CA Product Vision™

Getting Started Guide

Winter 2011

Contents

Chapter 1: Introduction

This section contains the following topics:

About CA Product Vision

Product Vision lets you manage requirements for projects, services, products, releases, and features. Using Product Vision you can trace a requirement from its original requestor to its inclusion in a particular feature or release for a product. You can include detailed information about the requirement and its benefits, the source of the requirement, competing products, and ranking information that can help you make decisions on whether to include a requirement in a product release.

You can also use Product Vision to associate requirements with CA Agile Vision user stories used in the scrum methodology. This lets you track the history of a user story for any given sprint. You can see the requirement that is associated with the user story and the source that requested the requirement.

Key Product Vision Terms

Category

A *category* is way to classify a requirement. You define requirement categories for your organization specific to your business needs. Examples of categories include: Market Requirements, Technical Requirements, Functional Requirements and Non-functional Requirements.

Competitor

When you create a product, you can indicate that the product is a *competitor* product. You can store the same detailed information for a competitor product as for a product you are developing, and you can use the competing product as a source of requirements.

Feature

A *feature* is part of a product. A feature can be independent and standalone, or it can work with other parts of a product.

Persona

A *persona* can be a person or a composite of many people. It is the description of a user, customer, buyer or other individual who might cause you to create a requirement. You can link requirements to personas and sources to provide traceability and to help with the planning process.

Product

Something of value produced by your company for sale or internal company use. A *product* can be merchandise or wares, software, a building project, or any other consumable. Products also represent services, applications, or systems in an IT environment.

Release

A *release* is similar to a project, an effort that ends with the delivery of value. It usually entails a number of features and requirements.

Requirement

A *requirement* is a documented specification that describes what a particular product or service should be or do. It is a statement that defines a necessary attribute, capability, characteristic, or quality of a product or service so that it provides value to a user.

Source

A *source* can be a company or organization. You can collect information about sources and include contact information and other market information. A source can be linked to a requirement to provide traceability and context.

Traceability

The ability to trace a requirement from its origin to the lowest levels of implementation, typically a test case or work item.

User Story

A *user story* is a way to define requirements in Agile Vision. A requirement in Product Vision can be linked to its associated user story in Agile Vision if these products are used together.

Logging In

All new Product Vision users are given a user name and a temporary login password. As a convenience, you can set the check box to have Product Vision automatically populate the User Name field with your login user name. The user name and password are sent by email, usually from salesforce.com.

To log in

1. Go to the following Internet URL:

   http://login.salesforce.com/

2. Enter your user name and password and click Login.

When you first log into Product Vision, you are instructed to change your password immediately.

Quick Tour

The following sections describe the user interface and show how to use Product Vision features.

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.

Administration Menu

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

Organization

Use the selection in the Organization menu section to set up users.

Application

Use the selections in the Application menu section to set up products and releases. Although you can use the links for products and releases on the Administration menu, these components can be set up and managed more easily from the Detailed Planning menu section on the Product Vision menu.

Configuration

Use the selections in the Configuration menu to:

- Set up reports

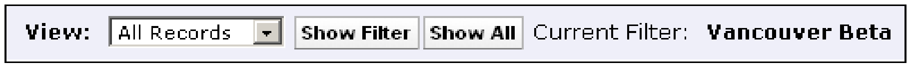
  The Reports link in the Configuration menu section navigates to the Force.com Reports screen. Your access rights determine the tasks you can perform here. For help setting up Reports, click the Help for this Page link.

- Create user-defined categories and states to organize requirements and products

