

ACE 202

Rally Dashboards



Agile Center of Excellence

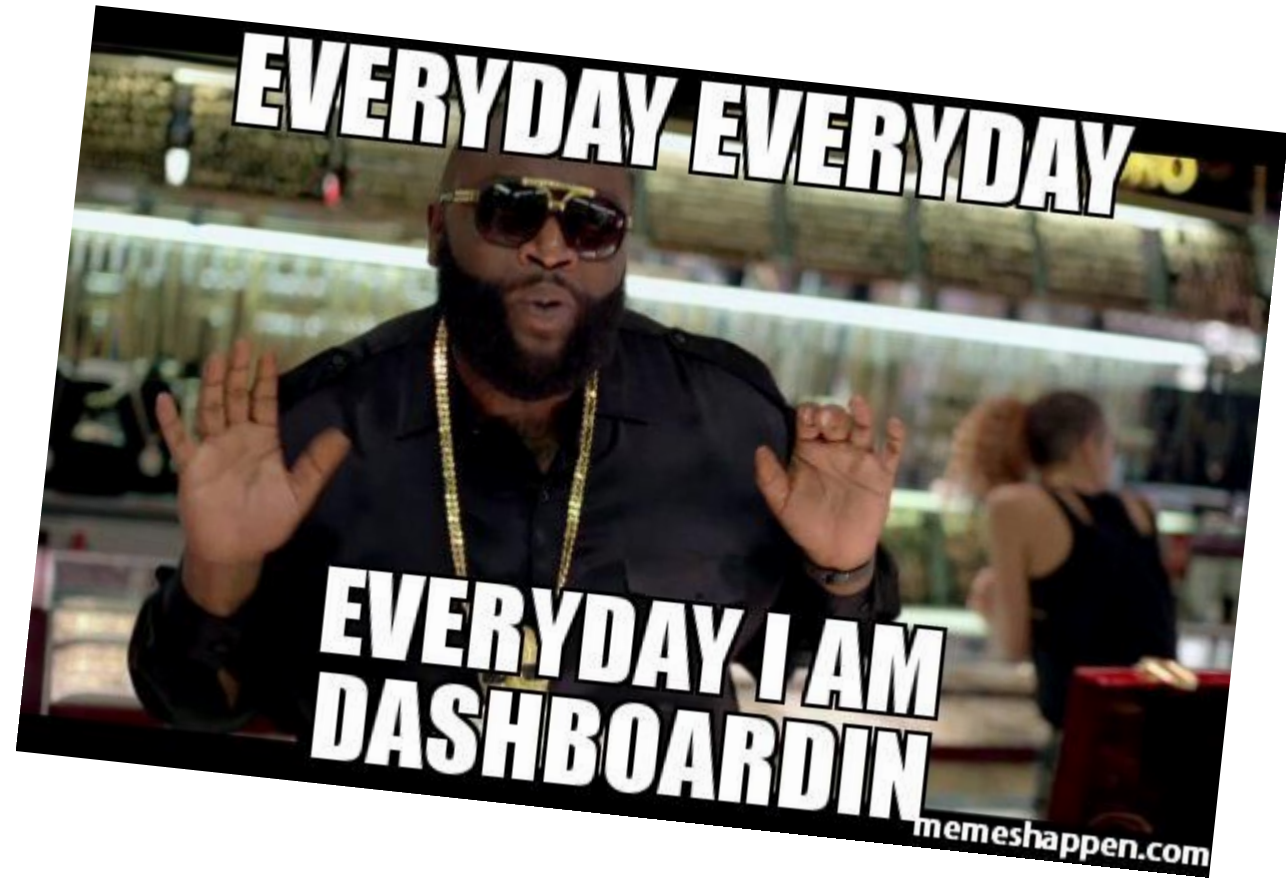
Why are dashboards important?

