CA Clarity Requirements

User Guide

Winter 2013

CA Technologies Product References

This documentation set references the following CA Technologies brands and products:

- CA Clarity Agile
- CA Clarity Requirements
- CA Clarity PPM
- CA Clarity Ideation
- CA Software Change Manager

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

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Chapter 1: Introduction

This section contains the following topics:

Overview

CA Clarity Requirements lets you manage requirements for projects, services, products, releases, and features. Using CA Clarity Requirements, you can trace a requirement from its original requester to its inclusion in a particular feature or release for a product. You can include detailed information about the requirement, its benefits, the source of the requirement, competing products, and ranking information. Associating these types of information with requirements can help you decide whether to include a requirement in a product release.

You can also associate requirements with CA Clarity Agile™ user stories, from scrum methodology, to 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.

CA Clarity Requirements and CA Clarity PPM

When CA Clarity Requirements is integrated with CA Clarity PPM, the following tasks can be accomplished:

- Role hierarchies can be downloaded from CA Clarity PPM to CA Clarity Requirements.
- A CA Clarity Requirements requirement can be linked with a CA Clarity PPM task from CA Clarity PPM.

An administrator, with appropriate privileges in CA Clarity Requirements and CA Clarity PPM, performs these tasks.

When integration is completed, the requirements and tasks are linked. The users can then see cost and effort information from CA Clarity PPM. The following information is available:

- Planned Cost
- Actual Cost

- Planned vs Actual Cost
- Planned Effort
- Actual effort
- Effort Remaining
- Planned vs Actual Effort

Note: For more information about using CA Clarity Requirements with CA Clarity PPM, see the *Integration Guide*.

Audience

This guide is intended for anyone who uses the product on a daily basis to manage agile projects, including the following users:

- Product Owner (also can be the business analyst) – The person who is responsible for maintaining the product including release schedules, features, and requirements. The product owner can also review the product roadmap based on both master and subreleases. The product owner represents the stakeholders and the business.
- PMO (project management office or similar role) – The person responsible for adhering the organizational processes for setting up projects and rolling them up to portfolios, and so on. Often, this job is de-centralized, but for the purpose of this exercise, we have summarized it to a single user.
- Scrum Master (or Agile project manager) –The person who is responsible for the user stories and backlog. The scrum master creates sprints, manages team assignments, and monitors the status of the agile projects.
- Development Team – The users who do the day-to-day work of the sprint project. The development team creates tasks, updates task status (with hours and estimates), creates issues, and gives feedback on success to the scrum master.
- Portfolio Manager (also could be business manager or stakeholder) – The person responsible for seeing the roll-up of the agile projects with the traditional projects.

Log in to CA Clarity Requirements

Your CA Clarity Requirements administrator prepares the product so that you can use it on a daily basis to manage your projects. After your administrator prepares the product, they will provide you with the URL and login credentials for you to log in.

When you first log in to CA Clarity Requirements, you are instructed to change your password immediately.

Follow these steps:

1. Log in to CA Clarity Requirements at the following URL in your Web browser:
   `https://cavision.cloudforce.com`
2. Enter a new password and confirm it.

   Your new password must meet the following criteria:

   - At least eight characters
   - Uppercase and lowercase alphanumeric characters
3. Select a security question from the drop-down.
4. Enter your answer.
5. Save your changes.

Chapter 2: List Pages

The CA Clarity Requirements pages have a number of convenient features to help you set up and manage your products more easily. The setting for the number of records to display on a list page is persisted for each browser and for each user. If you view the same list in a different browser, set this value again.

This section contains the following topics:

List Page View and Edit

You can edit a page, only if you have the rights to edit. You can use the Details links on the list pages to do the following actions:

Edit

You can open the details page for the item and can change the values in any of the fields that are active.

Note: Details link allows you to view and edit information.

View

If you are not the creator of the list item, or the product owner, the details page opens in view-only mode.

Edit List Page Fields

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

Follow these steps:

1. Click in a list page field to begin editing. If the field can be edited inline, it activates for you to change values.

   When you change a field value, a small red triangle appears in the upper left of the field indicating the updated value.

2. Save your changes.

Note: Fields that cannot be edited in-place include fields that have more than one value. If you sort or group by a column field with multiple values, the sort function sorts for each of the values in the column field. You cannot edit the value of the field in-place because the changes impact multiple objects.

Configure Columns for a List Page

You can choose the columns that display on some list pages. You can remove the default columns and add the columns that you want. If you add custom fields (also known as attributes), the custom fields are available to add to the appropriate list page as columns. For example, if you add custom fields for requirements, the custom fields will be available for the requirements list page.

Follow these steps:

1. Open the list page and click Configure.
2. Specify the columns that you want included in the list and the correct order.
3. Save your changes.

To restore configuration defaults for a list page, click Restore Defaults.

List Page Filters

List pages have a filter below the header that lets you control what you view on the page. All filters that are created for a list page appear in the Filters drop-down list for selection. The current filter in use on the list page shows in the Filters field.

Note the following points about filters:

- When you filter, the selection criteria remain in effect for the list page. If you leave the list page and return, the list is prefiltered with the selection criteria from the filter.
- Any filter that you create is automatically saved.
- You can edit and remove filters that you have created.
- To override the filter criteria for the list page and show the entire list, click Clear Filter.
- Filters are saved across sessions per browser. If you switch to a different browser, reselect a filter to apply it.

Manage a List Page Filter

List pages filter lets you control what you view on the page. Consider the following information about filters:

- When you filter, the selection criteria remain in effect for the list page. If you leave the list page and return, the list is prefiltered with the selection criteria from the filter.
- Any filter that you create is automatically saved.
- Filters are saved across sessions for each browser. If you switch to a different browser, reselect a filter to apply it.
- You can create and save multiple filters.
- To override the filter criteria for the list page and show the entire list, click Clear Filter.

Follow these steps:

1. Open the list page that you want to filter.
2. Click Add/Edit Filter.
3. Select the Create a new filter option.
4. In the Properties section, enter a name in the Filter Name field.
5. Make selections in the drop-down lists to define filter criteria.
6. Click Add to define additional criteria.
7. Click Filter when you are done.

   The list page is filtered using the criteria that you defined, and the filter is saved automatically.

Note: To edit or delete a filter, click Add/Edit Filter, select Show Existing Filters, edit the filter, or click Delete.

Chapter 3: Business Planning

Business planning for CA Clarity Requirements 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.

This section contains the following topics:

Example: Create a Persona and a Source

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

John receives market research that describes a typical buyer of a new product that he is planning. John receives an email from a sales representative indicating a current customer, Miki Wireless Devices, has expressed interest in the planned product. The customer has opened 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 CA Clarity Requirements:

- 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 CA Clarity Requirements, he selects the source Miki Wireless Devices to link the requirements to the requester. The new requirements can now be traced to Miki Wireless Devices as they go through the development cycle.