Page Filters

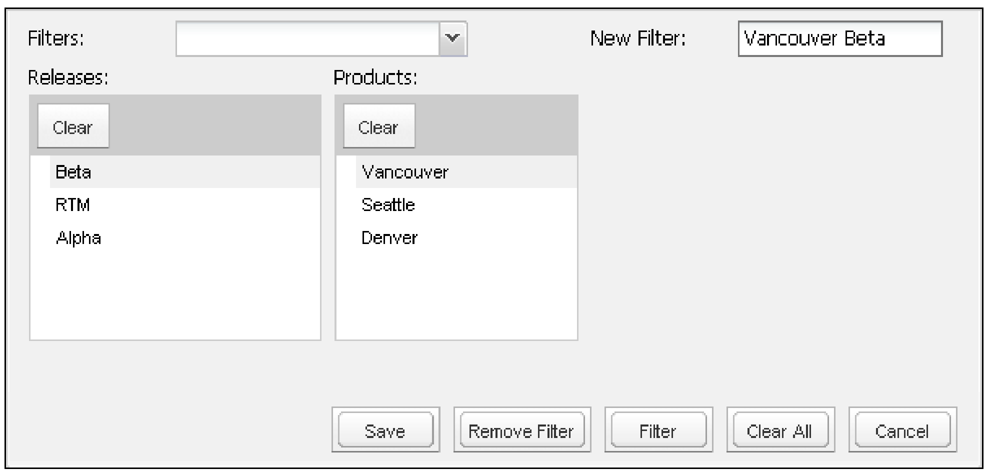
Some list pages have a filter below the header that lets you control what you view on the page. For example, you can filter the Features list page to view the listed items by product and release.

To display the filter and choose selection criteria, click Show Filter at the top of the list page. To show all items in the list page, click Show All. The Current Filter field displays the name of the filter that is currently in use on the list page.



The following figure shows a displayed filter for features. Other list pages have different filters with different selection criteria, depending on the component. You can create and use a filter without saving, or you can name and save a filter for future use. You can save multiple filters.

When you create a filter, the selection criteria remains in effect for the list page. If you leave the list page and return to it, the list is pre-filtered with the selection criteria from the filter. To remove the filter criteria for the list page, click Show All.



To filter

1. With the list page open, click Show Filter.
2. In the list boxes, select the criteria for the filter search.
3. Click Filter.

To save a filter

1. With the list page open, click Show Filter.
2. Enter a name for the filter in the New Filter field.
3. In the list boxes, select the criteria for the filter search.
4. Click Save.

To use a saved filter

1. With the list page open, click Show Filter.
2. Select the filter name in the Filters field.
3. Click Filter.

To delete a saved filter

1. With the list page open, click Show Filter.
2. Select the filter name in the Filters field.
3. Click Remove Filter.

Navigation Links

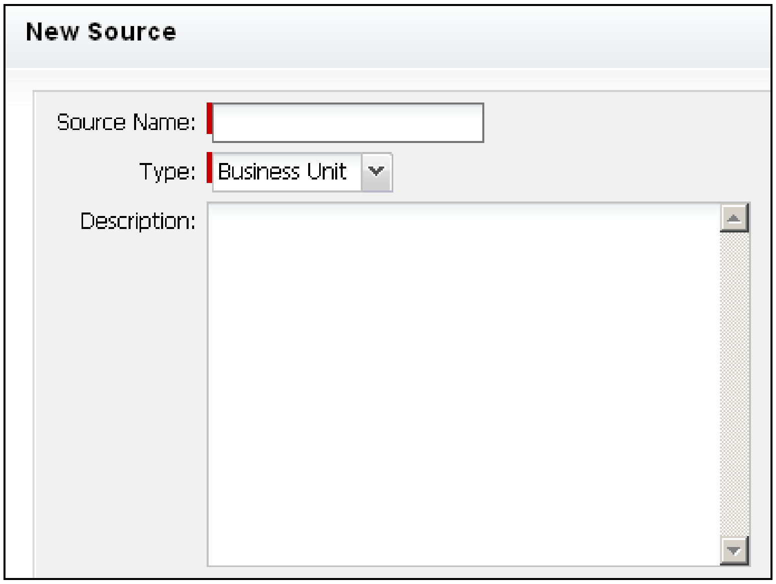
Users can navigate to most pages from almost every Product Vision page. On list pages, the action items Edit or View appear in an Action column. Clicking Edit navigates to the edit page for the product or component being viewed. Clicking View navigates to its detail page. If you are the creator of a product or component object such as a requirement, you will see both links. If you did not create the product or component, you do not have the right to edit and only the View action is visible in the Actions column.

Names of products and their components appear as underlined text. Clicking these links navigates to their respective detail pages.

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

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.



