CA Clarity™ Agile

Administration Guide

Release 13.3.00

Contact CA Technologies

Contact CA Support

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

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

Providing Feedback About Product Documentation

If you have comments or questions about CA Technologies product documentation, you can send a message to techpubs@ca.com.

To provide feedback about CA Technologies product documentation, complete our short customer survey which is available on the CA Support website at http://ca.com/docs.

Contents

Chapter 1: Setup

Setup the users, roles, products, and releases in CA Clarity™ Agile to enable you to manage projects that follow the agile methodology.

This section contains the following topics:

Users

Add users to the user list on Salesforce.com before they are eligible to be added in CA Clarity™ Agile as users. You can then add the users on teams, and assign to user stories and tasks.

The Users page displays the users who are eligible for assignments in CA Clarity™ Agile. You can filter the list of users by all users (the default) or by product.

Add a User in Salesforce.com

The user profiles that are available for users are part of the Salesforce license.

Note: For more information about user profiles, see the Access Rights appendix in the *Administration Guide*.

Only a system administrator can add a user in Salesforce.com.

Follow these steps:

1. Click Setup.
2. From the Administration Setup in the left pane, click Manage Users.

3. Click Add or edit users and set user quotas.

   The user list page appears.

4. Click New.

5. Complete the requested fields.

6. Save your changes.

   Note: Click *Help for this Page* for information about setting up a user in Salesforce.com.

Add Users

Add a user in Salesforce.com as one of the following profiles before adding them to a team:

- Agile user
- Requirements user
- Agile and Requirements user

Follow these steps:

1. Click Administration, and from Organization, click Users.

   The users list appears.

2. Click Add User.

   The User Edit page appears.

3. Complete the following fields:

   Add User from Salesforce Users

   Defines the name of the user you want to add. You can add multiple users.

   Agile

   Select if the user has access to user stories and sprints.

   Requirements

   Select if the user has access to requirements.

4. Save your changes.

Note: You can click the Details link on the users list, and edit the details on the User Details page.

Set Notifications

You can set notifications for users so that they receive emails for changes to the products they participate in. You can edit your own details and settings for each product that you participate in. The administration user can edit the settings for any user.

Follow these steps:

1. Click Administration, and from Organization, click Users.
2. Click the Details link for the user and set the appropriate settings for notification.
3. Save your changes.

Roles

A role defines the activity that a resource is expected to complete. For example, you need a quality analyst to test the new features in a software application. You can create roles for users to assign in CA Clarity™ Agile or you can download roles from CA Clarity™ PPM, if the two applications are integrated.

Manage a Role

Follow these steps:

1. Click Administration, and from Organization, click Roles.

   The roles list page appears.
2. Click New Role.
3. Complete the requested fields.
4. Save your changes.

Note: You can click the Role ID link on the roles list, and edit the details on the Role Details page. To delete a role, click Delete from the Role Details page or from the roles list.

Create a Role Hierarchy

You can create a role hierarchy that groups related roles together.

An example of a role hierarchy can look like the following example:

- Project manager
  - Architect
  - Development Lead
  - Quality Assurance Lead

Best Practice: You can create the number of levels you need for the hierarchy. The levels are determined as you select the parent for each role. If the hierarchy you want to create is complicated, sketch it out on paper before you start.

Follow these steps:

1. Click Administration, and from Organization, click Roles.
2. Click the Role ID link for the role to which you want to assign a parent.

   The Role Details page appears.
3. In the Parent Role field, select the role from the drop-down.
4. Save your changes.

Products

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

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

See the *Integration Guide* for more information.

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

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

From the Products page, you can do the following tasks:

- Create or edit a product (see page 11)
- View details about a product
- Manage integrated products (see page 12)

Manage Products

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

Follow these steps:

1. Click Administration, from Application, click Products.
2. Click New Product.
3. Complete the requested fields. The following fields require explanation:

   Product Owners

   Specifies the users or super-users that own the product. Selecting a user name provides the user with super-user privileges for objects that are related to the product. A product owner:

   - Can create master releases, releases, features, requirements, sprints, teams, and user stories.
   - Can view the product backlog without being on at team.
   - Can manage backlog items, including adding comments, attachments.
   - Cannot be assigned to an issue or user story unless added to a team by the system administrator.

   Requirement: The system administrator must select Agile on the User page under Administration.
4. Save your changes.

Note: To edit a product, on the products list, click the Details link for the product you want to work with. To delete a product, select the product, and click Delete.

Delete a Product

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

If a product meets the following conditions, you can delete it:

- Product does not contain any releases, sprints, or user stories.
- Product is not active.

How to Manage Integrated Products

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

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

See the *CA Clarity™ Agile Integration Guide* for more information.

Releases

You can create the following types of release in CA Clarity™ Agile:

- Master releases. Allow you to track and manage user stories across multiple products.
- Product releases. Allow you to track and manage user stories specific to a single product.

Master Releases

You can associate a master release with one or more products. Associating products with a master release allows you to track user stories that are completed by multiple product teams as part of a single cross product release.

For example, Company X is working on a release that integrates three of its products (A, B, and C). The following product teams are assigned the user stories and tasks for each integration piece:

- Product Team A. Completes the user stories for integrating products A and B.
- Product Team B. Completes the user stories for integrating products B and C.
- Product Team C. Completes the user stories for integrating products A and C.