- Transparency
- Collaboration
- Optimization

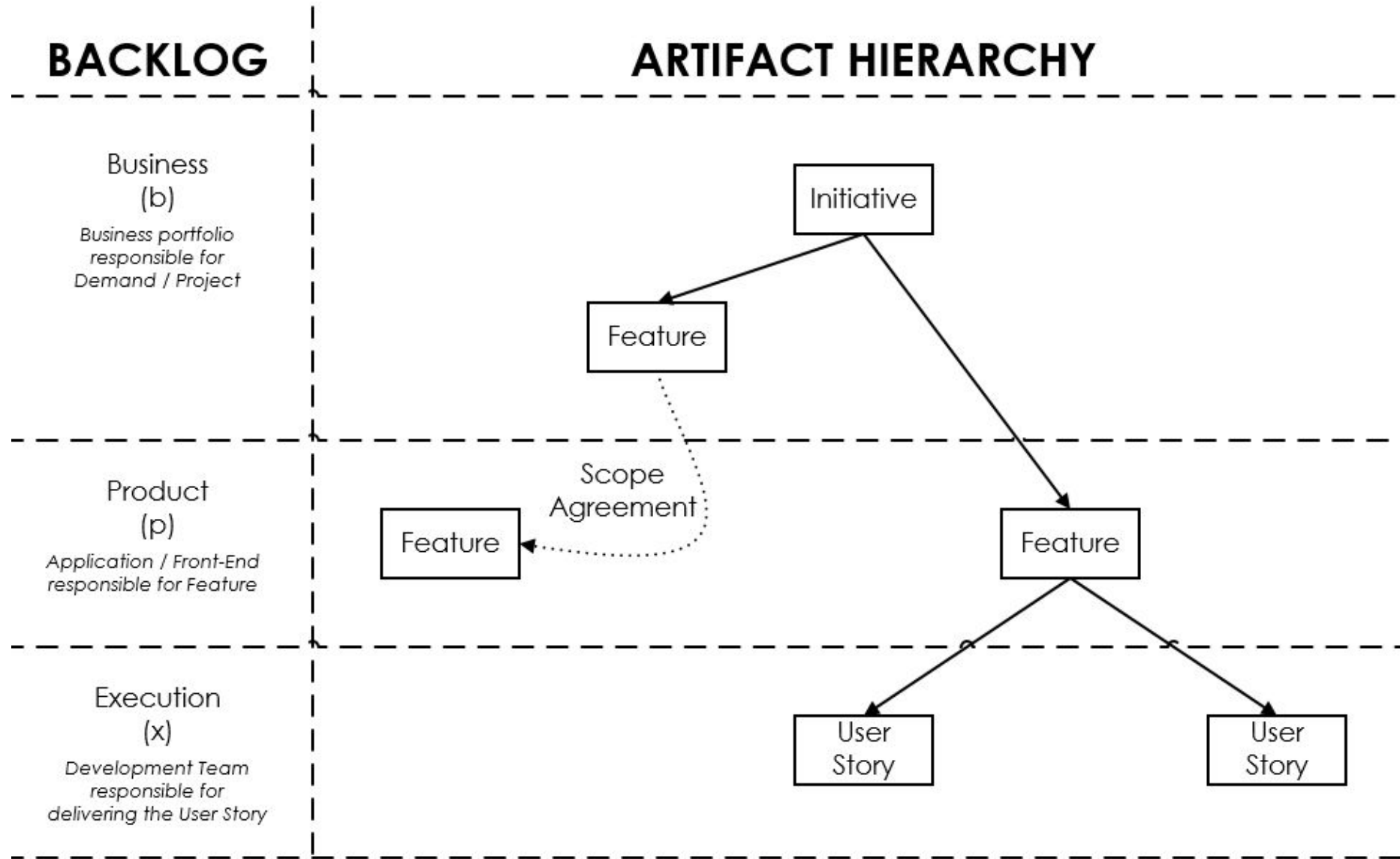


Overview

- Follow Along
 - Custom List
 - Custom Kanban Board
 - Other boards
- On a Scale of 1 - 5, post your level of comfort with dashboards in the meeting chat, with 1 as never built a dashboard, and 5 as move over, you are going to teach this session!



Artifact Hierarchy and Backlogs

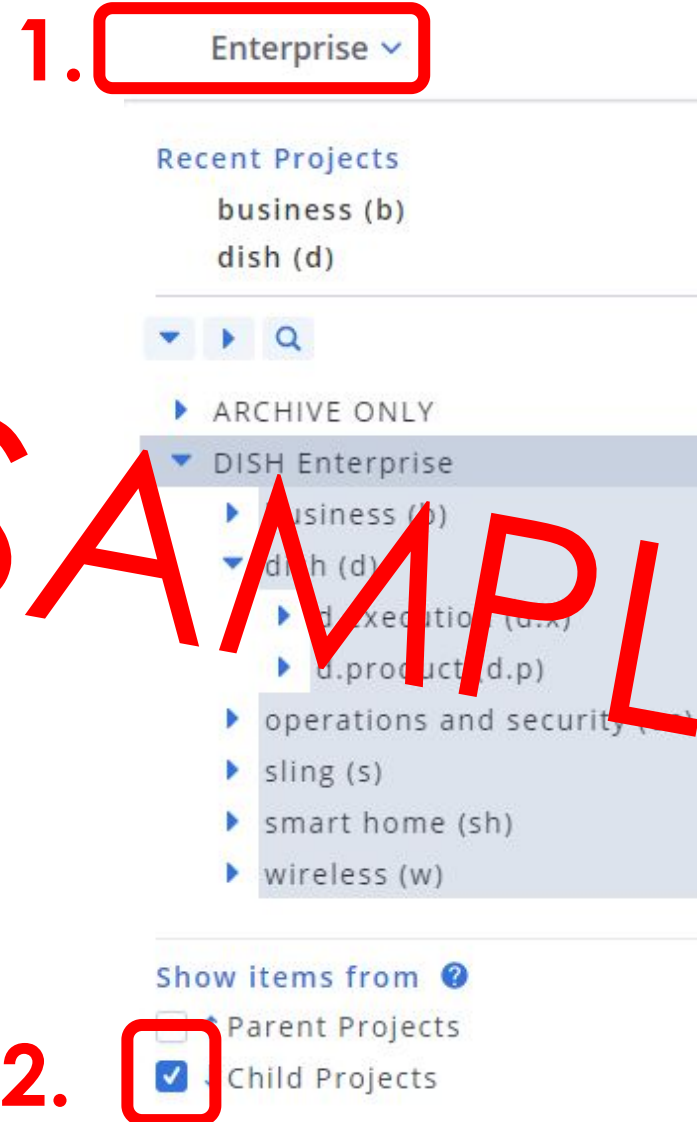


Creating Rally Dashboards

1. Select Enterprise
2. Select 'Child Projects'
 - This will display all child artifacts of whatever branch is selected

NOTE:

- Later we will see how this can be used as a filter to limit the results that are displayed

