CA Product Vision™

Release Notes Winter 2011



Third Edition

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- Information about user communities and forums
- Product and documentation downloads
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Chapter 1: Welcome to CA Product Vision

Welcome to CA Product Vision™ (Product Vision). The information that this document provides can help you get started with this new release.

This section contains the following topics:

Introduction (see page 7)
Requirements (see page 8)
Browsers (see page 8)
Install Agile Vision and Product Vision (see page 8)
How to Set Up Product Vision after an Agile Vision—only Upgrade (see page 12)

Introduction

CA Product Vision lets you collect and manage requirements by product, feature, customer, or persona.

Using Product Vision, you can:

- Create, edit or delete a requirement for one or more products. You can associate a requirement with specific releases, features, sources, and personas.
- Break requirements down into smaller child requirements and view a hierarchical display of the relationships.
- Merge multiple requirements into a single requirement.
- View requirements in a flat list or in a hierarchical list. From the list, you can sort to display only what you need, do inline editing of details, group the displayed items, and control pagination of sorted items.
- Manage related components such as personas, products, customers, market segments, and features. These components can be viewed individually using their respective detail pages or viewed collectively in a flat list. The flat lists contain the same sorting and editing tools available for requirements.
- View a feature and its associated requirements in a hierarchy. This view allows you to see the requirements associated with a feature.
- Associate user stories in CA Agile Vision with requirements, create sprints, and create and populate scrum teams.
- Associate ideas in CA Idea Vision with products and requirements.
- Trace a requirement from its beginnings as a customer request to completion in Agile Vision. This feature is presented as a list view. From the list, you can click links to view customers or personas associated with the requirement, and you can click a link to see the associated Agile Vision user story.

 Configure drop-down values that shape how requirements or products are defined during creation.

Requirements

Product Vision runs on the force.com platform and has the same requirements as force.com.

Browsers

Product Vision supports the following browser versions:

- Internet Explorer version 7 and later (8 is recommended)
- Firefox version 3.5.2 and later
- Safari version 4.0.4

Install Agile Vision and Product Vision

Complete the instructions in the following sections to install Agile Vision and Product Vision into existing Salesforce.com organizations.

Prepare to Install Agile Vision and Product Vision

- 1. Log into your Salesforce.com organization.
- 2. Click the Setup link to go to the Personal Setup page on Salesforce.com.
- 3. Select Company Profile from the Administration Setup menu and go to Company Information.

The Company Information page appears.

- 4. Scroll to the User Licenses section and verify that you have at least one Salesforce Platform license active. If you do not have at least one Salesforce Platform license active, contact Salesforce.com support.
- 5. Select Manage Users from the Administration Setup menu and go to Profiles.

The User Profiles page appears.

- 6. Create the following profiles by copying the Standard Platform user profile:
 - Agile Vision Super-User
 - Agile Vision User
 - Product Vision Super-User
 - Product Vision User

- Vision Super-User
- Vision User
- 7. Log out of your Salesforce.com organization.

Install Agile Vision and Product Vision

- 1. Enter the following URL in the address bar of your browser window. If you are installing into a test environment, replace "login.salesforce.com" with "test.salesforce.com" in the URL.
 - https://login.salesforce.com/?startURL=%2Fpackaging%2FinstallPackage.apexp%3Fp0%3D04tA000000Qekg).
- 2. On the Login page, enter the system administrator user name and password and click Login.
- 3. Verify the version of CA Technologies PPM package you are installing and the publisher as follows:
 - Winter 2011 (2.5)
 - CA Technologies
- 4. Click Next to advance through the wizard.
- 5. Enter the password provided to you for installing the new version and click Submit. If you do not have the required password, contact CA Support.
 - A security options page appears.
- 6. Select the security settings option to set user access by profile.
- 7. Set the following access levels for the corresponding profiles and click Next to continue:
 - Agile Vision Super-User access for the Agile Vision Super-User profile
 - Agile Vision User access for the Agile Vision User profile
 - Product Vision Super-User access for the Product Vision Super-User profile.
 - Product Vision User access for the Product Vision User profile.
 - Vision Super-User access for the Vision Super-User profile.
 - Vision User option for the Vision User profile.
- 8. Click Next to continue.
 - A page appears with the following check box: "Ignore Apex test failures that may cause the installed application not to function properly".
- 9. Select the check box only if you are instructed to do so by <u>CA Support</u>. Selecting the check box does not speed up the installation as all tests are still run.

