
Getting Started with the Salesforce® Agile Accelerator

Salesforce, Summer '16



CONTENTS

SALESFORCE AGILE ACCELERATOR	1
WHAT'S NEW WITH SALESFORCE AGILE ACCELERATOR	2
INSTALL SALESFORCE® AGILE ACCELERATOR	3
ASSIGN A DEFAULT PERMISSION SET	4
PERMISSION SETS DETAIL	5
CREATE AND MANAGE TEAMS	7
SALESFORCE PRODUCT TAG OVERVIEW	8
CREATE PRODUCT TAGS	9
CREATE YOUR FIRST SPRINT	10
SALESFORCE EPICS	12
SALESFORCE THEMES	14
CREATE A WORK RECORD	15
RELATE A CASE TO A WORK RECORD	17
CREATE A TASK	19
VIEW YOUR BACKLOG MANAGER	21
PANEL TYPES AND CRITERIA	23
CUSTOM PICKLIST VALUES FOR WORK RECORDS	24
CUSTOM FIELDS FOR WORK RECORDS	26
CUSTOM FIELDS FOR PRODUCT TAGS	28

- CONFIGURE COMMUNITIES 30**
- CREATE USER STORIES AND BUGS IN SALESFORCE1 32**
- CONFIGURE EMAIL VOLUME 34**
- CONFIGURE THE EMAIL2AGILE SERVICE 35**
- USE THE QUICK CREATE WORK RECORD GOOGLE CHROME
EXTENSION 36**
- KANBAN 38**
 - What is Kanban? 38
 - Create a Kanban Board 39
 - Edit a Kanban Column 40
 - Manage Your Kanban Backlog 41
 - Customize Kanban Cards 43

SALESFORCE AGILE ACCELERATOR

Salesforce® Agile Accelerator helps you manage your agile product development with the same technology that's used in your Salesforce organization. Your entire team can track user stories, bugs, reports, and more from within Salesforce. For added flexibility, Kanban is supported. Use it together with Scrum, or by itself.

With Salesforce® Agile Accelerator, your information is secure and fully integrated with other Salesforce apps, such as Sales Cloud and Service Cloud. You can connect user stories and bugs to CRM cases and accounts. Because Salesforce® Agile Accelerator runs on the Salesforce1 platform, your team is mobile and social with the Salesforce1 mobile application. You can also integrate to other systems and easily extend the Salesforce® Agile Accelerator to meet any business process.

Salesforce® Agile Accelerator comes with a default team, product tag, and several reports and dashboards for you to use in testing.



Note: By default, the sample reports located in the Agile Accelerator folder are available only to the administrator who installed the package. The administrator can share the reports with individual users, public groups, or roles.

Setting up your custom agile environment involves the following steps.

1. [Install Salesforce® Agile Accelerator](#)
2. [Assign a Default Permission Set](#)
3. [Add Scrum Teams](#)
4. [Define Sprints](#)
5. [Create Work Records](#)
6. [Create Tasks](#)
7. [View Your Backlog Manager](#)
8. [What is Kanban?](#) (optional)
9. [Configure the Email2agile Service](#) (optional)

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** editions.

WHAT'S NEW WITH SALESFORCE AGILE ACCELERATOR

See the new features included in the April 2016 update of Salesforce® Agile Accelerator.

For more information, see www.salesforce.com/agile.

Enhancements for Lightning Experience Users

Lightning Design System applied to Bug, User Story, Investigation, Kanban Board, Backlog Manager, Sprints, and Team pages when you view them in Lightning Experience. And, you can add Lightning Experience menu items for Work, Kanban, Backlog Manager, Sprints, and Team objects in your organization. For more information on adding menu items, see [Create a Navigation Menu by Using the Lightning Experience Navigation Menu Wizard](#).

Add Investigations to Sprints

You can add Investigations to Sprints, assign story points, and add tasks to the Investigation. Previously, Sprints only included Bugs and User Stories.

Kanban Improvements

- Work items in the **Closed** column now remain on the board until you manually remove them. Or, click the **x** icon next to the **Closed** label to empty the entire column. For more information, see [Manage Your Kanban Backlog](#).
- Copy content to your system Clipboard.
- Filter content by Product Tag.
- The Quality Engineer field is now available for Kanban cards.

Use the Quick Create Google Chrome Extension

Create Bugs and User Stories with the **Quick Create Work Record** extension from the Google [Chrome Store](#). For more instructions, see [Use the Quick Create Work Record Google Chrome Extension](#).

Visual Accessibility Improvements

We improved the UI for users who are blind.

Set the Size of a Team Dependency

Drag the Size picklist onto your Team Dependency page layout. This picklist allows teams to size dependencies that don't have associated User Stories, yet.

Bug Fixes

This update includes 37 different bug fixes.

INSTALL SALESFORCE® AGILE ACCELERATOR

The Salesforce® Agile Accelerator is available on the AppExchange as a managed package.

Instructions for installing AppExchange managed packages can be found here:

[Application Installation Guide](#)

After you've installed the package, check to see if it's there.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps** to see the list of apps that are installed in your organization.
2. Look for the Salesforce® Agile Accelerator installed package.
3. After you've verified the installation, select Salesforce® Agile Accelerator from the Application Selector in the upper right corner.

When you finish installing, assign permission sets.

SEE ALSO:

[Assign a Default Permission Set](#)

[Permission Sets Detail](#)

ASSIGN A DEFAULT PERMISSION SET

Salesforce® Agile Accelerator has two permission sets that you can assign to users, one with administrative permissions and the other for non-administrators.

1. From Setup, enter *Users* in the *Quick Find* box, then select **Users**.
2. Click the user's name.
3. Scroll to the Permission Set Assignments related list.
4. Click **Edit Assignments**.
5. Select a permission set and click **Add**.
6. Click **Save**.

SEE ALSO:

[Permission Sets Detail](#)

PERMISSION SETS DETAIL

Here's a table of the Salesforce® Agile Accelerator permission sets and their details.

The possible permissions are: **Read (R) Create (C) Edit (E) Delete (D) View All (VA) Modify All (MA)**

Table 1: Salesforce® Agile Accelerator Permission Sets Detail

Permission	Agile Accelerator Admin	Agile Accelerator User
Acceptance Criteria	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Assignment Rules	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Builds	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Burndown Items	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Change Lists	R, C, E, D, VA, MA	R, C, VA
Comments	R, VA	R, VA
Deleted Tasks	R, C, VA	R, C, VA
Epics	R, C, E, D, VA, MA	R, C, E, D, VA, MA
eRelease Requests	R, C, E, D, VA, MA	R, C, E, VA
Frequencies	R, VA	R, VA
GUS Exceptions	R, C, VA	R, C, VA
Impacts	R, VA	R, VA
Impact Types	R, VA	R, VA
Out of Office Logs	R, C, E, D, VA, MA	R, C, E, VA
Priorities	R, C, VA	R, VA
Priority Mapping	R, C, E, D, VA, MA	R, VA
Priority Overrides	R, C, E, D, VA, MA	R, C, VA
Product Tags	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Related Works	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Release Burndown Items	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Released In	R, C, E, D, VA, MA	R, C, E, VA
Release Events	R, C, E, D, VA, MA	Not Available
Release Event Templates	R, C, E, D, VA, MA	Not Available
Releases	R, C, E, D, VA, MA	E, VA

Permission Sets Detail

Permission	Agile Accelerator Admin	Agile Accelerator User
Root Cause Analysis	R, C, E, D, VA, MA	R, C, E, VA
Severities	R, VA	R, VA
Severity Types	R, VA	R, VA
Sprints	R, C, E, D, VA, MA	R, C, E, VA
Tag Assignments	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Tasks	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Team Dependencies	R, C, E, VA	R, C, E, VA
Team Members	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Team Releases	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Teams	R, C, E, D, VA, MA	R, C, E, VA
Theme Assignments	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Themes	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Types	R, VA	Not Available
Work	R, C, E, D, VA, MA	R, C, E, D, VA, MA
Work History	R, C, VA	R, C, VA
Work Subscribers	R, VA	R, VA,

SEE ALSO:

[Assign a Default Permission Set](#)

CREATE AND MANAGE TEAMS

Agile teams include cross-functional members such as, software engineers, architects, programmers, analysts, QA experts, testers, and UI designers. You'll need to define your teams as one of the first steps to using Agile. After team members are added, you can assign the role and the availability of each member.

To create or edit a team:

1. From within the application, click the Teams tab.

From here you can either edit an existing team or create a new team.

2. To create a team, click the **All Teams** link at the top of the page.

3. When the list view appears, click **New Team**.

Required fields appear with a red bar to the left of the field.

