

# CA Product Vision™

## User Guide

Winter 2011



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# Contents

---

## Chapter 1: Introduction 9

About CA Product Vision .....	9
Key Product Vision Terms .....	9
Quick Tour .....	11
Product Vision Menu .....	11
Administration Menu .....	12
Page Filters .....	12
Navigation Links .....	14
Required Fields .....	15
Auto Suggest for Lookups .....	15
Sort List Page Information .....	15
List Display and Pagination .....	16
List Page Actions .....	16
Editing List Page Fields .....	18
Editing Rules .....	19

## Chapter 2: Business Planning 21

About Business Planning .....	21
By Example: Create a Persona and a Source .....	21
About Sources .....	22
Create a Source .....	22
Edit Source Details .....	23
View a Source .....	25
About Personas .....	25
Create a Persona .....	25
Edit Persona Details .....	26
View Persona Details .....	27

## Chapter 3: Product Setup 29

About Products .....	29
Create a Product .....	29
Edit Product Details .....	30
View Product Details .....	32
Change the Product Owner .....	32
How to Define a Competing Product .....	32
Create a Release or Requirement for a Product .....	33

---

About Releases .....	33
Create a Release .....	33
Edit Release Details .....	34
View Release Details .....	35
Add a Feature to a Release .....	35
Set a Baseline for a Release .....	36
Compare Release Baselines .....	36
About Features .....	37
Create a Feature .....	37
Edit Feature Details .....	37
View Feature Details .....	38
Add a Note to a Feature .....	38
Add an Attachment to a Feature .....	39
View the Feature Hierarchy .....	39

## **Chapter 4: Managing Requirements 41**

About Requirements .....	41
By Example: Plan Feature Requirements Over Releases .....	42
Create a Requirement .....	42
Edit Requirement Details .....	44
View Requirement Details .....	46
Requirement Hierarchies .....	46
By Example: Define Requirements in a Hierarchy .....	46
Create a Child Requirement .....	47
Edit Child Requirement Details .....	48
Assign a Requirement to a Release .....	50
Assign a Requirement to a Feature .....	50
Create a Requirement for a Product, Release, or Feature .....	51
Create a Requirement for a Source .....	51
Link Existing Requirements with a Product .....	51
Merge Requirements .....	52
Delete a Requirement .....	53
Delete a Requirement from Product Vision .....	53
Delete a Requirement from a Product, Release, or Feature .....	54
View and Manage Requirements Lists .....	54
View the Traceability Matrix .....	54
View the Requirements Hierarchy .....	55
Attach a Note to a Requirement .....	55
Add an Attachment to a Requirement .....	56

---

## **Chapter 5: Using Product Vision with Agile Vision** **57**

About Using Product Vision with Agile Vision .....	57
Create a Sprint .....	57
Create a Team .....	59
Add a Member to a Team .....	60
User Stories .....	62
Create a User Story for a Requirement .....	63
Edit User Story Details .....	65
Link a User Story to a Requirement .....	67
Create a User Story Task .....	67
Add a Note to a User Story .....	69
Add an Attachment to a User Story .....	69
Add a Comment to a User Story .....	70
Link an Issue with a User Story .....	70
By Example: Connect Traditional Requirements to Agile Development .....	70

## **Chapter 6: Using Product Vision with Idea Vision** **73**

About Using Product Vision with Idea Vision .....	73
Link a Product to an Idea .....	73
Link a Requirement to an Idea .....	74

## **Chapter 7: Product Vision Access Rights** **75**

## **Appendix A: Third-Party Acknowledgements** **77**

Ext JS - JavaScript Library .....	77
JSON 1.0 .....	78
jquery 1.3.2 .....	79





# Chapter 1: Introduction

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This section contains the following topics:

[About CA Product Vision](#) (see page 9)

[Key Product Vision Terms](#) (see page 9)

[Quick Tour](#) (see page 11)

[Editing Rules](#) (see page 19)

## 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.

## Quick Tour

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

[Product Vision Menu](#) (see page 11)

[Administration Menu](#) (see page 12)

[Page Filters](#) (see page 12)

[Navigation Links](#) (see page 14)

[Required Fields](#) (see page 15)

[Auto Suggest for Lookups](#) (see page 15)

[Sort List Page Information](#) (see page 15)

[List Display and Pagination](#) (see page 16)

[List Page Actions](#) (see page 16)

[Editable List Page Fields](#) (see page 18)

## 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

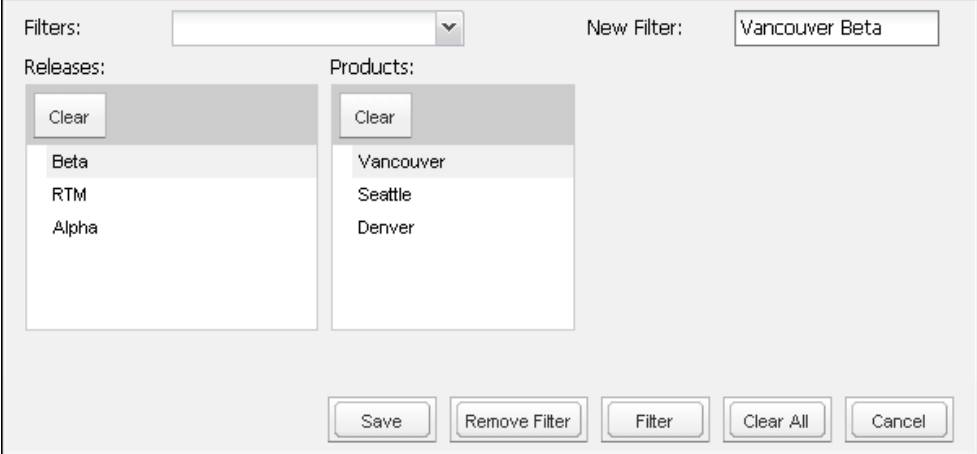
Some list pages have a filter below the header that lets you control what you view on the page. For example, you can filter the Features list page to view the listed items by product and release.

