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NASHVILLE • 2022

Custom Dashboards in Rally

Your Guide:

Jeff Barschaw

Agenda

- Introduction
- Refresh on Creating View and Using Apps
- Introduction to Concepts of Dashboards
- Configuring Dashboards & Apps
- Patterns of Useful Dashboards
- Dashboard Patterns
- Examples
- Exercise: Lets create a Dashboard

Introductions

- How many of you have configured Views or Dashboards?
- Anyone care to share what they have built?
- What challenges have you experienced?

Refresh on Creating View and Using Apps

- A View is page that a user can create to highlight a specific set of data
- A View can be created in any one of the Rally Menu options
- A View is made from the Rally Application library
- The App library is made up of both of Rally's built-in capabilities and custom apps

Introduction to Concepts of Dashboards

- A Dashboard is a View with two or more Apps

- This is accomplished with different perspectives of the data

- It is best that a Dashboard have a single focus/insight
  - Data Integrity
  - A Timebox
  - Actions or Activities
  - Delivery Quality

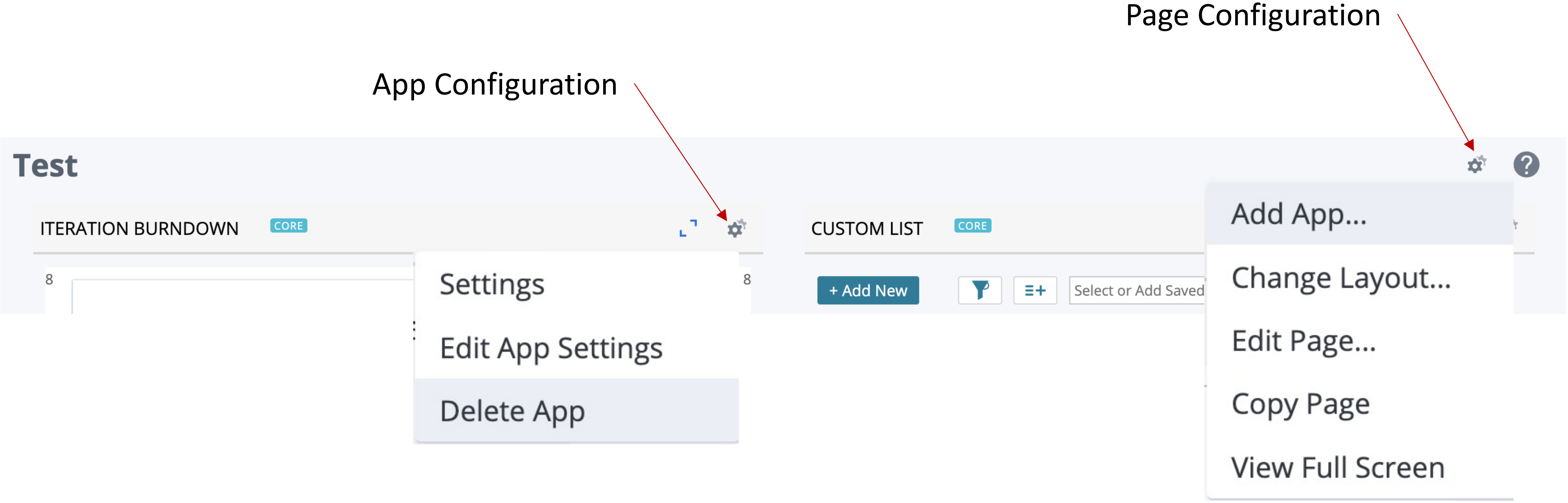
View/Dashboard Permissions

Rally Role	Views	Dashboards
Editor/Viewer	• Create, Update and Delete their own views • No Sharing	• Create, Update and Delete their own Dashboards • No Sharing
Project Admin	• Create, Update and Delete their own views • Can share with their respective Projects where they have Project Admin rights	• Create, Update and Delete their own Dashboards • Can share with their respective Projects where they have Project Admin rights
Workspace/Subscription Admin	• Create, Update and Delete their own views • Can share with the entire Workspace	• Create, Update and Delete their own Dashboards • Can share with the entire Workspace

Patterns of Useful Dashboards

- Start with Why: What focus/insight/questions is the purpose
- Most Dashboards only make sense to a few people
- Effective dashboard patterns articulate the what (focus, insight, etc.)
- Effective dashboard patterns combine Visuals with Lists
- Include links whenever possible to contributing resource that support the purpose of the dashboard e.g., link to video demonstration

