SPERT® Story Map

Quick Reference Guide

Browser-based agile release planning with story map structure, sprint tracking, and insights · storymap.spertsuite.com

WHAT IS SPERT® STORY MAP?

SPERT® Story Map is a browser-based agile release planning tool that replaces spreadsheet-driven story mapping workflows. It organizes work in a three-level hierarchy (**Theme** → **Backbone** → **Rib Item**) and connects your product backlog to releases, sprints, and progress tracking — all in one place. Use it to plan, size, assign, and track delivery of your product backlog across releases.

Theme	The highest-level grouping — a major capability area or product theme. Each theme can optionally be assigned one of 8 colors (blue, teal, violet, rose, amber, emerald, indigo, orange) for visual differentiation on the story map. Each theme header has a **+ Backbone** button to add a backbone directly to that theme. A theme can also carry a description of up to 2,000 characters, written in its panel on the Map.
Backbone item	A feature or user activity under a theme. Backbone items span releases and contain rib items. Names wrap up to two lines on the Map for readability. A backbone can carry a description too.
Rib item	The finest-grained work unit. Has a t-shirt size (XS → XXXL), a category (Core / Non-core), release allocations, sprint-by-sprint progress tracking, an optional description, and an optional free-text notes field (up to 2,000 characters).
Release	A named delivery milestone with an optional target date. Rib items are assigned to releases with a percentage allocation (single release = 100%, or split across multiple releases).
Sprint	A time-boxed iteration with a name and finish date. Used to record incremental progress on each rib item's release allocation.

■ **Tip:** Create your Themes, Backbones, and Rib Items in the Structure tab first — then assign them to releases in the Releases tab and track sprint progress in the Progress tab. You can also build the full hierarchy directly on the Map tab, or use **Connect AI** to let a compatible AI assistant build the map, create releases, size rib items, move work between releases, and write descriptions and notes for you in bulk.

STEP-BY-STEP WORKFLOW

#	Tab / Page	What to do
1	Products	Create a product. A product can be an application, a service, an internal capability or any other initiative. Click **New Product**, give it a name and optional description, or click **Load Sample** to explore one. Products are listed as tiles on the Products page; each tile shows its items, points, and percent complete, its releases and sprints, and a warning line when items are unsized or progress is not counting. Click anywhere on a tile to open its Structure tab. **Delete** sits beside the name; pointing at a tile shows **Share** (cloud mode, owners only), **Export** (JSON), **Edit** (name and description), and **Clone**. Drag a tile by its drag handle to reorder. Use **Export All** to download all products as a single JSON backup.
2	Structure	Build your hierarchy. Add Themes, then Backbone items under each theme (use **+ Backbone** on each theme header), then Rib items. Assign a t-shirt size and Core/Non-core category. Drag rib items to reorder them; use the up and down arrows for themes and backbones.

#	Tab / Page	What to do
3	Settings	Configure Releases (delivery milestones with optional target dates) and Sprints (iterations with finish dates and cadence). Set the T-Shirt Size Mapping (points per t-shirt size) and the product's name and description.
4	Releases	Assign rib items to releases via the Kanban board. Drag cards across columns. Click a card to divide its effort across multiple releases with percentage splits. Change Core/Non-core directly in the allocation dialog.
5	Progress	After each sprint, record percent-complete for each rib item per release. Select the sprint, keep the grouping on Release, enter progress values, and optionally add assessment notes. View burn-up charts and delta tracking.
6	Insights	Review analytics: total and per-release points, core/non-core breakdown, sizing distribution, burn-up chart over time, and the **Needs Attention** panel (progress not counting, and unsized, unassigned, or incompletely allocated ribs).

Note: Undo works from the Map and Sizing tabs: press Ctrl+Z (Cmd+Z on a Mac). It reaches edits made on any tab, but does not persist across page refreshes. Export a JSON backup before making major structural changes.

