

User Guide

For Sellegi ACT 3.3.1-Beta

This is the user guide for Sellegi ACT 3.3.1-Beta

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Starting to use Sellegi ACT

URL for Sellegi ACT

The Sellegi ACT main entry page can be found at the following URL:

- <server>:<port>/act

As an example, if we know that:

- The server can be found at <https://www.mycompany.com>
- The port is 7443

Then, the URL to access the main entry page of Sellegi ACT becomes:

1. <https://www.mycompany.com:7443/act>

The admin is also able to configure Sellegi ACT to be accessible without an explicit port, so you can access Sellegi ACT as <https://www.mycompany.com/act>

Logging in

Prerequisites for logging in:

1. The administrator has created a user with a name and a password, and that user has been associated with a role in Sellegi ACT.
2. The user has been associated with one or several programs in Sellegi ACT. (The administrator or a program owner can do this, by creating a team member in a program with the same name as the user.)

To log in, click on the *Not logged in* button in the toolbar at the top of the page, and select the *Login...* menu choice.

Enter the user name and password (that you have received from the Sellegi ACT administrator at your company) on the *Welcome to Sellegi ACT!* page that appears.

The overview page

The Overview page gives an overview of the current program.

Once you have logged in, you can navigate to the *Overview* page by clicking on the *Overview* button in the toolbar at the top of the page.

If you have not yet selected which program to work on, select a program with the drop-down menu in the first white area in the menu bar. This drop-down menu can also be used to switch the program you want to work on.

Buttons in extra toolbar

The extra toolbar on the *Overview* page has the following buttons:

1. **Refresh page**

2. Overview options

- Use this button to decide the date range used in the *Cumulative flow diagram* and *WIP & Lead time widgets*.

3. Capture screen

- Use this button to paste a picture of the current Sellegi ACT web page in another program.
 - i. In Sellegi ACT, copy the image shown on the *Screen capture* page with your web browser.
 - ii. For the image to appear in for instance *Microsoft Word*, you have to use Paste special in *Microsoft Word*, and paste the copied image as a bitmap.

Widgets on the overview page

On the *Overview* page, we can find the following widgets:

1. Filters

- Use this widget to limit the scope of the information presented on the page, to for instance only show elements associated with a specific release.

2. Releases

- **Without a release filter**, the *Releases* widget shows all releases, how many features there are in each release, and status for features in each release. The top of the widget indicates how epics are associated with one or several releases.
 - To focus the *Releases* widget on one release, select a release in the *Filters* widget, or click on a bar representing a release in the *Releases* widget.
- **With a release filter**, the *Releases* widget shows how many epics, features, work packages and test packages that are associated with the release specified by the filter. Color is used to indicate status for all elements contained in a bar.
 - Click on a bar to navigate to a status board focused on the elements that the bar represents.

3. Status colors

- This widget is a legend for status colors used in other widgets.

4. Not yet planned or Traceability

- **Without a release filter**, this widget is called **Not yet planned** and shows epics and features that are not yet associated with any release.
- **With a release filter**, this widget is called **Traceability** and shows if elements in the selected release are associated with other elements or not.
 - A green happy face indicates that all elements of the row type are associated with at least one element of the column type.

- A yellow neutral face indicates that some but not all elements of the row type are associated with at least one element of the column type.
- A red sad face indicates that none of the elements of the row type are associated with at least one element of the column type.

Click on a yellow neutral face or red sad face to see the row type elements in the selected release that are not associated with any elements of column type.

5. Cumulative flow diagram

- This widget shows how statuses for work packages have evolved over time.
- If you are using a filter, you can use the *Overview options* button in the extra toolbar to adjust the date range used in the Cumulative flow diagram.

6. Risks

- This widget shows if there are errors, warnings or informational messages for any elements, i.e. if there are any inconsistencies in the program (for the elements that passes the current filter).
- Click on a bar, to see errors, warnings or informational messages.

7. WIP & Lead time

- This widget is a companion to the *Cumulative flow diagram* widget, and shows additional information for each point in time:
 - **WIP:** Work in progress. How many work packages which at that point in time was in a status considered to be "in progress" (with the default configuration, status values in progress (=implementation is ongoing) and implemented (=implemented but not yet tested) are considered to be "in progress").
 - **Lead time:** The average number of days it took for work packages that were finished today (=status was set to done) to complete (=the average duration between when the work package status was set to in progress and when the work package status was set to done). If no work packages were finished today, the lead time from yesterday is reused.

The edit page

The Edit page is a good starting point if you want to edit elements (like features, work packages and stories) in the program.

Once you have logged in, you can navigate to the *Edit* page by clicking on the *Edit* button in the toolbar at the top of the page.

