

CA Agile Vision™ and CA Product Vision™

Administration Guide

Winter 2011



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Support

The following types of support are available for CA Agile Vision and CA Product Vision customers:

CA Agile Vision Team Edition Support

For your convenience, CA Technologies provides a self-supported [CA User Community](#) Online Forum where you can access information about Agile Vision, ask questions, and share experiences with other users.

Email or phone support is unavailable. There is no guarantee that issues reported through the community forum will be monitored by CA Support.

If you have comments or questions about documentation, you can submit questions or feedback on the CA User Community Online Forum.

CA Agile Vision Enterprise Edition and CA Product Vision Support

For your convenience, CA Technologies provides one site where you can access the information you need for your Home Office, Small Business, and Enterprise products. At <http://ca.com/support>, you can access the following:

- Online and telephone contact information for technical assistance and customer services
- Information about user communities and forums
- Product and documentation downloads
- CA Support policies and guidelines
- Other helpful resources appropriate for your product

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Chapter 1: Overview

This section contains the following topics:

[About Agile Vision](#) (see page 7)

[About Product Vision](#) (see page 8)

[Quick Tour](#) (see page 8)

About Agile Vision

CA Agile Vision (Agile Vision) enables customers to manage products that follow the scrum methodology in an intuitive and simple manner. Agile teams can plan product releases based on date, demand, and capacity. Agile Vision is web-based, so team members can participate in sprint planning, view, and update status from wherever they are located.

Using Agile vision, agile development teams can easily do the following:

- Create and monitor sprints using a timebox approach, and according to demand and capacity
- Create, update, and decompose stories while supporting role-based access to rank and assign them to team members
- Facilitate daily standup meetings
- Create burndown charts
- Calculate team velocity
- View and manage backlog/task status

Note: This document assumes that Agile Vision users are familiar with scrum methodology and agile terminology.

About Product Vision

Product Vision lets you manage requirements for your business. Using Product Vision, you can do the following:

- Create and edit requirements.
- Break any requirement into smaller child requirements and view the parent child hierarchy.
- Merge requirements to create a single requirement.
- Associate requirements with products, releases, features, sources, and personas.
- View traceability for requirements from the source who requested the requirement through requirement completion.
- View a requirement's associated user story in Agile Vision.

Quick Tour

The user interface is arranged in the following manner:

- Header—In addition to the product title, the header also displays the following information:
 - Title of the current page
 - Name of the current user
 - Global actions such as Help, About, Setup, and Logout.

If you are an Agile Vision user, you can click the username link to navigate to the User Detail page. On this page, you can view and edit the user and product notification settings for the products to which you are assigned.

- Menus—Depending on your purchased license, Agile Vision, Administration, and Product Vision menus are available. These menus let you move to different areas so that you can create and manage products and requirements. Pointing your cursor to a menu name displays its contents. When you select a menu item, breadcrumbs appear displaying the menu path.
- Workspace—The workspace is the full-screen area that displays to the right of the menus. Some workspace pages, such as the Backlog page, can display a split pane layout. The Sprint Detail page is tabbed to provide a comprehensive view of the entire sprint on one page.

You can navigate to most pages from multiple points. For example, you can view and edit user story details from the Backlog and Sprint Detail pages. Most Agile Vision pages allow you to set up and manage your products more easily.

Administration Menu

The Administration menu enables you to view and administer your agile products. All users have view access to products, releases, sprints, and reports for which they are team members.

Users with administrator access rights, can also do the following tasks:

- Create products
- Create releases
- Create sprints
- Generate and distribute reports
- Create and manage users

The Administration menu groups the product administration pages into the following sections:

Organization

The Organization menu enables you to manage the users that are associated with your agile products.

- Users—Lets you add scrum participants to Agile Vision from the set of users with access to Salesforce.com. Users can then be added as members of a scrum team.

Application

Application tasks enable administrators to create products and their components, and participating team members to view product component details.

The Application menu contains the following pages:

- [Products](#) (see page 17)
- [Releases](#) (see page 20)
- [Sprints](#) (see page 24)

Configuration

The Configuration menu contains the following pages:

- Reports—Navigates you to the Salesforce.com Reports page. Your access rights determine the tasks you can perform here. For help setting up Reports, click the Help for this Page link
- Configuration—Allows you to configure categories and product and requirement states
- Integration—Allows you to enable Agile Vision integration with third parties.