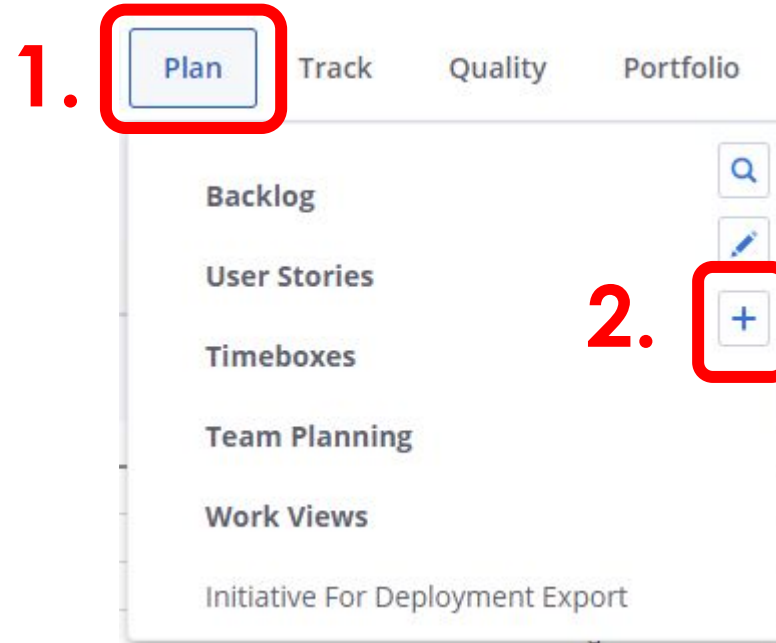


Creating Rally Dashboards

1. Select desired tab where dashboard will be located
2. Select '+'

NOTE:

- Location of the dashboard does not impact the functionality



Creating Rally Dashboards

1. Provide an appropriate name for the dashboard
2. Save & Close

NOTE:

- If you have Project Admin access, this is where you create and share reports
- You can add a dashboard filter that will apply to all apps you add to your dashboard

Create Custom Page

Name:

Share with all projects: ☐

Share with selected projects: ☐

Sharing this page with new Projects will prevent some Project Admins from being able to edit this shared page until they are made Project Admin or above in the Project(s) you are adding for this page.

Type to search...

AVAILABLE

- ☐ 1. SL-Business (SL.B)
- ☐ 2. SL-Product (SL.P)
- ☐ SL-Execution (SL.E)
- ☐ Ad Sales
- ☐ ARCHIVE ONLY
- ☐ b.billing & credit
- ☐ b.broadband
- ☐ b.cfo

Hold down the **Shift** key when selecting a project to select or deselect all child projects.

Show Filter: ☒ None ☐ Iteration ☐ Release ☐ Milestone

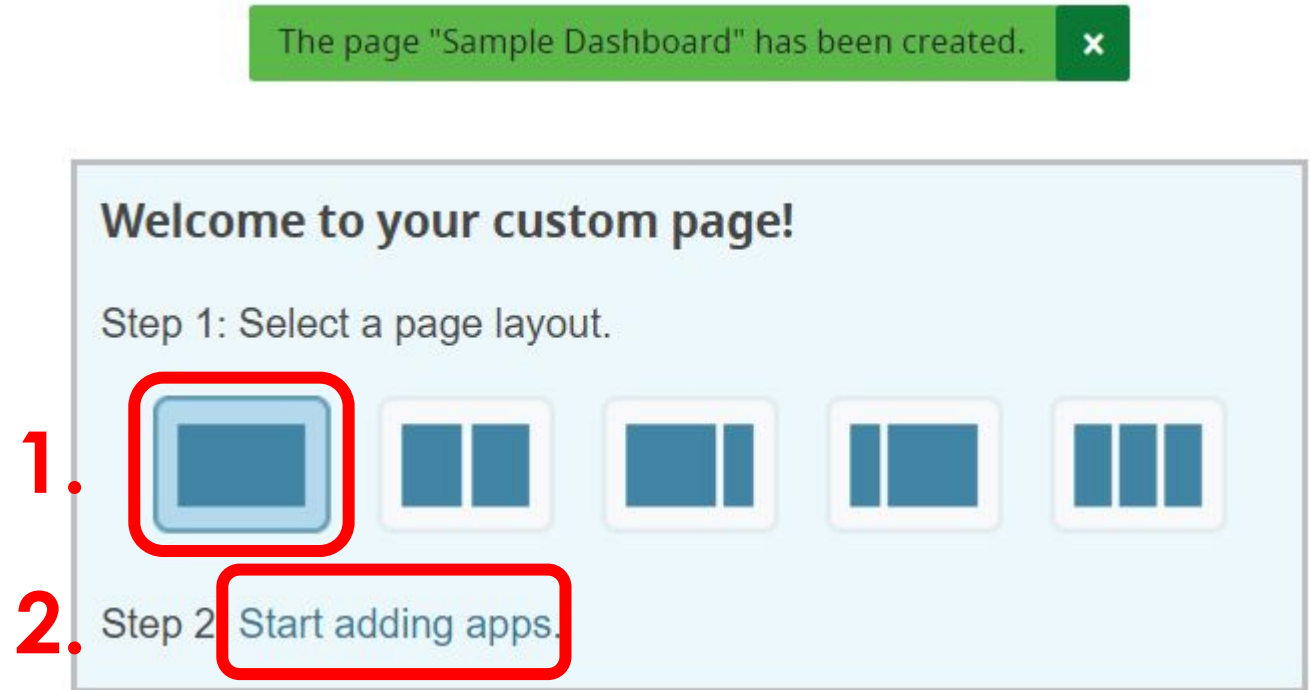
2.