VIEWS & KEY FEATURES

Structure tab	Grid editor for the Theme → Backbone → Rib hierarchy. Inline editing, drag-to-reorder for rib items, up and down arrows for themes and backbones, t-shirt size picker (a rib with recorded progress shows its size locked instead), Core/Non-core toggle per rib item. Collapse a theme or backbone to hide what is under it. Stats (points, % complete) per theme and backbone.
Map tab	The story map canvas: backbone columns across, release lanes down. Release labels are mirrored on the left and right edges — double-click either to rename, single-click to open the release detail panel, and use the small toggle beside a label to collapse that lane (collapsed lanes show name and card count). A **Collapse releases / Expand all** button at the top-right controls every lane at once, and an **Unassigned** lane sits at the bottom for ribs not yet allocated. An Unknown release lane appears above it when a rib is allocated to a release the product does not have; drag its cards to a release to fix them. Hover any cell — including empty cells inside release lanes — to reveal a contextual **+ Rib** button. Drag rib cards in two dimensions (across release lanes and backbone columns at once); backbone and theme headers drag horizontally; the drag handle beside a release label reorders lanes vertically.
Map: themes and backbones	Click a theme or backbone name to open its panel beside the map: its rib items, points, % done, and unsized count, and a description of up to 2,000 characters. The map narrows to make room, so you can keep working; click another name to switch, and press Escape or click × to close. Click the name in the panel, or double-click it on the map, to rename it. A name with a description shows a small icon, and hovering the name shows the start of the description.

Map: rib cards	**Click a card to open its slide-out detail panel; click-and-hold anywhere on the card to drag it** — there is no separate grip handle. Each card is a single vertical stack: the rib name owns the card's **full width** and wraps up to two lines, with a compact footer row beneath it showing t-shirt size, points, allocation percentage, and the Core/Non-Core label. **Double-click the name** to rename it in place. Hovering a card (or reaching it by keyboard) reveals a **three-dot actions menu** at the far right of that footer row, offering **Color**, **Clone rib item**, and **Delete**. Cloning duplicates size, category, description, notes, card color, and allocations but starts with fresh progress; smart naming runs 'Task' → 'Task (1)' → 'Task (2)'. The color picker offers 7 card flag colors (red, orange, yellow, green, blue, purple, gray) or clear, and a collapsible **color legend** floats in the bottom-right of both the Map and Sizing tabs once any card is colored — click a label to edit its meaning in place. The detail panel itself carries editable name, category, description, size (shown locked once the rib has recorded progress), notes, and the full allocation breakdown.
Sizing tab	**Click any card to open its edit dialog; click-and-hold to drag** it into a t-shirt size column (XS–XXXL). Unsized cards live in the top zone, organized in an Excel-style grid with A/B/C column letters and 1/2/3 row numbers for easy reference. Sized columns expand to fill the available canvas width. Rib names show up to two lines. Each card exposes a **three-dot options menu** with **Edit** (name, description, category, size, card color, notes — prefilled), **Color**, **Split** (creates a sibling rib in the same backbone with an (N) suffix), and **Delete** (confirmation dialog). A card locks when a release it is on holds progress above 0% in any sprint, even if the latest sprint reads 0%. Progress left on a release the rib has moved off does not lock it. Hover a locked card's badge to see which sprint locks it. Drag-to-resize is disabled and the size field in Edit is read-only, but the card is still **clickable to edit** name, description, category, and notes. Color, Split, and Delete remain available.
Sizing: filters	A collapsible filter panel sits below the zoom controls: **theme chips** (multi-select), **release chips** (multi-select — hides unallocated ribs when active), a **Hide completed** toggle (hides locked cards), and **Clear all filters**. Filter state **persists across tab navigation** per product (session storage: it survives a page refresh and clears when you close the browser tab), and the filter badge count reflects all active filters. A **+ Rib** button in the overlay opens a create modal with cascading theme → backbone → name selectors; smart defaults pre-fill when the active filter narrows to one choice.
Releases tab	Kanban board — one column per release, plus Unassigned. Drag rib cards across columns to assign. Click a card to distribute its effort across multiple releases by percentage (should total 100%; the dialog warns but still saves). Toggle Core/Non-core in the dialog. Memos per allocation. Filter the board by All, Core, or Non-core.
Rib item notes	Each rib item has a free-text notes field (up to 2,000 characters) accessible from the slide-out detail panel on the Map tab. Use it for requirements, acceptance criteria, reference links, or any per-item context. A character counter turns amber at 1,800 and red at 2,000. Notes save automatically on blur and appear in the XLSX export.
Progress tab	Sprint-by-sprint progress entry. Select a sprint and enter % complete per rib/release row. Group by release, backbone, or theme; only Release rows can be edited. View burn-up chart and delta from prior sprint. Expand a row to add assessment notes (auto-timestamped). A footer shows what the groups leave out: **Unallocated** and **Over-allocated** under Release, **Unassigned ribs** under Backbone or Theme. A rib allocated to a release that no longer exists appears under an **Unknown release** group. Progress regression is allowed.
Insights tab	Analytics dashboard: total/core/non-core points, rib count, % complete, per-release breakdown (core vs. non-core stacked bars and a table), sizing distribution, burn-up chart over time, and the **Needs Attention** panel. Below the releases, the table adds **Unknown release** (a release that no longer exists), **Unallocated** (work on no release), and **Over-allocated** (allocation above 100%, shown as a negative) when they apply, then a **Total**, so the rows add up to the product.