Agile Vision Menu

You use the Agile Vision menu to access the pages that enable you to manage all aspects of your agile products. You can do the following:

- View and manage the sprint backlog
- Create and manage user stories
- Create, manage, and assign teams to user stories
- Create and manage user story tasks.

The Agile Vision menu groups planning and management tasks into the following sections:

Overview

The Overview menu contains the following personal and product-tracking pages.

- Home Page
- Dashboard

Planning

Use the selections in the Planning menu to plan and manage your products and sprints. You can view the details of sprints, user stories, and tasks. And you can create and edit user stories and tasks that you are participating in.

The Planning menu contains the following pages:

- Backlog
- Sprint Detail
- Epics
- Themes

Resources

Use the Resources menu to work with scrum teams and team members, assign a team to one or more sprints, and define the team sprint velocity. This menu contains the following page:

- Teams

Product Vision Menu

Use the Product Vision menu to access the pages that let you manage all aspects of requirements for products.

The following menu sections appear on the Product Vision menu:

Business Planning

Use the selections in the Business Planning menu section to set up the sources and personas that let you track the origin of a requirement to its original requestor. There is no security around the contents of this menu section. All Product Vision users can view and edit the contents found here.

Detailed Planning

Use the selections in the Detailed Planning menu section to set up products, releases, features, and requirements. Role-based security controls the access to the components found under this menu section.

Setup

Setup navigates to the Salesforce.com setup screen. Your access rights determine the tasks you can perform. For help using Setup, navigate to the Setup page and then click the Help for this Page link.

Page Features

The Agile Vision and Product Vision pages have a number of convenient features to help you set up and manage your products more easily.

View Filters

Some pages have a filter below the header that enables you to control what you view on the page. For example, you can filter the Sprint Detail page to view details by product, sprint, and team. Select a product to constrain the list of sprints to only those sprints associated with the product. Select a sprint to constrain the Team filter choices further to teams assigned to the sprint. The data displayed on the Sprint Detail pages shows only information relating to the chosen team for the chosen sprint.

The filtered view becomes the default view on subsequent visits to the Backlog, Product Dashboard, and Sprint Detail pages until you change the settings.

Tool Tips and Hover Text

Tool tips display for buttons and links on pages throughout Agile Vision and Product Vision. On pages such as the detail pages, where a product or its related components appears as a link (underlined), hover text displays pertinent information about the component. Users can quickly view information without navigating away from their current page. For example, on the User Story Detail page, the hover text for Sprint displays:

- Sprint name
- Sprint start and end dates
- Goals
- Risks

If users need more information than what is displayed in the hover text, or they need to change properties, they can click View or Edit within the hover text to navigate to the respective pages.

Navigation Links

Users can navigate to most pages from almost every Agile Vision or Product Vision page. On list pages, action items such as Edit or View appear in an Action column. Clicking Edit navigates to the edit page for the product or component being viewed. Clicking View navigates to its detail page.

Names of products and their components appear as underlined text. Clicking these links navigates to their respective detail pages. Quick info cards that appear as hover text also contain view and edit buttons.

On pages that are not main menu pages, a Back button on the header navigates to the previous page.

Sort a Table

On pages where data is displayed in table format, users can sort the table on any of the columns.

Note: You cannot sort user stories and tasks on the Backlog page. They are ordered by rank only.

