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LOGIN

1. Go to [https://www.expertdecisions.com/](https://www.expertdecisions.com/)
2. Create “**Free Trial Account**” for **Release Planner 2.0** using your email address. Provide the other information as well and hit “**Create My Account**”. 

![Release Planner 2.0](image-url)
3. Login to the email account you used for registration and click the link under “Confirm your account”. You will be prompted to give your name and password. Choose your desired name and password and click “Confirm my account and sign me in”.

Congratulations Test Account SJ0! You have been assigned to receive a product manager account. From the address provided below, you will be able to create ReleasePlanner 2.0 access that allows you to create new projects and optimized plans.

Click below to access the project using your existing account:

http://0.0.0.0:9028/user_email=rp2_test1 sailing45@gmail.com&user_token=eyJraWR3...
For signing in later use the following link: [http://rp2.releaseplanner.com/users/sign_in](http://rp2.releaseplanner.com/users/sign_in) and use your email id as the username and the password you used to register.

4. After logging in select the project you created (the name you gave when signing up)
ADD YOURSELF AS A STAKEHOLDER

5. At first you will need to add yourself as the stakeholder to be able to access all the functionalities. To do that go to Define -> Stakeholders and click Add Stakeholder on the top right corner (green button). Enter the same email address that you used for the above signing up procedure and click Add.

PLEASE NOTE:

1. The JIRA import/export function for importing features is under construction. Please do not attempt to import/export features, you are more than likely to face an error.
2. For best results please run RP 2.0 on Google Chrome.
DEFINE - INITIALIZATION

The objective is to create release plans. For that some initialization needs to be done. Below are the components that need to be defined before plans can be generated. The definitions can be done from the Define bar:

![Define Tab](image)

*Figure 1: Define Tab*
Features: Go to Define -> Features

Click Add Features on the top right. (You can define multiple features at a time). Click Add after you have entered the feature(s) information.

![Figure 2: Define Features](image)

Feature Dependencies: Go to Define -> Features Dependencies

Click Add feature Dependency on the top right. Add the desired dependency among the features and hit Save.

**Note:** When adding the first dependency, don’t choose Weak/Strict Precedence. Start off with Coupling type dependency. If for some reason the features don’t show up for any type of dependency in the dialog box, try refreshing and then attempt again. There might be some bugs here.

![Figure 3: Define Features Dependencies](image)
Planning Criteria: Go to Define -> Planning Criteria
Click Add Criterion on the top right and add the desired. For each criteria hit Add when done. At least 3-4 planning criteria should be created.

Resources: Go to Define -> Resources
Click Add Resource on the top right. Select resource type and give a name. Hit Add when done and repeat for all the resource types that needs to be created.

Releases: Go to Define -> Releases
Click Add Release on the top right corner. Give the release Name, Importance as well the Start and End dates. Hit Save when done and repeat for multiple releases. Multiple releases should be defined, since this is release planning after all.
After defining the releases, the resource capacities for each release must be defined especially for those resources whose units is Dollar. For defining capacities click on the Edit button in Green located under each of the release names (shown in the screenshot below)

![Edit Release](Figure 7: Edit Release)
Changes can be made for each of the resource types, for each particular release. Click Save when done.

Figure 8: Edit Release - 2

**Feature Effort Estimation: Go to Define -> Effort Estimation**

The Effort estimation for each feature must be entered into the system so that optimized plans can be generated which also satisfy capacity constraints of the releases. To enter effort estimations go to Define -> Effort Estimation. The estimated efforts for each are to be entered in the boxes next to each feature (denoted by the red circle). Each of the boxes for each feature will accept effort estimations for each of the resource types defined previously. After entering the effort estimations click Save near the top of the page (shown by the blue circle). The figure below describes the above.
Add Stakeholder: Go to Define -> Stakeholders.

At least another one stakeholder account is needed besides the one created before to be able to generate plans (otherwise you cannot proceed with plan generation). Add a second email address that you use to generate a stakeholder account as shown in the screenshot below. Click Add when done.
Updating Project Description: Go to Define -> Update Project Description

To make changes to the project description go to Define -> Update Project Description. The figure below shows the option in RP 2.0.