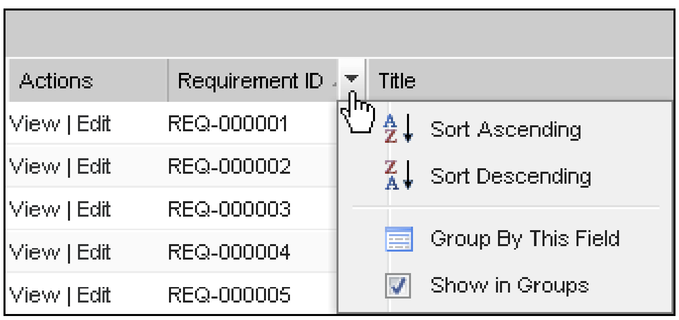
You cannot save changes on the page unless these fields contain valid data.

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.

Sort List Page Information

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



To sort a table

1. Move the cursor over a list heading.
2. Click the list menu button, and do one of the following:
   - Select Sort Ascending or Sort Descending to order the list items alphabetically in the order you want.
   - Click Group By This Field to group like items in the column together in the list.

List Display and Pagination

A large product can have hundreds or thousands of requirements. By default, Product Vision displays 100 requirements at one time on the requirements list page. You can change the number of requirements that you view on the list page to a smaller number. Once you set the number of requirements to view at one time, the number becomes the new default display number. To move forward and backward through the pages, click the navigation buttons at the top or bottom of the work area.

A pagination tool located at the top and bottom of the work area displays the count on the page and the number of the items currently displayed.

You can set the number of items you want to display on each page.

To set the number of requirements to display

1. Click the down arrow on the Show field.
2. Select the number of items.

   The minimum number is ten items. The maximum is 100.

List Page Actions

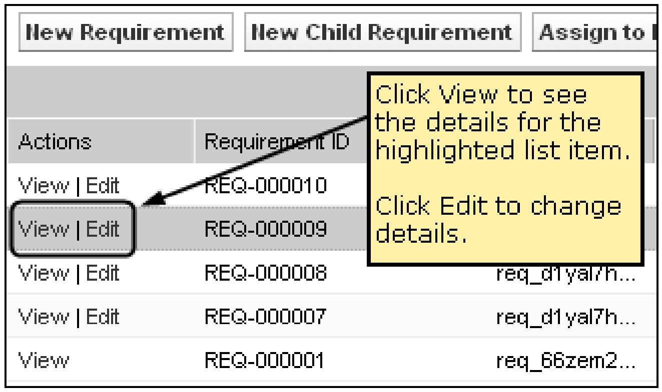
For each component you can create, a list page of the components displays. For example, Product Vision has a list page for the following components: sources, personas, products, releases, features, and requirements.

To display a component's list page, click the link in the Product Vision menu for the component.

If the Actions column on the list page contains both a View and an Edit link for a list item, you can make changes to the list item. You can use the links to do the following:

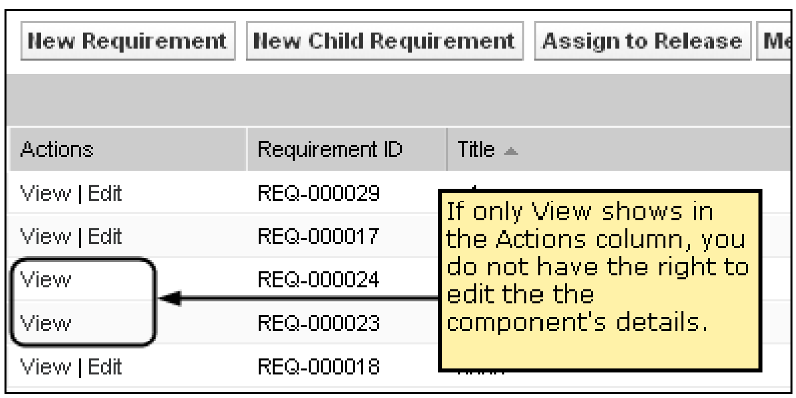
- Edit. You can open the details page for the item and make changes to the values in any of the fields that are active.

- View. You can open the detail page in view-only mode. If you decide to make changes, you can click the Edit button to change to edit mode if you are the creator of the component or the product owner of a product associated with the component.



About View Mode

If the Actions column contains only a View link, you cannot change the details for the component because you do not have the appropriate rights.