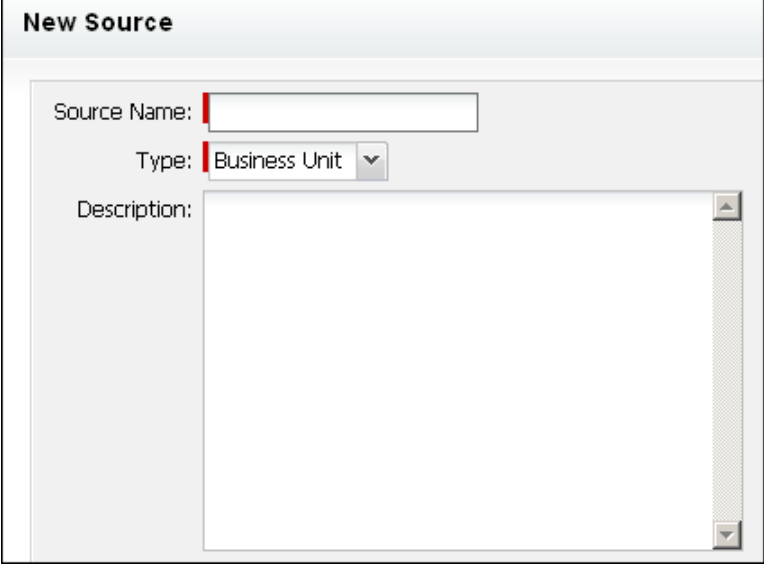
To sort a table

1. Move the cursor over a list heading.
2. Click the list menu button, and click Sort Ascending or Sort Descending.

The contents of the table re-display in the sort order selected.

Required Fields

Fields with a red border on the left side are required. The following illustration shows the two fields required for creating a new source: Source Name and Type.



The screenshot shows a form titled "New Source". It contains three fields: "Source Name:" with a text input field, "Type:" with a dropdown menu showing "Business Unit", and "Description:" with a large text area. The left side of the "Source Name:" and "Type:" fields has a red border, indicating they are required. The "Description:" field has a white border.

You cannot save changes on the page unless these fields contain valid data.

Auto Suggest for Lookups

Auto suggest displays a list of values that matches the characters entered in the text field of a lookup attribute. For example, if you type *Bo* in a lookup text field, the system displays a list of suggested values containing the string *Bo*. Select the appropriate value from the list. Adding additional letters to the string further narrows the suggestions.

List Display and Pagination on the Backlog page

A large product can have hundreds of user stories. By default, Agile Vision displays 50 user stories at one time on the Backlog page. To move forward and backward through the pages, click the navigation buttons at the top of the work area.

A pagination tool located at the top of the work area displays the user story count on the page and the total number of user stories for the product.

You can set the number of user stories you want to display on each page. If you navigate to another page you must reset it when you return.

To set the number of stories to display

1. Click the down arrow on the Show field.
2. Select the number of stories. The minimum number is ten stories. The maximum is 1000.

Editable List Page Fields

Many fields on list pages can be edited and saved directly.

Click in a list page field to begin editing. If the field can be edited, it activates so that you can make changes.

When you make changes to a field, a small red triangle appears in the upper left of the field to indicate that changes have been made.

The following editing and selection tools are available for editing list fields:

- Text boxes
- Drop-down lists
- Check boxes

Create a Backlog Page Filter

On the Backlog page you can create and save a favorite or frequently used view filter, so that you don't have to reset the product backlog view each time. This becomes your default view on subsequent visits to the page until you change the settings or remove the filter.

To remove the filter, click Remove Filter

To create a filter

1. On the Backlog page, click Show Filter.
2. Select and clear the filters as needed.
3. Enter a name for the filter, and click Save.

Chapter 2: Setup

This section contains the following topics:

[About Users](#) (see page 15)

[About Products](#) (see page 17)

[About Releases](#) (see page 20)

[About Sprints](#) (see page 24)

[Configure Product Vision Values](#) (see page 26)

About Users

The Users page displays a list of all the users from your Force.com org who can be part of scrum teams associated with products and assigned to user stories and tasks. You can filter the list of users by all users (the default) or by product.

From the users list, you can do the following:

- [View user details](#) (see page 16)
- [Add users](#) (see page 15)

Add Users

Add an user as one of the following before adding them to a scrum team:

- Agile Vision user
- Product Vision user
- Agile Vision and Product Vision user

The Users page lists these users indicating if they are Agile Vision users, Product Vision users or both.

Note: The options to add an user as an Agile Vision user or Product Vision user are available only if the user has licenses for both.

To add a user

1. Go to the Administration menu and select Users from the Organization menu.
The Users page appears.
2. Click New User.
The User Edit page appears.

3. Complete the following fields:

Salesforce User

Defines the name of the user you want to add.

Agile Vision

Indicates if the user is an Agile Vision user.

Product Vision

Indicates if the user is a Product Vision user.

