Using Rally in DSE

This document will walk you through using Rally as the Single Source of Truth (SSoT) for the roadmap. This encompasses using Rally for the internal Super App backlog, the Web development backlog, and Rally tips and tricks in general.

TABLE OF CONTENTS

How to use Rally for DSE

Rally can be mystifying, complex, and downright confusing for a lot of people who are not "used to it." Which we all know is bad design. It is the SSoT for the Super App effort, and to keep us all on the same page, it is what we are using for both Web and Native for DSE, Super App or not.

We have 2 epics that the majority of DSE will follow, and for the sake of brevity we will use Super App as the example.

The Super App Epic

DSE: Super App (Native):
[Link Redacted]

The epic is a high-level view of the container under which all of our Super App new component development efforts are stored. It provides information as to what we are doing and why. The Product Lead handles most, if not all, the information on this page. Below this page is the Children page which sorts and ranks all the "child" features.

To access the features in the epic, select the link above then click the "Children" Button:


Viewing Features in Rally

The features are the "tickets" we use to sort and define our stories. These are described at a mid-level to provide guidance to the various teams in creating/modifying components. Features are the lifeblood of the Rally experience. It is best to bookmark this page for future reference as it will be accessed often, and the epic can potentially move around within the backlog.

Super App (Native) sorted view.

Views are saved order/sort functions for Rally. Although each row is sortable like a spreadsheet or database table, the view is the established and selected sort for the epic. For this epic, the **Super App (Native) sorted** view is the one you need to select from the dropdown.
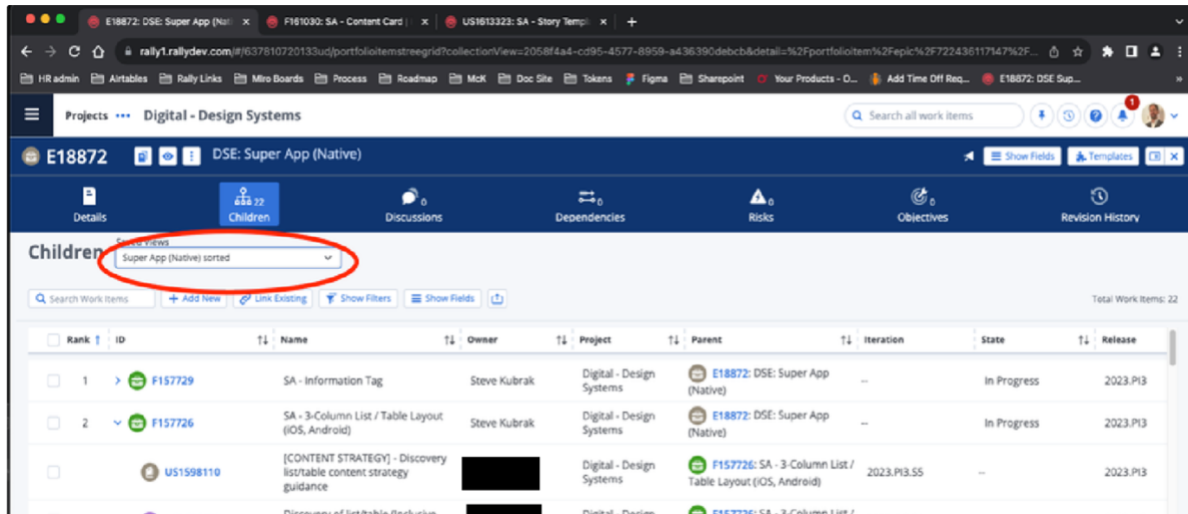
The Children Feature List

Once the view is accessed, it shows the child features sorted by priority that we have established and (hopefully) updated within the last workday. They are also color-coded and state sorted.

Feature Colors

- **Green:** The feature is either being actively worked on, we have enough information in the feature to get started on it whenever we choose, or it is ready to refine. Green must have an accompanied state (listed below.)
- **Yellow:** The feature is currently being fleshed out or in pre-refinement. Yellow is never in 'Prepare' or higher.
- **Gray/Blue:** This feature is a placeholder which might become a larger feature in the future.
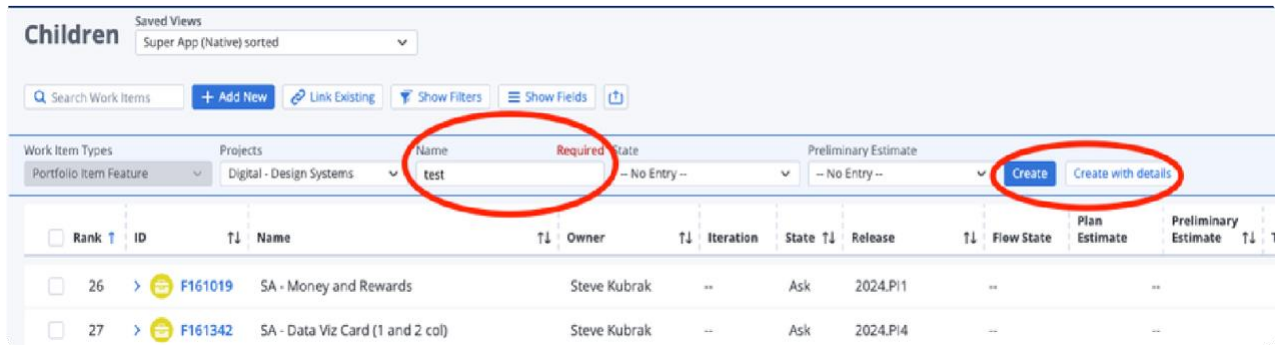
Feature States