Settings tab	Manage releases (target dates, drag-to-reorder), sprints (finish dates, cadence), T-Shirt Size Mapping (points per t-shirt label), product name and description. Data section: export/import JSON, **Export as Excel** (.xlsx), **Export for SPERT Forecaster**, **Send to SPERT Forecaster**, and Download Template. Sharing section (cloud mode only).
Connect AI	A **Connect AI** button in the product header pairs a compatible AI assistant with your open product so it can build and edit your story map in real time — see the **Connect AI** section below.

RELEASE ALLOCATION & PROGRESS TRACKING	
Single allocation	Drag a rib card from Unassigned into a release column to assign 100% of its effort to that release. Dragging between releases keeps the card's percentage.
Split allocation	Click a rib card to open its allocation dialog. Distribute the rib's effort across multiple releases by percentage. The total should be 100%: the dialog shows anything else in amber or red, but still saves it. Each allocation can carry an optional memo. Toggle **Core/Non-core** directly in the dialog.
Rib item notes	Each rib item has a free-text notes field (up to 2,000 characters) for requirements, acceptance criteria, or reference content. Open a rib card on the Map to access Notes in the slide-out detail panel. Saves automatically on blur.
Progress entry	In the Progress tab, enter % complete for each rib item per release, per sprint. A row accepts up to its allocation; a higher figure is not saved. A typed 0 is kept as a record. Clearing the cell removes the entry; a note on it stays.
How progress counts	A rib's progress counts on the releases it is allocated to now, and only up to each allocation. A sprint's figure is the latest value at or before that sprint. Every figure in the app, the Excel export, and the Forecaster export follows this one rule.
Moving a rib	Moving a rib to another release keeps its progress and notes. They follow the rib on a drag (Map or Releases tab), in the allocation dialog, and in an AI move, and one undo restores both. If the rib has nothing recorded (a typed 0 counts as recorded) and the target release holds older progress, that older progress counts again; the dialog says so before you save. Dragging a rib to Unassigned, or removing a release in the dialog, deletes nothing: the progress stays under that release, stops counting, and returns if the rib does. Dragging one card of a split rib to Unassigned clears all of its releases.
Clear progress	Expand a rib's row on the Progress tab and choose **Clear progress** to remove its progress on every release and sprint, including records that are not counting. Notes stay and the rib unlocks. A confirm comes first; to undo, open the Map or Sizing tab.
Deleting a release or sprint	Deleting a release or a sprint also deletes the progress and notes recorded under it, and the confirm says so. Settings asks first when a release has rib items allocated or holds records, and when a sprint holds records; one that holds nothing goes without a prompt. On the Map and the Releases tab, a release with rib items allocated cannot be deleted until they are moved out.
Delta tracking	The Progress tab shows the change in % complete since the prior sprint — helping the team see velocity and identify stalled items at a glance.
Burn-up chart	Cumulative completed points vs. total scope over sprints. Every sprint is calculated from the current plan, so adding, sizing, or re-allocating rib items changes past sprints' figures too.
Assessment notes	Each progress entry supports an optional comment with auto-timestamp. Full history shown newest-first in an expandable panel.