4. Click Save.

The User Detail page appears. From this page you can edit the user and set up product notifications.

View User Details and Set Product Notifications

The Agile Vision User Detail page displays information about a user including the username, email address, and job title. From this page, you can view the notification settings of a user for the products that they are assigned to. Based on these settings, users receive email notifications for changes to their products.

You can edit your own details and settings for each product that you are a member of. The administration user can edit the settings for any user.

To set up product notifications for a user

1. From the Users page, click the View link for the user.

The User Detail page appears.

2. View or edit the following product settings and click Save:

Notify me when I make updates

Indicates if the user receives an email notification when they create, update, or delete a user story, issue, or task for any of the products to which they are currently assigned.

Default: Not Selected

Notify me when a user story/issue/task I created is updated/deleted

Indicates if the user receives an email notification when a user story, issue, or task that they created is updated or deleted for this product.

Default: Selected

Notify me when a user story/issue/task I am assigned is created/updated/deleted

Indicates if the user receives an email notification when a user story, issue, or task that they are assigned to is created, updated, or deleted for this product.

Default: Selected

Notify me when user story/issue/task assigned to team is created/updated/deleted

Indicates if the user receives an email notification when any user story, issue, or task assigned to their team in the product is created, updated, or deleted.

Default: Not Selected

About Products

The Products page lists all products. You can filter the view to show all products (the default), or sort by the last product created.

If you are integrating Agile Vision with CA Clarity, you can also view and manage the integrated products from the Products page.

See the Agile Vision Integration Guide for more information.

When creating a product, you can add an optional prefix that is automatically added, together with a number, to the IDs of all user stories and tasks created for the product. The prefix adds uniqueness to the user story or task. The prefix has a maximum length of six characters and must be unique and consist of alphanumeric and special characters.

The number that accompanies the prefix automatically increments for each story or task created. For example, if your product prefix is Test, new user stories are automatically assigned the ID Test-1, Test-2, and so on. New tasks have the ID Test-T0, Test-T1, and so on. After you create the product, you cannot change the prefix.

From the Products page, you can:

- [Create a product](#) (see page 18)
- [View details about a product](#) (see page 19)
- Edit product properties
- [Manage integrated products](#) (see page 19)

Create or Edit Products

When you create and save a product, a unique ID is automatically generated for it. You can use this ID to link an Agile Vision product to a CA Clarity project. After creating a product, you can edit any of its properties except the product prefix. To edit a product, from the Products page, click Edit next to the product you want to edit.

To create a new product

1. Go to the Administration menu and select Products from the Application menu.

The Products page appears.

2. Click New Product.

The Product Edit page appears.

3. Complete or edit the following fields as applicable:

Product Name

Specifies the unique name of the product.

Limits: 80 characters

Product Prefix

Defines a unique prefix to be added to the product name. You cannot change the prefix after the product is created.

Limits: 6 characters

Product Description

Defines the purpose of the product and relevant information, if any.

Limits: 32,000 characters

4. Click Save.

The Product Detail page appears.

View Product Details

The Product Detail page contains information relating to a product, such as releases and scrum teams that are part of the product. You can access this page by clicking View on the Products list page.

From the Product Detail page you can do the following tasks:

- Edit product properties
- [Delete a product](#) (see page 19)
- Create scrum teams
- View scrum team details
- Edit scrum team properties
- [Create releases](#) (see page 20)
- [View releases](#) (see page 23)
- [Edit releases](#) (see page 22)

Delete a Product

An administrator or user with super user privileges can delete a product. For example, an administrator might want to delete a product if it was created with incorrect information.

A product must meet the following conditions to be deleted:

- It cannot contain any releases, sprints, or user stories
- It cannot be active

How to Manage Integrated Products

If you are integrating with CA Clarity, you can view the integrated products from the Products page in Agile Vision. You can manage these products as follows:

- Assign users to product teams.
- Create sprints, user stories, and tasks.
- Assign resources to user stories and tasks
- Report progress on tasks using worklogs.

See the *Agile Vision Integration Guide* for more information.

About Releases

Some organizations decide their release schedule in advance, and others decide to release whenever a sprint ends and it seems advantageous to do so. Agile Vision supports both strategies. With either approach, a release happens at the end of a sprint and contains all the functionality implemented in all the sprints since the last release. Therefore, a release contains one or more sprints.

