

# ESSENCE OF AN AGILE PLANNING BOARD



COUNTERSOFT

## Contents

Gemini Agile Board Guide .....	2
Introduction .....	2
Accessing the board .....	2
The board sections .....	3
The board controls .....	3
1. The zoom section .....	3
2. The group by section .....	4
3. The lane limits section .....	8
4. The order by section .....	10
5. The color by section .....	10
6. Advanced usage .....	11
7. Adding new cards .....	11

## Gemini Agile Board Guide

### Introduction

Gemini provides you with a board view so you can manage, schedule and prioritize your team’s workload. The agile board can act as a SRUM board, Kanban board and accommodate any other methodology you are using. The board makes it easy to visualize the state of your team’s work items by showing each item as a card on the board and summarises the card’s details in a single lane to show you how much work is done for that lane. You can easily move items on the board from one state to another for example.

Gemini’s board can be used to plan, prioritize and schedule work for your team. Each board’s lane will show you the total work assigned to it. You can prioritize the work within a lane by ordering the cards within it. The agile board will show this order to all users that have the same **workspace** view.

The agile board contents are driven from Gemini’s **Filter**. Any item that matches the selected filter will appear on the board regardless of the project they are in. Items from different projects will sit in the same lane by matching on the lane name. For example if we set the board to show sprints then all items that belong to “Sprint 1” will be in the “Sprint 1” lane even if they belong to different projects thus allowing us to cover one sprint across multiple projects and teams.

Gemini’s agile board is quite unique in its space as it allows you to page through your board’s lanes thus improving the performance when you have to deal with a significant backlog size.

### Accessing the board

You can access the board via the top “Board” menu in Gemini:

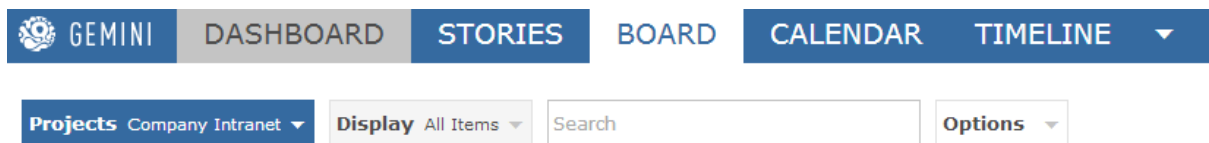


Figure 1 - Click on the "Board" menu option

If the board menu is not displaying you must edit the **workspace** you are in and tick the “Board” view:

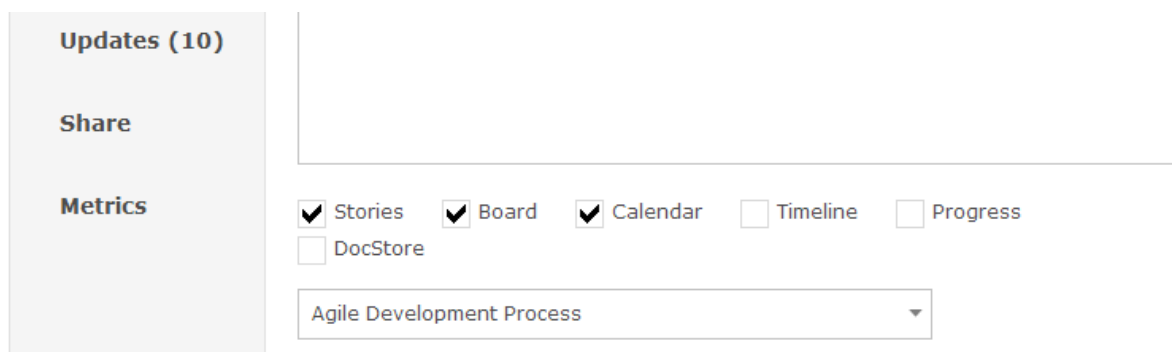


Figure 2 - Edit the workspace and enable the "Board" view

## The board sections

The board page is divided into 3 main sections:

1. **The filter** – This controls which work items are displayed on the board.
2. The board controls – Controls that allows you to configure the board view, such as the columns to show.
3. The board columns – The actual board view including the work items as cards.

You can see all these sections in the following screenshot:

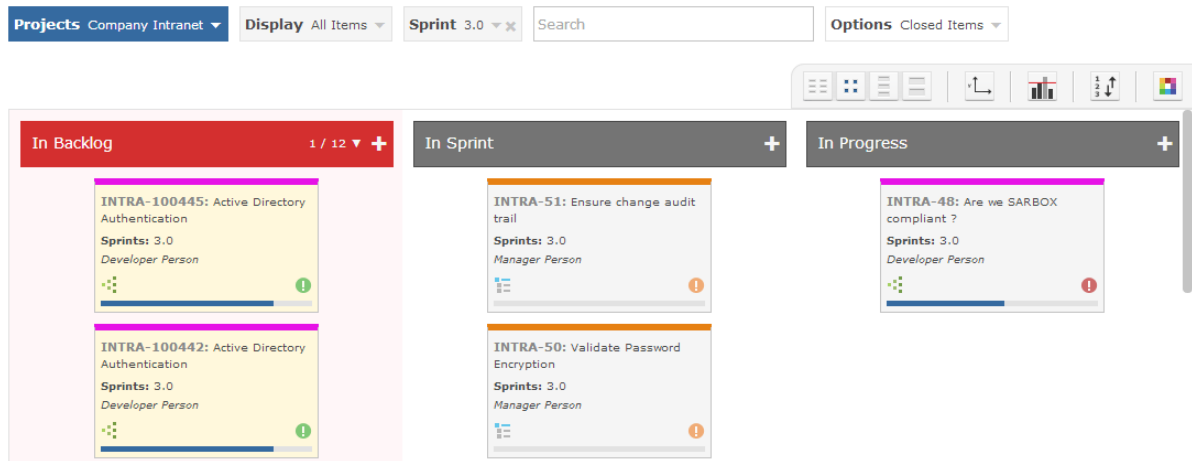


Figure 3 - The three sections of the board page

## The board controls



Figure 4 - The board controls

### 1. The zoom section

These toggle buttons control the granularity of details shown on each card. There are 4 zoom levels each allows you to show more or less cards per page:

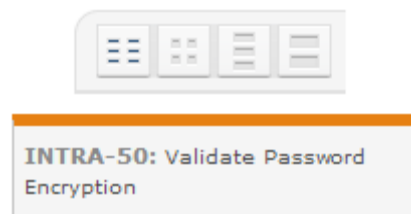


Figure 5 - The minimal amount of data shown on the card

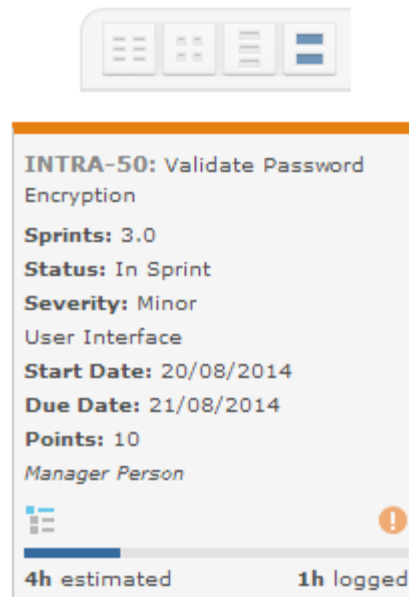


Figure 6 - The full zoom view

As you can see from **figures 5 & 6**, you can control the height of the card thus showing more cards per viewable page. The full view, **figure 6**, shows all the data that can be viewed on a card. At the top you can see the item key with its title and at the bottom you can see the type of the item, priority and progress. The minimal view, **figure 5**, shows the item key and title only.

## 2. The group by section

This option controls how the board should group items (columns and rows). You can group by one field as SCRUM / Kanban boards do or by two fields to further help segregate and visualize the data. You can also control the order of grouping using the arrows next to the selection boxes as shown in **figure 7**.

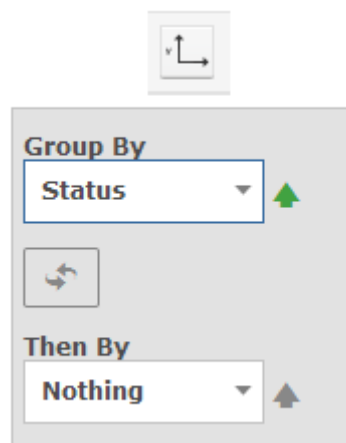


Figure 7 - The group by options

The available fields to group by are:

- Area

- Due Date
- Sprint
- Points
- Priority
- Project
- Resource
- Severity
- Start Date
- Status
- Type

The board is fully aware of Gemini’s fields restrictions and will not show fields that you are not allowed to view. Therefore if you don’t see some of the fields above in the group by box then please make sure that you are allowed to view these fields in the view screen of all the item types for your project template(s).

When grouping by a single field the board will only show columns / lanes:

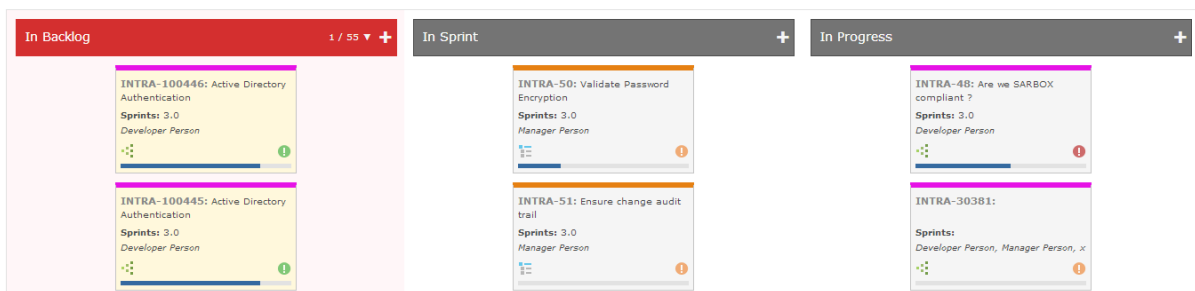


Figure 8 - Status group by

You can restrict the columns shown by filtering on selected values. For example to only show the statuses “In Backlog”, “In Sprint” and “In Progress”, as per **figure 8**, filter on these statuses only in the status filter box, see **figure 9**.

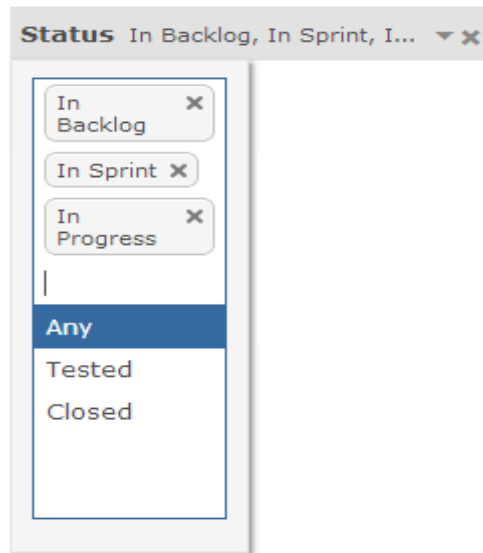


Figure 9 - Use the filter to restrict the columns

Now you can update each item (card) by dragging and dropping it to the desired state:

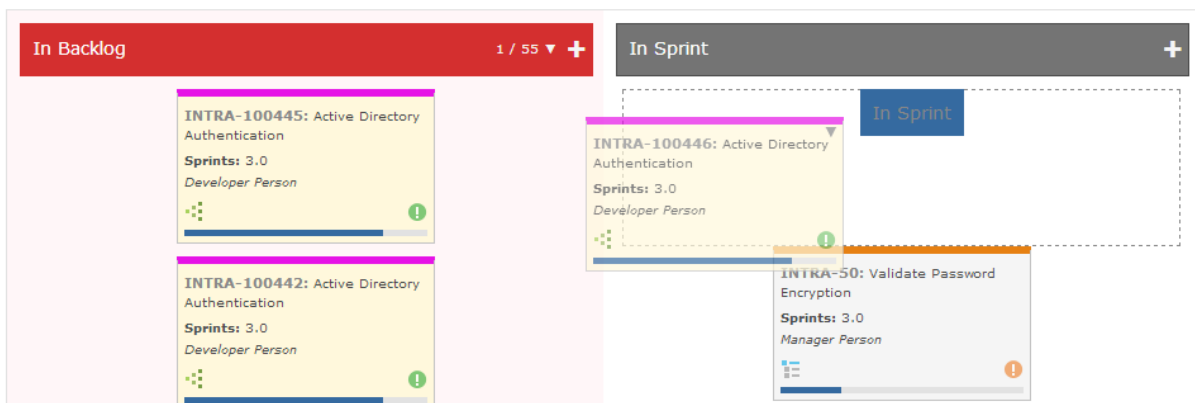


Figure 10 - Moving INTRA-100446 to "In Sprint"

The board can also group by two fields in which case it will be made out of columns and rows:

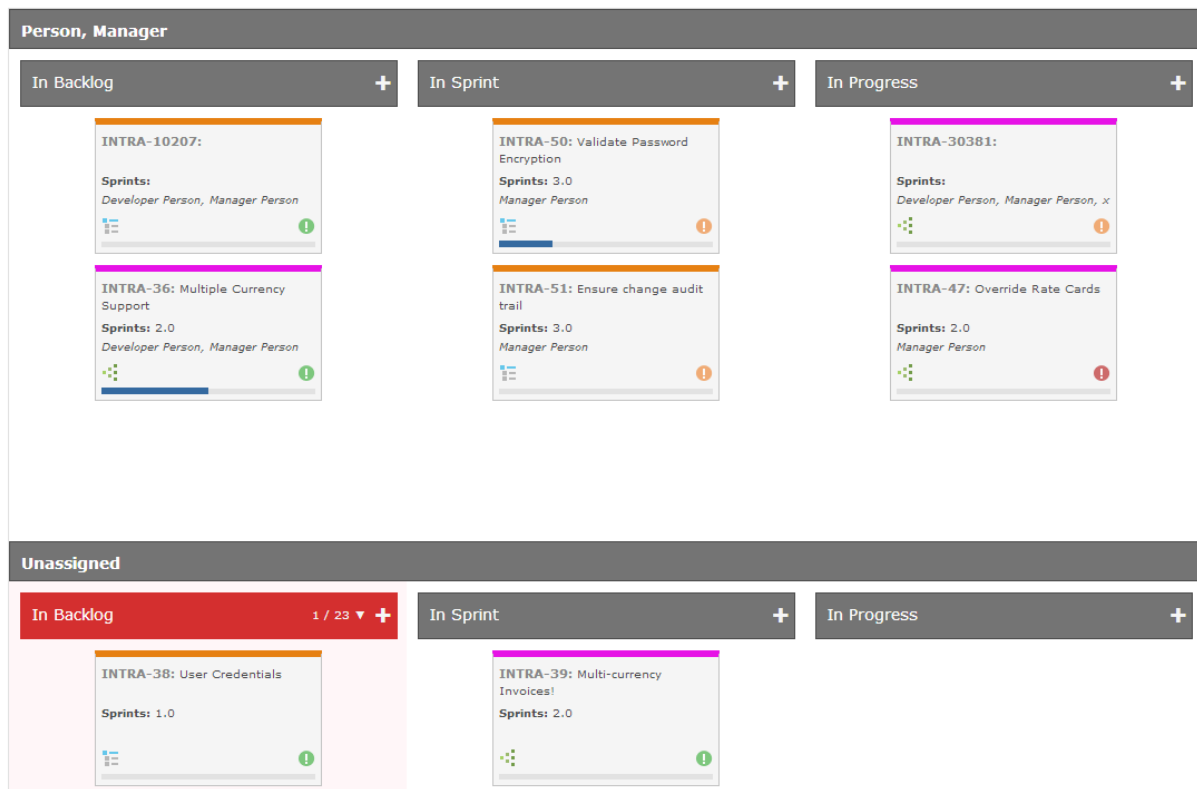


Figure 11 - Grouping by Status and Resource

Figure 11 shows the board grouping by status and resource. That way we can manage our items quite easily in a meeting.

The board will enforce permissions and if you cannot edit an item and you try to drag & drop it then the move operation will be cancelled. The same applies for workflow, if you are not allowed to move the item between two states then the move will be cancelled and the card will return to the source lane.

You can also determine the order of the columns and rows by toggling the order by arrow, see the green arrow in figure 7:

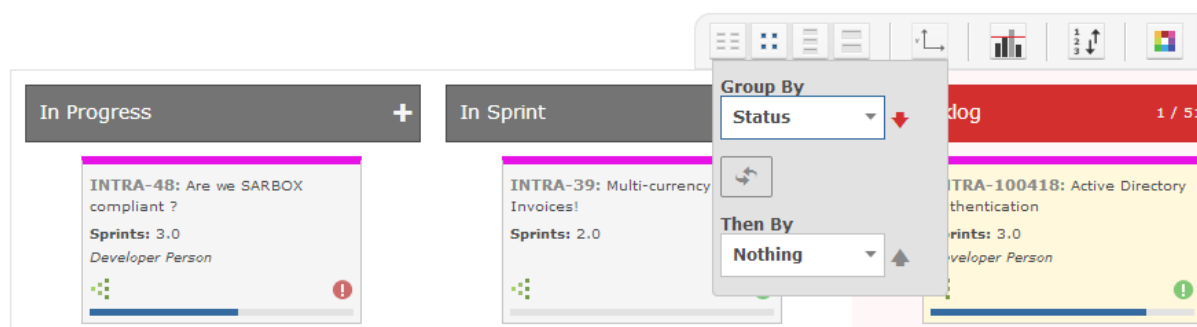


Figure 12 - Sort the status field in descending order

Note that the ordering is not done alphabetically and takes the actual order defined in the customize section. In this example, figure 12, it will take the status order as defined in the Customize -> Templates -> Status.



There are a few fields that will show an extra lane when selected to indicate the “no value” lane, the fields are:

- Area
- Due Date
- Sprint
- Resource

When one of these fields is selected in the group by option Gemini will add an extra lane / row to indicate the “Unassigned” value.

### 3. The lane limits section

This option allows you to highlight lanes that exceed the set limit, just like a Kanban board would for work in progress.

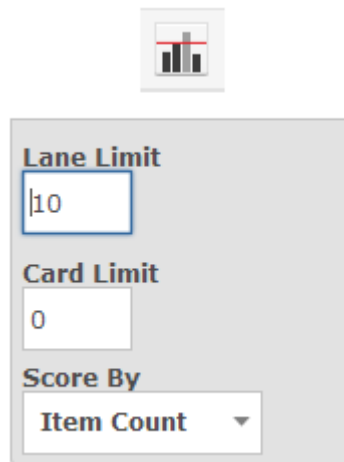


Figure 13 - Lane limits settings

Here you can set the limit for the lanes, how to calculate the limit (item count, points or estimated effort) and what is the maximum number of cards to show on the board. If a lane goes over the set limit (10 items in this example), it will be highlighted in a red background and will show the paging control on the lane:

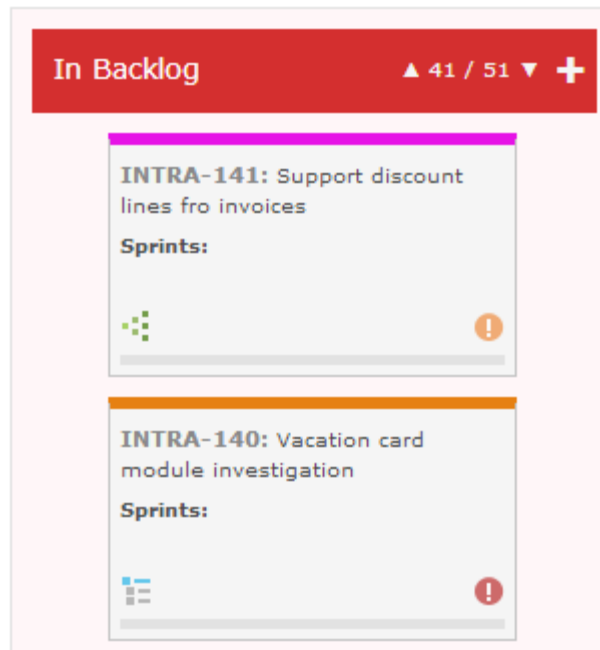


Figure 14 - The lane is highlighted and the paging control is shown

You can page through the cards in the lane using the up / down arrows of the paging control, see the top right of **figure 14**. The paging control will display how the total sum of the items (count, effort or points) and where we are in the paging hierarchy. In the example above we are at item 41 out of 51 items since we are limiting by item count.

If a lane has not exceeded the set limit then the background will be off black and white. However, if you move a card to such lane and that card is causing the lane to exceed its limits then the lane's background will turn to red to inform you that your limit has been breached.

Hovering over the lane header will display summary of all items in that lane:

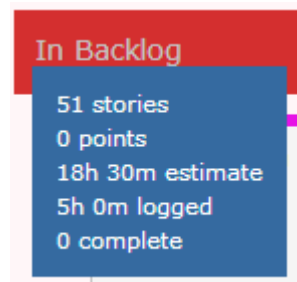


Figure 15 - Lane summary

The lane limit options are:

- Item Count – Lane limits will count how many items are in the lane. This is used mainly when using Kanban agile methodology
- Points – Mainly used in the SCRUM agile methodology. Lane limits will sum each item's points field.

- Estimated Effort – The agile board’s lanes will sum the estimated effort in minutes for each item. This is another way of doing SCRUM.

#### 4. The order by section

You can define the order of cards within the lane by using this option. You can select the field and whether to sort ascending or descending. You can also have a second field to order by in case the first field is the same for a few cards.

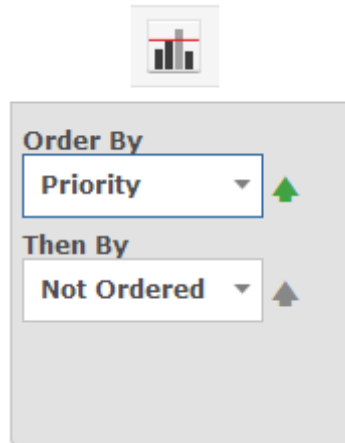


Figure 16 - Ordering cards within the lane

You can also reorder cards in the lane / cell by dragging and dropping them in the desired location within the lane. In such case the card’s order will be the one the user created followed by the order by setting of the board.

#### 5. The color by section

Gemini’s board allows you to control the color of each card by specifying which fields’ color to use.

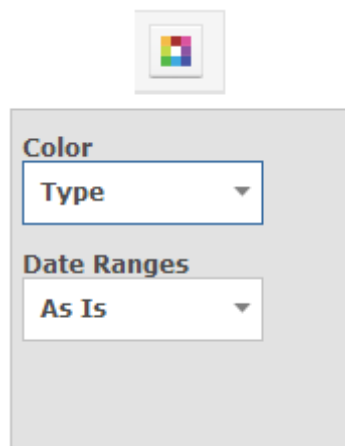


Figure 17 - Color the cards by type

The cards’ thin line will change per item type in this case, see **figure 14**. This allows you to quickly distinguish between cards (items) while grouping by other fields.

You can also specify the way the board will display dates when grouping by start / due dates. You can keep “As Is”, in which case the board will just show the dates the cards belong to or you can set it to “Daily” so the board will plot each day from the minimum date to the maximum date. This is useful for planning as you will see each day and can drag & drop cards to other days. The other options are “Weekly” to show the start of each week or “Monthly” to show the start of each month.

## 6. Advanced usage

The agile board allows you to plot by the resource and area fields which may have the same card in multiple lanes due to the card being associated with more than one resource or area.

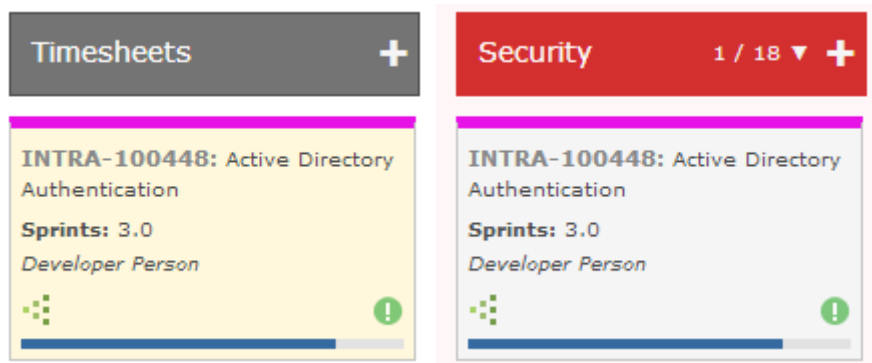


Figure 18 - Cards appearing in multiple lanes

To assign a card to multiple lane hold the CTRL key while dragging the card. This will duplicate the card to the target lane instead of moving it. If a card is in multiple lanes and you drag & drop it without holding the CTRL key then the item will be removed from all other lanes that are showing it.

You can move cards from one lane to another while keeping it in other lanes by holding the SHIFT key while dragging the card.

## 7. Adding new cards

You can add new cards to each lane by clicking the “+” icon on the lane’s header. This will bring up the add item popup which will default to the lanes data. For example if we click on the “+” icon of the Timesheets lane (**figure 18**) then the add popup will default the area to timesheets.

As you can see Gemini’s planning board is very flexible and easy to use.