

IBM Innovate 2010

Using Rational Team Concert for Agility@Scale



Innovate2010

The Rational Software Conference

Let's **build** a smarter planet.

The premiere software and product delivery event.



Agenda

- **Agile Planning Introduction**
- A Scrum Planning Episode
- Scale my Project
- How we use Agile Planning for Developing RTC
- RTC Q4.10 Outlook



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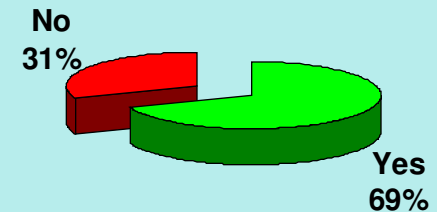


What is Agile

An iterative and incremental (evolutionary) approach performed in a highly collaborative manner with just the right amount of ceremony to produce high quality software in a cost effective and timely manner which meets the changing needs of its stakeholders.

So Agile is not a method. Its more like a conceptual framework (abstract class) with concrete implementations like, Eclipse Way, OpenUp, Scrum....

Have you adopted any Agile techniques?



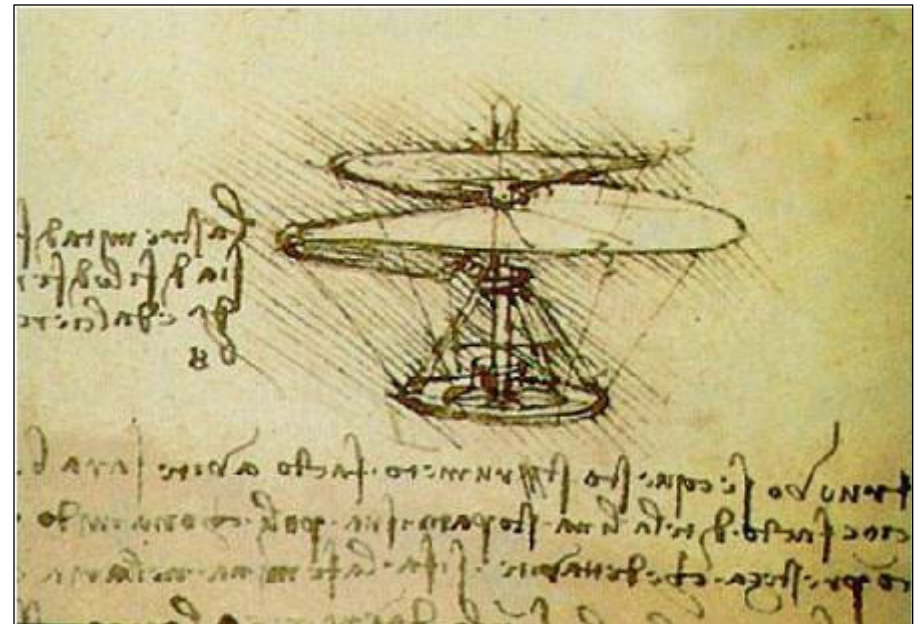
Source: Ambler 'Agile Adoption Rate' & 'Project Success' surveys - www.ambyssoft.com/surveys/



Agile is Not

- Low ceremony
 - ▶ It is (very) formal and has (very) specific practices
- Do what you want (cowboy coding)
 - ▶ Requires lots of discipline
- Easy to do
 - ▶ See above 😊
 - ▶ Needs cultural changes

- A silver bullet



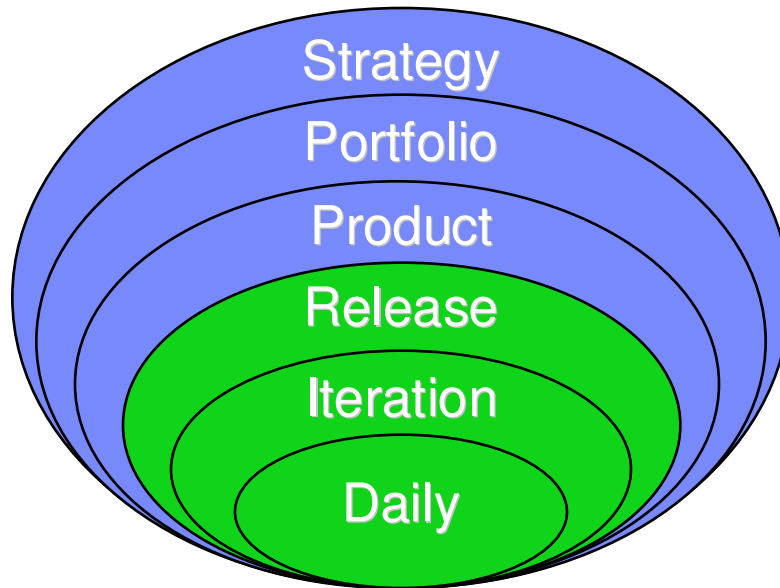
Agile Methods

There are several Agile Methods available, however from a bird's eye view they share a common set of tooling relevant properties:

- Short development cycles (1 – 6 weeks)
- Self organizing development teams
 - ▶ Joint planning meetings
 - ▶ Stand-up meetings
- High personal responsibility of team members
 - ▶ Developers “manage” their work
 - ▶ Developers / Teams estimate
- Progress tracking
- Ongoing customer involvement
- Retrospectives
- Use of historical data to improve planning



The Planning Onion*



Agile team plans at the innermost three levels

RTC offers support for all these levels plus support for a product wide backlog

(*) Mike Cohn, Agile Estimating and Planning



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Team Concert's Agile Planning Support

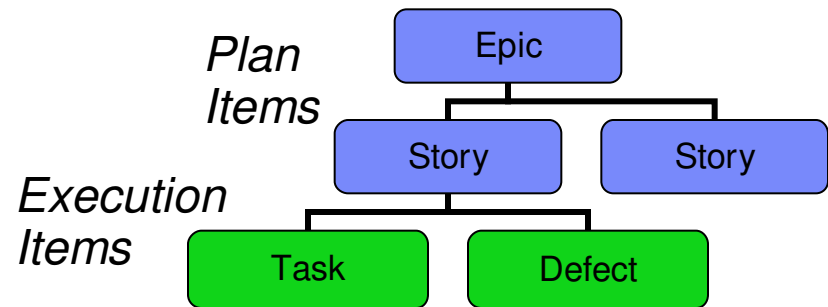
- Team Concert's Agile Planning support has the following key characteristics:
- Process neutral (works with Scrum, OpenUp ...), but assumes
 - ▶ short (1 – 6 weeks) development cycles
 - ▶ supports two level planning: release, iteration
 - ▶ supports monitoring releases, iterations
- No separation between planning/implementing of features and bug fixing
 - ▶ Both planning and defect management share a common data model
 - ▶ They are supported in the same tool and are highly integrated
 - ▶ Plans are in fact a query for work items
- Supports:
 - ▶ Top down planning (product owner, team lead, ...) **AND**
 - ▶ Bottom Up (team members) **AND**
 - ▶ Plan consolidation (Sprint planning meetings, stand-ups, ...)



Plan and Execution items

- Work items have two flavors:
 - ▶ Execution Items: work items which have work assigned. In Scrum these are task, defects, ...
 - ▶ Plan Items: work items that are relevant for the planning. In Scrum these are Epics and Stories

- RTC allows to customize which work item types are plan items and which types are execution items.