Some actions can be completed in View mode even if you are not the owner of a product or a component. The following table indicates what you can do from View mode.

View mode action	Product owner or creator can perform?	User who is not a product owner or creator can perform?
Add or delete requirements for products, releases, and features.	Yes	Yes
Open and edit requirements for products, releases and features.	Yes	No

View mode action	Product owner or creator can perform?	User who is not a product owner or creator can perform?
Add or delete releases for a product.	Yes	Yes
Open and edit releases listed for a product.	Yes	No
Add edit and delete notes for a feature or requirement.	Yes	No
Add and remove attachments for a feature.	Yes	No

Editing List Page Fields

Many fields on list pages can be edited directly, saving clicks to get to the detail page of the component you want to change.

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. To save changes made to an editable field, click Save at the top of the list view. To revert to the original field values without saving, click Discard Changes.

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

- Text boxes
- Drop-down lists

Editing Rules

The following provides general guidelines for working in Product Vision:

- You can edit or delete any component that you create.
- A product owner has the right to edit any component associated with the product.

  For example, if you are a product owner and a requirement is associated with your product, you can edit the requirement, even if you are not the creator or an assigned owner of the requirement.
- A product owner can remove a component creator's right to edit a component associated with a product.
- A product owner has the right to edit all of the features and releases associated with a product.
- A feature can have other owners besides a product owner or creator, and these additional owners also have the right to edit any requirements associated with the feature.

Chapter 2: Best Practice for Getting Started

If you are new to Product Vision, the following process explains the best way to get started entering your requirement data.

1. Create the sources and personas you intend to use first.

   Sources and personas provide knowledge about where product requirements come from and who is waiting for the fulfillment of a requirement. Having this basic information already in Product Vision lets you associate it with components like products and releases as they are created, providing traceability and context. You can create a source or persona with a requirement or product at any point, but having the information created and available for selection when other components are created saves extra clicks and rework.

2. Create products.

   One of the primary intents of Product Vision is to manage product requirements. You can create the products for which you want to track requirements and provide information on cost, owners, personas, customers, market segments, competing products, strengths, weaknesses, and opportunities. Setting up a product in Product Vision provides a history that shows the reasoning that influences the requirements chosen to be completed.

3. Create releases.

   A release can be associated with only one product. It is a way to organize requirements associated with a product into an effort that has a definite delivery time period. A release usually includes the fulfillment of a number of requirements or features.

4. Create features.

   A feature can be standalone and cover one or more releases of a product.

5. Create requirements and associate them with the necessary products, releases, or features.

Chapter 3: Sources and Personas

This section contains the following topics:

About Sources

Sources let you trace requirements back to their origins. Knowing how many sources requested a requirement and who the sources are can help you determine how quickly the requirement must be delivered. It is a factor in determining which requirements get done for a release of a product.

Sources can provide information about which geographic or market segments are involved. Product Vision provides the following source types:

- Business unit. Identifies a requirement from internal parts of your business.
- Customer. Identifies a requirement from active or prospective customers.
- Geography. Identifies a requirement specific to one or more geographies.
- Industry. Identifies a requirement specific to one or more industries.

Create a Source

Create a source to describe the originator of a requirement or an organization that is interested in having a requirement fulfilled. Once you create a source, you can edit the source to add complete information.

To create a source

1. Go to the Product Vision menu, and click Source from the Business Planning menu.

   The source list page appears.

2. Click New Source.
3. Complete the following fields:

   Source Name

   Specifies the name of the source.

Type

Specifies the source type. Once you select a type and save, the type cannot be changed.

Values: Business Unit, Customer, Geography, Industry.

Description

Provides a description of the item being created or edited.

4. Click Save and Close.
5. Complete the full information for the source by editing source details.

Edit Source Details

To edit source details

1. Open the sources list page and click Edit in the Actions column next to the source name.
2. Complete or edit the following fields:

Source Name

Specifies the name of the source.

Type

Specifies the source type. Once you select a type and save, the type cannot be changed.

Values: Business Unit, Customer, Geography, Industry.

Primary Contact

Specifies the name of the person at the source who can be contacted for information.

Primary Contact Email

Specifies the email address of the primary contact.

Primary Contact Phone

Specifies the telephone number of the primary contact.

