CA Clarity Agile and CA Clarity Requirements

Scenarios 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
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- Product and documentation downloads
- CA Support policies and guidelines
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Chapter 1: Introduction

CA Clarity Agile enables customers to manage projects that follow the Agile methodology in an intuitive and simple manner. Agile teams can plan product releases based on date, demand, and capacity. CA Clarity Agile is web-based, so team members can participate in sprint planning, view, and update status from wherever they are located.

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 and 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.

This section contains the following topics:

About this Guide

This guide describes some typical project and requirements planning scenarios and how CA Clarity Agile and CA Clarity Requirements help you resolve them. After you read this chapter, read each scenario that is appropriate for your role. You do not have to read all of the chapters in the presented order.

To help illustrate the scenarios, a fictitious company named Forward Inc. is used throughout this guide.

Legal Notices

Forward Inc. is a fictitious company name which use is strictly for instructional purposes only and is not meant to reference an existing company.

Audience

This guide is intended for all CA Clarity Agile and CA Clarity Requirements roles, including:

- Product Owners
- Requirement Owners
- Scrum Masters and Team Members
- System Administrators

Chapter 2: Product Owner Scenarios

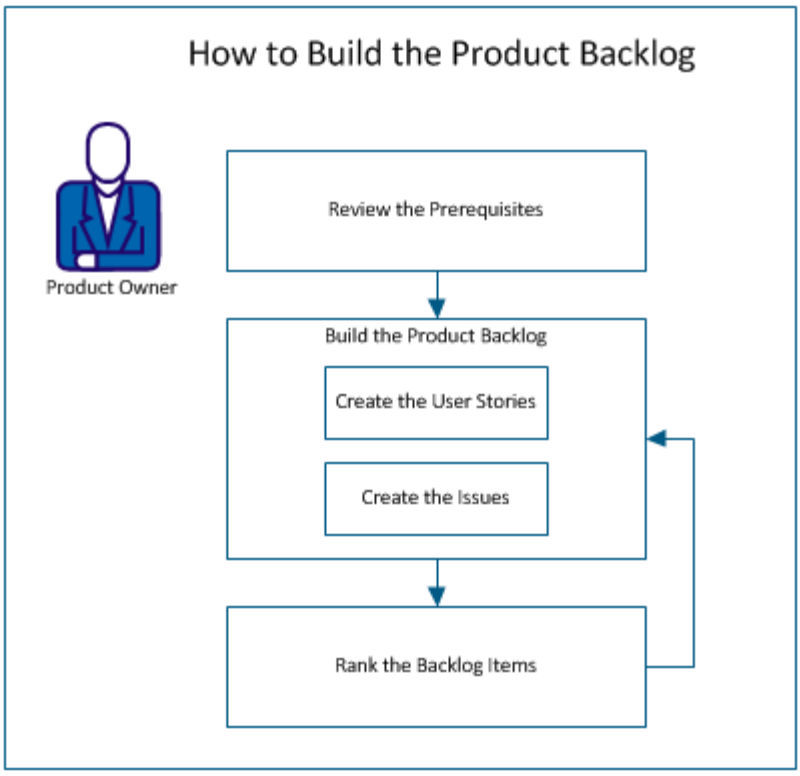
This section contains the following topics:

How to Build the Product Backlog

Building a product backlog is a continuous process of collecting requirements, customer feedback, and open defects for the product. The product owner builds and manages the product backlog regularly by receiving feedback from customers and understanding their requirements.

For example, for a product Parking Pass Management System, the requirements include the online purchase of passes and payment modes to purchase the passes. These requirements are the backlog items for the product.

The following diagram describes how a product owner builds the product backlog.



Perform these steps to build the product backlog:

1. Review the Prerequisites (see page 12)
2. Build the Product Backlog
   - Create the User Stories (see page 12)
   - Create the Issues (see page 12)
3. Rank the Backlog Items (see page 13)

Review the Prerequisites

Before you build the product backlog, verify that the product is set up in CA Clarity Agile. The product acts as a placeholder to capture all the required features. For example, Parking Pass Management System is the name of the product. Any required feature or issue for this product is added under it.

Create the User Stories

Create a user story to track the work that is associated with the requirement. A user story describes a feature or functionality requirement for the product. Include enough information in the user story for the team to provide an estimate of the work effort that is required to implement it.

For example, for the product Parking Pass Management System, create a user story named Pay Parking Pass by Credit Card. Include details of the requirement in the user story, such as mask the field for card security code.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New User Story.
4. Complete the required information.
5. Save your changes.

Create the Issues

You can add issues to the backlog items to track the work that is associated with fixing defects. Defects are the bugs in the product that are observed when using the product. For example, create an issue Unable to Send the Parking Pass Expiration Message. Provide details of the issue such as steps to reproduce the issue and the expected results.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New Issue.
4. Complete the required fields.
5. Save your changes.

Rank the Backlog Items

Ranking backlog items in the order in which you want the work completed helps to plan the backlog items for a release. The values in the Rank # column in the backlog list indicate the order of work.

For example, rank the user story “Pay Parking Pass by Credit Card” higher than the user story “Pay Parking Pass by PayPal”.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Enable Ranking, if you do not see the Rank # column.

   Note: This button is hidden if the Rank # column is visible.
4. Click the Rank # field for the user story or issue, and enter the new rank number.

   The backlog item is moved to the new place in the list.

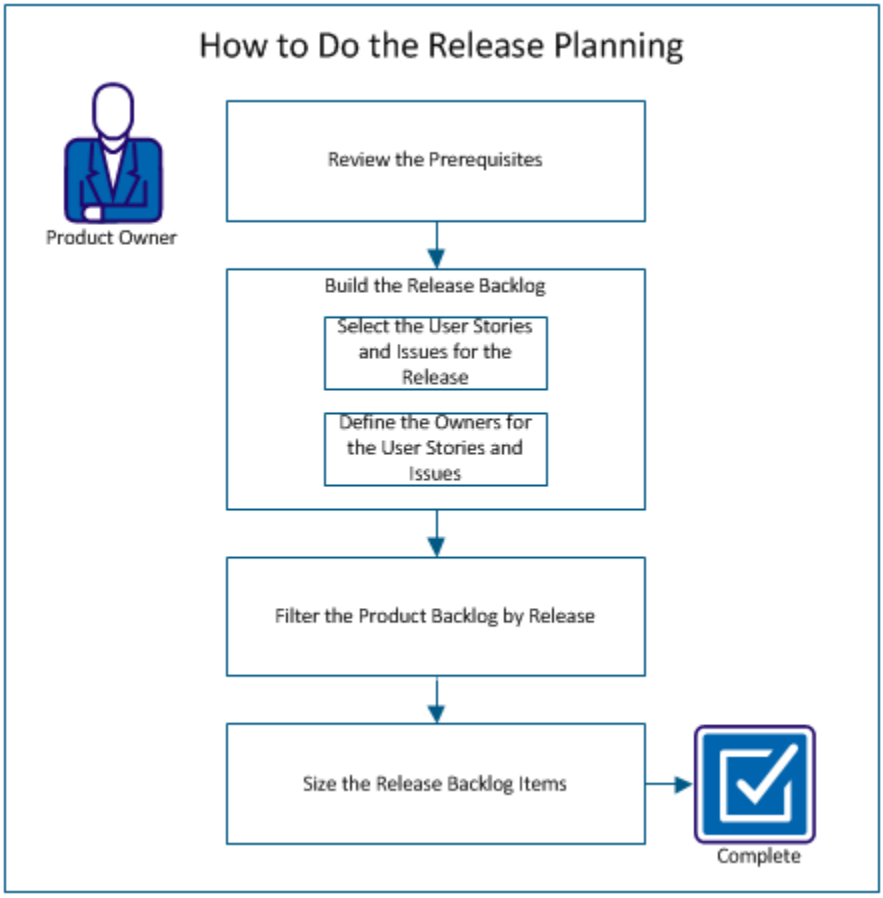
Note: You can also rank backlog items by dragging and dropping them in the required order.

You have successfully built the product backlog. Repeat the scenario to add more user stories and issues. As you add more items to the product backlog, you can change their ranking in the order in which you want the work completed.

How to Do the Release Planning

The release planning involves building the release backlog. The product owner identifies the high ranking product backlog items to build the release backlog. The product owner then discusses the release backlog items with the team.

The following diagram describes how a product owner performs the release planning.