Configuration

- Roles
- Project Configuration
 - Project Area Initialization
 - Permissions
 - Operation Behavior (unconfigured)
 - Event Handling (unconfigured)
 - Configuration Data
 - Dashboards
 - Planning
 - Plan Attributes
 - Plan Items (unconfigured)
 - Plan Mode Elements (unconfigured)
 - Plan Modes (unconfigured)
 - Plan Scripts (unconfigured)
 - Plan Types
 - Top-Level Work Item Type**
 - Work Environment
 - Work Item Progress Mode
 - Work Items
 - Work Items (advanced)
 - Team Configuration

Top-Level Work Item Types

This configuration option allows you to specify which work item types are plan items and which are execution items.

Top-Level Plan Item Types:

- Adoption Item
- Defect
- Epic
- Impediment
- Retrospective
- Story
- Task
- Track Build Item



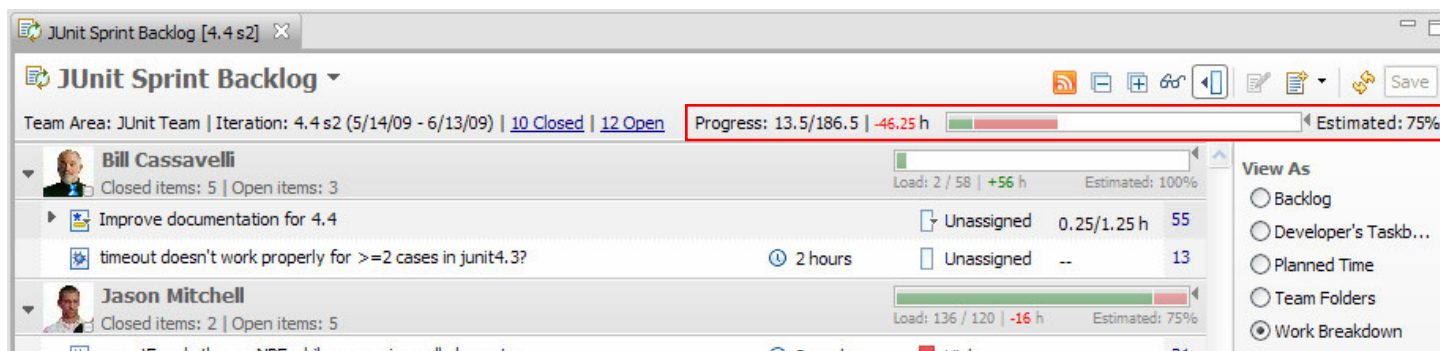
Background: Estimation and Sizing

- Agile planning separates **estimating the size** from **estimating the effort**
- The **size** is often estimated in relative values. Scrum uses **Story Points**
- The **effort** is typically estimated in **Ideal Hours/Days**
- **Velocity** measures a teams rate of progress
 - ▶ Completing 2 Stories of 5 story points in one iteration gives a velocity of 10
 - ▶ Good guess is to assume the same velocity for the next iteration
 - ▶ team velocity is what matters

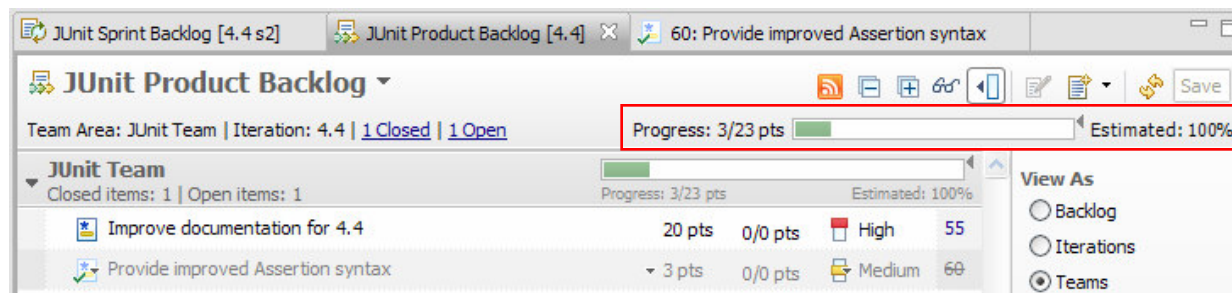


Estimation and Sizing in RTC

- Effort: Execution items are estimated in ideal hours.



- Size: Plan items are estimated using a configurable numerical sizing attribute
 - ▶ Scrum uses Story points. Other sizing attributes could be: lines of code, function points, ...



Plan Risk Assessment

Task Description	Risk Level	Duration	Priority	Value	ID	
Link for enhanced hovers in Work Item web	High	2 hours	1.0	71777		
Area' functionality on the service layer	High	3 days	1.0	77086		
of namespaces, no prefix and media	High	2 hours	1.0	77921		
...-0548);	High	2 days	1.0	76899		
...client-tests.URServiceTest.testCommentU	High	2 hours	1.0	54771		
...for this custom attributes at the same time	High	2 hours	1.0	76854		
Include the ... of each attribute in the ResultRowDTO	High	2 hours	1.0	77291		
workflowInfo on Resource ... is not updated on project area	Medium	2 hours	1.0	6997		
Align ROA collection with OSJC's Atom ... and RDF Bags	Medium	2 days	1.0	70731		
Consider to surface links as attributes in the Resource	High	4 hours	3 days	1.0	73224	
workItem REST API shall also expose the 'Included in bulk'	High	1 day	2 days	0.995		
Preserve Mentioned By links when their target is protected	Medium	2 hours	0.994	69897		
OSJC REST cleanup	High	1 hour	3 days	0.749	77322	
Check enforcement of permissions for Web UI bulk operation	Medium	4 hours	1 day	0.629	77096	
Consider to request Query Designer migration problem	Medium	1 hour	0.605	68972		
PUT/POST	Medium	4 hours	0.490	61246		
... work item in the	Unassigned	4 hours	0.109	61247		
page returned to the Web UI	Medium	2 hours	2 hours	4 hour	0.083	74890
...test search was scoped by	Unassigned	4 hours	0.057	74767		