Configuring View/Dashboard & Apps

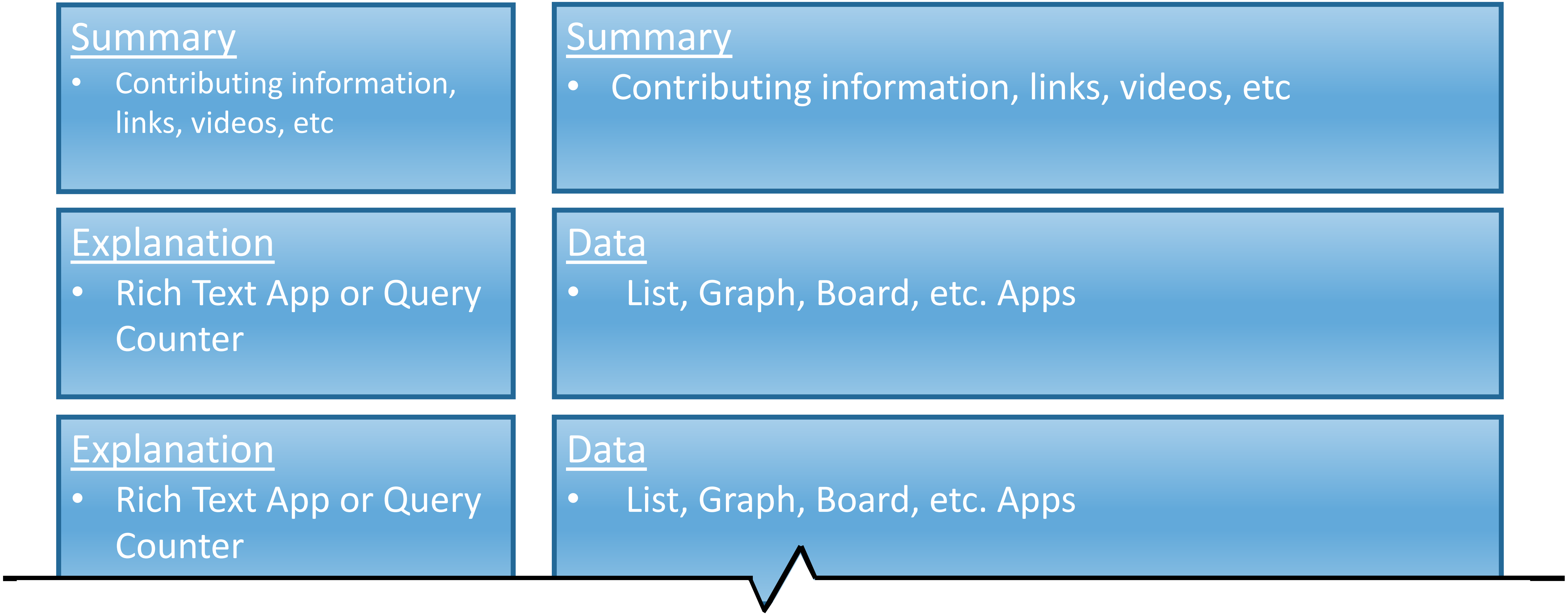


App Building Blocks

- Rich Text App – Used to provide information, links, or URLs to relevant data
- Custom List – Create a list of artifacts with one more filters and column configurations
- Query Counter – Provides a view that summarizes the the data using simple counts and math
- Custom Chart – Provides a visual represents (Pie, Bar, Column) data

Pattern #1 – Explanation/Data

- The left column provide the Explanation, the right visualizes the data



Summary

- Contributing information, links, videos, etc

Summary

- Contributing information, links, videos, etc

Explanation

- Rich Text App or Query Counter

Data

- List, Graph, Board, etc. Apps

Explanation

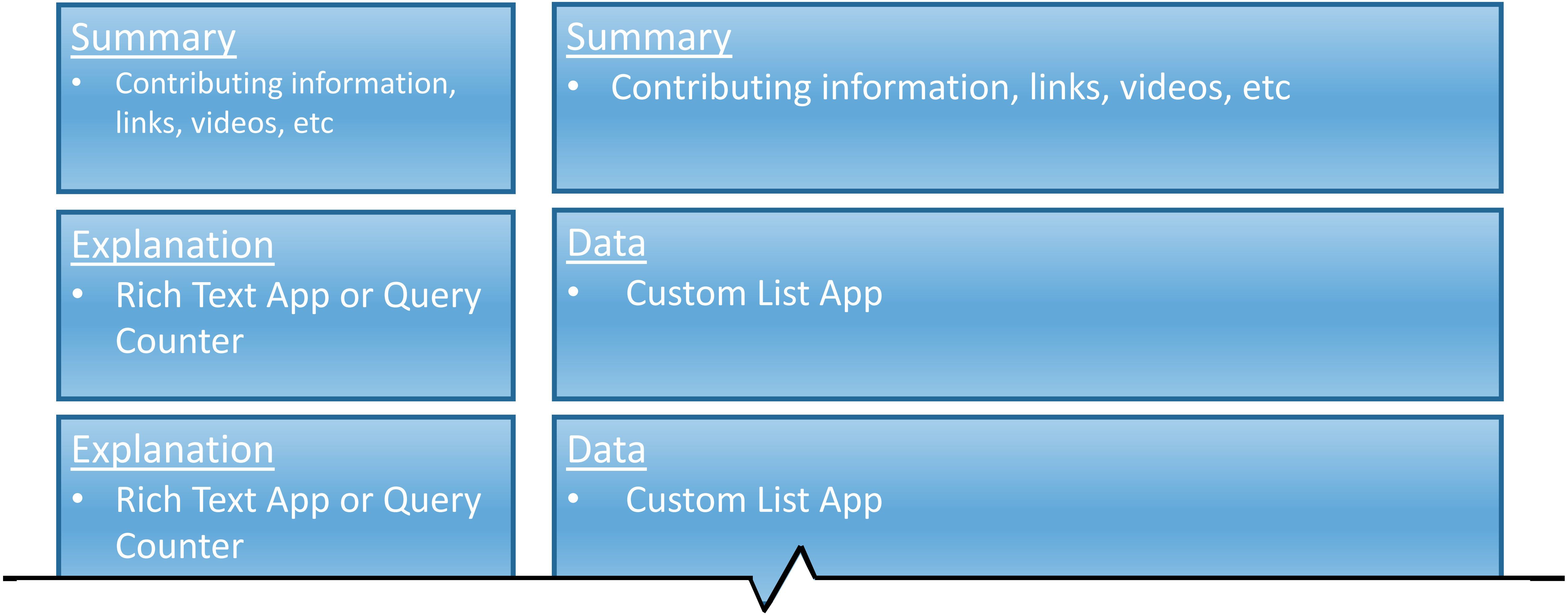
- Rich Text App or Query Counter

Data

- List, Graph, Board, etc. Apps

Pattern #2 – Instructions/Data

- The left column provide Instruction, the right has a list view with saved Filters