The Releases page lists all the releases. You can filter the view to show all releases (the default), or the last release created.

If you are integrating with CA Clarity, you can also view and manage the integrated releases from the Releases page.

See the Agile Vision Integration Guide for more information.

From the Releases page, you can do the following:

- [Create a release](#) (see page 20)
- [View details about a release](#) (see page 23)
- [Edit release properties](#) (see page 22)

Create a Release

Note: You can also click New Release on the Product Detail page to create a new release. When you create and save a release, an unique ID is automatically generated for it. You can use this ID to link this release to CA Clarity.

To create a release

1. Go to the Administration menu and select Releases from the Application menu.
The Releases page appears.
2. Click New Release.
The Edit Release page appears.
3. Complete the following fields.

Release Name

Specifies the name of the new release.

Limits: 80 characters

Start Date

Specifies the starting date for the release. To ensure the best burndown data for your release, this date must be at least as early as the start date of the first sprint in the release.

Required: Yes

Format: m/d/yy

Active

Specifies whether the release is active. Inactive releases do not appear as options in the filters throughout Agile Vision.

Default: Active

Product

Specifies the unique name of the product.

Required: Yes

Release Date

Specifies the delivery date for the release. The release date and start date can be the same. To ensure the best burndown data for your release, ensure this date is at least as late as the end date of the last sprint in the release. Teams who do not know the release date when they start a release can update the release date as new sprints are added.

Format: m/d/yy

Description

Defines the purpose of the object and provides additional relevant information.

Limits: 255 characters

4. Do one of the following:
 - To create the release, click Save.
The Release Detail page appears. From this page you can edit release properties and create a sprint as a sub-item of the release.
 - To create the release and create additional releases, click Save and New.
The release is created and the fields on the Edit Release page clear.

Edit Release Properties

After creating a release a user with super user or administrative privileges can modify any of its properties such as the start and end dates of a release. When editing the start and end dates of a release, verify that they fall outside the start and end dates of all sprints in that release.

When you change the release date for a project, the burndown and velocity are recalculated for the altered number of days. The charts on Sprint Detail and Dashboards pages update accordingly.

To edit release properties

1. Access the Release Edit page in one of the following ways:
 - From the Release list page, click Edit for the release you want to edit.
 - In the Releases section of the Product Detail page, click Edit for the release you want to edit.
2. Change the following fields, and click Save.

Release Name

Specifies the name of the new release.

Limits: 80 characters

Start Date

Specifies the starting date for the release. To ensure the best burndown data for your release, this date must be at least as early as the start date of the first sprint in the release.

Required: Yes

Format: m/d/yy

Active

Specifies whether the release is active. Inactive releases do not appear as options in the filters throughout Agile Vision.

Default: Active

Product

Specifies the unique name of the product.

Required: Yes

Release Date

Specifies the delivery date for the release. The release date and start date can be the same. To ensure the best burndown data for your release, ensure this date is at least as late as the end date of the last sprint in the release. Teams who do not know the release date when they start a release can update the release date as new sprints are added.

Format: m/d/yy

Description

Defines the purpose of the object and provides additional relevant information.

Limits: 255 characters

Delete a Release

A release can only be deleted by a user with super user privileges. This action is performed on the Release Detail page. Once the delete is confirmed it cannot be canceled.

Deleting a release has the following results:

- All sprints associated with the release are also deleted.
- All user stories assigned to the release and sprints become unassigned.
- The release and sprints no longer appear in the view filters.
- The release and sprints cannot be selected for association with the product or any objects of the product.
- Users cannot view charts for the release or sprints.

View Release Details

The Release Detail page contains information relating to a release, including sprints that are part of the release. This page displays immediately after creating a new release. You can access this page by clicking View on the Releases list page, or by clicking the release name on the Product Detail page.

From the Release Detail page you can do the following tasks:

- [Edit release properties](#) (see page 22)
- [Delete a release](#) (see page 23)
- [Create a sprint](#) (see page 24)

About Sprints

The Sprints page lists all active sprints created for all products. You can also filter the view to display the sprint list sorted by the last one created. The filter selection is saved and used on subsequent visits to the page, until you change it.

