Clarizen Agile Project Management Application

1. After installing the Agile application, start by creating a new Agile/SCRUM project. You can use the SCRUM Development template under Clarizen Templates.
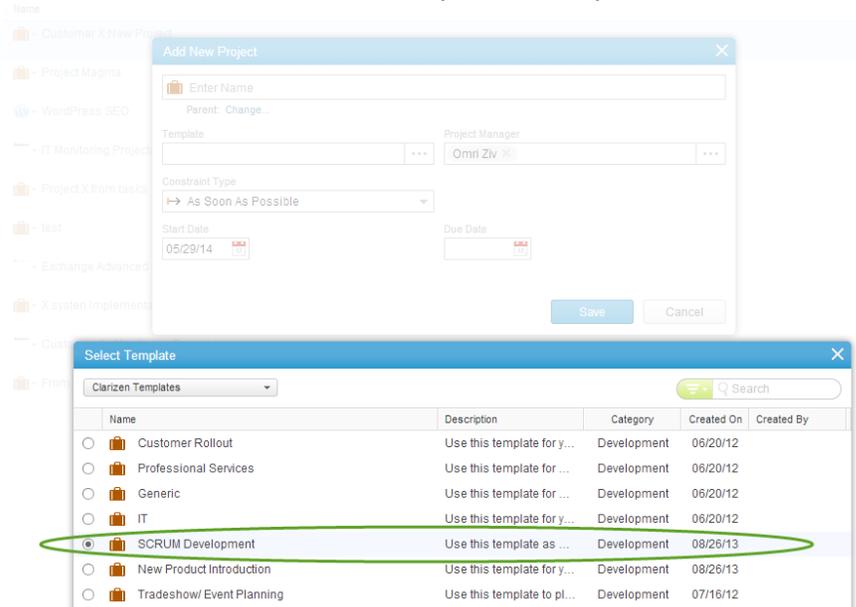
2. Under the project, notice the "Sprint Backlog" task hammock, which includes all the features to be developed in the following Sprints.