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.



The screenshot shows a filter dialog box with the following elements:

- Filters:** A dropdown menu.
- New Filter:** A text input field containing "Vancouver Beta".
- Releases:** A list box with a "Clear" button above it. The list contains "Beta", "RTM", and "Alpha".
- Products:** A list box with a "Clear" button above it. The list contains "Vancouver", "Seattle", and "Denver".
- Buttons:** "Save", "Remove Filter", "Filter", "Clear All", and "Cancel" are located at the bottom of the dialog.

#### 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

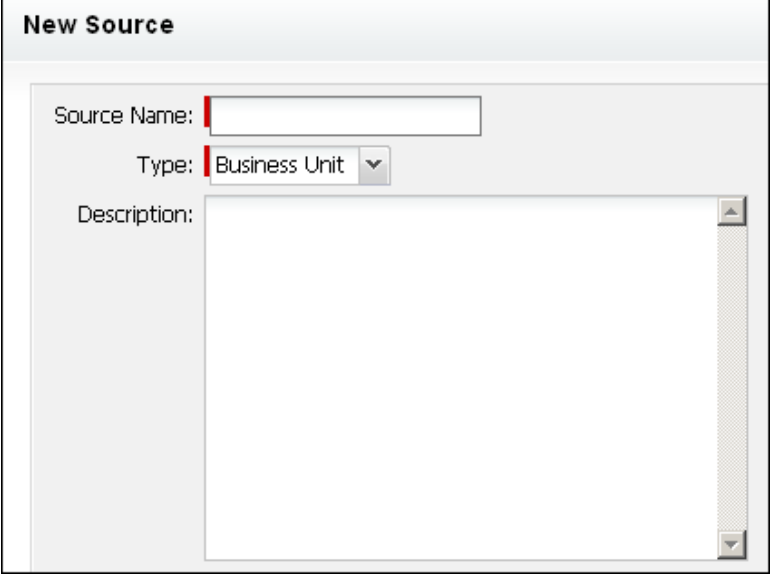
Users can navigate to most pages from almost every Product Vision page. On list pages, the action items Edit or View appear in an Action column. Clicking Edit navigates to the edit page for the product or component being viewed. Clicking View navigates to its detail page. If you are the creator of a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



The screenshot shows a form titled "New Source". It contains three input fields: "Source Name:" (a text box with a red border on the left), "Type:" (a dropdown menu with "Business Unit" selected and a red border on the left), and "Description:" (a large text area with a scroll bar). The "Source Name" and "Type" fields are highlighted as required.

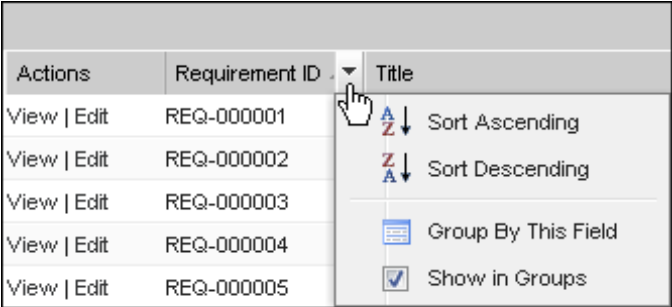
You cannot save changes on the page unless these fields contain valid data.

## 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.



The screenshot shows a table with five rows of data. The columns are "Actions", "Requirement ID", and "Title". A dropdown menu is open over the "Requirement ID" column, showing options for sorting and grouping.

Actions	Requirement ID	Title
View   Edit	REQ-000001	
View   Edit	REQ-000002	
View   Edit	REQ-000003	
View   Edit	REQ-000004	
View   Edit	REQ-000005	

Dropdown menu options:

- Sort Ascending
- Sort Descending
- Group By This Field
- Show in Groups

**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.

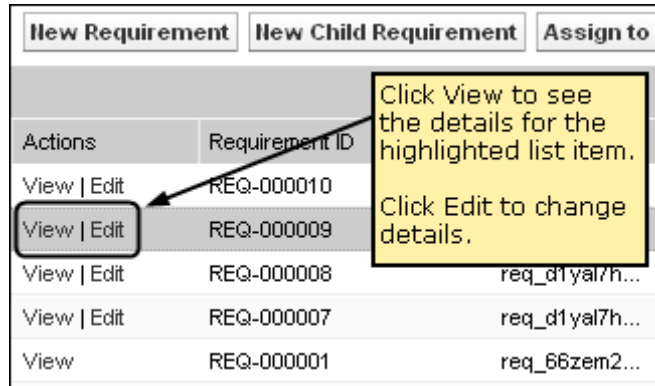
To display a component's list page, click the link in the Product Vision menu for the component.

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.