Because the requirements also fit the needs of the Charlie Smith persona 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 prioritizing which requirements are included in the scope.

Sources

You can define a profile for a source of a requirement. Sources let you trace requirements back to their origins. Knowing how many sources and who requested a requirement 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. CA Clarity Requirements 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.

You can define additional custom fields (attributes) for a source. The custom fields are helpful, when the default fields provided are not adequate for the information you want to collect and store for sources. Additional custom fields are added from the Administration menu.

See the *Administration Guide* for more information.

Manage a Source

Create a source to describe the originator of a requirement or an organization that is interested in having a requirement fulfilled.

Follow these steps:

1. Click Requirements, and from the Business Planning, click Source.

   The source list page appears.

2. Click New Source.
3. Complete the requested fields.

4. Save your changes.

After you create a source, you can edit the source to add more details.

Note: To edit or delete a source, select the source from the source list, and click Details.

Personas

A persona can be a real or a composite of a person who represents a buyer or influences the decision to buy a product.

Associating a persona with a requirement provides detailed information about who is expecting a requirement to complete and how the requirement fits into the business model for the person. A persona can provide information about the issues that the requirement satisfies including business needs, pain points, and buying habits.

Manage a Persona

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

Follow these steps:

1. Click Requirements, and from the Business Planning, click Persona.

   The persona list page appears.

2. Click New Persona.
3. Complete the appropriate fields.
4. Save your changes.

After you have created the persona, you can add more detail by editing the persona details.

Note: To edit or delete a persona, select the persona from the persona list, and click Details or Delete. You can click the Details link on the persona list, and edit the details on the Persona Details page. To delete a persona, click Delete from the Persona Details page or from the persona list.

Chapter 4: The Product Roadmap

The product roadmap displays the release time line for multiple products. The roadmap provides a view of master releases, with a high-level view and drill-down into releases and requirements. The monthly, quarterly, and yearly views show short-term and long-term implementation plans for delivering requirements and features.

From the roadmap, you can easily link to product, release, and requirement detail pages, to view, create, edit, clone, and delete objects. Once you configure the products to view on a roadmap, the settings are retained for subsequent views.

This section contains the following topics:

View Details for Items in the Roadmap

You can check the roadmap to view high-level information for an item, such as a release.

Follow these steps:

1. Click Requirements, and from the Business Planning, click Product Roadmap.
2. Click Filter Products, and select the products that you want to display.
3. Save your changes.

   The Product Roadmap displays information for all the selected products.
4. To view details for an item, choose one of the following options:
   - To view high-level information, hover over the object with the pointer.
   - To view the details of the release or requirement object in the Roadmap area, click the object.
5. To display nested items, expand master releases, products, releases, or features.

View Requirements Associated with a Product Release

You can view a list of requirements that are nested under a release. The Roadmap displays all the requirements regardless of its version status.

Note: If you have assigned a requirement to a feature, the Show Features option must be selected. Requirements that are not assigned to a feature are nested under "Unassigned".

Configure the Roadmap Display Options

You can configure color options for the roadmap objects to help distinguish between the types of objects.

Follow these steps:

1. Click Requirements, and from the Business Planning, click Product Roadmap.
2. Click Configure.

   The Configuration pop-up window appears.
3. Select the bar and text colors for each object type.
4. Save your changes.

View Products Associated with Master Releases

On the Product Roadmap, you can view the products that are associated with a master release. Hover over the master release object from the roadmap. The tooltip for the master release displays the associated product names.

Chapter 5: Product Setup

This section contains the following topics:

Manage a Product

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 strengths, weaknesses, opportunities, threats, and the problems that are addressed for the product.

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

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.

   The products list page appears.

2. Click New Product.

3. Complete the requested fields.

4. Save your changes.

Note: To edit or delete a product, select the product from the product list, and click Details or Delete.

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 change the product details. Only a current owner or the creator of a product can change the details of a product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.
2. Click Details in the Actions column for the product you want to work with.
3. Click Browse in the Product Owners field.
4. Select a new product owner.
5. Save your changes.

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 products.

To define a competing product, create a product and make sure the Competitor check box on the Product Details page is selected.

Create a Release or Requirement for a Product

You can associate an existing requirement or create a requirement for the product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.
2. Click Details for the product you want to work with.

   The Product Details page appears.
3. Click New in the Requirements section.
4. Complete the requested fields.
5. Save your changes.

Link to Quality Center Projects

If CA Clarity Requirements is configured to integrate with Quality Center, you can map a product to existing Quality Center project. The test cases that are associated with the Quality Center project get mapped to the product.

For more information integrating with Quality Center, see the *CA Clarity Agile Integration Guide*.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.

   The products list page appears.

2. Click New Product.
3. Complete the requested fields. The following fields require explanation:

   Map this product to

   Select an HP Quality Center project that you want to map.

   Note: This option is available only if the system administrator has enabled Integration with Quality Center from the Global Configuration Page.

4. Save your changes.

Link the Quality Center Test Cases to Requirement

If a product is mapped to the Quality Center project, you can link the test cases of the project to the requirement associated with the product.

If you delete a test case from a requirement in CA Clarity Requirements, the test case itself is not deleted from CA Clarity Requirements or Quality Center. Only the association between the test case and the requirement is broken.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.

   The requirements list page appears.

2. Click Details for the requirement you want to work with.

   Note: Link the requirement to the product which is mapped to the Quality Center project.

3. Scroll to the Test Cases section and click Link to Testcases.
4. Select a Quality Center folder to display the test cases in that folder.

   Note: A regular scheduled task syncs the Quality Center projects and test case data with CA Clarity Requirements. Any new test case on Quality Center will be available on CA Clarity Requirements only after the next successful execution of scheduled task.

5. Select one or more test cases.
6. Save your changes.

Planned and Actual Values

You can see planned and actual values for a product, release, or feature. The following values are displayed on the list pages and on individual detail pages:

- Planned Cost
- Actual Cost
- Planned vs Actual Cost
- Planned Effort
- Actual Effort
- Planned vs Actual Effort

This information is aggregated from the planned and actual values present for the requirements that are associated with the product, release, or feature. The aggregated values are read-only and cannot be edited.

Chapter 6: Releases

CA Clarity Requirements has the following release types:

- Product release

  This release type indicates an update or change to a product and therefore must be associated with a single product. If CA Clarity Agile is also used, any releases that are created also appear in CA Clarity Agile.