If you have not yet selected which program to work on, select a program with the drop-down menu in the first white area in the menu bar. This drop-down menu can also be used to switch the program you want to work on.

Widgets on the edit page

On the *Edit* page, we can find the following widgets:

1. Filters

- Use this widget to limit the scope of the information presented on the page, to for instance only show elements associated with a specific release.

2. Element types

- Use this list of element types to select one or two elements types that you want to work with.

3. Elements (or one element type name)

- This widget contains a list of elements, when one element type is selected in the *Element types* widget.
- Use the buttons at the bottom of the widget to:
 - i. Plus button: Add one element of the selected element type.
 - ii. Pen button: Edit properties for the selected element.
 - iii. Trash bin button: Delete the selected element.

4. To do

- This widget contains a list of things that you might want to do.
- Click on a link to go to the page where the task can be done.
- Click on the checkbox before the task to indicate that the task has been done.

5. Operations

- This widget shows operations that can be done, once you have selected one or several element types in the *Element types* widget.
- Click on a link to go to the page where the operation can be done.

Tasks on the edit page

The default configuration of the To do list contains the following tasks:

1. Decompose epics into features

Clicking on this link will take you to an association board, with epics in the heading and features in the content area.

2. Rank features

Clicking on this link will take you to the feature ranking board.

3. Assign features to releases

Clicking on this link will take you to an association board, with releases in the heading and features in the content area.

4. Associate sprints with releases

Clicking on this link will take you to an association board, with releases in the heading and sprints in the content area.

5. Decompose features into work packages

Clicking on this link will take you to an association board, with features in the heading and work packages in the content area.

6. Define dependencies between work packages

Clicking on this link will take you to an association board, with work packages both in the heading and in the content area.

7. Assign work packages to teams

Clicking on this link will take you to an association board, with teams in the heading and work packages in the content area.

8. Assign work packages to sprints

Clicking on this link will take you to an association board, with sprints in the heading and work packages in the content area.

9. Decompose work packages into stories

Clicking on this link will take you to an association board, with work packages in the heading and stories in the content area.

Operations on the edit page

As default, we have the following operations in the *Operations* widget on the *Edit* page:

Epic operations

1. Decompose Epics into Features

- Clicking on this link will take you to an association board, with epics in the heading and features in the content area.

2. Rank Epics

- Clicking on this link will take you to the epic ranking board.

3. Show priority board for Epics

- Clicking on this link will take you to the epic priority board.

4. Show Calculated status for Epics

- Clicking on this link will take you to the epic status board.

Feature operations

1. Decompose Features into Work Packages

- Clicking on this link will take you to an association board, with features in the header and work packages in the content area.

2. Rank Features

- Clicking on this link will take you to the feature ranking board.
- 3. Show priority board for Features**
 - Clicking on this link will take you to the feature priority board.
 - 4. Show Calculated status for Features**
 - Clicking on this link will take you to the feature status board.

Work package operations

- 1. Decompose Work Packages into Stories**
 - Clicking on this link will take you to an association board with work packages in the header and stories in the content area.
- 2. Show associations between Work Packages**
 - Clicking on this link will take you to an association board with work packages both in the header and in the content area.
- 3. Show priority board for Work Packages**
 - Clicking on this link will take you to the work package priority board.
- 4. Edit status for Work Packages**
 - Clicking on this link will take you to the work package status board.

Test package operation

- **Show priority board for Test Packages**
 - Clicking on this link will take you to the test package priority board.
- **Edit Status for Test Packages**
 - Clicking on this link will take you to the test package status board.

Story operation

- **Show priority board for Stories**
 - Clicking on this link will take you to the story priority board.
- **Show status for Stories**
 - Clicking on this link will take you to the story status board.

Requirement operation

- **Show priority for Requirements**
 - Clicking on this link will take you to the requirement priority board.
- **Edit Status for Requirements**
 - Clicking on this link will take you to the requirement status board.

Defect operation

- **Show priority board for Defects**
 - Clicking on this link will take you to the defect priority board.
- **Show severity board for Defects**
 - Clicking on this link will take you to the defect severity board.
- **Edit Status for Defects**
 - Clicking on this link will take you to the defect status board.

Operations for several selected element types

When two or more element types are selected in the *Element types* widget (by clicking check boxes in the upper-right corner of element type symbols), you will get operations with names like:

- Show associations between <element type A>s and <element type B>s
- Associate <element type A>s with <element type B>s
- Show Calculated status for <element type A>s and <element type B>s

For instance:

- **Show associations between Work Packages and Sprints**
 - Clicking on this link will take you to an association board, with sprints in the heading and work packages in the content area.

Association boards

Association boards are used to show and edit associations between elements of different types (and sometimes also of the same type).