Summary

- Contributing information, links, videos, etc

Summary

- Contributing information, links, videos, etc

Explanation

- Rich Text App or Query Counter

Data

- Custom List App

Explanation

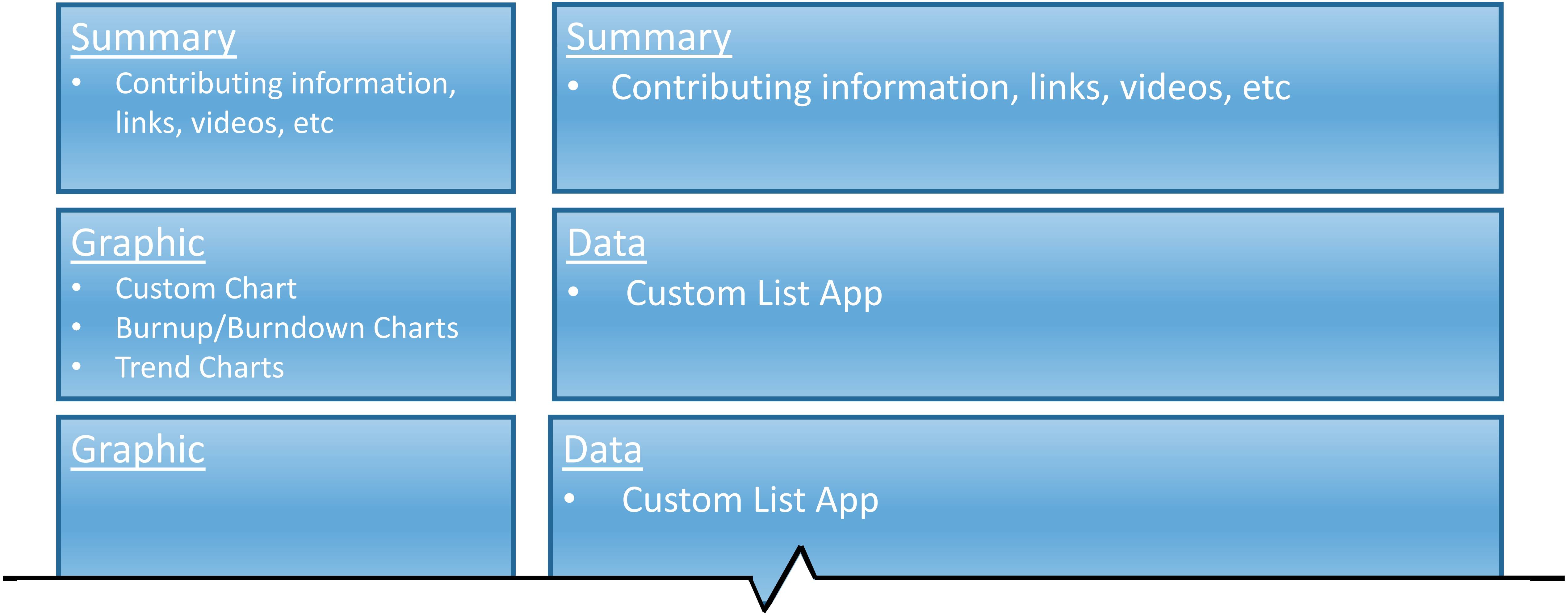
- Rich Text App or Query Counter

Data

- Custom List App

Pattern #3 – Graph/List Data

- Left column visualized the data in a graph, the right has a list view of that data



Summary

- Contributing information, links, videos, etc

Summary

- Contributing information, links, videos, etc

Graphic

- Custom Chart
- Burnup/Burndown Charts
- Trend Charts

Data

- Custom List App

Graphic

Data

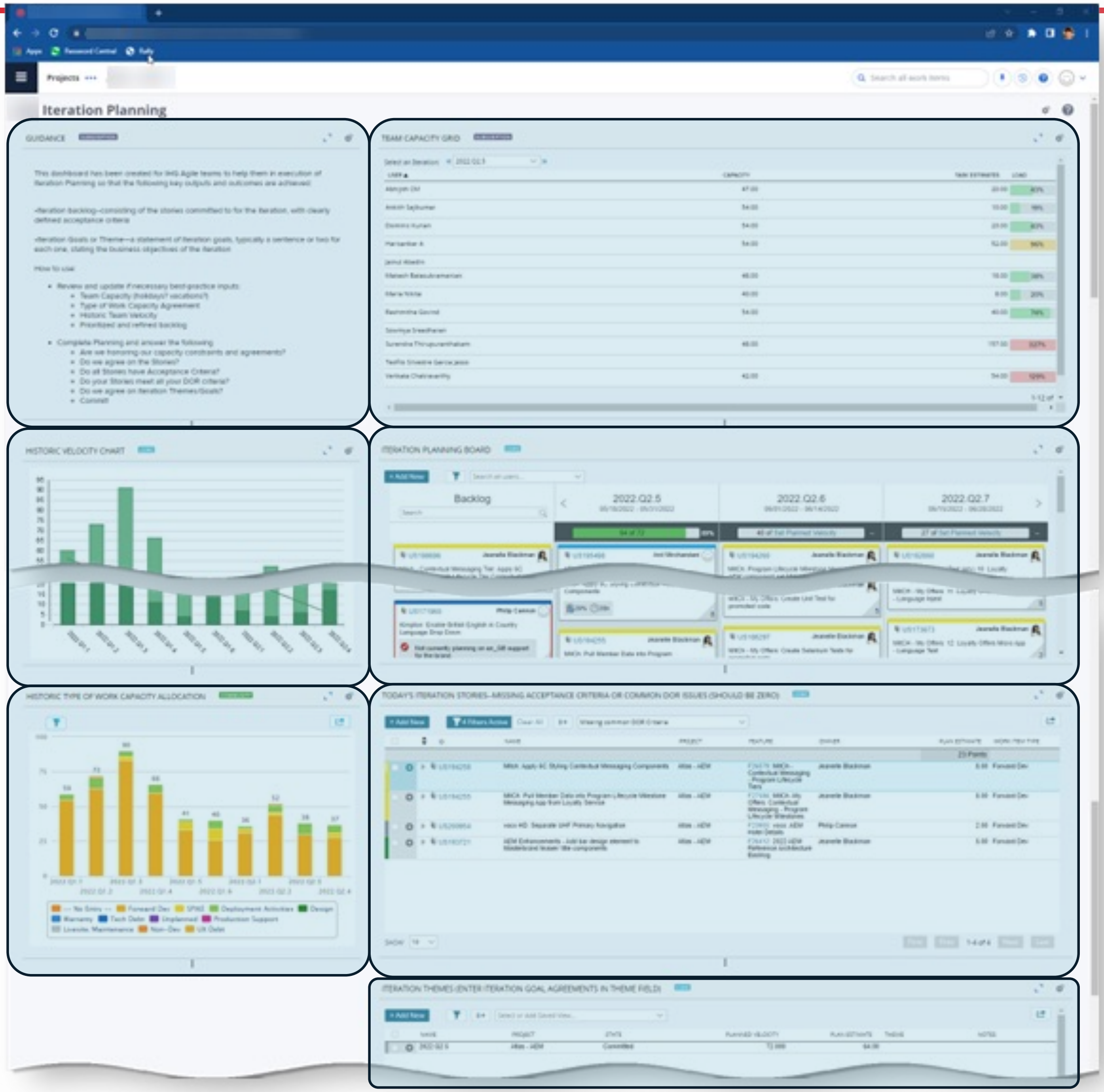
- Custom List App

Examples

Iteration Planning

This Rego Consulting dashboard has been created for Agile teams to help them in execution of Iteration Planning so that the following key outputs and outcomes are achieved:

- Iteration backlog--consisting of the stories committed to for the iteration, with clearly defined acceptance criteria
- Iteration Goals or Theme—a statement of Iteration goals, typically a sentence or two for each one, stating the business objectives of the iteration


Projects
Iteration Planning
GUIDANCE
TEAM CAPACITY GRID
HISTORIC VELOCITY CHART
ITERATION PLANNING BOARD
Backlog
2022.Q2.5
2022.Q2.6
2022.Q2.7
HISTORIC TYPE OF WORK CAPACITY ALLOCATION
TODAY'S ITERATION STORIES–MISSING ACCEPTANCE CRITERIA OR COMMON DOR ISSUES (SHOULD BE ZERO)
ITERATION THEMES (ENTER ITERATION GOAL AGREEMENTS IN THEME FIELD)

This dashboard has been created for IHS Agile teams to help them in execution of Iteration Planning so that the following key outputs and outcomes are achieved:

•Iteration backlog--consisting of the stories committed to for the iteration, with clearly defined acceptance criteria

•Iteration Goals or Theme—a statement of iteration goals, typically a sentence or two for each one, stating the business objectives of the iteration

How to use:

- Review and update if necessary best-practice inputs:
  - Team Capacity (holidays? vacations?)
  - Type of Work Capacity Agreement
  - Historic Team Velocity
  - Prioritized and refined backlog
- Complete Planning and answer the following:
  - Are we honoring our capacity constraints and agreements?
  - Do we agree on the Stories?
  - Do all Stories have Acceptance Criteria?
  - Do your Stories meet all your DOR criteria?
  - Do we agree on Iteration Themes/Goals?
  - Commit!

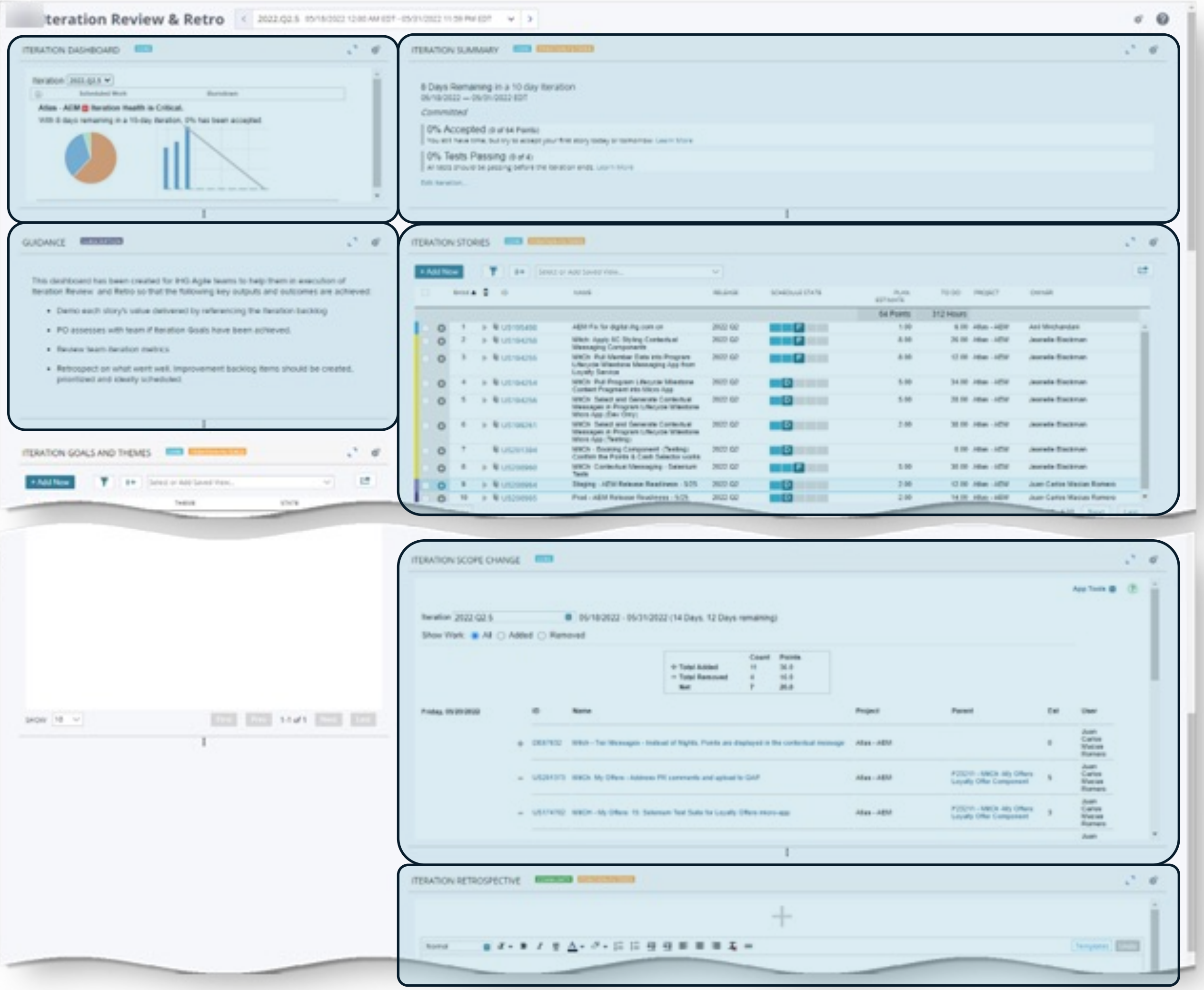
Examples

Iteration Review

The team inspects the increment at the end of every Iteration to assess progress, and then adjusts its backlog for the next iteration.

Each Agile Team measures and then demonstrates its progress by showing working stories to the Product Owner and other stakeholders to get their feedback.

Teams demonstrate the significant new behavior and knowledge gained from the iteration's Stories, Spikes, Refactors, and Nonfunctional Requirements (NFRs).



Iteration Review & Retro

2022.Q2.5 05/18/2022 12:00 AM EDT - 05/31/2022 11:59 PM EDT

ITERATION DASHBOARD

Atlas - AEM Iteration Health is Critical.