- Master release

  This release type can be associated with multiple products and their releases. When you assign a product release to a master release, all user stories and requirements within the release are automatically assigned to the master release.

  If the product is associated with the master release, you can associate individual user stories or requirements.

Note: For more information about master releases, including how to create a master release, see the *Administration Guide*.

This section contains the following topics:

Manage a Product Release

If you are the product owner or the system administrator, you can create a release for a product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Releases.

   The release list page appears.

2. Click New Release.

3. Complete the following fields:

   Target Cost

   Defines the total planned cost for the release. This value is a high-level estimate that can be entered and edited in CA Clarity Requirements. When CA Clarity PPM and CA Clarity Requirements are integrated, planned cost information comes from CA Clarity PPM and the field is read-only in CA Clarity Requirements. This field is a way to enter and track original rough estimates directly using CA Clarity Requirements.

   Target Effort

   Defines the total planned effort for the release in hours. This value is a high-level estimate that can be entered and edited in CA Clarity Requirements. When CA Clarity PPM and CA Clarity Requirements are integrated, planned effort information comes from CA Clarity PPM and the field is read-only in CA Clarity Requirements. This field is a way to enter and track original rough estimates directly using CA Clarity Requirements.

4. Save your changes.

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

Note: To edit or delete a product release, select the release from the release list, and click Details or Delete.

Associate a Product Release with a Master Release

Follow these steps:

1. Open the releases list page and click Details in the Actions column of the release you want to associate with a master release.

   The Release Details page appears.

2. In the Master Release field, select a master release.
3. Save your changes.

Set a Baseline for a Product Release

A baseline is a snapshot of requirements 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.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Releases.
2. Click Details in the Actions column for the release you want to work with.

   The Release Details page appears.
3. In the Baseline section, click New Baseline.

   Today's date and time are added to the record as the baseline date.

Compare Release Baselines

Any changes made to the requirements for a release after the baseline is created, do not appear under the current baseline. Create another baseline and you can do a comparison of the two baselines.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Releases.
2. Click Details in the Action column for the release you want to work with.

   The Release Details page appears.
3. In the Requirements section, highlight the two baselines you want to compare, and click Compare Baseline.

   The result shows a comparison of the requirements between the two baselines.

Chapter 7: Features

Features describe the abilities of the product. You can associate a feature with a single product when the feature is created. A feature can be linked to multiple requirements. You can view the planned and actual information for the feature requirements rolled up to the feature level.

This section contains the following topics:

Manage a Feature

You can create a feature to describe new functions and abilities of a product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Features.

   The features list page appears.

2. Click New Feature.

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

   Target Cost

   Defines the total planned cost for the feature. Target cost is a high-level estimate that can be entered and edited in CA Clarity Requirements. When CA Clarity PPM and CA Clarity Requirements are integrated, planned cost information comes from CA Clarity PPM and the field is read-only in CA Clarity Requirements. This field is a way to enter and track original rough estimates directly using CA Clarity Requirements.

Target Effort

Defines the total planned effort for the feature in hours. Target effort is a high-level estimate that can be entered and edited in CA Clarity Requirements. When CA Clarity PPM and CA Clarity Requirements are integrated, planned effort information comes from CA Clarity PPM and the field is read-only in CA Clarity Requirements. This field is a way to enter and track original rough estimates directly using CA Clarity Requirements.

4. Save your changes.

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

Note: To edit or delete a feature, select the feature on features list page, and click Details or Delete.

Add a Note or Attachment to a Feature

You can add notes to give additional information for the feature.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Features.
2. Click Details in the Actions column of the feature.

   The Feature Details page appears.

3. In the Notes & Attachments section, do one of the following:
   - Click New Note and complete the required fields. The following fields require explanation:

     Private

     Specifies only the creator can view or edit the note.

   - Click Attach File and browse the required file.
4. Save your changes.

View the Feature Hierarchy

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

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Features.

2. In the View field at the top of the list page, select Feature Hierarchy.

   The list of features displays with any associated requirements.

3. Click Expand All to display the requirements that are associated with the feature.

Planned and Actual Values

You can see planned and actual values for a product, release, or feature. The following values are displayed on the list pages and on individual detail pages:

- Planned Cost
- Actual Cost
- Planned vs Actual Cost
- Planned Effort
- Actual Effort
- Planned vs Actual Effort

This information is aggregated from the planned and actual values present for the requirements that are associated with the product, release, or feature. The aggregated values are read-only and cannot be edited.

Chapter 8: Managing Requirements

This section contains the following topics:

Requirements

You create requirements to identify and track needed abilities for the product.

Requirements that you create are listed on the Requirements list page. You can filter and sort the requirements to see only the information you want in the list. You can enter requirements in CA Clarity Requirements using one of the following methods:

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

You can view requirements for a specific product, release, and feature from the detail page for that object.

Requirements use version control to manage drafts and approved versions of a requirement. When you create and save a requirement, the Status field changes to Draft. The method for creating an approved version depends on whether Requirement Change Management (RCM), is enabled:

- If RCM is enabled, the requirement owner sends an approval request to the product owner. The product owner approves or rejects the requirement draft. If approved, the requirement state changes to Approved and the version number of the requirement increments.
- If RCM is not enabled, either the requirement owner or the product owner can create a new approved version. The status changes to Approved and the version number increments.

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 can view and edit individual requirements.

Requirement Hierarchy

Default view of the requirements list page. 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 stories that are 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 that is associated with the requirement through CA Clarity Agile.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
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. The requirement 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 CA Clarity Agile.

You can filter the Traceability Matrix requirements using the filter options. Click Add/Edit Filter to create a filter, specify the criteria, and click Filter to filter the view.

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.

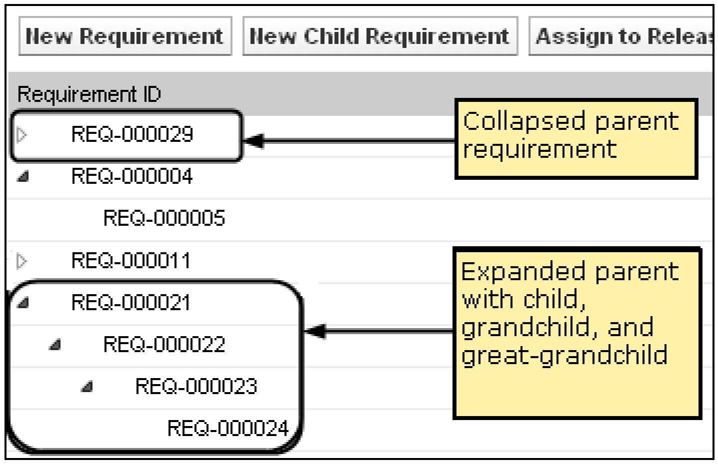
Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. In the View field, select Requirements Hierarchy.