To open an association board, you can do something similar to the following steps:

1. In the status bar, click on the *Edit* button.
2. On the *Edit* page, select the two (or more than two) element types that you want to work with in the association board, by clicking in the check-box in the top-right corner of each involved element type symbol. In our case, we select work package and sprint.
3. Click on the *Show associations between Work Packages and Sprints* link in the *Operations* widget.

Buttons in the extra toolbar for association boards

The extra toolbar for an association board has the following buttons:

1. Show filters

- Click on this button to change the filter used for elements in the association board.

2. Filter on status

- Click on this button to filter elements in the association board based on their status values. For instance, to reduce the number of visible elements, you might want to hide elements having status *Not Set*, *Deferred* or *Rejected*.

3. Display options

- This button is only visible if it is possible to switch between direct and indirect associations in the current board.
- Click on this button to decide if direct and/or indirect associations should be shown.

4. Flip board/Select element type for board heading

- For another view of the same set of associations, click on this button to select which element type should be in the header of the association board.

5. Sort header elements alphabetically/according to ranking

- Click on this button to switch between sorting the header elements according to ranking (default) and alphabetically.

6. Capture screen

- Use this button to paste a picture of the current Sellegi ACT web page in another program.
 - i. In Sellegi ACT, copy the image shown on the *Screen capture* page with your web browser.
 - ii. For the image to appear in for instance *Microsoft Word*, you have to use Paste special in *Microsoft Word*, and paste the copied image as a bitmap.

7. Create new... (Sprint)

- This button is only available if you are allowed to edit the association board.
- Click on this button to add a new element to the header. The association board will get a new column.

8. Delete selected element (Work Package)

- This button is only available if you are allowed to edit the association board, and if a content symbol is selected.
- Click on this button to delete the selected element both from the program.

The association board header

In the association board header, you will find the following column headers:

- **First column** (Not associated, Associated or All)
 - Click on the column header to show the buttons for this column:
 - **Create new...** (content element, for instance Work Package)
 - Click on this button to create a new work package in this column.
 - **Show all**
 - Click on this button to show both associated and unassociated content elements in the first column.
 - **Show associated**
 - Click on this button to only (in the first column) show content elements that are associated with a header element.
 - **Show not associated**
 - Click on this button to only (in the first column) show content elements that are not associated with a header element.
 - This is the default setting for the first column in an association board.

- **Filters are applied/Filters are not applied**
 - Click on this button to switch between filtering and not filtering the elements of the first column.
 - As default, filters are applied in an association board.
- **Other columns** (One column header for each header element)
 - Click on the column header to show the buttons for this column:
 - **Create new...** (content element, for instance Work Package)
 - Click on this button to create a new work package in this column.
 - The created work package will be associated with the header element.
 - **Show details ("i" in a circle)**
 - Click on this button to bring up a dialog with properties and relationships for the header element.
 - On the **Related elements** tab:
 - Click on the **Filter button** if you want to change the filter to focus on the main elements mentioned in the related elements tab.
 - Each related element has a **Board button**. Click on the Board button to go to an association board showing the association between the two elements.
 - **The "i" tooltip ("i" without a circle)**
 - To see the most important properties for the header element, bring up the "i" tooltip.
 - This image is not a button and cannot be clicked.
 - This image is only available if the most important properties have been filled in for this element.

The association board content area

Content elements that pass the current filter are placed in the content area of the association board.

- Content elements that are associated with a header element are placed in the header element column.
- Content elements that are not associated with a header element are shown in the *Not associated* column.
- A content element that is associated with several header elements is shown as several symbols (one in each column with an associated header element) in the association board.

The content element symbol

The symbol in a board content area representing an element has the following features:

1. The first text line indicates the element **type** (for instance Feature).

2. The second text line indicates the element **name**.
3. In *status boards* showing calculated status, the **progress bar** below the second text line indicates how much work remains on lower levels before the element will be moved to a better status column. For instance:
 - a. The status board (showing calculated status) places feature A in the *In Progress* column, since the three associated work packages have statuses *Done*, *In Progress* and *Done*. (*In Progress* is worst.) The *progress bar* for feature A is shown as 66% filled with green, since two out of three associated work packages have a better status than the calculated feature status.
4. The bottom line contains **buttons**:
 - a. **Breakdown** (looks like an organizational chart)
 - i. This button is only available if the element is a work item that has been broken down into smaller elements on a lower level. For instance: The element is a feature that is associated with two work packages.
 - ii. Click on this button to navigate to a status board showing the elements that this element has been broken down into.
 - b. **Show details ("i" in a circle)**
 - i. Click on this button to bring up a dialog with properties and relationships for the content element.
 - c. **"i" without a circle**
 - i. This image is only available if the most important properties have been filled in for this element.
 - ii. To see the most important properties for the content element, bring up the "i" without a circle tooltip.
 - iii. This image is not a button and cannot be clicked.
5. The symbol **color** indicates the status of the element.
 - a. We can use the *Status colors* widget on the *Overview* page as a status color legend in a separate browser window.
6. The most recently used (for instance moved) element has a **thick blue border**. This makes it easy to find the most recently used element even when switching between boards.