From the Sprints page you can do the following:

- [Create a new sprint](#) (see page 24)
- [View details about a sprint](#) (see page 26)
- Edit sprint properties

Create a Sprint

You can create a sprint from the Sprints page or from the Release Detail page.

After creating a sprint, a user with super user privileges can edit any of its properties including the start and end dates of a sprint if the sprint has not completed. Changing sprint dates causes burndown and velocity to be recalculated. The charts on Sprint Detail and Dashboard pages update accordingly. To edit a sprint, on the Sprints page, click Edit next to the sprint name you want to edit.

To create a new sprint

1. Go to the Administration menu and select Sprints from the Application menu.
The Sprints page appears.
2. Click New Sprint.
The Sprint Edit page appears.
3. Complete the following fields:

Sprint Name

Specifies the name of the sprint.

Required: Yes

Limits: 80 characters

Start Date

Specifies the starting date for the sprint. The sprint start and end dates must fall within the release start and end dates.

Required: Yes

Format: m/d/yy

Product

Specifies the unique name of the product.

Required: Yes

Active

Specifies whether the sprint is active. Inactive sprints do not appear as options in the filters throughout Agile Vision.

Default: Active

End Date

Specifies the ending date for the sprint. The sprint start and end dates must fall within the release start and end dates.

Required: Yes

Format: m/d/yy

Release

Specifies the name of the release the sprint is associated with.

Required: Yes

Goals

Specifies the expected results for the sprint.

Limits: 3000 characters

Risks

Specifies any factors that might affect the success or results of the sprint.

Limits: 2000 characters

4. Click Save.
The Sprint Detail page appears.

Delete a Sprint

Only a person with super user privileges can delete a sprint (the Delete button does not display for other users). Deleting a sprint has the following effects:

- All sprint data specific to the sprint is deleted
- Any user stories assigned to the sprint become unassigned
- Any teams assigned to the sprint are removed
- The sprint does not appear in the list for burndown chart rendering
- The sprint does not display in burndown charts

View Sprint Details

The Sprint Detail page contains information relating to a sprint, including assigned teams and any retrospective comments added at the close of the sprint. This page displays immediately after creating a new sprint. You can access the Sprint Detail page from the following pages:

- In the sprint backlog section of the Backlog page
- On the Release Detail page
- On the Sprints page

From the Sprint Detail page, you can do the following tasks:

- Edit sprint properties
- [Delete a sprint](#) (see page 25)
- Edit scrum team properties
- Create a user story
- Edit a user story
- Create a task
- Manage the sprint

Configure Product Vision Values

You can define the values that appear as options in some drop-down fields for products and requirements. The values for the following fields on Product Vision pages can be configured:

- Product Edit page
 - [State](#) (see page 30)
- New Requirement and Requirement Edit pages
 - [Category](#) (see page 27)
 - [State](#) (see page 29)

About Categories

Categories are a way to set up a self-defined classification system to order your requirements. You can then sort on the Category column in the requirements list to view requirements by category.

You can create as many categories as needed. The category can be assigned when you create a requirement, but it is not a required field.

The following example shows one way to categorize requirements:

- Market requirement
- Technical requirement
- Functional requirement
- Non-functional requirement

Create a Category

To create a requirements category

1. Click the Administration menu and select Configure from the Organization menu.
2. Click Categories.
3. Click New Category.
The create page appears.
4. Enter the category name in the Category field.
5. Click Save and Close.

Edit Category Details

To edit a category

1. Click the Administration menu and select Configure from the Organization menu.
2. Click Categories.
The categories list appears.
3. Locate the category in the list and click Edit in the Actions menu.
4. Make changes to the category name and click Save.

View Category Details

To view category details

1. Click the Administration menu and select Configure from the Organization menu.
2. Click Categories.
The categories list appears.
3. Locate the category in the list and click View in the Actions menu.
4. Do one of the following:
 - Change the owner name by clicking [Change] next to the owner name.
 - View information about the creator of the category.
 - Click Edit to make changes to the category value.

About Requirement States

States are a way to classify requirements according to where they are in your workflow. You can sort on the State column in the requirements list to view requirements by state.

You can create as many states as needed. The state can be assigned when you create a requirement, but it is not a required field.