Perform these steps to plan a release:

1. Review the prerequisites (see page 15).
2. Build the release backlog.
   - Select the user stories and issues for the release (see page 15).
   - Define the owners for the user stories and issues (see page 16).
3. Filter the product backlog by release (see page 16).
4. Size the release backlog items (see page 17).

Review the Prerequisites

To do the release planning, verify that the following items are set up in CA Clarity Agile:

- The product backlog.
- The release.

Select the User Stories and Issues for the Release

The product owner identifies the high ranking product backlog items for the release and discusses the items with the team. For example, in the Parking Pass Management System, the product backlog includes the following items:

- Purchase parking pass online
- Pay parking pass by credit card
- Pay parking pass by PayPal
- Add photo identity to parking pass

The product owner can identify the first three items in the ranking order and can associate them to the release.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Choose one of the following options:
   - Select a user story or issue, and choose one of the following actions:
     - Click Details, and select the release name.
     - Click in the Release column, and select the release name.
   - Select multiple user stories or issues, and choose one of the following actions:
     - Right-click the selected items, click Bulk Update, and select the release name from the drop-down list.
     - Click Bulk Update, and select the release name from the drop-down list.
4. Save your changes.

Define the Owners for the User Stories and Issues

The owner of a user story or issue is responsible for completing the work that is associated with the story. You can assign a user story or issue to more than one owner.

For example, Pay Parking Pass by Credit Card user story can be assigned to two software programmers. The two programmers work together to complete the user story. While one programmer writes the code for the feature, the other programmer reviews the code, and they switch roles frequently.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select the user story and click Details.
4. Select owners of the user story.
5. Save your changes.

Filter the Product Backlog by Release

Filter the product backlog page to display the user stories and issues that are associated with the release. For example, in the Parking Pass Management System, filter the backlog page to display only the items that are identified for the release:

- Purchase parking pass online
- Pay parking pass by credit card
- Pay parking pass by PayPal

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Add/Edit Filter.
4. Select Create a new filter.
5. Enter the Filter Name to identify the release.
6. Select the appropriate values from the drop-down list to define the filter criteria for the release.
7. Click Filter.

   The backlog page is filtered to display the release backlog.

Size the Release Backlog Items

Sizing helps you understand the effort that is required to complete a user story. You use points as the unit to estimate the relative size of stories.

For example, the Purchase parking pass online user story takes more effort to complete than Pay parking pass by credit card user story. Assign more points to Purchase parking pass online.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Select the user story and click Details.
4. Enter the points.
5. Save your changes.

Note: You can also edit the points inline on the backlog page to estimate the relative size of stories.

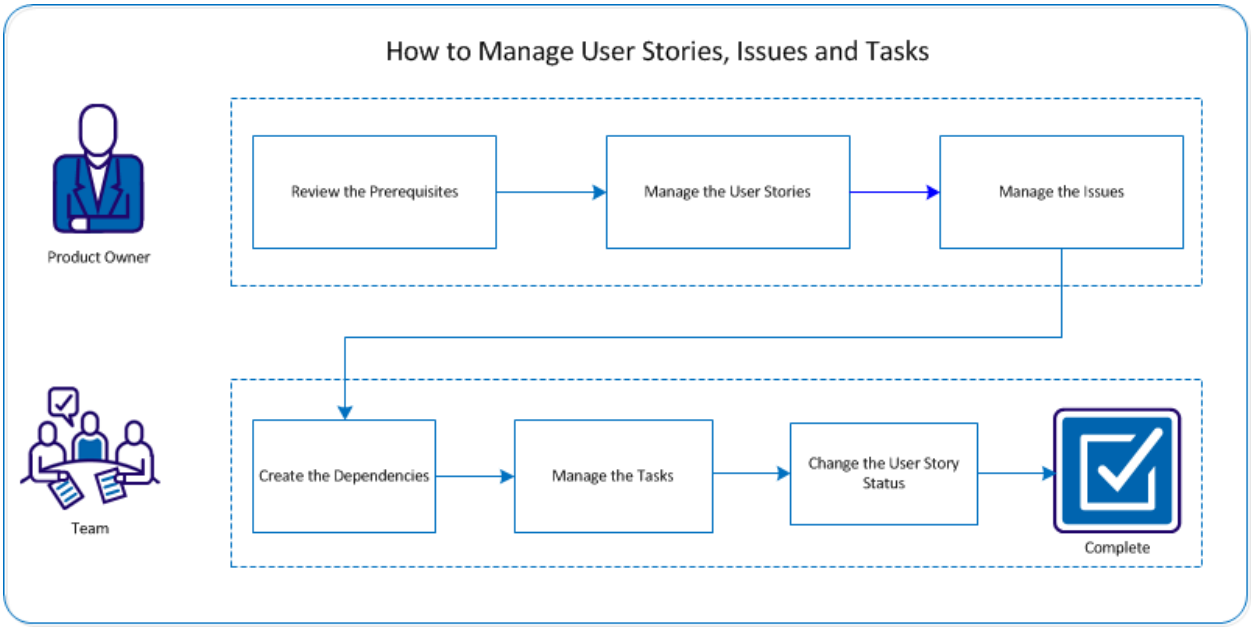
You have successfully completed planning a release. The team can now use the release backlog to build the sprint backlog.

How to Manage User Stories, Issues, and Tasks

User stories and issues are the requirements, feedback, and open defects for the product, which the product owner regularly receives from the customers. The team works on the user stories and issues to enhance the product functionality.

For example, for a product Parking Pass Management System, the requirements include the online purchase of passes and payment modes to purchase the passes. These requirements are added as user stories.

The following diagram describes how a product owner and team members manage user stories, issues, and tasks.



To manage user stories, issues, and tasks, perform these steps:

1. Review the prerequisites (see page 19).
2. Manage the user stories (see page 19).
3. Manage the issues (see page 19).
4. Create the dependencies (see page 20).
5. Manage the tasks (see page 20).
6. Change the user story status (see page 23).

Review the Prerequisites

Before you manage the user stories, issues, and tasks, verify that the product you are developing is set up in CA Clarity Agile. Your product acts as a placeholder to capture all of the required features. For example, Parking Pass Management System is the name of the product. Any required feature or issue for this product is added under it.

Manage the User Stories

As a product owner, you can create a user story to track the work that is associated with the requirement. A user story describes a feature or functionality requirement for the product. You should include the necessary information in the user story for the team to provide an estimate of the work effort that is required to implement it.

For example, for the product Parking Pass Management System, create a user story named Pay for parking pass by credit card. Include details of the requirement in the user story, such as mask the field for card security code.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click New User Story.
4. Complete the required information.
5. Save your changes.

Note: To edit or delete a user story, select the user story from the Backlog page, and click the Details link or Delete.

Manage the Issues

As a product owner, you can add issues to track the work that is associated with fixing defects. Defects are the bugs in the product. For example, create an issue Unable to send the Parking Pass Expiration message. Provide details of the issue such as the steps to reproduce the issue and the expected results.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.

3. Click New Issue.
4. Complete the required fields.
5. Save your changes.

Note: To edit or delete an issue, select the issue from the Backlog page, and click the Details link or Delete.

Create the Dependencies

The team members can create dependencies for a user story to identify the requirements that a user story has on another story. For example, create a user story I can choose a payment method on the payment page. Add this user story as a dependency for the user story I can pay for parking pass by credit card.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story for which you want to create a dependency.
4. In the Dependencies for this User Story section, click New Dependency.
5. Complete the required informatiion.
6. Save your changes.

   The user story detail updates to reflect the dependency details.

After you create a dependency, the details page for the other user story displays information about the relationship in the Dependencies section.

Manage the Tasks

Tasks are work items that one or more team members perform. A user story or an issue is broken down into one or more tasks. When you change the status of a task to Closed, the remaining hours on the task become zero.

For example, for the user story As a commuter, I want to pay for a parking pass by credit card, you can break down the work into two tasks:

- Create the interface.
- Test the interface

Estimate two hours to create the interface and one hour to test the interface.

As a team member, you can create and manage tasks from the following pages:

- Sprint Backlog & Charts
- Kanban Backlog & Charts
- User Story Details
- Virtual Wall

Create Tasks from the Sprint Backlog & Charts Page

If the user story or issue is assigned to a sprint, you can create a task on the Sprint Backlog & Charts page.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the user story or issue for which you want to create a task.
3. Click New Task.
4. Complete the required information.
5. Save your changes.