Creating associations with an association board

To associate a content element with one header element:

- Drag the content symbol from the first column to the column with the header element that the content element should be associated with.

To associate a content element with another header element:

- Drag the content symbol from the column with the header element it should no longer be associated with, to the column with the header element it should now instead be associated with.

To associate a content element with several header elements:

- Click on the *Not associated* column header (the first column header).
- Click on the *Show All* button in the column header.
- Drag the content symbol from the first column several times: Drag the content symbol one time to each header element the content symbol should be associated with.

To no longer associate a content element with a header element:

- Drag the content element from the header element column to the first column.

Creating associations between elements of the same type

We may want to indicate that work package A must be done before work package B is executed (and that work package B depends on the result of executing work package A), for instance to have work package A presented above (before) work package B in columns in boards. We can create a dependency between work package A and B to express this, in the following way:

1. In the status bar, click on the *Edit* button.
2. On the *Edit* page, make sure that the work package element type button is the only button that is selected in the *Element types* widget.
3. Click on the *Show associations between work packages* link in the *Operations* widget.
4. To express that work package A must be done before work package B, we should place a work package A content symbol in the work package B heading column.

After doing this, when we bring up a board where work package A and B are placed in the same column, work package A will be placed above (before) work package B.

Order of content elements in a column

The following factors determine the order of work item elements (like features and work packages) in the same column in a board:

1. Highest priority: **Technical dependencies** between work packages.
2. Medium priority: The **Ranking** property value.
3. Lower priority: The **Priority** property value.
4. Lowest priority: Alphabetical **Name** order.

As an example: If work packages in a column are not related with any technical dependencies, ranking property values are compared, to determine the order. For the group of elements that do not have a ranking property value (or for the group of elements that for some reason have the same ranking value), the priority property value is used instead, to determine the order.

Status boards

Status boards are used to show and edit status of elements.

To open a status board, you can do something similar to the following steps:

1. In the status bar, click on the *Edit* button.
2. On the *Edit* page, select the element type you want to work with in the status board. In our case, we select work package.
3. Click on the *Edit status for Work Packages* link in the *Operations* widget.

Buttons in the extra toolbar for status boards

The extra toolbar for a status board has the following buttons:

1. Show filters

- a. Click on this button to change the filter used for elements in the status board.

2. Filter on status

- a. Click on this button to filter elements in the status board based on their status values. For instance, to reduce the number of visible elements and columns, you might want to hide elements having status *Not Set*, *Deferred* or *Rejected*.

3. Display options

- a. Click on this button to decide if manual or calculated status should be shown.
 - i. **Manual status** is the status that was entered specifically for this element in the property dialog.
 - ii. **Calculated status** is the aggregated and potentially propagated status of associated elements. The worst status of this element's status (if it has any status of its own) and incoming and propagated statuses from associated elements is used as the calculated status. Status values are only propagated in one direction, and the administrator can configure if all or only bad statuses should be propagated.
Example (valid for a default configuration):
 1. A feature (with no manual status) is associated with two work packages (with status *In Progress* and *Implemented*). The calculated status of the feature becomes *In Progress*, since status is propagated from work packages to features and since *In Progress* is a worse status than *Implemented*.

4. Capture screen

- a. Use this button to paste a picture of the current Sellegi ACT web page in another program.
 - i. In Sellegi ACT, copy the image shown on the *Screen capture* page with your web browser.

- ii. For the image to appear in for instance *Microsoft Word*, you have to use Paste special in *Microsoft Word*, and paste the copied image as a bitmap.

5. Create new... (Work Package)

- a. Click on this button to add a new element to the *Not Set* column. If you want to, you can give the new element a status by moving it to another column.

6. Delete selected element (Work Package)

- a. Deletes the selected element from not only the diagram, but also from the program.

Status board columns

In the status board header, you will find the following column headers:

- **First column: Not Set**
 - Elements in this column have no status value.
- **Other columns: New, In Progress...**
 - Elements in these columns have the status value indicated in the column header.

Changing the status value of an element

To change the status value of an element, move the element to the column representing the desirable new status value. If the element should no longer have a status value, move it to the *Not Set* column.

Question: **I cannot change the status value.** Why?

Answer:

- Variant 1: You are logged in with a user and team member combination that is restricted to read-only access to the elements in the status board. You have to either log in with another user, or ask the program owner or the administrator for **better access rights**, to be able to edit status values.
- Variant 2: There is an image of a locked **lock** after the status board title. This indicates that the status board is showing **calculated status**. This happens for instance when you navigate to a status board from the Overview page. Calculated statuses cannot be edited directly. You have to switch to a status board showing manual status. This can be done with the *Display Options* button in the extra toolbar for the status board.