4. Choose a name and a cloud. The cloud name is the same as department.

5. Enter the team members' names, their roles, and their availability allocations.

Although roles and allocation aren't required, knowing a team member's allocation is an important factor during sprint planning.

6. Enter a name for the Product Tag.

A Product Tag is required to create user stories and bugs for the team. You can also create tags from the Product Tag tab. Product Tags drive assignment rules that allow you to automatically populate assignees on work records.

7. Click **Save**.

SEE ALSO:

[Salesforce Product Tag Overview](#)

[Create Product Tags](#)

SALESFORCE PRODUCT TAG OVERVIEW

Product tags provide a way of organizing your work into logical categories. Product tags are unique for each team in your organization and are required when you're creating work items. So, you'll need at least one product tag for each team. Product tags are typically used to represent product areas or departments, but can represent whatever your organization decides.

For example, let's say you have a small team that produces an application called Find Files. You can create a product tag called FindFiles and use it with all work items. But, what if the team is larger and produces your Find Files application for Android and iOS users? Half the team members work on iOS and the other half work on Android. You can then create two product tags called FindFiles-iOS and FindFiles-Android and use the two tags to separate the work for each group within the team.

When you create a product tag, you must define at least one assignment rule. When work items are created, an assignment rule automatically assigns work items to particular team members based on the product tag. Requiring an assignment rule ensures that no work item gets lost or go unattended. When you're creating an assignment rule, the roles of assignee and product owner are required. You can also add other members of the team such as a specific QA engineer. For example, you can assign a particular developer, product manager, and QA engineer to the FindFiles-iOS tag assignment rule and different people to the FindFiles-Android rule. Team members can reassign the work item to other members of the team as needed, but the initial assignment is done by the assignment rule.

Product tags are created from the Team page or from the Product Tag tab in the main menu bar.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** editions.

SEE ALSO:

[Create Product Tags](#)

[Create and Manage Teams](#)

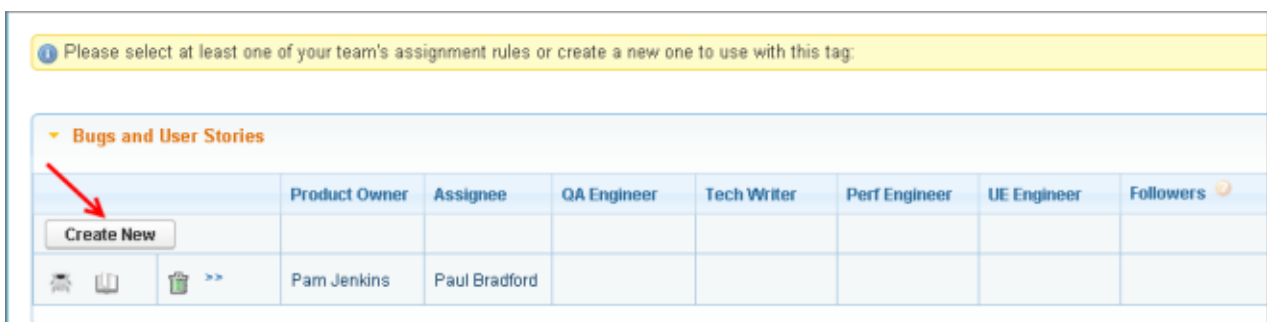
CREATE PRODUCT TAGS



You can create Product tags to organize your team's work into logical categories. Product Tags are created from the Team tab or the Product Tag tab and are required when you create work items.

All work items require the assignment of a Product Tag. So, make sure you create at least one tag for your team.

To create a Product Tag:

1. From your team's page, click **Product Tags** and then **New Product Tag**. Alternatively, click the **Product Tags** tab from the menu bar and then **New**.
2. Enter a name for the Product Tag, and then click **Save**.




	Product Owner	Assignee	QA Engineer	Tech Writer	Perf Engineer	UE Engineer	Followers
Create New							
 	Pam Jenkins	Paul Bradford					

The assignment rules page appears. Add at least one assignment rule to a Product Tag to ensure that no bug or user story goes unattended.

3. Click **Create New** to create an assignment rule.
4. Click the bug or user story icon to select the type of work item that rule affects.



 **Note:** You can create different rules for bugs and user stories, or you can choose to make the same assignment rule work for both types of work items. You can also choose any assignment rule that's already on the list.

5. Enter the names of the assignees. Product Owner and Assignee are required fields.



	Product Owner	Assignee	QA Engineer	Tech Writer	Perf Engineer	UE Engineer	Followers	Used By
 	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>

6. Click **Save**.

SEE ALSO:

[Salesforce Product Tag Overview](#)
[Create and Manage Teams](#)


CREATE YOUR FIRST SPRINT

Once you've got your team created, you'll want to create your sprints to organize your work into manageable chunks.

Many teams use sprints that are two weeks long, but you can create any duration up to one month long. There's a sample sprint on the Sprint tab that's loaded with test data. If it's the first time that you've viewed a sprint, you're prompted to take a guided tour of the available features. You can skip the tour because you can click the Guided Tour link in the top right corner of the screen at any time.


To create a sprint:


1. Click the **Sprint** tab.
2. Click the **List View** link in the top left corner.
3. When the list view appears, click **New Sprint**.
4. Enter the name of the sprint. The suggested format is yyyy.mm.sprint number(a-f). team name.
For example, if you have two-week sprints, the sprint that covered the first two weeks of September 2014 would be 2014.09a-MyTeamName. The second two weeks would be 2014.09b-MyTeamName. Following a naming convention helps with reporting later on.

 **Note:** You can change the sprint naming convention by modifying the validation rule on the Sprint object in Setup. From the object management settings for sprints, go to Validation Rules, and then modify or de-activate the Verify Name Format validation rule.

5. Enter the name of the agile team that you created earlier in the Agile Team field.
6. Populate the Start Date and End Date fields.
Make sure that start and end dates don't overlap with the dates of other sprints for your team. Again, a typical sprint is two weeks.

7. Click **Save**.
Your virtual wall appears.

 **Note:** You can sort the work records by Assignee and QA Engineer. Click the drop-down arrow next to the Assignee or QA Engineer fields in the header. Check the names of the people whose work you want to see.



Sprint | [List View](#)

2015.02b-TeamName

Actual Velocity

Planned Velocity

Days Left

15

3


Virtual Wall

Sprint Details

Charts

<div><div></div><div></div></div>	Subject	Status		Assignee		QA Engineer		Themes	Build
<div><div></div><div></div></div>	<div><div></div>API Testir</div>	<div>New</div>	<div></div>	<div><div></div>Kimberley</div>	<div></div>	<div><div></div>Troy</div>	<div></div>	-	
<div><div></div><div></div></div>	<div><div></div>Performai</div>	<div>New</div>	<div></div>	<div><div></div>Paul</div>	<div></div>	<div><div></div>Troy</div>	<div></div>	-	
<div><div></div><div></div></div>	<div><div></div>Add Case</div>	<div>New</div>	<div></div>	<div><div></div>Paul</div>	<div></div>	<div><div></div>Jenny</div>	<div></div>	-	
<div><div></div><div></div></div>	<div><div></div>Installation</div>	<div>New</div>	<div></div>	<div><div></div>Paul</div>	<div></div>	<div><div></div>Jenny</div>	<div></div>	-	

Table 2: Sprint View Fields

Field	Function
Assignee	You can filter your view by assignee.
Navigation tabs	You can switch between the Virtual Wall, Sprint Details, and Charts sections.
List of all Sprints	Returns you to a list view of your sprints.
Current Sprint	The name of current sprint.
Navigate between Sprints	Use to view previous and upcoming sprints.
Actual Velocity	The current sprint velocity.
Planned Velocity	The planned velocity.
Activity menu	Shows events occurring on the wall.
New Work	Click to create new user stories or bugs.
Filter menu	Allows you to filter the data displayed on the Virtual Wall.
Chatter toggle	Turns on or off the Chatter sidebar feed.
Full-screen toggle	<p>Hides the header or footer of the page to reveal more space.</p> <p> Note: You can optionally put your browser into full-screen mode.</p>
Guided Tour and Help	This tour interactively walks you through the Virtual Wall.
Days Left in Sprint	The number of days left in sprint.
Task view	Lists all the tasks.
Story view	Use to view a list of your user stories and bugs.
QA Engineer	You can filter the sprint content by QA Engineer.

SEE ALSO:[View Your Backlog Manager](#)[Create a Work Record](#)[Create a Task](#)

SALESFORCE EPICS

An Epic is a large User Story that can't be completed in a single sprint or sometimes even multiple sprints. Because Epics are large projects, Agile teams break them down into smaller, manageable User Stories.