ITERATION SUMMARY

8 Days Remaining in a 10 day Iteration

05/18/2022 — 05/31/2022 EDT

Committed

0% Accepted

0% Tests Passing

GUIDANCE

This dashboard has been created for IHG Agile teams to help them in execution of Iteration Review and Retro so that the following key outputs and outcomes are achieved:

- Demo each story's value delivered by referencing the Iteration backlog
- PO assesses with team if Iteration Goals have been achieved.
- Review team iteration metrics
- Retrospect on what went well. Improvement backlog items should be created, prioritized and ideally scheduled.

ITERATION STORIES

ITERATION GOALS AND THEMES

ITERATION SCOPE CHANGE

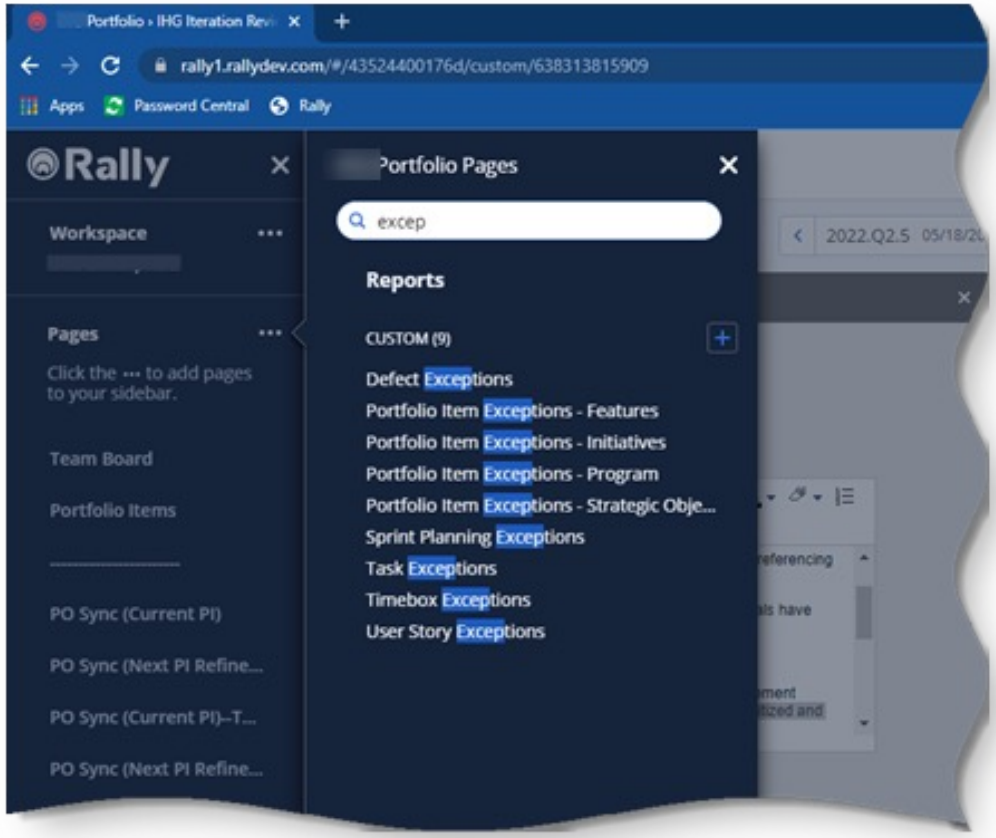
ITERATION RETROSPECTIVE

Examples

Data Hygiene Dashboards

Rego Consulting will help clients create the necessary dashboards for common data hygiene issues such as:

- Defect Exceptions
- Portfolio Item Exceptions - Features
- Portfolio Item Exceptions - Epics
- Portfolio Item Exceptions
- Sprint Planning Exceptions
- Task Exceptions
- Timebox Exceptions
- User Story Exceptions


[redacted] Portfolio › IHG Iteration Revi
rally1.rallydev.com/#/43524400176d/custom/638313815909
Apps
Password Central
Rally
Rally
Workspace
[redacted]
Pages
Click the ••• to add pages to your sidebar.
Team Board
Portfolio Items
PO Sync (Current PI)
PO Sync (Next PI Refine...
PO Sync (Current PI)--T...
PO Sync (Next PI Refine...
[redacted] Portfolio Pages
2022.Q2.5 05/18/2
referencing
ls have
ment
tized and

excep

Reports

CUSTOM (9)

Defect Exceptions
Portfolio Item Exceptions - Features
Portfolio Item Exceptions - Initiatives
Portfolio Item Exceptions - Program
Portfolio Item Exceptions - Strategic Obje...
Sprint Planning Exceptions
Task Exceptions
Timebox Exceptions
User Story Exceptions

