user later.

   Confirm Password Re-type the password.

   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.

   Email Address Enter the user's email address.

   Important: In order to participate in Discussions, you must enter a valid email address.

   Phone Number Optionally enter the phone number,

6. Enter the user **Privileges**:

   Check the **Server Administrator** check box to make the user a *Server Administrator*.
7. Enter the user **Login Status**:

   Check **Suspended** to lock the user out.

   If the Atlas Hub has Active Directory configured, you can use it by checking **Active Directory**.

Editing Users

1. Log in with Project Administrator credentials.
2. Click **Home**.
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. Select the user in the list.
6. Click the **Gear** menu at the top of the **User Information** pane to enable editing.
7. Edit the proper fields.
8. Click **Save**.

Accessing Micro Focus Connect

When you connect a third party tool to the Atlas Hub via Micro Focus Connect, you can sync data into Rhythm. For more information, access the community for documentation and supported connectors for Micro Focus Connect.

1. Click **Home**.
2. Click **Admin Tools**.
3. Click the **Connect** tab. The **Connect** tab opens.
4. Click **Open**. Micro Focus Connect opens.
5. For additional information on Micro Focus Connect, refer to the Micro Focus Connect documentation: *http://documentation.microfocus.com/help/nav/4*

Planning

High performing agile teams organize and plan their work. The Rhythm **Planning** perspective enables teams to organize and **Breakdown** their Stories, manage their **Backlog**, as well as define the **Timeboxes** in which Releases and Sprints are incrementally delivered.

Breakdown View

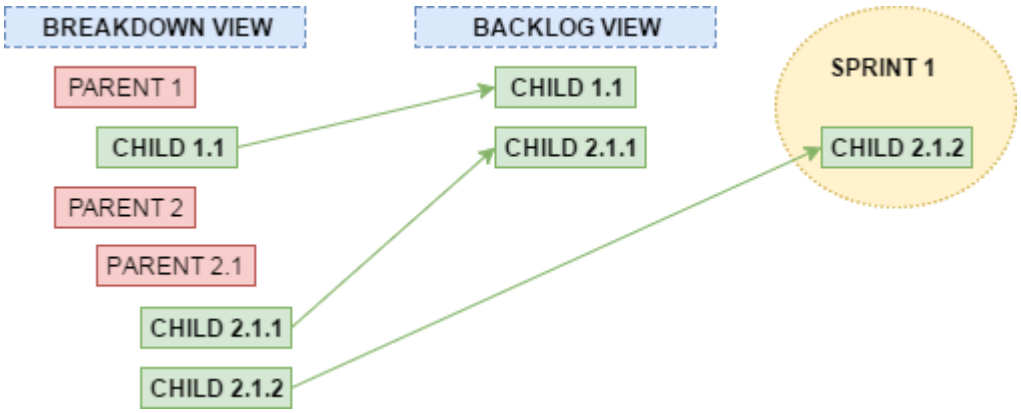
Click **Planning** > **Breakdown**.

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 an individual Story is too large and cannot be completed in an iteration or even a release. The individual Stories provide incremental progress toward the larger defined need. That means:

- Stories in the **Breakdown** view that do not have children and are not already scheduled in a Sprint are fed to the **Backlog** for ranking and then Sprint assignment.
- These Stories (Stories that are Parents) will never exist in the **Backlog** and cannot be assigned to a Sprint. They are in the **Breakdown** view allowing you to organize the smaller, actionable Stories.

See the following diagram:



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*

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 **Breakdown** view 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 an administrator sets up the Input Stream for the Project, you actively **Accept** or **Reject** each item that you want to add to the Backlog.

Note: If you do not have privileges that are equal to or exceed those of *Viewer* in Atlas, the **Info Stream** column will not display realistic information for Stories that originate from Requirements due to the lack of permissions (to access the trace to the Requirement).

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.

The following columns are visible in the Requirements Input Stream grid: `ID`, `Name`, `Type`, `Hub Priority`, `Priority`, and `Status`. Only the `Name` and `Priority` properties map into a Story.

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`. The following columns are visible in the Defects Input Stream grid: `ID`, `Name`, `Priority` , `Status`, and `Severity`. Only the `Name` field is used when imported into Rhythm.

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 it's 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 opens.

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 it's 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.

Retrieving a Story URL

The following shows you how to retrieve a Story's URL so that you can link back to it from other Stories or third-party applications.

1. Click **Planning** > **Breakdown**.
2. Click the **ID** column to open the **Story Editor**.
3. Your browser's Address bar will contain the full URL that you can copy.

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 *Story Types*.

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`. 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)*.
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 view a list of available Sprints. Select a new one if desired.
Tag	The **Tag** column allows you to 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*

Available Columns

Other columns include:

Author	Name of the original author of the item. Read-only.
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).
Created Date	Date that the item was created. Ready-only.
Global ID	This is a unique identifier for all items in the Atlas Hub.
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*.
Last Edited	Date that the item was last edited. Ready-only.
Last Edited By	Name of the last author who last edited the item. Read-only.
Revision	Version number of 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 main goals of the **Backlog** view are to rank your Stories and then add them to Sprints.

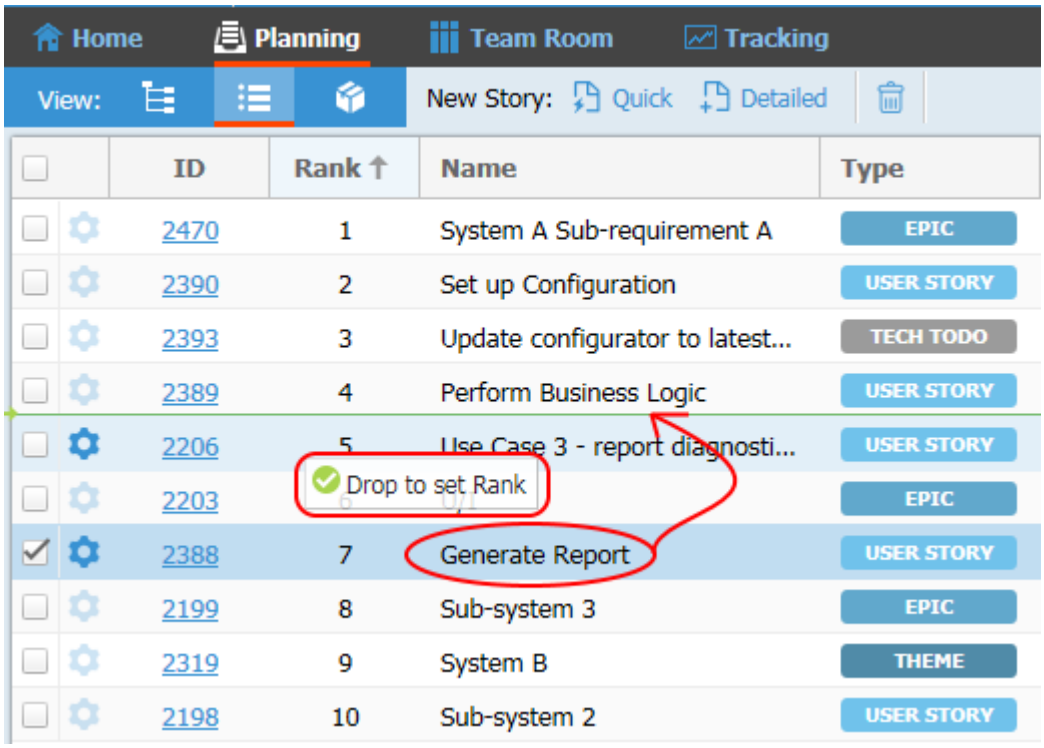
A Story's **Rank** is a numerical value used to represent it's position in the **Backlog**. Agile teams use Rank to identify relative priority and work sequence. When scheduling work (pulling items from the **Backlog** to a Sprint), Stories at the top of the **Backlog** are traditionally scheduled for 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*, *Rank Stories*, and *Copy Tasks from Other Stories*.

Ranking Stories

Follow the steps below to rank a Story.

1. Click **Planning** > **Backlog**.
2. Select a Story in the grid, click it and then drag and drop it into the position (rank) that you want.



When the Story is dropped, its **Rank** changes.

Sprints Panel

Click **Planning** > **Backlog** > **Sprints Panel**. This opens the **Sprints** 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*.
- *Go to the Team Room*.
- *Edit a Story*.
- *Edit the Sprint*.