However, the calculated status that you want to edit may come from another element. If this is the case, there is an "i" button on the *Calculated status* row. Look at the tooltip for the "i" button, to find out the source element. If you want to, you can navigate to the source element from the *Related elements* tab.

The content element symbol in status boards

See the general description of content element symbols in the chapter named "The content element symbol".

Ranking boards

Ranking boards are used to rank a group of elements of the same element type. The element type can for instance be feature or epic.

To open a ranking board, you can do something similar to the following steps:

4. In the status bar, click on the *Edit* button.
5. On the *Edit* page, select the element type you want to work with in the ranking board. In our case, we select feature.
6. Click on the *Rank features* link in the *Operations* widget.

Buttons in the extra toolbar for ranking boards

The extra toolbar for a ranking board has the following buttons:

1. Show filters

- a. Click on this button to change the filter used for elements in the ranking board.

2. Filter on status

- a. Click on this button to filter elements in the status board based on their status values. For instance, to reduce the number of visible elements and columns, you might want to hide elements having status *Not Set*, *Deferred* or *Rejected*.

3. Save ranking

- a. Click on this button to save the ranking shown in the ranking column as ranking property values for the elements in the ranking column.

4. Capture screen

- a. Use this button to paste a picture of the current Sellegi ACT web page in another program.
 - i. In Sellegi ACT, copy the image shown on the *Screen capture* page with your web browser.
 - ii. For the image to appear in for instance *Microsoft Word*, you have to use Paste special in *Microsoft Word*, and paste the copied image as a bitmap.

5. Create new... (Feature or Epic)

- a. Click on this button to add a new element to the *Unassigned* column. If you want to rank the new element, move the element to one of the columns between the two thick vertical lines.

Ranking board columns

In the status board header, you will find the following column headers:

- **First column: Unassigned**

- Elements in this column are not included when the ranking is calculated.

- **Input columns**

- Columns between the two thick vertical lines are called input columns, because we can specify the order of elements in these columns, as input values to the ranking calculation.
- The order of elements is determined by the symbol order.
 - The symbol order is as default specified by moving elements within a column.
 - As an alternative, an administrator can configure the symbol order to be specified by an appropriate property value.
 - The administrator can also configure how much weight each input column should have, by specifying a value between 0 and 100. As default, all columns have a weight of 100, which means that they have the same weight.
 - To see how a column is configured, look at the “i” tooltip in the input column header.
- **Value columns** are ordered from the highest value at the top to the lowest value at the bottom.
 - The **User value** column is intended to capture how much value there is for the user if this element is implemented, tested and delivered.
 - The **Time value** column is intended to capture how valuable it is to deliver this feature fast. The value of delivering a feature often decreases if it is delivered later, because of competitors coming out with similar products or the release of improved technology platforms.
- The **Cost** column is order from the highest cost at the top to the lowest cost at the bottom.

- **Last column: Ranking**

- In the Ranking column, elements are presented in calculated ranking order, with the element having the highest calculated ranking at the top.
- The **ranking calculation** is done in the following way:
 - A Fibonacci series (1, 2, 3, 5, 8, 13, 21...) is used to assign values for all elements in all input columns. The symbol at the bottom in a column is assigned the value 1. The symbol at the top in a column is assigned the largest value.
 - The value for an element in a column is multiplied by the column weight factor.
 - The weighted values for one element in all “Value” columns are added up to a “weighted value sum”.
 - The weighted value for one element in the “Cost” column is calculated as the “weighted cost”.

- A ranking score is calculated for the element, by dividing “weighted value sum” with “weighted cost”.
- The element with the highest ranking score is placed at the top of the *Ranking* column.
- To commit the order in the Ranking column as the new ranking of the elements, press the **Save ranking** button in the extra toolbar.
 - Before the ranking is saved, the new ranking is only visible in the Ranking board.
 - After the ranking is saved, the new ranking values will affect the order that elements are presented in, in columns in other boards.
- If the *Save ranking* button is pressed in the extra toolbar, the ranking property value is updated for all elements in the Ranking column.
 - The element at the top is given a ranking value of 1.
 - Elements with a lower position are given ranking values like 2, 3, 4, 5...

Changing the ranking of elements

To change the ranking of an element:

1. Make sure that the element is available in the input columns (the columns between the two thick vertical lines).
 - a. If the element is not yet available in the input columns, drag the element from the first column to one of the input columns.
2. Move the element up or down in each input column, to have the elements in that column ordered according to relative value or cost. Highest value or cost (depending on the column) should be at the top.
3. The ranking column order is recalculated each time an element is moved in an input column.
4. When the element order in the ranking column is ok (and all input columns have an appropriate order of elements), you can commit the ranking board order by pressing the *Save ranking* button in the extra toolbar. This updates the *Ranking* property value for all elements in the *Ranking* column.