10. Click Install.

The Processing page appears indicating that your request is in progress. When the install is complete, an email notification is sent from Salesforce.com to the email address of the user you are currently logged in as. The installation can take over 30 minutes depending on the current load on the Force.com platform.

Deploy Agile Vision and Product Vision

By default, both Agile Vision and Product Vision are enabled. If you purchased the license for only one of these services, disable the other as described below:

1. From the Agile Vision Home page, click Setup.

The Personal Setup page appears.

- 2. Select View Installed Packages from the App Setup menu.
- 3. Verify that CA Technologies PPM is installed.
- 4. Click the CA Technologies PPM package name.

The Package Details page appears.

5. Click Deploy in the Installed Package Detail section.

The Deploy Package page appears showing the package components.

- 6. Click Deploy again.
- 7. Enter the following URL in the address bar of your browser window:

https://ca-agile.na7.visual.force.com/apex/PackageSettings

- 8. Do one of the following and click Save:
 - If you have license only for Agile Vision, unselect the Product Vision check box.
 - If you have license only for Product Vision, unselect the Agile Vision check box.
 - If you have licenses for both Agile Vision and Product Vision, leave both check boxes selected.

Agile Vision and Product Vision are now fully installed.

Configure Agile Vision and Product Vision

After installing, complete the following steps to configure Agile Vision and Product Vision:

1. Log in to Product Vision and click the Setup menu.

The Personal Setup page appears.

2. Select Manage Users from the Administration Setup menu and go to Profiles.

The User Profiles page appears.

3. Click the Name link for a new profile you created when you were preparing to install Agile Vision and Product Vision.

The profile page appears.

- Scroll to the Custom App Settings section and select the Default option for Agile Vision Core.
- 5. Click Save and repeat the steps to set Agile Vision Core as the default app for each new profile you created.
- 6. Enter the following URL in the address bar of your browser window:
 - https://ca-agile.na7.visual.force.com/apex/packagesettings
- 7. Depending on the license that you have purchased, select either Agile Vision or Product Vision.
- 8. Click Save.
- 9. (Agile Vision customers only). Enter the following URL in the address bar of your browser window to go to the Agile Vision Home page and automatically schedule your jobs:

https://ca-agile.na7.visual.force.com/apex/tophome

Configuring Existing profiles to use Agile Vision or Product Vision

To give existing Salesforce.com user profiles access to Agile Vision or Product Vision, edit these profiles to provide appropriate read or write permissions to the Agile Vision or Product Vision objects. The profiles also need permission to execute the Visualforce pages that make up the application. Use the profiles you created at the start of the install process to determine what sets of permissions are needed and copy over the necessary settings.

See the Force.com platform documentation for more information.

How to Set Up Product Vision after an Agile Vision-only Upgrade

This section describes how to make Product Vision fully functional when you are including it with an Agile Vision-only org that has been upgraded. After you purchase the Product Vision license and enable it on the Package Settings page, you must create the following user profiles that are not automatically available for an Agile Vision—only org.

- Product Vision User (see page 12)
- Product Vision Super-User (see page 16)
- <u>Vision User</u> (see page 18)
- <u>Vision Super-User</u> (see page 21)

Best practice: Create the profiles in the order shown.

Create a Product Vision User Profile

To create a Product Vision User Profile

- 1. Open the User Profiles page by completing the following actions:
 - a. Click Setup on the application header.
 - b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

The list page appears.