Sprint Status

The top part of the **Sprints** 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 **Edit Sprint** to open the **Edit Sprint** dialog box 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 three ways:

Click Planning > Backlog > Sprints Panel.	Click **Edit Sprint**.
Click 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.

Then, use the following steps to edit a Sprint:

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

   Tip: Administrators can also modify all users' availability. See *Managing Team Capacity*.

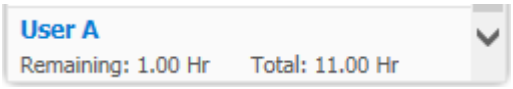
3. Click **OK**.

Managing Team Capacity

Although each user can modify their current availability (see *Managing Your Capacity*), an administrator can also over-ride these Sprint and Project level values for each users.

When set at the Project level, the value will be used for each Sprint. When set at the Sprint level, it's only for that particular Sprint.

This value is visible as **Total** in the **Task Owner** field in the **Team Room** and **Story Editor**:

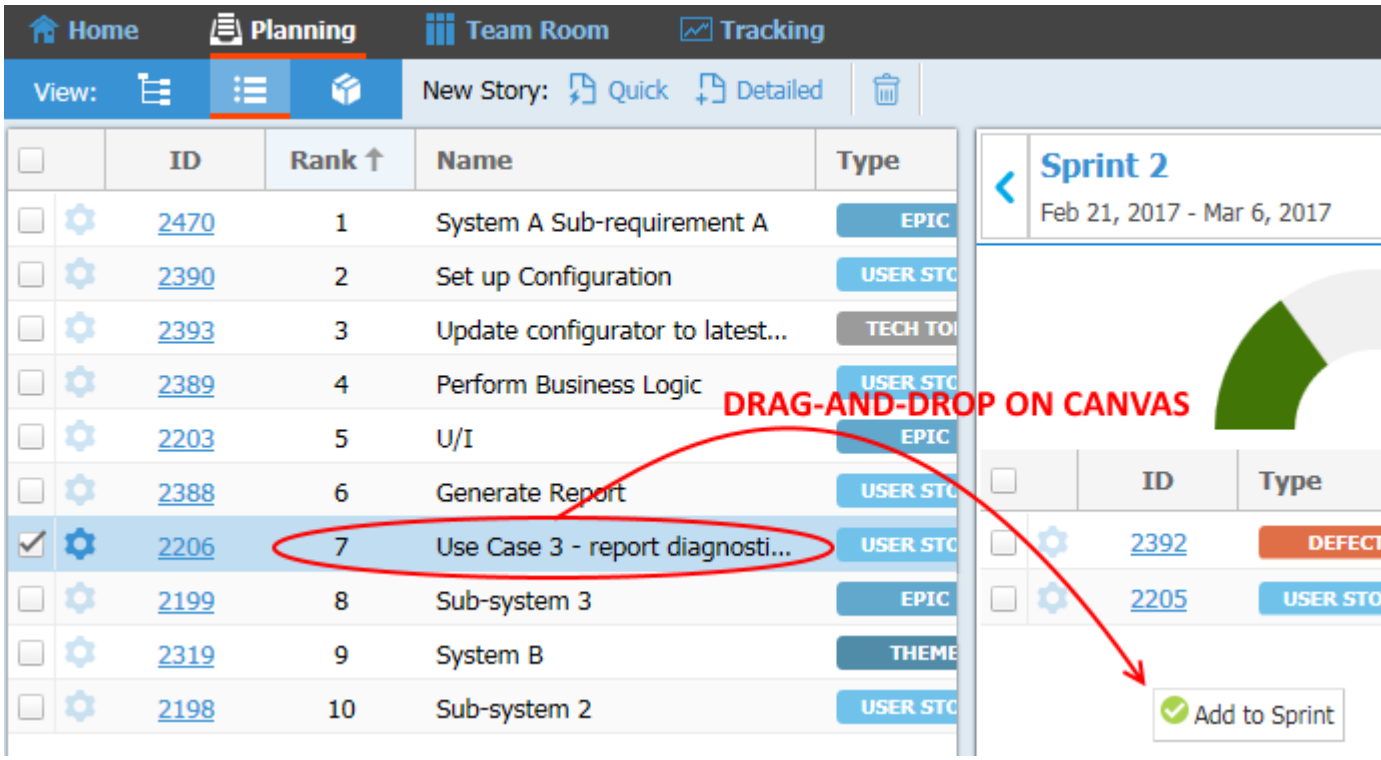


1. Open the **Edit Sprint** window (see *Editing a Sprint*).
2. In the **Team Availability** list, modify the hours available for each user for each Sprint/Project.
3. When complete, click **OK**.

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.

Sprints 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 *Story Types*.

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`.

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.

Tag The **Tag** column allows you to 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*

Available Columns

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

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*.

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).

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

Global ID This is a unique identifier for all items in the Atlas Hub.

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*.

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

Last Edited By Name of the last author who last 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.

Revision Version number of the item. Read-only.

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 A Story's **Rank** is a numerical value used to represent it'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.

Tag The **Tag** column allows you to 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*

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 *Story Types*.

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

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

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*.

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).

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

Global ID This is a unique identifier for all items in the Atlas Hub.

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*.

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

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

Revision Version number of the item. Read-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)*.

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*.

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 or Release.
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.
Release	Currently assigned Release for the Sprint. Double click to enable the list for choosing a new one.
Capacity	The number of Story points that you expect to be able to complete in a Sprint.

Author	Name of the original author of the item. Read-only.
Created Date	Date that the item was created. Ready-only.
Global ID	This is a unique identifier for all items in the Atlas Hub.
Last Edited	Date that the item was last edited. Ready-only.
Last Edited By	Name of the last author who last edited the item. Read-only.
Revision	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** (in Story Points).
6. Select the **Start Date**.
7. Select the **End Date**.
8. Click **OK**.

Changing the Weekly Capacity of a Release

This release-level value is the weekly capacity available for each Sprint (in Story Points). 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** (in Story Points).
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*.

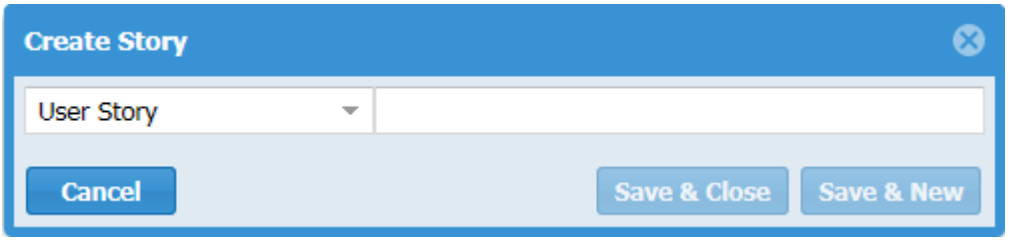
ID	Unique ID of the item. Read-only.
Name	Item Name. In most cases, you can double click to edit.
Start Date	Planned Start Date of the Sprint.
End Date	Planned End Date of the Sprint.

Stories	Total number of Stories in the Sprint or Release.
Weekly Capacity	This release-level value is the weekly capacity available for each Sprint (in Story Points). 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 (in Story Points). 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 last edited the item. Read-only.
Revision	Version number of the item. Read-only.
Global ID	This is a unique identifier for all items in the Atlas Hub.

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.