Note: To edit or delete a task, from the Sprint Backlog & Charts page, expand the user story, select the task, and click Details or Delete.

Creates Tasks from Kanban Backlog & Charts page

If the user story or issue is assigned to a Kanban Board, you can create a task on the Kanban Backlog & Charts page.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Backlog & Charts.
2. Select the user story or issue for which you want to create a task.
3. Click New Task.
4. Complete the required information.
5. Save your changes.

Note: To edit or delete a task, from the Kanban Backlog & Charts page, expand the user story, select the task, and click Details or Delete.

Create Tasks from the User Story Details Page

You can create tasks from the User Story Details page.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details for the user story for which you want to create a task.
4. Click New Task.
5. Complete the required information. The following fields require explanation:

   Estimated Hours

   Defines the number of hours that are estimated to complete the task and includes hours that are already logged for the task.

   Hours Worked

   Displays the total hours that are logged for the task.
6. Save your changes.

Note: To edit or delete a task, from the User Story Details page, select the task, and click Details or Delete.

Create Tasks on the Virtual Wall

You can create new tasks on the Virtual Wall while managing the assigned tasks.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Virtual Wall.
2. Select the product, release, and sprint from the drop-down lists.

   The Virtual Wall shows task cards for different user stories for the selected sprint.
3. Click New Task for the user story to which you want to add a task.
4. Complete the required information.
5. Save your changes.

   A new task card is added to the user story.

Note: To edit or delete a task, from the virtual wall, click the task name on the task card, and edit or click Delete.

Change the User Story Status

Team members change the status of user stories to indicate the progress of the project. When the tasks that are associated with the user story are complete, team members can change the status of the user story to communicate the completion of work.

For example, when you completed the tasks associated with the user story As a commuter, I want to pay for a parking pass by credit card, you can mark the status of the user story as complete.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Details link for the User Story you wish to update.
4. Change the status of the user story.
5. Save your changes.

You have successfully managed user stories, issues, and tasks to improve the product.

Chapter 3: Requirement Owner Scenarios

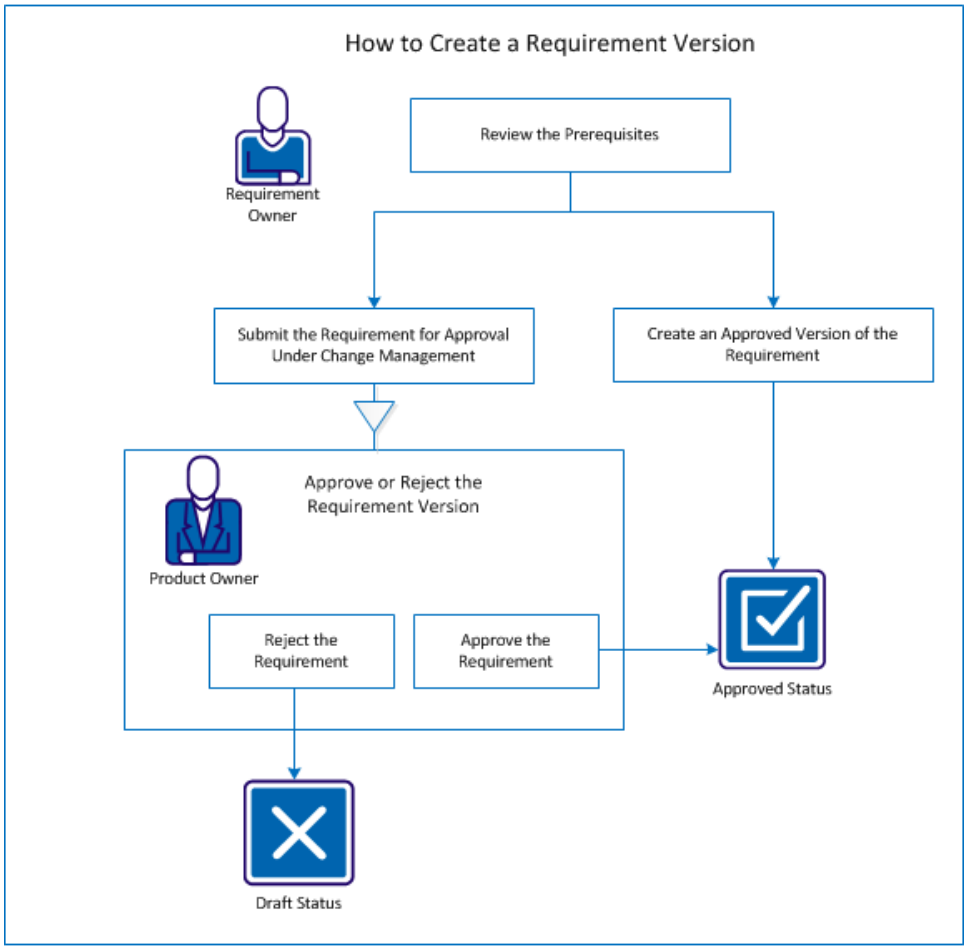
This section contains the following topics:

How to Create a Requirement Version

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. Version control enables you to create drafts and approved versions of requirements.

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 (RCM) is enabled, the requirement owner must submit the draft for approval to create an approved version.

The following diagram describes how a requirement owner creates a requirement version.



Perform these steps to create a requirement version:

- Review the prerequisites (see page 27).
- If RCM is not enabled:
  - Create an approved version of the requirement (see page 27).
- If RCM is enabled:
  - Submit the requirement for approval under change management. (see page 28)
  - Approve or reject the requirement version (see page 29).

Review the Prerequisites

Review the following prerequisites to help ensure that you can successfully create a requirement version.

- The requirement is created.
- RCM is enabled, if you want to follow the approval process.

Create an Approved Version of the Requirement

If RCM is not enabled, the requirement owner can create an approved version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click Details for the requirement you want to work with.
3. Click Create New Version.
4. Select the type of version to create:

   Minor

   Specifies that the updates are small changes, such as 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, or changing the scope of the requirement. The version changes by one full version number (1.0).

5. Click Create.

A new version of the requirement is created. 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 is specified by a minor or major version type.

Versions

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

Submit the Requirement for Approval Under Change Management

When RCM is enabled, the requirement owner must go through an approval process to create an approved version.

Follow these steps:

1. Click Requirements, and from Detailed Planning, click Requirements.
2. Click Details for the requirement you want to work with.
3. Review the draft, and when it is ready for approval, click Submit for Approval.

   The Submitting for Approval pop-up dialog opens.
4. Select one of the following Version Type options:

   Minor

   Specifies that the updates are small changes, such as 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, or changing the scope of the requirement. The version changes by one full version number (1.0).
5. Click Submit.

Scroll to the Approval History section. An entry is added for the approval request, showing that the draft has been submitted and the status is Pending.

The product owner receives an email notification about the request.

Approve or Reject the Requirement Version

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

   The Requirement Detail page appears.

   Note: You can also click the link in the email and open the Requirement Detail 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.