From this list, you can perform the following tasks:

- Click in a field to update values in-line. The field activates if the value can be updated.
- Right-click on a requirement to see a menu to delete, expand, collapse, or edit details of the requirement.

You can create an unlimited number of levels in a hierarchy.



Example: Plan Feature Requirements Over Releases

Mark Wilson is the product owner for an existing Forward, Inc. flagship product. Mark owns 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 CA Clarity Requirements by sales, support, and marketing. He manages the requirements over a number of releases in the next fiscal year. To manage the requirements using CA Clarity Requirements, Mark does the following:

- Determines the product features to be implemented and creates the features in CA Clarity Requirements.

  Mark examines the current requirements to determine which features to implement and in what 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 Feature A cannot be completed in one release, and must be spread across multiple releases.

- Determines the number of releases required and creates the releases in CA Clarity Requirements.

  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. From the requirements list page, he makes the assignments by highlighting the requirements and clicking Assign to Release.

How to Work with Requirement Versions

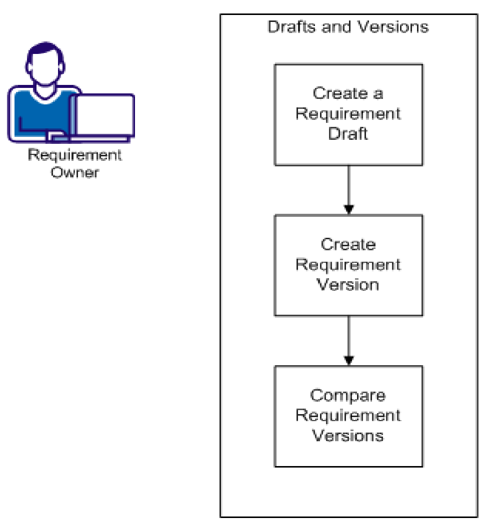
Version control provides you the ability to create drafts and current versions of requirements. When a CA Clarity Requirements user creates and saves a requirement, a draft of the requirement is added to the list of requirements. The user that creates the requirement becomes the requirement owner.

When the requirement owner becomes satisfied with the content of the requirement, they can create an approved version of the requirement. If Requirement Change Management is enabled, the requirement owner must submit the draft for approval to create an approved version.

When you have multiple versions of a requirement, you can compare differences between versions.

The following diagram shows how the requirement owner manages requirement versions.

Version Control for Requirements



To work with versions of requirements, complete the following tasks.

- Create a Requirement Draft (see page 44).
- Create a New Version of a Requirement (see page 41).
- Compare Requirement Versions (see page 42).

Create a Requirement Draft

You can create a draft of the requirement so that you can review it before creating a version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.

   The Requirements list page appears.

2. Click New.

   The New pop-up dialog opens to create a requirement.

3. (Optional) Click Configure to add more fields or change the order of columns in the requirement page.

   – Select the fields and layout.

   Note: You cannot configure some custom attributes including Email, Date/Time, Phone, Encrypt Text, Picklist (multi-select), Auto Number, Roll-up Summary, Lookup relations, URL, and Master-detail relationship.

4. Fill in the required fields.

   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.

   State

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

   Important! If you configure the optional fields after this step, all the populated details in the fields will be lost. Always configure the optional fields before completing the default fields.

5. Save your changes.

   The requirement is created. The status of the requirement is Draft.

Note: To delete the requirement, in the Requirement list, select the requirement that you want to delete, and click Delete.

Create a New Version of a Requirement

When you create a requirement, the Version Status is set to Draft. To create an approved version, you complete one of the following tasks:

- If Requirement Change Management (RCM) is enabled, submit an approval request (see page 44).
- If RCM is not enabled, create a version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details in the Actions column of the requirement you want to work with.
4. Click Create New Version.
5. Select which type of version to create:

   Minor

   Specifies a point (0.1) increase in the version number.

   Major

   Specifies a whole number (1.0) increase in the version number.

6. Click Create.

   The following fields or sections have updated values:

   Version Status

   The value changes from Draft to Approved.

   Current Version Number

   The value increases by a decimal point or whole number, which specifies a minor or major version type.

   Versions

   A record is added to the Versions section, with the new version number and a time stamp.

Compare Versions of the Requirement

You can compare versions of the requirement to check the changes in the new version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details for the requirement you want to work with.
4. Navigate to the Versions section and click Compare Versions.

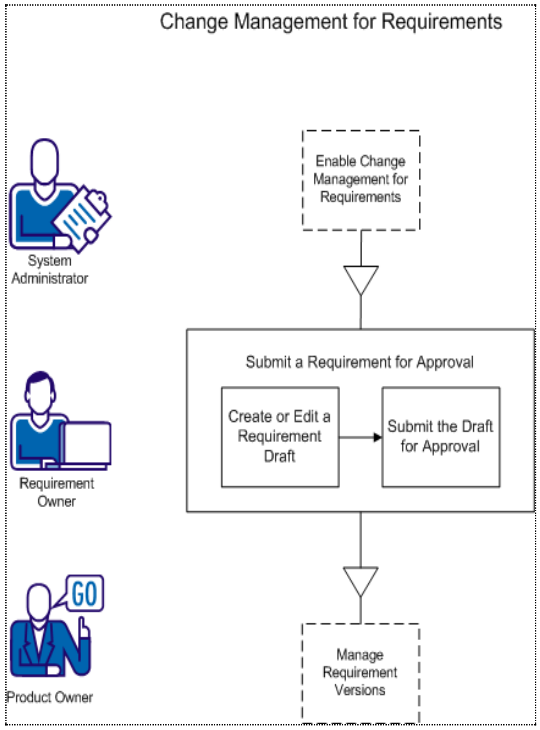
   The differences between the current version and the older version is shown.

How to Submit a Requirement for Approval under Change Management

With Version Control, requirements are in either a draft or approved state and the requirement owner can create an approved version. However, when Requirements Change Management (RCM) is enabled, the requirement owner must go through an approval process to create an approved version.

To change a requirement to approved, submit the draft for approval. The requirement status changes from the draft to submitted.

If the requirement is approved, the status of the requirement changes from submitted to approved.



You must be a valid CA Clarity Requirements user to create a requirement and submit it for approval.

1. Create or edit a requirement draft. (see page 44)
2. Submit a requirement draft for approval (see page 44).

Create or Edit a Requirement Draft

As a requirement owner, create a requirement draft or edit an existing draft.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Complete one of the following tasks:
   - Create a requirement draft (see page 40).
   - Edit the details of an existing requirement. (see page 48)

     When you edit and save the requirement, the status of the requirement changes to draft:
3. Complete the requested fields.
4. Save your changes.

