AI Scrum Master - End User Guide

User Guide

Digicane Systems · Live Floor demo · Treat credentials as public evaluation logins.

Product: AI Scrum MasterAudience: Company admins, delivery leadership, project managers, and team membersVersion: 0.1.0Format: This document is also available as Microsoft Word: AI_Scrum_Master_End_User_Guide.docx

What AI Scrum Master is

AI Scrum Master is a multi-tenant delivery platform that replaces manual Scrum Master status chasing with an AI agent. It helps your company: Organize work by Accounts -> Projects -> Resources Collect daily status through time-bound email (or Microsoft Teams) links Track SDLC items: epics, features, stories, tasks, tests, defects, and RCA Alert leads on status changes, blockers, misses, and deadlines Produce weekly packs, billing, GTS reports, and management dashboards Staff sign in to the web dashboard. Delivery resources can submit daily status without a staff login by opening their personal magic link.

Sign in

Open the application URL (local default: http://localhost:3000, Docker Compose often http://localhost:3001). When the Live Floor bay URL is set in Admin, open Try live demo in your browser.

1. On Sign in, enter Email and Password.
2. Select Continue.
3. You land on Overview (Company matrix).

There is no public self-registration. Company admins create users under Users & roles. Password reset and SSO are not offered in this version.

Demo accounts (seed data)

Password for all: password123

Email	Role
admin@acme.local	Company Admin
ceo@acme.local	CEO
svp@acme.local	SVP
vp@acme.local	VP
avp@acme.local	AVP
pm@acme.local	Project Manager
alex@acme.local / sam@acme.local	Employee

Roles and feature access

Roles

Role (UI label) Typical user Primary use Company Admin Platform / ops admin Full access: settings, users, permissions, agent, Teams, all delivery data CEO Executive Dashboards, delivery data, users, permissions, agent, Teams, settings SVP Senior delivery leadership Like CEO minus editing Settings (by default) VP Account / delivery leadership Delivery menus and edit delivery data AVP Delivery lead Same default menus as VP Project Manager Project owner Delivery menus plus AI Agent jobs Employee Team member (staff login) Overview, Projects, Epic/Story/Task, Work breakdown, Daily status

Day-to-day project alert emails go to Project Manager, AVP, and VP. Resources who only submit status often never sign in; they use the email or Teams link instead.

Feature access

Menus and write actions are controlled per role. Open Feature access to see a checkbox matrix of Menus and Actions x roles. Select Save feature access after changes. Users should refresh or sign in again to see updated menus. Company Admin always has full access; those checkboxes stay enabled and locked. Actions (not sidebar items): Action What it allows Edit delivery data Create/update accounts, projects, resources, leaves, SDLC Manage users Create users and change roles Run agent jobs Open/close status window, deadline sweep, weekly packs Edit settings Change company collection settings Manage MS Teams Enable bot, link people, connect channels

Default menus by role are listed in the Quick reference at the end of this guide. Your company can customize them.

First-time setup

Complete this once per company (or when onboarding a new account). Sign in as Company Admin (or CEO).

- Settings - set timezone, daily status start time, window length, weekly report time, deadline warn days. Select Save settings.
- Accounts - add each client/account (name, GTS code, technology, domain, PMs). Select Add account.
- Projects - create projects under an account; set phase, dates, billable. Select Add project.
- Resources - add people (Employee ID, Name, Email). Email is used for daily status links.

On Projects, use Assign / update to map resources (capacity %, billable, hourly rate). Open a project -> add backlog items and tasks (or use Epic / Story / Task -> backlog manager). Optionally configure MS Teams and schedule cron for automatic agent jobs (see Deployment / Teams docs).

Navigation map

Sidebar items appear only if your role (and Feature access) allows them. Brand label: AI Scrum Master / Delivery HQ. Use Sign out at the bottom of the sidebar. Menu Path Purpose Overview /dashboard Company matrix, RAG, KPIs Accounts /dashboard/accounts Client accounts Projects /dashboard/projects Projects and assignments Epic / Story / Task /dashboard/backlog Pick a project for backlog management Resources /dashboard/resources People master Users & roles /dashboard/users Staff users and roles Feature access /dashboard/permissions Menus/actions per role Billing /dashboard/billing Monthly billing matrix Work breakdown /dashboard/workboard Planned vs actual by hierarchy Quality / RCA /dashboard/quality Defect RCA and review sheets Daily status /dashboard/status Submission compliance Leaves /dashboard/leaves Leaves and extra working days Weekly reports /dashboard/reports Generated weekly packs GTS Report /dashboard/gts-report Month-wise GTS sheet AI agent /dashboard/agent Run status chase and jobs MS Teams /dashboard/teams Bot people, channels, activity Settings /dashboard/settings Company window configuration

Public (no login): daily status form at /status/{token}.

Screen guides

Overview (Company matrix)

KPI cards (often click-through): Accounts, Projects, Resources, Overdue tasks, Open defects, Pending status. Project RAG matrix: Account, Project, Phase, Resources, Overdue, Defects, Test pass, Density, RAG. Recent weekly reports with View all. RAG (simplified):

- Red - any overdue open task (client deadline)
- Amber - open critical defect
- Green - otherwise

Accounts

Add account: Account name, Code (GTS project name), Technology, Domain, Project managers -> Add account. Per row: edit fields -> Save, or Deactivate (soft inactive). Requires Edit delivery data (or Company Admin).