clarizen
the way to work
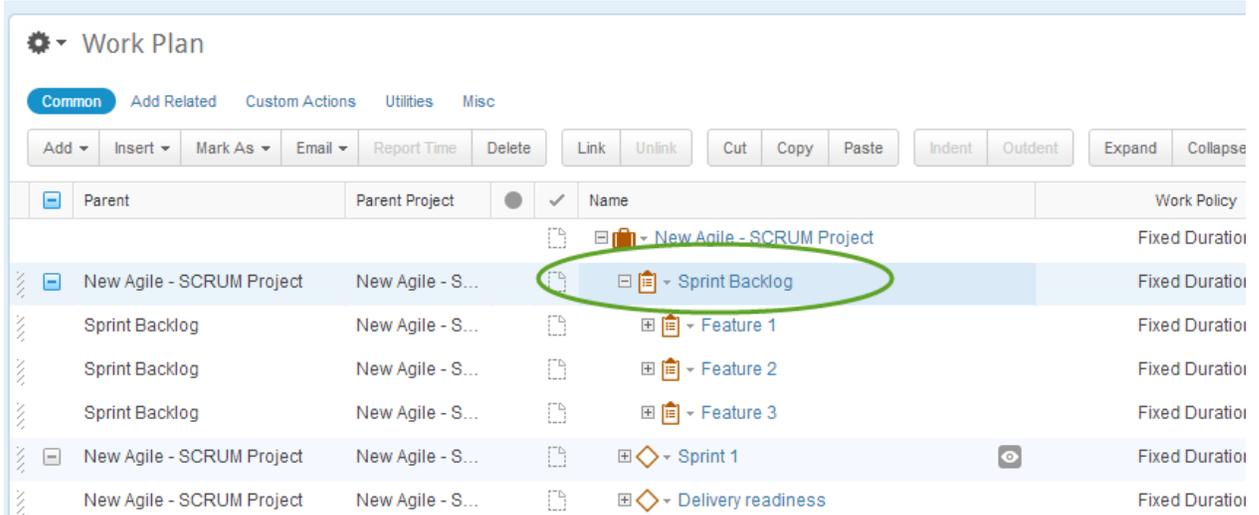
3. To add features to the backlog, you can access the new "Agile – New Backlog Request" custom action from the navigation panel.
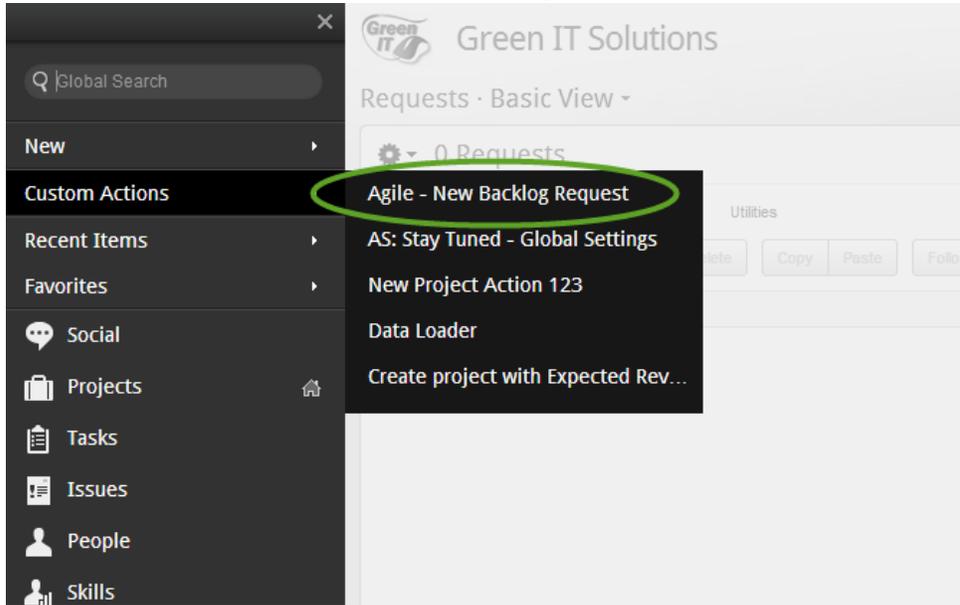

4. Make sure to enter a detailed description of the request.
