Dimensions CM Pulse
Agile – Evaluation Tutorial

Version 1.0

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Contents

Introduction

What is Agile?

This is a new extension to Pulse introduced in CM 14.3, and allows you to plan and track the progress of requests being raised.

It allows you to do the following:

- Organize requests into backlogs.
- Execute requests in iterations.
- View metrics.
- Visualize and track the status of requests.
- Manage the movement of requests between iterations.
- Integrate with Dimensions CM request lifecycles.

Requirements

This tutorial requires a Dimensions CM 14.3 installation that has the CM_TYPICAL base database installed on it.

Scenario

The following work flow describes a very simple scenario, and does not reflect the full complexity of real-world practice. However, the emphasis on simplicity serves as a gentle introduction to the whole agile process.

Step 1: Add roles

NOTE: We are going to add some additional roles to ensure that the request can be actioned properly through its lifecycle.

- Start Desktop client and login as **dmsys** to the **cm_typical** base database.
- Click **File | Execute Server Command**
- Enter the following commands into the Command to execute window

```
aur dawn /role=implementor /part=qlarius:qlarius

aur dawn /role="qa manager" /part=qlarius:qlarius
```

- Click **Run**, check the Console window to ensure that both commands have return *Operation Completed*.
- Click **Cancel**.

Step 2: Create the Suite and Product

NOTE: Suites and Products

Pulse now organises streams by a hierarchy.

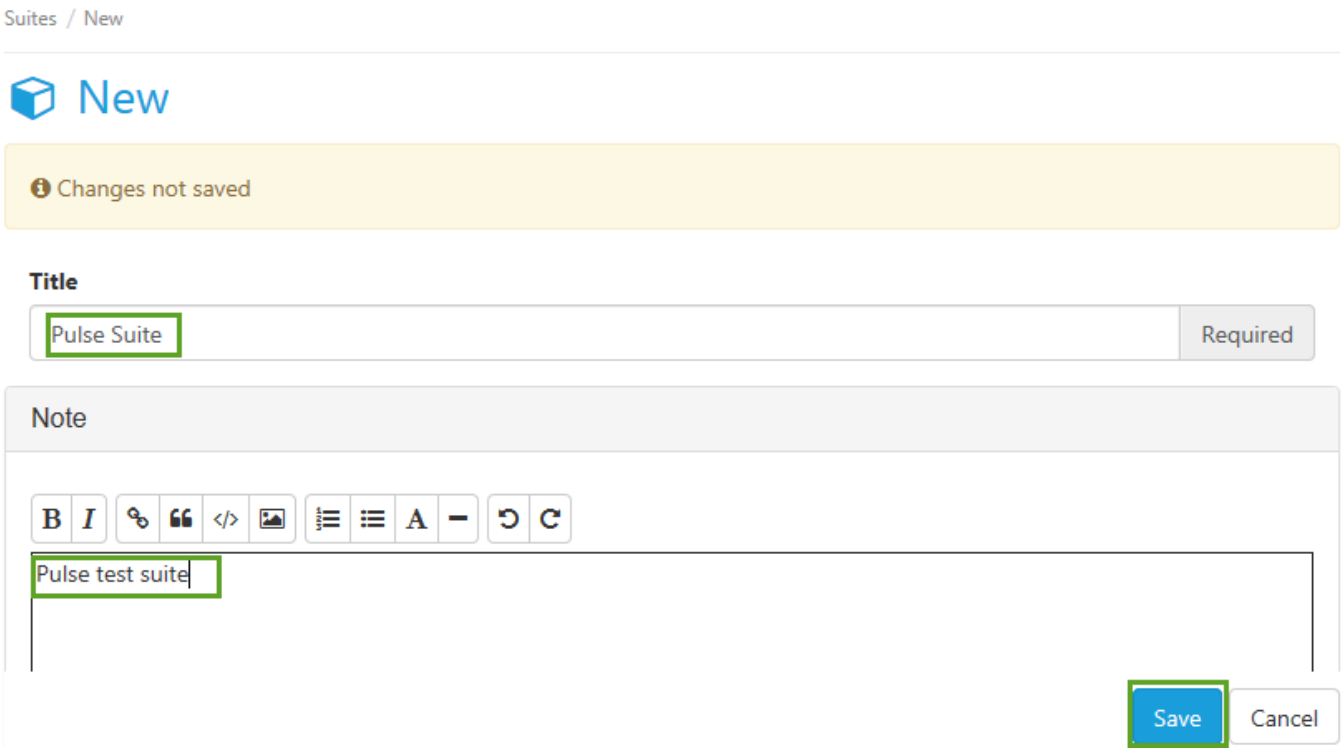
Suites can contain one or more Products, for example, Qlarius Online Insurance and Qlarius Online Banking.