2. Click New.

The Clone Profile page appears.

3. Complete the following fields:

Existing Profile

Specifies the existing user profile on which you want to base the new profile. Select Standard Platform User.

Profile Name

Indicates the name of the new user profile. Enter Product Vision User.

4. Click Save.

The profile detail page for the new user appears.

5. In the Custom Field-Level subsection of the Field-Level Security section, complete settings for the following items by clicking View to open the item, and then clicking Edit to change the default settings. When the changes for an item are done, click Save, then click Return to Profile.

Product

Visible column. Clear the following check box: Product ID.

Read-Only column. Select the following check boxes: External ID, Jira Project ID.

Release

Visible column. Clear the following check box: Release ID.

Read-Only column. Select the following check box: External ID.

User Story

Visible column. Clear the following check box: Requirement.

Read-Only column. Select the following check box: External ID.

6. At the top of the profile detail page, click Edit.

The edit page appears.

- 7. In the Custom App Settings section, select the Default option for the Agile Vision Core field.
- 8. In the Custom Tab Settings subsection of the Tab Settings section, select Default On for the CA Technologies PPM field.
- 9. Click Save.

The profile detail page appears.

- 10. In the Record Type Settings section of the profile detail page, click the Edit link next to User Stories and complete the following actions:
 - a. Select Master in the Selected Record Types list and click the left (Remove) arrow.
 - b. Select Issue and UserStory in the Available Record Types list and click the right (Add) arrow.
 - c. In the Default field, select User Story.
 - d. Click Save.

The profile detail page appears.

11. At the top of the profile detail page, click Edit.

The edit page appears.



12. In the Custom Object Permissions section, select the check boxes shown in the following illustration.

13. Click Save.

The profile detail page appears.

14. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.

15. Add the following Visualforce pages to the Enabled Visualforce Pages list by selecting them in the Available Visualforce Pages list and using the arrow keys.

Note: The org prefix is not included in the page name in the list.

About ReleaseDetailJs
AcceptanceCriteriaDetail ReleaseEdit

AcceptanceCriteriaEdit RequirementDetail
BasicSelectorDataSource RequirementDetailJs
BlankChartData RequirementEdit
coreJs RequirementMerge

CurrencyFormattingJS RequirementSelectorDataSource

DetailInterior SourceDetail
ExtActionStatusPage SourceDetailJs
FeatureDetail SourceEdit

FeatureDetailJs TestCaseTreeSelectorDataSource

FeatureEdit TopAgilePlannerUser
FilterWindowJs TopAgilePlannerUserJs

ForceUserSelectorDataSource TopFeatures
InLineEditFunction TopFeaturesJs
LicenseError TopHome
ListTemplate TopHomeJs

LoadMaskJs TopPVDashboards

MasterTemplate TopPVHome MasterTemplateJs **TopPersonas** MultiValuedLookupJs **TopProjects** PageBlockCell **TopProjectsJs** PersonaDetail **TopReleases** PersonaDetailJs TopReleasesJs PersonaEdit TopRequirements **PickerJs** TopRequirementsJs

ProductDetailJs TopSources
ProductJs TopThemesJs
ProjectDetail TreeEditorGridJs

ProjectEdit UserSelectorDataSource

ReleaseDetail VelocityChartData

16. Click Save.

Create a Product Vision Super-User Profile

The Product Vision Super-User profile is based on the Product Vision User. The selections made for the Product Vision User are therefore already made for this user. This procedure describes the additional settings required for the super-user.

To create a Product Vision Super-User Profile

- 1. Open the User Profiles page by completing the following actions:
 - a. Click Setup on the application header.
 - b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

The list page appears.

2. Click New.

The Clone Profile page appears.

3. Complete the following fields:

Existing Profile

Specifies the existing user profile on which you want to base the new profile. Select Product Vision User.

Profile Name

Indicates the name of the new user profile. Enter Product Vision Super-User.