PRIORITIZE

Go to Prioritize (Top blue bar, to the right of define)

Set your perceived priorities as a first stakeholder for each of the features. You can also select No Opinion. You don’t need to save, page will automatically save your choices.
DO THE FOLLOWING IN A SEPARATE BROWSER (PREFERABLY Firefox or Internet Explorer)

After you have entered the secondary email address in the stakeholder section, login into the secondary email address account. You should receive a mail similar to the mail you received during the first stakeholder account signup. Similarly follow the steps, adding names and entering desired password. After you are done hit “Confirm my account and sign me in”. Select the project and you will see a screen similar to the one below:

![Stakeholder Voting/Prioritization](image)

*Figure 13: Stakeholder Voting/Prioritization*

Set your perceived priorities **as the second stakeholder** for each of the features. You can also select “No Opinion”. You don’t need to save, the page will automatically save your choices.
ANALYZE

All Stakeholder Prioritization Data: Go to Analyze -> Prioritization Summary

To view the voting progress for the project go to Analyze -> Prioritization Summary. You can also remind stakeholders to vote from this interface if any stakeholder has not completed voting. You can select users and then click Notify Selected Stakeholders to remind the stakeholders. This interface also allows users to see individual votes for each stakeholder for each of the features in the project. Click View Score button to view individual scores for each stakeholder. The figure below shows the mentioned interface with the appropriate figures highlighted.

![Prioritization Summary](image)

Figure 14: Prioritization Summary

Combined Feature Priority: Go to Analyze -> Combined Feature Priority

To view and analyze overall stakeholder prioritization for individual features users should go to Analyze -> Combined Feature Priority. Users can select different graphical representations from the dropdown boxes on the interface. The figure below shows the window in question.
Plan Generation: Go to Analyze -> Release Plan Management

Generate Plans: Go to Analyze -> Release Plan Management -> Click Generate a Set of Plans -> Give Plan name and click Generate.
You page should refresh with a set of generated plans, as shown in the figure above. Note: If the page doesn’t refresh or doesn’t show information please refresh manually.

Initially the pans are collapsed, click View/Hide to show plan details, as shown in the figure below.

![Figure 17: Release Plan Management (Collapsed View)](image)

After expanding plans you can view plan Data (View Data button), view the actual plan itself (View Plan button), view stakeholder excitement (View Excitement button) and also options for deleting and exporting plans. The figure below shows the expanded plans the buttons just described to view different plan data.

![Figure 18: Release Plan Management (Expanded View)](image)

Note: DO NOT CLICK EXPORT to JIRA (under construction).

Comparing Plans: Go to Analyze -> Compare Plans

To compare two plans go to Analyze -> Compare Plans, select the plans you want to compare from the two drop down boxes and hit Compare Structure and Resources or Show Plans. You page will reload with the plan details for the two plans selected.
Customization of Plans: Go to Analyze -> Customization of Plans

To analyze the effect of moving features between the different releases and the net impact compared to a baseline plan, go to Analyze -> Customization of Plans

Select the base plan from the dropdown box, click Show Plans, make changes to the custom Column Plan and hit Evaluate.

A dialog box will appear with the effects of the changes with respect to Feature, Resources and Dependencies.
Figure 21: Customization of Plans (Summary box)
Resource Usage Summary: Go to Analyze -> Resource Usage

To view the resource consumptions for each of the features go to Analyze -> Resource Usage Summary.

![Resource Usage Table]

*Figure 22: Resource Usage*

The Analyze tab also contains other visualization tools which summarizes many of the other aspects of RP 2.0, they are: Most Controversial Features and Excitement of Plans. These views are also shown in the Dashboard.

**DASHBOARD**

Your dashboard will now contain some graphs and charts summarizing your current plan, so click on the Dashboard button. More statistical data is available under the analyze tab (on the top blue ribbon).

Your dashboard should at least have the following components:
Figure 23: Dashboard