A **Product** is a collection of CM streams, for example, the product Qlarius Online Insurance contains the streams QLARIUS:HOME, QLARIUS:AUTO, and QLARIUS:VACATION

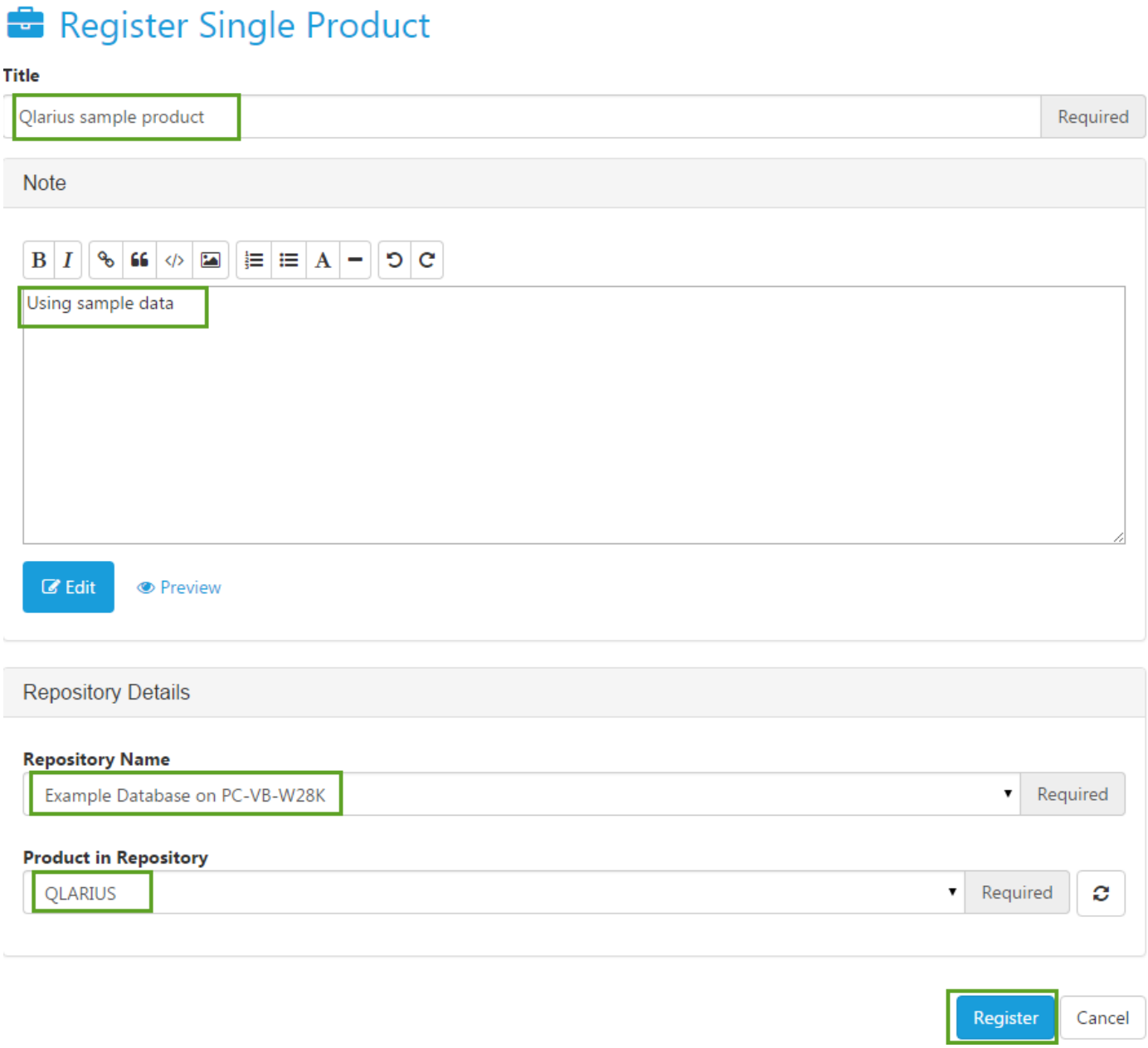
Tip If a suite containing the product has already been registered then go to Step 2: Configure Request Types.