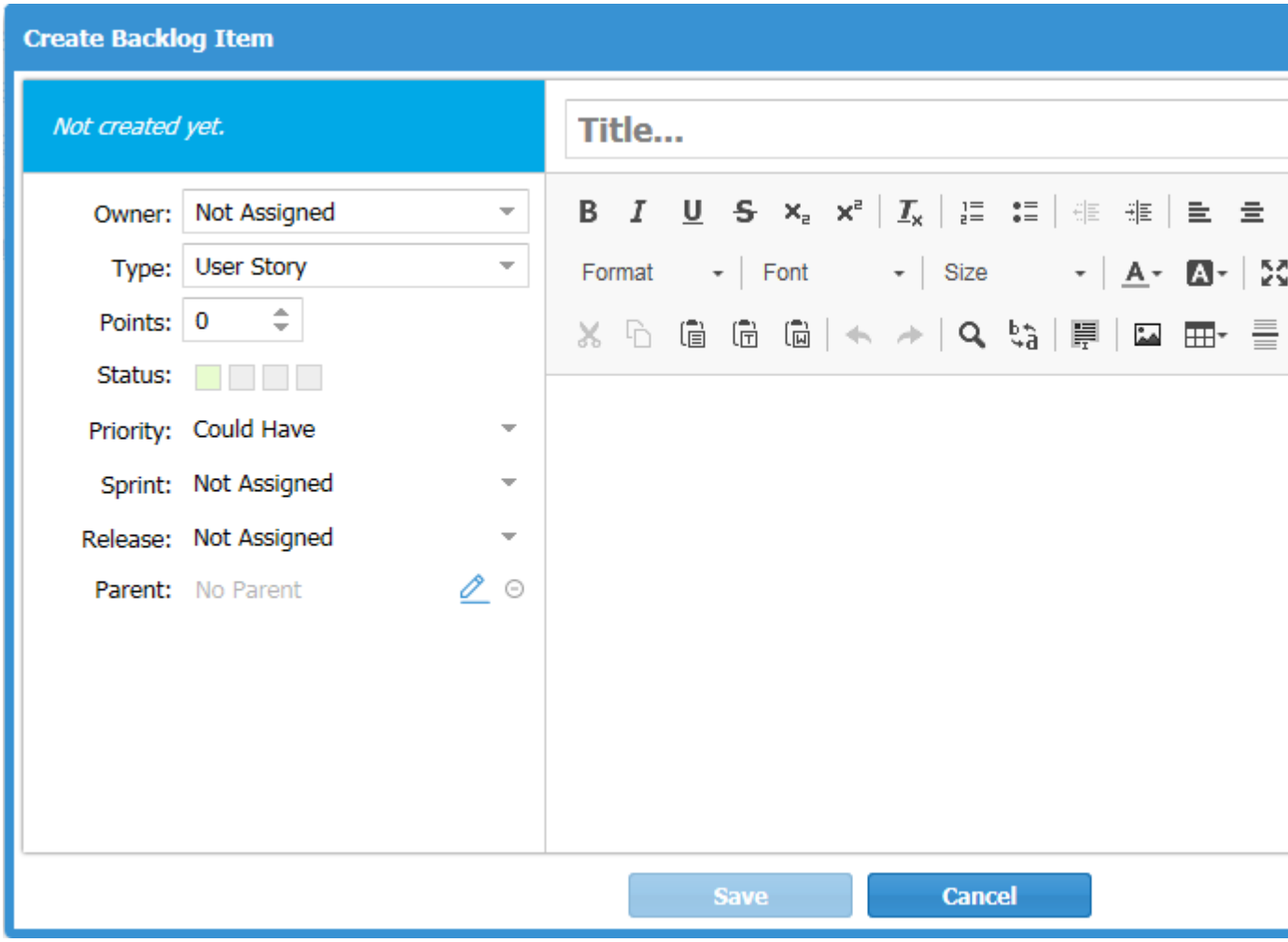


In each perspective, look for **New Story**: **Quick** | **Detailed**.

For more information, see *About Stories*.

To create a detailed Story:

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



2. Enter the details for the Story:

Title	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. 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`, `Should Have`, `Could 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

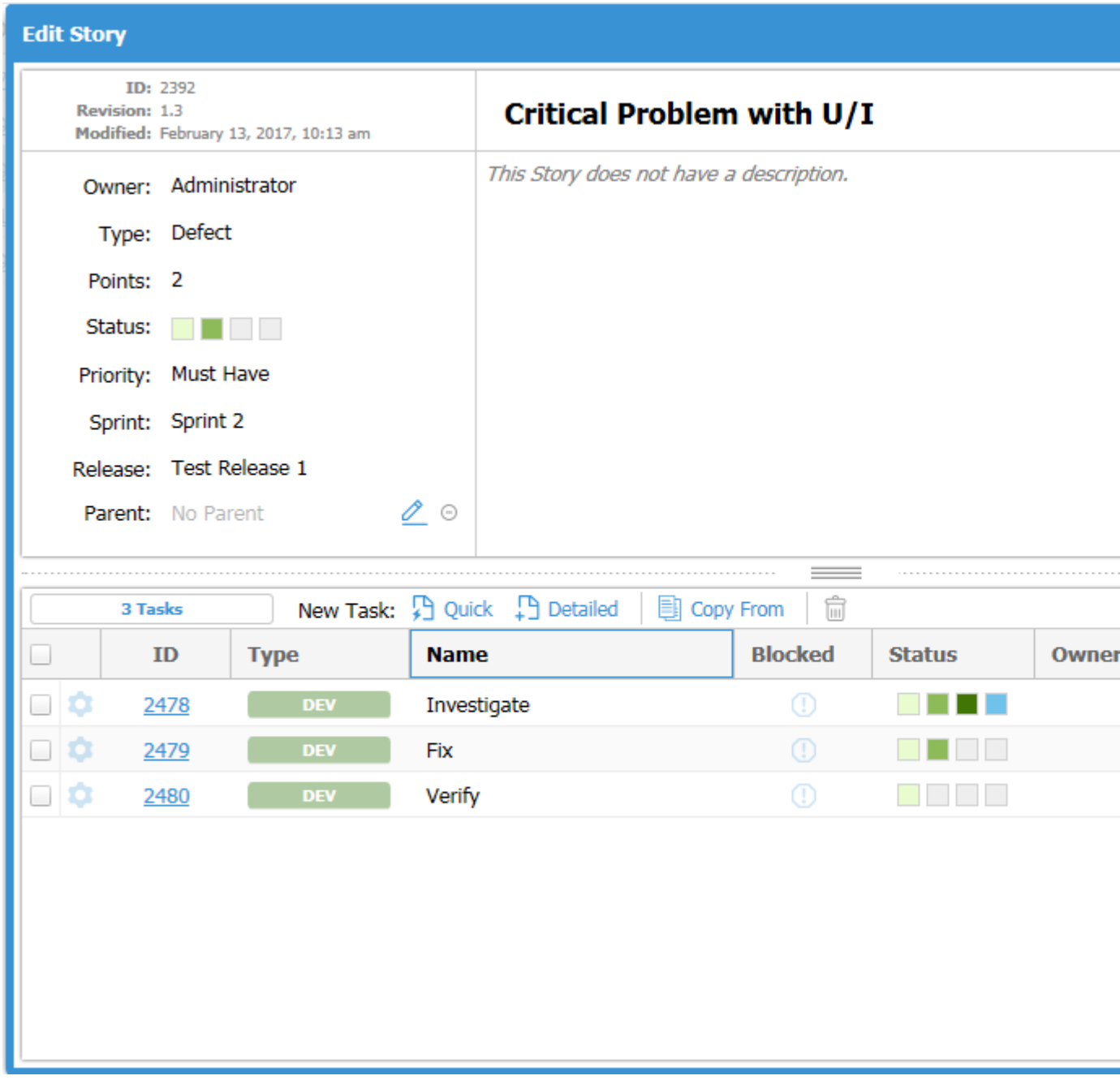
Use the steps below when you want to add more detail to a base Story or to begin adding tasks to a Story.

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

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:

Title	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. 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`, `Should Have`, `Could 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**.

Tip: To change multiple rows simultaneously:

1. Show the **Release** column in the grid.
2. Select multiple rows.
3. Double click any **Release** cell and select the new value.
4. Click **Save**.

Quick Find

When you want to quickly search for a string in the **Planning** perspective and don't need to create a filter:

1. Click either **Planning** > **Breakdown** or **Planning** > **Backlog**.
2. Put your cursor in the **Quick Filter** field.
3. Type the text to search for and click `Enter`. Your results show in the grid. Click **Clear Filter** to remove the results.

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.

Tip: When you apply a filter in the **Team Room**, the data in the **Team Overview** represents only that of the applied filter.

Tip: Use the browser **Address** bar if you need to copy a link to the current Sprint.

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.

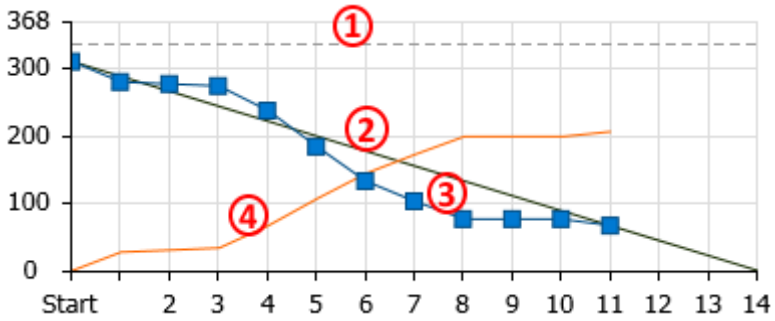
Team Overview

The Team Overview pane provides graphs and charts and informative data about your sprint. The pane can be expanded or collapsed using the arrow to the right .