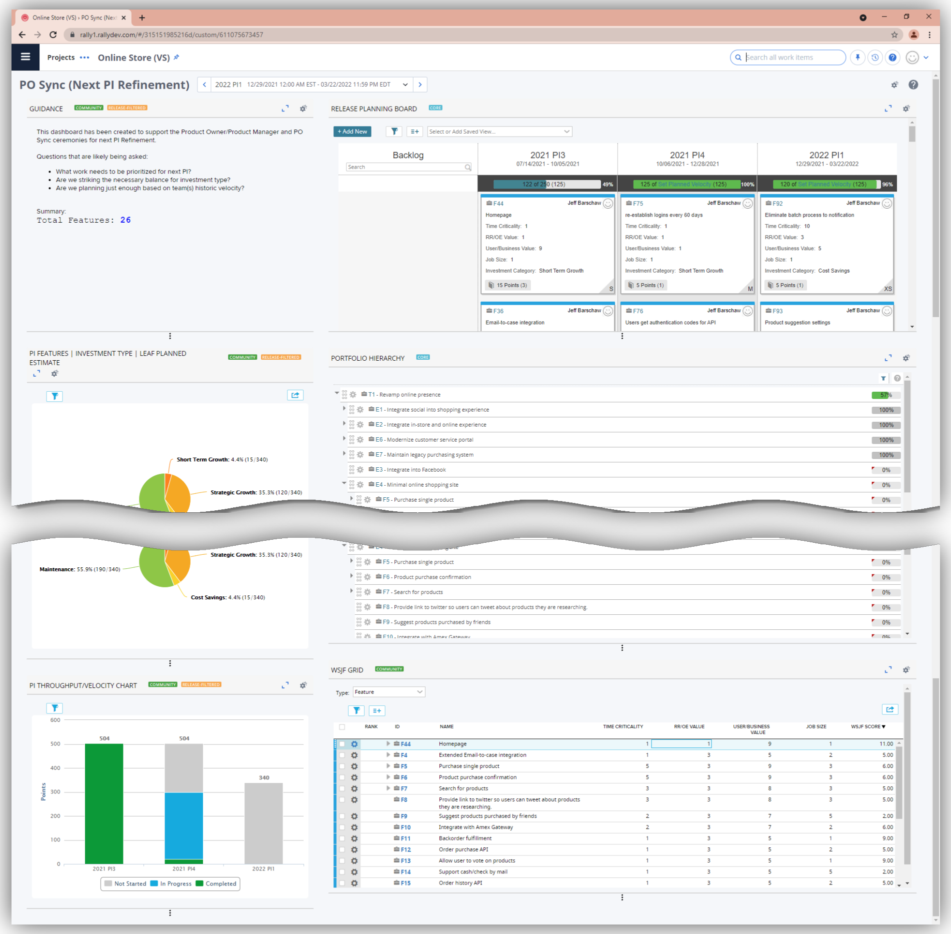
Examples

PO Sync

This dashboard has been created by Rego Consulting to support Agile Product Owners. It can be used to focus discussions during the PO Sync ceremonies for the current PI execution.

Questions that are likely being asked:

- Are we meeting our current PI Objectives?
- Are we protecting our time boundary for scope change?
- Do we have roadblocks that require us to adjust content and/or priority?


Online Store (VS) › PO Sync (Next
rally1.rallydev.com/#/315151985216d/custom/611075673457
Projects
Online Store (VS)
Search all work items
COMMUNITY
RELEASE-FILTERED
CORE
+ Add New
Select or Add Saved View...
Search
Short Term Growth: 4.4% (15/340)
Strategic Growth: 35.3% (120/340)
Maintenance: 55.9% (190/340)
Cost Savings: 4.4% (15/340)
600
500
400
300
200
100
0
Points
504
504
340
2021 PI3
2021 PI4
2022 PI1
Not Started
In Progress
Completed

PO Sync (Next PI Refinement)

2022 PI1 12/29/2021 12:00 AM EST - 03/22/2022 11:59 PM EDT

GUIDANCE

This dashboard has been created to support the Product Owner/Product Manager and PO Sync ceremonies for next PI Refinement.

Questions that are likely being asked:

- What work needs to be prioritized for next PI?
- Are we striking the necessary balance for investment type?
- Are we planning just enough based on team(s) historic velocity?

Summary:
Total Features: 26

RELEASE PLANNING BOARD

Backlog	2021 PI3 07/14/2021 - 10/05/2021	2021 PI4 10/06/2021 - 12/28/2021	2022 PI1 12/29/2021 - 03/22/2022
	122 of 250 (125) 49%	125 of Set Planned Velocity (125) 100%	120 of Set Planned Velocity (125) 96%
	F44 Jeff Barschaw Homepage Time Criticality: 1 RR/OE Value: 1 User/Business Value: 9 Job Size: 1 Investment Category: Short Term Growth 15 Points (3) S	F75 Jeff Barschaw re-establish logins every 60 days Time Criticality: 1 RR/OE Value: 1 User/Business Value: 1 Job Size: 1 Investment Category: Short Term Growth 5 Points (1) M	F92 Jeff Barschaw Eliminate batch process to notification Time Criticality: 10 RR/OE Value: 3 User/Business Value: 5 Job Size: 1 Investment Category: Cost Savings 5 Points (1) XS
	F36 Jeff Barschaw Email-to-case integration	F76 Jeff Barschaw Users get authentication codes for API	F93 Jeff Barschaw Product suggestion settings

PI FEATURES | INVESTMENT TYPE | LEAF PLANNED ESTIMATE

PORTFOLIO HIERARCHY

T1 - Revamp online presence	57%
E1 - Integrate social into shopping experience	100%
E2 - Integrate in-store and online experience	100%
E6 - Modernize customer service portal	100%
E7 - Maintain legacy purchasing system	100%
E3 - Integrate into Facebook	0%
E4 - Minimal online shopping site	0%
F5 - Purchase single product	0%
F5 - Purchase single product	0%
F6 - Product purchase confirmation	0%
F7 - Search for products	0%
F8 - Provide link to twitter so users can tweet about products they are researching.	0%
F9 - Suggest products purchased by friends	0%
F10 - Integrate with Amex Gateway	0%