- Access Pulse by going to http://<server>:8080/pulse
- Login as the Pulse administrator e.g. dmsys
- On the top status bar click on the **Suites** button

- Click on the button **New Suite** and define the following information



- Click on the newly defined Suite and click on the **Register product** button and select **Single Product** from the drop down, the supply a Title, select the existing repository and the existing **QLARIUS** product and click on **Register**.



- Click on the newly created **Qlarius Sample product** link and then click on **Register Stream**.

Note Once a product has been registered, Streams are automatically registered.

- Type the string **QLARIUS:JAVA_BRANCHA_PRJ** stream and an autocomplete drop down will allow the user to select the full name, then click on **Save**.

Note Pulse may respond that the steam is already registered.

Step 3: Configure Request Types

NOTE Request types are the CM requests types defined for the product.

In this step, we will ensure the CR request type is configured.

- On the top toolbar select **Suites** and the relevant Suite.
- Under Products select the product enable request types on e.g. **QLARIUS**.
- On the side menu select **Product Settings**.
- Select **Story Request Types**.
- Select the request type **CR**
- Under Attributes Mappings set **Acceptance Criteria** to **Details of solution given**.
- Click **Save**.

Step 4: Create a Backlog

NOTE Backlogs organizes and records the works to be completed.

In this step, we create a new backlog.

- Next to Product Settings select **Qlarius**.
- On the side menu select **Requests**.

NOTE The Requests menu is the entry point for Pulse Agile.

- On the Requests ensure **Backlogs** is selected and click **New**.
- Enter a title: **TestBL** and a description: **Test Backlog**
- Next to Owner and click **Add**
- Under Add Owner type **dmsys**, the dmsys icon appears click the icon click **Add Owner**.
- Click **Save**.

Step 5: Create a Feature

NOTE Features are similar to folders; they organize requests in a group. In this step we will create a new feature.

- Click the **TestBL** backlog and the **Content** tab.
- Click the blue **New** button and click **Feature**.
- Enter the Title: **New widget** and Description: **New feature** and click **Save**.

Step 6: Create a Request (Story)

NOTE Requests represent a single task or work unit and are similar to a *story* in Agile. In Pulse a Request is just Dimensions CM request.

- The new widget appears, ensure it is selected
- Click the **New** button and select **CR**
- Enter the following values

  Title: **New Widget**

  Summary: **Write the code please**

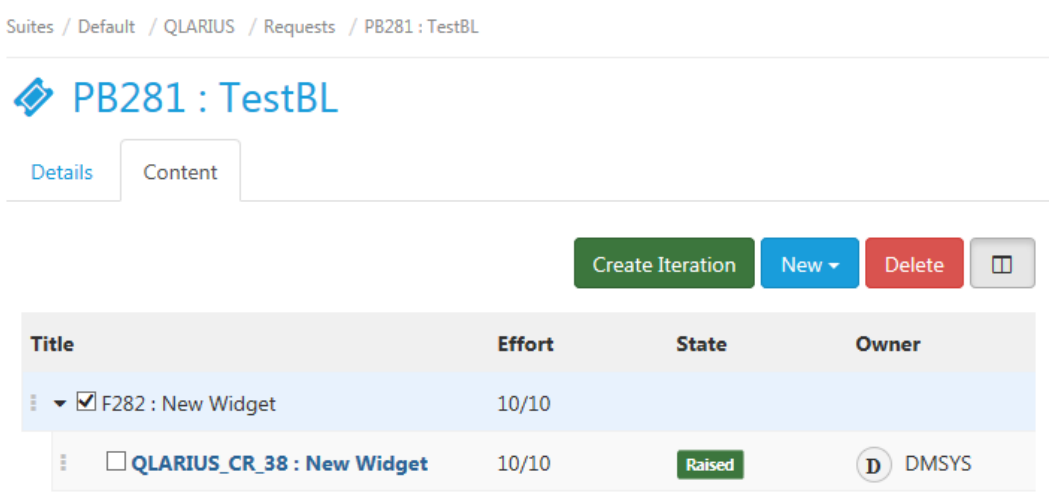
  Acceptance criteria: **New widget appears on the UI**