Description

Provides a description of the item being created or edited.

3. Complete the following fields in the Customer section

Geography

Specifies the geographical area the source represents.

Revenue to Date

Indicates the revenue generated from the customer to date.

Industry

Specifies the market segment to which the source belongs.

Potential Revenue

Specifies the future revenue that may be generated from the source.

4. Complete the following fields in the Product Detail section:

Competitor Products

Specifies the competitor products that the source is associated with.

Requirements

Specifies the requirements to which the source is associated. You can associate multiple requirements to a source.

Products

Specifies the product or products to which the source applies. You can select more than one product to associate.

Personas

Specifies the personas associated with the source. You can associate more than one persona with a source.

5. Complete the following fields in the Market Information Section

Market Size

Specifies the size of the market that the source represents.

Market Share

Specifies the share of the market that the source currently has.

Market Growth

Specifies the expected growth of the market segment that the source is associated with.

Values: High, Medium, Low

6. Click Save.

View a Source

The Source Details page contains information about a source that you can view. To display the page, click View in the Actions column of the source on the sources list page.

If you are the source owner, you can click Edit on the Source Details page and make changes to the source.

In View mode you can:

- Add a new requirement for the source

About Personas

A persona can be a real person or a composite of a person who represents a buyer or someone who influences the decision to buy a product. Associating a persona with a requirement can provide detailed information about who is expecting a requirement to be completed and how the requirement fits into the business model for the person. A persona can provide information about the issues that the requirement will satisfy including business needs, pain points, and buying habits.

Create a Persona

Create a persona to indicate a person in an organization or a representative composite of a person who might influence a decision to buy your product. Once you create the persona, you can add full information by editing persona details.

To create a persona

1. Go to the Product Vision menu, and click Persona from the Business Planning menu.

   The persona list page appears.

2. Click New Persona.

3. Complete the following fields:

   Persona Name

   Specifies the name of the persona.

   Title

   Specifies the title of the persona.

Description

Provides a description of the item being created or edited.

4. Click Save and Close.
5. Complete the full information for the persona by editing persona details.

Edit Persona Details

To edit persona details

1. Open the personas list page and click Edit in the Actions column next to the persona name.
2. Complete or edit the following fields:

Persona Name

Specifies the name of the persona.

Age

Specifies the age of a persona.

Organization Size

Specifies the size of the organization that the persona belongs to.

Values: Small, Medium, Large

Influenced By

Specifies other personas that influence a persona.

Title

Specifies the title of the persona.

Gender

Specifies whether the persona is male or female.

Type

Specifies how a persona might operate within the organization.

Values: User, Buyer, and Influencer.

Description

Provides a description of the item being created or edited.

3. Complete the persona by filling in detailed information in the following freeform text sections:
   - Issues
   - Needs
   - Pains
   - Buying Habits
   - Goal

   Each text section contains a text formatting bar so that you can manipulate text.
4. Click Save.

View Persona Details

The Persona Detail page contains in depth view-only information about a persona. To display the page, click View in the Actions column of the persona on the personas list page.

To change to Edit mode from the Persona Detail page, click Edit.

Chapter 4: Product Setup

This section contains the following topics:

About Products

When you create a product, you create a detailed picture of the product for future reference. You can include information about finances, customers, competing products, geographic market segment, industry market segment, and features. You can also include more in-depth information about the product's strengths, weaknesses, opportunities, threats, and the problems addressed.

Create a Product

After you create the product, edit the product details to add complete information about all aspects of the product.

To create a product

1. Go to the Product Vision menu, and click Products from the Detailed Planning menu.

   The products list page appears.

2. Click New Product.

3. Complete the following fields:

   Product Name

   Specifies the name of the product.

   Product Description

   Provides a text description of the product.

   Planned Cost

   Specifies the intended cost of a product.

   Product Prefix

   Specifies a prefix for identifying Agile Vision user stories that make up the product backlog.

Lifecycle Stage

Specifies stage of development of a product.

Values: Concept, Under Development, Introduced, Growth, Mature, Decline, End of Life.

Planned Effort

Specifies the estimated effort to deliver the requirement.

4. Complete one of the following actions:
   - Click Save to save the Product and edit the product details.
   - Click Save and New to save the Product and create a new product.