A master release D is created and associated with all the three products. The master release allows Company X to oversee the progress of all the user stories and tasks that are completed by all the teams. The Product members can view the associated master release from a user story.

When you assign a product release to a master release, all user stories within the product release are automatically assigned to the master release. If you do not want all user stories in a product release that is assigned to a master release, associate individual user stories to a master release. You can associate individual user stories to a master release as long as the product is associated with the master release.

You can associate a product with multiple master releases.

If your CA Clarity™ Agile product is integrated to a Clarity project, you can associate the Clarity project to a master release in CA Clarity™ Agile. Doing so allows you to manage all user stories and tasks that are assigned to the master release from Clarity.

Product Releases

Some organizations decide their release schedule in advance, and others decide to release whenever a sprint ends and it seems advantageous to do so. CA Clarity™ Agile supports both strategies.

With either approach, a release happens at the end of a sprint and contains all the functionality that is implemented in all the sprints from all previous releases. Therefore, a release contains one or more sprints.

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

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

See the *Integration Guide* for more information.

From the Releases page, you can do the following tasks:

- Manage a release (see page 14)
- View details about a product release
- Edit product release properties

Manage Master Releases

As an administrator, you can create master release.

Follow these steps:

1. Click Administration, and from Application, click Master Releases.

   The master release list page appears.

2. Click New Master Release.

   The New Master Release pop-up appears.

3. Complete the required fields. The following fields require explanation:

   Associated Products

   Defines the products that are associated with the master release. Associating a product to a master release allows you to associate user stories from that product to the master release.

4. Save your changes.

Note: You can click the Details link on the master release list, and edit the details on the Master Release Details page. To delete, click Delete from the Master Release Details page or from the master release list.

Manage Product Releases

Product releases consists of user stories that are specific to the product. The user stories in the product release are covered over multiple sprints.

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

Follow these steps:

1. Click Administration, and from Application, click Releases.

2. Click New Release.

   The New Release pop-up appears.

3. Complete the requested fields. The following fields require explanation:

   Active

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

   Default: Active

   Master Release

   Defines the master release to which this release is associated. If the product has been associated with a master release, you can select a master release for this release.

   When you associate a product release to a master release, all user stories from all products in the product release automatically associates with the master release. If you do not want all user stories in a product release to assign automatically to the master release, associate individual products to the master release. You can then select which user stories from which products you want to assign to the master release.

   Release Date

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

   Format: mm/dd/yy

4. Save your changes.

Note: To edit, click the Details link for the release you want to work with. To delete, select the release, and click delete.

Delete a Release

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

Deleting a release has the following results:

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

Recalculate Release Burndown Charts

You can recalculate the release burndown charts in a sprint. Recalculating is recommended if you have mapped the custom values for status to either Open or Closed and to burn down hours or points for charts.

When the custom status for user stories or requirements changes, the actual total points and hours in the charts change. For example, consider the "Completed" status value is open for a user story. Recalculate Sprint burns down the hours and points that are associated with the user story when you change the status to closed. The recalculation uses the latest status of the user stories in the sprint.

The remaining points for user stories are calculated by subtracting the points for closed stories. The remaining points on tasks are calculated by subtracting the hours that are logged on tasks. You can recalculate the burndown charts only within active sprints, and if the release burndown involves less than 1000 user stories.

The following lines are recalculated:

- Burnup line - show the daily gain rate of work units that are required to attain your goal for the sprint.
- Estimation line - the original estimate, in hours, for the sprint.
- Hours Completed line - the number of hours that are completed for the sprint.
- Velocity in the velocity chart.

Sprints

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

From the Sprints page, you can do the following:

- Manage a sprint (see page 17)
- View details about a sprint
- Edit sprint properties (see page 17)
- Delete a sprint (see page 17)

Manage a Sprint

If the sprint has not completed, a user with super user privileges can edit details of sprint including the start and end dates of a sprint. If you change the sprint dates, burndown and velocity is recalculated. The charts on Sprint Details and Dashboard pages is updated. To edit a sprint, on the Sprints page, click Details next to the sprint name you want to edit.

Follow these steps:

1. Click Administration, and from Application, click Sprints.

   The Sprints page appears.

2. Click New Sprint.

3. Complete the requested fields.The following fields require explanation:

   Goals

   Specifies the expected results for the sprint.

   Limits: 3000 characters

   Risks

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

   Limits: 2000 characters

4. Save your changes.

Note: To edit, click the Details link for the sprint you want to work with.

Delete a Sprint

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

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

Kanban

Kanban emphasizes visualizing all the steps in the workflow and reducing the number of work items in progress. Kanban is implemented using a board known as the Kanban Board. The progress of a project is tracked on the Kanban Board. The Kanban Board has status lanes which correspond to the different stages in the lifecycle of a project. As the project progresses, the work items of the project move from one lane to another.

Configure the Kanban Board

You can configure the Kanban Board to deliver the project using the Kanban methodology. The Kanban Board for a release helps track the progress of the project and identify any roadblocks. To create a Kanban Board, configure the following two attributes:

Status Lanes

They represent the stages in the lifecycle of the project. Map the status lanes to one of the statuses of user stories.