  Total Story Points: **10**

  Remaining Story Points: **10**

- Click the **Attributes** tab and specify the **Severity Priority** as **Medium**
- Click **Save**

The new Request should now appear under the feature



Step 7: Create an Iteration

NOTE Iterations represent a single development lifecycle known as a *sprint*, and usually lasts one or two weeks. Total and remaining work is tracked and recorded, as the sprint progresses the remaining effort estimate should decrease.

- Click **Create Iteration**
- Specify the following
  - Name: **Implement enhancements**
  - Duration: **One week**
  - Start and End date: *Leave as defined*
- Click **Start**

Step 8: View the Iteration

NOTE This view will give an in-depth insight into the current and remaining progress for the current iteration.

- Click the **Content** tab to view the Request assigned to the iteration in a table
- Click **Show Card Wall** to see the current status of the iteration as a virtual card wall

Step 9: Update the request

NOTE Initial analysis is made on the request and the hours of effort required are revised.

- Click the request link **QLARIUS_CR_...** that appears under Raised
- Click **Edit** to edit the request
- Click the **Attributes** tab
- Set **Contact details** to **Sam 12345**
- Click **Save**

Step 10: Action the request

NOTE The request is actioned to Under Work so progress can be made on the task.

- Click the **Action** to button and select **Under Work**
- On the dialog click **Action**
- In the left menu locate **QLARIUS** then to the right on the breadcrumb trail, click the back log **TestBL**

Step 11: Review the iteration and action the request

NOTE The card wall view is not only information but functional, allowing users to update and action requests directly from the view.

- On the side menu click **Requests**
- Ensure **Iterations** is selected rather than Backlogs
- Click on the **Implement Enhancements** iteration
- The Card Wall view should appear if it does not, then click **Show Card Wall**
- Notice the New Widget request now appears Under Work

We can also action a request from the card wall

- Click on the **New Widget** request (not the QLARIUS_CR_... link) holding the mouse button and drag to under **In test**
- The request update dialog appears set **Actual completed date** effort to **<today's date>**
- Click **Action**

NOTE The request New Widget now appears under In Test.

Step 12: Modify the remaining story points and close the request

NOTE Story points are assigned to a request to determine the estimated effort required to complete the task and the remaining effort required to complete the task.

Firstly, lets update and close the request.

- Click on the New Widget request (not the QLARIUS_CR_... link) holding the mouse button and drag to under **Closed**
- Under the **attributes** tab specify the following

  Enter test pass date: *<today's date>*

  Deployment date: *<today's date>*

- Click **Action**

Now update the request to show that work has completed and no more story points are remaining.

- The request appears under closed click on the request link **QLARIUS_CR_...** to edit it.
- Click **Edit**
- Change **Remaining Story Points** to **0**.
- Click **Save**

Let's view the updated Card Wall

- On the right hand side under Iteration click the link **Implement enhancements**.
- Notice that Remaining now shows as 0% and Done is set to 100%.

Further task

Create a backlog that uses multiple existing requests each with their own story points and add them to an iteration.

Glossary of Terms

Backlogs: a prioritized hierarchy of work, that may contain epics, features, and requests.

Epics: large units of work that typically are broken down into a smaller units, such as features and requests.

Features: key components of a product.

Requests: a single item of work that is equivalent to a story in Agile work management. Existing requests are consumed from Dimensions CM. If you create a new request in Pulse it is visible in all CM clients.

Iterations: one development cycle (a sprint), typically one to two weeks. An iteration includes the backlog requests your team are confident they can complete during the sprint. As the iteration progresses, the remaining effort required to complete the requests should decrease.

Further Information

More information on Pulse can be found in the online Documentation, go to: http://localhost:8080/pulse-help

More information on Agile: https://en.wikipedia.org/wiki/Agile_software_development