Note: Progress regression is allowed — you can reduce a rib item's % complete to keep data honest. A rib item is size-locked on every tab when a release it is on holds progress above 0% in any sprint (drag-to-resize on Sizing is disabled, and the size shows as locked in the Sizing Edit dialog, on the Structure tab, and in the Map's detail panel, to preserve points integrity), but its name, description, category, and notes can still be edited. Resize before recording sprint progress. After that, use **Clear progress** on the rib's expanded row on the Progress tab, which deletes its records, or drag it to Unassigned, change the size and drag it back, which keeps them.

DATA & STORAGE	
Local storage	Default. Data is stored in your browser only — never sent to any server. Safe for corporate data. An amber warning banner reminds you to export at the end of every session. **Got it** hides it until you reload the page; to turn it off for good, use the Cloud Storage modal → Notifications. Clearing browser site data permanently deletes all products.
Cloud storage	Optional. Click the split-pill auth chip in the header to open the **Cloud Storage** modal — from any auth state (signed out, signed in, or signed in but on local mode). Sign in with Google or Microsoft; **Microsoft sign-in requires a work or school account**, so use Google for a personal account. If you sign in but prefer to stay on local storage, a **Keep using local storage** button closes the modal without switching modes. Once in cloud mode, data syncs via Firebase across all your devices and enables product sharing with team members (owner / editor / viewer roles). **Sign out** is on the modal's identity card; the chip updates in place with no page reload. Signing out also ends any Connect AI session.
Export / Import (JSON)	Settings tab → Data: download a single product as a JSON backup. **Import** on the Products page supports multi-product files with per-product resolution (skip, replace, or import-as-copy) — preview all products before anything changes. **Export All** on the Products page downloads every product as a single bundled JSON file in one click.
Export as Excel (XLSX)	Settings tab → Data → Export as Excel: generates a three-sheet .xlsx workbook that opens on the first. **Themes & Backbones** sheet: each theme on a shaded row with its description, then its backbones and their descriptions. **Release Summary** sheet: one row per release with totals, % Complete, core/non-core breakdown, and target date, then the same Unknown release, Unallocated, Over-allocated, and Total rows as the Insights table. **Rib Items** sheet: one row per rib with Theme, Backbone, Rib Item, Category, Size, Points, % Complete, Release(s), Description, and Notes — color-coded theme header rows; a size no longer in the size list reads, for example, "XL" (not in size list). Each sheet's header row is frozen.
Export for SPERT Forecaster	Settings tab → Data: download the product as a SPERT® Forecaster import file, transforming releases into milestones that carry the work remaining in each release, with sprint velocity data. This is the route to use when moving a product to another machine, keeping a copy, or handing it to somebody else. Every sprint needs a finish date: a product with an undated sprint is refused, and the message names it. Releases with no points estimated are left out on purpose: a zero over there marks a milestone as finished.
Send to SPERT Forecaster	Settings tab → Data: opens SPERT® Forecaster in a new tab and hands the product straight over — no download, no re-upload. It is a one-time handover between two tabs in the same browser: nothing stays connected, nothing runs in the background, and closing either tab ends it. The content is identical to the file export and runs the same compatibility check first. The button reports back what happened — imported, held for review because it conflicts with a project already there, refused with a reason, or no answer at all. Allow pop-ups if the new tab is blocked.
Undo / Redo	On the Map and Sizing tabs: Ctrl+Z to undo, Ctrl+Y to redo (Cmd+Z and Cmd+Y on a Mac). Up to 30 undo steps, in-memory only. Undo history resets on page refresh.

Dark mode	Click the sun, moon, or screen icon in the header (on the Products page or in a product) to cycle Light / Dark / System mode. System follows your OS preference. Choice is saved to localStorage.

■ **Tip:** Export a backup before sharing a product file with colleagues or before major structural changes. The Export Attribution fields (in the Cloud Storage modal) embed your name and identifier in exported files for team workflow traceability.

SIZE MAPPING & T-SHIRT SIZING

Rib items are sized using t-shirt labels that map to story points. The default mapping is configurable per product in Settings → T-Shirt Size Mapping. Renaming a size there saves when you leave the field or press Enter, and moves every item on that size to the new label. Removing a size that items use asks first and leaves those items unsized; it is refused if that would change points already recorded for past sprints. An item on a size no longer in the list counts 0 points and shows as unsized; the size control, Needs Attention, and the Excel export name the missing label, and **Add back** in Settings returns it to the list at 0 points, ready for its points. Points drive all calculations in the Insights and Progress tabs.