Burndown

The **Burndown** chart is a run-chart of outstanding work that shows the total number of hours on the vertical access with number of days on the horizontal access. This chart is used to help predict when the work will finish.

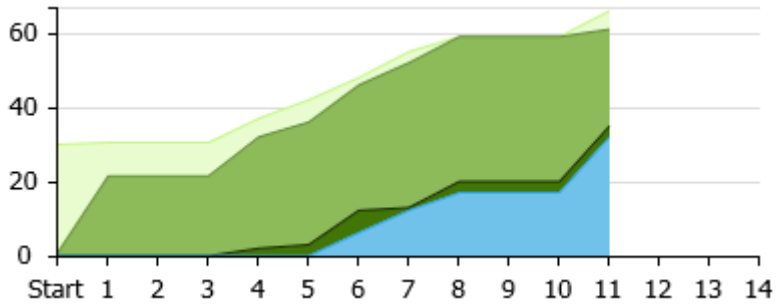
1. The horizontal dashed line at the top represents the team capacity.
2. The solid line represents the ideal Burndown rate.
3. The blue line with boxes represents the actual hours remaining and should be trending down.
4. The solid orange line (Burnup) indicates the time recorded by the team and should be trending up, ideally an inverse of the boxed line.



Tip: When a Quick Filter is selected, all the lines represent the currently applied quick Filter. For example, you can select a team member and see their individual Burndown. For more information, see *Managing User Capacity*.

Cumulative Flow

The **Team Room Cumulative Flow** chart represents the amount of work in the Sprint in different states for each day of the Sprint. The vertical axis represents the points in the Sprint. The horizontal axis represents each day of the sprint. It includes **Points Not Started** (light green), **Points In Progress** (green), **Points Completed** (dark green), and **Points Accepted** (blue). The height of the chart defines the scope. If something is added or the estimate is increased, then the whole chart gets taller. If something is removed or the estimate decreased, then the chart gets smaller. It provides the ability to see changes in scope in the sprint.



Points by Type

The **Points by Type** graph provides a pie chart of the distribution of percentage of work based on the types of Stories. Click one of the types to apply a Quick Filter to see just those items.

Health & Progress

The information in this list contains data points of the Sprint of which you need to be aware. There are positive indicators (✔) and trouble indicators (⚠):

- Number of blocked Stories.
- Stories not estimated.
- Stories without Tasks.
- Tasks not estimated.
- Tasks with actual hours greater than estimated hours.

Click any of the items in the list with a ⚠ to apply a filter to only show those items.

When a filter is applied, you can click the clear icon (⌫) to clear any filter.

Team Room Views

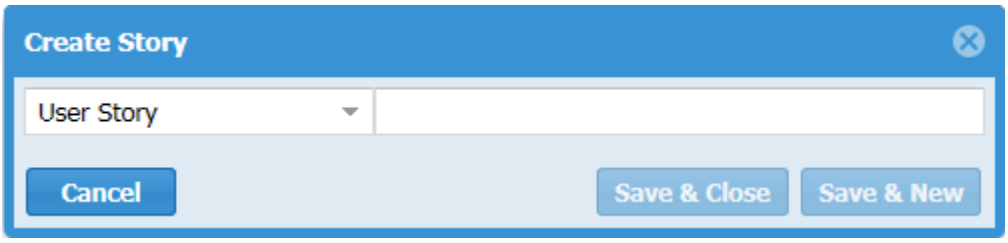
Sprint List Contains a list of the Stories contained in the selected Sprint. You can expand them to see the Tasks. You can also double click for in-line editing.

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 ⌄. You can change the available status columns. See *Change Task Status Values (Swimlanes)*.

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.

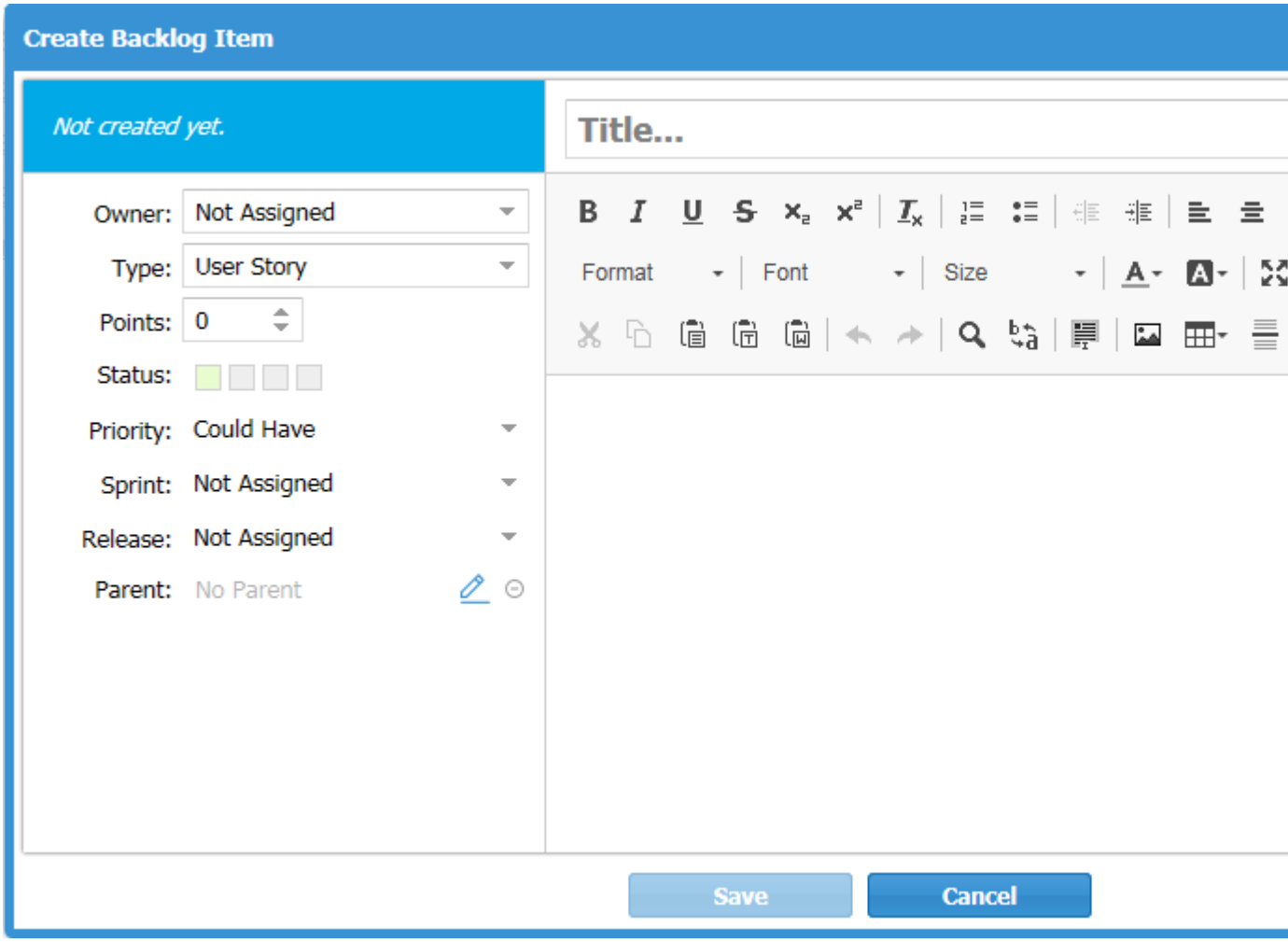


In each perspective, look for **New Story**: **Quick** | **Detailed**.

For more information, see *About Stories*.

To create a detailed story:

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



2. Enter the details for the Story:

Title	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. 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`, `Should Have`, `Could 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**.