Model elements and how they are associated

On the *Edit* page, the Element Types widget contains all the element types we can work with in Sellegi ACT. For a program with a default configuration, we have the element types listed in the sub sections below.

Work items

Work item element types are planning element types representing things that should be done (or have been done). The list below is sorted on work item size, with the largest work item at the top.

1. **An epic**

- ...is broken down into features.
- ...is often associated with several releases.

2. **A feature...**

- ...is broken down into work packages.
- ...is delivering its execution result to one release.

3. **A work package...**

- ...is associated with a team.
- ...is used for planning implementation activities.
- ...is delivering its execution result to one sprint.
- ...can be broken down into stories.

4. **A test package**

- ...is similar to a work package, but is used for planning testing activities instead of implementation activities.
- ...verifies the result of executing a work package or a feature.
- ...delivers the verification result to a sprint.

5. **A story...**

- ...is associated with a team member.
- ...is delivering its execution result to one sprint.

Things to work on

A project (or a program) is often creating an improved version of an existing product. The *Things to work on* element type group contains element types that are commonly used when we are working on a new or improved version of a product.

1. **A module** is a product part that related work items are creating or improving when they are executed.
2. **A requirement** is satisfied by executing an associated work item.
3. **A defect** is resolved by executing an associated work item. A defect can also be treated like a work item of type story.

Integration points

The *Integration points* element type group contains element types representing builds, deliveries or integration points.

1. **A release...**

- ...is intended for delivering a product version to stakeholders outside the project.
- ...is delivered less often than a sprint.

2. **A sprint...**

- ...is intended for delivering a product version for use and testing within the project only.
- ...is delivered more often than a release.

Workers

The *Workers* element type group contains element types that represent those that are working on work items.

1. A team...

- ...is working with a backlog of work packages (and test packages) intended for delivery to a sprint.
- ...can be associated with team members.

2. A team member...

- ...is working with a backlog of stories (and sometimes defects) intended for delivery to a sprint.
- ...can be a member of a team.

Status propagation

The common scenario is that status is set for work packages (or associated stories) and test packages. Status is then propagated and aggregated to other elements, based on how the elements are associated.

Status propagation direction for associations

Element status can be propagated (in one direction only) along certain associations. With a default configuration of the program, we have the following major status propagation directions:

1. Story -> Work package
2. Work package -> Feature
3. Work package -> Sprint
4. Work package -> Work package (but only for the "bad" status *Deferred*.)
5. Test package -> Sprint
6. Feature -> Epic
7. Feature -> Release
8. Team member -> Team

Status aggregation

If several status values are propagated to the same element (for instance, status is propagated from several work packages to one associated feature), the worst status is selected as the calculated status for the destination element.

With a default configuration, we have the following status values, sorted according to status severity, with the worst status at the top:

1. Deferred
2. New
3. In Progress
4. Implemented
5. Tested

6. Done
7. Not Set (not propagated)
8. Rejected (not propagated)

If we continue our example: If the work packages have status *In Progress* and *Done*, the calculated status of the feature becomes *In Progress*.

Manual status overrides calculated status

Note that status propagation can be stopped, by specifying a status value other than *Not Set* for the element that the status normally would be propagated to.

In our example, the feature got the calculated status *In Progress*, since one out of three associated work packages had status *In Progress*. The other work packages were *Done*, which is a better status. If we for some reason would like the feature to be reported as *Done*, we can:

- Alternative 1: Remove the association between the feature and the work package that is still *In Progress*. Now, since all remaining associated work packages are *Done*, the calculated status of the feature will also be *Done*.
- Alternative 2: For the feature, set the *Status* property value to *Done*.
 - This will override the status that is normally propagated to the feature.
 - A warning message will be issued: Explicit status value prevents status propagation: Feature "A" (Done) is implemented by Work Package "B" (In Progress).

Creating a new program

The administrator of Sellegi ACT has configured Sellegi ACT users. These users can log in to Sellegi ACT. In Sellegi ACT, as a user we can:

- Alternative 1: **Open an existing program** that we have access to, by clicking on the *Overview* or *Page* button in the main toolbar.
- Alternative 2: **Create a new program**, by:
 - Clicking on Settings > Administration > Programs.
 - Clicking on the plus button.
 - Giving the new program a unique name in the dialog that appears.
 - Clicking on the *Page* button in the main menu bar to start using the program.