Creating Rally Dashboards

1. Select a page layout
2. Start adding apps

NOTE:

- This can be changed at any point in the future



1. Search for 'Custom' apps
2. Navigate to Custom list and select 'Add'

- There are hundreds of standard and custom applications, this class will provide a brief overview of some of the more popular
- For app-specific questions, please reach out to me directly

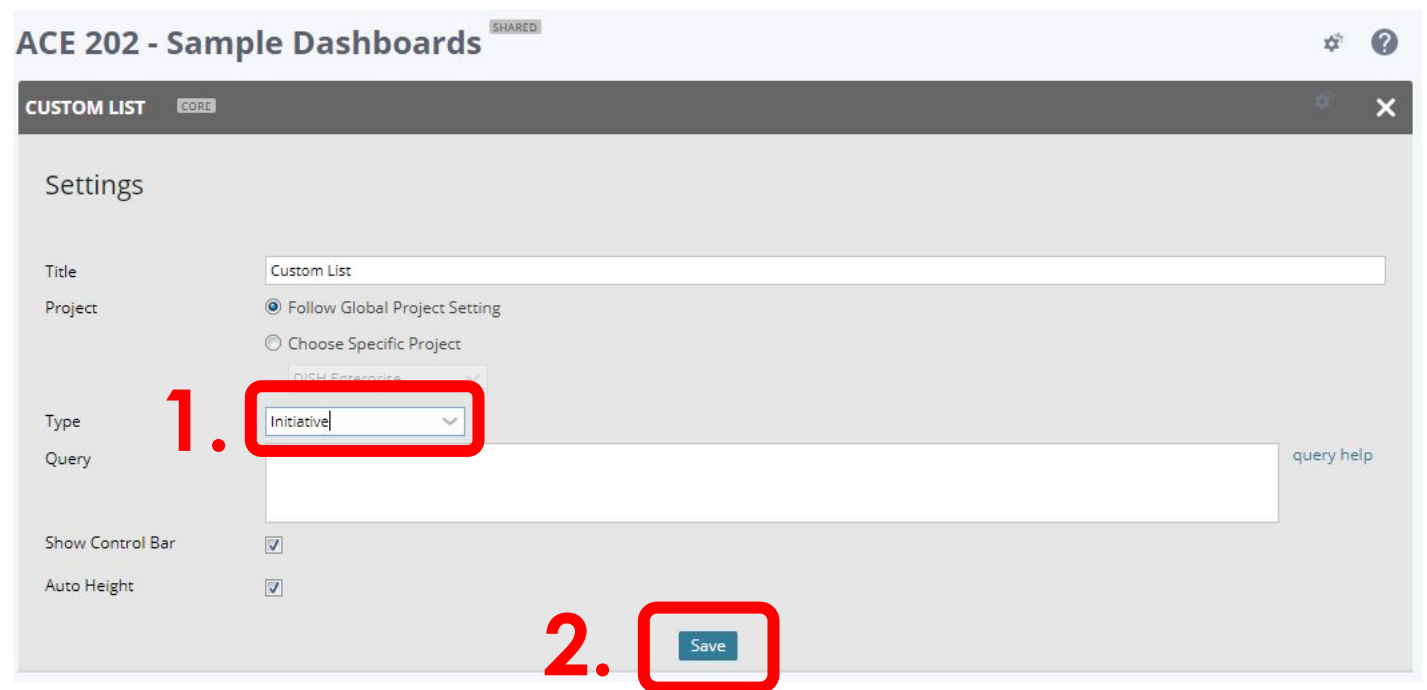


Creating Rally Dashboards

1. Select 'Initiative' in Type field
2. Save

NOTE:

- You can change the Type to display whatever artifact category you desire
- Can be accessed by clicking on the cog icon on the dashboard (upper right)
- ...*hint, hint, hint for later activity*




Creating Rally Dashboards

1. Click 'Show Columns' button and select or de-select which fields you want
2. Ensure the Show field displays '200'

ACE 202 - Sample Dashboards SHARED

CUSTOM LIST CORE

+ Add New 1.  Select or Add Saved View...

Show Columns

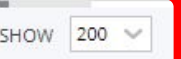
Search

SELECTED

- ☒ ID
- ☒ Name
- ☒ Percent Done By Story Count (Initiative, Feature)
- ☒ Project
- ☒ Rank
- ☒ State (Initiative, Feature, Defect, Task)

Apply Cancel

		STATE	PERCENT DONE BY STORY COUNT	PROJECT ▼	OWNER
<input type="checkbox"/>	Version V2.0 Core	Developing	66%		
<input type="checkbox"/>	Integrate onto NHG V2.0	Design	0%		
<input type="checkbox"/>	New Architecture	Developing	62%		
<input type="checkbox"/>	or Development	Design	17%		
<input type="checkbox"/>	rs V2.0 Core	Design	12%		
<input type="checkbox"/>	Project Manager		0%		
<input type="checkbox"/>	less - TSC		0%		
<input type="checkbox"/>	Management for Wireless		0%		
<input type="checkbox"/>	Bridging		0%		
<input type="checkbox"/>	Router	Testing	0%		
<input type="checkbox"/>	rs & Field Testing	Developing	0%		
<input type="checkbox"/>	I3962 Platform APIs and UIs	Testing	0%		
<input type="checkbox"/>	I3966 Automated Deployment	Developing	0%		
<input type="checkbox"/>	I3970 Documentation	Developing	0%		
<input type="checkbox"/>	I3993 Evaluate Open Source Projects		0%		
<input type="checkbox"/>	I4031 AWS Research	Delivered	0%		