WIP Limit

The maximum number of user stories that you can work on at any time. You can define a WIP limit for each status lane.

For example, Michael configures a new kanban board with the following status lanes and WIP limits:

Status Lane	Description	WIP Limit
Planned	User stories ready for development.	5
Development	User stories under development.	3
Test	Developed user stories under testing.	2
Completed	User stories ready to close.	5

Michael can pull the user stories from the backlog to the Kanban Board for the team to work on.

Follow these steps::

1. Click Administration, and from Application, click Releases.
2. Select the product name from the Product drop-down list.
3. Click Details for the release for which you want to create a Kanban Board.
4. Scroll down to the Kanban Boards sections, and click New Kanban Board.
5. Complete the required information.
6. Save your changes.

You can also create a Kanban Board from the Kanban List page.

Follow these steps::

1. Click Administration, and from Application, click Kanban Boards.
2. Click New Kanban Board.
3. Complete the required information.
4. Save your changes.

Chapter 2: Configuration

This section contains the following topics:

How to Customize Values

Some values are available by default for all products. As a system administrator, you can also create new custom values for object fields at the application level. These custom values then show up on appropriate pages as values you can select from drop-down lists.

You do most customization by clicking the Setup link to the Salesforce.com setup page.

The following are some examples of fields you can customize:

- Category
- Requirement State
- Product State
- Priority. Includes values for issues, user stories, and epics that are associated with a product.
- Status. Includes values for issues, tasks, user stories, and epics that are associated with a product.

You can configure custom values in the following ways:

- Rename the values using Translation Workbench. (see page 23)
- Edit certain attributes of the values. (see page 22)
- Replace the values with other values.
- Specify default values (see page 24)
- Reorder the values in the list.
- Delete the values.
- Translate the values in all supported languages.

Best Practices:

- Use the Translation Workbench from the Administration Setup menu to rename the values (in English language) instead of editing the existing attribute to relabel it.
- A value equivalent to Closed is needed for the burndown and velocity charts. You can create a value and can map the status using Status Mapping in the Administration menu.

More Information:

How to Customize Attributes (see page 24)
Enable or Disable Custom Attributes for Objects (see page 25)
Create Custom Values (see page 22)

Create Custom Values

For complete information about creating custom values, see the *Salesforce.com Help & Training.* This documentation is available if you click the Setup link to bring up Personal Setup, and then click the Help link.

Follow these steps:

1. Click the Setup link in the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Create from the App Setup menu and select Objects.

   The Custom Objects page appears.

3. Click the object name that you want customize (for example, User Story).

   The Custom Object page appears.

4. In the Custom Fields & Relationships section, scroll to the field label for which you want to customize values.

5. Click the field label.

   The Custom Field page appears.

6. Scroll to the Picklist Values section and customize the values as desired.

Rename Picklist Values Using Translation Workbench

As an administrator you can change the display text of the picklist values through the translation workbench in the Salesforce.com platform.

Follow these steps:

1. Click the Setup link on the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Translation Workbench from the Administration Setup menu and select Translate.

   The Translate page appears with filter criteria.

3. In the 'Select the filter criteria' perform the following tasks:

   - Select the Language that you want to translate the picklist values into.
   - Select the Picklist Value from the Setup Component field.
   - Select the Object to translate the required picklist attribute.

4. Click the + icon to expand the attribute you selected.

   The picklist values are displayed in the table.

5. Double-click the cell against the 'Picklist value label translation' to make the field editable.

6. Fill in the translation text for the picklist value and click Save.

   Note: You can perform the same exercise for the other languages and objects.

Publish List View Changes

You can publish changes that are made to list views for all users in your organization to see. These changes can include modified object or attribute labels, picklist labels, and translations; or deleted custom attributes.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.

2. Open the List Views Publishing page from the Administration menu.

3. Click Publish.

   Changes that you have made to the list views are distributed to the other users in your organization.

Set up Default Values for User Story, Issue, and Custom Objects

You can set up default values for a user story, issue, or any custom CA Clarity™ Agile object.

Follow these steps:

1. Click the Setup link in the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Create from the App Setup menu and select Objects.

   The Custom Objects page appears.

3. Click the object name for which you want to set the default (for example, User Story).

   The User Story Custom Object page appears.

4. Scroll to the Record Types section and click the User Story record type label.

   The Record Type page appears.

5. Click Edit next to the Picklist field for which you want to select default values.

6. Select values from the Default drop down and save.

How to Customize Attributes

As a system administrator, you can create custom attributes for CA Clarity™ Agile objects at the application level, on the Setup page. For example, you can add a status field to the user story object.

When you create a custom attribute, it is available to all products by default. If you enable the attribute for a specific product, it is no longer available to all products. Add the attribute to any other product that wants to use it from the custom attributes page.

You can create a maximum of 25 custom attributes per object per product. You can add custom attributes to the following objects:

- Acceptance Criteria
- Epic
- Issue
- Master Release
- Release
- Sprint

- Story Dependency
- Task
- Team
- Team Member
- Theme
- User Story

Create Custom Attributes

For complete information about creating custom attributes, see the *Salesforce.com Help & Training.* This documentation is available if you click the Setup link to bring up Personal Setup, and then click the Help link.

Follow these steps:

1. Click the Setup link on the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Create from the App Setup menu and select Objects.