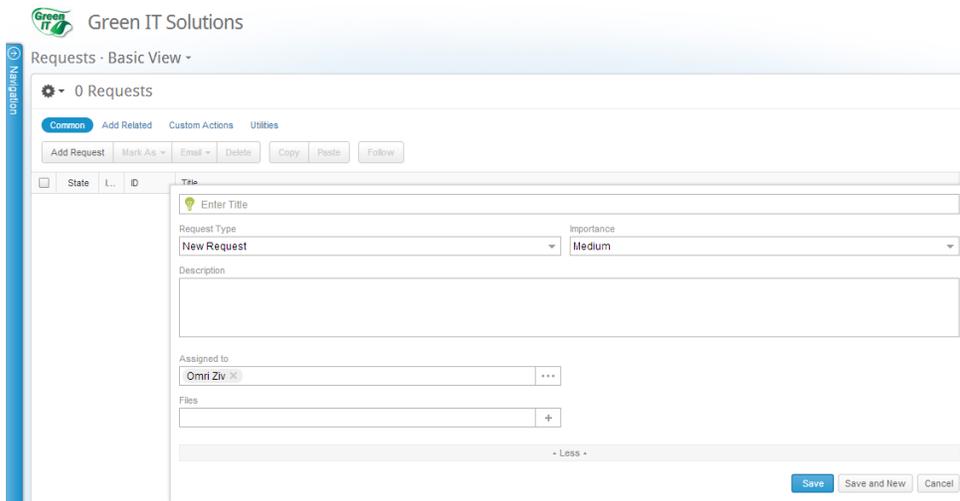
5. After the request has been created, the project manager can approve the new request and move it to the backlog. To move the request to the backlog, go to custom actions -> "Agile – Approve for the backlog"
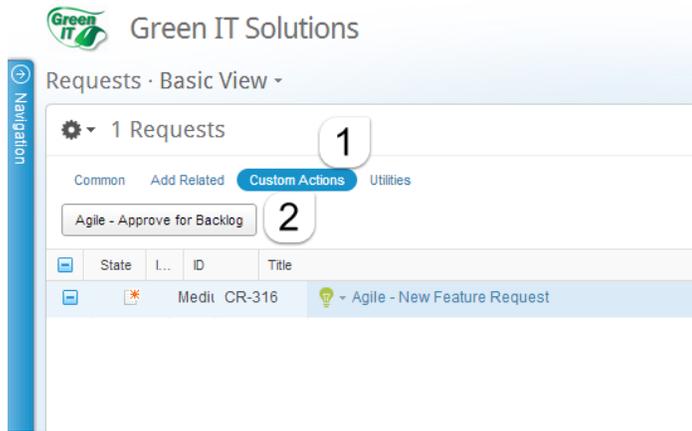