When we create a new program, a team member with our name is automatically added to the program. The *Category* property of our team member is set to "(owner)", to indicate that we are a **program owner**. A program owner is like an administrator for the program. This means that in addition to the things that a normal team member can do in a program, a program owner can also add, edit and remove team members in the program. A Sellegi ACT user can only access a

program if there is a team member in the program with the same name as the Sellegi ACT user's name.

When the program owner specifies who should have access to the program by adding team members for a program, these team member properties are important: (Only program owners and administrators can update team member properties.)

- **Category**
 - Set the *Category* property to "(owner)", to indicate that another team member than you also should be able to act as a program owner in this program.
- **Edit filter**
 - To restrict what the team member can edit, we can specify an edit filter. The edit filter has the same capabilities as the main filter. We can for instance configure that a team member should only be able to edit elements related to release A and team B, by setting the Edit filter property value to "release=A, team=B".
- **View filter**
 - To restrict what the team member can view (and edit), we can specify a view filter. The view filter is specified in the same way as the edit filter.

Filter to focus on important elements

Filters are used to limit the number of elements visible in lists and boards, to make it easier to focus on the elements that we consider important at this point in time.

As a normal Sellegi ACT user, you can use the following filters:

- **The main filter**
 - The main filter is available on most pages, either directly in the *Filters* widget or in a dialog that pops up when the *Show filters* button in the extra toolbar is pressed.
 - Select for instance release A and team B, to limit elements in lists and boards to elements associated with both release A and team B.
 - Remove the selection in the filter, to view all elements again.
- **The status filter**
 - In boards, it is possible to click on the *Filter on status* button, to specify a status filter for the board. As default all elements are shown. We might want to hide elements with status Not Set and Rejected in for instance a sprint – work package association board.
- **The time filter**
 - The time filter is useful when we want to hide elements related to all old releases or sprints.

- The time filter is behind the scenes saved as a team member property for the currently logged in user.
- To edit the time filter, select *Settings > Preferences > Time filter* (in the main toolbar).
- Specify the release or sprint that should be the first release or sprint that should remain visible. Other element types are also filtered, based on their relationship with the release or sprint specified in the time filter.
- The time filter uses the alphabetical order of sprint names to determine the order sprints are executed.
- For instance, we have sprint A associated with work package A, and sprint B associated with work package B. If we set the time filter to sprint B:
 - Sprint A will not be visible, since sprint A is older than sprint B.
 - Work package A will not be visible, since it is associated with sprint A that was hidden by the filter.

Error and warning messages

Sellegi ACT highlights inconsistencies in the program by producing error or warning messages.

- On the *Overview* page, the *Risks* widget indicates how many errors and warnings there is in the program.
 - Click on the Error or Warning bar, to get a list of errors or warnings.
 - In the list, click on element names to see the properties for an element.
 - Many messages are about two elements. If the two elements are directly related, we can click on the *Related elements* tab in the dialog, identify the row with the other element, and click on the board button, to see both elements in an association board.
- In a diagram, symbols indicate if a content element has an error or warning message by including a warning triangle in the symbol button row. The warning triangle tooltip shows the message.

A program with a default configuration can for instance produce the following messages:

1. Feature "A" delivers to Release "C", but could deliver to Release "B" based on associated Work Package and Test Package deliveries.
2. Status inconsistent with dependency: Work Package "B" (Done) depends on Work Package "A" (In Progress)
3. Work Package "B" depends on results from Work Package "A" that is also delivering to Sprint "C".

4. Direct impact on product part (Module) from several teams ("A", "B") within the same sprint ("C").

Menu choices

In the main toolbar, we have the following buttons, menu choices and controls:

- **Home:** This button navigates to the Sellegi ACT welcome page.
- **File**
 - **Import from Excel:** With this menu choice, we can import Excel documents if they are formatted in a the following way:
 - The first row may be a header, describing which property each column represents.
 - All other rows represent one element each, with the property values specified in each column.

In the **first dialog, select** the *.xls **file** that should be imported. (Save *.xlsx files as *.xls before importing.) Press the "next" button.

In the **second dialog**, the first alternative is to **specify** which **element type** you would like to use in Sellegi ACT for the imported elements, and press "next". If you have saved an Excel import profile earlier, a second alternative is to **select the Excel import profile** instead of configuring the import from scratch each time. If you select a profile, the actual import is started when the "next" button is pressed, without showing the third dialog.

In the **third dialog, map** the Sellegi ACT **properties** that you want the import operation to fill in to an Excel column, and indicate if the first Excel row is a heading (and should not be imported) or if it is not a heading (and should be imported). Note that you must map the Sellegi ACT *Name* property before pressing "next" to do the actual import. Also, before pressing "next", consider pressing "save" to save an Excel import profile, to use the same settings for a future import.