Edit Product Details

To edit product details

1. Open the products list and click Edit in the Actions column of the product.
2. On the product's edit page, complete or edit the following fields as necessary:

Product Name

Specifies the name of the product.

Product Prefix

Specifies a prefix for identifying Agile Vision user stories that make up the product backlog.

Product Description

Provides a text description of the product.

Lifecycle Stage

Specifies stage of development of a product.

Values: Concept, Under Development, Introduced, Growth, Mature, Decline, End of Life.

Competitor

Specifies that the product is a competitor product rather than a product of your business.

Planned Revenue

Specifies the earnings that are expected from a product.

Actual Revenue

Specifies the earnings received to date on the product.

Planned Cost

Specifies the intended cost of a product.

Actual Cost

Specifies the real cost of the product to date.

Planned Effort

Specifies the estimated effort to deliver the requirement.

Actual Effort

Specifies the real effort spent to deliver the product to date.

Product Owner

Specifies the name of the owner or owners of the product.

3. Complete the freeform text sections by filling in detailed product information about the following:

   - Strengths
   - Weaknesses
   - Opportunities
   - Threats
   - Problem Addressed

   You can enter up to 32,000 characters in each text box.

4. In the multi-value selection boxes, select the values you want associated with the product for the following:

   - Personas
   - Features
   - Competing Products
   - Geography Market Segment
   - Industry Market Segment
   - Customers
   - Requirements

5. Click Save.

View Product Details

The Product Detail page contains information about a product that you can view. To display the page, click View in the Actions column of the product on the products list page.

If you are the product owner, you can click Edit on the Product Detail page and make changes to the product.

In View mode on the Product Detail page you can:

- Change the product owner
- Create a release or requirement
- Create a scrum team

About Releases

A release indicates an update or change to a product, and therefore must be associated with a single product. A feature can be associated with a product and a release, but it is not required. You can create a feature to capture information, but leave the feature unassociated with a product or release until planning is complete. If Agile Vision is also used, any releases created also appear in Agile Vision.

Create a Release

After you create the release, edit the release details to add complete information about all aspects of the release.

To create a release

1. Go to the Product Vision menu, and click Releases from the Detailed Planning menu.

   The release list page appears.

2. Click New Release.
3. Complete the following fields:

   Release Name

   Specifies the name of the release.

   Product

   Specifies the product with which the release is associated.

Description

Provides a description of the item being created or edited.

Start Date

Specifies the date when release effort begins.

Release Date

Specifies the date when release effort is complete.

Active

Specifies the release is active and can be worked on and tracked in Product Vision.

Default: Selected

4. Complete one of the following actions:
   - Click Save to save the release and edit the release details.
   - Click Save and New to save the release and create a new release.

Edit Release Details

To edit release details

1. Open the releases list page and click Edit in the Actions column of the release you want to edit.
2. On the release's edit page, complete or edit the following fields as necessary:

Release Name

Specifies the name of the release.

Start Date

Specifies the date when release effort begins.

Active

Specifies the release is active and can be worked on and tracked in Product Vision.

Default: Selected

Total Cost

Specifies the total cost of labor, material, equipment, and expense resources for the release.

Product

Displays the product with which the release is associated.

Release Date

Specifies the date when release effort is complete.

Description

Provides a description of the item being created or edited.

Total Effort

Specifies the total effort expended for the release.

3. Click Save.

View Release Details

The Release Detail page contains information about a release that you can view. To display the page, click View in the Actions column of the release on the releases list page.

If you are the release owner or the associated product's owner, you can click Edit on the page and make changes to the release.

In View mode on the Release Detail page you can:

- Add a feature to a release
- Create a requirement
- Create a sprint
- Create a baseline

About Features

A feature can be associated with a product, but it is not required. You can create a feature to capture information, but leave the feature unassociated with a product until planning is complete.

Create a Feature

After you create the feature, edit the feature details to add complete information about all aspects of the feature.

To create a feature

1. Go to the Product Vision menu, and click Features from the Detailed Planning menu.

   The features list page appears.

2. Click New Feature.
3. Complete the following fields:

   Feature Name

   Specifies the name of the feature.