More detailed developer estimation.. low, nominal, high

calculates probability of task fitting into the schedule

Color codes high risk tasks for quick identification and action

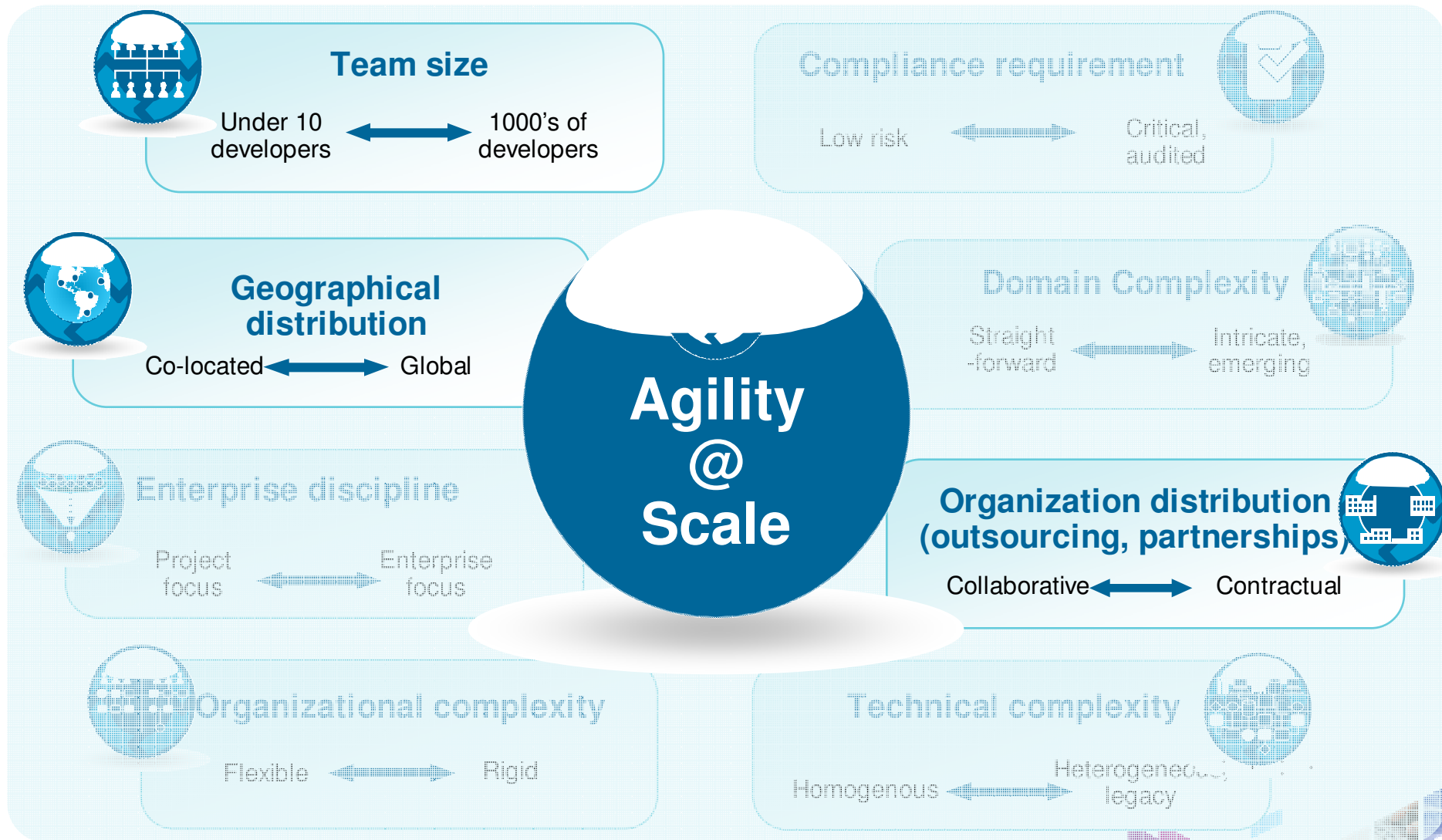


Agenda

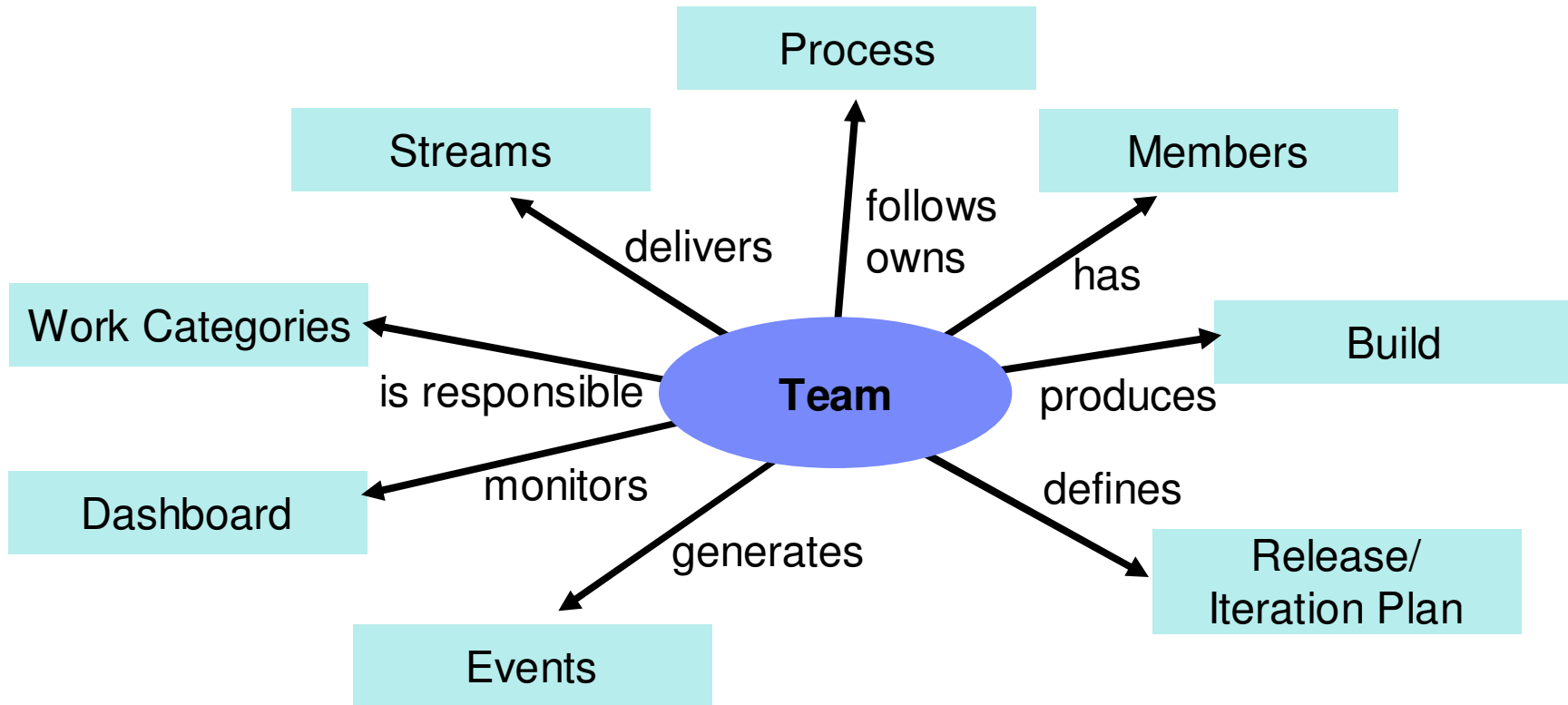
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Scaling Factors



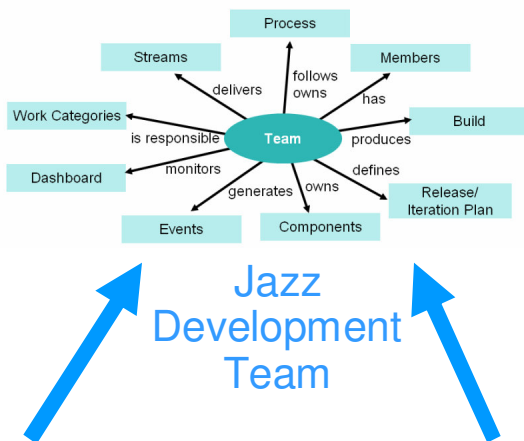
Way of Working: Team Centric



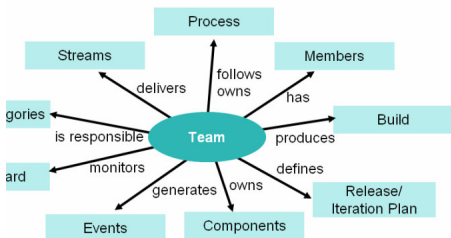
Teams are self-tuned but share a common rhythm