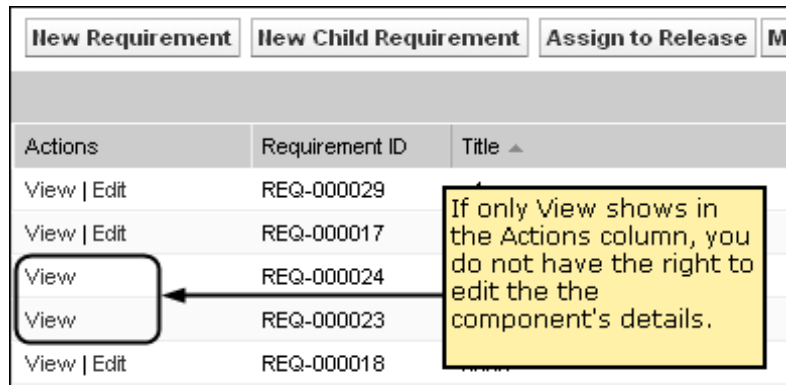


- View. You can open the detail page in view-only mode. If you decide to make changes, you can click the Edit button to change to edit mode if you are the creator of the component or the product owner of a product associated with the component.



**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

<b>View mode action</b>	<b>Product owner or creator can perform?</b>	<b>User who is not a product owner or creator can perform?</b>
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: Business Planning

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This section contains the following topics:

[About Business Planning](#) (see page 21)

[By Example: Create a Persona and a Source](#) (see page 21)

[About Sources](#) (see page 22)

[About Personas](#) (see page 25)

## About Business Planning

Business planning for Product Vision is about identifying who your customers are so that you can understand their business needs and the requirements they are interested in. The Business Planning menu contains options that let you identify and provide information about personas and sources. By associating a requirement with a source or a persona, you save important information about who requested the requirement and why they need it.

## By Example: Create a Persona and a Source

John Wheeler is a Net Worth product manager for Forward, Inc. He is responsible for helping ensure that the release and feature requirements for his product satisfies the needs of his customers.

John receives market research that describes a typical buyer of a new product that he is planning. In addition, John learns from a Forward, Inc. sales representative through an email that a current customer, Miki Wireless Devices, has expressed interest in the planned product and has requested some requirements that would help ensure a new sale to the customer.

To help ensure that the information he has received on his new product is not lost, John completes the following tasks in Product Vision:

- To capture the market research information about the typical buyer, John creates a persona for the buyer and names the persona *Charlie Smith*. John indicates that the persona is the chief technical officer in a telecom hardware company. To complete the persona, John adds additional information from the market research about product needs, pain points, and buying habits.
- To capture the information from the current customer, John creates a source of type *Customer* for the company Miki Wireless Devices. Because the company is based in Japan, John selects the Geo Segment *Japan*. He completes the remaining information for the source, including information about who to contact in the company.

John creates the requirements Miki Wireless Devices has requested in the new product. As he creates the requirements in Product Vision, he selects the source Miki Wireless Devices to link the requirements to the requestor. The new requirements can now be traced back to Miki Wireless Devices as they go through the development cycle.

Because the requirements also fit the needs of the Charlie Smith persona's profile, John associates the requirements with that persona. Because he associated the source and persona, John can quickly look at the requirements and see which markets, customers, and personas value the requirements. This information can be invaluable if changes in the scope of the product require decisions on which requirements are included and which are left out of scope.

## 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](#) (see page 51)

## 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 3: Product Setup

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This section contains the following topics:

[About Products](#) (see page 29)

[About Releases](#) (see page 33)

[About Features](#) (see page 37)

## 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](#) (see page 32)
- [Create a release or requirement](#) (see page 33)
- [Create a scrum team](#) (see page 59)

## Change the Product Owner

When you create a product, you are the owner of the product by default. You can however, change the ownership of the product to another user or add additional owners. The new owner gains the right to make changes to the product details.

Only a current owner or the creator of a product can make changes to a product's details.

### To change the product owner

1. Open the products list and click View in the Actions column on the product's row.
2. Click Change next to the Owner field.

A page appears for selecting a new owner.

## How to Define a Competing Product

You define a competing product in the same way you define a product for your company. When a product is marked as a competitor, it becomes available for selection as a competitor you can associate with one of your company's products.

The following process indicates how to create a competing product definition.

1. [Create the product](#) (see page 29).
2. [Edit the product details](#) (see page 30).

Make sure the Competitor check box on the product's *Product Edit* page is selected.



## Create a Release or Requirement for a Product

You can create a release or a requirement from the Product Details page. The release or requirement is automatically associated with the product.

### To create a release or requirement for a product

1. Open the details page for the product.

To do this, open the Products page and click View in the Actions column of the product.

The details page appears.

2. Do one of the following:
  - Click New Requirement in the Requirements section.
  - Click New Release in the Releases section.

## 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](#) (see page 35)
- [Create a requirement](#) (see page 51)
- [Create a sprint](#) (see page 57)
- [Create a baseline](#) (see page 36)

## Add a Feature to a Release

This procedure describes how to open a release and create a new feature from the release's detail page. This is a quick way to associate a new feature with a release.

The feature you create displays on:

- The list of features on the release's detail page
- The features list page available from the Detailed Planning menu

**To add a feature to a release**

1. Open the releases list page and click View in the Action column on the release's row.

The release's detail page appears.

2. In the Features section, click New Feature.

The feature edit page appears.

3. Complete the following fields:

**Feature Name**

Specifies the name of the feature.

**Product**

Specifies the product with which the feature is associated.

**Release**

Specifies the release or releases with which a feature is associated. You can associate a feature with more than one release.

**Description**

Provides a description of the item being created or edited.