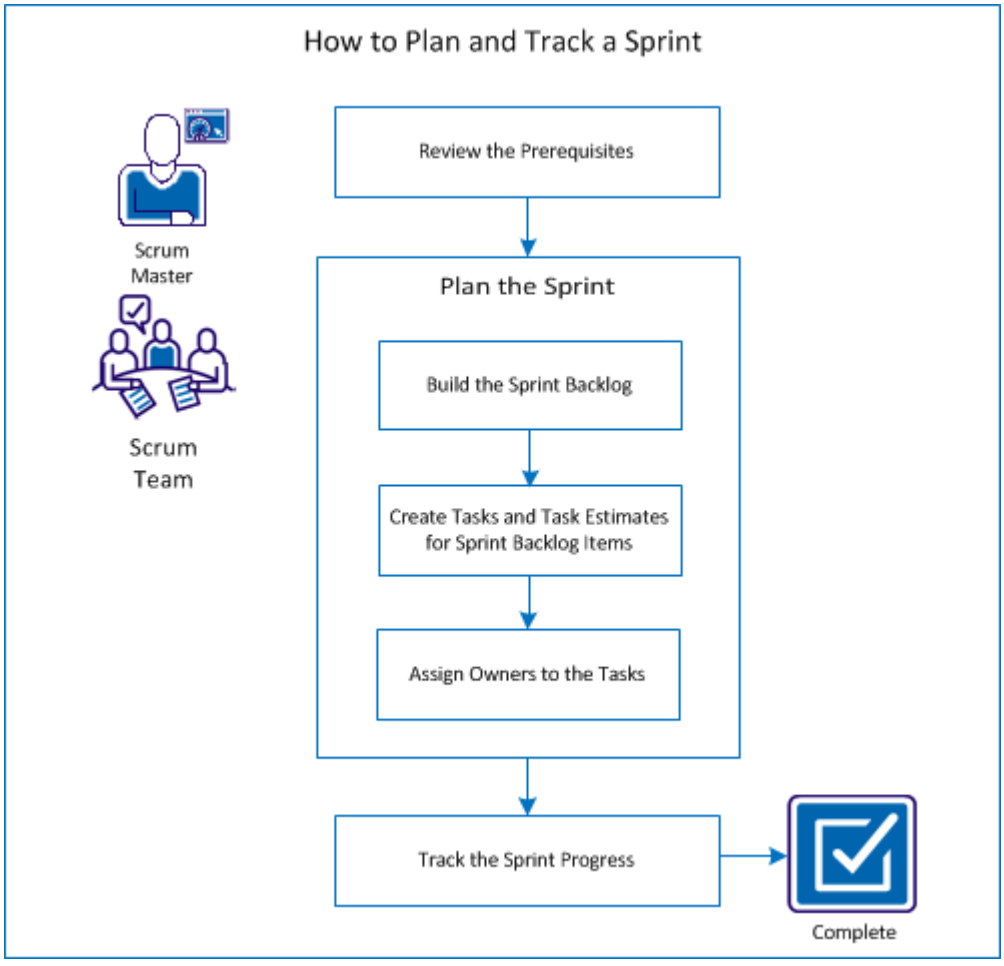
Chapter 4: Scrum Master, Team Member Scenarios

This section contains the following topics:

How to Plan and Track a Sprint

Sprints are a series of iterations in the product development lifecycle in which the items planned during release planning are delivered. Sprints are time bound iterations that are typically spread over two to four weeks. The scrum master collaborates with the scrum team to plan a sprint.

The following diagram describes how the scrum master and scrum team plan and track a sprint.



Perform these steps to plan and track a sprint:

1. Review the prerequisites (see page 33)
2. Plan the sprint (see page 33)
   - Build the sprint backlog (see page 34)
   - Create tasks and task estimates for sprint backlog items (see page 35)
   - Assign owners to the tasks (see page 35)
3. Track the sprint progress (see page 36)

Review the Prerequisites

Before you plan a sprint, verify that the following items are set up in the product.

- Release Backlog is populated with user stories and issues.
- Points are specified for the backlog items to calculate the sprint capacity.
- Sprint is added.
- Scrum Team is added.

Plan the Sprint

At the beginning of each sprint, the scrum master and the scrum team meet to determine the scope of the planned work for the sprint. During the meeting, you identify the user stories that can be covered in the sprint. For example, your team determines that they can complete 60 points in the sprint. Select the user stories and issues, which are based on priority and capacity points that the team can commit to completing.

Perform the following tasks during sprint planning:

- Build the sprint backlog (see page 34).
- Create tasks and task estimates for sprint backlog items (see page 35).
- Assign owners to the tasks (see page 35).

Build the Sprint Backlog

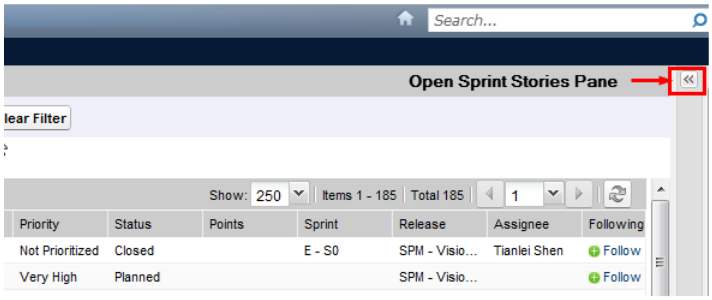
The sprint backlog includes the backlog items that the scrum team plan to work on during the sprint. During the sprint plans, you move the user stories and issues from the release backlog to the sprint backlog. For example, in the Parking Pass Management System product, the following user stories have been identified for the release:

- As a commuter, I want to purchase a parking pass online.
- As a commuter, I want to pay for a parking pass by credit card.
- As a commuter, I want to pay for a parking pass by PayPal™.

You can select the user stories that you want to complete in the current sprint, and move them to the sprint backlog.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Click Open Sprint Stories Pane to display the sprint stories backlog.



   The pane displays the backlog items for the current sprint.

4. (Optional) Use one of the following methods to filter the view by sprint:
   - Select an existing filter.
   - Create a filter.
5. Drag-and-drop a user story or issue from the release backlog onto the sprint backlog.
6. Repeat Step 5 to add additional user stories and issues to the sprint backlog.

Note: Filter the sprint backlog by team to display the velocity chart. The velocity chart shows the planned capacity against actual capacity. The chart helps the scrum team plan the number of user stories that they commit to during the sprint.

Create Tasks and Task Estimates for Sprint Backlog Items

Create tasks to break down the work for user stories and issues to which the scrum team commits. You can also enter the estimated hours that are required to complete the task. For example, for the user story "As a commuter, I want to pay for a parking pass by credit card", you can break down the work into two tasks:

- Create the interface.
- Test the interface

You estimate two hours to create the interface and one hour to test the interface.

The scrum team can also log the numbers of hours they worked for a user story at the task level.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the product name from the Product drop-down list.
3. Filter the view by sprint to display the sprint backlog for which you want to create tasks.

   Note: By default, the current sprint appears.
4. Click the user story or issue title link.

   The User Story or Issue Details page opens.
5. Scroll to the Task section and click New Task.
6. Complete the required fields. The following fields require explanation:

   Estimated Hours

   Approximate hours to complete the task.
7. Save your changes.

Assign Owners to the Tasks

Assign an owner to each task to identify who takes the responsibility for completing the effort. You can assign more than one owner to a task.

For example, you can assign two developers as owners for the task to create an interface for purchasing a parking pass online. While one developer writes the code for the feature, the other developer reviews the code.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the product name from the Product drop-down list.

3. Filter the view by sprint to display the user stories to which you want to assign owners.
4. Click Details next to the backlog item.
5. Select the owners by either typing the name in the Owners field, or by selecting a name from the pull-down list.
6. Save your changes.

Track the Sprint Progress

You can use the Sprint Backlog & Charts to track the progress of the sprint and identify any risk. The Sprint Backlog & Charts page displays hours burndown or points burndown to provide a comprehensive report.

Follow these steps:

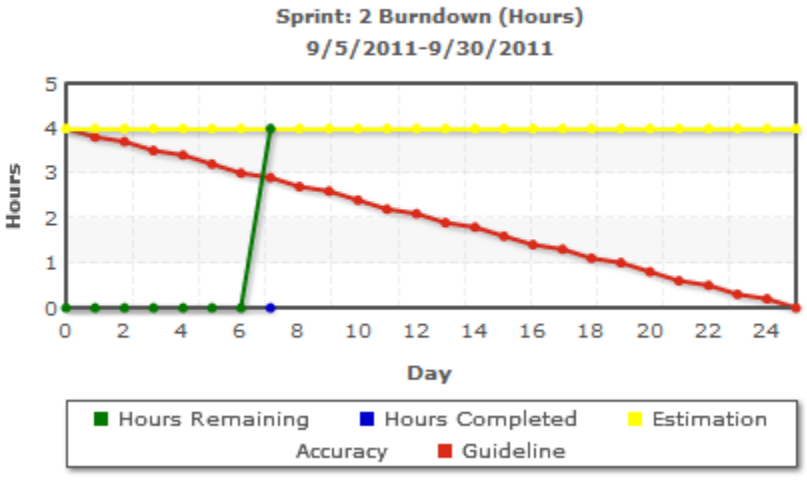
1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Select the Product, Release, and Sprint from the drop-down list.

   The Burndown and Allocation Chart appears for the selected sprint.

   Hours Burndown

   An hours burndown chart compares the actual hours that the team burned on user stories against the expected burndown for the sprint.

Burndown and Allocation Charts



Points Burndown

A points burndown chart compares the remaining story points that the team completed against the expected burndown.