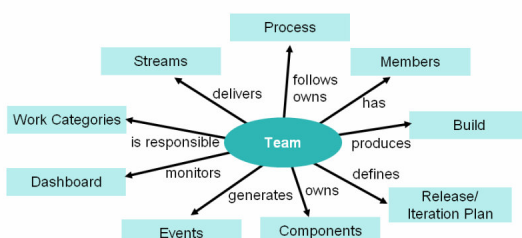
Scaling up: Teams of Teams



Jazz Development Team



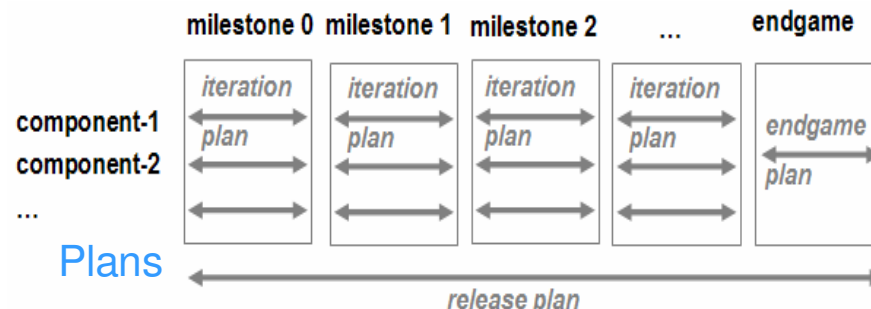
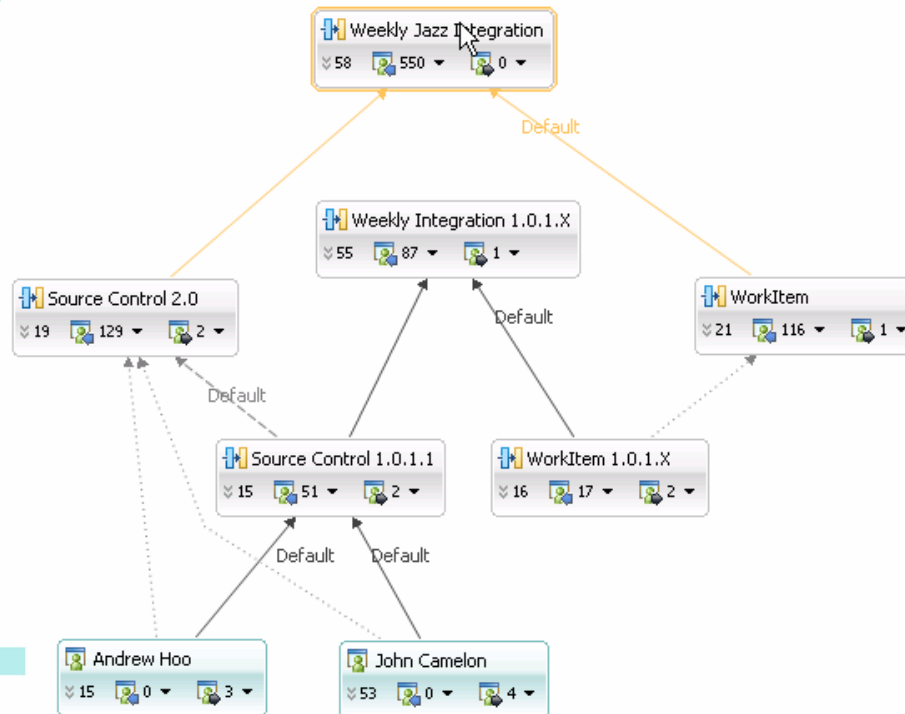
Process Team



Repository Team

- Sandboxes for each team with “Integration points”:
 - ▶ Integration stream
 - ▶ Integration build
 - ▶ Release plan

Changes



Collaboration

- Collaborate on software artifacts
 - ▶ Changes, defects, tasks, plans, builds
 - ▶ Approvals
 - Collaborate in context
 - ▶ Artifact relationships/links
 - Collaborations follow **rules** and **patterns**
 - ▶ **Artifacts** are in the center
- ⇒ **Process**



Transparency

- Easy access to the projects artifacts from anywhere
 - ▶ Plans
 - ▶ Build results
 - ▶ Dashboards
- Notification about changes in the project
 - ▶ Event feeds
 - ▶ Change histories
- See where the project is
 - ▶ “Knowing what is going on without having to ask”
- Transparency in process
 - ▶ Team structure, team roles



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Our Artifacts

- Plans

- ▶ Product Backlog
- ▶ Release Plan
- ▶ Iteration Plan

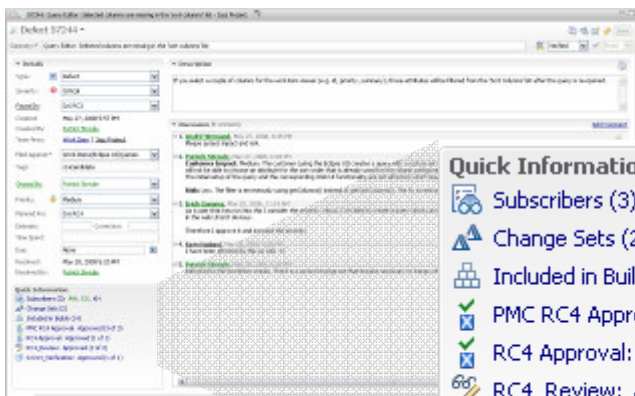
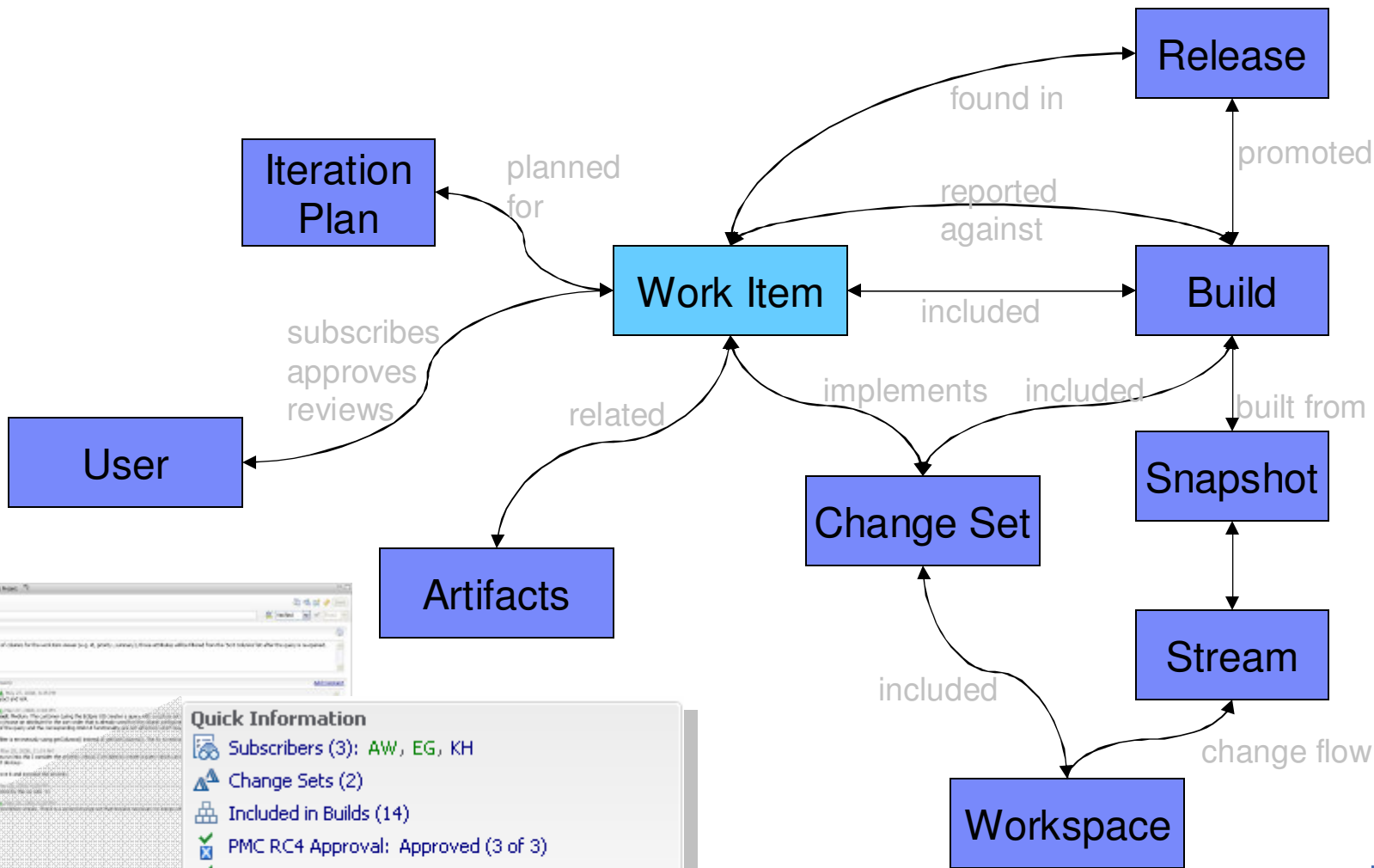
- Items

