Getting Started with Epics

This tutorial is intended to get ScrumWorks Pro users up and running with Epics, a feature available as of ScrumWorks Pro 4. Epics provides a way to group work items and decompose features within the context of a release milestone. Once a release milestone has been defined with start and end dates, there is often a need to specify the major sub-goals or feature goals of that milestone. This is where Epics comes into play; it provides a clear way to indicate major goals of a release cycle.

| Solitaire games: Product Backlog		
		Release Planner
Key	Uncommitted Backlog Items/Tasks	Backlog Effort
	☐ 2.0 (Card Games)	Total: 143
Sol-64	☐ [Archway, **Dealing**] Only top most tableu card can be moved	4
Sol-14	☐ [Pyramid, Variation,...] 3 from stack - Cycle when deck is complete	1
Sol-47	☐ [Monte Carlo, Row St...] Addition of new cards ends when reserver cards are exhau...	4
Sol-86	☐ [Defects, Yukon, **Dea**...] Move Single cards	4
Sol-111	☐ [**Persistence**] Addition of new cards ends when reserver cards are exhausted	1
Sol-54	☐ [Archway, Row Stacks] Play Area card placement	4
Sol-105	☐ [**Animation, Persiste**...] Play area card arrangement	8
Sol-114	☐ [**Play Area**] Empty Tableau can be used for any card	1
Sol-110	☐ [**Persistence**] Lay Fresh cards	2
Sol-16	☐ [Pyramid, Variation] Seven Cards below pyramid usability	2
Sol-84	☐ [Yukon, **Persistence**] Tableu pile order - alternating colors	4
Sol-88	☐ [Variation, Yukon, P...] Fill empty piles - only King	4
Sol-97	☐ [Variation, Yukon, P...] Fill empty piles - Any card	8
Sol-115	☐ [**Play Area**] Tableau Play Area placement	8
Sol-116	☐ [**Play Area**] Move cards from tableu to foundation	2
Sol-117	☐ [**Play Area**] Move cards from reserve piles to foundation	8
Sol-104	☐ [**Play Area**] Tableu Definition	2

This tutorial will make use of an example domain to illustrate these concepts. The fictitious scenario is a game development company that authors a Solitaire game. The release date for version 2.0 of the Solitaire game has been set as October 31, 2009.

In this example, the Solitaire release planners would like to focus the 2.0 milestone on three main areas of work: Archway, Row Stacks, and Pyramid. To accomplish this in ScrumWorks Pro, the release planners define a Release with an end date of October 31, 2009 and then add three Epics to the release corresponding to the three areas of focus.

Solitaire games: Release Planner			
Key	Backlog Items by Release/Epic	Backlog Effort	Status
	☐ 2.0 (Card Games) 1/1/2009 - 10/31/2009	Total: 308	
	⊞ 📁 Archway	Total: 49	
	☐ 📁 Pyramid	Total: 21	
Sol-13	[Variation] Draw 3 from stack	4	Done
Sol-15	[Variation] Seven cards below pyramid placement	2	Done
Sol-11	[**Persistence**] Game Start settings window	4	In Progress
Sol-12	[**Persistence**] Game start settings options	8	In Progress
Sol-14	[Variation, **Bug**] 3 from stack - Cycle when deck is complete	1	Not Started
Sol-16	[Variation] Seven Cards below pyramid usability	2	Not Started
	☐ 📁 Row Stacks	Total: 51	
Sol-19	[Klondike] Initial Setup screen graphic	4	Done
Sol-22	[Klondike] 4 Foundation Pile Functionality	2	Done
Sol-81	[Yukon] Foundation Suit Verification	2	Done

The Epics feature is based on the existing concept of Themes. Themes are essentially keyword "tags" that can be added to work items in the product backlog. Multiple Themes can be applied to a single item and, in this way, Themes provide a flexible organization mechanism useful in filter views and reports.