   The Custom Objects page appears.

3. Click the object name for which you want to customize attributes.

   The Custom Object page appears.

4. Scroll to the Custom Fields & Relationships section and customize the fields as desired.

Best Practice: If you create a custom attribute for the Status value of the user story or requirement object, specify whether the custom status is an Open or Closed state. You can use the Status Mapping (see page 26) page from the Administration menu to specify the custom status. Specifying whether the status is open or closed ensures the accuracy of burn-down and velocity charts.

Enable or Disable Custom Attributes for Objects

If you enable a custom attribute for a specific product, it is no longer available to all products. Enable it for any other product that wants to use the attribute.

To remove or disable a custom attribute from an object, select the attribute and click Delete.

Follow these steps:

1. Click the Administration menu and select Custom Attributes.

   The custom attributes page appears.

2. Select the product and the object for which you want to enable custom attributes.

   Any existing custom attributes that are enabled for the object appear.

3. Click New Custom Field.

   A pop-up appears.

4. Select an existing custom field name and save.

   The field appears in the field labels list.

Map Custom Status Attributes

When you create a custom status for a user story or issue object, specify whether the status means that the object state is open or closed. The accuracy of burn-down and velocity charts relies on the status of the object.

For example, if you create a status called Done, specify the status means "Closed" so that the chart can burn down the completed hours of work for the object.

Follow these steps:

1. Open Administration, and from under Configuration, click Status Mapping.

   The Status Mapping page opens with a list of custom status attributes.

2. Click the Mapped Value field for the value that you are mapping and select Open or Closed from the pull-down list.

3. Click Save.

Important! If you have user stories and issues in a current sprint, click Recalculate Chart to refresh the sprint information and repopulate the burn-down and velocity charts.

Recalculate Release Burndown Charts

You can recalculate the release burndown charts in a sprint. Recalculating is recommended if you have mapped the custom values for status to either Open or Closed and to burn down hours or points for charts.

When the custom status for user stories or requirements changes, the actual total points and hours in the charts change. For example, consider the "Completed" status value is open for a user story. Recalculate Sprint burns down the hours and points that are associated with the user story when you change the status to closed. The recalculation uses the latest status of the user stories in the sprint.

The remaining points for user stories are calculated by subtracting the points for closed stories. The remaining points on tasks are calculated by subtracting the hours that are logged on tasks. You can recalculate the burndown charts only within active sprints, and if the release burndown involves less than 1000 user stories.

The following lines are recalculated:

- Burnup line - show the daily gain rate of work units that are required to attain your goal for the sprint.
- Estimation line - the original estimate, in hours, for the sprint.
- Hours Completed line - the number of hours that are completed for the sprint.
- Velocity in the velocity chart.

How to Customize Details Pages

You can change the way some details pages look by adding, editing, or deleting the following properties of the page:

- Sections
- Fields
- Section Headings

The changes that you make are at the system level and apply to all users. You can rename sections and fields to accommodate your business needs. You can restore them if you want to revert to the default sections and fields that have been deleted or renamed.

Only the properties portion of the details pages can be modified. Related list sections that are found on the details page that are not part of the properties cannot be modified. The following list shows the details pages that you can configure.

- User Story
- Task
- Issue
- Sprint
- Products
- Releases
- Epics
- Sources
- Products
- Releases
- Requirements
- Features

Only a super user or system administrator can customize a properties page. Agile super user can customize only Agile pages, and Requirements super user can customize only Requirements pages. An Agile/Requirements super user can customize pages in both Agile and Requirements.

Add a Section to a Page

Follow these steps:

1. Go to the Administration menu and select Property Views from the Configuration menu.
2. In the View field, select the property view that you want to configure.

   The sections for the property view appear in a list.
3. Click New Section and complete the following fields:

   Section ID

   Specifies a unique alpha-numeric identifier for the section. You can use only numbers, letters and an underline character to create the ID.

   Header Label

   Specifies a name that appears in the header of the section. If a name is not provided, the fields in the section appear on the page without any marking to indicate the section.

Use Single Column Layout

Specifies whether the section uses single-column or two-column layout.

Default: Unselected

Position

Indicates the position of the section in relation to other sections. Sections appear in the order assigned. If you do not select a position, the section is assigned to the largest value available for the page.

4. Click Save.

Configure Fields for Sections on a Page

Follow these steps:

1. Go to the Administration menu and select Property Views from the Configuration menu.
2. In the View field, select the property view of the page that you want to configure.

   The sections for the property view of the page appear in a list.
3. Click Configure Layout.

   A window appears with a list of the sections for the page. Each section contains a list box of available and selected fields.
4. In each section, select the fields to display in the Available list box and drag the fields to the Selected list box.

   A field can appear in only one page section. If you select a field for a section, that field becomes unavailable for other sections and no longer displays in the list boxes for those sections.
5. Click Save.

How to Set Up a Multiple Value Lookup Field

You can use a Multiple Value Lookup (MVL) field to link a custom object with multiple field values to a CA Clarity™ Agile object.

For example, create a custom object called Risk, which holds the product wise information on any development risk that is involved and its severity. You can link this custom object with user stories to give more comprehensive information.