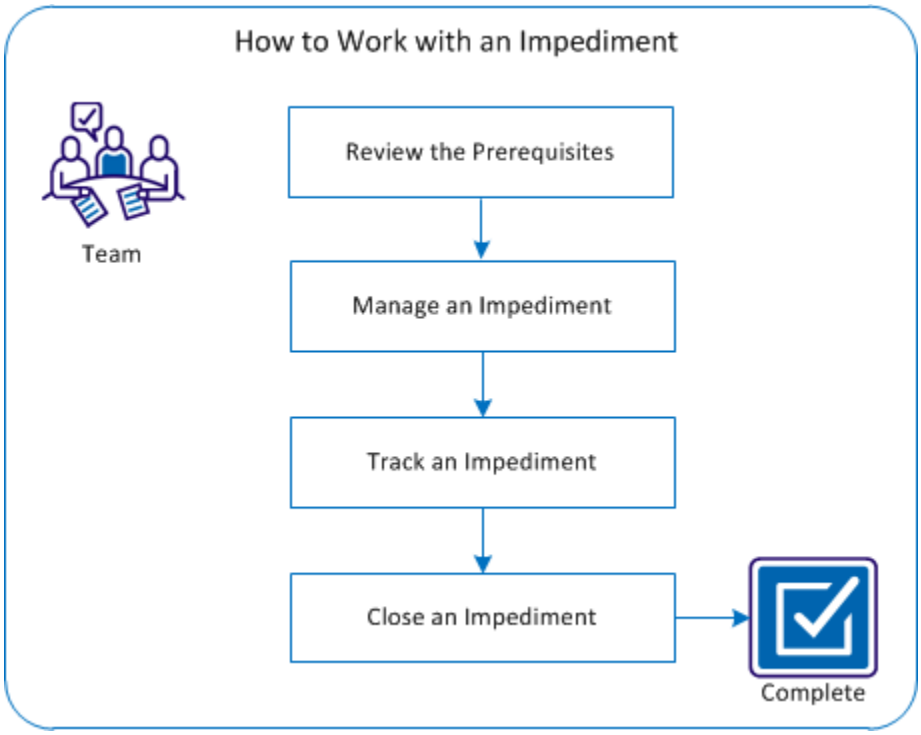
You have successfully planned and tracked a sprint.

At the end of a sprint, update the status of the backlog items to closed or move the incomplete items to the next sprint. The scrum master conducts a retrospective meeting with the team to discuss and identify the steps to improve the process.

How to Work with an Impediment

As a team member, you can create an impediment to specify how a problem is impacting the task, and how severe the impact is.

The following diagram describes how a team member works with an impediment.



To work with an impediment, perform these steps:

1. Review the prerequisites (see page 38).
2. Manage an impediment (see page 38).
3. Track an impediment (see page 39).
4. Close an impediment (see page 39).

Review the Prerequisites

Before you work with an impediment, verify that the following items are set up in the product:

- User stories and tasks are created.
- Team is assigned.

Manage an Impediment

You can add, modify, or delete an impediment to a task. Add an impediment to the task that you are working on and update the status when the problem is resolved.

For example, the QA Engineer to test a new feature is on leave, so testing cannot be done on schedule. This impediment could affect the project timelines unless a new resource is found to do the required testing. If a new resource is found, the status of the impediment is updated.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Click Details for the user story that has an impeded task.
3. Click the Details link for the task.
4. Scroll to the Impediment section, and click New Impediment.

   The New Impediment pop-up dialog opens.
5. Complete the required fields.
6. Save your changes.

   The message area at the top of the page displays a warning that the task is impeded.

Note: To edit or delete an impediment, open the Task Details page, select the impediment, and click Edit or Delete.

When you create an impediment, the following visual cues appear for the task:

- A message flag appears on the Task Details page.
- An icon appears in the task list on the User Story Details page.
- If you are using Sprint, an icon appears on the Virtual Wall task card, and in the task list on the Sprint Backlog & Charts.
- If you are using Kanban, an icon appears on the kanban board story card, and in the task list on the Kanban Backlog & Charts.

Track Impediment

You can track the status of an impediment from the Sprint Backlog & Charts page to understand the progress. For example, to test a new feature, a new resource is assigned in place of the QA Engineer who is unavailable. The information is updated for the impediment. The team members can track this information from the Sprint Backlog & Charts page.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Expand the user story that has an impeded task.
3. Click the Details link for the task.
4. Navigate to the Impediments section and check the status of the impediment.

Note: If you are using Kanban, click Agile, and from Kanban Tracking, click Kanban Backlog & Charts page to track the status.

You can also track the status of an impediment using the following features:

- Select Follow for the impediment, and use the Chatter Feed view to track the update.
- View the Impediments by Release report.
- View the status of impediment from the Task Details page.

Close an Impediment

You can close an impediment if the impeding issue is resolved and it is no longer a challenge to complete the task. For example, the team member can close the impediment, since a new resource is assigned to do the required testing.

Follow these steps:

1. Click Agile, and from Sprint Tracking, click Sprint Backlog & Charts.
2. Hover over the Impediment icon, and click the Task Details link from the tooltip.

   The Task Details page appears.
3. Navigate to the Impediments section, and select Closed in the Status field for the impediment.
4. Save your changes.

Note: If you are using Kanban, click Agile, and from Kanban Tracking, click Kanban Backlog & Charts page to close the impediment.

The following changes are visible for the task:

- The impediment is deleted and disappears from the Impediments list on the Task Details page.
- The message flag closes on the Task Details page.
- The icon disappears from the task list on the User Story Details page.
- The icon disappears from the Virtual Wall task card.
- The icon disappears from the task list on the Sprint Backlog & Charts page.
- The icon disappears from the kanban board story card.
- The icon disappears from the task list on the Kanban Backlog & Charts page.

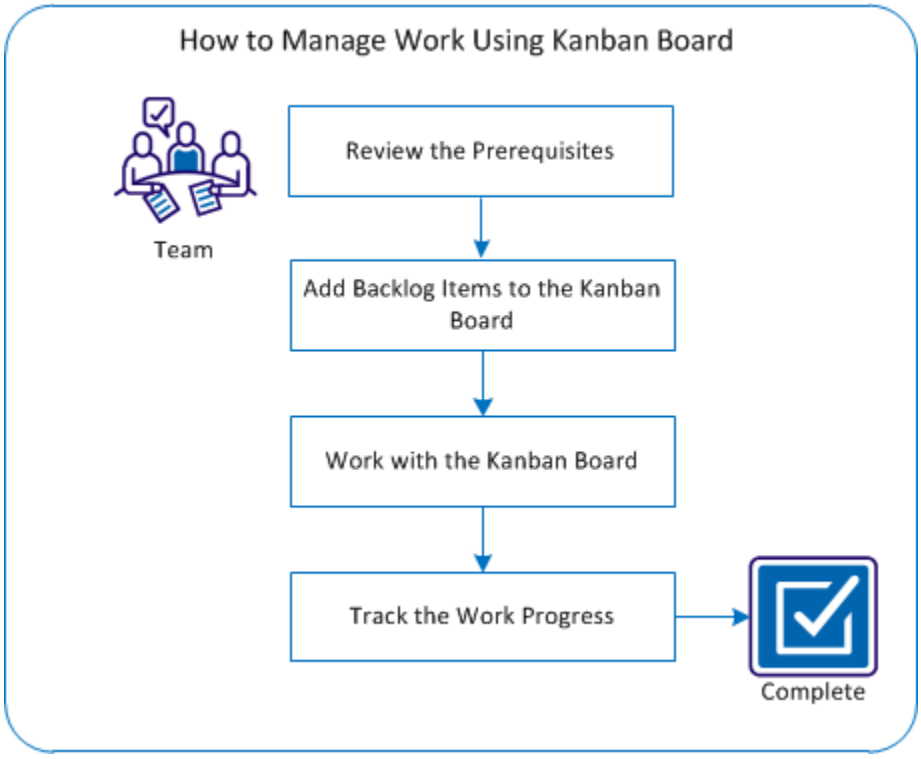
You have successfully used an impediment to communicate a problem impacting the completion of a task.

How to Manage Work Using Kanban Board

As a team member, you can manage and track the product backlog work using the Kanban Board. You can add user stories and issues to the product backlog using the Kanban Board and track its progress.

For example, the team at Forward, Inc. is planning for the next release of their online trading software. The product manager has identified the new features and enhancements for the upcoming release, and plans to implement Kanban to deliver the project.

The following diagram describes how the team members can manage and track the product backlog work using the Kanban Board.