- ▶ Plan items, Stories, Tasks
- ▶ Tracking
 - Build status
 - Adoptions
- ▶ Defects
- ▶ Enhancement
- ▶ Retrospectives

-  Defect
-  Task
-  Enhancement
-  RFS
-  Plan Item
-  Track Build Item
-  Retrospective
-  Story
-  Adoption Item



Artifact Relationships



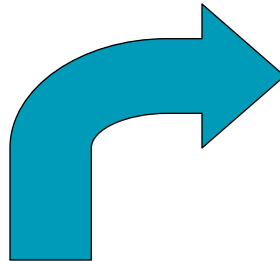
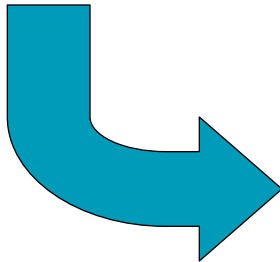
Quick Information

- Subscribers (3): **AW**, **EG**, **KH**
- Change Sets (2)
- Included in Builds (14)
- PMC RC4 Approval: Approved (3 of 3)
- RC4 Approval: Approved (1 of 1)
- RC4_Review: Approved (2 of 2)
- 0.6rc4_Verification: Approved (1 of 1)



Plan Input

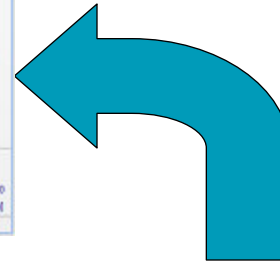
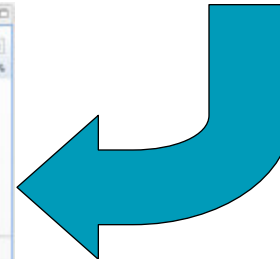
Community Stakeholders



Defect Backlog

The screenshot shows the 'Team Concert 3.0' interface. At the top, it displays 'Owner: RTC Development | Iteration: 3.0 (28/08/09 - 10/09/10) | 152 Closed | 322 Open'. Below this, a progress bar indicates 'Progress: 486/4854 pts' and 'Estimated: 180%'. The main area is a table of tasks with columns for description, category, points, progress, priority, and ID. The right sidebar includes 'View As' options (Backlog by Themes, Backlogs, Ranked List, Teams, Themes, More), 'Actions' (Re-sort), and an 'Exclude' section with checkboxes for various item types like Assigned Items, Empty Groups, Estimated Items, Execution Items, Items from Sub-Backlogs, Items from Sub-Teams, Planned Items, Rejected Items, and Unchanged Items. A 'Related Plans' section at the bottom right lists 'Team Concert Developer (3.0)' and 'RTC Uncommitted (Backlog)'.

PMC



Team



Plan Input - continued

- **PMC**

- ▶ Requirements (release plan): *traceability*, ...
- ▶ Themes: *improve performance*, ...
- ▶ Concrete tasks: *externalize strings*

- **Community / Stakeholders**

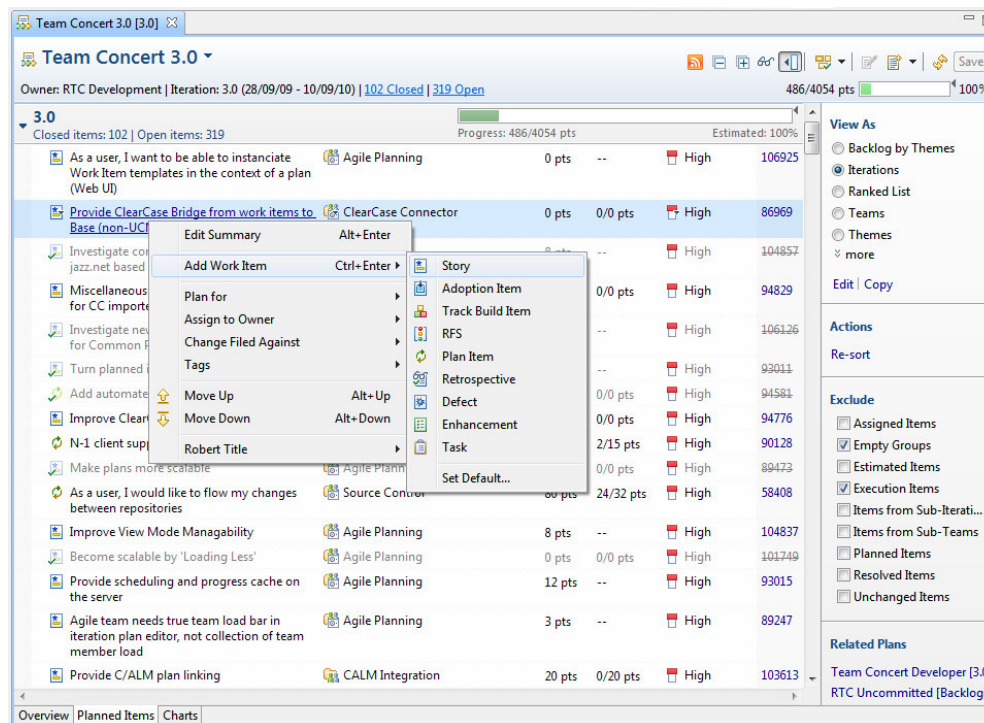
- ▶ Requirements
- ▶ Enhancements
- ▶ Defect reports

