

EPISODE 6:

Know your States

Tips and Tricks for Rally,
Crowdsourced by the Community

1

Defect "State" field versus "Scheduled State" field

Question from Judy: In our organization, we use both "State" and "Scheduled State" for defects.

The values for State are **Submitted/Open/Fixed/System/Verify/Closed**.
The values for Scheduled State are **Backlog/Defined/In Progress/Completed/Accepted**

The issue we run into is that a defect should not enter the **Completed Scheduled State** until the **State = Closed**.

But, when the defect is still in **State = Open/Fixed/System Verify** and the last task on the defect is completed, the defect's Scheduled State switches to Completed.

Is there a way to tie these fields together such that the Scheduled State cannot be made Completed unless a defect's State is equal to Closed?

Possibly, any workflows that can be set?

Super Rally Answer: Hi! I just replied to your other post of similar nature regarding field dependency, which isn't currently available. It's not possible today to 'tie' these fields in a way that values will become available only in certain conditions.

The only thing I can think of is don't use both fields. You won't be using State altogether, instead, your team can create Flow States. Flow states can be created using the Team Board and allow you to map each Schedule State to different states (what we call flow states). You can design your flow states in a way that will have a state that will mean 'Closed' before the defect can be put into a Completed scheduled state.

This isn't a great solution (and I'm not sure it's even a solution), but you may want to consider that and see if that can help you. If you do implement that, then you will basically try to create a series of states that will adhere to a certain flow. You can also set your exit agreements as you wish.

BUT...

It will still not have the Defect State field conform, it'll just be an alternative. You'll need to train your team as part of the Exit Agreements to ensure the **State = Closed** before you allow moving the defect to **Schedule State = Completed**.

Here is an article that explains what flow states are. And here is the documentation page that explains it as well. Like I said, I'm not sure it can help you. You will need to consider if this can be a way to serialize your events and have your team conform.

I hope this helps. Please let us know.

2

Flow state and Schedule State

Question from Alexandra: We are creating a few dashboards around flow state and noticed some examples in our stance of Rally where the flow state and scheduled state didn't match on the story itself to what the team's mapping showed.

For example, the team created a flow state called **In Progress** and mapped it to the **In Progress** scheduled state. There are close to 100 stories for this one team that shows **Flow State = "In Progress"**, but **Schedule State = "Accepted" or "Deployed"**.

How does this mismatch happen?

Super Rally Answer: Hi! To answer your question, I'm not sure how it can happen, but I don't think it should happen. Here are some thoughts:

1. Could it be that you're looking at another's board where the flow state <> schedule state mapping isn't the same? Perhaps you're set to a project that's higher than the project for this team? Or that your scoping isn't well?

2. Can you look at the Revision History and see if you find both the event where the story entered the In-progress schedule state, but also if you can see another event where the story moved to **Accepted or Deployed**?

3. Do you have any flow states mapped to either **Accepted or Deployed**?

I suppose an important question is what is the actual **Schedule State**? The **Schedule State** is what matters to Rally. The flow state is internal to the team where it's set and I'm wondering if, while you're thinking that stories are **In-progress**, perhaps they are in **Accepted or Deployed**. That's why I asked about the Revision History.

Like I said, I don't know why this would happen. Hopefully, these questions can help us find out what's actually going on.

Let us know if this helped.

Follow-Up Question from Alexandra: To answer your questions:

1. No. All the same team.
2. The flow and scheduled states moved on different dates. I looked at the revision history for a few of them and there was no maintenance after 1/1/2020.

3. Yes. This team has two states mapped to **Accepted** and one to **Deployed**.

Follow up Super Rally Answer: Flowstate and schedule states are linked when accessed via editor. A change to flowstate will update the schedule state and vice versa. If more than one flowstate is mapped to a schedule state, then the first flowstate in the flow is chosen.

State changes via our editor should not cause any state sync issues. I am curious what support will find when they debug this issue in more detail.

Follow-Up Question from Alexandra: The examples that I found were stories and defects that had not been updated for a long, long time (some hadn't been touched since 2019). At the time, I guess, it was possible to have a mismatch.

Follow up Super Rally Answer: Yes. That would make sense. We had an issue around that a while back. Thanks for letting me know.

3

How can I find out 'when' I set up an email notification?

Question from Sandra: Is there a revision history where I can go and find out when I set up an email notification?

Super Rally Answer: Hi! Unfortunately, no. There isn't a revision history or another way to find out when a user set up an email notification rule.

If you'd like to pursue this further, you can post an enhancement request.

The best you can do is by using the 'Feedback' yellow button. You can find that button if you click on your avatar (top right) -> Personalized Navigation. You'll see that yellow button where you can fill in your request.

Please let us know if that helped.

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