To manage and track a release using Kanban Board, perform the following steps:

1. Review the prerequisites (see page 42).
2. Add backlog items to the Kanban Board (see page 43).
    a. Add backlog items from the product backlog list (see page 43).
    b. Add backlog items from the backlog queue on the Kanban Board (see page 44).
    c. Add backlog items directly to the Kanban Board (see page 45).
3. Work with the Kanban Board (see page 45).
    a. Manage user story and issue tasks (see page 46).
    b. Mark user story or issue as Ready to Pull (see page 47).
    c. Move Ready to Pull story cards (see page 48).
4. Track the work progress (see page 49).

Review the Prerequisites

Before you use the Kanban Board to manage the product backlog, verify that the following items are set up in CA Clarity Agile and CA Clarity Requirements.

- The product backlog is created.
- The release is created and release planning is done.
- The user stories and issues for the release are prioritized.
- The Kanban Board is created for the release.
- The Kanban Board is configured with the status lanes. The status lanes represent the stages in the project lifecycle.
- Each lane on Kanban Board is configured with the work in process (WIP) limit. The WIP limit is the maximum number of user stories that you can work on at any time.

For example, Michael creates a Kanban Board. He identifies the backlog of user stories for the release and prioritizes them in the order of business importance. The following status lanes and WIP limits is configured on the Kanban Board.

Status Lane	Description	WIP Limit
Planned	User stories ready for development.	5
Development	User stories under development.	3

Status Lane	Description	WIP Limit
Test	Developed user stories under testing.	2
Completed	User stories ready to close.	5

Add Backlog items to the Kanban Board

The product backlog contains user stories and issues. You can add the backlog items planned for the release to the Kanban Board. The linked backlog items appear on the Kanban Board as story cards. As the tasks associated with the backlog items complete, the story cards are moved from one status lane to other.

To add backlog items to the Kanban Board, follow one of these methods:

- Add backlog items from the product backlog list (see page 43).
- Add backlog items from the product backlog queue on the Kanban Board (see page 44).
- Add backlog items directly to the Kanban Board (see page 45).

Add Backlog Items from the Product Backlog List

Michael can select the backlog items prioritized for the release from the product backlog list and add them to the Kanban Board. The team can work on the backlog items added to the Kanban Board.

- As a General Manager, I want to see all activities on the quotes that are open for my product lines.
- As a manager, I want to see reports that indicate trade volumes.
- As a client, I want to be able to use the site for personal trades.

Follow these steps:

1. Click Agile, and from Planning, click Backlog.
2. Select the product name from the Product drop-down list.
3. Filter the backlog items for the release.
4. To add a backlog item to the Kanban Board, follow one of these steps:
    a. Select the user story or issue from the list and use inline editing to select the Kanban Board.
    b. Click Details for the user story or the issue, and update the Kanban Board name.
5. Save your changes.

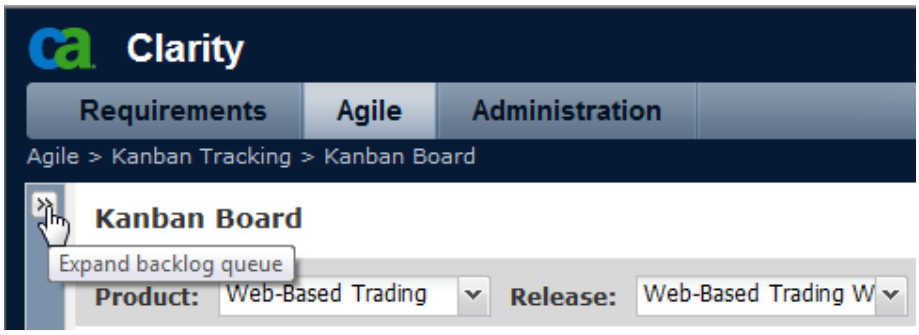
Add Backlog Items from the Product Backlog Queue on the Kanban Board

Michael can select the backlog items from the Product Backlog Queue and add them to the Kanban Board so that the team can work on them. He decides to add another two user stories to the Kanban Board:

- As an executive, I need consistent reporting across the system.
- As a director, I need an org chart that is updated quarterly.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click Expand backlog queue.



User stories identified for the release, but not assigned to any sprint or Kanban Board appears as story cards.

4. Drag the story cards to the Kanban Board so that the team can start working on them.

   Note: If the number of user stories in the lane exceeds the WIP limit, the header of the lane is highlighted.

Add Backlog Items Directly to the Kanban Board

When you add a backlog item directly to the Kanban Board, it is associated, by default, with the first kanban lane on the board. You can change the default values, and you can attach the backlog item to another Kanban Board or kanban lane. If the number of story cards in the lane exceeds the WIP limit, the lane header is highlighted and you can drag it to the backlog queue.

For example, Michael discussed with the customers the enhancements and new features that are planned for the new release. One of the customers suggested a feature, which Michael feels would be a significant value-add to the product. Michael decides to add the feature in the current release and adds the following user story to the Kanban Board.

- As a Client, I need online library integration.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.

   The Kanban Board displays the story cards.
3. Click New User Story or New Issue.
4. Complete the required fields.
5. Save your changes.

   Note: To edit or delete a user story or issue from the Kanban Board, click the title or the arrow in the story card.

Work with the Kanban Board

The backlog items are represented with story cards. The team members pull the story cards with higher priority from the backlog to the Kanban Board. When the tasks assigned to the backlog item are completed, the story card is marked as Ready to Pull. The story cards are then pulled to the next lane by the team members.

For example, Michael moves five user stories with the highest priority to the Planned lane. The project goes through the following phases on the Kanban Board:

- The developers pull three story cards in the prioritized order from the Planned lane to the Development lane.
- As the Planned lane now has only two story cards, Robert moves three more story cards from the backlog to the Planned lane. The number of story cards in the lane is maintained at the WIP limit.
- Once the developers have completed their tasks, they mark the story cards as Ready to Pull.
- The QA engineers pull these story cards to the Test lane and start working on them.
- Once the testing is completed, they mark it as Ready to Pull.
- The project manager can move the Ready to Pull story cards from the Test lane to the Completed lane.

Every time developers or QA engineers needs user stories to work on, they move Ready to Pull story cards from the previous lane. The cycle continues until you complete all the user stories in the backlog.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Complete any of the following tasks:
    a. Pull a backlog item from the Backlog Queue to the Kanban Board.
    b. If you have completed the tasks on the backlog item, mark it as Ready to Pull.
    c. If you are waiting for a backlog item to work on, move a user story or issue marked Ready to Pull from the previous lane.

Manage User Story and Issue Tasks

You can add and update the tasks associated with the user stories and issues planned for the release. As you update the tasks with the daily work logs, the indicator on the story card displays the following information:

- The percentage of work completed.
- Number of hours of work done on the user story.
- The remaining hours planned for the work.

If there are any impediments to the tasks that you are working on, the story cards display an icon.

For example, for the user story “As a General Manager, I want to see all activities on the quotes that are open for my product lines”, the team members adds the following tasks:

- Test positive and negative condition combinations.
- General Manager can see and select from only those product lines they are assigned to.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click the title on the story card.

   The details page appears.
4. Click New Task in the Tasks section.
5. Complete the required information.
6. Save your changes.

Note: To update the tasks, click the arrow on the story card and click Edit Task. You can also update the task work logs with the number of hours worked.

Mark User Story or Issue as Ready to Pull

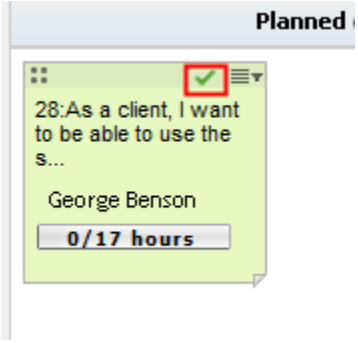
You can mark the story card as Ready to Pull when the tasks associated with its user story or issue are completed. The story cards which are Ready to Pull are indicated with a checkmark on the story card.

For example, the team members complete the tasks associated with the user story “As a General Manager, I want to see all activities on the quotes that are open for my product lines”. The story card for the user story is marked as Ready to Pull.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Click the arrow on the story card, and click Mark as Ready to Pull.

   The story card is marked with a checkmark indicating you can pull the card to the next lane.



Move Ready to Pull Story Cards

Team members can move story cards marked as Ready to Pull to the next lane to continue with the project.