Projects

Add project: Account, Project name, Phase (Requirements -> Design -> Dev -> Test -> UAT -> Closed), Start/End, Billable -> Add project. Assign / update: Project, Resource, Capacity %, Billable (this project), Billing rate (per hour) -> Assign / update. Table: open project, Manage Epic / Story / Task, remove assignment, Save / Deactivate. Hourly rate is used for billing when the assignment is billable.

Project detail

Open a project from Projects. Links: Manage Epic / Story / Task, All projects backlog, Open backlog manager. Save billing dates (start, end, billable). Add task / subtask -> Save task (kind, parent, phase, owner, story link, estimate days, dates, client deadline, resource deadline, progress/status). Add epic / feature / story -> Save backlog item. Add test case (status: not_run / pass / fail / blocked). Add defect (source: internal / client_informed; severity low -> critical). On defects without RCA: Capture RCA / review. Shows defect density and lists of tasks, backlog, tests, and defects.

Epic / Story / Task (backlog hub and manager)

Hub (/dashboard/backlog): project cards with Manage Epic / Story / Task and Project details. Backlog manager (/dashboard/projects/{id}/backlog): Add/edit/delete epics, features, stories and tasks/subtasks. Assign resources, estimates, deadlines, status, progress %. Buttons include Update, Delete, Add backlog item, Add Task / Subtask, link to Work breakdown board. Project Managers / delivery editors: full edit. Employees: update their own assigned tasks. Others may be view-only.

Resources

Add resource: Employee ID, Name, Email -> Add resource. Row: Save / Deactivate. Shows multi-project assignments. Billing rates are set on project assignment, not on the resource master.

Users & roles

Explains roles briefly on the page. Add user: Name, Email, Password (minimum 6 characters), Role -> Add user. Per user: change role -> Save. Requires Manage users.

Feature access

Checkbox matrix of menus and actions by role. Save feature access. Company Admin column cannot remove full access.

Billing

Choose Year / Month -> View month. Optional Total working days override + note -> Save override. Sections: Grand total, Account totals, Project-wise, Resource-wise, Detail (resource x project). Formula:

billable_days = working_days - leaves + extra working days billing = hourly_rate x 8 x billable_days (hours/day = 8)

Work breakdown

Filters: View (Project-wise / Resource-wise), Period (Day / Week / Month / Quarter / Year), Project, Resource -> Apply. Totals: estimate, planned, actual status hours, variance. Hierarchy: Epic -> Feature -> Story -> Task / Subtask (1 estimate day = 8 hours). Actual hours come from daily status submissions.

Quality / RCA

Filter defects by source (All / Internal / Client informed) -> Filter. Per defect: Save RCA (problem, root cause, contributing factors, impact, containment, corrective/preventive actions, owner, dates, status, review). Save review sheet (reviewer, type, scope, checklist items, findings, actions, residual risk, sign-off). Link Open project -> to the owning project. Defects are created on the project page.

Daily status (dashboard)

Last 7 windows with counts: Submitted / Pending / Expired / Leave. Per-resource table and recent submissions feed. Windows are opened from AI agent (or cron), not from this page.

Leaves & extra working days

Log leave: Resource, optional Project (blank = all), Type (internal / client-informed), Start, End, Reason -> Log leave. Add extra day: Resource, Project, Date, Note -> Add extra day. Leave skips daily status chase for covered dates and reduces billable days. Extra days increase billable days.

Weekly reports

Cards for resource-wise, project-wise, and company digests: period, narrative, metrics, emailed-to. Generate packs from AI agent -> Generate weekly packs.

GTS Report

Select Account, Year, Month -> Open month (month tabs available). Generate GTS month or Refresh from system data. Save header: Project Name, PMs, Technology, Domain, Utilization %, Availability %, remarks. Edit or Delete lines; add rows (Sub Project, linked project, Feature, UAT Defects, Effort hrs, Remarks). DDD-style density uses defects / effort hours where applicable. Refresh replaces generated lines from system data.

AI agent

Four panels, each with Run now: Job Effect Open daily status window Create today's window and send/ chase links Close expired windows Expire pending requests and escalate misses Deadline sweep Approaching / overdue deadline alerts Generate weekly packs Resource, project, and company digests

Automation: schedule POST /api/cron with the company cron secret (see Deployment docs). Without SMTP configured, emails and magic links appear in the server console (look for Links:).