Using the Story Editor

Use the **Story Editor** to create your Story. The **Story Editor** contains four sections:

Story Details	This pane in the top-left contains the following fields: **Owner**, **Type**, **Points**, **Status**, **Priority**, **Sprint**, **Release**, and **Parent**.
Title and Description	The **Title** is a standard field but **Description** uses a rich-text field with all of the editing capabilities that you would expect.
Tasks Pane	Define your Tasks for the Story in the **Tasks** pane. For more information, see *Working with Tasks*.
Extensions Pane	The expandable right-hand pane allows you 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*.

About Stories

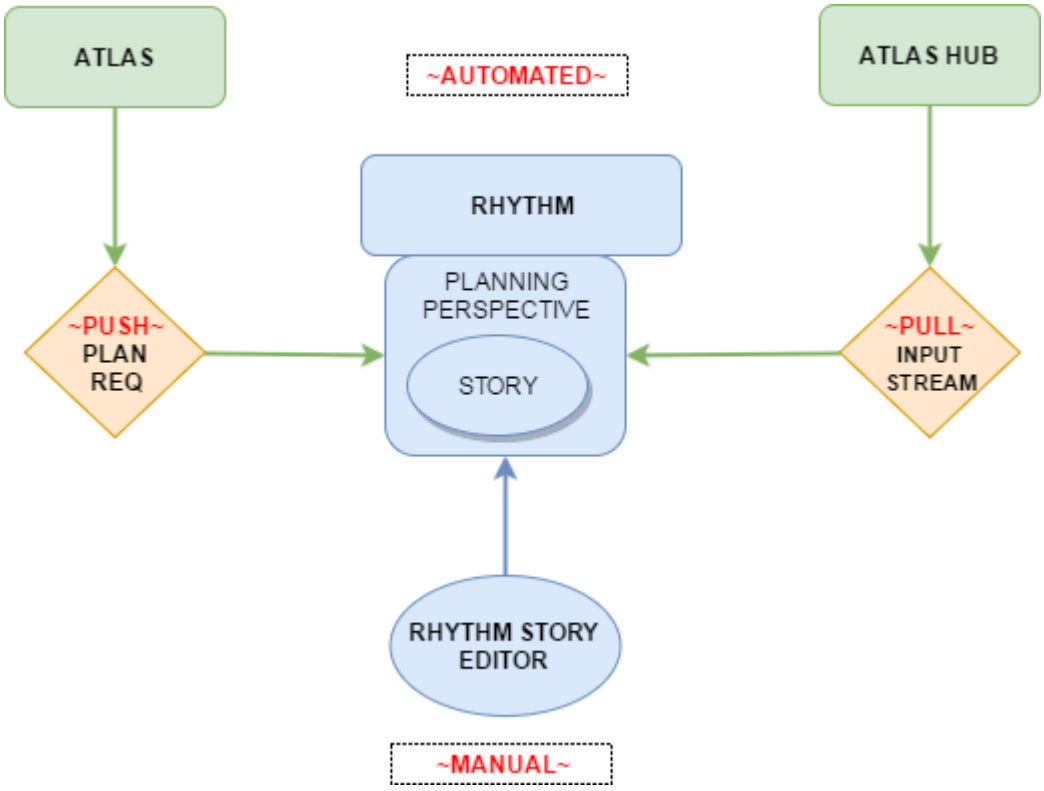
A *User Story* is a definition of a discreet unit of work to perform on your product. Stories exist in the **Backlog** or in a Sprint and are modified with the **Story Editor**. See *Using the Story Editor*.

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

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

You can also automate the creation of Stories using other tools in the Atlas Planning and Tracking Suite:

- Use Input Streams to pull in Requirements and Defects as Stories. See *Configuring Input Streams*.
- Use Atlas to push full Plans or individual Requirements into Rhythm. See *Using Rhythm with Atlas*.



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

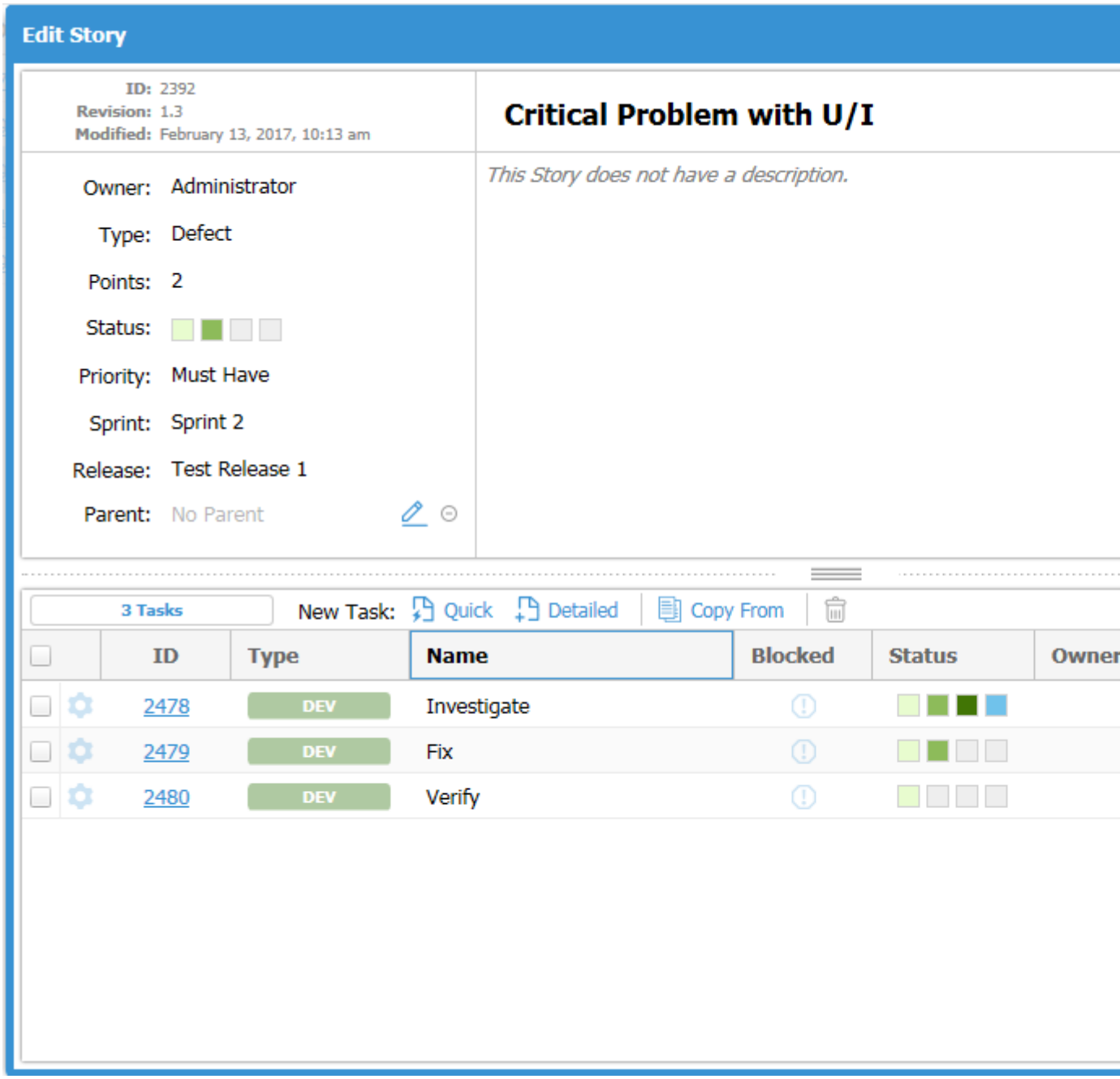
Editing a Story

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:

Title	Enter a descriptive name for the Story.
Owner	Select the resource responsible for the Story.
Type	Select the Type of Story: `User Story`, `Technical To Do`, `Epic`, `Theme`, and `Defect`. 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`, `Should Have`, `Could 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*.

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. When there are attachments in the Story, the tab is decorated like this:  .
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`.

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 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**. If Tags exist, the tab icon is decorated like this: . There are two panels:

Assigned Tags	Contains any Tags already assigned to the Story.
Available Tags	Contains all available **Project** and **Server** 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.