6. In the approval dialog box, choose the backlog work item.
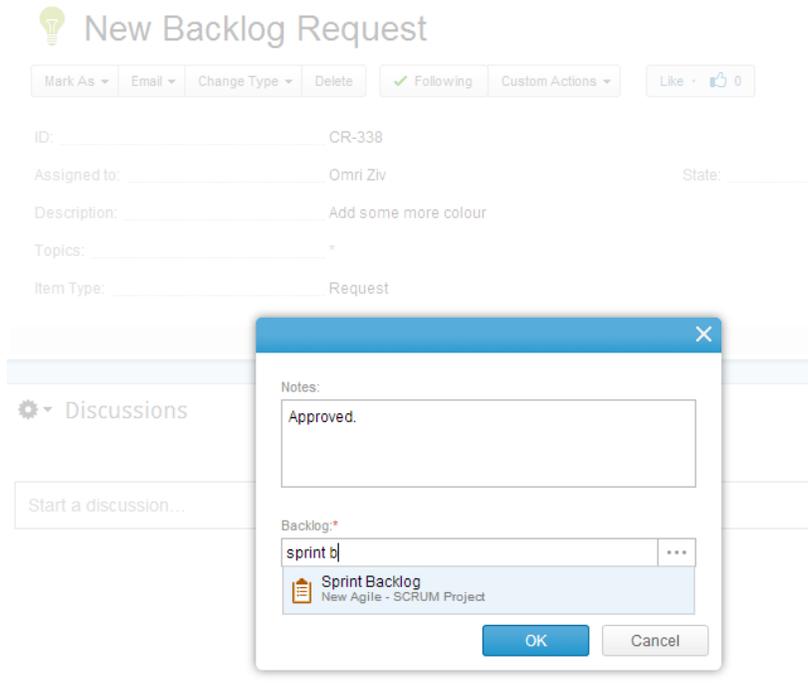
7. Now you can see the new request under the Sprint Backlog.
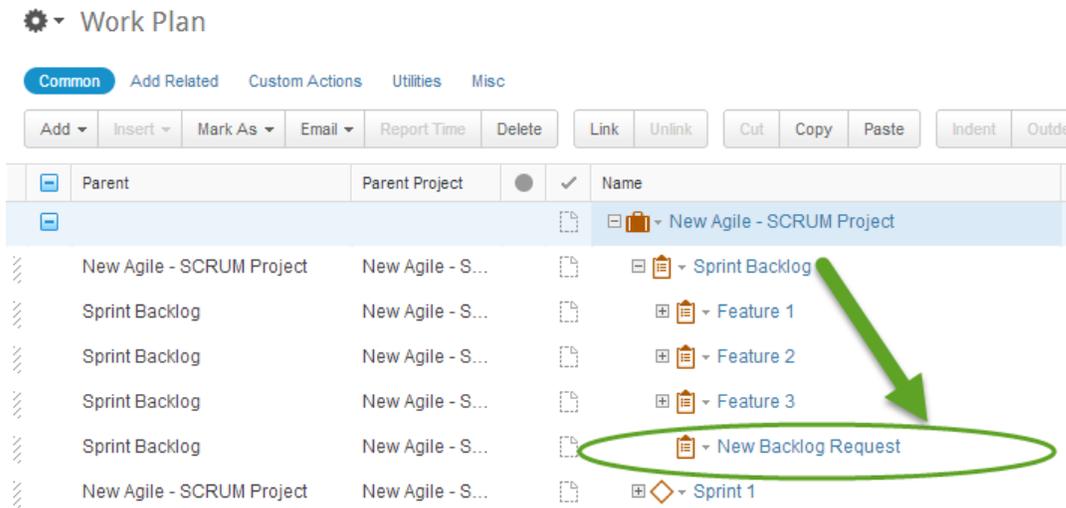
8. It is recommended to create an Request Backlog view for managing the project effort estimation. With the RBL view, it is easy to understand the effort estimation for all the tasks and feature requests :
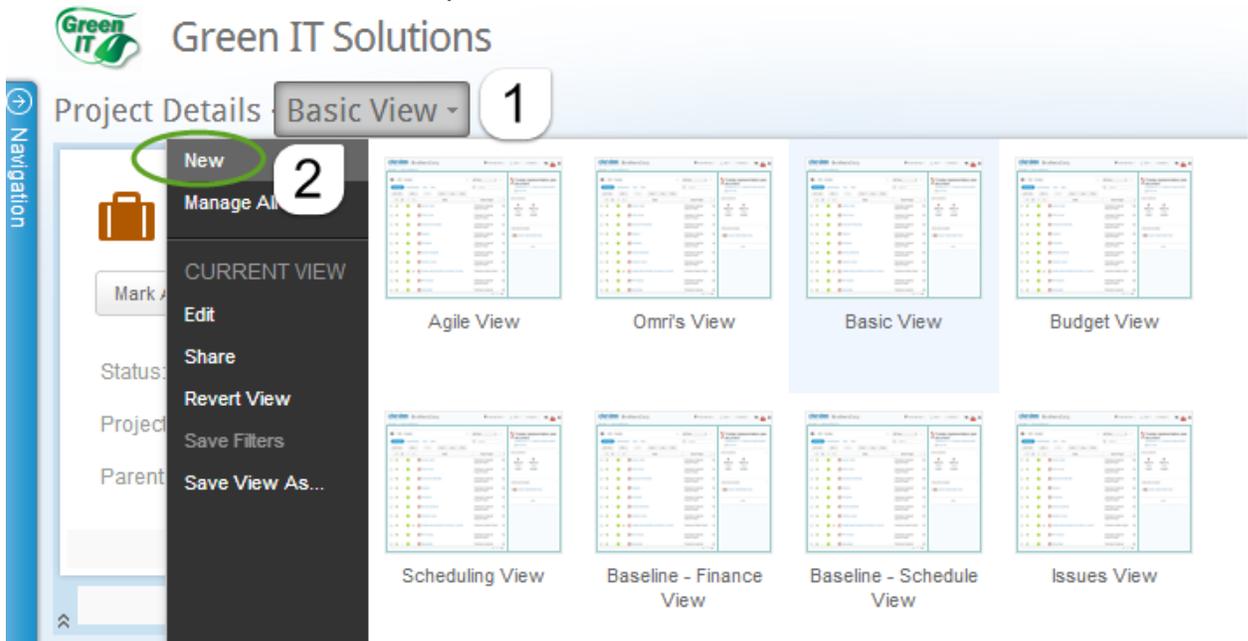