You can link an MVL field to the following built-in objects:

- User Story
- Issue
- Task
- Requirement
- Product
- Release
- Sprint
- Source
- Epic
- Feature

To set up an MVL field, do the following tasks:

1. Create Custom Objects (see page 31).
2. Create Junction Objects (see page 31).
3. Create MVL (see page 32).
4. Configure the MVL (see page 33).
5. Configure the columns in MVL (see page 34).

Create Custom Objects

For complete information about creating custom objects, see the *Salesforce.com Help & Training*. This documentation is available if you click the Setup link to bring up Personal Setup, and then click the Help link.

For example, create a custom object Risk, with fields Description, Severity and Product.

Follow these steps:

1. Click the Setup link on the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Create from the App Setup menu and select Objects.

   The Custom Objects page appears.

3. Click New Custom Object.
4. Complete the following fields:

   Label

   Plural Labels

   Data type

5. Click Save.
6. Scroll to the Custom Fields & Relationships section and customize the fields as desired.
7. Save your changes.

Create Junction Object

A junction object is a custom object that helps you to link one custom object with another built in object. For example, create a junction object called UserStory_Risk to link the custom object Risk with User Stories.

Follow these steps:

1. Click the Setup link on the CA Clarity™ Agile header area.

   The Salesforce.com Personal Setup page appears.

2. Click Create from the App Setup menu and select Objects.

   The Custom Objects page appears.

3. Click New Custom Object.

4. Complete the following fields:

   Label

   Plural Labels

   Data type

5. Click Save.
6. Scroll to the Custom Fields & Relationships section.
7. Create the following two custom fields and customize as desired:
   - A lookup data type field which is related to the custom object you created. For example, create a custom field Risk which is related to the custom object Risk that you created earlier.
   - A lookup data type field which is related to the user story object.
8. Save your changes.

Create MVL

The multiple value lookup allows you to configure the custom object with multiple values to show up with the built-in object.

For example, the Risk field is available for entry when you work on User Stories.

Follow these steps:

1. Click Administration, and from Configuration, click Custom MVL.
2. Select a Record Type for which you want to create MVL.

   For example, select user story as the Record type if you are configuring MVL for Risk.

3. Click New MVL.
4. Complete the following fields:

   Secondary Object

   A custom object associated with the record type. For example, select Risk for the record type user story.

   Junction Object

   Select the custom object name to store the relationship between the Record Type and the Secondary Object. For example, select UserStory_Risk object.

   Primary Field

   Select the primary field that junction object is associated to. For example, select User Story as the primary field.

Secondary Field

Select the secondary field that junction object is associated to. For example, select Risk as the secondary field.

MVL View Field Columns

Select the fields of the secondary object. You can select only TEXT and pick list type fields.

5. Save your changes.

The MVL is created and available for you when you configure the related object.

Note: Click Administration, and from Configuration, click Property Views, and verify the custom_mvl section is available in the object property view.

Configure the MVL

The MVL by default returns all the values that are available for the configured objects. You can configure the MVL to show only relevant values for the associated record type.

For example, the Risk MVL shows all the available risks when you configure it for a user story, regardless of the product the user story is associated with. However, you can configure the Risk MVL to show the risks that are associated with the products that the users stories are related to.

Follow these steps:

1. Click Administration, and from Configuration, click Custom MVL.
2. Select a Record Type. And click Edit for the MVL you want to configure.

3. Modify the Available SOQL using appropriate parameters.

   For example, select Id, Name, Description from Risk__c where product__c = :productid

   Parameters are available for the following objects:

   User Story

   :id, :productid

   Issue

   :id, :productid

   Task

   :id, :userstoryid

   Requirement

   :id

   Product

   :id

   Release

   :id, :productid

   Sprint

   :id, :productid, :releaseid

   Source

   :id

4. Save your changes.

Configure the columns in MVL

The columns in MVL appear in the order they are created, however you can reorder the columns and adjust the width of the columns.