As an example, let's use making a movie. The entire movie is the Epic, and each scene in the movie is a User Story. If you don't break the movie into smaller parts, like scenes, it's challenging to scope and manage things such as budget, actors, and filming time. Some other examples of potential Epics where it's necessary to break the project into smaller parts to judge the scope of the work are:

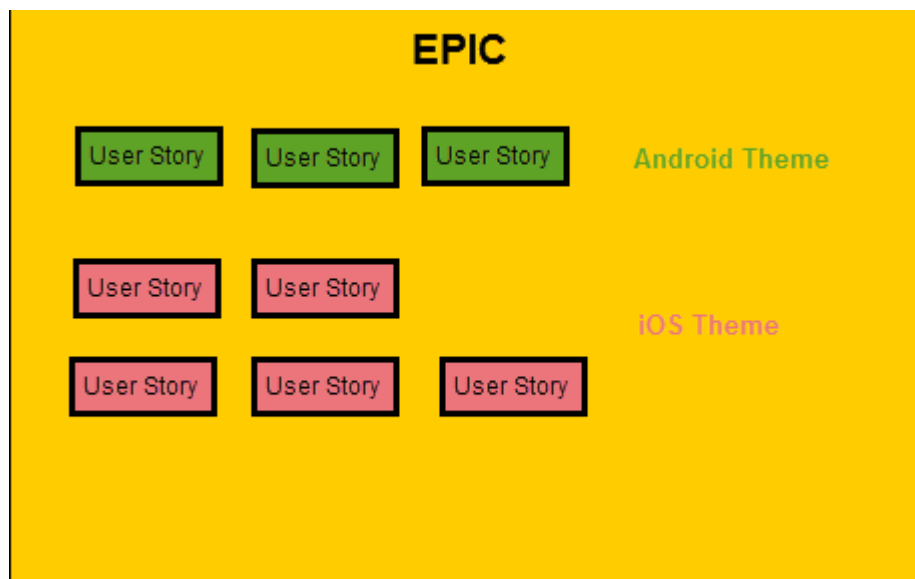
- Creating a mobile application that tracks mobile visitors to your website for both iOS and Android
- Creating a way to add users to Salesforce in bulk
- Training users how to use a new software release

As you split an Epic into smaller User Stories, you can use themes to group similar User Stories together. For example, when creating a mobile application for visitor tracking, organize your User Stories with an iOS theme and an Android theme.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** editions.

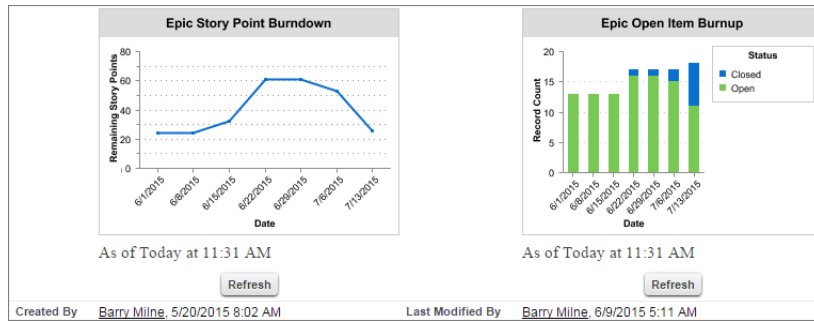


There are two options for adding an epic to a work record:

- From within the Epic, click **New Work**.
- From within a User Story, enter the epic name in the Epic box on the detail page.

From the Epic's detail page, you can see details about attachments, open activities, team dependencies, and work assigned. There are also burndown and burnup charts that show the remaining points assigned to the Epic and the number of closed and open records by date.

Salesforce Epics



SEE ALSO:

Salesforce Themes

Create a Work Record

SALESFORCE THEMES

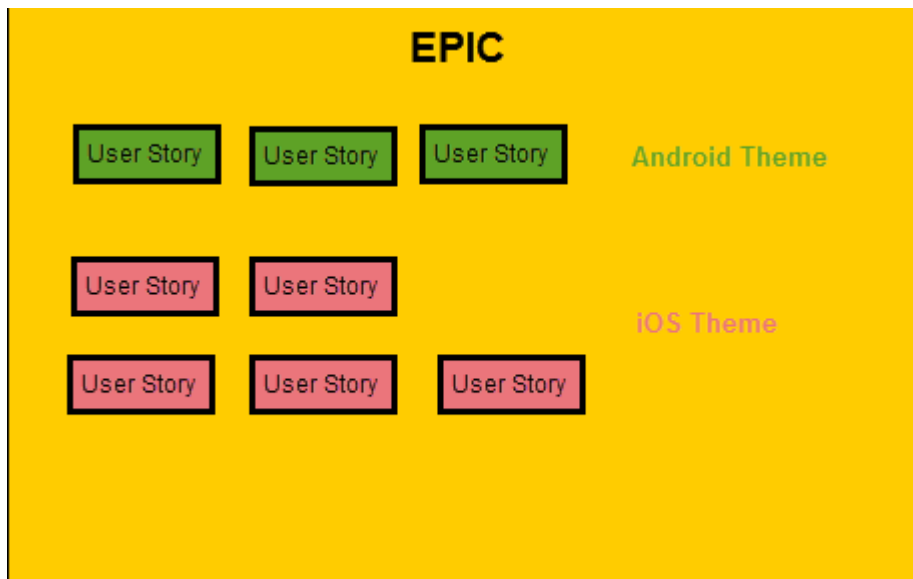
Themes are a way to group similar User Stories together. Some people refer to them as tags. All the User Stories assigned to a theme are related, such as they all focus on a particular operating system or feature.

For example, let's say that you're working on a mobile Web application for both iOS and Android and you created a Theme for each operating system. You can assign Themes to work items and then use an assignment rule to assign them to particular team members. You can also create reports and dashboards based on Themes.

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** editions.



There are two options for adding a theme to a work record:

- From within the Theme, click **Add Work To Theme**.
- From within a User Story, enter the theme name in the theme related list.

SEE ALSO:

[Salesforce Epics](#)

[Create a Work Record](#)

CREATE A WORK RECORD

After you've got your sprints defined, you'll want to start adding work records. Two of the common types of work records are user stories and bugs.

You can create user stories and bugs on the sprint virtual wall by using the Work tab or the New Work button. These steps describe how to create work using the Work tab. Creating work using the sprints virtual wall is identical.

To create a user story:

1. Click the **Work** tab and then **New**. Alternatively, click the **Sprint** tab and then **New Work**.
2. From Record Type, select **User Story** then click **continue**. Other choices are bugs and investigations. A description of each record type is shown at the bottom of the page.

You'll see the user story dialog appear.

3. Enter a short description in the Subject field, enter a detailed description in the Description field, and then assign a product tag. As you start typing in the Product Tag field, a list of suggestions appears. After you pick your Product Tag, the Assignee field is automatically populated with a member of your team if you defined it to auto-assign a team member. You can optionally create an assignment rule to assign a default team member. This is done from the Product Tag tab on your team's detail page.
4. In the Sprint field, start typing the name of your sprint to see a list of suggestions. Pick a sprint from the list.
5. Click **Save**. Notice the related lists at the bottom of the page. You can use the various related lists to discuss the user story, assign themes, relate it to other work records, and more.

Here's what a user story looks like on the Virtual Wall. It includes several tasks, which you'll learn about in the next section.

Create a Work Record

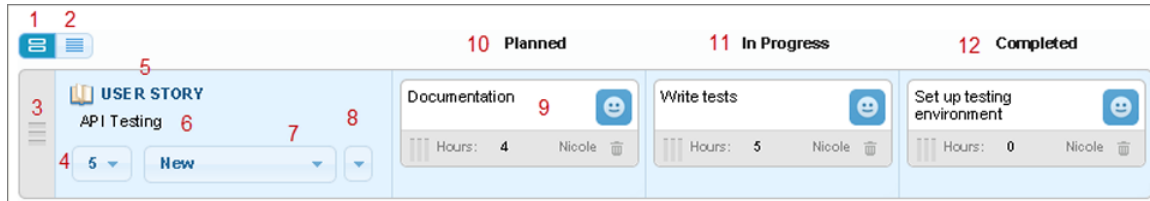


Table 3: User Story Fields

Number	Field	Function
1	Expands work list	Expands the work list to show detail.
2	Compresses work list	Compresses the work list with minimal detail.
3	Sorting gripper	Drag the work card up and down to change the priority.
4	Story points	Uses the scale defined in your team setup. The default is the Fibonacci story point scale.
5	Record icon and type	Icon and text for user story, bug, or todo work items.
6	Record subject	Inline editable subject field (maximum 255 characters)
7	Record status	Displays the status of the work record. Moving items to Closed or Completed moves all tasks to the Completed column.
8	Work options	Add task, view work (in new window), or remove record from sprint.
9	Task record	Task record with details.
10	Planned tasks	Double-click the column to add a new task.
11	In-progress tasks	Double-click column to add a new task. Make sure that you input hours into the task card. If left at zero, it moves into the Completed column.
12	Completed tasks	Double-click the column to add a new task. If you set hours, the task moves to the In Progress column.