2.  First Prev 1-200 of 4263 Next Last

Creating Rally Dashboards

1. Click filter icon
2. Click 'Advanced Filters'
3. Search for:
 - Project = 'b.retention'
 - State = 'Developing'

NOTE:

- Project on Initiative in Rally = Business Portfolio on Project in ServiceNow
- Can also use the drop down to filter

The screenshot displays the 'ACE 202 - Sample Dashboards' interface. At the top, there's a 'CUSTOM LIST' section with a '+ Add New' button and a filter icon (a funnel) circled in red, labeled '1.'. Below this is a search bar and a 'Filter by Owner...' dropdown. To the right, an 'Advanced Filters' button is circled in red, labeled '2.'. Below the search bar, a filter configuration table is shown, circled in red, labeled '3.'. This table has columns for FIELD, OPERATOR, and VALUE. It contains two entries: 'Project' with operator '=' and value 'b.retention', and 'State' with operator '=' and value 'Developing'. Below the filter configuration, a table of project data is visible, with columns for RANK, ID, NAME, RELEASE, STATE, and two progress bars. A large red 'SAMPLE' watermark is overlaid on the table. At the bottom right, there are pagination controls showing '1-23 of 23'.

FIELD	OPERATOR	VALUE
Project	=	b.retention
State	=	Developing

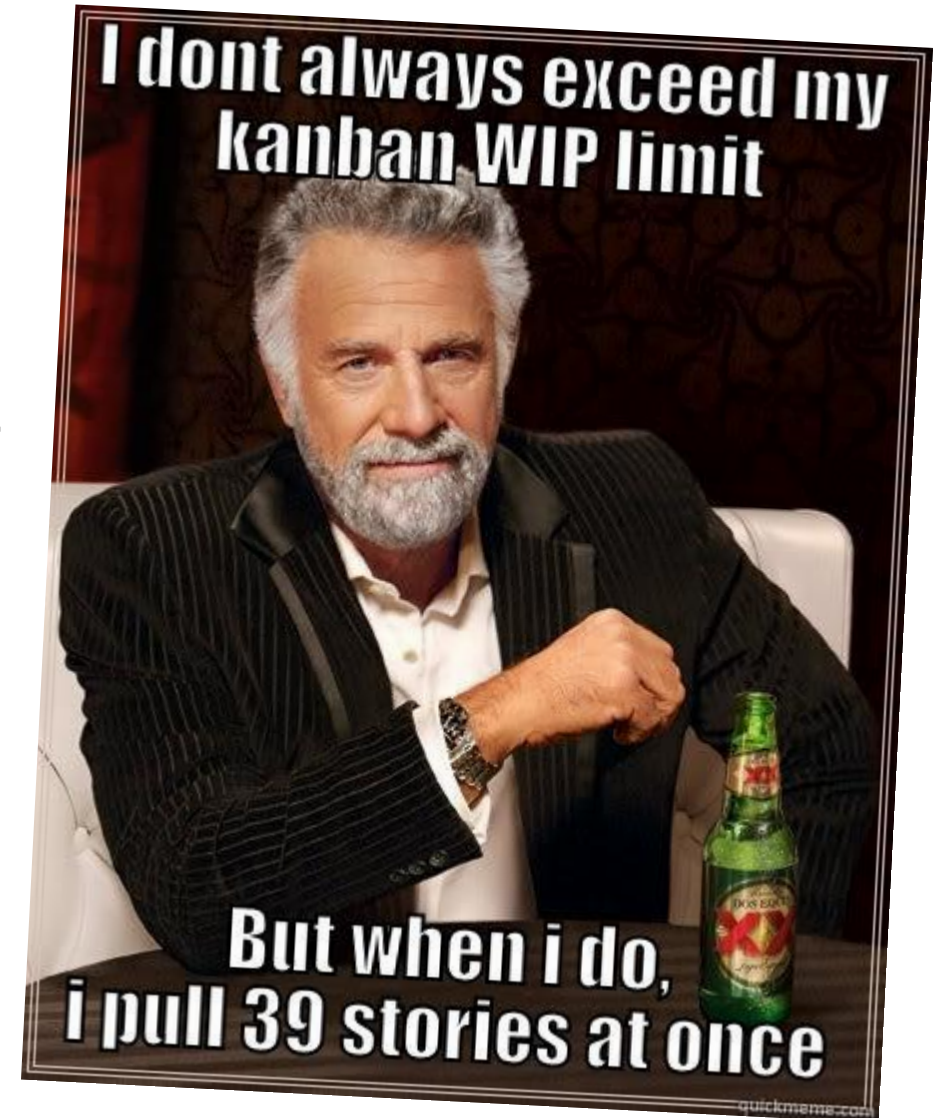
RANK	ID	NAME	RELEASE	STATE	PERCENT DONE BY STORY PLAN ESTIMATE	PERCENT DONE BY STORY COUNT
12669		Upgrade Core Package Offer	--	Developing	97%	96%
12703		Receiver Upgrade Tag Codes	--	Developing	100%	100%
12749		50% Discount for 54.0 Remote	--	Developing	100%	100%
12816		Rebrand VOD to On Demand	--	Developing	100%	100%
13008		Increase Promise to Pay Fee to \$12	--	Developing	100%	100%
13145		Attach Tags Through Responsys	--	Developing	100%	100%
13261		Develop Dish Outdoors Pace Offer	--	Developing	100%	100%
13327		Develop Dish Hopper Tag Code	--	Developing	100%	100%
13361		Data - Update PMAs for Various Rate Plan Offers	--	Developing	0%	0%
13362		Data - Update PMAs for Various Take-in Offers	--	Developing	100%	100%
13363		Data - Update PMAs for Various Take-out Offers	--	Developing	100%	100%
13802		DISH Protect Service Increase	--	Developing	100%	100%
13848		Data - Remove Dish America from CS Web - STB	--	Developing	100%	100%
13910		Data - Remove OTA Field Support Loyalty	--	Developing	100%	100%
14029		Data - Create Option to Easily Upgrade Outdoor Equipment	--	Developing	0%	100%
14797		Price Lock \$10 x 24mo	--	Developing	96%	87%
14816		Data - Implement Orbital Migration for Specific Customers	--	Developing	100%	100%
14977		Data - Meridith	--	Developing	100%	100%
15403		DISH Scapes Package	--	Developing	81%	84%
15525		Additional Discover More Offers	--	Developing	81%	85%
16428		Latino Bonus Special Offer	--	Developing	33%	30%
16527		Remove Webroot from Dish Protect Gold and Platinum	--	Developing	29%	56%