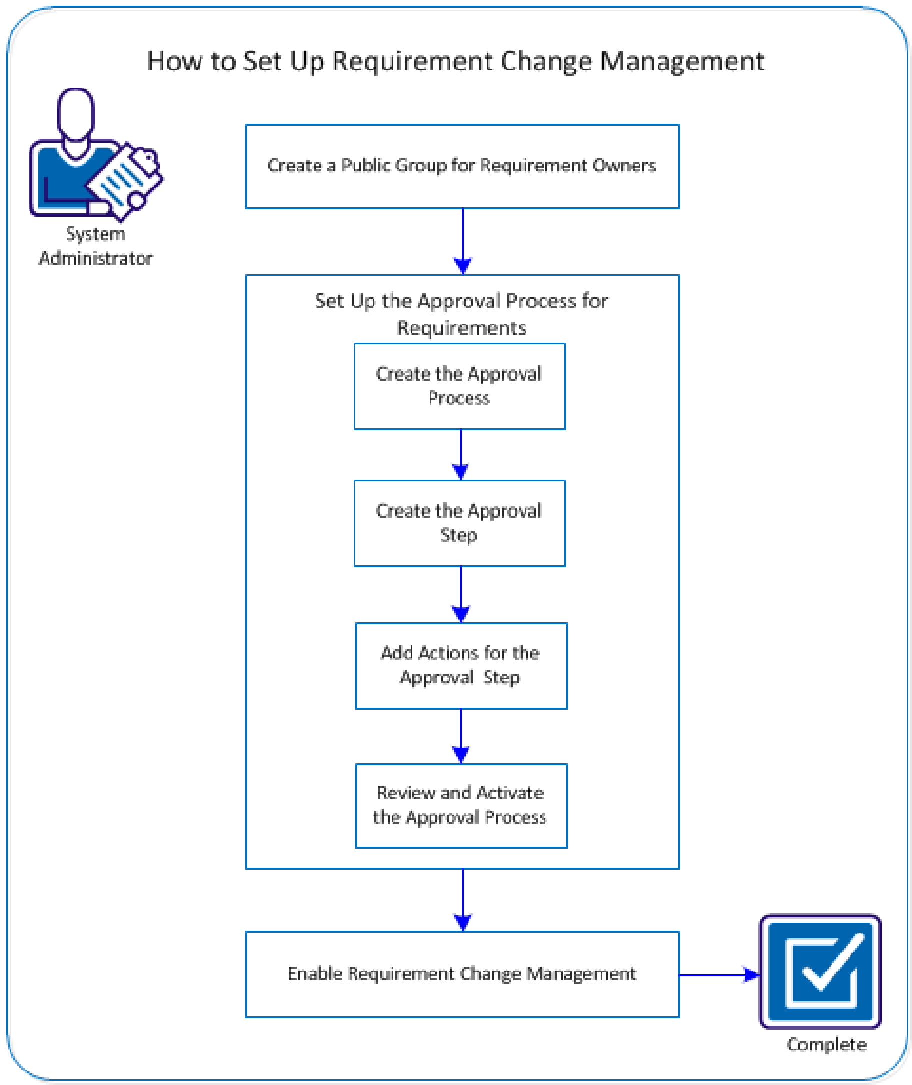
Follow these steps:

1. Click Administration, and from Configuration, click Custom MVL.
2. Select a Record Type, and click View for the MVL you want to configure.
3. Edit inline the width and the order of the columns appearing under MVL View Field Columns.
4. Save your changes.

How to Set up Requirement Change Management

Requirement Change Management (RCM) provides the ability for the product owner to manage an approval process for drafting and updating product requirements. The users who submit requirements are called Requirement Owners. As the system administrator, you can set up the approval process for requirement drafts and enable change management for requirements.

The following diagram describes how a system administrator can set up Requirement Change Management.



To set up RCM, perform these steps:

1. Create a public group of requirement owners (see page 36).
2. Set up the approval process for requirements (see page 36).
3. Enable Requirement Change Management (see page 41).

Set Up the Approval Process for Requirements

In RCM, the requirement owners follow a process to get their requirement requests approved. The process defines what happens when requirement owners submit requirements. For example, set up an approval process in Salesforce.com containing one defined step with two actions, to approve or reject the requirement.

To set up the approval process, perform these steps:

1. Create the Approval Process (see page 37).
2. Create the Approval Step (see page 39).
3. Add Actions for the Approval Step (see page 40).
4. Review and Activate the Approval Process (see page 41).

Create a Public Group of Requirement Owners

Create a group to include the users who can participate in the RCM process and can submit the requirements. This group is called a public group. For example, include all the product users in the public group so that they can submit new requirements for approval. Users that are not included in the group cannot submit the requirement for approval.

Follow these steps:

1. Log in to Salesforce.com as the system administrator, and click Setup.
2. Expand Manage Users from the Administration Setup, and click Public Groups.

3. Click New to create a new public group.
4. Enter AllInternalSubmitters in the Label field.

   The Group Name field is automatically populated.

   Important! Ensure that the group name is AllInternalSubmitters. CA Clarity™ Agile is set up so that each time you add a user, they are automatically added to this group. If you provide a different name, the new users are not automatically added to the group.
5. Select all existing users from the Available Members list.
6. Click Add to move the user names to the Selected list.
7. Save your changes.

   You have created the public group of users who can submit requirement approval requests.

Create the Approval Process

You can create an approval process to define the steps that the requirement requests go through before getting approved or rejected.

Important! Configure all of the fields and options that are listed in these steps. Retain the default values for the other fields that appear in these steps.

Follow these steps:

1. Log in to Salesforce.com as the system administrator, and click Setup.

   The Salesforce.com setup page opens.
2. Expand App Setup, Create, Workflows & Approvals, Approval Process.
3. Select Requirement as the object for which you are creating the approval process.
4. Click Create New Approval Process.
5. Select Use Standard Setup Wizard from the drop-down list.
6. Enter the Change Management Process in the Process Name field.
7. Click Next.
8. Click Next again to skip the step for setting criteria because all of the requirements follow the same process.
9. Navigate to Record Editability Properties, and select Administrators OR the currently assigned approver can edit records during the approval process.
10. Click Next and then click the Lookup icon in the Email Template section.
11. Select Scrum Templates from the pull-down list.
12. Click RequirementsApprovalEmailTemplate from the Search Results and click Next.