In our example, the Solitaire game has more than a dozen Themes available for use. While a dozen-plus Themes exist, not all Themes will be selected as formal goals in the 2.0 milestone. The release planners therefore use Epics to focus the release milestone on just the three target Themes.
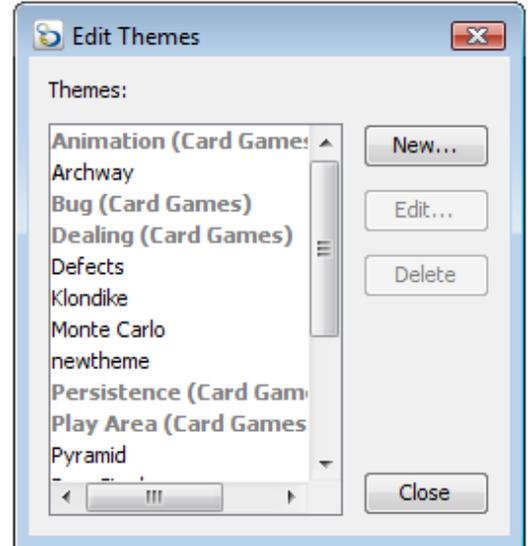
Epics is based on Themes in ScrumWorks Pro since work items in the backlog already make use of Themes. Once a release planner sets up a new Release milestone, complete with dates, Epics can be associated to the Release. An Epic is defined by selecting an existing Theme or defining a new Theme. In this way, all work items in the Release backlog associated to this Theme will automatically be grouped into the new Epic. This is done using the Release Editor.

To add an Epic to a Product Release:

Double-click a Release row in either the Product Backlog frame or the Release Planner frame. In the resulting Edit Release frame, Epics are listed in a table within the Epics tab.
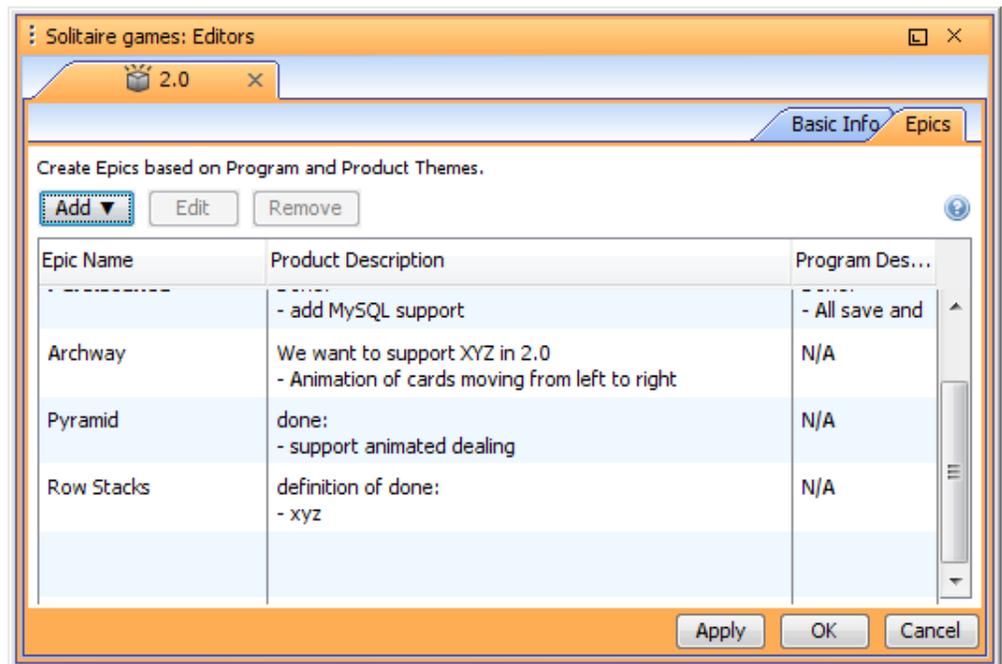
Click the "Add" button and, in the resulting "Add Epic to Release" dialog, select the Theme on which the Epic will be based from the dropdown menu. New Themes may be created here by clicking the "New Product Theme" button.
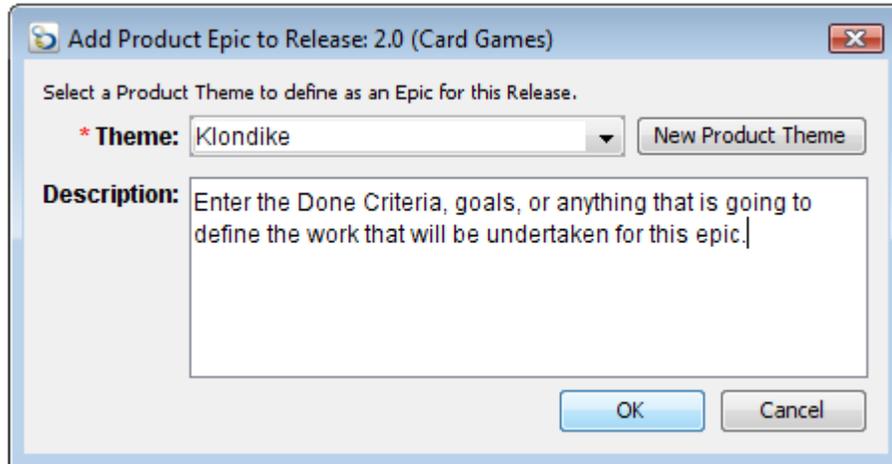
Click "OK" in the dialog to add the Epic.