- **In Progress:** The feature is actively being worked on. (In Progress will always be green)
- **Ready:** The feature is refined and vetted, and sitting in the queue for assignment. (Ready will always be Green)
- **Prepare:** The feature can be sent for refinement. (Prepare and Green is "ready to refine")
- **Ask:** The feature is in pre-refinement and is still being worked on by the Product Lead and/or Senior Developers or Engineers. (All Asks are yellow)
- **Empty:** This feature is a placeholder which might become a larger feature in the future.

Clicking on the caret next to the feature name opens the list of stories, and shows their flow state on the far right. (Accepted, Completed, InProgress, Needs Definition. This will be covered lower in this document.

Writing Features in Rally

Create a New Feature

1. Click on the "Add New" button, usually located in the top-left or top-right corner of the Rally dashboard.
2. A form appears below the button. Add a name in the required field. NB: When you apply the template to this feature, it will overwrite that name, so don't make it any more descriptive than you need it to be.
3. You can enter a state here, but it doesn't need one. However, since it is new, "Ask" is appropriate.
4. Likewise, it does not need an estimate, but adding M as the t-shirt size can get you started.
5. Clicking Create will create the feature and add it to the list below and keep you on this form. Clicking "Create with details" will add it to the list and then take you into the feature screen for the newly added feature.
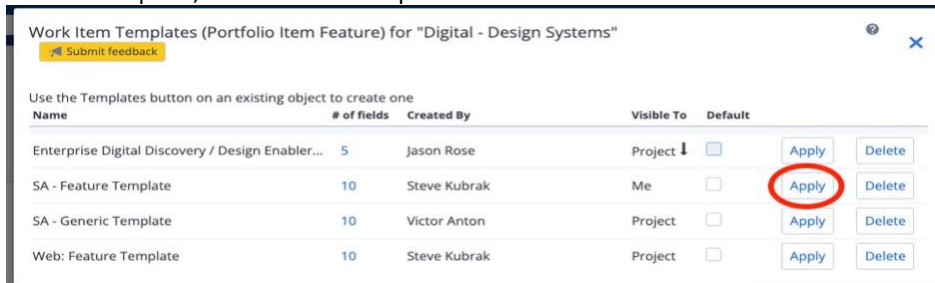
Using the Feature Template

Before you do any writing, you should apply the template you need. The template sets up the feature with pre-selected verbiage and stories. As stated before, applying a template will **erase anything you have previously entered**, at any time, to the feature. Please use it wisely. Applying a template means selecting the template button from the upper right of the page, and then selecting the appropriate template for your epic from the modal.
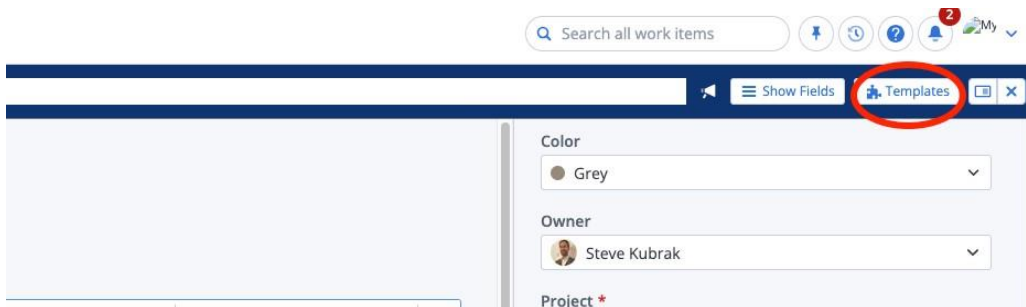
There are 2 templates to use, depending on what epic you are under.

For the DSE: Super App (Native) epic:

Use the template, "SA - Feature template"

For the DSE: Web Components epic:

Use the template, "Web: Feature Template"

There may be other similarly named templates, but those could be either old, testing, or ones that have been made by other users in our project. Use only the two mentioned above. The screenshots may not reflect the current state of all the templates available.