PI THROUGHPUT/VELOCITY CHART

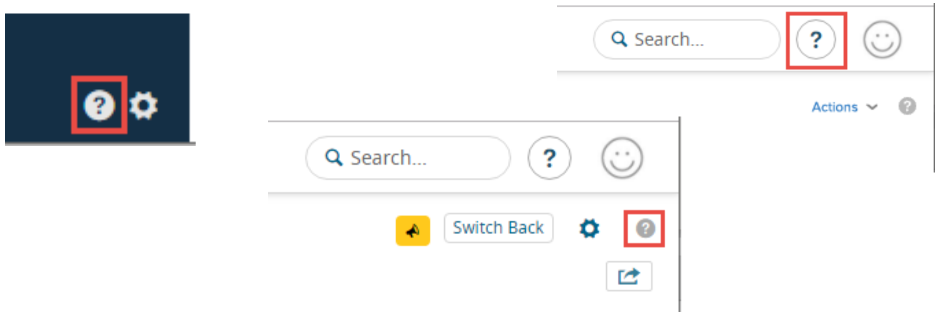
WSJF GRID

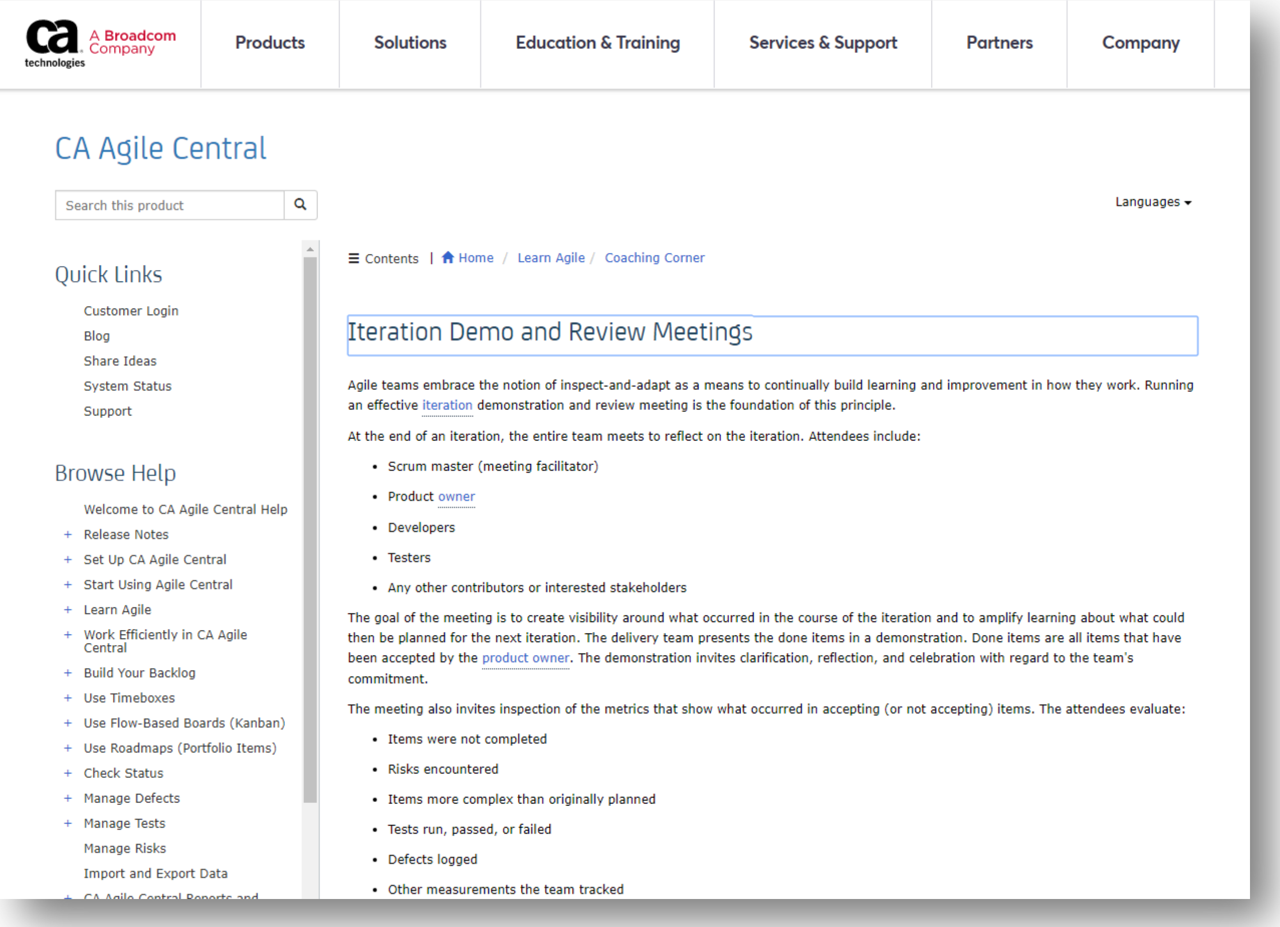
Type: Feature

RANK	ID	NAME	TIME CRITICALITY	RR/OE VALUE	USER/BUSINESS VALUE	JOB SIZE	WSJF SCORE ▼
	F44	Homepage	1	1	9	1	11.00
	F4	Extended Email-to-case integration	1	3	5	2	5.00
	F5	Purchase single product	5	3	9	3	6.00
	F6	Product purchase confirmation	5	3	9	3	6.00
	F7	Search for products	3	3	8	3	5.00
	F8	Provide link to twitter so users can tweet about products they are researching.	3	3	8	3	5.00
	F9	Suggest products purchased by friends	2	3	7	5	2.00
	F10	Integrate with Amex Gateway	2	3	7	2	6.00
	F11	Backorder fulfillment	1	3	5	1	9.00
	F12	Order purchase API	1	3	5	2	5.00
	F13	Allow user to vote on products	1	3	5	1	9.00
	F14	Support cash/check by mail	1	3	5	5	2.00
	F15	Order history API	1	3	5	2	5.00

Getting Help

- The help menu contains not only help on Rally features, but it also provides general agile/Agile tips and techniques
- The help menu can be quickly accessed throughout Rally—
- It is context aware and will usually take you directly to a relevant help page





CA Agile Central

Search this product

Languages

Quick Links

- Customer Login
- Blog
- Share Ideas
- System Status
- Support

Browse Help

- Welcome to CA Agile Central Help
- Release Notes
- Set Up CA Agile Central
- Start Using Agile Central
- Learn Agile
- Work Efficiently in CA Agile Central
- Build Your Backlog
- Use Timeboxes
- Use Flow-Based Boards (Kanban)
- Use Roadmaps (Portfolio Items)
- Check Status
- Manage Defects
- Manage Tests
- Manage Risks
- Import and Export Data
- CA Agile Central Reports and

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Iteration Demo and Review Meetings

Agile teams embrace the notion of inspect-and-adapt as a means to continually build learning and improvement in how they work. Running an effective iteration demonstration and review meeting is the foundation of this principle.

At the end of an iteration, the entire team meets to reflect on the iteration. Attendees include:

- Scrum master (meeting facilitator)
- Product owner
- Developers
- Testers
- Any other contributors or interested stakeholders

The goal of the meeting is to create visibility around what occurred in the course of the iteration and to amplify learning about what could then be planned for the next iteration. The delivery team presents the done items in a demonstration. Done items are all items that have been accepted by the product owner. The demonstration invites clarification, reflection, and celebration with regard to the team's commitment.