   The requirement appears in the requirement list with *Draft* in the status column and is ready to be submitted for approval.

Submit a Requirement Draft for Approval

Once you have changed the requirement, you can submit it for approval.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details for the requirement you want to work with.
4. Review the draft, and when it is ready for approval, click Submit for Approval.

   The Submitting for Approval pop-up dialog opens.

5. Select one of the following Version Type options:

   Minor

   Specifies that the updates are small editorial changes or field changes such as entering the Actual Effort. The version changes by one point (0.1).

   Major

   Specifies that the updates are significant, such as changing the release associated with the requirement, changing the scope of the requirement, or increasing the complexity of the requirement. The version changes by one full version number (1.0).

6. Click Submit.

   In the Approval History section, an entry is added for the approval request. The status of the requirement is *Pending*.

   The product owner, receives an email notification about the request.

If the approver approves the requirement, the version number increases and the status changes to Approved.

If the approver rejects the requirement, the requirement remains in draft status without a change in the version number.

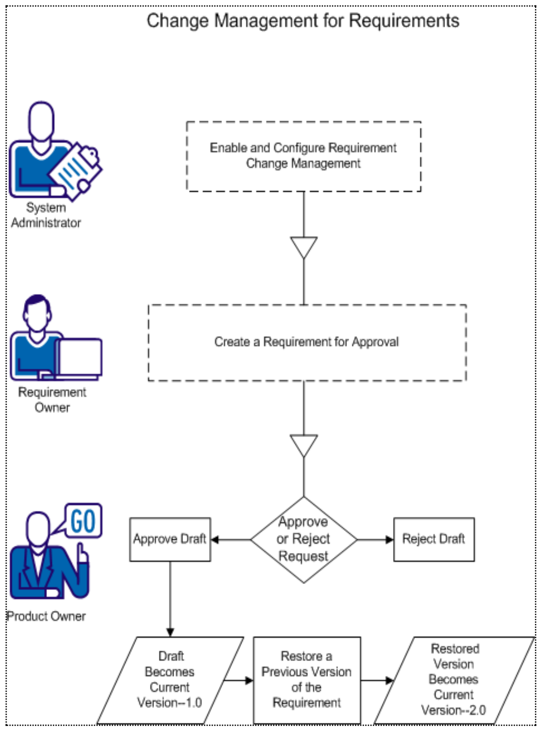
How the Product Owner Manages Requirement under RCM

You can use RCM to assist with version control and approval management for requirements. When change management is enabled and a team member creates a requirement, a draft version is created. The creator of the requirement is called the *requirement owner*. The requirement owner must be specified as a product owner to select the products for the new requirement.

After requirement owners create a requirement, they submit the requirement for approval to the product owner. The requirement changes from draft status to pending status until it is approved or rejected. A product owner approves, tracks, and restores versions of a requirement. After the product owner approves the draft requirement, the status changes to Approved, and the version number of the requirement increases.

The product owner can monitor requirement changes through Chatter updates.

The following diagram shows the process for managing the approval cycle.



Complete the following tasks to manage requirements under RCM.

- Approve or Reject Requirement Versions (see page 47).
- Restore a Previous Version of a Requirement (see page 48).

Approve or Reject Requirement Versions

After the requirement owner submits an approval request, the product owner receives an email indicating that a requirement needs approval. The email contains a URL link for the approval request.

The product owner reviews the request and either approves or rejects the requirement draft.

Follow these steps:

1. Click Requirements, Detailed Planning, click Requirements.
2. Click Details for the requirement you want to review.

   The Requirement Details page appears.

   Note: You can also click the link in the email and open the Requirement Details page.
3. Scroll to the Approval History section, and click Approve/Reject for the pending request.

   The Review Requirement page appears.
4. Click Approve or Reject.

   The status of the requirement updates depending upon whether the product owner approves or rejects the requirement. If the requirement is approved, the requirement has a status of Approved and a new version is created. If the requirement is rejected, the status appears as Draft and a new version is not created.

Restore a Previous Version of the Requirement under RCM

You can create a version of an approved requirement using the values from a previous version. This process is called restoring a version. You must have privileges of either a product owner or the requirement owner to restore a version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details for the requirement you want to work with.
4. Navigate to Versions list in the Requirement Details page.

   Tip: Click Compare Versions to check the differences between the current version and the older version.
5. Select the number of the earlier version and click Restore.

   The Restore pop-up dialog opens.
6. Specify the version type and click Restore.

   If you are the product owner, new version is created.
7. If you are the requirement owner, do the following:
   - Click Submit for Approval, if RCM is enabled.
   - Click Create New Version, if RCM is disabled.

When a new version is either created or approved, the requirement field values revert to the values of the previous version. Additionally, the version number increases by the specified number.

Edit Requirement Details

You can edit the details for a requirement.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details for the requirement you want to edit.
4. Complete the requested fields.

   When CA Clarity Requirements is integrated with CA Clarity PPM, the data comes from CA Clarity PPM and any manual edits is overwritten. You cannot edit the data.
5. Save your changes.

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. You can create an unlimited number of levels in a hierarchy.

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

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 CA Clarity Requirements, 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 of Business Requirement for the high-level requirements. She then selects the category of Technical Requirements for the child requirements under each high-level requirement. The system administrator configured the requirement categories to meet the needs of Forward, Inc. By selecting different categories for the parent and children, Carol can sort the requirements on the list page by category. She can also print the requirements 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 break down the high-level requirements into basic requirements. She creates children under the appropriate child requirements until she has reached the basic requirement level. The result is a requirement tree with five levels of child requirements. The IT department then assesses whether the requirements can be accomplished using the current system.

Create a Child Requirement

You can break the high-level requirements into smaller child requirements that describe the specific features and changes needed in the current system.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select the requirement that is to be the parent and click New Child.
3. (Optional) Click Configure to add more fields or change the order of columns in the requirement page.
   - Select the fields and layout.

   Note: You cannot configure some customer attributes including Email, Date/Time, Phone, Encrypt Text, Picklist (multi-select), Auto Number, Roll-up Summary, Lookup relations, URL, and Master-detail relationship.
4. Complete the required fields.

   Important! If you configure the optional fields after this step, all the populated details in the fields will be lost. Always configure the optional fields before completing the default fields.
5. Save your changes.

Edit Child Requirement Details

You can edit the details for a requirement.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select Requirement Hierarchy from the View drop-down list.
3. Expand the parent requirement to display the chid requirement.
4. Right-click the child requirement that you want to work with and click Details.
5. Complete the requested fields.