Dashboard Activity

- Find how many Initiatives with the following criteria:
 - Project = b.sales (b.s)
 - Project = b.programming & State = Delivered
 - Project = b.cxo & Percent Done by Story Count = 1
- Find how many Features with the following criteria:
 - Milestone = RD-2020.08.13
 - Actual Start Date after January 1, 2020
 - (hint - show field Actual Start Date to verify)
 - Actual End Date after January 1, 2020
 - (hint - show field Actual End Date to verify)
- Any special requests?

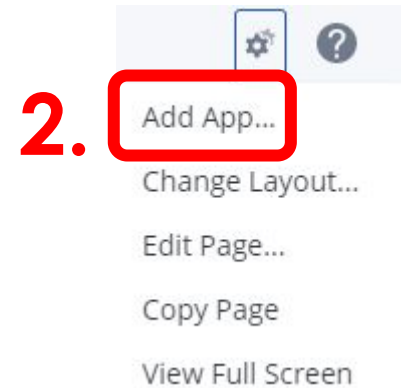
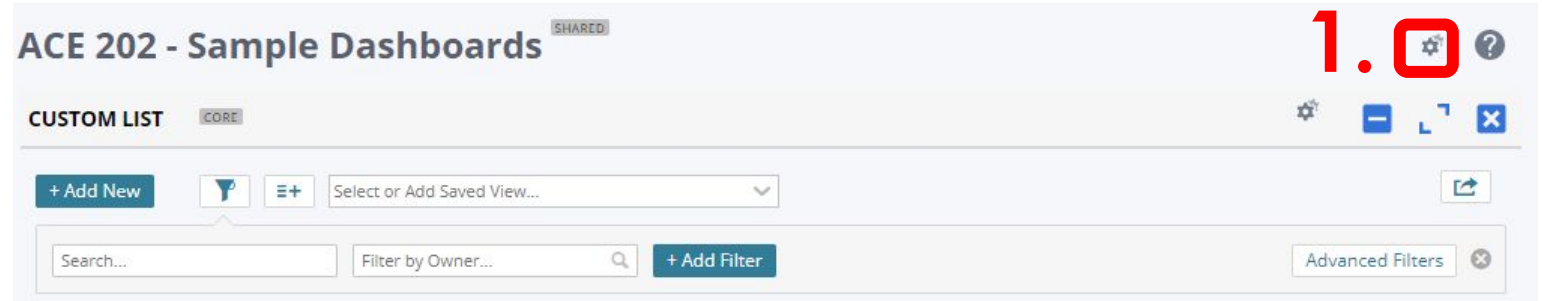
What is a Kanban Board

- Visualize Workflow
- Limit Work in Progress (WIP)
- Measure Flow
- Make Entry/Exit Policies Explicit
- Improve Collaboratively



Adding Apps to a Dashboard

1. Click on the upper cog to add a new App
2. Select 'Add App'



Creating Rally Dashboards

1. Search for 'Custom' apps
2. Navigate to Custom list and select 'Add'

App Catalog [Submit Feedback](#)

SOURCE: All **1.** CATEGORY: Boards SEARCH:

Results: 11 Shift+select the Add button to keep the catalog open after adding an app.

CUSTOM BOARD **CORE**

Create a board that shows the data you want.

Add

Estimation Board **CORE**

The Estimation Board provides a view of unaccepted stories, defects and defect suites organized by plan estimate sizes.

Add

Iteration Planning Board **CORE**

The Iteration Planning Board can be used to visualize and assign your User Stories and Defects within the appropriate iteration.

Add

Iteration Tracking **CORE**

The Iteration Tracking Board can be used to visualize and manage your User Stories and Defects within an Iteration.

Add

Kanban Board **CORE**

The Kanban Board gives teams the option of managing pull-based, lean software development projects.

Add

Portfolio Kanban Board **CORE**

Track the status of your portfolio items as they move along in your portfolio process.