4. Click Save.

## Set a Baseline for a Release

A baseline is a snapshot of requirements for a release at a specific point in time. Baselines are static, and changes you make after the baseline is created do not automatically appear in the current baseline.

You can create a second baseline to include newly entered or changed requirements.

**To create a release baseline**

1. Open the releases list page and click View in the Actions column on the release's row.  
The release's detail page appears.
2. In the Baseline section, click New Baseline.

## Compare Release Baselines

If you have multiple baselines for requirements for a release, you can do a comparison of two baselines.

**To compare release baselines**

1. Open the releases list page and click View in the Action column on the release's row.  
The release's detail page appears.
2. In the Requirements section, highlight the two baselines you want to compare, and click Compare 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](#) (see page 51)
- [Add a note to a feature](#) (see page 38)
- [Add an attachment to a feature](#) (see page 39)

## Add a Note to a Feature

**To attach a note to a feature**

1. Open the features list page and click View in the Actions column of the feature.  
The detail page appears.
2. In the Notes & Attachments section, click New Note.
3. Complete the following fields:

**Private**

Specifies when selected that the note can be viewed or edited only by the creator.

**Default:** Cleared

**Title**

Specifies the name of the note.

### **Body**

Specifies content of the note.

4. Click Save

## **Add an Attachment to a Feature**

### **To add an attachment to a feature**

1. Open the features list page and click View in the Actions column of the feature.  
The detail page appears.
2. In the Notes & Attachments section, click Attach File.
3. Follow the instructions on the page that appears to attach a file.

## **View the Feature Hierarchy**

You can view the requirements that belong to each feature in the Feature Hierarchy view.

### **To display the Feature Hierarchy**

1. Open the features list page.
2. In the View field at the top of the list page, select Feature Hierarchy.  
The list of features displays. Each feature that has requirements associated appears with a triangle to the left of the feature name in the list.
3. Click a triangle in the list to display the requirements associated with the feature.





# Chapter 4: Managing Requirements

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This section contains the following topics:

[About Requirements](#) (see page 41)

[By Example: Plan Feature Requirements Over Releases](#) (see page 42)

[Create a Requirement](#) (see page 42)

[Edit Requirement Details](#) (see page 44)

[View Requirement Details](#) (see page 46)

[Requirement Hierarchies](#) (see page 46)

[Assign a Requirement to a Release](#) (see page 50)

[Assign a Requirement to a Feature](#) (see page 50)

[Create a Requirement for a Product, Release, or Feature](#) (see page 51)

[Create a Requirement for a Source](#) (see page 51)

[Link Existing Requirements with a Product](#) (see page 51)

[Merge Requirements](#) (see page 52)

[Delete a Requirement](#) (see page 53)

[View and Manage Requirements Lists](#) (see page 54)

[Attach a Note to a Requirement](#) (see page 55)

[Add an Attachment to a Requirement](#) (see page 56)

## 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.

## By Example: Plan Feature Requirements Over Releases

Mark Wilson is the product owner for an existing Forward, Inc. flagship product. Mark's product is a mature software application that is healthy and currently produces a strong revenue stream. However, the product is in need of a revision to keep up with recent advances by competitors.

Mark has a list of requirements that have been entered into Product Vision by sales, support, and marketing. It is Mark's job to manage the requirements over a number of releases in the next fiscal year. To manage the requirements using Product Vision, Mark does the following:

- Determines the product features to be implemented and creates the features in Product Vision.

Mark does this by examining the current requirements and determining what is to be done and the order. Some requirements can be grouped into one feature. Mark determines that six product features are required (Features A, B, C, D, E and F). He also determines that all of the requirements for one feature (Feature A) cannot be done in one release but will have to be spread across multiple releases.

- Determines the number of releases required and creates the releases in Product Vision.

Mark determines that three releases are required to implement the features and requirements he has listed. The releases are Spring 2011, Summer 2011, and Winter 2011.

- Assigns requirements to the features.

Mark assigns 72 requirements to the six features from the requirements list view.

- Assigns the requirements of Feature A across multiple releases.

Mark assigns the following requirements from Feature A to the individual releases: Five to the Spring 2011 release, seven to the Summer 2011 release, and three to the Winter 2011 release. This can be done from the requirements list page by highlighting the requirements and clicking Assign to Release.

## 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](#) (see page 47)
- [Add a user story \(if used with CA Agile Vision\)](#) (see page 63)
- [Add a note](#) (see page 55)
- [Add an attachment](#) (see page 56)

## Requirement Hierarchies

You can break a requirement into smaller child requirements that suit your business needs. You can create a hierarchy of requirements with parents, children, and grandchildren. There is no limit to the number of levels you can create in a hierarchy.

You can see the results of a creating a hierarchy by viewing the Requirements Hierarchy page. This page is available by clicking Requirements in the Detail Planning menu, then selecting Requirements Hierarchy in the View field.

### By Example: Define Requirements in a Hierarchy

Carol Martinez is a business analyst for Forward, Inc. She captures a set of high-level business requirements from Marketing regarding a business analytics system. Carol enters the high-level requirements in Product Vision, where they are displayed in the list view.

The high-level requirements from Marketing are not broken into manageable work units that the IT department can use to make system modifications. Carol must break the high-level requirements into smaller child requirements that describe the specific features and changes needed in the current system.

Carol selects a category type of Business Requirement for the high-level requirements, and for the child requirements under each high-level requirement, she selects the category of Technical Requirements. The requirement categories were set up by her system administrator and are specific to Forward, Inc. By selecting different categories for the parent and children, Carol can sort the requirements on the list page by category, or print the requirements separately by category.