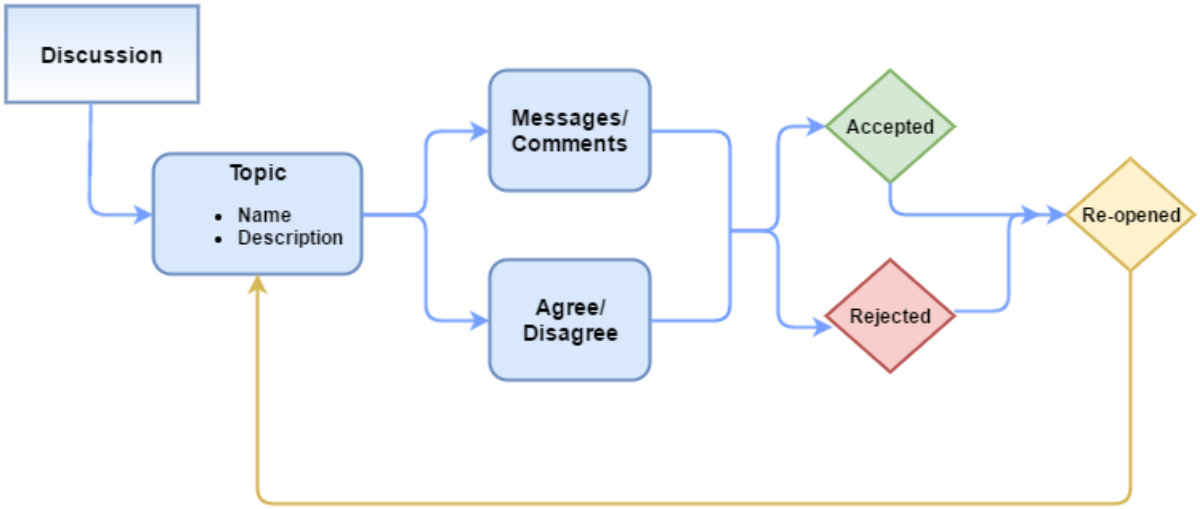
Discussions are available for each Story and for each Sprint. Click the icon to access them. For Stories, it's a tab in the right pane. For the Sprint, it's an icon in the top right of the **Team Room**.

When a Discussion exists in a Story, the icon on the tab in the **Story Editor** is decorated like this:

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 anywhere in the discussion thread.
- 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.

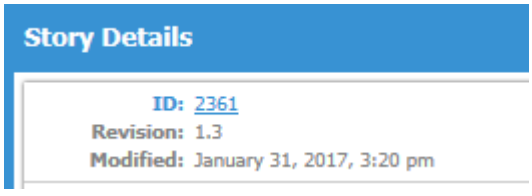
Topic Life Cycle Diagram



Accessing Stories in Native SCM Environments

When your native SCM environment is connected to the Atlas Hub, Rhythm provides links to those Stories when those Stories have files attached. To access your Story in your native SCM environment to check in/ check out files against a Story:

1. Open the **Story Editor**
2. If the Story contains files in your SCM environment, the **ID** field will containing a clickable link. Click it.



Your native SCM environment opens to the Story.

Note: Depending on your environment, you may need to have certain permissions for the project to view it.

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)*.

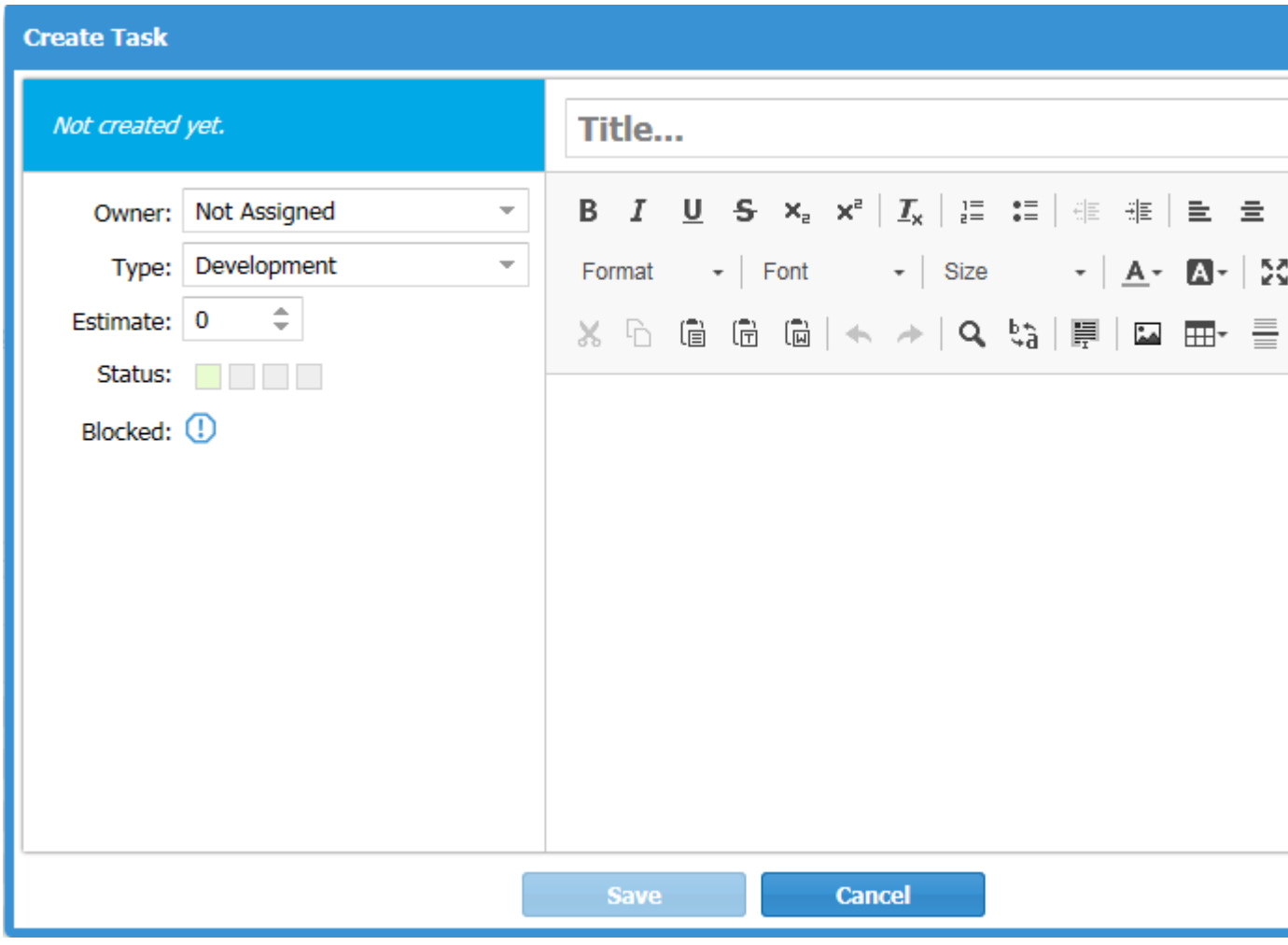
Tip: You can copy all Tasks from an existing Story by clicking **Copy From** on the toolbar. You'll navigate the list of Stories and select the one from which you want to import the Tasks. For more information, see *Copying Tasks from Other Stories*.

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 the **Story Editor**.
2. Click **Detailed Task**.



The **Task Editor** appears.

3. Enter the details for the Task:

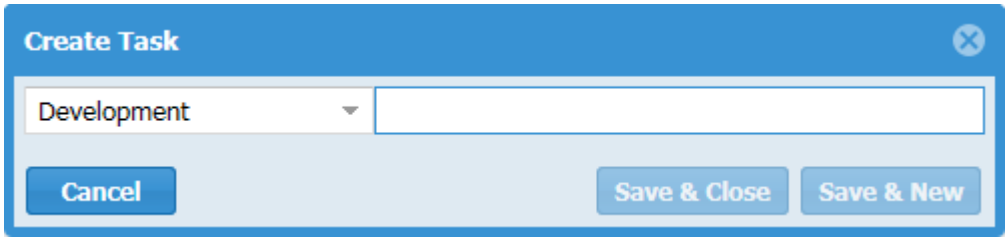
Title	Enter a descriptive name for the Task.
Owner	Select who will performing the Task.
Type	Select the type of Task it is: `Development`, `QA`, or `Documentation`.
Estimate	Enter the estimate of the number of work hours required to complete the Task.
Status	Click one of the Status boxes: `Not Started`, `In Progress`, or `Complete`. These are the system default values. Your administrator can change these values. See *Change Task Status Values (Swimlanes)*.
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.

