

CWDS SM Procedure 106 – Updating Epics Status in the Schedule Update Report

Audience: CWDS Service Managers and Scrum Masters
 Frequency: Every Status Week
 Created: 9/7/2016
 Last Updated: 9/7/2016

After reading this procedure you will be able to use the Schedule Update Sheets and Pivotal Tracker to update the status of the Epics in the Project Master Schedule and to add Epics to the Project Master Schedule.

Prerequisites:

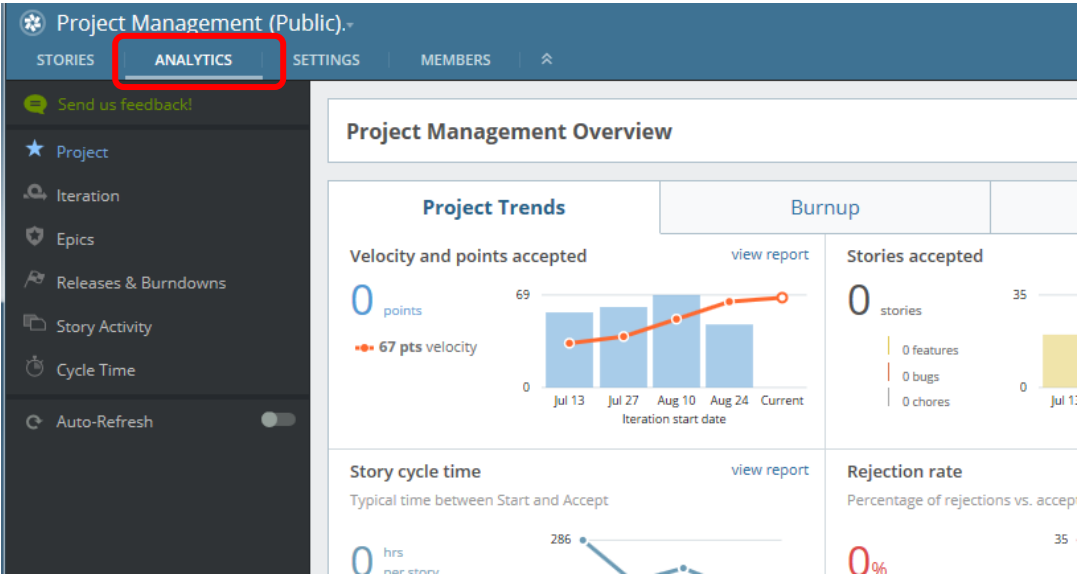
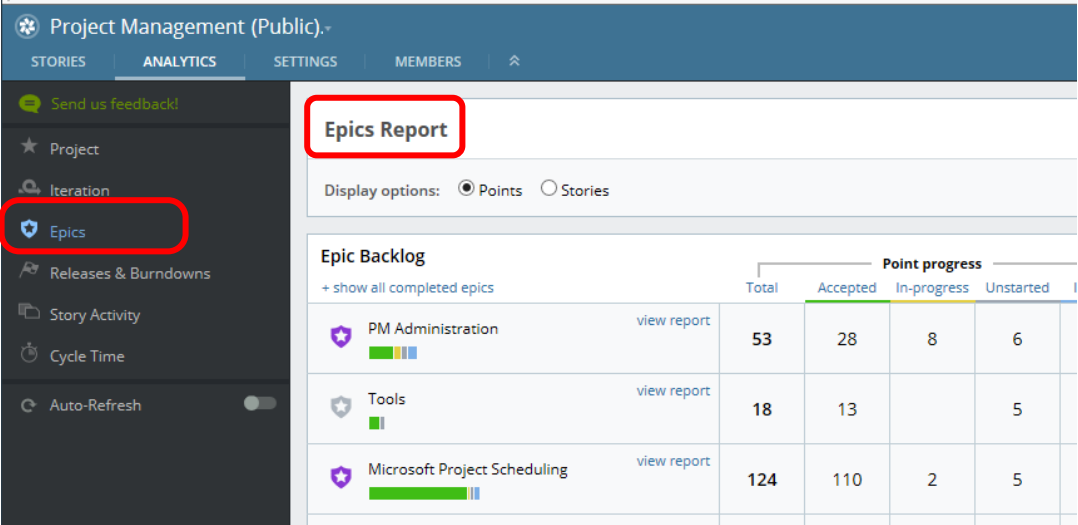
- Schedule Update Report for your team.
- Pivotal Tracker
- *CWDS Procedure 101 – Producing the Schedule Update Report*
- Presentation *CWDS PMO Tracking Epics in the Project Master Schedule*

Part 1. Accessing the Schedule Update Sheet:

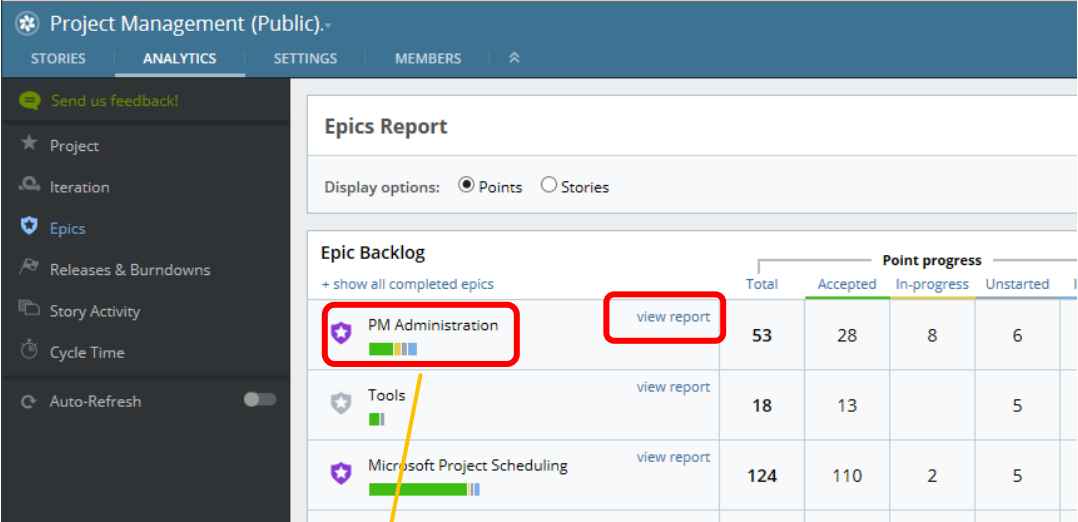
Step	Description																																																																																																																					
1.	See CWDS SM Procedure 101 – Producing the Schedule Update Report , Part 2 for instructions on locating and editing the Schedule Update Sheets.																																																																																																																					
2.	Locate the Epics that require review on your team’s Schedule Update Sheet. Example : <div style="text-align: right; margin-top: 10px;"> CWDS Biweekly Status Updates PMO Team - Shannon Newby Week Ending 09/02/2016 </div> <table border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th>UID</th> <th>Plan Status</th> <th>Task Name</th> <th>Summary</th> <th>Task Lead</th> <th>Planned Duration</th> <th>% complete</th> <th>Planned Start</th> <th>Planned Finish</th> </tr> </thead> <tbody> <tr> <td>7371</td> <td></td> <td>LDE_Change Control Operations</td> <td>Yes</td> <td>Cindy</td> <td>502 days</td> <td>82%</td> <td>Fri 12/15</td> <td>Tue 1/31/17</td> </tr> <tr> <td>7378</td> <td></td> <td>LDE_Q3 2016 (Jul-Sep) Change Control Execution</td> <td>No</td> <td>Cindy</td> <td>62 days</td> <td>66%</td> <td>Fri 7/16</td> <td>Wed 9/28/16</td> </tr> <tr> <td>9500</td> <td></td> <td>PMO Epics</td> <td>Yes</td> <td></td> <td>231 days</td> <td>68%</td> <td>Tue 12/29/15</td> <td>Tue 11/29/16</td> </tr> <tr> <td>9383</td> <td>●</td> <td>Epic ##2853417 - PM Administration</td> <td>No</td> <td></td> <td>21 days</td> <td>63%</td> <td>Mon 8/8/16</td> <td>Tue 9/6/16</td> </tr> <tr> <td>9493</td> <td></td> <td>Epic ##2717309 - Tools</td> <td>No</td> <td></td> <td>91 days</td> <td>75%</td> <td>Fri 7/8/16</td> <td>Tue 11/15/16</td> </tr> <tr> <td>9494</td> <td>●</td> <td>Epic ##2372789 - Microsoft Project Scheduling</td> <td>No</td> <td></td> <td>119 days</td> <td>95%</td> <td>Mon 3/7/16</td> <td>Tue 8/23/16</td> </tr> <tr> <td>9495</td> <td></td> <td>Epic ##2372785 - Agile Digital Service</td> <td>No</td> <td></td> <td>104 days</td> <td>67%</td> <td>Mon 5/9/16</td> <td>Tue 10/4/16</td> </tr> <tr> <td>9496</td> <td></td> <td>Epic ##2350017 - PM Plan</td> <td>No</td> <td></td> <td>178 days</td> <td>63%</td> <td>Mon 2/22/16</td> <td>Tue 11/16</td> </tr> <tr> <td>9497</td> <td></td> <td>Epic ##2250464 - PM Training</td> <td>No</td> <td></td> <td>209 days</td> <td>43%</td> <td>Mon 2/1/16</td> <td>Tue 11/23/16</td> </tr> <tr> <td>9498</td> <td></td> <td>Epic ##2250452 - PM Processes and Procedures</td> <td>No</td> <td></td> <td>188 days</td> <td>66%</td> <td>Tue 1/5/16</td> <td>Fri 9/30/16</td> </tr> <tr> <td>9499</td> <td></td> <td>Epic ##2250450 - PM Governance</td> <td>No</td> <td></td> <td>214 days</td> <td>86%</td> <td>Tue 12/29/15</td> <td>Tue 11/16</td> </tr> <tr> <td>9382</td> <td></td> <td>Epic ##2250456 - PM Reporting</td> <td>No</td> <td></td> <td>208 days</td> <td>41%</td> <td>Thu 1/7/16</td> <td>Tue 11/16</td> </tr> </tbody> </table>	UID	Plan Status	Task Name	Summary	Task Lead	Planned Duration	% complete	Planned Start	Planned Finish	7371		LDE_Change Control Operations	Yes	Cindy	502 days	82%	Fri 12/15	Tue 1/31/17	7378		LDE_Q3 2016 (Jul-Sep) Change Control Execution	No	Cindy	62 days	66%	Fri 7/16	Wed 9/28/16	9500		PMO Epics	Yes		231 days	68%	Tue 12/29/15	Tue 11/29/16	9383	●	Epic ##2853417 - PM Administration	No		21 days	63%	Mon 8/8/16	Tue 9/6/16	9493		Epic ##2717309 - Tools	No		91 days	75%	Fri 7/8/16	Tue 11/15/16	9494	●	Epic ##2372789 - Microsoft Project Scheduling	No		119 days	95%	Mon 3/7/16	Tue 8/23/16	9495		Epic ##2372785 - Agile Digital Service	No		104 days	67%	Mon 5/9/16	Tue 10/4/16	9496		Epic ##2350017 - PM Plan	No		178 days	63%	Mon 2/22/16	Tue 11/16	9497		Epic ##2250464 - PM Training	No		209 days	43%	Mon 2/1/16	Tue 11/23/16	9498		Epic ##2250452 - PM Processes and Procedures	No		188 days	66%	Tue 1/5/16	Fri 9/30/16	9499		Epic ##2250450 - PM Governance	No		214 days	86%	Tue 12/29/15	Tue 11/16	9382		Epic ##2250456 - PM Reporting	No		208 days	41%	Thu 1/7/16	Tue 11/16
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End of Part 1

Part 2: Locate the Epic Status Information in Pivotal Tracker

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1.	<p>In Pivotal Tracker, when viewing your team’s project, open the Analytics page.</p>  <p>The screenshot shows the 'Project Management Overview' page. The top navigation bar includes 'STORIES', 'ANALYTICS' (highlighted with a red box), 'SETTINGS', and 'MEMBERS'. The left sidebar contains navigation options: 'Project', 'Iteration', 'Epics', 'Releases & Burndowns', 'Story Activity', 'Cycle Time', and 'Auto-Refresh'. The main content area displays 'Project Trends' with a velocity chart showing 67 pts velocity, 'Burnup' chart, 'Stories accepted' (0 stories), 'Story cycle time' (286 hrs), and 'Rejection rate' (0%).</p>																												
2.	<p>On the Analytics Page, Select the Epics report</p>  <p>The screenshot shows the 'Analytics' page. The 'ANALYTICS' tab is selected in the top navigation bar. The left sidebar has 'Epics' highlighted with a red box. The main content area displays the 'Epics Report' section, which includes a table of epic backlog items. The 'Epics Report' title is also highlighted with a red box.</p> <table border="1" data-bbox="511 1255 1279 1535"> <thead> <tr> <th colspan="2" rowspan="2">Epic Backlog</th> <th colspan="4">Point progress</th> </tr> <tr> <th>Total</th> <th>Accepted</th> <th>In-progress</th> <th>Unstarted</th> </tr> </thead> <tbody> <tr> <td></td> <td>PM Administration </td> <td>53</td> <td>28</td> <td>8</td> <td>6</td> </tr> <tr> <td></td> <td>Tools </td> <td>18</td> <td>13</td> <td></td> <td>5</td> </tr> <tr> <td></td> <td>Microsoft Project Scheduling </td> <td>124</td> <td>110</td> <td>2</td> <td>5</td> </tr> </tbody> </table>	Epic Backlog		Point progress				Total	Accepted	In-progress	Unstarted		PM Administration 	53	28	8	6		Tools 	18	13		5		Microsoft Project Scheduling 	124	110	2	5
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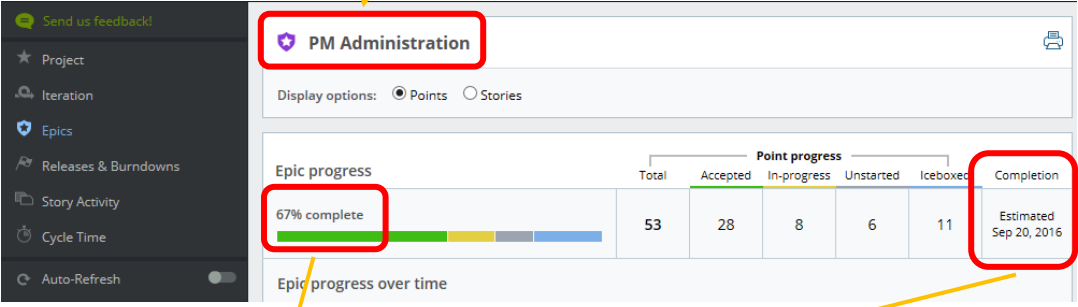
Step 3. Select “view report” for a specific Epic to view that Epic’s status report



The screenshot shows the 'Epics Report' for 'PM Administration'. The 'view report' link is highlighted with a red box. The table below shows the point progress for three epics:

Epic Name	Total	Point progress		
		Accepted	In-progress	Unstarted
PM Administration	53	28	8	6
Tools	18	13		5
Microsoft Project Scheduling	124	110	2	5

Step 4. Locate the Epic’s Completion Date and the % Complete.



The screenshot shows the detailed view of the 'PM Administration' epic. The '67% complete' bar and the 'Estimated Sep 20, 2016' completion date are highlighted with red boxes. The table below shows the completion status for the epic:

Total	Point progress				Completion
	Accepted	In-progress	Unstarted	Iceboxed	
53	28	8	6	11	Estimated Sep 20, 2016

Step 5. Update the Epic information in the Schedule Update Sheet as needed.

Pivotal Tracker Completion Date
= Schedule Update Sheet - *Updated Finish* (Grey column)

Pivotal Tracker % Complete
= Schedule Update Sheet - *Updated % Complete* (Grey Column)

CWDS Biweekly Status Updates
PMO Team - Shannon Newby
Week Ending 09/02/2016

ID	UID	Plan Status	Task Name	Summary	Task Lead	Planned Duration	% complete	Planned Start	Planned Finish	Updated Start	Updated Finish	Updated % Complete
6382	7371		LOE_Change Control Operations	Yes	Cindy	502 days	82%	Fri 12/15	Tue 1/3/17			
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6402	9383	●	Epic ##2853417 - PM Administration	No		21 days	69%	Mon 8/9/16	Tue 9/6/16			
6403	9493		Epic ##2717309 - Tools	No		91 days	75%	Fri 7/8/16	Tue 11/9/16			

End of Part 2

Part 3: Adding Epics to the Master Schedule.

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1.	<p>Epics that are not on the Master Schedule are added through the Schedule Update Sheets. The information needed to add an Epic to the Master Schedule is:</p> <p>Task Name: Format “Epic” + Epic ID + “-“ + Epic Name Epic Start Date: See instructions below Epic Finish Date: See instructions in Part 2 above Epic % Complete: See instructions in Part 2 above</p> <p>For Epic <i>PM Administration</i>, the Task Name is: <i>Epic ##2853417 - PM Administration</i></p> <table border="1" data-bbox="207 751 1276 1161"> <caption style="text-align: center;">CWDS Biweekly Status Updates PMO Team - Shannon Newby Week Ending 09/02/2016</caption> <thead> <tr> <th>ID</th> <th>UID</th> <th>Plan Status</th> <th>Task Name</th> <th>Summary</th> <th>Task Lead</th> <th>Planned Duration</th> <th>% complete</th> <th>Planned Start</th> <th>Planned Finish</th> <th>Updated Start</th> <th>Updated Finish</th> <th>Updated % Complete</th> </tr> </thead> <tbody> <tr> <td>6382</td> <td>7371</td> <td></td> <td>LDE_Change Control Operations</td> <td>Yes</td> <td>Cindy</td> <td>502 days</td> <td>82%</td> <td>Fri 12/15</td> <td>Tue 12/31/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6389</td> <td>7378</td> <td></td> <td>LDE_Q3 2016 (Jul-Sep) Change Control Execution</td> <td>No</td> <td>Cindy</td> <td>62 days</td> <td>66%</td> <td>Fri 7/1/16</td> <td>Wed 9/28/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6400</td> <td>9500</td> <td></td> <td>PMO Epics</td> <td>Yes</td> <td></td> <td>231 days</td> <td>68%</td> <td>Tue 12/29/15</td> <td>Tue 11/29/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6402</td> <td>9383</td> <td>●</td> <td>Epic ##2853417 - PM Administration</td> <td>No</td> <td></td> <td>21 days</td> <td>63%</td> <td>Mon 8/9/16</td> <td>Tue 9/6/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6403</td> <td>9493</td> <td></td> <td>Epic ##2717309 - Tools</td> <td>No</td> <td></td> <td>91 days</td> <td>75%</td> <td>Fri 7/8/16</td> <td>Tue 11/15/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6404</td> <td>9494</td> <td>●</td> <td>Epic ##2372789 - Microsoft Project Scheduling</td> <td>No</td> <td></td> <td>119 days</td> <td>95%</td> <td>Mon 3/7/16</td> <td>Tue 8/23/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td>6410</td> <td>9382</td> <td></td> <td>Epic ##2250456 - PM Reporting</td> <td>No</td> <td></td> <td>208 days</td> <td>41%</td> <td>Thu 1/7/16</td> <td>Tue 11/16</td> <td></td> <td></td> <td></td> </tr> <tr> <td></td> <td></td> <td></td> <td>Epic ##2853417 - PM Administration</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> <td></td> </tr> </tbody> </table>	ID	UID	Plan Status	Task Name	Summary	Task Lead	Planned Duration	% complete	Planned Start	Planned Finish	Updated Start	Updated Finish	Updated % Complete	6382	7371		LDE_Change Control Operations	Yes	Cindy	502 days	82%	Fri 12/15	Tue 12/31/16				6389	7378		LDE_Q3 2016 (Jul-Sep) Change Control Execution	No	Cindy	62 days	66%	Fri 7/1/16	Wed 9/28/16				6400	9500		PMO Epics	Yes		231 days	68%	Tue 12/29/15	Tue 11/29/16				6402	9383	●	Epic ##2853417 - PM Administration	No		21 days	63%	Mon 8/9/16	Tue 9/6/16				6403	9493		Epic ##2717309 - Tools	No		91 days	75%	Fri 7/8/16	Tue 11/15/16				6404	9494	●	Epic ##2372789 - Microsoft Project Scheduling	No		119 days	95%	Mon 3/7/16	Tue 8/23/16				6410	9382		Epic ##2250456 - PM Reporting	No		208 days	41%	Thu 1/7/16	Tue 11/16							Epic ##2853417 - PM Administration									
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2.	<p>Epics with active stories - the Start date for Epics is the start date of the iteration/Sprint where the first completed story (of the stories assigned to the Epic) was accepted.</p> <p>For Epic <i>Epic ##2250456 - PM Reporting</i>, Story <i>REPORT 8 - Define a common method for conducting sprint retrospectives</i> was accepted on 1/25/16, which was during PMO Sprint 1, which started on 1/13/2016.</p> <p>So the start date for Epic <i>Epic ##2250456 - PM Reporting</i> is 1/13/2016</p> <p>See presentation <i>Tracking Epics in the Master Schedule</i> for a overview of locating the Epic Start Date.</p>																																																																																																																					

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3.	<p>Epics with no active stories - the values for the fields required for the Master Schedule will be:</p> <p>Start Date: Start Date of the Release the Epic is intended to be completed within</p> <p>Completion Date: The Completion Date of the Release the Epic is intended to be completed within</p> <p>% Complete: 0%</p>

End of Part 3

End of Procedure