- **Team**

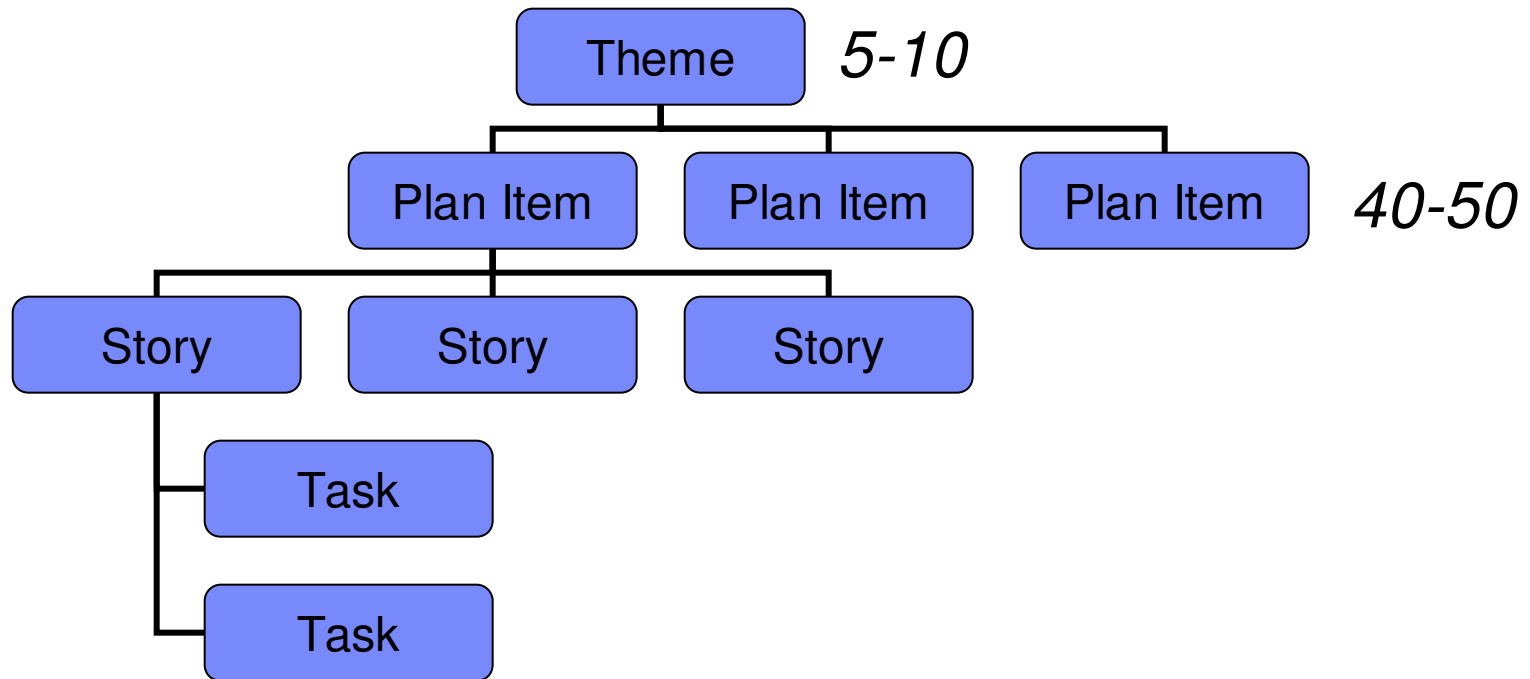
- ▶ Architectural issues
- ▶ Redesigns
- ▶ Product ideas

- **Defect Backlog**

- ▶ Previous test passes
- ▶ Self hosting



Our Plan Structure



Product Planning

- Creates a high-level plan that contains stories not planned for any release/iteration yet
 - ▶ a prioritized backlog of sized plan items (e.g. stories)
 - ▶ created by the product manager
- Update with regular frequency



Release Planning

- Create a high-level plan that covers more than one iteration
 - ▶ a prioritized backlog of sized stories & plan items organized in themes
 - ▶ created by the team lead / product manager
 - ▶ has a release date
- Define the iterations/iteration length
- Updated with regular frequency



Plan Item

- Custom Attributes

- ▶ Complexity
- ▶ Development status:
 - on track
 - at risk
 - behind
- ▶ Done criteria

- Workflow

- Proposed
- Committed
- Done

The screenshot shows a web interface for a 'Plan Item' titled 'Improve Scrum support'. The page is divided into several sections:

- Summary:** 'Improve Scrum support', status 'Closed', and 'Implemented'.
- Details:**
 - Type: Plan Item
 - Progress: 3/3 h, Estimated: 100%
 - Team Area: RTC Development / Ra...
 - Filed Against: PMC
 - Tags: (empty)
 - Dev Status: On Track (highlighted with a red box)
 - Theme: Team First
 - Priority: High
 - Base Content: Base Content
 - DCP Boca: (empty)
 - Crossteam: (checked)
 - Complexity: Significant (highlighted with a red box)
 - Owned By: Erich Gamma
 - Planned For: 2.0 RC1
 - Resolution Date: May 16, 2009 11:55 AM
 - Resolved By: Erich Gamma
- Quick Information:**
 - Subscribers (19): AM, BB, BG, BC, CP, DB, EG ...
 - Children (11): 63593, 64125, 64126, 64243 ...
 - Blocks (1): 66117
 - Related (1): 55875
 - Mentions (3)
- Description:** 'Improve Scrum support. We should improve Scrum-style backlog planning where items planned for a release are arranged in priority order, can be grouped by iterations, and be assigned to sprints/iterations. We should improve tracking of progress on tasks by providing a task board presentation of the work items planned in progress for an iteration. We should also add a release burndown chart. [Theme: Team First]'
- Discussion (14 comments):** A list of comments from users like Dirk Baeumer, Julian Jones, Artem Marchenko, and James Moody, dated from 2009.
- Navigation:** Overview | Links | Approvals | Done Criteria | History (the 'Done Criteria' tab is highlighted with a red box)



Backlog Grouped by Themes

Team Concert 3.0 Related Plans (3) |

Owner: RTC Development | Iteration: 3.0 (9/28/09 - 9/10/10) | 102 Closed | 319 Open

Overview | **Planned Items** | Charts

486/4054 pts 100%

View As: **Backlog by Themes**

Theme	Closed Items	Open Items	Progress
Coexistence	2	8	0/25 pts 100%
Easy to Setup & Maintain	0	12	0/139 pts 100%
Easy to Use	7	42	9/638 pts 100%
Enterprise Scalable & Secure	9	21	5/347 pts 100%
Governance	2	6	0/99 pts 100%
Jazz Product Family	5	18	42/381 pts 100%
Modularity	0	9	0/191 pts 100%

Item	Version	Points	Est. Points	Priority	Count
Provide ClearCase Bridge from work items to Base (non-UCM) ClearCase	3.0	0 pts	0/0 pts	High	86969
Auto-associate ClearCase versions to the current work item	3.0	0 pts	0/0 pts	High	99286
Auto-associate ClearCase versions to the current work item – 3.0 M4 timebox	3.0 M4	0 pts	--	High	103788
Develop new ETLs for RTC artifacts	3.0 M6	8 pts	--	High	108746
Bundle Eclipse 3.5.2 (and support Eclipse 3.6) for RTC 3.0	3.0 M5	0 pts	--	Medium	104367
Import and Export from MS Project	3.0	8 pts	--	Medium	26076
Support many-to-many relationship between CQ repositories and Jazz repositories via the CQ Bridge	3.0	8 pts	--	Medium	69680
View ClearQuest Chart(s) within RTC dashboard viewlet(s)	3.0	0 pts	--	Medium	76335
As a ClearQuest user, I want to automate the creation of work items for one or more selected ClearQuest requests, which saves a significant time and effort during bulk triage process.	3.0	1 pts	--	Medium	65486
Eclipse client shell-shares with RAD, RSA, ...	3.0 M6	0 pts	--	Unassigned	104983



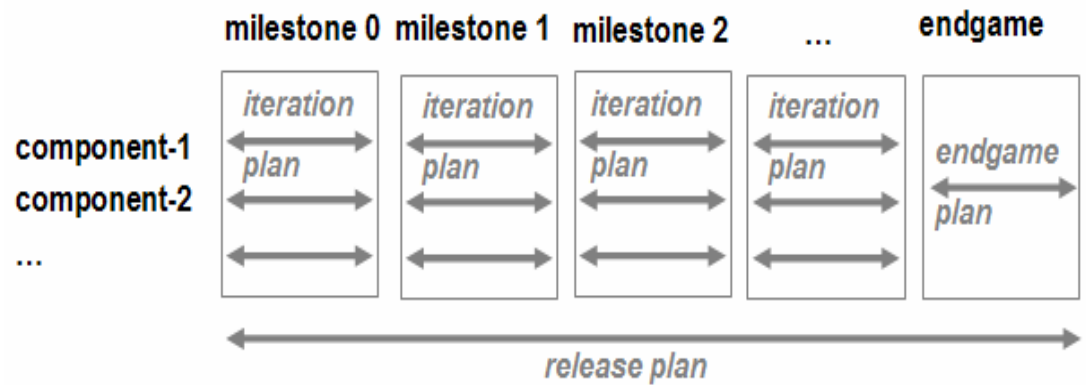
Planning and Tracking Iterations

- **Same rhythm** across teams

- **Two level planning**

- **Release plan** defines
 - ▶ rhythm
 - ▶ themes and features
 ⇒ coarse grained