The following example shows some states that you can use:

- Submitted
- Reviewed
- Accepted
- Estimated
- In process
- Deferred
- Completed
- Delivered

Create a Requirement State

To create a requirement state

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Requirement States.
3. Click New State.

The create page appears.

4. Enter the state name in the Requirement State field.
5. Click Save and Close.

Edit Requirement State Details

To edit a requirement state

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Requirement States.

The requirement states list appears.

3. Locate the requirement state in the list and click Edit in the Actions menu.
4. Make changes to the requirement state name and click Save.

View Requirement State Details

To view requirement state details

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Requirement States.

The requirement states list appears.

3. Locate the requirement state in the list and click View in the Actions menu.
4. Do one of the following:
 - Change the owner name by clicking [Change} next to the owner name.
 - View information about the creator of the requirement state.
 - Click Edit to make changes to the requirement state value.

About Product States

States are a way to classify products according to where they are in your workflow. You can sort on the State column in the product list to view products by state.

You can create as many states as needed. The state can be assigned when you create a product, but it is not a required field.

You can create states according to you specific business needs. The following example shows some product states that you can use:

- Submitted
- Reviewed
- Accepted
- Estimated
- In process
- Deferred
- Completed
- Delivered

Create a Product State

To create a product state

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Product States.
3. Click New State.
The create page appears.
4. Enter the state name in the Product State field.
5. Click Save and Close.

Edit Product State Details

To edit a product state

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Product States.
The product states list appears.
3. Locate the product state in the list and click Edit in the Actions menu.
4. Make changes to the product state name and click Save.

View Product State Details

To view product state details

1. Click the Administration menu and select Configure from the Organization menu.
2. In the States section, click Product States.
The product states list appears.
3. Locate the product state in the list and click View in the Actions menu.
4. Do one of the following:
 - Change the owner name by clicking [Change} next to the owner name.
 - Click the name link in the Created By field to view information about the product state's creator.
 - Click Edit to make changes to the product state value.

Chapter 3: Agile Vision Third-Party Integrations

This section contains the following topics:

[About Agile Vision Third-Party Integrations](#) (see page 33)

[Enable Agile Vision Third-Party Integrations](#) (see page 33)

[Disable Agile Vision Third-Party Integrations](#) (see page 34)

[Map an Agile Vision Product to a Quality Center Product](#) (see page 35)

About Agile Vision Third-Party Integrations

You can configure Agile Vision to integrate with the following third-parties:

- CA Clarity. Create and manage requirements in an agile environment while adhering to the traditional project governing process.
- JIRA. Manage user stories and issues from a single location. Track issues in the backlog and report on issues for each user story.
- HP Quality Center (Quality Center). Track product quality directly from each user story.

See the *Agile Vision Integration Guide* for more information.

Enable Agile Vision Third-Party Integrations

You can enable Agile Vision to integrate with the following third-party issue management and tracking tools:

- JIRA
- HP Quality Center

To enable Agile Vision integration with a third-party tool

1. Click the Administration menu and select Integration from the Configuration menu. The Integration Detail page appears.
2. Complete the following fields:

Integrate with JIRA

Specifies if integration with JIRA is enabled or not. If this check box is selected, a View in JIRA field appears on the detail page of an issue that is imported from JIRA.

JIRA URL

Defines the URL for the JIRA server for issues created in JIRA and imported into Agile Vision using the Issue Sync Service. The View in JIRA field on the detail page of an issue displays this URL if the issue is synchronized with JIRA. You can click the URL to view the issue in JIRA while logged in Agile Vision.

Example: `http://jira.ca.com/browse/` (where *jira.ca.com* represents the hostname and *browse* represents the directory where the issue resides).

Integrate with Quality Center

Specifies if integration with Quality Center is enabled or not.

3. Click Save.

Disable Agile Vision Third-Party Integrations

At any time, you can disable the third-party integrations with Agile Vision.

Note: Unselecting the integration options on the Integration page only hides the fields related to the third-party tools in Agile Vision. This action has no impact on the synchronization jobs that run in the background. Issues and cases continue to be updated from the third-party tools. To disable the integrations completely, you must disable the synchronization jobs from the third-party tools.