Only one Epic may be added per Theme in a Release. All changes made will be saved by clicking "OK" or "Apply" at the bottom right side of the Edit Release dialog. Clicking "Cancel" will discard all changes made since opening the Edit Release dialog.

Once the Epics have been defined in the Release Editor, the release planners need an interface to decompose Epics and track progress. This happens in the "Release Planner" view, new as of ScrumWorks Pro 4.

The Release Planner frame is not visible by default and must be opened from the View menu or by clicking the "Release Planner" button from the Product Backlog frame.

As Backlog Items associated with Epics are added to the Release, Effort estimates and progress toward completion are reflected in the columns on the following page.

Backlog Effort column:

- For Releases: Displays the total of all Effort Estimates in the Release.

- For Epics: Displays the sums of the estimates for all Backlog Items contained by the Epic.

- For Backlog Items: Displays the Effort Estimate for Each Backlog Item

In the status bar for all rows (except PBIs), a vertical line expresses the theoretical percentage of effort units that should be done for the time elapsed in the Release, assuming work was completed at an even rate throughout the Release and all scheduled work would be complete by the Release end date. Releases without start and end dates will not display this line.

Status column:

- For Releases: Displays a bar indicating the ratio of effort units completed to those not yet completed in the entire Release.

- For Epics: Displays a bar indicating the ratio of effort units completed to those not yet completed within each Epic.

- For Backlog Items: Displays the status of the individual PBI in four states.

The Release Planner view is organized first by Release, then by Epic. This gives Release planners the opportunity to populate Epics with new work items and see overall progress using the Status column's roll-up progress indicators.

Managing Backlog Items:
Managing Backlog Items in the Release Planner frame is similar to doing so in the Product Backlog and Sprints by Team frames, with the following notable differences:
1. When adding Backlog Items to an Epic, the new Backlog Item automatically inherits the Theme on which the Epic is based;
2. When adding a Backlog Item to a Release via the Release Planner, the new Backlog Item appears at the bottom of the Release in the Product Backlog frame;
3. Since Tasks are not reflected here, no Tasks may be created for Backlog Items in the Release Planner frame;
4. Similarly, no Tasks may be created from within a Backlog Item editor that was opened from the Release Planner frame; and
5. Drag and Drop is not available in the Release Planner frame.

Once the Release milestone is underway and teams are making headway, real-time Epic progress is always visible from the Release Planner view. The Status column houses roll-up progress indicator bars for Epics and Releases, indicating the progress of each. The overall length of the bar indicates the total number of backlog effort units in each Release and Epic, depending on context. As the team completes Backlog Items, the progress bar advances from left to right until all the items are done.