13. Select the fields in the following list and click Add.
    - Actual Cost
    - Actual Effort (in hours)
    - Age
    - Category
    - Closed Date
    - Complexity
    - Confidence Level
    - Created By
    - Current Version Number
    - Description
    - Financial Benefits
    - Parent Requirement (Select the first of two fields with this name)
    - Planned Cost
    - Planned Effort (in hours)
    - Planned vs Actual Cost
    - Planned vs Actual Effort (in hours)
    - Priority
    - Problem
    - Remaining Cost
    - Remaining Effort (in hours)
    - State
    - Version Status
14. The fields appear in the Selected Fields list indicating which fields appear on the approval page. The Title and Owner field names are already in the Selected Fields list.
15. Click Next.
16. Select Public Groups from the Search drop-down list to specify the submitter type.
17. Select Public Group: All Internal Users from the Available Submitters list and click Add.

18. Click Save.

    The What Would You Like To Do Now? page appears.

19. Select Yes, I'd like to create an approval step now.
20. Click Go! to open the New Approval Step page.

The approval process is created. In the next step, you create the approval steps.

Create the Approval Step

After the approval process is created, create the approval steps and specify the details. For example, specify the approval and rejection steps and configure how many approvers can be specified.

Important! Configure all the fields and options that are listed in these steps. Retain the default values for the other fields and the options that appear in these steps.

Follow these steps:

1. Enter Final Version Review in the Name field of the New Approval Step page and press the Tab key.

   The Unique Name field is automatically set to Final_Version_Review and the Step field is set to 1.

2. Click Next.
3. Select All records should enter this step.

   This is the default step criteria for the Approval Process step.

4. Click Next.
5. Perform the following steps and specify up to ten default approvers:
   a. Select Automatically assign to approver(s).
   b. Select Related User from the drop-down list.
   c. Select Default Approver 1 as the related user.

      You can add up to ten approvers to the list.

   d. Click Add Row and select Related User.

e. Select Default Approver 2 to add a second default approver.

   You can repeat these steps to add Default Approver 3 to 10.

f. Select Approve or Reject based on the FIRST response.

g. Click Save.

   The What Would You Like To Do Now? page opens.

6. Select No, I'll do this later. Take me to the approval process detail page to review what I've just created.
7. Click Go! to continue.

   The Requirement: Change Management Process page opens and shows the entire approval process that is defined until now.

Add Actions for the Approval Step

After the approval process step is created, specify the actions for each step. For example, consider the following scenarios:

- The requirement owner clicks Submit for Approval on the Requirement Details page
- The approver clicks either Approve or Reject for the draft on the pop-up dialog

The Requirement: Change Management Process page shows the entire approval process, and has sections that let you define the submission and approval step actions.

Important! All the fields and options defined in these steps are mandatory.

Follow these steps:

1. Click Add Existing in the Initial Submission Actions section.
2. Select Field Update: Draft Submitted from the Search drop-down list.
3. Click Add.
4. Save your changes.

   The Requirement: Change Management Process page opens.

5. Scroll to the Final Approval Actions section.
6. Click Edit for the Record Lock action.
7. Select Unlock the record for editing and click Save.
8. Click Add Existing and select Field Update from the Search drop-down list.
9. Select Field Update: Draft Approved from the Available Actions list.
10. Click Add.
11. Save your changes.

12. Scroll to the Final Rejection Actions section.
13. Click Add Existing and select Field Update from the Search drop-down list.
14. Select Field Update: Draft Rejected from the Available Actions list.
15. Click Add.
16. Save your changes.

The approval process for requirements is now ready for review and activation.

Review and Activate the Approval Process

After actions are added to the approval steps, review and activate the approval process. Review the steps and actions, and modify them if necessary. After you activate the approval process, you cannot modify the steps or actions.

Follow these steps:

1. Click View Diagram on the Requirement: Change Management Process page and review the work flow diagram of the approval process.
2. To modify the approval step or actions, complete these steps:
    a. Close the diagram and return to the Requirement:Change Management Process page.
    b. Click Edit and make the necessary changes.
    c. Save your changes.
3. Click Activate to enable the process.

    The approval process is now active.

Enable Requirement Change Management

After you set up the approval process for requirements and activate it, enable Requirement Change Management so that the users can participate in it.

Follow these steps:

1. Click Administration, and from Configuration, click Global Configuration.
2. Select the Requirement Change Management check box.
3. Save your changes.

You have successfully set up Requirement Change Management. The first time that you enable change management, existing requirements are migrated to change management. The status of all the existing requirements changes to draft and the version number of the requirements displays as 0.0.

Disable Change Management for Requirements

Disable change management for requirements to discontinue using the approval process. When you disable change management for requirements, a background job automatically approves all pending requests.

Follow these steps:

1. Click Administration, and from Configuration, click Global Configuration.
2. Clear the Requirement Change Management checkbox.
3. Save your changes.

   The background job begins approving requirements that have been submitted for approval. You receive an email notification when the job completes. The following changes occur for approved requirements:

   - The version number of the approved requirements increases by a full version number.
   - The Approval History section is removed from the Requirements Details page.

Configure to Generate Joined Reports

You can join two reports to generate a single report. For example, join User Story Owners report and Task Owners report to generate Sprint Work Asssignments report. Configure the following settings to join two or more reports.

- Enable Report Builder Upgrade.
- Enable New User Interface Theme.

Follow these steps:

1. Login to CA Clarity™ Agile as administrator and click Setup.
2. **Enable Report Builder Upgrade.**
   - Click Customize, and from Reports and Dashboards, click User Interface.
   - Click Enable in the Report Builder Upgrade section.
3. **Enable New User Interface Theme.**
   - Click Customize, and click User Interface.
   - Select Enable New User Interface Theme.
4. Save your changes.