4. Click **Save**.

Creating a Quick Task

To create a quick Task:

1. Open the **Story Editor**.
2. Click **New Task: Quick**.



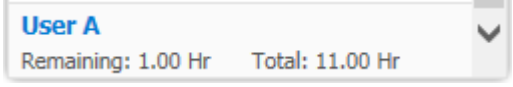
The **Create Task** dialog box appears.

3. Select the **Type**.
4. Type in the **Name**.
5. Click **Save & Close** or **Save & New**.

Assigning and Estimating Tasks

The following should be considered and noted when planning or tracking Task estimates, Actual Hours worked, and individual User Capacity:

- Each User should enter their Project or Sprint capacity. See *Managing User Capacity*.
- When assigning an Owner to a Task, a User's **Total** and **Remaining** hours are indicated in the list.



- To see these values, the following is required:
  1. The Project must be marked `Private`.
  2. The Story must be in a Sprint.
  3. They are only available in the **Team Room** and **Story Editor**.

- If you edit the **Task Estimate** field, the capacities are calculated and updated for the current Owner if there are no work records, otherwise it will calculate based on the remaining work (**To Do**).
- If you change a User, it will update both the old and new User to reflect the newly added (for the new user) and removed (for the old user) estimated hours of work remaining on a task.

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.

   Tip: Click the **Preview Tasks** icon to display a popup list of the Tasks in the Story. Click outside the window to make it go away.
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.
- When a Task is estimated or work records are added, these values are saved and are available to see when you select the **Owner** field of the Task. For more information, see *Assigning and Estimating Tasks*.

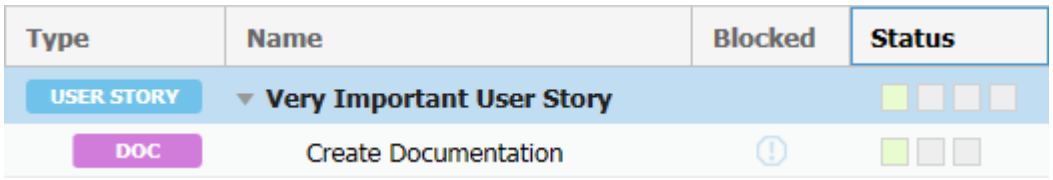
Blocking a Task

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*.

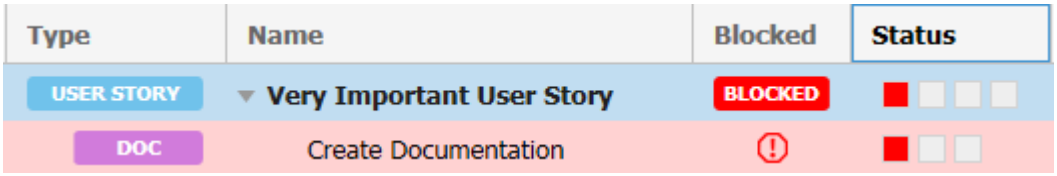
Tip: If you are in the **Task Editor**, you can click the Blocked icon in the left pane to block a Task.

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



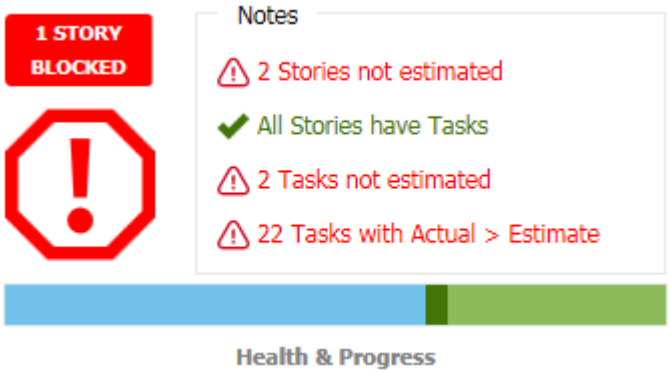
2. Hover over the Block icon in the **Blocked** column for the Task you want to block.
3. Click the icon when it enables. The **Provide Blocking Reason** dialog box opens.
4. Enter a reason in the field and click **OK**. This automatically creates a Discussion Topic in the Story and notifies the Story 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:



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.



Tip: Click on the blocked icon to filter the **Team Room** to only see the blocked Task.

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).

Sprint Activity Window

The **Sprint Activity** window is available in the **Team Room** and provides activity that occurs on all Tasks, Stories, Discussions for all users. You can filter Tasks by **Date** (From, To), **Type**, **User** and many more (see below). You can use this information to:

- Provide detailed support or explanation for data in the **Team Room** Charts (status changes, work record hours, etc).
- Filter by **Type** to see what was `Added/Created` or `Removed/Deleted` and by whom. You can also isolate Tasks by: `Edited`, `Worked`, `Discussed`, `Carry Over`, `Blocked/Unblocked`.
- Use the data however you need to as the basis for your daily stand-ups or Sprint retrospective.

From the top-right of the **Team Room**, click the **Sprint Activity** button: .

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 to the Team Room 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 **Sprint List** or the **Sprint Cards** view.
2. Click the last box in the **Status** column to **Accept** the Story.

Changing a Sprint's Capacity

A Sprint's capacity is measured in Story Points. You can modify 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, click **Edit Sprint** 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 CARRIED OVER image will display in the **Carried Over** column in grids.

Retrieving a Story URL

The following shows you how to retrieve a Story's URL so that you can link back to it from other Stories or third-party applications.

1. Click **Team Room** > **Sprint List** or **Team Room** > **Sprint Cards**.
2. Click the **ID** column to open the **Story Editor**.
3. Your browser's Address bar will contain the full URL that you can copy.

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 *Story Types*.
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`.

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 to 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 Stories, this is a roll-up value. For more information, see *Adding Work Hours to a Task*.

Actual Indicates the actual amount of hours worked on the Task. For Stories, this is a roll-up value. For more information, see *Adding Work Hours to a Task*.

To Do Indicates the remaining hours left to work on the Task. For Stories, this is a roll-up value. 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. 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

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

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).

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

Impact This column displays the Change Packages icon </> if the Story or Task is related to a Change Package. Additionally, the icon will be decorated with the number of items contained in the Change Package. Click the icon to open the **Change Packages Viewer**.

Global ID This is a unique identifier for all items in the Atlas Hub.

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*.

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

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

Revision Version number of the item. Read-only.

Using the Change Packages Viewer

When you are in the **Team Room** or the **Story Editor**, you have the option of adding the **Impact** column to your grid. When you do this, you will see the number of Change Packages related to your Story/Task.

In the **Story Editor**, the Task grid will display the number of related Change Packages for each task. In the **Team Room** grid, the count of all Change Packages related to your Story/Task are displayed. Story Change Package counts represent the number of all related Change Packages (directly or indirectly related through Tasks).

Click the row in the **Impact** column </> to open the **Change Packages Viewer**.

Change Packages for CP Story

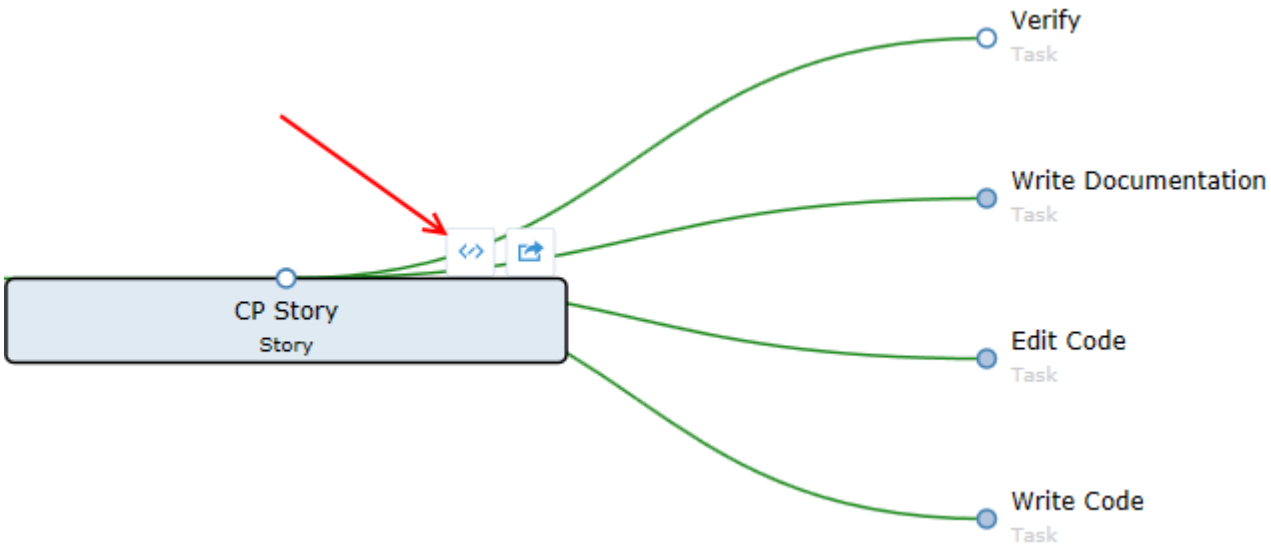
Name	Item Type	Change Type	Commit Action
Initial Checkin			
Your Doc.txt	File	New in workspace	Add
Source.txt	File	New in workspace	Add
My Doc.txt	File	New in workspace	Add
More Source.txt	File	New in workspace	Add
Write Code	Task	Unchanged Process Item	Mark Resolved
Documentation Changes			
My Doc.txt	File	Modified in workspace	Checkin
Write Documentation	Task	Unchanged Process Item	Mark Resolved
Dev WIP			
Source.txt	File	Modified in workspace	Checkin
More Source.txt	File	Modified in workspace	Checkin
Edit Code	Task	Unchanged Process Item	Mark Resolved