   Note: When CA Clarity Requirements is integrated with CA Clarity PPM, the data comes from CA Clarity PPM and any manual edits is overwritten. You cannot edit the data.
6. Save your changes.

How to View CA Software Change Manager Package Information

You can integrate with CA Software Change Manager (CA Software Change Manager) to view information about packages related to requirements.

Important:To integrate with CA Software Change Manager, the system administrator must enable integration with CA Software Change Manager.

After the integration has been enabled, you can perform the following tasks from a requirement:

- View CA Software Change Manager packages that are related to the requirement. (see page 51)
- Open the CA Software Change Manager Package Detail page (see page 52) to see high-level package information.

View CA Software Change Manager Packages

If the system administrator has enabled integration with CA Software Change Manager, you can view a list of packages related to a requirement. Packages appear in CA Software Change Manager section of the detail page.

The CA Software Change Manager section displays a list of packages with the following information:

Package Name

The name of the package associated with a requirement. The name has a link to the CA Software Change Manager Package Detail page for the package.

Click on the package name to view more detail about the package.

SCM Project

The name of the related project in CA Software Change Manager

Broker

The CA Software Change Manager broker

Created By

The user ID that created the package

View CA Software Change Manager Package Detail

The CA Software Change Manager Package Details page displays package history and code changes associated with a requirement. The information on this page is read-only.

You can link to this page from the CA Software Change Manager section in the detail page for the requirement.

The CA SCM Package History table displays the following information:

Action

The most recent activity that is performed on the package.

State

The current phase in the development lifecycle, such as "Development".

Modified By

The name of the user that last modified the module.

Date Changed

The date on which the module was last changed.

The SCM Code Changes table displays the following information:

Item Name

The name of the created item that is checked in to a CA Software Change Manager repository.

Path

The path of the item in the repository.

Version number

The iteration of an item in the repository.

Date Changed

The date on which the module was last changed.

Modified By

The name of the user that last modified the item.

Associate a Requirement with a Product Release

You can associate a requirement to the release.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select 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 that are associated with the requirement.
3. Select the appropriate release or releases to assign and click Add.

   The requirements are added to the selected releases. To verify, open the details page of one of the selected releases and check the Requirements section.

Associate a Requirement with a Master Release

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All Records from the View drop-down list.
3. Click Details for the requirement you want to work with.
4. Select the master release from the Master Releases field.
5. Save your changes.

Associate a Requirement with a Feature

You can assign a requirement to only one feature per product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select 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 that are associated with the requirement.
3. Select the appropriate feature or features to assign and click Add.

   The requirements are added to the selected features. To verify, open the details page of one of the selected features 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 Details, or Feature Detail page.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Product, Releases, or Features.
2. View the details for the specific product, release, or feature.
3. Scroll to the Requirements section and click New or New Child.
4. Complete the requested fields.
5. Save your changes.

Create a Requirement for a Source

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

Follow these steps:

1. Click Requirements, and from Business Planning, click Source.
2. Click Details for the source in the list you want.

   The Source Details page appears.
3. Scroll to the Requirements section and click New or New Child.
4. Complete the requested fields.
5. Save your changes.

Link Existing Requirements with a Product

You can link existing requirements with a product.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.
2. Click Details in the Actions column of the product you want to work with.
3. In the Requirements section, click Link Requirements.

   A list of available requirements appears.
4. Select the requirements that 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, 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 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 the parent or the 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 detail page.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select All records from the View drop-down list.
3. Select the requirements that you want to merge and click Merge.

   The merge page appears with the selected requirements listed.
4. Select 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 CA Clarity Requirements, regardless of any associations with products, releases, features, sources, or personas.
- Deleting a requirement from a product, release, or feature does not remove the requirement from CA Clarity Requirements.
- 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.

How to Estimate Resources and Effort for a Requirement

A requirement can have multiple resource roles. For example, a development requirement needs a manager role, a designer role, a developer role, and a quality assurance role. You can associate resource roles with a requirement and can estimate the amount of effort it takes for each role to complete the requirement.

For information about how to define roles for selection in CA Clarity Requirements, see the *Administration Guide*.

To estimate the resources and effort for a requirement, you must:

1. Add a resource role for the requirement (see page 57).
2. Estimate the effort for a resource role (see page 57).

Add a Resource Role for a Requirement

You can add resource roles that are required to complete the requirement. You can add roles only if you are the requirement owner.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select the requirement and click Details.

   The Requirement Details page opens.
3. In the Role section of the detail page, click Add Role.

   The Select Roles window appears.
4. Select the roles that you want to add for the requirement and click Add.

   The roles appear in the Roles section list for the requirement.

Estimate the Effort for a Resource Role

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Select the requirement and click Details.

   The detail page for the requirement opens.
3. In the Role section, locate the role and click in the Labor Effort column on the row, then enter the full-time estimated hours.

   A red arrow appears in the upper left of the Labor Effort cell, indicating an editing change has been made but not saved.
4. Save your changes.

Attach a Note or Attachment to a Requirement

You can add notes to give additional information for the feature.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click the title of the requirement you want to work with.

   The Requirement Details page appears.

3. In the Notes & Attachments section, do one of the following:
   - Click New Note and complete the requested fields. The following fields require explanation:

     Private

     Specifies only the creator can view or edit the note.
   - Click Attach File and browse the required file.
4. Save your changes.

Track Requirements with Charts and Reports

You can track your requirements through predefined charts and reports. These charts are available on the Salesforce.com CA Clarity Public Dashboard.

Follow these steps:

1. Log in to CA Clarity Requirements and click Setup.
2. Click the Dashboards tab.

   The dashboard appears. If the CA Clarity Requirements dashboard is not visible, click Go to Dashboard List, under the dashboard title. The CA Clarity Public Dashboard appears.
3. Select Requirements Dashboard.

   The dashboard appears with the following charts:
   - Requirements - State Bar Chart
   - Requirement - Product Pie Chart
   - Requirement - Average Age Line Chart
   - Requirement - Release Pie Chart
   - Requirement - Trend Line Chart
   - Requirement - Source Pie Chart
4. Click the chart to view options for generating a report.

You can modify the criteria for the report with selections from the Summarize information by and Show lists. You can also specify time ranges. See the page help to learn more about the dashboard.

Best Practice: If you plan to customize the report or chart, create a custom dashboard and report to avoid impacting other users. See the Salesforce.com page help to learn more.

Chapter 9: Chatter

This section contains the following topics:

Chatter

Chatter lets you communicate with others in your organization and exchange information in real time. Using Chatter, you can do the following:

- View your information, status updates of people you follow, updates to records you follow, and updates to groups in which you are a member.
- Create a chatter group that allows members to post updates and communicate with each other privately.
- Add attachments or links to a posting.
- Determine whether you want to follow a user or a record that has been enabled for Chatter.