4. Click Save.

The profile detail page for the new user appears.

5. Click Edit at the top of the profile detail page.

Custom Object Permissions Data Administration Modify All Acceptance Criteria 7 V V V V Backlog Filters V M [7] V V V V 1 m V V Requirement UseCase J 7 V 150 V V V V V V [7] 277 F1 V V V V 100 Features V V V V E 同 E **F** V Migrations m m m m V V V V V 0 0 V V V V E Team Daily Datas Product Features V 10 Test Cases m 10 m 100 m m Product Sources Test Case Steps 8 8 10 **E**3 Product States 1 Traceability Matrixes [2] B V QC Projects UseCases F [7] m F m 100 User_Story_Release V V 0 V V V 0 m User Notification elease Snapshot Details E 7 V V 8 問 m User Stories V V

6. In the Custom Object Permissions section, make the selections marked in the following illustration.

7. Click Save.

The profile detail page appears.

- 8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.
- 9. Add the following Visualforce pages to the Enabled Visualforce Pages list by selecting them in the Available Visualforce Pages list and using the arrow keys.

Note: The org prefix is not included in the page name in the list.

A gile Planner User Detail

AgilePlannerUserEdit

CategoriesDetail

CategoriesEdit

CategoryDetailJs

Configuration

ProductStateDetail

ProductStateDetailJs

ProductStateEdit

ProductStateList

StateDetail

StateDetailJs

StateEdit

StateList

TestChartComponentPage

TopCategories

10. Click Save.

Create a Vision User Profile

The Vision User profile is based on the Product Vision User. The selections made for the Product Vision User are therefore already made for this user. This procedure describes the additional settings required when you create the Vision User.

To create a Vision User Profile

- 1. Open the User Profiles page by completing the following actions:
 - a. Click Setup on the application header.
 - b. In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

The list page appears.

2. Click New.

The Clone Profile page appears.

3. Complete the following fields:

Existing Profile

Specifies the existing user profile on which you want to base the new profile. Select Product Vision User.

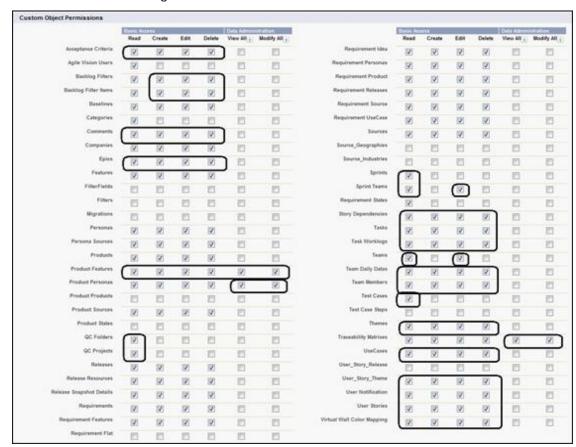
Profile Name

Indicates the name of the new user profile. Enter Vision User.

4. Click Save.

The profile detail page for the new user appears.

5. Click Edit at the top of the profile detail page.



6. In the Custom Object Permissions section, make the selections marked in the following illustration.

7. Click Save.

The profile detail page appears.

8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.

9. Add the following Visualforce pages to the Enabled Visualforce Pages list using the right arrow (Add) key.

Note: The org prefix is not included in the page name in the following list.

AveeUpgrade TeamEdit

BacklogDetail TeamMemberDetail
BacklogDetailJs TeamMemberEdit

BacklogEdit TeamNew
BurndownHoursChartData TestCaseDetail

BurndownPointsChartData TestChartComponentPage

ColorFieldJs ThemeDetail
Configuration ThemeEdit
DeactivateTeamWithFutureSprints TopBacklogList

EpicDetail TopBacklogPlanning
EpicEdit TopBacklogPlanningJs

EpicSelectorDataSource TopCalendar
RowExpanderJs TopDashboardJs
ScrumTeamDetailPage TopDashboards
SprintDetail TopDocumentation