Each of the requirements is also associated with Forward, Inc. Marketing as the source. Marketing personnel can then view the requirements from the Marketing source and check that the requirements are being fulfilled.

Carol finds that she needs multiple levels to completely break down the high-level requirements into basic requirements. To do this, she creates children under the appropriate child requirements until she has reached the basic requirement level. The final result of Carol's deconstruction of the high-level requirements into child requirements is a requirement tree with five levels of child requirements. Once Carol's deconstruction is complete, the IT department assesses whether the requirements can be accomplished using the current system or whether an RFP process to bring in a new system is necessary.

## Create a Child Requirement

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

### To create a child requirement

1. Display the requirements list, highlight the requirement that is to be the parent and click New Child Requirement.
2. 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

**Parent Requirement**

Specifies the parent requirement of the child requirement.

**Product**

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

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

## Edit Child Requirement Details

**To edit or add child requirement details**

1. Open the requirements list page and click Edit in the Actions column of the child 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.

**Sources**

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

**Requirement Owner**

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

**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.

## Assign a Requirement to a Release

This procedure explains how to assign a requirement from the Requirements list page.

**To associate a requirement**

1. Open the requirements list page, then highlight the requirement or requirements you want to assign and click Assign to Release.

A releases selection window appears showing the associated releases for the product or products associated with the requirement.

2. Select the appropriate release or releases to assign and click Add.

The requirements are added to the selected releases. To verify, open one of the selected releases in View mode and check the Requirements section.

## Assign a Requirement to a Feature

This procedure explains how to assign a requirement from the Requirements list page to a feature. You can only assign a requirement to one feature per product.

**To associate a requirement to a feature**

1. Open the requirements list page, then highlight the requirement or requirements you want to assign and click Assign to Feature.

A features selection window appears showing the associated feature for the product or products associated with the requirement.

2. Select the appropriate feature or features to assign and click Add.

The requirements are added to the selected features. To verify, open one of the selected features in View mode and check the Requirements section.

## Create a Requirement for a Product, Release, or Feature

You can create a requirement or a child requirement from a Product Details, Release Detail, or Feature Detail page.

### To create a requirement

1. Open the Product Details, Release Detail, or Feature Detail page.  
To do this, click Products, Releases or Features on the Detailed Planning menu.  
The list page appears.
2. Click View for the specific product, release or feature.  
The details page appears.
3. Scroll to the Requirements section and click New or New Child.

## Create a Requirement for a Source

You can create a requirement or a child requirement from the Source Details page. Any requirement you create from this page is automatically associated with the source.

### To create a requirement from the Source Detail page

1. Open the Source Details page.  
To do this, click Source under Business Planning in the Product Vision menu.  
The list page appears.
2. Click View for the source in the list you want.  
The details page appears.
3. Scroll to the Requirements section and click New or New Child.

## Link Existing Requirements with a Product

You can link (associate) existing requirements with a product.

### To link a requirement with a product

1. Open the products list page, and click View in the Actions column of the product.  
The details page appears.
2. In the Requirements section, click Link Requirements.  
A list of available requirements appears.
3. Select the requirements you want to link to the product and click Add.

## Merge Requirements

You can merge two or more requirements into a single requirement. When you merge requirements, you must select one of the requirements as the master. The remaining merged requirements become inactive children requirements that are listed only on the master requirements page.

**Important!** Once you merge requirements, this action cannot be undone.

The following rules apply for merging requirements:

- The information in list boxes for the parent and children appears in the master's requirements detail page:
  - Products
  - Product Owner
  - Releases
  - Personas
  - Sources
  - Features
- The following fields are not merged, but the information remains specific to the individual requirements, whether they are parent or child:
  - Requirement ID
  - Labor Estimate
  - Cost Estimate
  - Complexity
  - Priority
  - Type
  - Title
  - Financial Benefits
  - Theme
  - Confidence Level
  - Category
  - State

- Is Active

**Note:** You can open and view the inactive children requirements that appear on the master requirement's detail page.

#### To merge requirements

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

The requirements hierarchy page appears.

2. Highlight the requirements you want to merge and click Merge.

The merge page appears with the selected requirements listed.

3. Highlight the requirement that is to be the master requirement and click Merge.

The detail page of the parent appears with the merged requirements listed as child requirements.

## Delete a Requirement

You can delete requirements in the following ways:

- Deleting a requirement from the Requirements list page, deletes the requirement from Product Vision no matter how many associations the requirement has with components.
- Deleting a requirement from a product, release, or feature does not remove the requirement from Product Vision.
- If the product is the last product association for the requirement, you cannot delete the requirement from the product.
- Deleting a requirement from a release or feature does not delete the requirement from the associated product.

### Delete a Requirement from Product Vision

#### To delete a requirement from Product Vision

1. Open the requirements list page.
2. Highlight the requirement or requirements you want to delete and click Delete.

## Delete a Requirement from a Product, Release, or Feature

### To delete a requirement from a product, release, or feature

1. Go to the Product Vision menu, and click the component from which you want to delete a requirement (Products, Releases, or Features) from the Detailed Planning menu.

The list page appears.

2. Locate the specific component in the list and click View.

The detail page appears.

3. In the Requirements section, find the requirement you want to delete and click Del in the column next to the requirement.
4. Click Save.