The Epic Progress Report is located in the Reports menu. It provides stakeholders with a progress report on all selected Epics for a given Release. This at-a-glance report provides real-time status on how far each individual Epic has progressed.
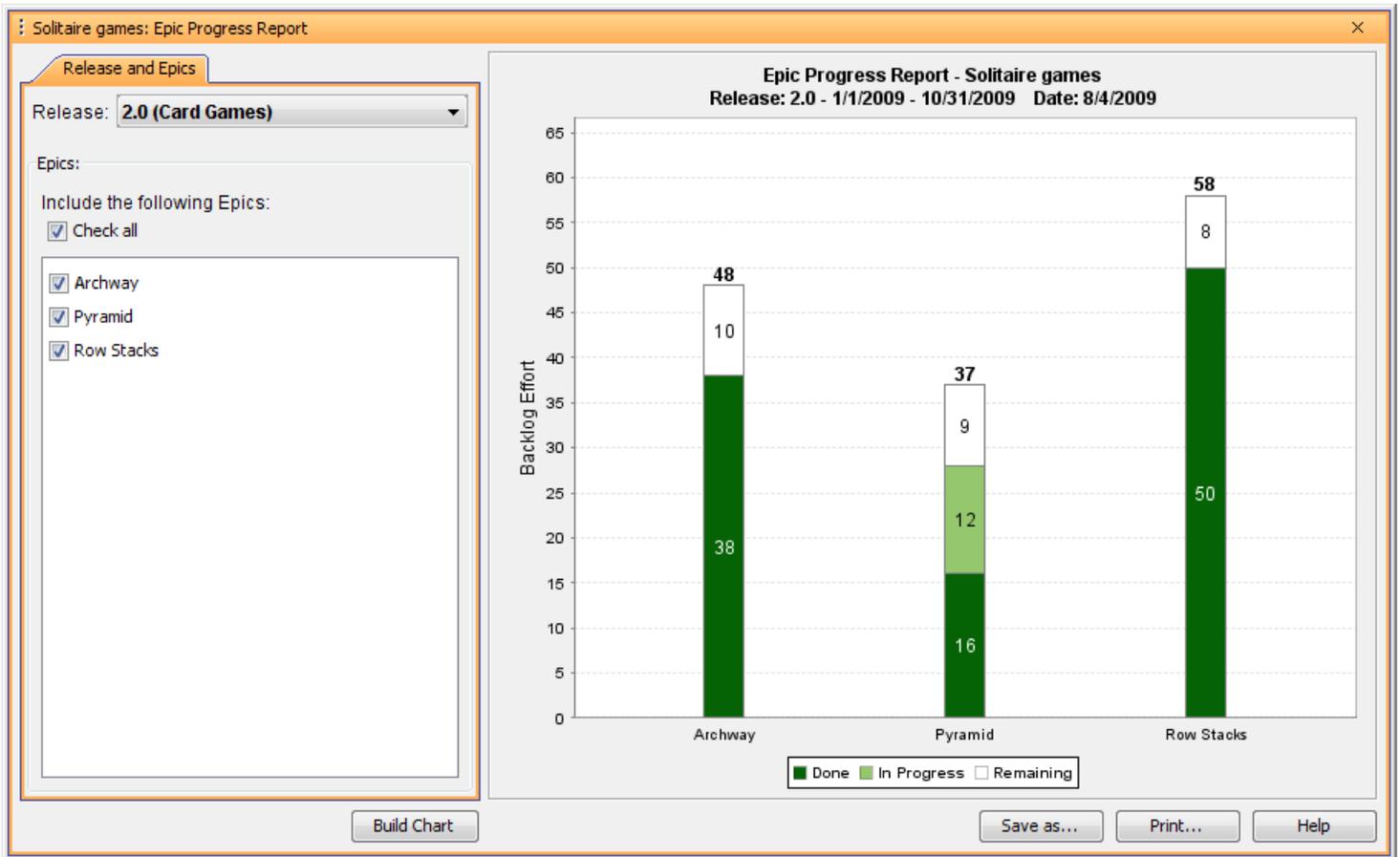
This concludes the ScrumWorks Pro Epics tutorial. Please contact support with any questions or clarifications.