SprintDetail TopEpicList TopEpicList

SprintDetail_UserStories_DS TopEpicPlanning
SprintEdit TopEpicPlanningJs

StoryDependencyDetail TopFeatures
StoryDependencyEdit TopSprintList
StorySelectorDataSource TopSprintsJs

TaskDetail TopTeamMembers
TaskEdit TopTeams
TaskNew TopTeamsJs

TaskWorklogDetail TopThemes
TaskWorklogDetailJs
TaskWorklogEdit

10. Click Save.

TeamAddSprints
TeamDetail

Create a Vision Super-User Profile

The Vision Super-User profile is based on the Vision User profile. The selections made for the Vision Super-User are therefore already made for this user. This procedure describes the additional settings required when you create the Vision Super-User profile.

To create a Vision Super-User Profile

- 1. Open the User Profiles page by completing the following actions:
 - a. Click Setup on the application header.
 - In the Administration Setup section of the left panel, click Manage Users, then click Profiles.

The list page appears.

2. Click New.

The Clone Profile page appears.

3. Complete the following fields:

Existing Profile

Specifies the existing user profile on which you want to base the new profile. Select Vision User.

Profile Name

Indicates the name of the new user profile. Enter Vision Super-User.

4. Click Save.

The profile detail page for the new user appears.

5. Click Edit at the top of the profile detail page.

Custom Object Permissions 100 W (V) V V 4 V V (8) 1 [2] 1 V 100 (2) V (8) V 82 V V 120 V (V) V 80 V (8) V (V) V V 7 V [7] V V V 1 23 D D V W V V) Ð 13 0 V (7) 83 15 B [2] 7 (2) [7] V (4) (2) V D m D (2) (9) V [V] 120 **E**3 W 10 D D 10 E3 10 10 (2) (2) V [2] V 23 D B 15 10 23 1 V V V 1 123 ¥ Ø V V V (2) D 9 [9] V (9) 7 [2] 10 V (2) 7 35 1 12 V 25 D 27 10 10 m [7] (9) (3) 30 191 100 N 12 [2] 7 [2] 10 E [2] [2] . [2] 20 10 10 100 (4) 100 团 (90) 80 [8] (9) [2] 30 121 [2] 10 595 120 8 10 Requirement Flat B 1 10 63 25 8

6. In the Custom Object Permissions section, make the selections marked in the following illustration.

7. Click Save.

The profile detail page appears.

- 8. In the Enabled Visualforce Page Access section of the profile detail page, click Edit.
- 9. Add the following Visualforce pages to the Enabled Visualforce Pages list using the right arrow (Add) key.

Note: The org prefix is not included in the page name in the following list.

AgilePlannerUserDetail

AgilePlannerUserEdit

CategoriesDetail

CategoriesEdit

CategoryDetailJs

Integration

PersonaDetail

PersonaEdit

ProductStateDetail

ProductStateDetailJs

ProductStateEdit

ProductStateList

SprintTeamDetail

 ${\bf Sprint Team Edit}$

StateDetail

StateDetailJs

StateEdit

StateList

TaksDetailJs

TopReports

 ${\bf Top Sprint Planning}$

User Story Comment Detail

User Story Comment Detail Js

UserStoryCommentEdit

10. Click Save.

Chapter 2: Documentation

The following documentation is available for this release of Product Vision:

■ CA Product Vision Getting Started Guide

This guide can help you get started with Product Vision as a new user. The guide takes you through setting up and managing your projects in Product Vision. A link to the guide is provided in two places in Product Vision so that it is always available to you:

On the Requirements list page.

This is the page you see when you select Requirements from the Product Vision menu. When you create the first requirement in Product Vision, the link is replaced by the list of requirements.

- On the About page for Product Vision.
- Context sensitive Online Help

For this release, the context sensitive help for pages that are common between Agile Vision and Product Vision comes from the Agile Vision help. The information that appears in the common topics is appropriate for both products, however the navigation presented in the procedures pertains only to Agile Vision.