## 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.

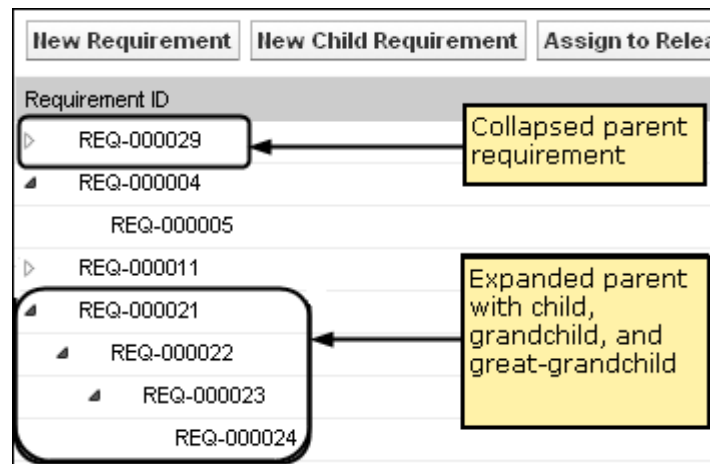
### To view the Requirements Hierarchy

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.



## Attach a Note to a Requirement

### To attach a note to a requirement

1. Open the requirements list page, then locate the requirement in the list and click View in the Actions column.  
The detail page appears.
2. In the Notes & Attachments section, click New Note.

3. Complete the following fields:

**Private**

Specifies when selected that the note can be viewed or edited only by the creator.

**Default:** Cleared

**Title**

Specifies the name of the note.

**Body**

Specifies content of the note.

4. Click Save.

## Add an Attachment to a Requirement

**To add an attachment to a requirement**

1. Open the requirements list page, then locate the requirement in the list and click View in the Actions column.  
The detail page appears.
2. In the Notes & Attachments section, click Attach File.
3. Follow the instructions on the page that appears to attach a file.



# Chapter 5: Using Product Vision with Agile Vision

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This section contains the following topics:

[About Using Product Vision with Agile Vision](#) (see page 57)

[Create a Sprint](#) (see page 57)

[Create a Team](#) (see page 59)

[User Stories](#) (see page 62)

[By Example: Connect Traditional Requirements to Agile Development](#) (see page 70)

## About Using Product Vision with Agile Vision

If you are using Agile Vision with Product Vision, you can complete the following Agile Vision tasks while working in Product Vision:

- Create a sprint

When you create a sprint and define the necessary fields to save the sprint in Product Vision, the sprint detail opens in Agile Vision so that you complete user stories.

- Create a team

You can create a scrum team for a product, indicating the name, the expected team velocity, the story point scale, meeting time and location, and other information. If you create a new team in Product Vision, you can open Agile Vision and go to the Teams list page and find the team.

- Create a user story

From the requirements detail page for a specific requirement, you can create a user story for a requirement, and you can link existing user stories to the requirement.

- Create a Task

You can create tasks for an Agile Vision user story.

## Create a Sprint

You can create a sprint from the Product Vision Release Detail page for a specific release.

**To create a new sprint**

1. Open the releases list page.

2. Select the release and click View.  
The Release Detail page appears.
3. In the Sprints section, click New Sprint.  
The Sprint Edit page appears.
4. 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

**Retrospective**

Specifies any information you want recorded from the sprint retrospective.

5. Click Save.

The Sprint Detail page appears.

## Create a Team

You can create a scrum team in Product Vision for a product. The team is created on the Details Page of the product for which it will do tasks. As you create the team, the information is shared with Agile Vision and the team appears in that product's team listings.

**To create a new scrum team**

1. Display the product list page, then select the product you want to create a team for and click View.

The Product Details page appears.

2. In the Teams section, click New Team.
3. Complete the following fields:

**Team Name**

Specifies the name of the scrum team.

**Required:** Yes

**Limits:** 80 characters

**Active**

Specifies whether the team is active. Inactive teams are not presented as options in the filters through Agile Vision.

**Default:** Active

**Expected Velocity**

Defines the estimated total story points that a scrum team believes they can realistically complete during a sprint. The velocity displays as team capacity in the sprint backlog.

This value becomes the default velocity for the team for each new sprint that they are assigned to. You can modify this value as needed by editing the sprint team on the Sprint Detail page.

### **Story Point Scale**

Defines the story point scale your team uses. Enter a comma-separated list of numbers.

**Default:** Fibonacci sequence 1 through 21

### **Product**

Specifies the unique name of the product.

**Required:** Yes

### **Scrum Meeting Time/Location**

Specifies the time and location for daily scrum meetings.

### **Hours per Day**

Defines the base or standard number of hours per day that all team members spend actively working for the team. This value is used in the burndown calculations.

### **Scrum Team Domain**

Specifies the Domain name or URL for the team.

4. Click Save.

## **Add a Member to a Team**

### **To add a member to a scrum team**

1. Display the product list page, then select the product and click View.  
The Product Details page appears.
2. In the Teams section, click the name of the team to display the Team Detail page.
3. In the Team Members section, click New Scrum Team Member.  
The Team Member Edit page appears.
4. Complete the following fields:
5. Edit the following fields.

### **Member Name**

Specifies the user you want to add to the scrum team. The user names in the list are Salesforce.com users that have already been added as users.

### **Active**

Specifies whether the team member is an active part of the team.

**Default:** Active

### Allocation (%)

Specifies the percentage of time the member will be allocated to this team or product. If no value is specified, the team member is not considered in the team allocation charts.

**Default:** 0%

### Team

Specifies the name of the scrum team to which the member is being added.