Size	Default Points	Notes
XS	5	Smallest unit — quick tasks, minor enhancements.
S	10	Small, well-understood feature with minimal unknowns.
M	20	Typical mid-size feature requiring design and test effort.
L	40	Large feature with meaningful complexity or dependencies.
XL	100	Very large feature; consider breaking into smaller rib items.
XXL	200	Epic-scale work — splitting is strongly recommended.
XXXL	300	Highest size tier. Use as a placeholder until fully decomposed.

Note: A rib item with progress above 0% on a release it is on, in any sprint, is size-locked on every tab: drag-to-resize on Sizing is disabled, and the size shows as locked in the Sizing Edit dialog, on the Structure tab, and in the Map's detail panel, protecting historical points-vs-progress math. The card is still clickable to edit name, description, category, and notes. Resize before recording sprint progress. After that, use **Clear progress** on the rib's expanded row on the Progress tab, which deletes its records, or drag it to Unassigned, change the size and drag it back, which keeps them.

CONNECT AI

Connect AI pairs a compatible AI assistant with the product you have open so it can build and edit your story map while you watch. It works over MCP (Model Context Protocol): the SPERT MCP server at mcp.spertsuite.com is what the assistant calls, and your AI client must already be configured to reach it. The server exposes **22 Story Map tools** — eight of them bulk tools — plus two shared tools used to pair the session. Full client-by-client setup lives in the separate *Connect AI Guide*.

Starting a session	Click **Connect AI** in the product header. Choose permissions in the consent modal, then copy the pairing code (**Copy Code**) or the ready-to-paste instructions (**Copy Prompt**) and send it to your assistant. The pairing code expires in 15 minutes; once paired, the session itself lasts up to 7 days. Click **Disconnect** when you are done; signing out also ends the session. Do not switch products mid-session: stay on the product while the AI works.
Write Mode (required)	Lets the assistant create and edit themes, backbones, rib items, and releases; set sizes and release allocations; and write descriptions, categories, and notes.

Read Mode (optional)	Lets the assistant see your current structure, descriptions, allocations, sizes, and notes before it changes anything. Turn it on before asking the AI to edit an existing map, allocate or unassign work, move ribs, size ribs, or update text in bulk — without it the assistant is working blind and may duplicate what is already there.
Bulk tools	Eight bulk tools collapse many individual calls into one, which matters on large maps and with assistants that pause between calls: bulk create releases, bulk allocate, bulk size, bulk unassign, bulk move, bulk update rib content, bulk append notes, and bulk update backbone descriptions. Most handle up to 500 rib items per call; note-appends and backbone descriptions cap at 100 per call, and releases at 50.
Moving work	The assistant can move a rib to a different backbone and reassign its release in one step. The two changes apply independently, and the target backbone may sit under any theme. A locked (in-progress) rib can still change backbones, but its release assignment is protected. A rib already split across releases keeps that split — unassign it first to replace it. Moving a rib back to a release can restore progress recorded there, as a drag does, and the rib then locks.
Notes: append vs. replace	Two different operations write notes, and the difference matters. **Append** adds your text after a blank line and always preserves what is already there. **Update** overwrites the field wholesale. Ask for an append unless you actually want the existing note replaced or cleared. Appends are not repeatable — running the same one twice adds the text twice — and an append that would push a rib past 2,000 characters is skipped for that rib rather than truncated mid-sentence.
Build limits	One whole-map build can carry up to 5 themes, 10 backbones per theme, and 10 rib items per backbone; the assistant adds anything larger with its individual tools. These limits apply only to that AI build; the app itself has no structural size limits.

Note: The assistant never deletes themes, backbones, rib items, or releases, and never edits progress data — only you can. Locked rib items cannot be resized by the AI (use **Clear progress** first), though their description, category, and notes can still be updated. Undo works on AI-generated content from the Map or Sizing tab, but undo history resets on page refresh — export a JSON backup once you are happy with the result.