For example, the QA engineers pull the user stories to the Test lane and start working on them. Once the testing is completed, they mark it as Ready to Pull so that it can be pulled to the next lane.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Board.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Drag-and-drop the Ready to Pull story cards to the next lane.

Note: The Ready to Pull checkmark disappears when you move the story card to the next lane.

Track the Work Progress

You can track the progress of the project and can identify roadblocks through the Kanban Board and Kanban Backlog & Charts. The Kanban Backlog & Charts page provides the following information:

- List of backlog items and related tasks for the release. You can use inline editing and modify the details.
- Hours worked on each task.
- Average cycle time to complete a backlog item. Average cycle time is the time taken to close a user story or issue since the team started working on it.
- Number of days each backlog item has spent in the lane, which helps identify any blockers.
- Backlolg items which are ready to be pulled to next lane.

Note: You can click Configure and select the columns to appear on the page.

You can also track and forecast the project using the following charts:

- Cycle Time chart (see page 49)
- Cumulative Flow chart (see page 50)

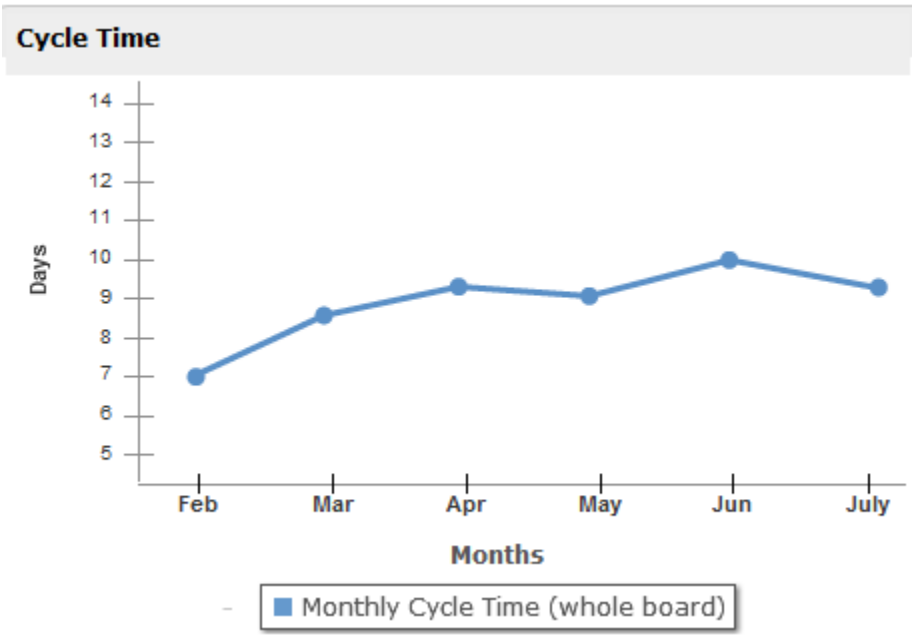
For example, Michael can analyze the Cycle Time and Cumulative Flow chart to understand the average time it takes to complete a user story, the remaining work, and forecast when all of the user stories will be completed.

Cycle Time Chart

Cycle Time starts when the actual work begins and it ends when the task is finished. Cycle Time is a key metric that helps to make realistic commitments, and provides insight into whether improvements are yielding expected results.

Every time cards are pulled off the board, Cycle Times for each task is measured and chart is generated. Cycle Time chart presents the average time it takes for a task to process between the specified start and end lanes. You can define the time period for which the tasks are included in the chart. The chart is used to analyze the time required to traverse work items and make improvements in the project performance.

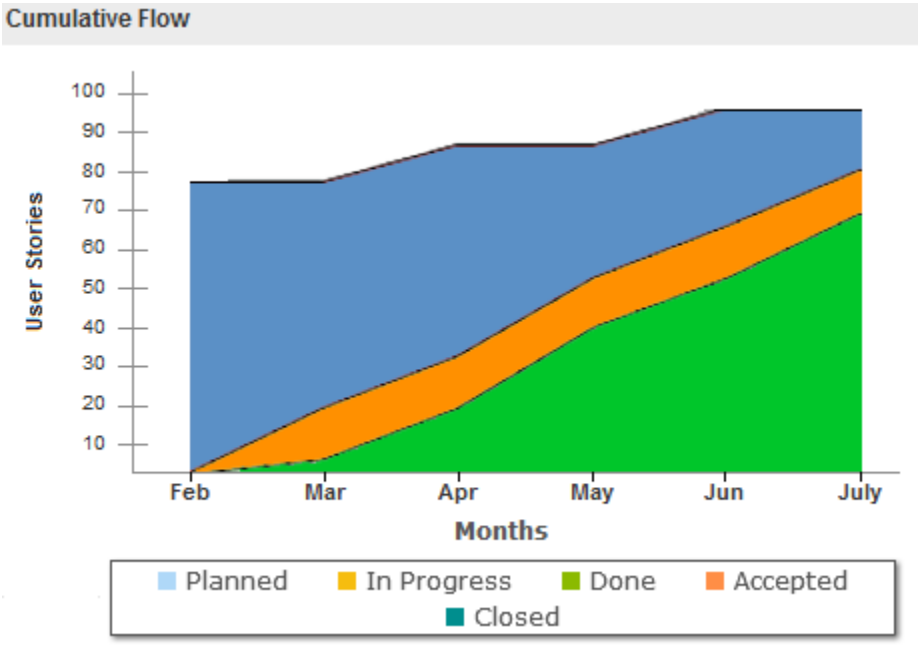
The following figure displays the Cycle Time generated for the period between February and July.



Cumulative Flow Chart

Cumulative Flow chart presents the relative amount of work for each stage of project over time. Colored areas on the diagram represent work in progress for each stage of a process.

The following figure displays the Cumulative Flow chart generated for the period between February and July.



The vertical axis of the chart displays how many items are currently in progress. The horizontal axis displays the duration it takes for a task to complete. Measuring the horizontal axis on a Cumulative Flow chart allows you to monitor the Cycle Time and forecast when all the work in progress will complete. Vertical axis helps you to set the right WIP limits.

Follow these steps:

1. Click Agile, and from Kanban Tracking, click Kanban Backlog & Charts.
2. Select the product, release, and the Kanban Board name from the drop-down lists.
3. Select the Start date, End date, Time Scale, Start Lane, and End Lane.
4. View the Cycle Time and the Cumulative Flow charts.

You have successfully used Kanban Board to manage and track the product backlog work.

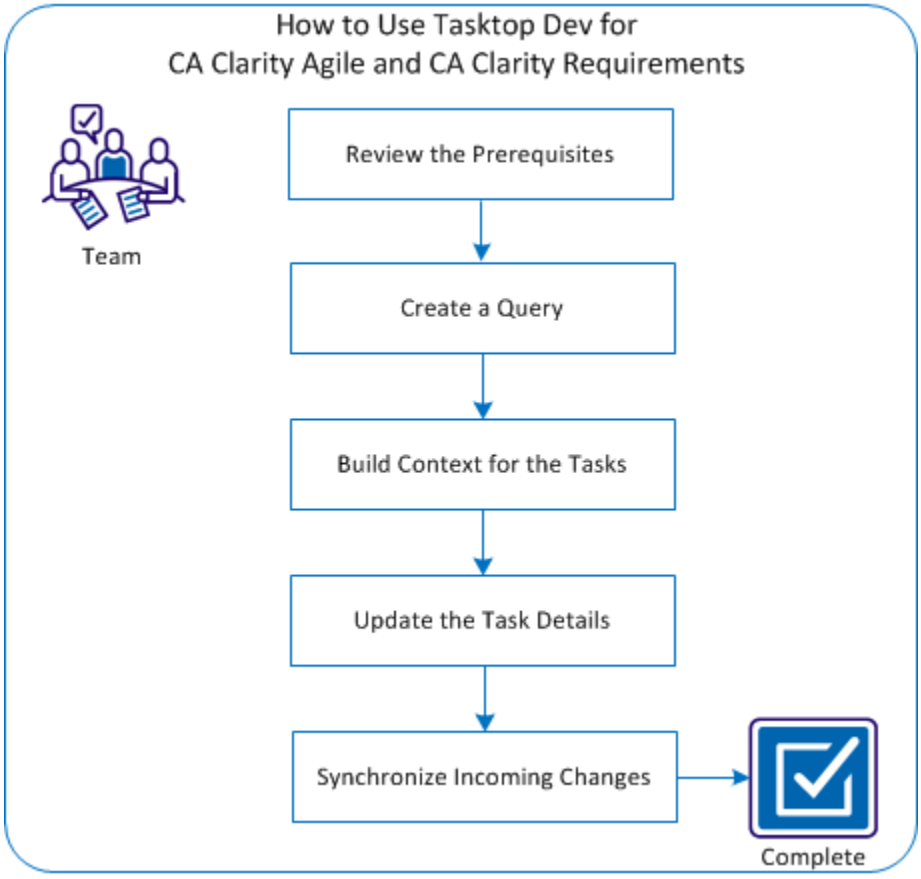
How to Use Tasktop Dev for CA Clarity Agile and CA Clarity Requirements

The integration of Tasktop Dev for CA Clarity Agile and CA Clarity Requirements with the Eclipse IDE makes it easy for development teams to stay informed of changing project priorities. The integrated environment provides visibility into development progress from within CA Clarity Agile and CA Clarity Requirements.