See the *Agile Vision Integration Guide* for more information.

To disable Agile Vision integration with a third-party tool

1. Click the Administration menu and select Integration from the Configuration menu.
The Integration Detail page appears.
2. Unselect the following check boxes as desired:
 - Integrate with JIRA
 - Integrate with Quality Center
3. Click Save.

Map an Agile Vision Product to a Quality Center Product

Before mapping an Agile Vision product to a Quality Center project, configure Agile Vision to enable QC integration.

After mapping a project, if you delete this project in Quality Center, this project is removed from the mapping list in Agile Vision.

To map an Agile Vision product to Quality Center

1. Click the Administration menu and select Products from the Application menu.
The Products page appears.
2. Click New Product or click the Edit link for an existing project.
3. In the HP Quality Center section, select a Quality Center project from the Map this project to drop-down.
4. Click Save.

Appendix A: Importing Data

Force.com provides a Data Loader client that you can use to import data in bulk. Use a CSV file to import the data. You must have administrator or super user privileges to download the Data Loader.

Note: The following procedure was accurate at the time it was documented. However, the Data Loader is a Force.com application, and changes made to the application by Force.com can render the procedure outdated.

To set up the Data Loader for importing data

1. Click Setup in the header.
The Salesforce.com Setup page appears.
2. Click Data Management in the Administration Setup menu
The Data Management page appears.
3. In the Data Management section, click Download the Data Loader.
4. Install the data loader.
5. Start the data loader and click Cancel to close the welcome page.
6. Click Settings and select Settings.
The Settings window appears.
7. Provide the following information and click OK:

Server URL

`https://login.salesforce.com`

Proxy host

Your company proxy details

Proxy port

Your company proxy port

Proxy username

Your company proxy username

Proxy password

Your company proxy password

8. Log in with your user name and password.

Note: To obtain the ID for the reference objects or the display ID in the detail pages, export the object and look at the ID column.

Appendix B: Access Rights

This section contains the following topics:

[Agile Vision Access Rights](#) (see page 40)

[Product Vision Access Rights](#) (see page 41)

Agile Vision Access Rights

The following user profiles are available with Agile Vision:

- Super-user
- System Administrator
- Regular user

A super-user has the rights to view, create, edit, and delete the following regardless of product membership. They also have the rights to participate in a product provided they are on the product team.

- Product
- Release
- Sprint
- Team

The super-user needs to be a member of the product to view, create, edit, and delete the following:

- Epics
- User stories
- Issues
- Tasks
- Themes

A system administrator has the rights to do the following tasks:

- Create new Salesforce.com users
- Create Agile Vision users
- Create and manage all aspects of any product

A basic Agile Vision user has the rights to the following tasks:

- Participate in a product as part of the product team
- View products that they are a member of and associated releases and sprints
- Create, edit, and delete epics, user stories, issues, tasks, and themes
- Edit specific team attributes (for example, velocity, points, and virtual wall color mapping) once on the team

The basic user can only select the products for which they are members on the Sprint Detail, Backlog, Dashboard, and other pages where you can filter data based on product. They can view and use the Virtual Wall and User Stories & Charts capabilities from the Sprint Detail page.

For additional access rights information, contact your Force.com System Administrator.

Product Vision Access Rights

Product Vision provides two user profiles:

User

A person with this profile can do the following tasks:

- Create and manage products, releases, and features
- Create and manage requirements
- Create and manage sources and personas

Super User

A person with this profile has administrator privileges to Product Vision data, but not to the Force.com operating environment. The super user can do any of the following tasks using features listed on the Administration menu:

- Add users
- Generate reports
- Configure Product Vision setup

If you are using Agile Vision with Product Vision, you must be part of a product to view any CA Agile Vision page and do any of the following tasks using features listed on the Agile Vision menu:

- Create, edit, and delete themes
- Create, edit, and manage user stories and tasks
- Edit a scrum team
- Participate in a sprint

Appendix C: Upgrade from Agile Vision Team Edition to Enterprise Edition

See the Agile Vision Release Notes on support.ca.com for information on the following:

- How to upgrade from Agile Vision Versions 1.5 and 1.7 to Version 1.8
- How to upgrade from Agile Vision Version 1.8 to Version 2.0