- **Iteration plan**
 - ▶ per team/component
 - stories, tasks, enhancements, defects
 ⇒ fine grained



Definition of Done

- Each Plan Item has Done Criteria

The screenshot shows the 'Done Criteria' section for Plan Item 99043. The criteria are listed as follows:

- * RQM has no dependency on RTC other than through OSLC/REST APIs. This enables independent upgrading of RTC and RQM and also to provides additional deployment options
- * RQM delegates the quality tasks management to a task provider
- * Both the "integrated team" and the "functionally separated team" set-up will be provided and be supported by process templates
- * Testers have easy access to their open quality tasks and defects
- * Testers can navigate from a quality task to the corresponding quality artifact (test plan, test case)
- * Test managers have a way to manage open quality tasks across the team members
- * There is a migration for RQM 2.0 users

The 'Done Criteria' section and the 'Done Criteria' tab in the bottom navigation bar are highlighted with red boxes.



Planning/Execution: Feature Teams

- A feature team is a cross product team owning a plan item

The screenshot displays the 'Plan Item 99043' page in the Jazz Collaborative ALM system. The page is titled '*99043: Support task tracking as a service - Jazz Collaborative ALM'. The main content area is divided into several sections:

- Summary:** Support task tracking as a service
- Status:** Dev Status: Defined; Risk Status: Yellow
- Risk Description:** (Collapsible section)
- Roadmap:** Exploration Done: 2010 M4; Implementation Done: -> 2010 M6
- Team:** Feature Team Lead: André Weinand; Feature Home Page: <https://jazz.net/wiki/bin/view/Main/CALMTa>; Feature Team: A list of team members including André Weinand, April L de Vries, Craig Lawton, Erich Gamma, Jennifer Hayes, John Whitfield, Larry Smith, Patrick Streule, and Pratik Shah. There are 'Add...' and 'Remove' buttons at the bottom of the list.
- Weekly Status:** A chronological list of updates:
 - 2/22/2010:** finished exploration. Details can be found in [Story 94074](#). End of M4 we will have a list of tasks to be addressed in M5. Delegated artifact creation in RTC has been implemented (see [item 103616](#))
 - 2/27/2010:** added more details to [enhancement 75131](#)
 - 3/5/2010:** added two proposals to [story 10844](#) (see description)
 - 3/12/2010:** added more details to [story 94074](#); prepared detailed tasks for RQM team; Work Item Web UI started to run as an embedded component in an iFrame in our standalone Module Test: see [attachment 34998](#)
 - 3/19/2010:** created Wiki: <https://jazz.net/wiki/bin/view/Main/CALMTaService>; discussed detailed tasks with RQM team; implementing redirecting link clicking in embedded UI to container (see [item 108817](#)); created library for Compact Rendering support: see <https://jazz.net/wiki/bin/view/Main/CompactRenderingInRichClient> already adopted by SCM
 - 3/26/2010:** RQM has defined done criteria; embeddable Web UI implementation on track; discussion with UX and Web UI Foundation teams; investigation for [item 108424](#); we are planning to provide a patch for Foundation
 - 4/1/2010:** embeddable Web UI implementation done; can be explored in standalone Module Test web app. Waiting for RQM to consume it; discussions with UX and Web UI foundation teams; planning to base implementation on Open Social in M6; Process is willing to accept a patch for the proposal presented in [item 108424](#)
 - 4/9/2010:** RTC 3.0 M5 [endgame](#)
 - 4/15/2010:**

At the bottom of the page, there are navigation tabs: Overview, Planning, Execution, Done Criteria, Links, Approvals, History.

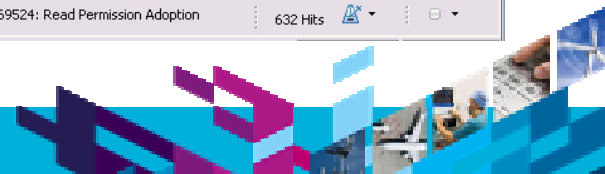
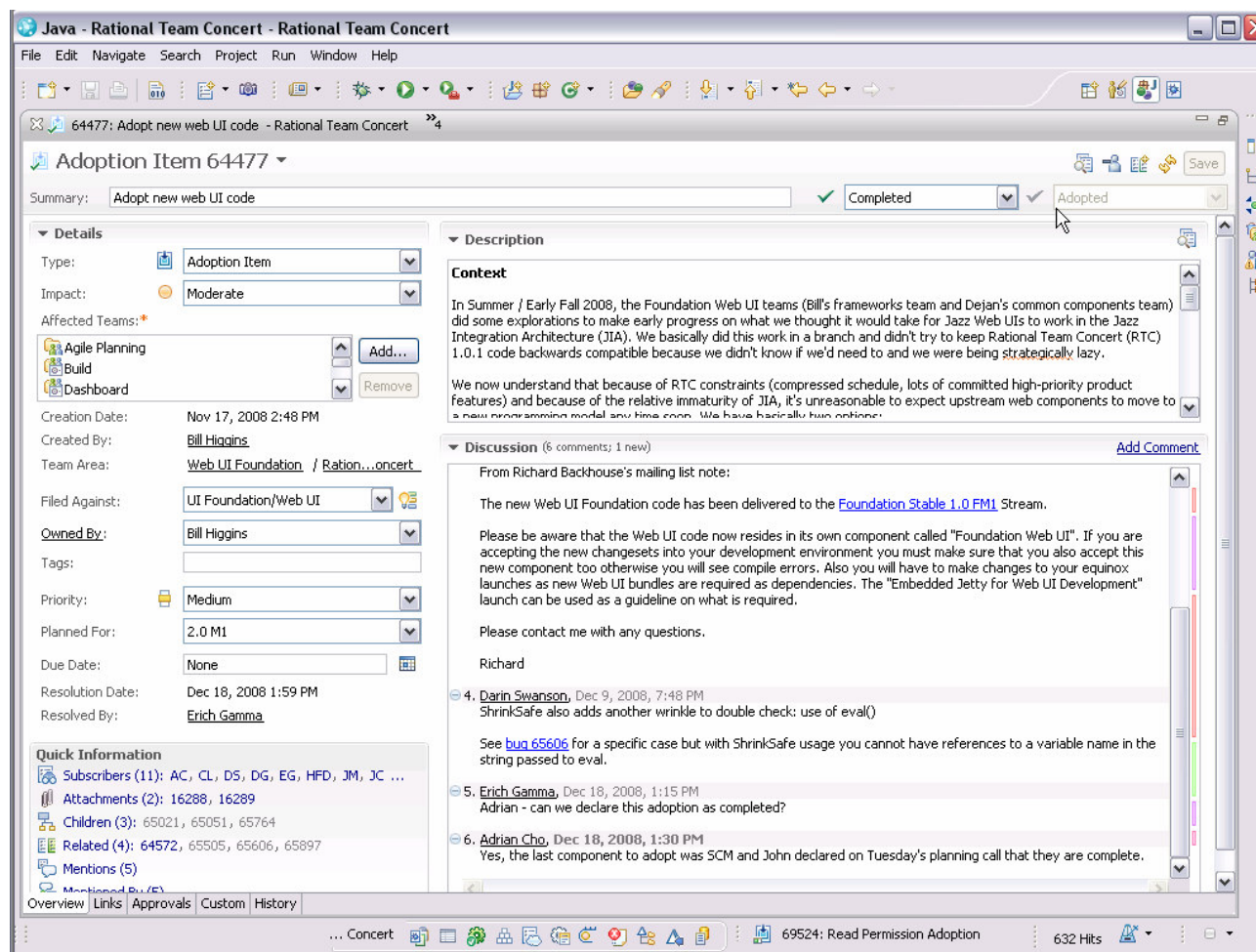
Cross Team Dependencies/Adoptions