8.1. In the edit menu, enter a new name for the view. After adding the name, click on the "Manage" button to add the EE (Effort Estimation) custom fields to the view.
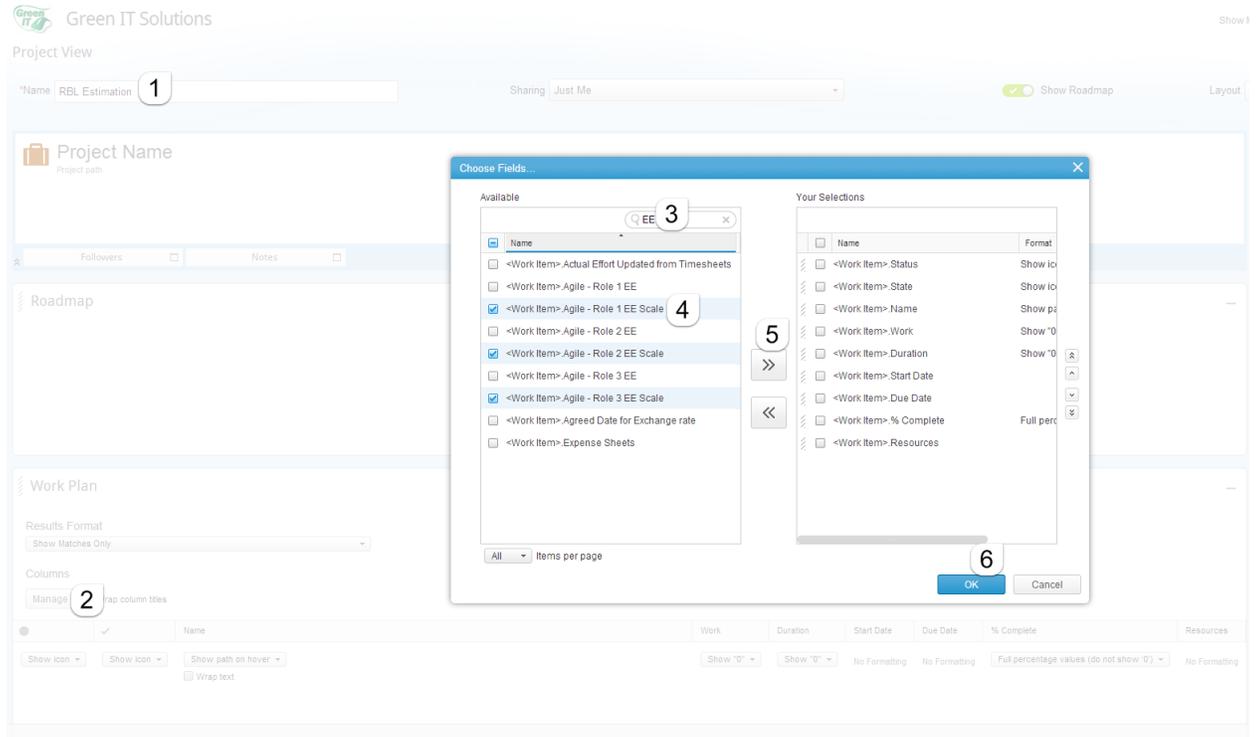
8.2. Now you should be able to see the RBL fields in the work plan panel
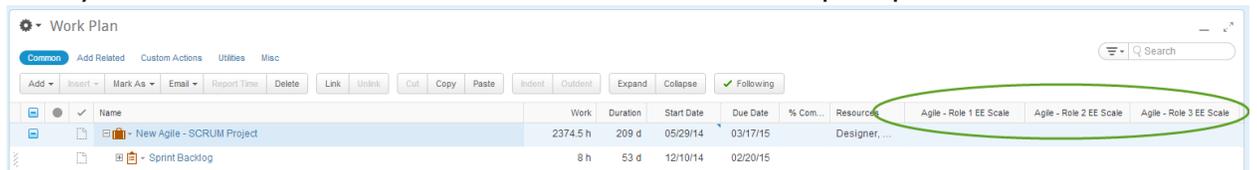
8.3. After creating the RBL view, create an additional view with the name " RBL #".
This view will show a numeric estimation of the effort. Use the fields marked in green when creating the view:

Name	Work	Duration	Start Date	Due Date	% Complete	Resources	Agile - Role 1 EE	Agile - Role 2 EE	Agile - Role 3 EE
⊟ New Agile - SCRUM Project	2374.5 h	209 d	05/29/14	03/17/15		Designer, Developer, Front...	75	75	13.5
⊟ Sprint Backlog	8 h	53 d	12/10/14	02/20/15			25	25	4.5
Agile Request Testing P	8 h	1 d	12/10/14	12/10/14					
New Backlog Request	54.5 h	1 d	01/29/15	01/29/15			25	25	4.5
⊞ Feature 1	0 d	48 d	12/10/14	02/13/15			0	0	0
⊞ Feature 2	0 d	23 d	12/26/14	01/27/15			0	0	0
⊞ Feature 3	0 d	47 d	12/18/14	02/20/15			0	0	0
Feature Requets 9999	8 h	1 d	12/10/14	12/10/14					
⊞ Sprint 1	696 h	18 d	12/10/14	01/02/15			0	0	0
⊞ Delivery readiness	0 h	68 d	12/10/14	03/13/15			25	25	4.5
⊞ Sprint 2	688 h	18 d	01/05/15	01/28/15			0	0	0

9. To move the request from the backlog to a sprint, you can click on the "Agile – Assign to iteration" custom action.

10. In the dialog box, choose the Sprint task under which you want to move the task.
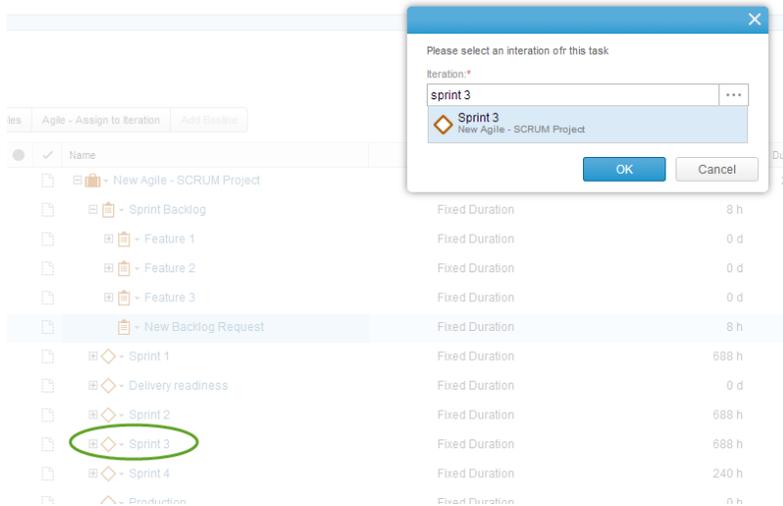
11. You can notice that the task was moved under Sprint 3. In the same time a shortcut was created under the Backlog.
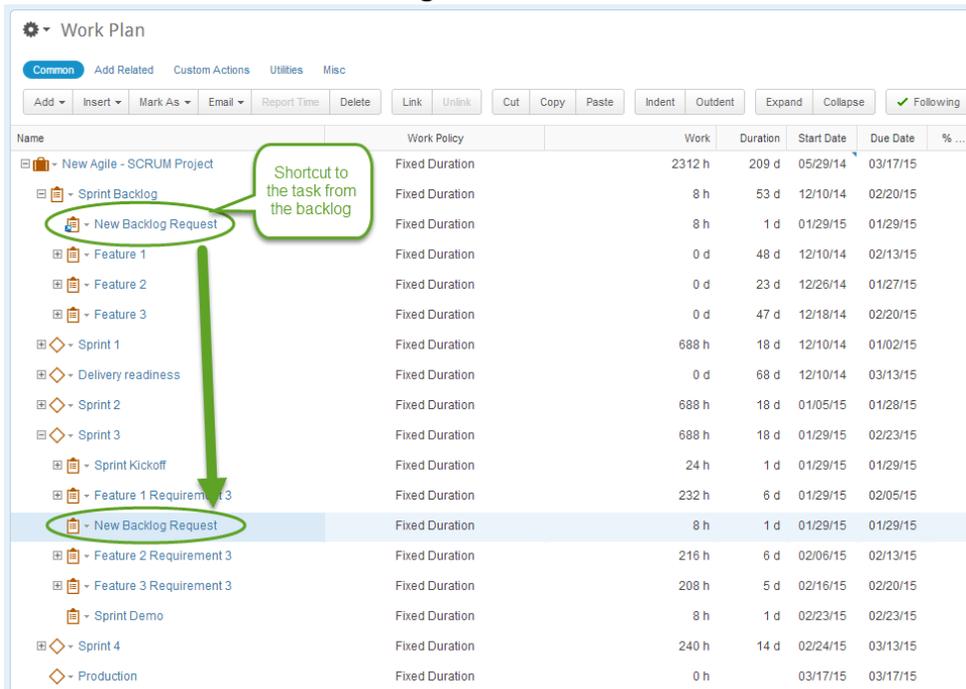
Most organizations have a development history they can leverage in order to accurately set release dates. Use that history to calculate your T-shirt estimations (small, medium, large, extra-large and so on) for the items in your release backlog. What does that mean? Some features are small, requiring just a few development days; extra-large features may take weeks to deliver. Begin by establishing how your organization defines small, medium and large projects. For instance:
Once you have established your T-shirt estimations, review and apply an appropriate estimation to every requirement contained in your release Backlog.