   Product

   Specifies the product with which the feature is associated.

   Description

   Provides a description of the item being created or edited.
4. Click Save and Close.
5. Complete the full information for the feature by editing feature details.

Edit Feature Details

To edit feature details

1. Open the features list page and click Edit in the Actions column of the feature you want to edit.
2. Complete the following fields:

   Feature Name

   Specifies the name of the feature.

   Product

   Specifies the product with which the feature is associated.

   Feature Owner

   Specifies the owner of the feature. You can select more than one owner.

   Description

   Provides a description of the item being created or edited.
3. Click Save and Close.

View Feature Details

The Feature Detail page contains information about an individual feature that you can view. To display the page, click View in the Actions column of the feature on the features list page.

If you are the feature owner or an associated product's owner, you can click Edit on the page and make changes to the feature.

In View mode on the Feature Detail page you can:

- Create a requirement
- Add a note to a feature
- Add an attachment to a feature

Chapter 5: Requirements

This section contains the following topics:

About Requirements

You can enter requirements in Product Vision using one of the following methods:

- Click the Requirements link on the Detailed Planning menu and click New Requirement.
- Open a product, source, release, or feature in View mode and click New Requirement in the Requirements section.

Any requirement you create is listed on the Requirements list page. You can filter and sort the requirements to see only the information you want in the list.

To see the requirements for a particular product, open the details page for the product by clicking View in the Actions column of the list page. Any requirements associated with the product are listed in the Requirements section of the detail page. You can also view the requirements for a release or feature by opening them in View mode and looking in the Requirements section.

Create a Requirement

After you create a requirement, edit the requirement details to add complete information about all aspects of the requirement.

To create a requirement

1. Go to the Product Vision menu, and click Requirements from the Detailed Planning menu.

   The requirements list page appears.

2. Click New.

3. Complete the following fields:

   Title

   Specifies the name of the requirement.

   Description

   Provides a description of the item being created or edited.

   Category

   Specifies a way to group requirements that is defined by your company. Select one of the options from the drop-down.

   Complexity

   Specifies the degree of difficulty that can be expected in completing the requirement.

   Values: High, Medium, Low

   Cost Estimate

   Specifies the estimated expense of the requirement.

   State

   This field is defined by your company. Typically, this field is used to label different workflow stages for a requirement.

   Priority

   Specifies the precedence of the requirement over other requirements.

   Values: Very High, High, Medium, Low, Very Low, Not Prioritized

   Product

   Specifies the product or products to which the requirement applies. You can select more than one product to associate with the requirement.

4. Click Save and Close.
5. Complete the full information for the requirement by editing requirement details.

Edit Requirement Details

To edit requirement details

1. Open the requirements list page and click Edit in the Actions column of the requirement you want to edit.
2. On the Requirement Edit page, complete or edit the following fields as necessary:

   Title

   Specifies the name of the requirement.

   Financial Benefits

   Specifies the amount of potential profit the requirement can provide.

   Complexity

   Specifies the degree of difficulty that can be expected in completing the requirement.

   Values: High, Medium, Low

   Priority

   Specifies the precedence of the requirement over other requirements.

   Values: Very High, High, Medium, Low, Very Low, Not Prioritized

   State

   This field is defined by your company. Typically, this field is used to label different workflow stages for a requirement.

   Labor Estimate

   Specifies the estimated labor cost for the requirement.

   Cost Estimate

   Specifies the estimated expense of the requirement.

   Confidence Level

   Specifies the level of confidence the owner has in the organization's understanding of the requirement and the organization's ability to deliver the requirement.

   Values: High, Medium, and Low.

   Category

   Specifies a way to group requirements that is defined by your company. Select one of the options from the drop-down.

Parent Requirement

Specifies the requirement that is the parent of the current requirement. This field applies only to child requirements

Is Active

Specifies that the requirement is active and can be assigned to releases and features. Inactive requirements do not appear in the list views or hierarchy views.

Default: Selected

Product

Specifies the product or products to which the requirement applies. You can select more than one product to associate with the requirement.

Features

Specifies the features to which the requirement is assigned.

Releases

Specifies the releases to which the requirement is assigned. You can assign the requirement to more than one release.

Requirement Owner

Specifies the name of the owner or owners of the requirement.