Add

Updating Boards

1. Click on Cog Wheel
2. Select 'Settings'
3. Give the App a Title
4. Choose the Artifact type to display
5. Select the Columns
6. Select the Swimlane
7. Save

The screenshot shows the 'Sample Dashboard' interface. At the top, a green notification bar states 'View "Sample View" has been added.' Below this, the 'CUSTOM BOARD' section is visible, featuring a '+ Add New' button, '2 Filters Active', 'Clear All', and a search bar with 'Adam Nichols'. A red number '1' points to the cogwheel icon in the top right corner. A red number '2' points to the 'Settings' option in the dropdown menu that appears after clicking the cogwheel. Below the dashboard, the 'Settings' configuration page is shown. A red number '3' points to the 'Title' field, which is set to 'Custom Board'. A red number '4' points to the 'Project' section, where 'Follow Global Project Setting' is selected. A red number '5' points to the 'Type' dropdown menu, which is set to 'User Story'. A red number '6' points to the 'Swimlanes' section, where 'Owner' is selected. A red number '7' points to the 'Save' button at the bottom right of the settings page.

Creating Rally Dashboards

1. Expand to full screen

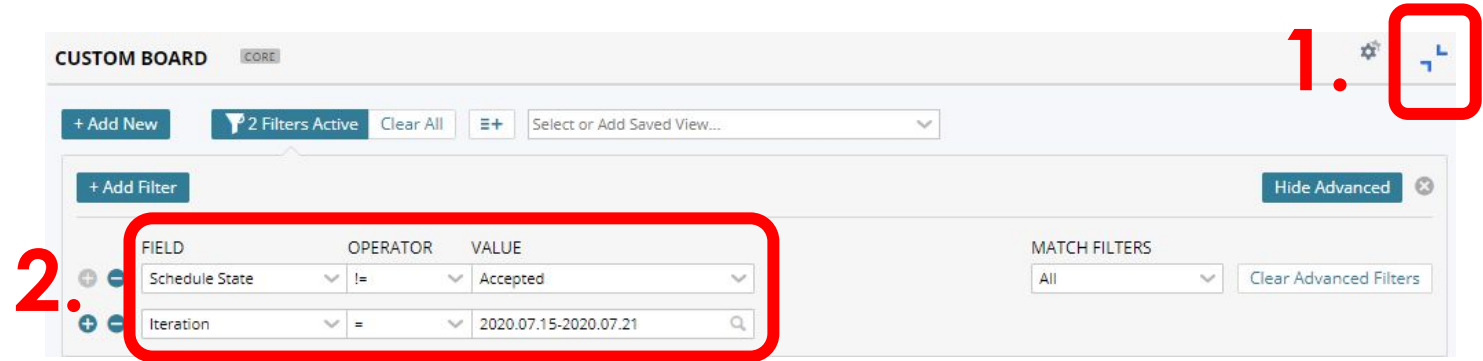
2. Go to Advanced Filters

a) Scheduled State != Accepted

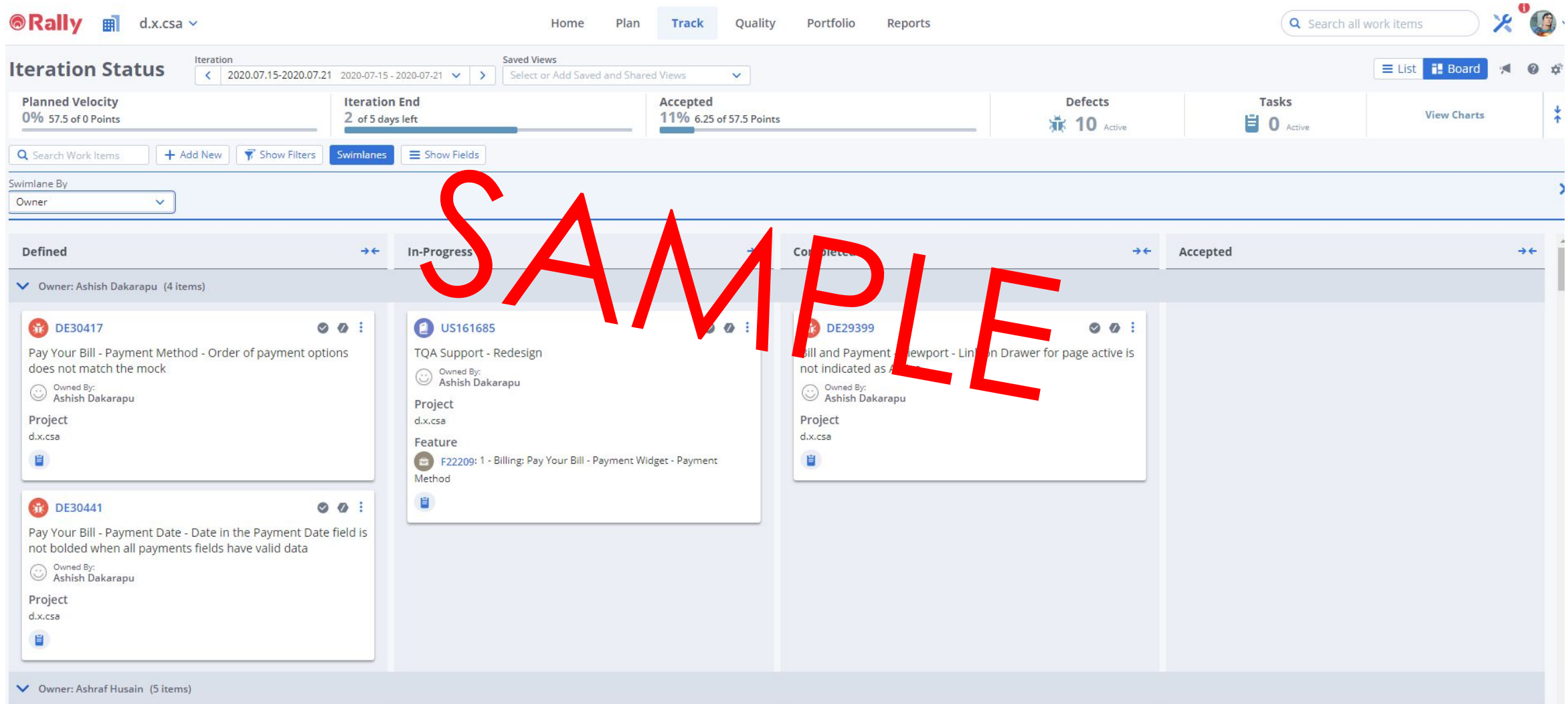
b) Iteration = Current

3. How would you see how many User Stories have not started

(hint - what Scheduled State would the be)



Other Boards - Iteration Status



The screenshot displays the Rally Team Board interface. At the top, there's a navigation bar with 'Home', 'Plan', 'Track' (active), 'Quality', 'Portfolio', and 'Reports'. A search bar on the right says 'Search all work items'. The left sidebar shows 'Team Board' and 'Add Flow State' tabs. The main area is a Kanban board with columns: 'Icebox', 'Backlog', 'In-Progress', 'Completed', 'Accepted', 'In Production', and 'Cancelled'. Each column has a 'Mapped Schedule State' dropdown (all set to 'Defined') and a 'WIP Limit' input (all set to '∞'). Below these are 'Exit Agreement' text boxes containing various statuses. A large red 'SAMPLE' watermark is centered over the board. At the bottom, there are 'Discard' and 'Save' buttons.

Other Boards - Team Board