The Change Packages viewer displays:

- All items contained in the Change Package, grouped by **Name**. (You can group by any of the columns).
- The **Item Type**.
- The **Change Type**.
- The **Commit Action**.

If you click an item, such as a File, it will attempt to open the native application from which the item came. Rhythm assets, such as Tasks, will be opened in Rhythm.

Tip: You can also open the **Change Package Viewer** from within the **Relationship Diagram** window. Click the button to open the window:



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.

Tip: When you apply a filter in the **Team Room**, the data in the **Team Overview** represents only that of the applied filter.

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`.

After being applied, the filter icon changes to .

Note: When a filter is applied, you can click the clear icon ( ) to clear any filter.

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 them 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.

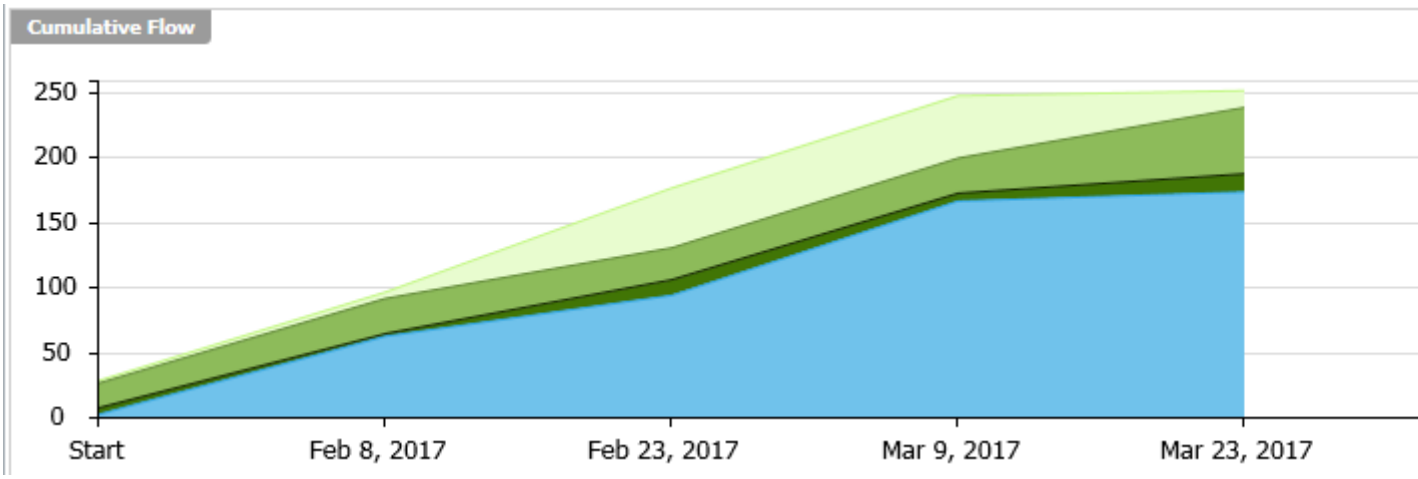
Release Health

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 Cumulative Flow

The **Tracking Cumulative Flow** chart represents the amount of work in the Release in different states for each Sprint of the Release. The vertical axis represents the points in the Sprint. The horizontal axis represents each Sprint of the Release. It includes **Points Not Started** (light green), **Points In Progress** (green), **Points Completed** (dark green), and **Points Accepted** (blue). The height of the chart defines the scope. If something is added or the estimate is increased, then the whole chart gets taller. If something is removed or the estimate decreased, then the chart gets smaller. It provides the ability to see changes in scope in the Release.



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**. When a Relationship exists in a Story, the icon on the tab is decorated to indicate that a Relationship exists, like this:

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.

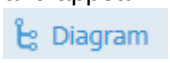
Creating a Relationship

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 

above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

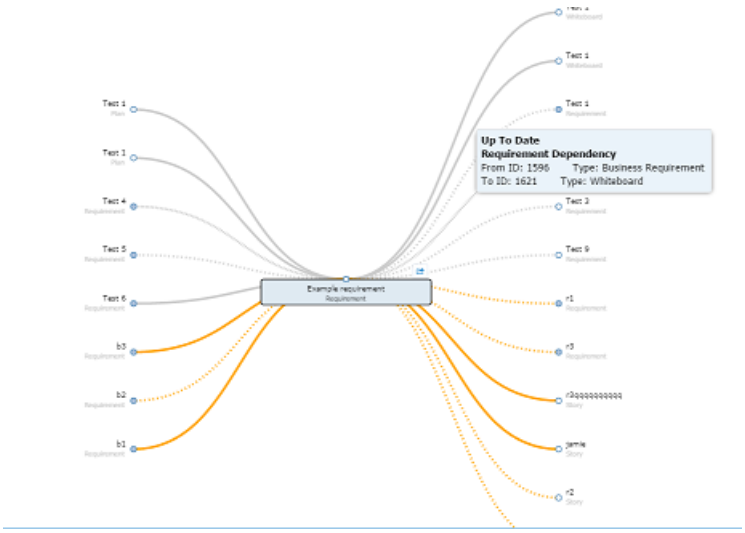
- Items to the left of the Story link *to* the Story. Items to the right of the selected Story link *from* the Story.
- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the Story 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 Status**, **Relationship Type**, or **Item Type** to filter the diagram based on your selections.
- If an item is a Change Package, you can open the **Change Package Viewer** directly from the diagram. Click the button  in the viewer.

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`.

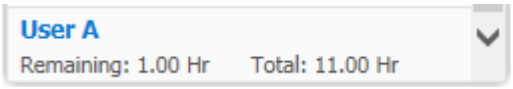
Suspect When a relationship is in this status, the available actions are `Compare`, `Update`, `Defer` and `Remove Relationship`.

Managing Your Capacity

For each Project in which you are a *Contributor*, you can specify your Project and Sprint level availability.

When set at the Project level, the value will be used for each Sprint. When set at the Sprint level, it's only for that particular Sprint.

This value is visible as **Total** in the **Task Owner** field in the **Team Room** and **Story Editor**:



Note: Administrator's can set each user's availability using the Edit Sprint dialog. For more information, see *Managing Team Capacity*.

1. In the top right corner of the application, click your **<User Name>** and select **Availability...** The **Availability** dialog box opens with a list of Projects and Sprints.
2. To set a Project-level availability, double click in the **Availability** column and type in the number of hours that will be used for each Sprint in the Project.
3. To enter hours for a certain Sprint, expand the Project node and enter the hours in the proper row.
4. Click **OK**.

When filtering on this user in the **Team Room**, the **Burndown** will contain a horizontal orange dashed line to represent the availability of the individual. For more information, see *Assigning and Estimating Tasks*.

Search

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

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

Type the string you want to search, and click **Search**.

Rhythm does not search common words, such as "and", "if", "else", "then", 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`.

Rhythm 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. The Item Type column displays the type of item that matched the search criteria.

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

Quick Look	Opens the item in an editor for you to review.
Go To	Jump to an item in your search results. If an item is in a different project, Rhythm switches your context to the other project as long as you have permission to view it.

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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