Fill in Feature Details

[Details image redacted for proprietary reasons]

Once you have selected and applied the appropriate template, you will to fill in the details of the feature in the now filled out form. Here are the key fields to complete:

- **Name/Summary:** Provide a concise and descriptive title for the feature. It should be easily understood by anyone who reads it.
- **Description:** In this field, provide a detailed explanation of the feature. What is the goal of this feature? What problem does it solve? Who are the stakeholders? What are the expected outcomes? Be as clear and comprehensive as possible.
- **Schedule State:** Choose the appropriate schedule state based on the development stage of the feature. Common states include Defined, In-Progress, Completed, and Accepted.
- **Owner:** Assign an owner to the feature. This is typically the team or individual responsible for the feature's development.
- **Tags:** Add relevant tags to help categorize and organize features. Tags can be useful for searching and filtering features.
- **Attachments:** You can attach files, images, or any other documents related to the feature.
- **Acceptance Criteria (AC):** ACs are specific conditions that must be met for the feature to be considered complete. They help in ensuring a common understanding of what success looks like for the feature. Please consult the PM in order to define the appropriate ACs.

Writing User Stories in Rally

This is a quick walkthrough on the MANY things Rally can do. This guide is not exhaustive.

To create a new user story, click the "+ Create" button. This is usually located at the top of the user stories list or backlog page.

Using the Story Template

Before you do any writing, you should apply the appropriate template. The template sets up the story with pre-selected verbiage. As stated before, **applying a template will erase anything you have previously entered**, at any time, to the story. Please use it wisely.

Applying a template means selecting the template button from the upper right of the page, and then selecting the appropriate template for your feature from the modal.
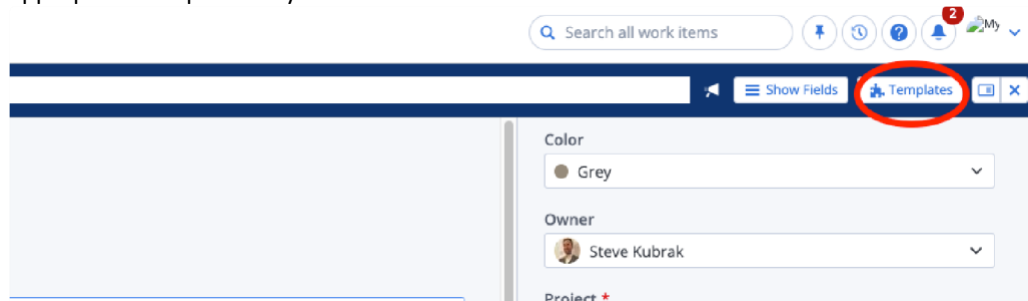
For Web Stories, use the template, Web: Story Template.

Work Item Templates (User Story) for "Digital - Design Systems"

There may be other similarly named templates, but those could be either old, testing, or ones that have been made by other users in our project. Use only the two mentioned above. The screenshots may not reflect the current state of all the templates available.

Fill in story details

These fields are in the main section of the story page

- **Name (or Title):** On the top of the screen. This should be a concise, descriptive name for your user story.
- **Description:** This text box contains several spaces that need to be filled out. The fields are explained on the page.
- **Attachments:** Add any external supporting documentation here. Includes images, pdfs, Microsoft documents, etc.
- **Notes:** Not needed to get started, but is a good location to jot down anything that isn't relevant to the description or isn't part of active discussion.

These fields are in the right rail of the story page

- **Color:** Part of the color-coded system we use as an extra layer for quick identification
  - **Green:** We have enough to get started on it, either right away or in the next sprints
  - **Yellow:** We are either still working on filling out the story and it will need further work
  - **Gray:** It's a placeholder or it's something we want out of the way
  - **Blue:** The default color. If you are unsure of what color this story needs to be, leave this as default
- **Owner:** Usually you, unless you are writing the story for someone else
- **Schedule State:** Set the current status of the user story, this is the same as the Flow State.
  - **Needs Definition:** Essentially a blank story. It needs all the info to get started.
  - **Defined:** We have enough to get started on this story.
  - **In-Progress:** Actively being worked on.
  - **Completed:** You have finished your part on it, and you can now either send it to be reviewed/accepted, or it can be re-assigned to someone else for testing/review.
  - **Accepted:** Everyone has done everything and it's a go!
- **Plan Estimate:** How many points do we think this will take? We use the Fibonacci sequence: 1, 2, 3, 5, 8, 13...
  - Note, anything above a 5 is too big (it won't get done in a sprint) and means that your story needs to be broken down into smaller chunks.
  - It is possible to have .5 stories, these are super-fast but we don't want to put 0.

- **Release:** This is the PI aim to release the story in. If unsure, select the one we are currently in. This is usually in bold in the dropdown.
- **Iteration:** This is the sprint we want to work on this story. Leave it blank for now and we will assign it in sprint planning. Unless you are sure of the sprint, then select it.
- **Priority:** Please consult the PM before setting the priority
- **Size (Estimation):** You can use story points, ideal days, or other estimation methods to estimate the size of the user story.
- **Link to Dependencies:** If the user story has any dependencies, link them to the story. This helps in managing relationships between user stories, tasks, and defects.
- **Save the User Story:** Click the "Save" or "Create" button to save your user story. This will add it to your backlog or the specific project module you're working in.

In Conclusion

This concludes this documentation. Please contact Steve Kubrak though email, Slack, Teams, or the DSE Helpdesk with any questions and/or comments.