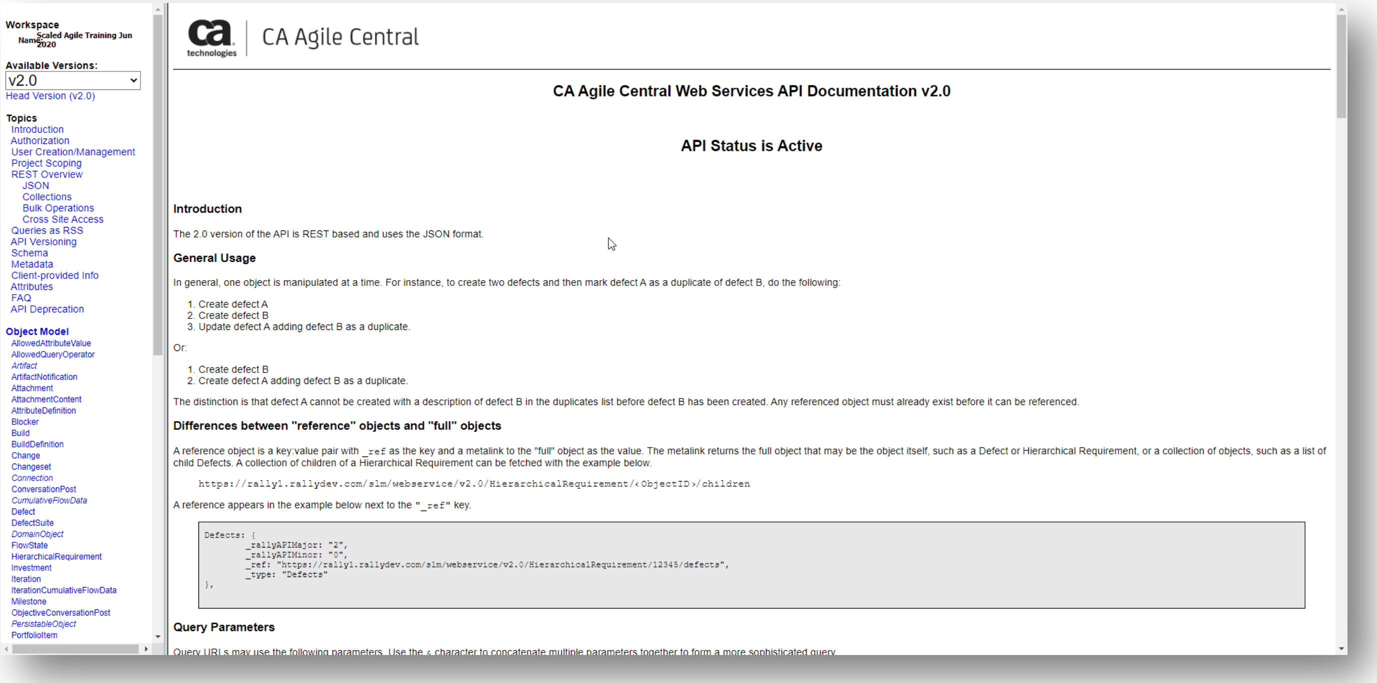
The meeting also invites inspection of the metrics that show what occurred in accepting (or not accepting) items. The attendees evaluate:

- Items were not completed
- Risks encountered
- Items more complex than originally planned
- Tests run, passed, or failed
- Defects logged
- Other measurements the team tracked

Web Services API (WSAPI)

The Rally Web Services Application Programming Interface (WSAPI) enables third party integration with Rally.

https://techdocs.broadcom.com/us/en/ca-enterprise-software/agile-development-and-management/rally-platform-ca-agile-central/rally/integrating-with-rally/building-rally-integrations/web-services-api-wsapi.html



Workspace
Name: Scaled Agile Training Jun 2020

Available Versions:
v2.0
Head Version (v2.0)

Topics
Introduction
Authorization
User Creation/Management
Project Scoping
REST Overview
JSON
Collections
Bulk Operations
Cross Site Access
Queries as RSS
API Versioning
Schema
Metadata
Client-provided Info
Attributes
FAQ
API Deprecation

Object Model
AllowedAttributeValue
AllowedQueryOperator
Artifact
ArtifactNotification
Attachment
AttachmentContent
AttributeDefinition
Blocker
Build
BuildDefinition
Change
Changeset
Connection
ConversationPost
CumulativeFlowData
Defect
DefectSuite
DomainObject
FlowState
HierarchicalRequirement
Investment
Iteration
IterationCumulativeFlowData
Milestone
ObjectiveConversationPost
PersistableObject
PortfolioItem

CA Agile Central

CA Agile Central Web Services API Documentation v2.0

API Status is Active

Introduction

The 2.0 version of the API is REST based and uses the JSON format.

General Usage

In general, one object is manipulated at a time. For instance, to create two defects and then mark defect A as a duplicate of defect B, do the following:

1. Create defect A
2. Create defect B
3. Update defect A adding defect B as a duplicate.

Or:

1. Create defect B
2. Create defect A adding defect B as a duplicate.

The distinction is that defect A cannot be created with a description of defect B in the duplicates list before defect B has been created. Any referenced object must already exist before it can be referenced.

Differences between "reference" objects and "full" objects

A reference object is a key:value pair with `_ref` as the key and a metalink to the "full" object as the value. The metalink returns the full object that may be the object itself, such as a Defect or Hierarchical Requirement, or a collection of objects, such as a list of child Defects. A collection of children of a Hierarchical Requirement can be fetched with the example below.

```
https://rally1.rallydev.com/slm/webservice/v2.0/HierarchicalRequirement/<ObjectID>/children
```

A reference appears in the example below next to the `"_ref"` key.

```
Defects: {
        _rallyAPIMajor: "2",
        _rallyAPIMinor: "0",
        _ref: "https://rally1.rallydev.com/slm/webservice/v2.0/HierarchicalRequirement/12345/defects",
        _type: "Defects"
},
```

Query Parameters

Query URLs may use the following parameters. Use the & character to concatenate multiple parameters together to form a more sophisticated query

Rally Technical Services - https://github.com/RallyTechServices
Rally Community - https://github.com/RallyCommunity

Questions?

Let’s Create a Dashboard together . . .

Please volunteer the following

- Purpose?
- Who is the intended users by Agile Role?
- At what part of the Agile cycle are we focusing?
- What questions would this Role be asking of the data?

Technical Info

Hosting

- Google Cloud Platform
- us-east1 and us-central1 regions
- Cloudflare for security

Browser Support

- **Chrome - Preferred**
- Firefox
- Safari (Mac only)
- Microsoft Edge

Support policy

Rally supports the two (2) latest versions of each of these browsers.

Links

- http://status.rallydev.com
- https://community.broadcom.com

Thank You For Attending regoUniversity

Instructions for PMI credits

- Access your account at pmi.org
- Click on **Certifications**
- Click on **Maintain My Certification**
- Click on **Visit CCR's** button under the **Report PDU's**
- Click on **Report PDU's**
- Click on **Course or Training**
- Class Provider = **Rego Consulting**
- Class Name = **regoUniversity**
- Course **Description**
- Date Started = **Today's Date**
- Date Completed = **Today's Date**
- Hours Completed = **1 PDU per hour of class time**
- Training classes = **Technical**
- Click on **I agree** and **Submit**

Let us know how we can improve!
Don't forget to fill out the class survey.

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