The entire set of Product Vision guides is available from <u>CA Support</u> and can be accessed from the Product Vision bookshelf. With this bookshelf, you can view a specific guide or search the entire bookshelf for related information. You can view an HTML version of these guides, download a PDF, or download a .zip of the entire bookshelf.

You can access the bookshelf from the product support page or from the documentation page. Visit <u>CA Support</u> periodically for the latest editions of Product Vision guides.

Chapter 3: Additional Information

This section contains the following topics:

<u>Restrictions on Use of the force.com Platform</u> (see page 27) <u>Contract Termination</u> (see page 27)

Restrictions on Use of the force.com Platform

Customers may not create separate applications on the force.com platform without prior written approval of Salesforce.com, and then only under terms and conditions mutually agreed-upon by the Customer and Salesforce.com.

The Customer may customize or extend Product Vision using additional custom objects.

Contract Termination

Data Retention

Salesforce.com provides an API for customers to retrieve their data for any purpose, including backup or migration.

After termination of a CA Customer's Service Order with CA, the customer has a 30 day grace period in which to contact CA to request that their data be exported.

Salesforce.com has no obligation to retain Customer Data following thirty days after termination of a CA Customer's Service Order with CA. Any requests for return of Customer Data are handled solely by CA.

Chapter 4: Known Issues

The following are known issues in CA Product Vision:

Tip Text on the Requirements Hierarchy Page

For customers using Internet Explorer 7, tip text does not display for drag-and-drop operations on the requirements list that displays when Requirements Hierarchy is selected as a View option. The same behavior is seen on the requirements list that appears on the Product Detail page.

Deletion of a product from the Product list page

A user who is listed as an additional owner of a product (not the creator) cannot delete the product from the Product list page. This owner type can only delete the product from the Product Detail page. A user must have a force.com Super User profile to in order to delete.

Deletion of sources and personas

A user cannot delete a source or persona created by other users. Only the creator or the Super User can delete a source or persona. A user must have a force.com Super User profile to in order to delete.

View selector in Internet Explorer 7

The View selector on the Traceability Matrix page for requirements does not show up completely for users with Internet Explorer 7.

Autosuggest for Product field

When you create a new requirement, the Product field, which is an autosuggest field, does not display all products for selection when you press the space bar. To display products for selection, press the Backspace button.

Message

The message "The requirement cannot be marked as inactive because it has child requirements" also displays for a period of time in the Requirements section after you deactivate a parent requirement that has a child requirement.

Page size and item number on the Traceability view

On the Traceability Matrix view for requirements, the number of items shown on each page is not consistent.

Page number and item number on the Feature Hierarchy view

On the Feature Hierarchy view available from the Features list page, the page number and number of items do not display correctly after you switch between the last viewed and the previous pages several times.

Working icon only displays on half the page

On the Product Detail page, when you create a new child requirement, the Working icon only covers half the page if you are using Internet Explorer 8.

Creator cannot be removed

The creator of a feature, product, or requirement cannot be removed. The creator always has permission to edit or delete.

Error message

When a user is added to a feature, product, or requirement as an additional owner, the user has the right to delete his or her name as an owner. When the deletion occurs, the error message "Data not available" appears. This message is not clear.

Save on filter dialog

When you click Save, the Working icon shadow does not cover the entire dialog.

Release calendars are different

The calendars that appear for selecting release dates are different in appearance on a new release and a release that is being edited.

Requirement Hierarchy page

When the last line on the page is reached, the right-click on the row to bring up the pop-up menu does not work. It flashes but does not remain on screen for a selection to be made.

Requirements list pages

The tool tips for individual rows incorrectly display the requirement title value and not the requirement ID.

Globalization Issues with User Interface

For some languages, platform incompatibility caused translation inconsistencies on a few pages, buttons, field labels, and other elements on the user interface. For example, the translated user interface may display English text or truncated text.