12. After adding a few tasks to the sprints, you can start estimating the effort for each role by choosing the "T-Shirt size" for each role column.

13. Once the effort estimation has been completed, the task can be split to the different roles for individual management and reporting.

14. In the Roles dialog box you can choose the resources\virtual user for each role.

15. After clicking OK, the original has become a hammock, and each new task has its own allocated resource.

Name	Work	Duration	Start Date	Due D...	% Com...	Resources	Agile - Moved From RBL	Agile - Role 1 EE	Agile - Role 1 EE Scale	Agile - Role 2 EE	Agile - Role 2 EE Scale	Agile - Role 3 EE	Agile - Role 3 EE Scale
⊟ 💼 - New Agile - SCRUM Project	2358.5 h	209 d	05/29/14	03/17/15		Omri Ziv...		75		75		13.5	
⊞ 🗐 - Sprint Backlog	54.5 h	192 d	05/29/14	02/20/15				25		25		4.5	
⊞ ◇ - Sprint 1	688 h	18 d	12/10/14	01/02/15				0		0		0	
⊞ ◇ - Delivery readiness	0 h	68 d	12/10/14	03/13/15				25		25		4.5	
⊞ ◇ - Sprint 2	688 h	18 d	01/05/15	01/28/15				0		0		0	
⊟ ◇ - Sprint 3	1124 h	18 d	01/29/15	02/23/15				25		25		4.5	
⊞ 🗐 - Sprint Kickoff	24 h	1 d	01/29/15	01/29/15				0		0		0	
⊞ 🗐 - Feature 1 Requirement 3	232 h	6 d	01/29/15	02/05/15				0		0		0	
⊟ 🗐 - New Backlog Request	54.5 h	1 d	05/29/14	05/29/14				25	XXL (above 25)	25	XXL (above 25)	4.5	S (3-5)
🗐 - New Backlog Request - Developer	25 h	1 d	05/29/14	05/29/14		Developer		25					
🗐 - New Backlog Request - Designer	25 h	1 d	05/29/14	05/29/14		Designer				25			
🗐 - New Backlog Request - Frontend Developer	4.5 h	1 d	05/29/14	05/29/14		Frontend...						4.5	
⊞ 🗐 - Feature 2 Requirement 3	216 h	6 d	02/06/15	02/13/15				0		0		0	
⊞ 🗐 - Feature 3 Requirement 3	208 h	5 d	02/16/15	02/20/15				0		0		0	
🗐 - Sprint Demo	8 h	1 d	02/23/15	02/23/15									
⊞ ◇ - Sprint 4	240 h	14 d	02/24/15	03/13/15				0		0		0	
◇ - Production	0 h	0 h	03/17/15	03/17/15									
🗐 <Add task>							🔒						