Chapter 3: Third-Party Integrations

You can integrate with the following products:

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

For more information about integrating with other products, see the *CA Clarity™ Agile Integration Guide*.

This section contains the following topics:

Enable Integration with Other Products

You can enable integration with the following tools:

- JIRA
- HP Quality Center
- CA Software Change Manager

Follow these steps:

1. Click Administration, and from Configuration, click Global Configuration.

   The Global Configuration page appears.

2. Select the products for which you want to enable integration:

   Integrate with JIRA

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

JIRA URL

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

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

Integrate with Quality Center

Specifies whether integration with Quality Center is enabled or not.

Integrate with CA Software Change Manager

Specifies whether integration with CA Software Change Manager (CA SCM) is enabled or not. You can integrate with CA SCM to view information about packages that are related to user stories.

Important! To integrate, install and configure CA Software Change Manager. See *CA Software Change Manager Implementation Guide* and *CA Software Change Manager Administration Guide* for more information.

Requirement Change Management

Specifies whether the Requirement Change Management is enabled or not. If selected, CA Clarity™ Agile allows you to submit requirement change requests for approval.

Note: This is not a product integration.

3. Save your changes.

Disable Integration with other Products

At any time, you can disable the integrations with other products.

Note: Clearing the integration options on the Integration page only hides the fields that are related to the tools. This action has no impact on the synchronization jobs that run in the background. Packages, issues and cases continue to be updated from the tools. To disable the integrations completely, disable the synchronization jobs from the other products.

See the *CA Clarity™ Agile Integration Guide* for more information.

Follow these steps:

1. Click Administration, and from Configuration, click Global Configuration.

2. Clear the appropriate check boxes:
   - Integrate with JIRA
   - Integrate with Quality Center
   - Integrate with CA Software change Manager.
3. Save your changes.

Map an CA Clarity™ Agile Product to a Quality Center Product

Before mapping a CA Clarity™ Agile product to a Quality Center project, configure CA Clarity™ Agile to enable QC integration.

After you map a project, if you delete this project in Quality Center, this project is removed from the mapping list in CA Clarity™ Agile.

Follow these steps:

1. Click Administration, and from Application, click Products.

   The Products page appears.
2. Click New Product or click the Details for an existing project.
3. In the HP Quality Center section, select a Quality Center project from the Map this product to dropdown.
4. Save your changes.

Chapter 4: Importing Data

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

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

Follow these steps:

1. Click Setup in the header.

   The Salesforce.com Setup page appears.

2. Click Data Management in the Administration Setup menu.

   The Data Management page appears.

3. In the Data Management section, click Download the Data Loader.
4. Install the data loader.
5. Start the data loader and click Cancel to close the welcome page.
6. Click Settings and select Settings.

   The Settings window appears.

7. Provide the following information and click OK:

   Server URL

   https://login.salesforce.com

   Proxy host

   Your company proxy details

   Proxy port

   Your company proxy port

   Proxy username

   Your company proxy username

   Proxy password

   Your company proxy password

8. Log in with your user name and password.

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

Appendix A: **CA Clarity™ Agile Profiles**

This section contains the following topics:

Agile/Requirements Super-User

A user with this profile has administrator privileges to CA Clarity™ Agile data, but not to the Force.com operating environment.

The super user can view, create, edit, and delete the following:

- Users
- Epics
- Features
- Kanban Boards
- Products
- Releases
- Requirements
- Roles
- Sprints
- User stories
- Tasks
- Teams
- Themes

Agile/Requirements User

A user with this profile has the rights to the following tasks.

View, create, edit, and delete the following:

- Epics
- Features
- Products
- Releases
- Requirements
- User stories
- Tasks
- Teams
- Themes

Agile Super-User

A user with this profile can do any of the following tasks using features listed on the Administration menu.

View, create, edit, and delete the following regardless of product membership. They also have the rights to participate in a product provided they are on the product team.

- Users
- Product
- Release
- Sprint
- Team

View, create, edit, and delete the following, when on a product team:

- Epics
- Kanban Boards
- Tasks
- Themes
- User stories

Agile User

A user with this profile has the rights to do the following tasks.

Create, edit, and delete:

- Epics
- Tasks
- Teams
- Themes
- User Stories

Edit the details for:

- Users
- Products
- Releases
- Sprints

The agile users can only select the products for which they are members.

Requirements Super User

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

- Add Users, Roles, and Personas.
- Create and Manage:
  - Features
  - Products
  - Releases
  - Requirements

Requirements User

A user with this profile can do the following tasks.

Create and Manage:

- Features
- Personas
- Products
- Releases
- Requirements

If assigned to a product, the user can view Agile pages and do any of the following tasks from the Agile menu:

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

Appendix B: **Upgrade from CA Clarity™ Agile** Team Edition to Enterprise Edition

To learn about upgrading from previous releases, see the *Implementation Guide* for that release.

1. Open support.ca.com.
2. Select CA Clarity™ Agile from the Product Finder.
3. Click Bookshelves.
4. Click the bookshelf link for a release.
5. Scroll to Product Documentation section.
6. Locate the Implementation Guide.