You can modify the Chatter setup. For complete information about using Chatter, see the *Salesforce.com Help & Training.* This documentation is available if you click the Setup link to bring up Personal Setup. Then click the Help link.

Turn Following On or Off

You can follow information about the following CA Clarity Agile or CA Clarity Requirements items using Chatter:

- Products
- Releases
- Requirements
- Features
- Sources
- User stories
- Tasks
- Issues

The Following option is enabled by default for items that you create. If you are not the creator of an item, the Following option is deactivated. But you can manually activate it.

You can tell if an item is followed by looking at the Following column on the list page.

Follow these steps:

1. Open the appropriate list page and locate the specific item in the list.
2. In the Follow column of the list item, choose one of the following options:
   - To follow the list item, click the green icon to the left of the word Follow.
   - To turn off the Following option for the list item, click the icon to the right of the word Following.

How to View Different Types of Chatter Information

Chatter is available for both CA Clarity Agile and CA Clarity Requirements. The Chatter information that you view in either of these products pertains only to that product. The product supports the following Chatter information types:

- View Chatter for all of the items that you follow. (see page 60)
- View Chatter activity for an item. (see page 60)

View Chatter for all Items that You Follow

The Chatter page lists the consolidated activity on all the items that you follow in either CA Clarity Agile or CA Clarity Requirements.

Follow these steps:

1. Go to the Requirements or Agile menu, depending on the Chatter information you want to view.
2. With the menu displayed, select Chatter from the Overview menu.

   The complete list of Chatter activity for the items you follow appears.

View Chatter Activity for an Item

A Chatter Feed is available from the detail page of an item, such as a requirement or user story. The Chatter activity is specific to the selected item.

Follow these steps:

1. Open the detail page of an item (for example, a specific requirement in CA Clarity Requirements or a specific user story in CA Clarity Agile).

2. In the View field, select Chatter Feed.

   Chatter activity for the item appears.

Chapter 10: Using CA Clarity Requirements with CA Clarity Agile

This section contains the following topics:

Using CA Clarity Requirements with CA Clarity Agile

If you are using CA Clarity Agile with CA Clarity Requirements, you can complete the following CA Clarity Agile tasks while working in CA Clarity Requirements:

- Create an epic (see page 64)

  You can create an epic from the Requirement Detail page, or link an existing CA Clarity Agile epic to a requirement. Epics help group requirements into larger categories, such as "User Interface" or "Managing a Scrum Team".

- Create a sprint (see page 65)

  You can create a sprint from the Release Detail page. When you create a sprint and populate the necessary fields in CA Clarity Requirements, the sprint detail opens in CA Clarity Agile so that you complete user stories.

- Create a team (see page 66)

  You can create a scrum team from the Product Detail page. You can specify key information such as the team name, expected velocity, story point scale, and meeting details.

  If you create a team in CA Clarity Requirements, you can open CA Clarity Agile and go to the Teams list page and find the team.

- Create a user story (see page 67)

  From the Requirement Detail page, you can create a user story for that requirement. You can also link existing user stories.

- Create a task (see page 68)

  You can create tasks for a CA Clarity Agile user story from the User Story Detail page.

Epics

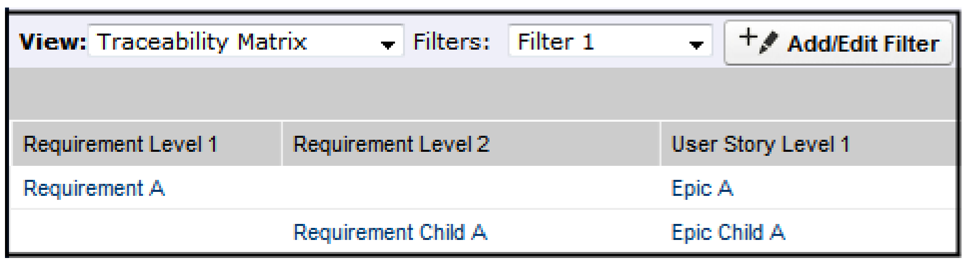
You can create an epic and link it to a specific requirement in CA Clarity Requirements.

The following statements apply to epics created in CA Clarity Requirements:

- The epic must be associated with the same product, release, and sprint as the requirement.
- Epics created in CA Clarity Requirements are included in CA Clarity Agile and can be viewed and edited from that product.
- Epics can have associated user stories.

The following illustration shows parent and child requirements with their associated user stories in the Traceability Matrix.

Equation 1: Requirements and epics are displayed in parent and child relationships



Requirements and epics are defined by levels to indicate parent-child relationships, so that the epic is shown in the same level as its associated requirement.

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

Create Epics

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.
3. Scroll down to the User Stories and Epics section and click New Epic.

   The New Epic pop-up dialog opens.
4. Complete the requested fields.
5. Save your changes.

You can also link epics to child requirements by clicking the name of the child requirement to open the detail page. Use the same method to link an epic.

Link an Epic to a Requirement

You can link an existing epic from CA Clarity Agile to a requirement.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.
3. Scroll down to the User Stories and Epics section, and click Link User Story/Epic.

   The Link User Story/Epic pop-up dialog opens listing user stories and epics that are associated with the current product.
4. Select an epic.
5. Save your changes.

   The epic is listed in the list of User Stories and Epics.

You can also link epics to child requirements by clicking the name of the child requirement. Use the same method to link an epic.

Create a Sprint

You can create a sprint from the Release Details page for a specific release.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Releases.
2. The release list page appears.
3. Select the release and click Details.

   The Release Details page appears.
4. In the Sprints section, click New Sprint.
5. Complete the required fields.
6. Save your changes.

   The Sprint Backlog & Charts page appears.

Create a Team

You can create a scrum team in CA Clarity Requirements for a product. As you create the team, the information is shared with CA Clarity Agile and the team appears in the product team listings.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.

   The products list page appears.

2. Select the product that you want to create a team for and click Details.

   The Product Details page appears.

3. In the Teams section, click New Team.
4. Complete the requested fields.
5. Save your changes.

Add a Member to a Team

You can add members to a team from the Product Details page.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.

   The products list page appears.

2. Select the product and click Details.

   The Product Details page appears.

3. In the Teams section, click the name of the team to display the Team Details page.
4. In the Team Members section, click New Scrum Team Member.

   The Team Member Edit page appears.

5. Complete the requested fields.
6. Save your changes.

User Stories

When you create a user story for a requirement in CA Clarity Requirements, the two are linked.