- Adoptions:
 - ▶ Changes from lower layers that need to be adopted by other teams
 - Require approval from the project management team
 - “Lookahead planning”
 - New API delivered in M2 by team A
 - Adopted during M3 by team B, C, D
- Expectations
 - ▶ Dependencies among teams
 - Tracked using work item links



Adoption Work Item Type

- Attributes
 - ▶ Affected teams
 - ▶ Impact
- Workflow
 - ▶ Proposed
 - ▶ Approved
 - ▶ Done



More support for Agility@Scale

- RTC Build
 - ▶ personal builds
 - ▶ build snapshots
- Buildforge Integration
- Jazz SCM
 - ▶ isolation/integration using stream flow hierarchies => show our flow structure
 - ▶ private versions for code exploration
 - ▶ suspend resume for task isolation
- Dashboards
 - ▶ for transparency



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RTC Q4.10 Outlook

- Plan linking for **Collaborative Lifecycle Management (CLM)**
- Plan Snapshots
- Hybrid Planning

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CLM Integration

- Links between requirement sets, development plans and test plans
- Linking between development plans to create program / project structures
- Pickers and Hovers
- Plans records are available as REST resources

Overview | Planned Items | Charts | Snapshots | **Links**

Add: Related ▾

Contributed By				
Name	Owner	Project Area	Actions	Progress
Release Plan Mango	Mango Development	Project Mango		12/446 pts 100%

Contributed To				
Name	Owner	Project Area	Actions	Progress
Release Plan Monopoly	Monopoly Development	Project Monopoly	6/22 -11.25 h	8%
Release Plan Cranium	Cranium Development	Project Cranium	172/447.75 -181.75 h	36%

Implements	
Name	Actions
Requirement Two	
Requirement One	
Requirement Four	

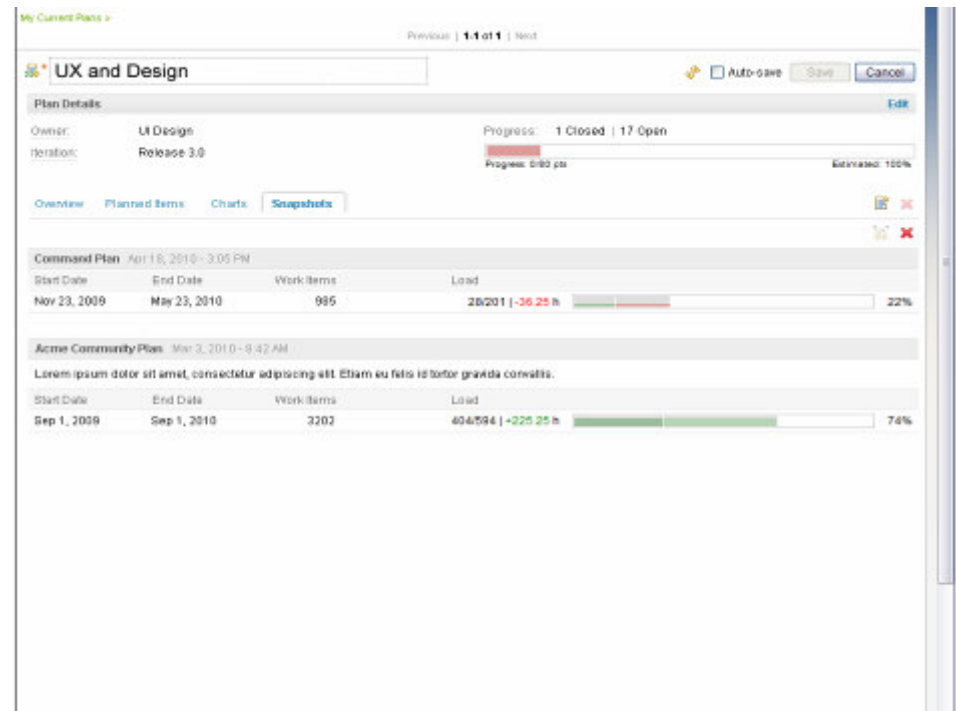
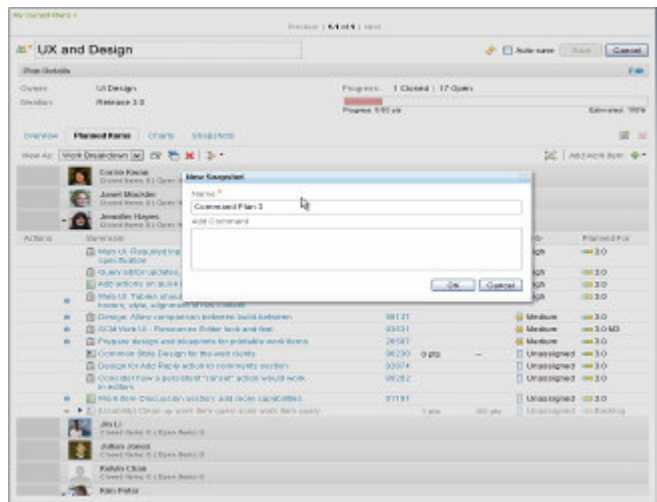
Related				
Name	Owner	Project Area	Actions	Progress
Iteration Plan Five	Five Development	Project Five	6/22 -11.25 h	8%
Iteration Plan Three	Three Development	Project Three		

Tested By			
Name	Originator	Description	Actions
Test Plan Seven	Jennifer Hayes	Test Plan Seven is looking at the effectiveness of tasks in sequence.	
Test Plan Eight	Sharon S Kuriyala	Evaluating tippets and runtime jibberish.	



Plan Snapshots

- Support to snapshot a plan containing the states of all work items, references iterations, process areas and roll-up information about effort, size and time spent.



Hybrid Planning

- Most of the RTC customers are neither 100% agile nor 100% traditional (even IBM isn't 😊)
- Goal is to support projects that mix agile and traditional concepts.
- The overall process is traditional the development execution happens agile.
 - ▶ Need for an overview Gantt – which feature is delivered in which iteration
 - ▶ Visualization of the dependencies between features
- The overall process is agile but the execution of a single iteration happens traditional
 - ▶ Need for a traditional scheduler (schedule dependencies & constraints)
 - ▶ Need for traditional resource management



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Collaborative ALM

Surf the Collaborative ALM Web

Collaborative ALM coordinates the s

Collaborative ALM Features

Configuring your C/ALM
Improve productivity and co project areas. Once establis surf the Collaborative ALM V
[Learn More >](#)

Artifact Linking and Creation
Teams collaborate by sharing information. What o making it easy for team members to find and link r changing their context. Thanks to the Jazz integra collaboration specifications, linking artifacts across
[Learn More >](#)

Tracing C/ALM Relationships
Team transparency involves knowing what everyo
Some of the most interesting questions in ALM are

Supported Product Versions

The C/ALM integrations provide the freedom to gr integrations, Rational Collaborative ALM gives you Whether it's just two teams collaborating or man' teams grow, simply add capability. No "big bang"

Which versions do I choose?

The integrations exist in each of the products, products. When you deploy any two products access to the Collaborative ALM features. Havi offer.



Questions



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