MS Teams

Optional. Email status links still work if Teams is off. Environment status shows whether bot credentials / AI parse are configured. Company settings: Enable agent, Chase on window open, Azure AD tenant id, Reminder minutes before close -> Save. Run relay to process pending Teams notifications. Linked people: map Teams identity to resource -> Save, Test, Mute/Unmute, Remove, Install for {name}. Channels: project scope, Active, notify types (status submitted, blockers, missed, deadlines, weekly packs) -> Save, Send test, Remove. Recent bot activity and sends appear on the page. Common bot commands (after linking): Command Who Effect help / hi Everyone Help card status / my status Everyone Open status form Free-text day summary Everyone Confirm card (AI parse if enabled) my tasks Everyone List tasks update <task> <n>% Everyone Update progress blocker <text> Everyone Report blocker leave YYYY-MM-DD ... Everyone Request leave mute / unmute Everyone Pause/resume bot DMs standup Leads Standup summary missing Leads Who has not submitted report project <name> Leads Project report

Leads for Teams DMs align with project alert roles (PM, AVP, VP) when linked and not muted. Bot setup details: docs/TEAMS_INTEGRATION.md.

Settings

Setting Meaning Typical default Timezone Company local timezone label Asia/Kolkata Daily status start When the window opens (HH:mm) 17:00 Window length (hours) Link validity from start 2 Weekly report time Preferred weekly pack time 09:00 Deadline warn days Days before deadline to alert (comma-separated) 3,1

Select Save settings. Requires Edit settings.

Magic-link daily status form

URL: /status/{token} (from email or Teams). No staff login required. Fields: Productive hours Non-productive hours Primary project today Overall progress % Per-task progress % What did you work on? Blockers (optional) Buttons: Submit status or Update status. States: Invalid link · On leave · Link expired · Form open · Window closed (read-only last submission). You may update while the window is open. After expiry the form locks. Task progress of 100% marks the task done when submissions apply progress.

Core workflows

Daily status collection

- Open window - AI Agent -> Open daily status window (or cron open-status-window).

System creates a status window (startsAt -> expiresAt = start + window length). Each active resource gets a unique token/link. Resources on approved leave are skipped_leave (no chase). Resource opens the link and submits before expiry. Request becomes submitted. Project Manager / AVP / VP receive status-change email; blockers trigger a blocker alert. Close expired windows (or cron) marks remaining pending as expired and emails miss escalation to PM / AVP / VP. Monitor compliance on Daily status.

Deadline alerts

Run Deadline sweep (or cron deadline-sweep). Condition Recipients Due in configured warn days (e.g. 3 or 1) - client or resource deadline Task owner (if assigned) + PM, AVP, VP Overdue (not done) Task owner + PM, AVP, VP

Alerts are deduplicated so the same threshold is not emailed repeatedly.

Weekly packs

Run Generate weekly packs (or cron weekly-reports). Pack Typical recipients Per resource That resource + Project Managers Per project PM, AVP, VP, SVP, CEO, Company Admin Company digest CEO, SVP, VP, Company Admin

View history under Weekly reports. Defect density (MVP): defects ÷ closed requirements (or raw defect count if none closed).

Operating rhythm

When Action Owner Daily (configured hour) Open status window Cron / AI Agent Daily (start + window length) Close window / escalate misses Cron / AI Agent Daily morning Deadline sweep Cron / AI Agent Continuous Update tasks, defects, RCA, leaves PM / AVP / VP Weekly (e.g. Monday) Generate weekly packs Cron / AI Agent Weekly review Walk Overview RAG + Red projects CEO / SVP / VP Monthly Review Billing and GTS Report Finance / PMs / leadership

Troubleshooting

Symptom What to check No status emails SMTP configuration; otherwise check server console for Links: Link says expired Window closed; wait for next day's open (typically one window per day) Resource not chased Inactive resource, or leave covering today PM not notified User must be Project Manager, AVP, or VP with a valid email; check SMTP/console Menu missing Feature access for your role; sign out and back in Cannot edit projects Need Edit delivery data Cannot run agent Need Run agent jobs Duplicate deadline mail blocked

- Expected - notifications are deduplicated

Cannot sign in Correct seed/user password; admin-created account exists Teams not responding Bot credentials, linking, mute state; see Teams integration doc Billing looks wrong Assignment rates, leaves, extras, working-days override

Out of scope in this version

Treat these as not available unless later released: Excel / CSV status upload Jira / Azure DevOps sync Free-form email reply parsing (email delivers the link only) Slack / SMS notifications Native mobile apps Public self-signup or password reset UI

Quick reference

Agent jobs

Job name UI label Effect open-status-window Open daily status window Create window + chase links close-status-window Close expired windows Expire pending + escalate deadline-sweep Deadline sweep Approaching / overdue emails weekly-reports Generate weekly packs Resource + project + company packs run-all-daily (cron only) Open + close + deadline in one call

Default menus by role

Role Default access (high level) Company Admin Everything CEO Almost all menus + users, permissions, agent, teams, settings + manage actions SVP Like CEO without edit settings (has users, permissions, agent, teams) VP / AVP Delivery menus + edit delivery (no agent/users/settings by default) Project Manager Delivery menus + agent + run agent Employee Overview, Projects, Epic/Story/Task, Work breakdown, Daily status

Related documentation

Document Use docs/TEAMS_INTEGRATION.md Teams bot installation and configuration docs/DEPLOYMENT.md Cron, env vars, production deploy docs/DOCKER_LOCAL.md Local Docker Desktop stack docs/FRD.md Formal functional requirements docs/ARCHITECTURE.md System design (technical)

End of End User Guide