SEE ALSO:

[Relate a Case to a Work Record](#)

[Create a Task](#)

[Create Your First Sprint](#)

[View Your Backlog Manager](#)

[Salesforce Product Tag Overview](#)

RELATE A CASE TO A WORK RECORD

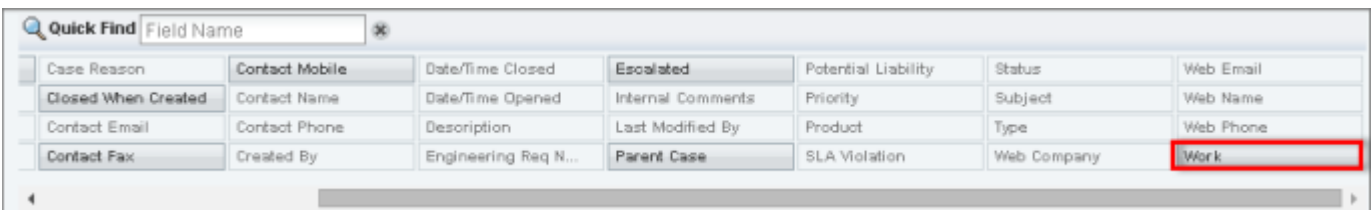
By adding a custom case field to the Case object page layout, you link your cases and work records. This allows you to see case information while you're viewing the work record without having to open the case separately.

Relating case and work records together is a two step process. First, you customize the Case page layout by adding a custom field, and then you populate that field with the work record number.

1. From the object management settings for cases, go to Page Layouts.

Many companies have more than one page layout for cases, such as one for sales and one for support. You can add the work field to any layout.

2. Click **Edit** to open the page layout.
3. Locate the **Work** field and drag it to your desired location on the page layout.



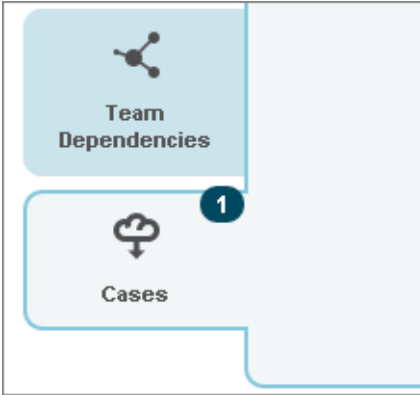
A screenshot of the Case Information section in the Salesforce Case record view. The section is titled 'Case Information (Header visible on edit only)'. It contains several fields: Case Owner (Sample User), Work (Sample Work), Case Number (GEN-2004-001234), and Contact Name (Sample Contact). The 'Work' field is highlighted with a red box.


4. Click **Save**.
5. Create a new case or edit an existing one. Look for the **Work** field. Enter the work record ID into the field. For example, W-00010 to associate the case to the work record.

A screenshot of the Salesforce Case record view. The 'Work' field is highlighted with a red box and contains the value 'W-00010'. Other fields visible include Contact Name, Account Name, Type (dropdown menu), and Case Reason (dropdown menu).

When you save the case, a new tab appears on the work record.

Relate a Case to a Work Record



 **Note:** If you can't see the **work** field even though you added it to the correct page layout, check your profile permissions for the field. From the object management settings for cases, click the **Work** field name, then click **View Field Accessibility**.

SEE ALSO:

[Create a Work Record](#)

[Create a Task](#)

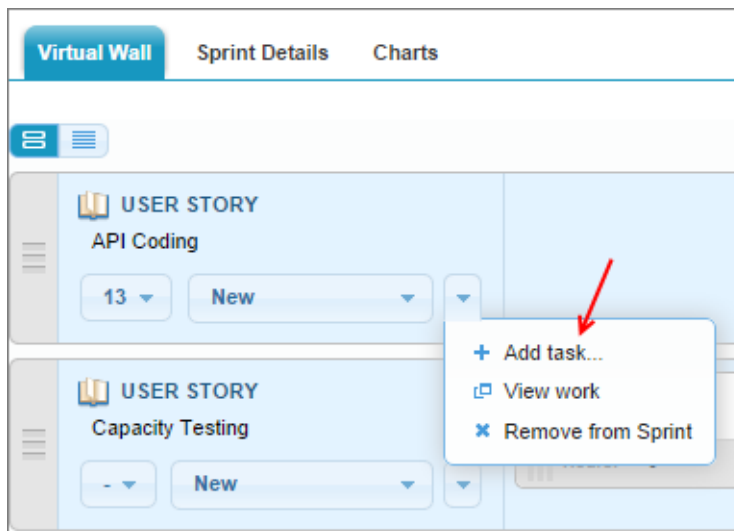
CREATE A TASK


Within each user story, you can create tasks that are assigned to individual team members. That way, you can keep a detailed record of the progress for each story.

It's especially helpful to create tasks when user stories are rather large or when you have more than one person working on a user story.

To create a task:

1. From your sprint, click the drop-down arrow within a user story and then select **Add task**.



2. Fill in the task description and hours that it takes to complete the task.
3. The task is automatically assigned to whomever creates it. Once the task is saved, you can click  to bring up a list of team members and reassign the task.

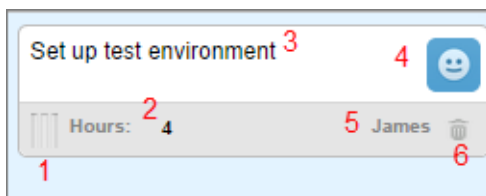


Table 4: Task Fields

Number	Field	Function
1	Sorting gripper	Drag the task between columns.
2	Remaining hours	Shows the hours remaining on the task. If set to zero, the task is moved to Completed. If set to anything above zero, the task is moved to In Progress.

Create a Task

Number	Field	Function
3	Task subject	Inline-editable subject (maximum 255 characters).
4	Task assignee	Assign tasks to team members.
5	Assignee name	The name of the Assignee.
6	Remove-task icon	Deletes the task.

As you manage tasks for a user story, you drag them from Planned to In Progress when starting the task. When you've completed a task, drag it to Completed.

SEE ALSO:

[Create a Work Record](#)

[View Your Backlog Manager](#)

VIEW YOUR BACKLOG MANAGER

The Backlog Manager is a great place to go when you need to manage all of your team's work. You can add individual panels to see specific types of work.

By adding multiple panels, the Backlog Manager helps teams prioritize and plan with improved visibility, because they can see all the team's work in one place. This leads to a better and more realistic allocation of work and tasks, and it helps teams assign work to the right bucket and quickly route work to the right people. The Backlog Manager gives better visibility of a team's work to other teams who might want to see if there are potential dependencies. This provides better visibility across the organization.

To view your Backlog Manager:

1. Click the **Backlog Manager** tab.

If you're on more than one team, you might get a prompt to pick a team.

You are shown two panels by default: your team's backlog and backburner. The backlog is for user stories that your team has prioritized to work on in a sprint. The backburner represents open user stories that haven't been prioritized by your team.

2. Drag the user story that you just created from the backburner to the backlog.
You can edit the user story by clicking its subject. This opens a lightweight editor where you can make changes.
3. Open a new panel by clicking the **Add Panel** link in the top left corner.
4. Select **By Sprint**.
5. Enter the name of the sprint that you created in a prior step.
A panel opens that contains only work records for that sprint.

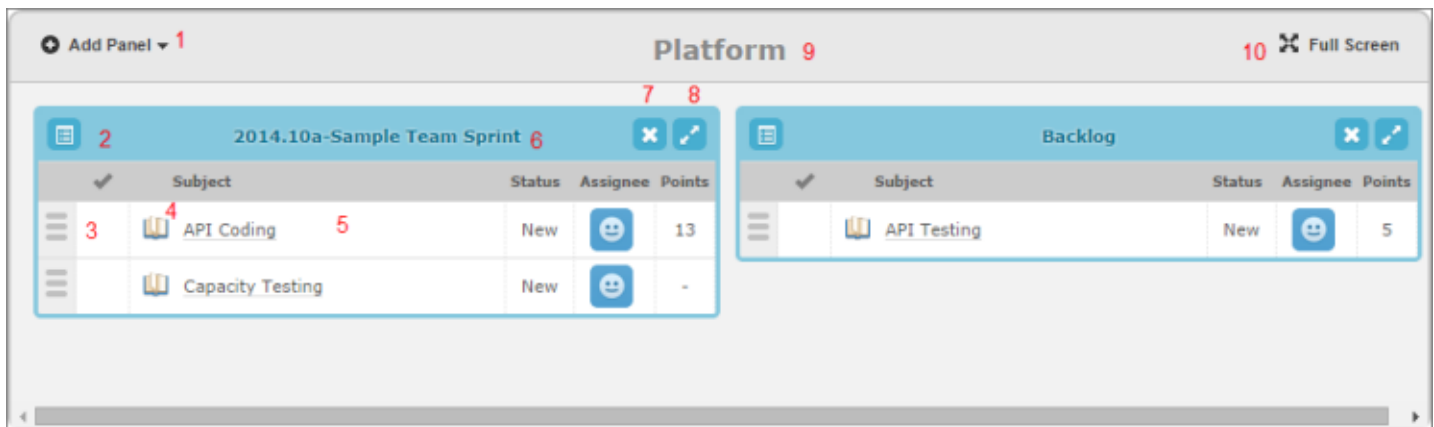


Table 5: Task Fields

Number	Field	Function
1	Add panel drop-down	Allows you to show several different panels.
2	Column toggles drop-down	Toggles available columns on and off. Toggles might vary depending on the panel type.

View Your Backlog Manager

Number	Field	Function
3	Sorting gripper	Use this to move work items up and down in the list.
4	Subject link	Opens the editor.
5	Work row	These are the work items such as user stories, bugs, and todo records. You can drag work records up and down in the list using the.
6	Panel name	The name of the panel. You can grab this title with your cursor to rearrange panels left and right.
7	Close panel	Closes the panel.
8	Expand panel	Expands the panel to consume all the available area. It hides all other panels until the button is toggled or the panel is closed.
9	Team name	The name of the current team's Backlog Manager.
10	Full-screen toggle	Turns on and off full-screen mode in browser.

SEE ALSO:

[Create a Work Record](#)

[Create a Task](#)

[Create and Manage Teams](#)

PANEL TYPES AND CRITERIA

Here's a short list of the panel types and their criteria that are available on the Backlog Manager.

Table 6: Panel Types and Criteria

Backlog <ul style="list-style-type: none"> • Add work items that aren't assigned to a sprint • Open bugs, user stories, and todos • Backlog rank is not null • Ordered by backlog rank and then by created date • Shown items correspond to selected team 	Backburner <ul style="list-style-type: none"> • Open bugs, user stories, and todos • Backlog rank is null • Ordered by created date • Shown items correspond to selected team 	By Theme <ul style="list-style-type: none"> • Open bugs, user stories, and todos • Shown items correspond to selected team and theme • Ordered by backlog rank and then by created date
Feature Backlog <ul style="list-style-type: none"> • Open user stories only • Backlog rank is not null • Theme assignment not equal to Trust • Ordered by feature rank, then backlog rank, then created date • Shown items correspond to selected team 	Trust Backlog <ul style="list-style-type: none"> • Open bugs, user stories, and todos • Backlog rank is not null • Global theme assignment is Trust • Ordered by theme rank, backlog rank, then created date • Shown items correspond to selected team 	By Build <ul style="list-style-type: none"> • Open bugs, user stories, and todos • Shown items correspond to selected team and build • Ordered by theme rank, backlog rank, then created date
By Sprint <ul style="list-style-type: none"> • Open bugs, user stories, and todos • Shown items correspond to selected team and sprint • Ordered by sprint rank, backlog rank, then created date 		

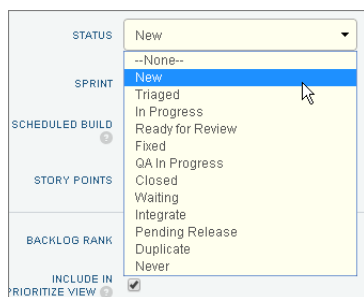
SEE ALSO:


[View Your Backlog Manager](#)

CUSTOM PICKLIST VALUES FOR WORK RECORDS

You can customize the values in the Status picklist on work records. It's a two part process that involves editing the Status field on the Work custom object and then adding the values to the Work Status object.

The new fields show up as picklist values in the Status field on the Work record.

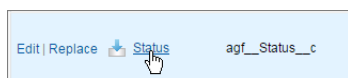


 **Warning:** When customizing the picklist values, never remove the Closed value or features like the sprints Velocity calculation don't function correctly.

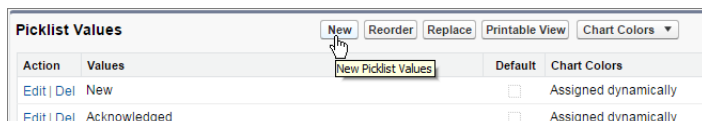
1. From the object management settings for the Work object, click **Work**.



2. Find the Status in the Custom Fields & Relationships related list, and then click **Status** to open it.



3. In the Picklist Values related list, click **New**.




4. Enter the name of the new value and select the work record type where you want it to appear.
5. To modify the Work Statuses object, click the plus at the end of the tab menu bar.



6. Locate Work Statuses in the list and click to open it.

Custom Picklist Values for Work Records



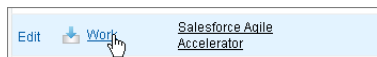
7. Create an item with the same name as the picklist value.
 8. Select the record types it applies to.
 9. Enter a sort order.
Picklist values are sorted by the Order field in ascending order. So a picklist value with the order of 10 appears higher on the list than a value with the order of 20.
-  **Note:** For Agile Accelerator installations completed before June 2015, you might have to manually add the Type and Order fields to the Work status page layout. Salesforce does not currently allow managed packages to change page layouts after the initial install.

CUSTOM FIELDS FOR WORK RECORDS

You can customize the fields that appear in the Additional Fields section on all Work Records by editing the Work custom object. The new fields show up in the Addition Fields section of the Work record or Bug.

A screenshot of the 'Additional Fields' section for a Work record. The section is divided into three columns. The left column contains: 'BACKLOG RANK', 'INCLUDE IN PRIORITIZE VIEW' (checked), 'AGE WITH SCRUM TEAM' (33), 'DUE DATE', 'CASES' (0), and 'TEST'. The middle column contains: 'UE ENGINEER', 'PERFORMANCE ENGINEER', 'CREATED BY' (Chad Holdorf, 4/23/2015 11:03 AM), 'LAST MODIFIED BY' (Sreeesh Nair, 6/9/2015 2:15 PM), and 'CUSTOMER'. The right column contains: 'HELP STATUS' (New) and 'EPIC' (GUS Work Object). At the bottom center, there is a button labeled 'Additional Fields' with up and down arrows.

1. From the object management settings for the Work object, click **Work**.



2. Find the Field Sets related list, and then click **Edit**.



3. Drag the desired fields from the Custom Fields area to the Field Set area. The new fields appear in the Additional Fields section on the Work Record.

Custom Fields for Work Records

Custom Fields ▾

Help for this Page ?

Save Cancel Undo Redo Field Set Properties

Work

Quick Find Work Name

Age	Created Date	Include in Priori...	Test Failure Status	UE Engineer
Age With Scrum Team	Customer	Performance Engineer	Test Resolution	
Age With Scrum Te...	Epic	Regressed	Total Age When Cl...	
Backlog Rank	Help Status	test	Type	

Drag any of the fields above into the list below.

In the Field Set ⓘ

Type

UE Engineer

Test Failure Status


Backlog Rank

Performance Engineer

Test Resolution

Include in Prioritize View

Epic


 **Note:** Adding or removing fields affects only those Work Records created after the change.

CUSTOM FIELDS FOR PRODUCT TAGS

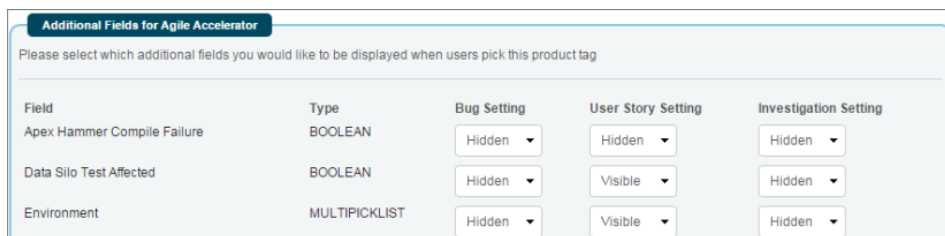
Add custom fields to Product Tags for values that are unique to a particular Team or Product Tag.

If a field is only necessary for a few Product Tags, add it at the Product Tag level. If a field is necessary for the entire org, then add it at the Work object level as described in the “custom fields for work records” section.

If you have a Product Tag called “Salesforce1 Mobile App”, you can create a new required field called “Mobile Device” to track what model of mobile phone the Bug or User Story applies to. Users can select a device when creating a work record for only that Product Tag. Product Tag Fields can be configured to be *visible* or *required* for User Stories, Bugs, and Investigations.

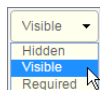
 **Note:** These instructions apply to Agile Accelerator installations from October 2015, or later. If you installed the app before October 2015, see [these instructions for earlier installations](#), instead.

1. View the product tag.
2. Click **Manage Additional Fields**.
3. For each field, choose its visibility setting.



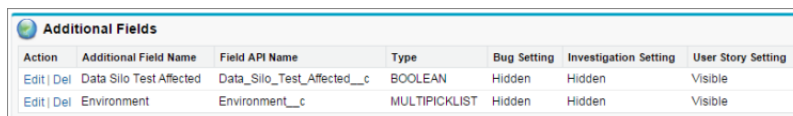
Field	Type	Bug Setting	User Story Setting	Investigation Setting
Apex Hammer Compile Failure	BOOLEAN	Hidden	Hidden	Hidden
Data Silo Test Affected	BOOLEAN	Hidden	Visible	Hidden
Environment	MULTIPICKLIST	Hidden	Visible	Hidden

By default, all fields are hidden. To make the field visible, select **Visible** or **Required** for type of work item where you want the field to appear.



4. Click **Save**.

Once you define a custom field, a new related list appears in the Product Tag detail screen. You can edit and delete the fields using the related list.



Action	Additional Field Name	Field API Name	Type	Bug Setting	Investigation Setting	User Story Setting
Edit Del	Data Silo Test Affected	Data_Silo_Test_Affected__c	BOOLEAN	Hidden	Hidden	Visible
Edit Del	Environment	Environment__c	MULTIPICKLIST	Hidden	Hidden	Visible

Custom fields show up in alphabetical order under regular Standard Fields on the Work record or Bug.

Custom Fields for Product Tags

PRODUCT TAG | GUS Agile Accelerator

STATUS: New | ASSIGNED TO: Kimberley Rathbun | ROOT CAUSE ANALYSIS: |


SPRINT: | QA ENGINEER: | SOURCE CONTROL STATUS: --None--

SCHEDULED BUILD: | PRODUCT OWNER: Kimberley Rathbun |

STORY POINTS: | TECH WRITER: |

DATA SILO TEST AFFECTED: ☐ | ENVIRONMENT: Available, Production, Sandbox, Mobile1

Additional Fields

 **Note:** If you change the Product Tag on a work record, the fields on the work record may change based on the new Product Tag's settings. For example, if the new Product Tag doesn't have the custom field you added to the previous tag, the data doesn't show on the work record. The data isn't lost, it's still populated and you can view it on a report or list view. It shows up again on the work record when the custom field is added to the newly assigned Product Tag.

Custom fields for legacy Agile Accelerator app installations

For Agile Accelerator installations completed before October 2015, edit the Product Tag page layout, manually. Salesforce does not currently allow managed packages to change page layouts after the initial install.

1. Add the "Manage Additional Fields" button and the "Additional Fields" related list to the Product Tag page layout.
2. Optionally, add default picklist values to new fields such as Environment, Mobile Device, Mobile Device OS, Mobile Network etc.

In Salesforce Classic: From Setup, enter *Objects* in the *Quick Find* box, then select **Objects**. Click **Work > Record Types**, then click each record type name (Bug, User Story, Investigation).


In Lightning Experience, from **Setup Home**, search for the **Object Manager**. Click **Work**, and then click each record type name (Bug, User Story, Investigation).

Edit the picklist to assign values. You can also add your own picklist values.

CONFIGURE COMMUNITIES

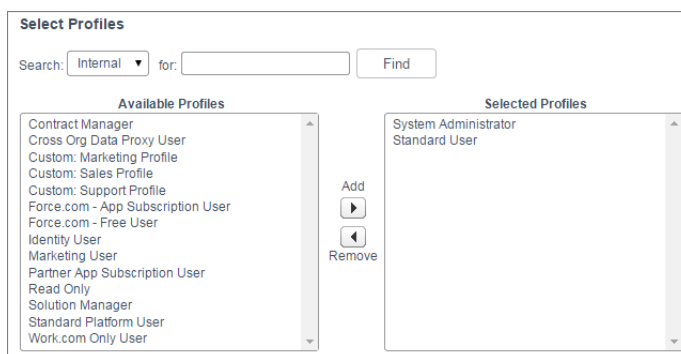
You can use Salesforce® Agile Accelerator with Communities to create work items.

Contact Salesforce for information about adding a Communities license to your organization. Once you have your Community license, follow these steps to set up Salesforce® Agile Accelerator with your Community.

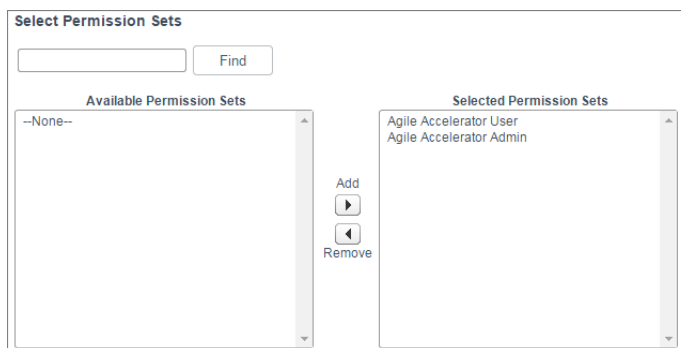
1. Install Salesforce® Agile Accelerator into the Organization where you want the Community.
2. Set up the Community. Instructions for [creating a Community](#) are available in the Help & Training Portal.
3.  **Note:** Salesforce® Agile Accelerator comes with 2 default permission sets. If they give users more permissions than you want, create permission sets that are more restrictive and copy them to the Community. There are currently some inconsistencies with field level permissions.

Log in to the Community as an Administrator and configure: [User Profiles](#), [Permission Sets](#), and [Tabs](#) for Agile Accelerator objects.

4. From Setup, search for Communities.
5. Click **All Communities**.
6. Click **Manage > Administration > .**



7. Click **Members** and add the desired User Profiles.
8. Add the Permission Sets.




9. Add the desired Salesforce® Agile Accelerator tabs to your Community such as Work, Teams, and Epics.

Configure Communities

The screenshot shows a configuration window for Communities. It has two main sections: 'Available Tabs' and 'Selected Tabs'. The 'Available Tabs' section contains a scrollable list of various Salesforce features. The 'Selected Tabs' section contains a scrollable list of the features that have been chosen for the community. Between these two sections are 'Add' and 'Remove' buttons. To the right of the 'Selected Tabs' list are 'Up' and 'Down' buttons to reorder the selected items. At the bottom of the window are 'Save' and 'Cancel' buttons.

Available Tabs	Selected Tabs
Accounts	Chatter
App Launcher	Epics
Assets	Teams
Assignment Rules	Work
Backlog Manager	
Badges	
Badges Received	
Builds	
Campaigns	
Cases	
Console	
Contacts	
Content	
Contracts	

 **Note:** The Backlog Manager works for users who have the "Agile Accelerator" user permission set. You can give this to customers. However, this allows them to edit data on the Backlog Manager. We don't have a permission set that just lets them view the Backlog Manager. Instead, you can accomplish this by creating a list view on the Work tab. Set the `Closed__c` field to 1 and then pick the fields you want to show the user. Finally, you can sort the list view by the `Backlog_Rank_integer` field so that the list view is in the same order as the work records shown on the Backlog Manager page.



For more information about Communities, see [Getting Started with Communities](#).

CREATE USER STORIES AND BUGS IN SALESFORCE1

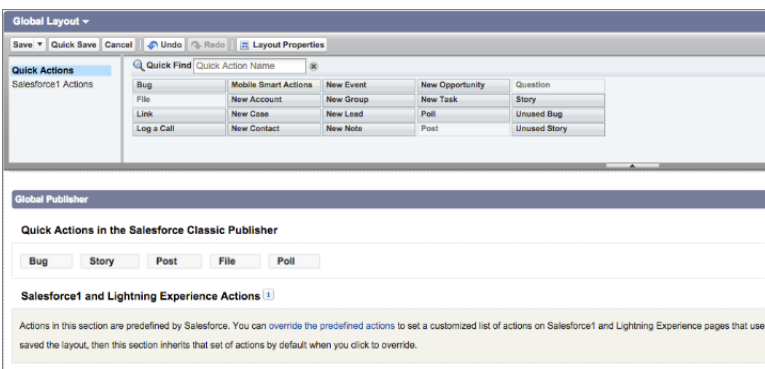
You can customize Agile Accelerator page layouts to make User Stories and Bugs show in your Salesforce1 screens.

To add User Stories and Bugs to Salesforce1 mobile pages do the following:

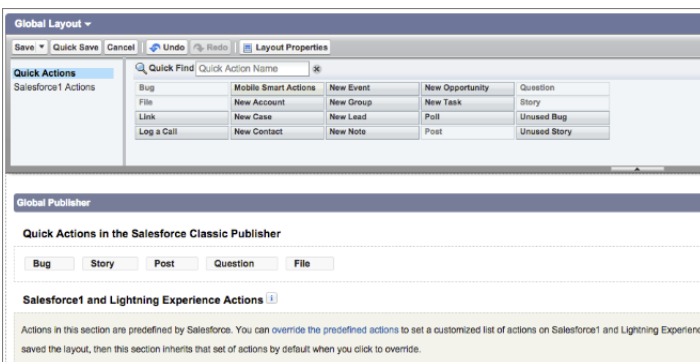
1. From Setup, click **Create > Global Actions > Global Actions**.
2. Click Global Actions and verify that the Custom_Bug and Custom_Story actions are present.

Action	Label	Name	Description
Edit Layout	 Bug	Bug	Standard layout for create record action
Edit Layout	 Story	Story	Standard layout for create story record action

3. Under Global Actions, click **Publisher Layouts** and edit the Global Layout.

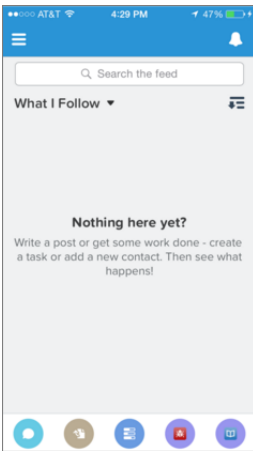


4. Drag the Bug button to the Quick Actions section under Global Actions. Do the same for the Story button.



5. Remove any buttons you don't need, such as the Poll button. If you have more than 5 buttons, some may be hidden in an extras drop-down.
6. Click **Save**.
7. Log into your Org from your mobile device and verify the changes are reflected.
8. You should see the Bug and User Story icons at the bottom of the screen.

Create User Stories and Bugs in Salesforce1



CONFIGURE EMAIL VOLUME


You can allow users to choose which type of email notification they receive when work records change.

The notification levels are:

- Bread & Butter—The user is notified when added as an Assignee and when other users comment.
- Meat & Potatoes—Notifications include everything in Bread & Butter, plus any changes in the status of the work item (the default level).
- The Whole Enchilada—Notifications include everything in Meat & Potatoes, plus changes to any major field.

Follow these steps to add the Agile Accelerator Settings tab to each user's Chatter profile.

1. From Setup, enter *Apps* in the *Quick Find* box, then select **Apps**.
2. Click **Edit** next to Profile Self.
3. Select **Settings** and click **Add** to move settings from the Available Tabs to the Selected Tabs column.
4. Click **Save**.

 **Note:** If you're loading many records and want to suppress email notifications, create an administrative user with "integration" in the Salesforce username. Emails aren't sent when managing records when you're logged in as the "integration" user.

CONFIGURE THE EMAIL2AGILE SERVICE

The Salesforce® Agile Accelerator sends email notifications to users when work like user stories and bugs are created or changed. If you want the user replies to these emails stored in Chatter, you can configure the `Email2agile` service.

After you've installed the Salesforce Agile Accelerator package, the next step is to configure the required `Email2Apex` service.

1. From Setup, enter *Email Services* in the *Quick Find* box, then select **Email Services**.
2. Click **New Email Service**.
3. Enter *email2agile* in the Email Service Name field.
4. Enter *ADM_Email2agile* in the Apex Class field.
5. Make sure to check **Active**.
6. Click **Save and New Email Address**.
7. You'll need to enter a Context User.
It's best to have already created a dedicated user account whose username starts with *email2agile@* for this purpose. For example, *email2agile@yourcompany.com*. That way, the correct user will be identified in the Chatter comments.
8. Enter the domain name of your company's email address in the Accept Email From field.
For example, if a typical email address at your company looks like *john@mycoolstartup.com*, you'd enter *mycoolstartup.com*.
9. Click **Save**.

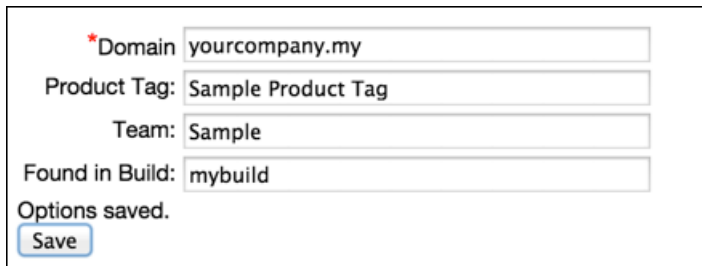
USE THE QUICK CREATE WORK RECORD GOOGLE CHROME EXTENSION

Create Bugs and User Stories, quickly and easily, with the free Google Chrome extension for Salesforce® Agile Accelerator.

This extension only works while using the Google Chrome browser.

Install the browser extension, then select the Quick Create icon to add items.

1. With your Google Chrome browser, go to the [Chrome Store](#) and search for "Quick Create Work Record" by snair.developer.
2. Click **Add to Chrome**.
3. Configure the extension for your domain.
 - a. If your company has My Domain enabled (a custom domain) then the domain field requires the text you see before ".salesforce.com".



The screenshot shows a configuration form for the Quick Create Work Record extension. It contains four text input fields with the following labels and values: "Domain" with "yourcompany.my", "Product Tag" with "Sample Product Tag", "Team" with "Sample", and "Found in Build" with "mybuild". Below the fields, it says "Options saved." and there is a "Save" button.

- b. If you do not have a custom domain, then type your org's instance name in the field. For example if your URL looks like "https://na17.salesforce.com" then enter *na17* in the Domain text field.
4. Once installed, click the plugin icon (to the right of the chrome address bar) and select a tab to create a bug or a user story.

The image shows a web browser window with a Chrome extension interface. At the top, there are tabs for 'USER STORY' and 'BUG', with 'BUG' currently selected. Below the tabs, there are five input fields: 'My Test Bug', 'Sample', 'Sample Product Tag', 'mybuild', and a dropdown menu showing 'P3'. Below these fields is a text area containing the text: 'When I go to the login screen there is a CSS issue with the login button.' At the bottom of the form is a blue button labeled 'Create Bug'.

USER STORY BUG

My Test Bug

Sample

Sample Product Tag

mybuild

P3

When I go to the login screen there is a CSS issue with the login button.

Create Bug

KANBAN

What is Kanban?

Kanban is a system for visualizing the work for a team. You can view how things are progressing, eliminate bottlenecks, and improve the delivery process. Kanban helps you monitor work items at various stages of development.

Kanban is based on four basic principles.

- Visualize what you work on today (workflow)
See all your work in one place is informative.
- Limit the amount of work in progress (WIP)
Assign limits to how many items can be in progress at once for a given workflow state.
- Measure cycle time
Balance the average time to complete one item with delivering quality and value.
- Continuous improvement
After a Kanban system is in place, it becomes the cornerstone for a culture of continuous improvement. Teams measure their effectiveness by tracking flow, quality, throughput, lead times, and more.

Why Kanban?

Knowledge workers often suffer from frequent interruptions, task switching, and excessive multitasking. To prevent this, Kanban limits overburdening by letting people pull work only when they have capacity.

Kanban enables workers to focus on completing small batches of tasks and avoid bottlenecks. Emphasizing workflow creates a balance between the team's capacity, the demands that are placed on it, and the desire to improve speed and quality.

How Is Kanban Different from Scrum?

Table 7: Kanban Scrum Comparison

Kanban	Scrum
No prescribed roles, although it's helpful to have a product owner maintain a prioritized backlog of work	Prescribed roles of Product Owner, Scrum Master, and Team Member
Continuous delivery	Timed sprints of less than 30 days
Work is pulled through the system (single piece flow)	Work is pulled through the system in batches (sprint backlog)
Priority changes can be made at any time	No changes during the sprint
Throughput measured by cycle time	Throughput measured by velocity
More appropriate in environments with a high degree of variability in priority	More appropriate in environments with a lower degree of variability in priority

EDITIONS

Available in: Salesforce Classic

Available in: **Enterprise, Performance, Unlimited, and Developer** editions.

Kanban and the Salesforce Agile Tool

Some team work is not conducive to using Scrum. For example, a team who receives security vulnerabilities can't easily plan a sprint because they aren't able to predict the tickets they will receive. If they employ a Kanban approach to continually prioritize the work, they can limit their WIP to maximize throughput, efficiency, quality, and customer satisfaction.

You can create Kanban boards with the Salesforce Agile tool. The board can co-exist with your regular Scrum team, a process called ScrumBan. Layering Kanban on top of your existing process helps expose bottlenecks and waste and optimize the flow of work for your team.

Want to Learn More About Kanban?

This article by Henrik Kniberg, [Scrum vs Kanban](#), is a great place to learn more about the Kanban philosophy and process.

SEE ALSO:


[Create a Kanban Board](#)

[Edit a Kanban Column](#)

[Manage Your Kanban Backlog](#)

Create a Kanban Board

You create Kanban boards by adding the Kanban tab to your organization. If the team already has a Kanban board, clicking the Kanban tab opens the board for editing.

1. If you don't see the Kanban tab, add the tab to your organization. Click  at the end of your organization's tabs.
2. Click **Customize My Tabs**.
3. Scroll down and select **Kanban**.
4. Click the **Kanban** tab and select which team you want to create the Kanban board for.
5. Select **Create Kanban Board**.

A new Kanban board appears with several columns, which you can modify or add to.



You can use the buttons to manage your board.

Table 8: Kanban Board Buttons

Button	Function
Refresh	Refreshes the Kanban board.
Backlog	Adds new work items to your Kanban board.
Filter	Shows or hides selected work by record type and assignee.
Settings	Settings to add, delete, or edit columns, add WIP limits, and create status mapping.
Full Screen	Puts the board in full screen mode for easier management.

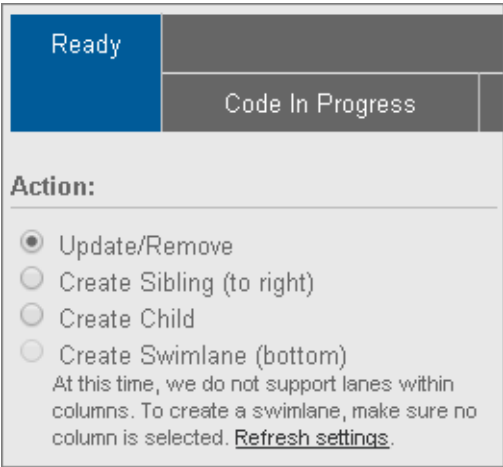
SEE ALSO:

- [Edit a Kanban Column](#)
- [Manage Your Kanban Backlog](#)
- [What is Kanban?](#)

Edit a Kanban Column

You can customize your Kanban board columns to suit your organization.

- From your Kanban board, click **Settings**.
The Kanban board edit screen appears.



- Select a column and click **Update/Remove** to edit the column properties.

Table 9: Kanban Column Actions

Update or Remove	Select a column and then click Update or Remove to change column properties.
Create Sibling (on right)	Create a column on the right of the selected column.
Create a child	Create a column below the selected column.

Create Swimlane	Create Swimlane columns for moving work through the Kanban board quickly, such as to expedite a particular story.
WIP	Set a work-in-progress (WIP) limit on the column.
Status Mapping	Set a status on a column to automatically update the status of work items that are moved into the column.
Remove	Delete the column. You can't delete a column that contains work records.

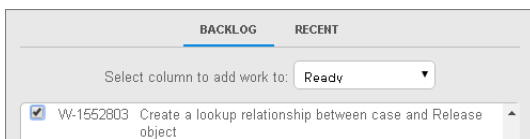
SEE ALSO:

[Salesforce Epics](#)[Manage Your Kanban Backlog](#)

Manage Your Kanban Backlog

You can add work items to your Kanban board using the Backlog button.

1. From your Kanban board, click **backlog**.



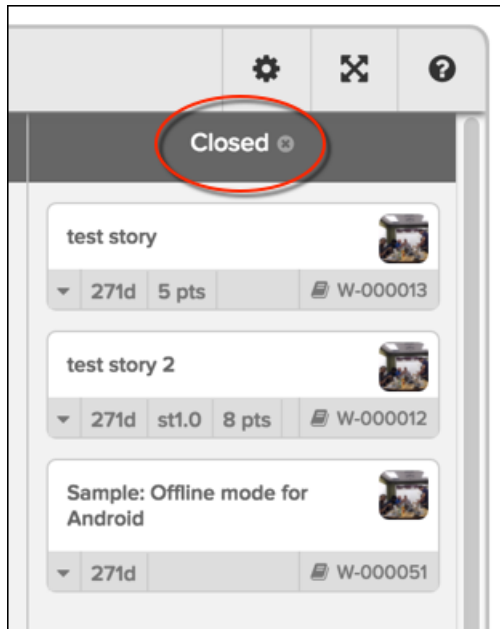
2. Select the column where you want to add a work item.
3. Select the work item you want to add.
4. Click **Import**.

You can move, delete, and sort work items on the Kanban board.

- Move work items by dragging them between columns as work progresses.
- Delete work records by hovering over the picture and clicking the delete button.



- Work items in the Closed column remain on the board until you manually remove them. Or, click the x icon next to the Closed label to empty the entire column.



- Use the filter to search for records and to show or hide selected work by record type and assignee.

Showing all 3 cards

Search:

Record Type:

☐ User Story

Scheduled Build:

Assignee:

☐ Paul Bradford

QE:

☐ Jenny Ables

SEE ALSO:

[Edit a Kanban Column](#)


[Create a Kanban Board](#)

[What is Kanban?](#)

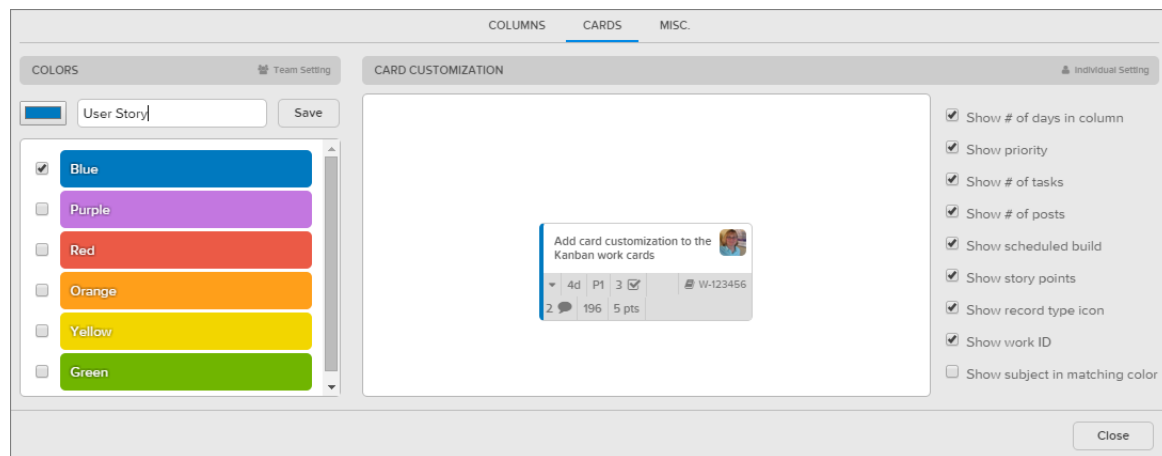
Customize Kanban Cards

You can customize the color and attributes on your Kanban cards. For example, you could create blue for User Stories and then assign blue to each User Story on the board. You can also choose which attributes such as story points, work ID, and scheduled build appear on all the cards.

 **Note:** You can assign colors individually to cards, but the attributes you select affect all cards.

1. From your Kanban board, click **Settings**. 
2. Click **Cards**.

You see a representative card in the center that reflects the color you select.



3. In the Colors column, select a color and type and optional name.
4. Click **Save**.
5. In the individual Settings column, choose which attributes you want to display on all cards.
6. Click **Close**.
7. To assign the color to a card, click the down arrow on a card and select a color.