The screenshot displays the Rally Team Board interface. At the top, the Rally logo and user profile 'd.x.ace' are visible. Navigation tabs include Home, Plan, Track (selected), Quality, Portfolio, and Reports. A search bar for 'Search all work items' is on the right. Below the navigation, the 'Team Board' section shows a 'Saved Views' dropdown and buttons for '+ Add New', 'Hide Filters', 'Swimlanes', and 'Show Fields'. A filter bar with 'Field', 'Operator', and 'Value' dropdowns is present, along with '+ Add Filter' and 'Clear Filters' buttons. The main area is divided into columns representing different stages of the work item lifecycle: Icebox (4/00), Backlog (1/00), In-Progress (0/00), Completed (2/00), Accepted (1/00), In Production (81/00), and Cancelled (8/00). Each column contains work items with details such as ID, description, owner, type (Feature, Iteration), and dates. A large red 'SAMPLE' watermark is overlaid across the center of the board.

Team Board

Saved Views
Select or Add Saved and Shared Views

Search Work Items + Add New Hide Filters Swimlanes Show Fields

Field Operator Value

+ Add Filter Clear Filters

Switch to Quick Filters

Board Charts

Show Exit Agreements

Owner: Adam Nichols (70 items)

Icebox 4/00

- US149673: Identify all column values
Owned By: Adam Nichols
Feature F29461: ACE 10% Improvement Scorecard
Iteration 2020.04.08-2020.04.14
- US150121: Create Defect Flow Chart in Visio with steps and questions
Owned By: Adam Nichols
Feature F29539: Defect Management

Backlog 1/00

- US149700: Work with Agility Health to set up DISH-specific presentation
Owned By: Adam Nichols
Feature F29473: Agility Health Remote Assessment Presentation
Iteration 2020.04.08-2020.04.14

In-Progress 0/00

- US149565: Review proposal with MNO
Owned By: Adam Nichols
Feature F29459: Build out wireless workspace
Iteration 2020.04.08-2020.04.14
- US149666: Update Roles / Responsibilities
Owned By: Adam Nichols
Feature F29452: Update ACE Playbook
Iteration 2020.04.08-2020.04.14

Completed 2/00

- US149668: Create a cadence Matrix
Owned By: Adam Nichols
Feature F29452: Update ACE Playbook
- US149669: Update Glossary
Owned By: Adam Nichols
Feature F29452: Update ACE Playbook

Accepted 1/00

- US149564: Review proposal with CXO
Owned By: Adam Nichols
Feature F29459: Build out wireless workspace
Iteration 2020.04.08-2020.04.14

In Production 81/00

- US109252: Upload all ACE Training Material to ACE site
Owned By: Adam Nichols
Feature F21008: Update and upload all ACE Training Material
Iteration 2019.05.08 - 2019.05.14
- US108864: Validate Average Days in State
Owned By: Adam Nichols
Feature F19456: Update display on current Rapid Deployment Dashboard

Cancelled 8/00

- US24941: Create an Agile/Rally assistance site for questions
Owned By: Adam Nichols
Feature F4590: Communication
- US109063: June ACE Newsletter
Owned By: Adam Nichols
Feature F20979: ACE Monthly Newsletter
Iteration 2019.05.29 - 2019.06.04

Other Boards - Iteration Efficiency