TIPS, SHORTCUTS & ATTENTION ITEMS

Inline rename	In the Structure tab, click a theme, backbone, or rib item name to rename it in place. On the Map, double-click a theme, backbone, rib card name, or release label (a single click on a theme or backbone name, a card, or a release label opens its panel). On the Releases tab, double-click a release name. Press Enter to confirm or Escape to cancel.
Card actions menu	On both the Map and Sizing tabs, each rib card carries a **three-dot actions menu**. On the Map it appears on hover or keyboard focus; on Sizing it is always showing. Map cards offer Color, Clone rib item, and Delete; Sizing cards offer Edit, Color, Split, and Delete. Delete from this menu asks for confirmation. On the Map, Shift-click cards to select several, then drag one to move them together, or press Delete to remove them with no confirmation; undo restores them.
Map pan & zoom	On the Map and Sizing tabs, click and drag any empty area to pan — left-click only (right-click is reserved for the browser context menu and does not trigger panning). Mouse wheel or pinch gesture to zoom. Text cannot be accidentally highlighted while panning. A 'Drag to pan · Scroll to zoom' hint appears in the bottom-left corner for new users and auto-dismisses after the first successful pan.

Drag to reorder	Structure tab: drag rib items, and use the up and down arrows for themes and backbones. Map and Sizing tabs: click-and-hold anywhere on a card to drag it (rib cards move 2D on the Map — across release lanes and backbone columns simultaneously; backbone and theme headers move horizontally). A drag handle beside each release label lets you reorder lanes vertically — a blue insertion line shows the drop position. Releases tab: drag columns to reorder releases.
+ Rib shortcuts	In the Structure tab, **+ Rib** adds a row named New Rib Item; click the name to rename it. On the Map, hover any cell — including empty cells in release lanes — to reveal a contextual + Rib button, which opens the detail panel with the name ready to type. On the Sizing tab, click the **+ Rib** button in the overlay to open a create modal with cascading theme → backbone → name selectors.
Undo / Redo	On the Map and Sizing tabs, Ctrl+Z undoes the last edit and Ctrl+Y redoes (Cmd+Z and Cmd+Y on a Mac). The other tabs have no undo key, but their edits are in the same history, so open Map or Sizing to undo them. Up to 30 steps, in-session only. Undo history resets on page refresh. Works on AI-generated content.
Names that cannot be blank	Product, release, and sprint names are required — clearing one and clicking away restores the previous value, exactly as if you had pressed Escape. This keeps a product exportable, since an import needs all three. Theme, backbone, and rib item names may be left blank.
Needs Attention	The Insights tab flags four categories: **progress not counting** (next row), **unsized** (no t-shirt size, or a size no longer in the size list, which it names), **unassigned** (not in any release), and **incomplete allocations** (percentages that do not sum to 100%, above or below). Resolve all four for accurate point totals and burn-up data.
Progress not counting	Recorded progress that is in no total: it sits on a release the rib has left, or duplicates an entry that counts. Needs Attention lists the rib, release, sprints, and what would count. **Bring here** adds the records to the rib's current release; the confirm shows what the rib will read, and past sprints are recalculated, so a Forecaster re-send can change. **Remove** takes the records off the rib. Notes stay either way. A rib split across releases, a rib on no release, and a duplicate entry offer Remove only. For a split rib, type the figure on the release it belongs to, then Remove the record.
Theme colors	Assign one of 8 colors (blue, teal, violet, rose, amber, emerald, indigo, orange) to each theme in the Structure tab — these color Map headers and XLSX theme rows. Separate from theme colors, rib cards can also be individually flagged with one of 7 card flag colors (red, orange, yellow, green, blue, purple, gray) for team triage on the Map and Sizing tabs.
Progress grouping	In the Progress tab, switch the group-by selector to view progress by Release, Backbone, or Theme. Release grouping shows each rib's allocation row separately — useful for tracking split-allocated items. Backbone and Theme grouping give a higher-level, read-only picture. Expand or collapse individual groups for focused review.
Team workflow	In Cloud mode, share a product with teammates via Settings → Sharing, or point at its tile on the Products page and click **Share** (cloud mode, owners only). Owners can add editors (full edit access) and viewers (can look, but their changes are not saved). Use Export Attribution (Cloud Storage modal) to embed your name and identifier in exported JSON files.

■ **Tip:** Use the Insights **Needs Attention** panel as a pre-release health check: when every category is clear the panel disappears, which means your release plan is fully specified and all recorded progress is counting.

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