The following statements apply to user stories created in CA Clarity Requirements:

- The user story must be associated with the same product, release, and sprint as the requirement.
- User stories created in CA Clarity Requirements are included in CA Clarity Agile 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.

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.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.

   The Requirement Details page appears.
3. In the User Stories section, click New User Story.
4. Complete the requested fields.
5. Save your changes.

Edit User Story Details

To complete information for a user story in CA Clarity Requirements, open the User Story Details page.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.

   The Requirement Details page appears.

3. In the User Stories section, click Details next to the name of the user story.

   The User Story Details page appears.

4. Modify the required fields.

5. Save your changes.

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.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.
3. In the User Stories section, click Link User Story.
4. Select the requirement that you want to link to and click Save.

After you link an existing user story, you can see whether the user story has dependencies in the Flags column. Additionally, you can view and edit the user story details.

Create a User Story Task

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.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click a requirement to open the Requirements Details view.
3. In the User Stories section, click Details next to the name of the user story.

   The User Story Details page appears.

4. In the Tasks section, click New Task.
5. Complete the requested fields.
6. Save your changes.

Add a Note to a User Story

You can add notes to user stories to document information about it.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click the title of the requirement you want to work with.

   The detail page appears.
3. In the User Stories section, click Details next to the name of the user story.

   The User Story Details page appears.
4. In the Notes & Attachments section, do one of the following:
   - Click New Note and complete the requested fields. The following fields require explanation:

     Private

     Specifies only the creator can view or edit the note.
   - Click Attach File and browse the required file.
5. Save your changes.

Link an Issue with a User Story

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

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click the title of the requirement you want to work with.

   The Requirement Details page appears.
3. In the User Stories section, click Details next to the name of the user story.

   The User Story Details page appears.
4. In the Issues section, click Link to Issue.

   The Link to Issue window appears.
5. Enter the first letter of the issue name to display a list of the issues that are in CA Clarity Agile and select the appropriate issue.
6. Save your changes.

Add a Comment to a User Story

You can create comments for the user story to document information related to it.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click the title of the requirement you want to work with.

   The Requirement Details page appears.
3. In the User Stories section, click Details next to the name of the user story.

   The User Story Details page appears.
4. In the Comments section, click New Comment.
5. Enter your comment in the Comment text box.
6. Save your changes.

Example: Connect Traditional Requirements to Agile Development

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

In CA Clarity Requirements 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.

The development team is using CA Clarity Agile. When Karen creates a user story, it shows up in the backlog for the product, tagged to the correct release in CA Clarity Agile.

When Karen completes the user story creation exercise, she returns to the CA Clarity Requirements 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 11: Using CA Clarity Requirements with CA Clarity Ideation

This section contains the following topics:

About Using CA Clarity Requirements with CA Clarity Ideation

Ideas are created in a CA Clarity Ideation community and appear in read-only format in CA Clarity Requirements. You cannot edit the properties of an idea in CA Clarity Requirements. You can link an idea to a product, requirement, or source.

Ideas displays in the following ways in CA Clarity Requirements:

- All ideas entered in CA Clarity Ideation appear in the Inbox list, with the community source name in the Type column.

  CA Clarity Ideation - *community_name* Community

  Displays the name of the CA Clarity Ideation community.

  For example: CA Clarity Ideation - Agile Community

- Ideas that are linked to a requirement, product, or source appear on the detail pages for the requirement, product, or source.

You can link products and requirements to ideas in CA Clarity Ideation. Note the following rules:

- An idea can be linked to multiple products.
- A product can be linked to multiple ideas.
- An idea can be linked to multiple requirements.

View Details of an Idea

Follow these steps:

1. Click Requirements, from Overview, click Inbox.

   The list of inbox items appears showing ideas entered in CA Clarity Ideation.

2. Locate the idea whose details you want to view and click Details.

   The detail page for the idea you selected appears. From this page you can view CA Clarity Requirements products, requirements, or sources that are linked to the idea. You can also click a link to see the detail page in CA Clarity Ideation.

Create and Link a Requirement to an Idea

Follow these steps:

1. Click Requirements, from Overview, click Inbox.

   The list of inbox items appears showing ideas entered in CA Clarity Ideation.

2. Select the idea in the list that you want to create a requirement for and click New Requirement.

   The requirements list page appears.

3. Complete the requested fields.

4. Save your changes.

Link an Existing Requirement to an Idea

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

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.

2. Click a requirement to open the Requirements Details view.

   The detail page appears.

3. In the Inbox Items section, click Link to Inbox Item.

   A list of inbox items that are linked to the requirement's product appears.

4. Select the ideas to link to the requirement and click Add.

Link a Product to an Idea

You can link a product to more than one idea.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Products.

   The products list page appears.

2. Click Details in the Actions column of the product.

   The detail page appears.

3. In the Inbox Item section, click Link to Inbox Item.

   The list of inbox items available from CA Clarity Ideation appears.

4. Select the ideas to link to the product and click Add.

Link a Source to an Idea

Follow these steps:

1. Click Requirements, and from the Business Planning, click Source.
2. Click Details in the Actions column of the source.

   The Source Details page appears.

3. In the Inbox Items section, click Link to Inbox Item.

   A list of inbox items appears.

4. Select the ideas to link to the source and click Add.

Chapter 12: CA Clarity Requirements Access Rights

The following user profiles are available with CA Clarity Requirements:

Super User

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

- Add users

- Configure CA Clarity Requirements setup

Product Owner

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

- Release
- Features
- Requirements
- Sprint
- User Stories

The product owner cannot create products or add Agile/Requirements users.

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

If you are using CA Clarity Agile with CA Clarity Requirements, you must be assigned to a product to view any CA Clarity Agile page. You can do the following tasks from the Agile menu:

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

Appendix A: Glossary

Category

A *category* is way to classify a requirement. You define requirement categories for your organization specific to your enterprise needs. Examples of categories include: Market Requirements, Technical Requirements, Functional Requirements and Nonfunctional 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. You can use the competing product as a source of requirements.

Epic

An *epic* acts as a parent container for multiple child user stories that span multiple releases and sprints in a product. You can link epics to requirements to provide traceability and to help with the planning process.

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. The description of a user, customer, buyer, or other individual who can 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 a company produces 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.

Product Owner

The scrum team member that is listed as the product owner in the properties of a product.
The product owner has privileges over all objects that are associated with the product, such a requirements, releases, sprints, and backlog items. The product owner does not need to be a scrum team member to work with user stories associated with the product.

Release

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

Requirement

A *requirement* is a documented specification that describes a particular product or service and what it can be or do. 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 CA Clarity Agile. If these products are used together, a requirement in CA Clarity Requirements can be linked to its associated user story in CA Clarity Agile.