**Default:** The current scrum team

**Required:** Yes

### Role

Specifies the member's role on the team.

**Values:**

- Member
- Scrum Master
- Product Owner

### Team Member Notes

Specifies additional relevant information about the team member.

**Limits:** 255 characters

6. Do one of the following:
  - To add the user to the team, click Save.  
The team member is added and you return to the Scrum Team Detail page.
  - To add the user to the team and choose another user to add to the team, click Save and New.  
The Scrum Team Member Edit page appears.

## User Stories

When you create a user story for a requirement in Product Vision, the two are linked.

The following statements apply to user stories created in Product Vision:

- The user story must be associated with the same product, release, and sprint as the requirement.
- User stories created in Product Vision are included in Agile Vision and can be viewed and edited from that product.
- To view requirements and their associated user stories, open the Traceability Matrix or the Requirement Hierarchy.

The following illustration shows parent and child requirements with their associated user stories in the Traceability Matrix. Requirements are defined by levels to indicate parent-child relationships, and user stories are defined in similar way so that the user story is shown in the same level as its associated requirement.

View: Traceability Matrix <span>Current Filter: No Saved Filter</span>			
Requirement Level 1	Requirement Level 2	User Story Level 1	User Story Level 2
Requirement A		User Story A	
	Child Requirement A		User Story Child A

You can click the requirement name or the user story name in the Traceability Matrix to see details.

---

## Create a User Story for a Requirement

A user story must be associated with the same product, release, and sprint as the requirement. Once the user story is created, to complete full information about the user story, edit the user story details.

### To create a user story

1. Open the requirements list page.
2. Select the requirement you for which you want to create a user story and click View.

The Requirement Details page appears.

3. In the User Stories section, click New User Story.
4. Complete the following fields:

#### Title

Specifies the name of the user story.

**Required:** Yes

**Limits:** 255 characters

**Example:** Many Agile teams use the format: "As a \_\_\_ I want to \_\_\_ so that \_\_\_". For example, "As a user, I want to see home page when I log in so that I can view my current tasks". Follow your organization's convention.

#### Points

Defines the number of points estimated to complete the user story. Point values must be expressed as integers. Decimals are not allowed.

#### Status

Specifies the user story's current status.

##### Values

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

#### Priority

Specifies the user story's importance in the product.

##### Values:

- Very High
- High

- Medium
- Low
- Very Low

**Default:** Medium

### **Description**

Defines the purpose of the user story and provides additional relevant information.

### **Product**

Specifies the name of the product with which the user story is associated.

### **Release**

Specifies the release with which the user story is associated.

### **Sprint**

Specifies the sprint in which the user story is completed.

5. Click Save and Close.
6. Complete the full information for the user story by editing user story details.



---

## Edit User Story Details

To complete information for a user story in Product Vision, open the user story in View mode and then edit.

### To edit user story details

1. Open the requirements list page, then select the requirement for which you want to edit user story details and click View.

The Requirement Details page appears.

2. In the User Stories section, click View next to the name of the user story.

The User Story Detail page appears.

3. Click Edit.

4. Edit or complete the following fields:

#### Title

Specifies the name of the user story.

**Required:** Yes

**Limits:** 255 characters

**Example:** Many Agile teams use the format: "As a \_\_\_ I want to \_\_\_ so that \_\_\_". For example, "As a user, I want to see home page when I log in so that I can view my current tasks". Follow your organization's convention.

#### Points

Defines the number of points estimated to complete the user story. Point values must be expressed as integers. Decimals are not allowed.

#### Assignee

Specifies the team member who owns the user story.

**Note:** You can assign the user story to an [set to your product name] user who is not a member of the scrum team that owns the story.

**Example:** A member of another team is needed to do code review.

#### Epic

Defines this user story as the child of an existing epic. You can move a user story from one epic to another from the edit page of the user story.

**Status**

Specifies the user story's current status.

**Values**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

**Priority**

Specifies the user story's importance in the product.

**Values:**

- Very High
- High
- Medium
- Low
- Very Low

**Default:** Medium

**Description**

Defines the purpose of the user story and provides additional relevant information.

5. Complete the following fields in the Product Information section:

**Product**

Specifies the name of the product with which the user story is associated.

**Sprint**

Specifies the sprint in which the user story is completed.

**Theme**

Specifies the Agile Vision theme that is to be used for the user story.

**Release**

Specifies the release with which the user story is associated.

**Team**

Specifies the scrum team that will complete the user story.

**Requirement**

Specifies a requirement associated with the user story.

6. Click Save.

## Link a User Story to a Requirement

A requirement can be linked to more than one user story. You can create a user story for a requirement or you can link (associate) a requirement with an existing user story.

**To link a user story to a requirement**

1. Open the requirements list page and click View in the Actions column on the requirement's row.  
The details page appears.
2. In the User Stories section, click Link User Story.
3. Select the requirement you want to link to and click Save.

## Create a User Story Task

Generally, a user story is broken down into one or more tasks. Tasks are items of work that one or more team members perform during a sprint.

**To create a task for a user story**

1. Open the requirements list page, then select the requirement for which you want to edit user story details and click View.  
The Requirement Details page appears.
2. In the User Stories section, click View next to the name of the user story.  
The User Story Detail page appears.
3. In the Tasks section, click New Task.
4. Complete the following fields:

**Task Title**

Defines the name of the task.

**Required:** Yes

### **Type**

Defines the type of task.