Sources

Specifies the sources associated with the requirement. You can assign the requirement to more than one source.

Personas

Specifies the personas associated with the requirement. You can associate more than one persona with a requirement.

Description

Provides a description of the item being created or edited.

Problem

Specifies the problem the requirement addresses or solves.

3. Click Save.
4. Click Back to List.

View Requirement Details

The Requirement Detail page contains information about a requirement that you can view. To display the page, click View in the Actions column of the requirement on the requirements list page.

If you are the requirement owner or the owner of an associated product or feature, you can click Edit on the page and make changes to the requirement.

In View mode on the Requirement Detail page you can:

- Add a child requirement
- Add a user story (if used with CA Agile Vision)
- Add a note
- Add an attachment

View and Manage Requirements Lists

The Requirements list page has three list viewing options available:

- All Records. From this view, you can create new requirements or view and edit individual requirements.
- Requirement Hierarchy. This is the default view. Use this view to see and manage parent-child relationships between requirements and to create new requirements.
- Traceability Matrix. Use this view to see the user cases associated with a requirement. You can also click a link to see the detailed information about the requirement, including associated source and persona information.

View the Traceability Matrix

The Traceability Matrix allows you to see the origin of a requirement and any user story associated with the requirement through Agile Vision.

To view the Traceability Matrix

1. Display the requirements list page.
2. In the View field, select Traceability Matrix.
3. Click one of the following links for information:
   - Click a requirement name to see detailed information about the requirement that includes the source or persona that originated the requirement and product and release information.
   - Click a user story name to see details about how the requirement is being fulfilled in Agile Vision.

View the Requirements Hierarchy

The requirements hierarchy lets you quickly identify which requirements have been associated as parent and child. The list shows in order by parent with the children below the parent.

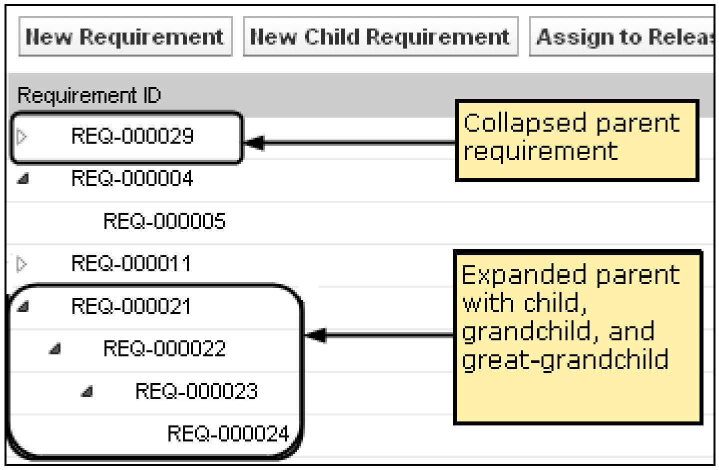
To view the Requirements Hierarchy

1. Display the requirements list page.
2. In the View field, select Requirements Hierarchy.

You can edit some fields on the requirements hierarchy list page. To edit, click in a field. If the field can be edited, it activates so that you can make changes.

Right click on a requirement to see a menu that allows you to view, edit, delete, expand or collapse the requirement.

A gray arrow indicates a collapsed hierarchy with the children hidden. A black arrow indicates an expanded parent with the children listed below. In the following illustration, the expanded hierarchy has four levels. You can create an unlimited number of levels in a hierarchy.



Appendix A: Third-Party Acknowledgements

This section contains the following topics:

Ext JS - JavaScript Library

Ext JS - JavaScript Library

licensing@extjs.com

http://extjs.com/license

Open Source License

Ext is licensed under the terms of the Open Source GPL 3.0 license.

http://www.gnu.org/licenses/gpl.html

There are several FLOSS exceptions available for use with this release for open source applications that are distributed under a license other than the GPL.

* Open Source License Exception for Applications

  http://extjs.com/products/floss-exception.php

* Open Source License Exception for Development

  http://extjs.com/products/ux-exception.php

Commercial License

This is the appropriate option if you are creating proprietary applications and you are not prepared to distribute and share the source code of your application under the GPL v3 license. Please visit http://extjs.com/license for more details.

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