- **Import from XML:** As an administrator, you can use this menu choice to import a Sellegi ACT program that has been saved as XML.
- **Export to XML:** As an administrator, you can use this menu choice to save a Sellegi ACT program as an XML file.
- **Import from Jira:** With this menu choice, we can import issues from Jira projects, if the administrator has configured Sellegi ACT for use with Jira. In the dialog that appears, specify the Jira profile you want to use, as well as a Jira user name and password that has access to the Jira project of interest.
- **Export to Jira:** With this menu choice, we can create issues in Jira projects for Sellegi ACT elements, if the administrator has

configured Sellegi ACT for use with Jira. In the dialog that appears, specify the Jira profile you want to use, as well as a Jira user name and password that has access to the Jira project of interest.

- **Import from RTC:** With this menu choice, we can import elements from Rational Team Concert project areas, if the administrator has configured Sellegi ACT for use with RTC. In the dialog that appears, specify the RTC profile you want to use, as well as an RTC user name and password that has access to the RTC project area of interest.
- **Export to RTC:** With this menu menu choice, we can export elements to Rational Team Concert project areas, if the administrator has configured Sellegi ACT for use with RTC. In the dialog that appears, specify the RTC profile you want to use, as well as an RTC user name and password that has access to the RTC project area of interest.
- **Import from RRC:** With this menu choice, we can import elements from Rational Requirements Composer project areas, if the administrator has configured Sellegi ACT for use with RRC. In the dialog that appears, specify the RRC profile you want to use, as well as an RRC user name and password that has access to the RRC project area of interest.
- **(Print...)**
 - This menu choice is currently not available. Printing a Sellegi ACT web page directly with the web browser Print menu choice will sometimes not give you a satisfactory printout. If you find yourself in this situation, you should try using the **Capture screen** button that is available on most Sellegi ACT web pages in the extra toolbar. Print or copy the image that is shown in the Screen capture dialog that appears. (If you paste in for instance Microsoft Word, use Paste special to paste the copied image as a bitmap.)
- **Administrate:** This button is available mainly for administrators but also for program owners (which to some degree can administrate their own programs). This button takes us to the *Administration* page, with the following sections:
 - **Programs:** Add, edit and remove programs.
 - **Users:**
 - Import user settings from an LDAP server.
 - Define Sellegi ACT user name, password and role manually.
 - Sellegi ACT roles:
 - actadmin: An administrator that can do everything.
 - actmember: A normal user that can update information in programs they have access to.
 - actuser: A user that only can view information in programs they have access to.

- **Team Members:** Associate Sellegi ACT users with programs, by creating team members with the same name as the user in appropriate programs.
- **Ranking boards:** Configure how ranking boards should work:
 - Number, name and order of input columns (=Cost or Value columns).
 - How the column should determine values: By symbol order or property value.
 - Weight of the column.
- **JIRA integration:** (Available if Sellegi ACT has been configured for use with Jira) Create, edit and delete JIRA profiles. Download and upload the ACT – Jira mappings file.
- **RTC integration:** (Available if Sellegi ACT has been configured for use with RTC) Create, edit and delete RTC profiles. Download and upload the ACT – RTC mappings file.
- **Overview:** This button takes us to the *Overview* page. Read more about this in the section named “The overview page”.
- **Select program** drop-down menu: Switch between the existing programs that are available for your Sellegi ACT user.
- **Edit:** This button takes us to the *Edit* page. Read more about this in the section named “The edit page”.
- **User** drop-down menu:
 - **Preferences:** This menu choice brings up a page with these sections:
 - **Editing:** Specify if you want the property dialog to auto-appear immediately after you have created an element or not.
 - **Time filter:** Set a personal time filter for the current program. Read more about the time filter in the section called “Filter to focus on important elements”.
 - **Edit account:** Edit properties for your Sellegi ACT user.
 - **Logout/Login:** Use this menu choice to log out of (or log in to) Sellegi ACT.
- **Search:** The **basic search** works in the following way: Type a search text, and press the first search button. A dialog appears, listing all elements where the search text could be matched with the element name or any other property. The tooltip for each element in the Match column describes the name or property that matched.
 The **advanced search** works in the following way: Press the second search button, to bring up the dialog. In the dialog, you can specify a search text as for basic search if you want to, but you can also search for changes done after a certain point in time (like after the previous baseline or meeting), before a certain point in time or between two points in time. You can also restrict the search to only match elements modified by a certain team member, by specifying the team member name.

- **Help**

- **About Sellegi ACT:** Use this menu choice if you want to see the Sellegi ACT version and build numbers. You can also see the Sellegi ACT license, and third party licenses for software that is included in Sellegi ACT.

Tricks and tips

Minimize board size

To view as many symbols in a board as possible without scrolling, you might consider temporarily changing the browser scale to for instance 90%.