#### **Values:**

- Implementation
- QA
- Doc
- Design
- Other

**Default:** None

### **Estimated Hours**

Defines the number of hours estimated to complete the task. This includes any hours already logged.

### **Assignee**

Specifies the team member responsible for completing the task.

**Default:** The assignee for the user story, if specified.

### **Status**

Specifies the current state of the task.

#### **Values:**

- Planned
- In Progress
- Completed
- Closed

**Default:** Planned

### **Team**

Specifies the team assigned to the task.

**Default:** The team assigned to the user story, if specified.

### **Description**

Specifies a full description of the task and any additional information needed to complete the task.

5. Click Save.

## Add a Note to a User Story

### To add a note to a user story

1. Open the requirements list page, then select the requirement for which you want to edit user story details and click View.

The Requirement Details page appears.

2. In the User Stories section, click View next to the name of the user story.

The User Story Detail page appears.

3. In the Notes & Attachments section, click New Note.

4. Complete the following fields:

#### **Private**

Specifies when selected that the note can be viewed or edited only by the creator.

**Default:** Cleared

#### **Title**

Specifies the name of the note.

#### **Body**

Specifies content of the note.

5. Click Save.

## Add an Attachment to a User Story

### To add an attachment to a user story

1. Open the requirements list page, then select the requirement for which you want to edit user story details and click View.

The Requirement Details page appears.

2. In the User Stories section, click View next to the name of the user story.

The User Story Detail page appears.

3. In the Notes & Attachments section, click Attach File.

4. Follow the instructions on the page that appears to attach a file.

## Add a Comment to a User Story

### To add a comment to a user story

1. Open the requirements list page, then select the requirement for which you want to edit user story details and click View.

The Requirement Details page appears.

2. In the User Stories section, click View next to the name of the user story.

The User Story Detail page appears.

3. In the Comments section, click New Comment.

4. Enter your comment in the Comment text box and click Save.

## Link an Issue with a User Story

You can link an issue that appears in Agile Vision with a user story.

### To link an issue with a user story

1. Open the requirements list page, then select the requirement associated with the user story to which you want to link an issue and click View.

The Requirement Details page appears.

2. In the User Stories section, click View next to the name of the user story.

The User Story Detail page appears.

3. In the Issues section, click Link to Issue.

The Link to Issue window appears.

4. Enter the first letter of the issue name to display a list of the issues that are in Agile Vision and select the appropriate issue.

5. Click Save and Close if you are done or click Save and New to link another issue with the user story.

## By Example: Connect Traditional Requirements to Agile Development

As release planning is wrapping up, Karen Smith, a Forward, Inc. product owner, discovers that the new software service she is planning will be built by an agile development team. The development team has requested the requirements in the form of user stories.

In Product Vision Karen selects the next release of her product and views the requirements included for the release. She selects each requirement individually and creates user stories that express the requirement. In a few cases, there is only one user story for a requirement, but most requirements spawn several user stories.

Because the development team is using CA Agile Vision, each user story that Karen creates shows up in the backlog for the product, tagged to the correct release in CA Agile Vision.

When Karen completes the user story creation exercise, she returns to the Product Vision requirements list view. In the View field, she selects Traceability Matrix and filters the view to show the product and release she is planning. She can then see the traceability from the selected features for the release to the user stories. She can study the traceability to help ensure that all requirements for her release have an associated user story for the development team.





# Chapter 6: Using Product Vision with Idea Vision

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This section contains the following topics:

[About Using Product Vision with Idea Vision](#) (see page 73)

[Link a Product to an Idea](#) (see page 73)

[Link a Requirement to an Idea](#) (see page 74)

## About Using Product Vision with Idea Vision

You can link products and requirements to ideas in Idea Vision. Note the following rules:

- Although a product can be linked to more than one idea, an idea can only be linked to one product.
- An idea can be linked to more than one requirement.
- A requirement can only be linked to ideas that are linked to its associated product.

Ideas appear in a list on the detail page for a product or a requirement. The following illustration shows a list of ideas for a product.

Ideas		
<a href="#">Link to Idea</a>	<a href="#">Remove Idea</a>	<a href="#">Clear Grouping</a>
Actions ▲	Idea ID	Title
<a href="#">View</a>	087A0000000CpZHIA0	Idea Vi
<a href="#">View</a>	087A0000000Ct73IAC	For De

Ideas cannot be viewed or edited in Product Vision. To see the idea in Idea Vision, click View in the Actions column of the idea.

## Link a Product to an Idea

You can link a product to more than one idea; however, an idea can be linked to only one product.

### To link a product to an idea

1. Open the products list page and click View in the Actions column of the product.  
The detail page appears.

2. In the Ideas section, click Link to Idea.  
The list of ideas available from Idea Vision appears.
3. Select the ideas to link to the product and click Add.

## Link a Requirement to an Idea

To link an idea to a requirement, both must be linked or associated with the same product.

### **To link a requirement to an idea**

1. Open the requirements list page and click View in the Actions column of the requirement.  
The detail page appears.
2. In the Ideas section, click Link to Idea.  
A list of ideas linked to the requirement's product appears.
3. Select the ideas to link to the requirement and click Add.

# Chapter 7: Product Vision Access Rights

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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 A: Third-Party Acknowledgements

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This section contains the following topics:

[Ext JS - JavaScript Library](#) (see page 77)

[JSON 1.0](#) (see page 78)

[jquery 1.3.2](#) (see page 79)

## Ext JS - JavaScript Library

Ext JS - JavaScript Library

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## JSON 1.0

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## jquery 1.3.2

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