16. In addition to the standard grid view, you can also install the Team Board app To update the status of the work, you can the Team Board view:

Project Details · RBL Estimation ▾

💼 New Agile - SCRUM Project

| Mark As ▾ | Email ▾ | Delete | Gantt View | Team Board | ✓ Following | Custom Actions ▾ |

Status: .... Not Active   State: .....

Project Manager: .... Omri Ziv   % Comp

Parent: .... ✱   Parent P

17. In the Team Board view you can have a quick glance into each task status:
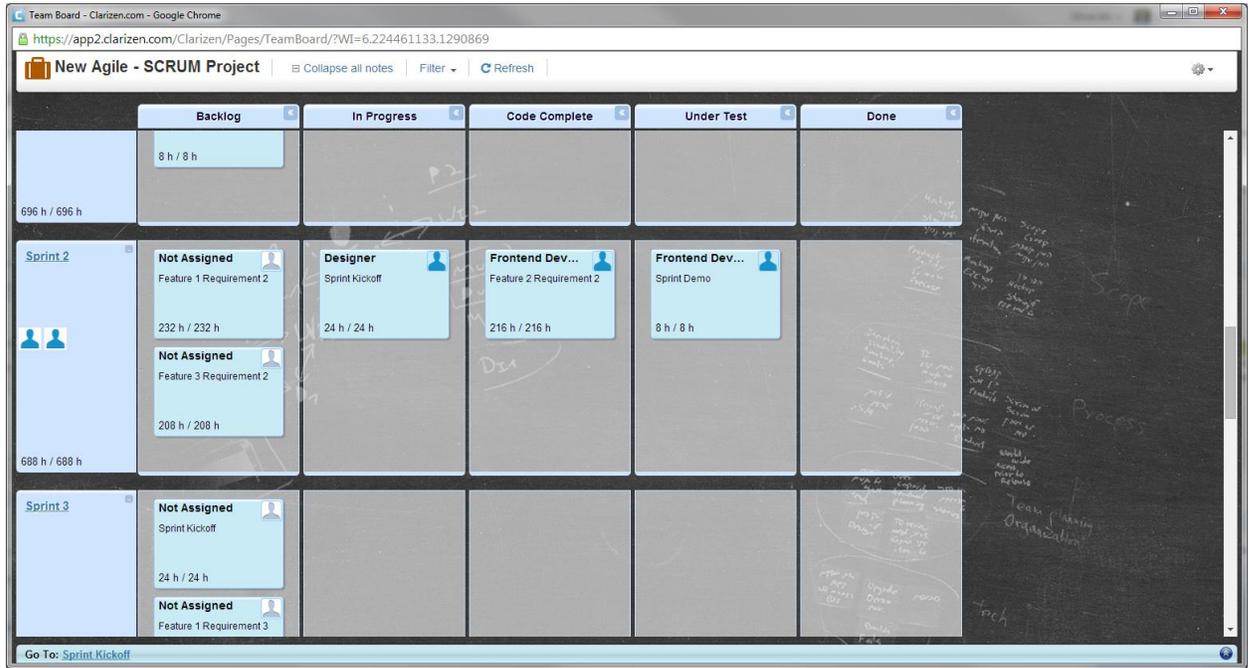
18. The Teamboard display can be customized through the Settings menu: