



Agile Backlog and Sprint Planning

Template Set Getting Started Guide

The Agile Backlog and Sprint Planning template set provides an easy way to track sprints and development backlogs using the Agile methodology.

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REQUIREMENTS: This template set has been designed to utilize the full suite of functionality available in Smartsheet. Select plans do not have access to all premium features like Dashboards, Automated Actions, and Activity Log. If you are on a limited plan you can still use the template set however not all premium functionality will be available. [Click here](#) to see a list of discontinued plans.

Get the Template Set

Click the link below and the template set will be added to your Sheets folder, you can find it on the left side of the screen under Sheets.

[Agile Backlog and Sprint Planning Template Set](#)

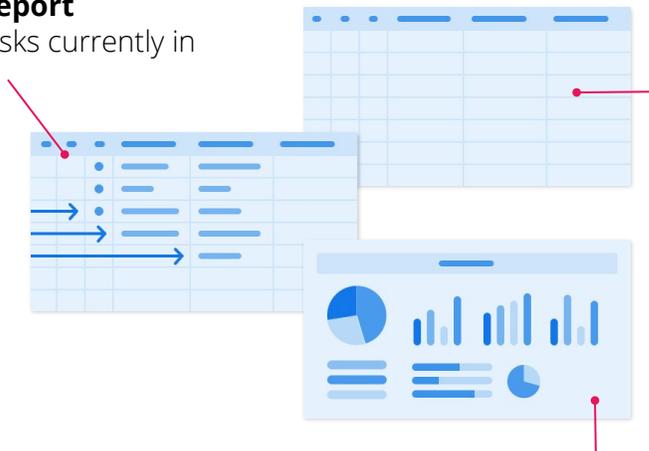


What's Included in the Set

With the Agile Backlog and Sprint Planning template set, you can accelerate work execution and run more effective Agile projects.

In Progress Task Report

A live display of all tasks currently in progress.



Backlog & Sprint Planner Sheet

Track and manage your backlog and all of the sprints per release.

Backlog and Sprints Dashboard

A dashboard that summarizes key metrics about your Agile project in real-time.

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Set Up



Using a [workspace](#) is a best practice when building a collaborative process. Workspaces allow you to centralize your work and control sharing with different stakeholders.

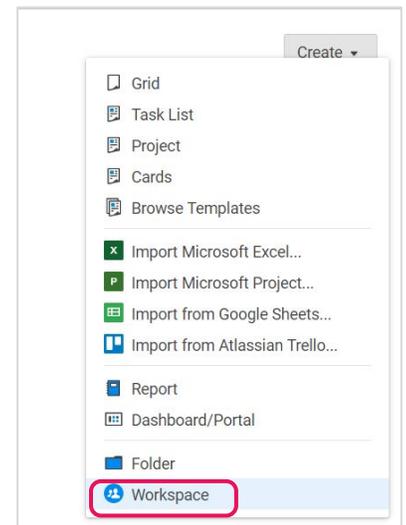
Step 1:

Create a New Workspace

Open *Home*. From the home menu, click the *Create* button in the upper right hand corner. From the drop-down menu, select *Workspace*. Name the workspace.

Learn more:

[Workspaces Overview](#), [Workspace Sharing](#), [Home Tab](#)



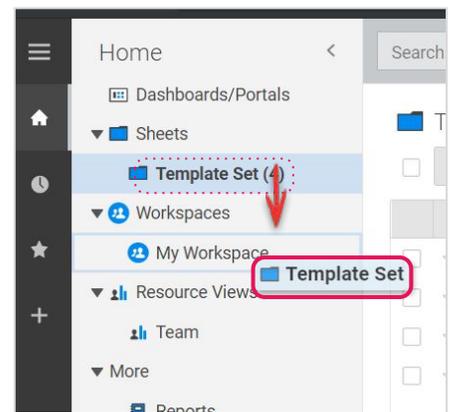
Step 2:

Drag the Files into Workspace

Select the template set folder under your *Sheets* folder. Drag and drop the folder down to the workspace you just created.

Learn more:

[Manage Items in a Workspace \(Add, Move, Remove\)](#)



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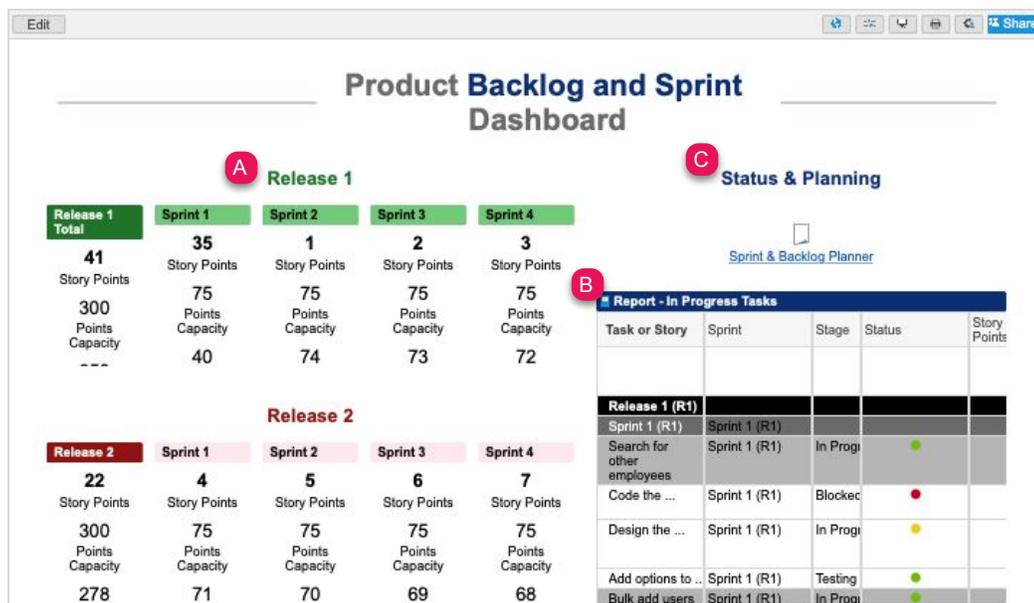
Customize

Step 3:

Setup the Backlog and Sprint Dashboard

The Backlog and Sprint dashboard summarizes the key information in real-time that you want to track for your Agile project. Dashboards consist of different widgets that pull in live data from other sheets and reports.

- A. All of the Release 1 and Release 2 values are *Metric* widgets that are pulling in live data from the Backlog & Sprint Planner sheet.
- B. In Progress Tasks is a *Report* widget that displays the live report in the dashboard.
- C. Status & Planning is a *Shortcut* widget with links to your other sheets and reports. Feel free to add a shortcut to other documents and resources.



Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#)

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Step 4:

Modify the Backlog & Sprint Planner Sheet

The Backlog & Sprint Planner sheet is where you will track and manage your backlog and all of the sprints per release. The sheet contains summary formulas that sum up Story Points, Points Capacity, and Points Available for each sprint and release. The data gleaned from these formulas will appear in the Backlog and Sprints dashboard.

- A. Hierarchy organizes the sheet into releases, sprints, stories, and tasks. Enter the appropriate information in each row based on where it is in the hierarchy.
- B. Edit the *Sprint*, *Type*, *Stage*, and *Story Points* dropdown list columns by right-clicking on the *relevant column* and clicking *Edit Column Properties*.
- C. The Status column is a Symbol column that uses red, yellow, green, and gray balls to denote the status of a Story or Task.
- D. Add contacts in the *Assigned To* column by creating a new contact, or adding an existing contact from your Contact List.
- E. Enter start and end dates in the designated columns.
- F. Add new stories and tasks to the backlog at the bottom of the sheet. When you're ready to add them to sprints, drag them up into the hierarchy above.

Sprint	Story or Task	Epic	Type	Description	Stage	Status	Story Points	Points Capacity	Points Available	Assigned To	Comments	Start Date	Finish Date
	Release 1 (R1)						41						
	Sprint 1 (R1)						35						
Sprint 1 (R1)	Search for other employees	Epic 1	Story	As an employee I want to search for other employees using their last name so that I can easily contact any colleague.	In Progress	●	21						
Sprint 1 (R1)	Code the ...	Epic 1	Task	<Describe the work needed to complete.>	Blocked	●	8				We are blocked on coding until all team resources have access.	10/01/17	10/07/17
Sprint 1 (R1)	Design the ...	Epic 1	Task	<Describe the work needed to complete.>	In Progress	●	5				Designs are in progress. Additional design prototypes could require additional funding.	10/01/17	
Sprint 1 (R1)	Add options to ...	Epic 1	Task	<Describe the work needed to complete.>	Testing	●	6				Testing is in progress	10/01/17	
Sprint 1 (R1)	Integrate with ...	Epic 1	Task	<Describe the work needed to complete.>	Done	●	2				All integration points are coded and tested.	10/01/17	10/08/17
Sprint 1 (R1)	Bulk add users	Epic 2	Story		In Progress	●	13					10/01/17	
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	In Progress	●	4					10/01/17	10/08/17
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Testing	●	2					10/01/17	
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Done	●	4					10/01/17	
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Done	●	3					10/01/17	10/08/17
Sprint 1 (R1)	<Defect Name>	N/A	Defect	<Describe the work needed to complete.>	Blocked	●	1						
Sprint 2 (R1)	Sprint 2 (R1)							75	74				
Sprint 2 (R1)	<Story name>	Epic 1	Story	<Describe the story>	Not Started	●	1						
Sprint 2 (R1)	<Task>	Epic 1	Task	<Describe the work needed to complete.>	Not Started	●	1						
Sprint 3 (R1)	Sprint 3 (R1)							75	73				
Sprint 3 (R1)	<Story name>	Epic 1	Story	<Describe the story>	Not Started	●	2						
Sprint 3 (R1)	<Task>			<Describe the work needed to complete.>	Not Started	●	2						

Learn more:

[Upload an Attachment](#), [Dropdown List Column Type](#), [Symbols Column Type \(i.e. Status symbols, Decision symbols, etc.\)](#), [Using Column Symbols](#), [Date Column Type](#), [Contact List Column Type](#), [Hierarchy, Insert, Delete, or Rename Columns](#)

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Step 5:

View Summary Info with Pre-Built Formulas

In the Backlog & Sprint Planner sheet, the black *Release* rows, dark gray *Sprint* rows, and light gray *Story* rows all contain formulas to sum up the total *Story Points*, *Points Capacity*, and *Points Available* for each sprint and release. These metrics appear in the Backlog and Sprints dashboard, so you should lock the rows that have formulas to avoid editor changes. First, you must set the points capacity in the dark blue cell for each Sprint. Here are the formulas included in the sheet:

- A. Total Story Points hierarchy:
=SUM(CHILDREN())
- B. Total Points Capacity per Release:
=SUM(CHILDREN())
- C. Total Points Available per hierarchy row:
=[Points Capacity]2 - [Story Points]2

Sprint	Story or Task	Epic	Type	Description	Stage	Status	Story Points	Points Capacity	Points Available	Assigned To	Comments
	Release 1 (R1)						41	300	=[Points Capacity]2 - [Story Points]2		
Sprint 1 (R1)	Sprint 1 (R1)						35	75	40		
Sprint 1 (R1)	Search for other employees	Epic 1	Story	As an employee I want to search for other employees using their last name so that I can easily contact any colleague.	In Progress	●	21				
Sprint 1 (R1)	Code the ...	Epic 1	Task	<Describe the work needed to complete.>	Blocked	●	8			Anthony Gruenelli	We are blocked on cc have access.
Sprint 1 (R1)	Design the ...	Epic 1	Task	<Describe the work needed to complete.>	In Progress	●	5			Cari Franklin	Designs are in progre prototypes could req
Sprint 1 (R1)	Add options to ...	Epic 1	Task	<Describe the work needed to complete.>	Testing	●	6			Hiro Senjima	Testing is in progress
Sprint 1 (R1)	Integrate with ...	Epic 1	Task	<Describe the work needed to complete.>	Done	●	2			Alex Bright	All integration points i
Sprint 1 (R1)	Bulk add users	Epic 2	Story		In Progress	●	13				
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	In Progress	●	4				
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Testing	●	2				
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Done	●	4				
Sprint 1 (R1)	<Task>	Epic 2	Task	<Describe the work needed to complete.>	Done	●	3				
Sprint 1 (R1)	<Defect Name>	N/A	Defect	<Describe the work needed to complete.>	Blocked	●	1				
Sprint 2 (R1)	Sprint 2 (R1)						1	75	74		
Sprint 2 (R1)	<Story name>	Epic 1	Story	<Describe the story>	Not Started	●	1				
Sprint 2 (R1)	<Task>	Epic 1	Task	<Describe the work needed to complete.>	Not Started	●	1				
Sprint 3 (R1)	Sprint 3 (R1)						2	75	73		
Sprint 3 (R1)	<Story name>	Epic 1	Story	<Describe the story>	Not Started	●	2				
Sprint 3 (R1)	<Task>			<Describe the work needed to complete.>	Not Started	●	2				

Learn more:

[Formulas and Functions](#), [Hierarchy](#)

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Step 6:

Sheet Bonus: View or Edit Your Project Summary Data

For those with a *Business* or *Enterprise* plan, this template set utilizes the *sheet summary* feature. The Backlog & Sprint Planner sheet includes a pre-populated sheet summary that provides a standard, robust way to organize and report on project information in your sheet. Here you can see a quick recap of project scheduling status, stage, and project team allocations. Open the sheet summary on the right panel to view or edit your project summary fields. You can use formulas and reference another summary fields.

- Click the sheet summary icon to expand the sheet summary. You can expand and collapse the right panel to stay in the context of your sheet or maximize your sheet real estate when you don't need to view it.
- To add fields, click +New Field.
- Name your field and select the field type: Text/Number, Contact list, Date, Dropdown list, Checkbox, or Symbols.
- To edit the field properties, hover over the right side of the field and click on the vertical ellipsis (⋮) to open the field options dropdown menu.

Stage	Status	Story Points	Points Capacity	Poir Avail
		41	300	
		35	75	
In Progress	●	21		
Blocked	●	8		
In Progress	●	5		
Testing	●	6		
Done	●	2		
In Progress	●	13		
In Progress	●	4		
Testing	●	2		
Done	●	4		
Done	●	3		
Blocked	●	1		
		1	75	
Not Started	●	1		
Not Started	●	1		
		2	75	
Not Started	●	2		
Not Started	●	2		

Sheet Summary

Please provide feedback

Total Stage: Done $f(x)$
3

Total Stage: Blocked $f(x)$
2

Total Status: Red $f(x)$
2

Total Status: Yellow $f(x)$
2

Total Status: Green $f(x)$
7

Total Status: Gray $f(x)$
14

+ New Field

Learn more:

[Define Your Work with Sheet Summary](#), [Maximize Your Sheet Summary Usage](#), [Create a Portfolio View with a Summary Report](#)

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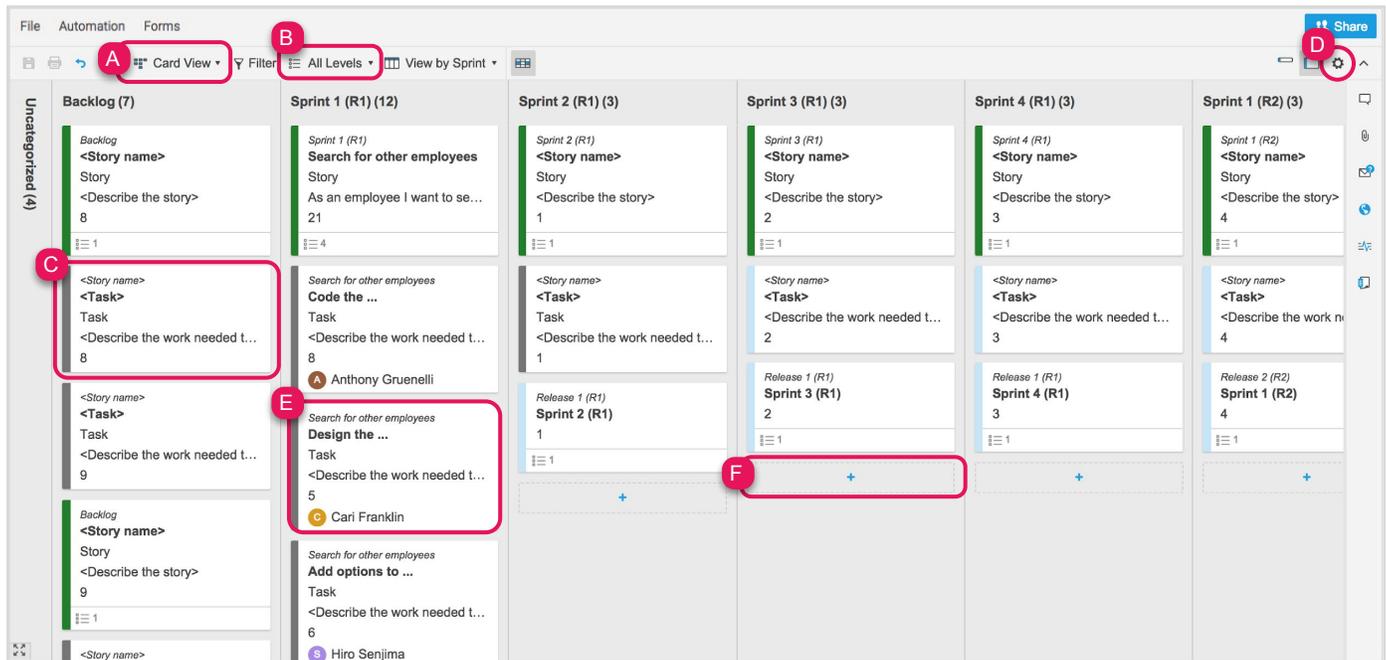
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Step 7:

Flip to Card View to Manage Task Stages

Card View is a visual way to manage the stages of each task in a sprint or your backlog. Cards are categorized into lanes, driven by Dropdown list, Contact list, and Symbol column types in your sheet.

- Click on the *Grid View* button in the toolbar to select *Card View* from the dropdown menu. The default Card View should be lanes by Sprint in Level 1.
- Change the hierarchy view of your cards by using the *Levels dropdown menu* in the toolbar. Select to view *All Levels*.
- Click and drag cards to prioritize and organize them in the lanes.
- Click on the gear icon in the top right corner to adjust your *Card View Settings* and define which fields you want to display in your cards.
- Double-click on a card to make edits.
- Add new cards by clicking the *+ button* in any lane.



Learn more:

[Card View](#), [Use Card View to Visualize Your Project](#), [Card View: Creating, Editing, and Sharing Cards](#)

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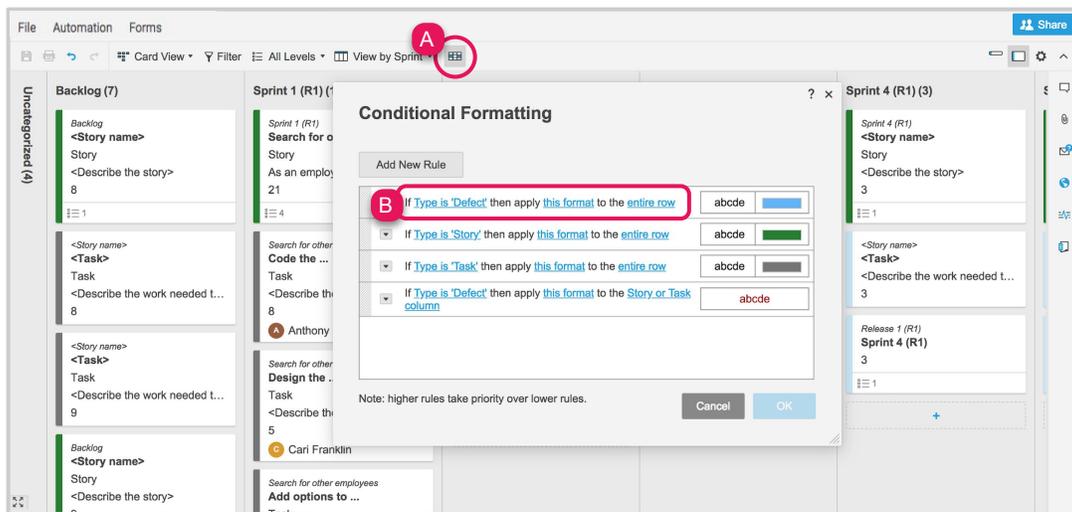
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Step 8:

Use Conditional Formatting to Set Rules in Card view

Conditional Formatting allows you to set rules on your sheet that will change the formatting of your sheet when certain criteria are met. The Backlog & Sprint Planner sheet has conditional formatting set in the Card View, so that you can color-code your cards based on Type.

- Click the *conditional formatting* button on the toolbar to open the conditional formatting window.
- Click the dropdown menu and edit the criteria.



Learn more:

[Conditional Formatting, Change the Color of Task Bars](#)

Step 9:

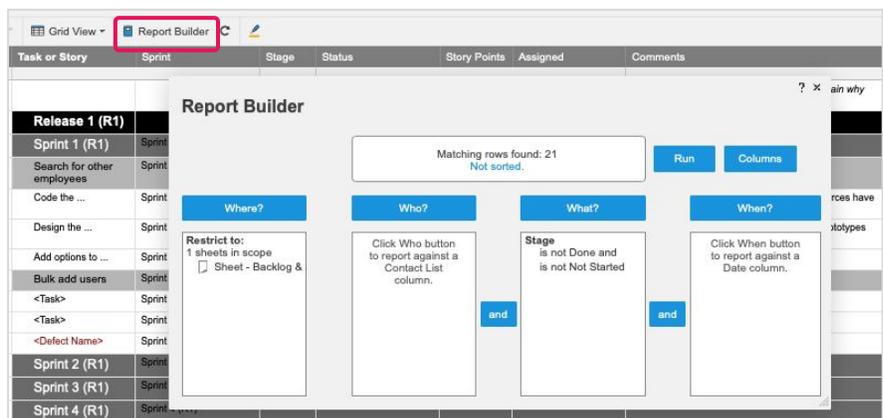
Manage the In Progress Report

The In Progress Tasks Report is a live display all of the tasks currently in progress. This report is surfaced in the Backlog and Sprint Dashboard.

- The report is already set up. If you want to make any changes to the criteria used for the report, open the report and click on *Report Builder* and set your criteria.

Learn more:

[Reports](#)



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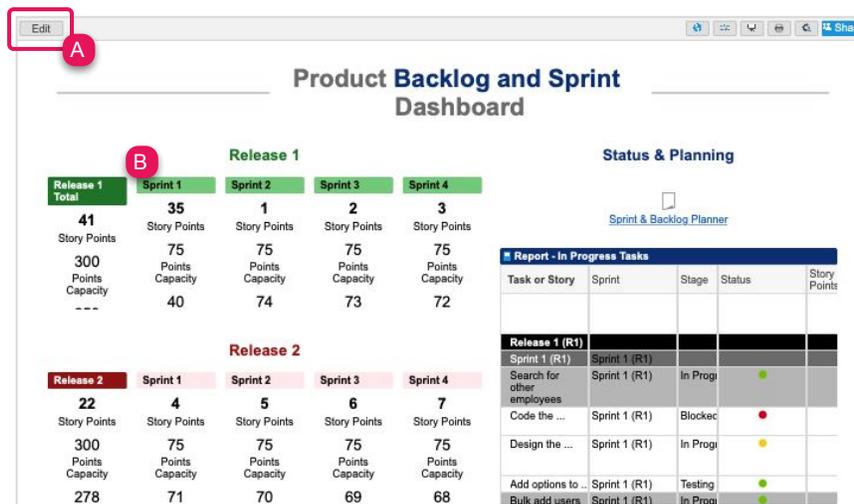
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Step 10:

Customize the Dashboard

Provide a central location for your team to get status updates on your product backlog and sprint planning. Easily customize the dashboard to include your product release metrics and add additional release sections.

- Click *Edit*, to start editing the dashboard.
- Hover over the Sprint 1 widget and a widget options menu will appear at the bottom corner.
- Click *Clone* (plus icon) to clone the widget.
- Repeat these steps to make a copy of other widgets.



Learn more:

[Make Changes to an Existing Dashboard](#), [Viewing and Sharing a Dashboard](#), [Widget Types for Smartsheet Dashboards](#), [Metric Widgets](#)

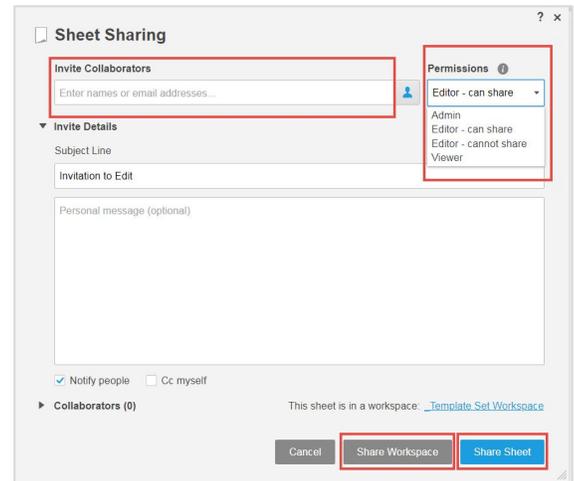
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Step 11:

Share Your Agile Backlog and Sprint Planning Template Set

Sharing is the best way to collaborate with others involved in your projects. You can share your entire workspace with members of your department, or share individual items within the workspace. For more information on sharing and permission levels, check out this [infographic](#).



Learn more:

[Workspace Sharing](#)