As a team member, you can use the Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE to update and view the project details, and continue with your software development tasks.

For example, Alice, who is the software developer working on the Parking Pass Management System, uses the Eclipse IDE to write software code. She can use the Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE to update the project progress as she works on the user stories.

The following diagram describes how the team can use Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE.



To use Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE, perform these steps:

1. Review the Prerequisites (see page 53).
2. Create a query (see page 53).
3. Build context for the tasks (see page 54).
4. Update the task details (see page 55).
5. Synchronize incoming changes (see page 55).

Review the Prerequisites

Before you start using the Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE, verify that the following items are set up:

- The Tasktop Dev for CA Clarity Agile and CA Clarity Requirements connector is installed. For more information about the installation, see the instructions on the Tasktop website.
- The Task Repository is created.

Create a Query

As a team member, you can create a query in the integrated environment to see the list of user stories, issues, and requirements from CA Clarity Agile and CA Clarity Requirements.

For example, Alice creates a query to get all of the user stories of Parking Pass Management System for which she is the owner.

Follow these steps:

1. Open Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE.
2. Click File, and from New, click Other.

   Select a wizard dialog appears.
3. Select Query from the list of wizards, and click Next.
4. Select your project repository, and click Next.
5. Select a query type and click Next.
6. If you are creating a query using form, provide the query details, and click Finish.

   The Task List window shows your query results.

Note: If the Task List is not available, open it from Window, Show View, and click Task List.

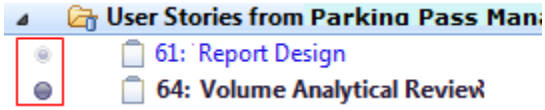
Build Context for the Tasks

A context provides an easy access to the relevant code for the task you are working on. When you search for the relevant code for the user story that you want to work on, the Package Explorer section displays the location of the code. This is called building context for the task. Each context is associated with a user story or requirement in the task list. The contexts make it easier to navigate to the identified code.

For example, Alice is working on the user story “I want to pay for parking pass by credit card”. She searches for the relevant code in the IDE. The Package Explorer displays the context to the selected code. Every time Alice returns to the IDE to work, she does not have to search for the code again. She can select the context to start working.

Follow these steps:

1. Open Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE.
2. Select a user story, issue, or requirement from the task list.
3. Activate the task by clicking the circle icon in the left column of the task list.



4. Search for the relevant code.

The Package Explorer builds the context.

Update the Task Details

You can update the user story, issue, or requirements for the project from the integrated environment. The changes are reflected on the CA Clarity Agile and CA Clarity Requirements.

For example, Alice has spent 8 hours working on the user story “I want to pay for parking pass by credit card”. She wants to update the work log for the user story. Alice locates the user story and updates the information through the IDE. The submitted information gets updated on the CA Clarity Agile project details.

Follow these steps:

1. Open Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE.
2. Select a user story, issue, or requirement from the task list.
3. Double-click the task you want to update.

   The design form for the task is displayed in the workspace.
4. Update the information and click Submit.

   The CA Clarity Agile server is updated with the information.

Synchronize Incoming Changes

Tasktop Dev allows two-way synchronization. The changes in the task details displayed on integrated environment immediately appear on CA Clarity Agile and CA Clarity Requirements. If the information on CA Clarity Agile and CA Clarity Requirements is modified, you can manually synchronize to display the updated information on the integrated environment.

For example, the product owner used CA Clarity Agile to update some information on the user story “I want to pay for parking pass by credit card”. Alice can synchronize her integrated environment to see the update.

You can synchronize the incoming changes by one of the following ways:

- Click the Synchronize Incoming Changes icon on the workspace to synchronize the selected task.
- Click the Synchronize Changed icon on the Task List to synchronize the complete task list.

You have successfully used the Tasktop Dev for CA Clarity Agile and CA Clarity Requirements integrated Eclipse IDE to update the project details as you continue with the software development tasks.

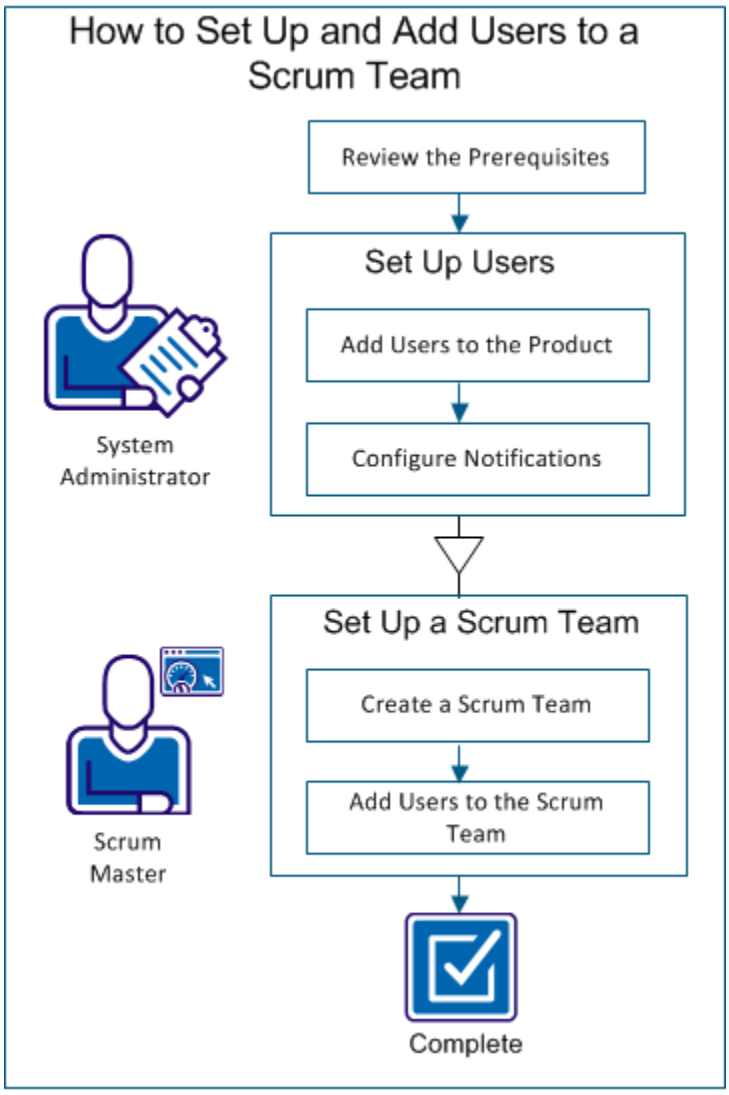
Chapter 5: System Administrator Scenarios

This section contains the following topics:

How to Set Up and Add Users to a Scrum Team

The system administrator can set up users in CA Clarity Agile and CA Clarity Requirements so they are eligible to participate in the product development tasks. The scrum master can then add the users to the scrum team. The users can then add user stories and tasks to the product.

The following diagram describes how a system administrator sets up users, and a scrum master adds the users to the scrum team.



Perform these steps to set up users in the product and add the users to the scrum team:

1. Review the prerequisites (see page 59).
2. Set up users.
   a. Add users to the product (see page 59).
   b. Configure notifications (see page 60).
3. Set up a scrum team.
   a. Create a scrum team (see page 60).
   b. Add users to the scrum team (see page 61).

Review the Prerequisites

Before you add users to the product, verify that they are added in Salesforce.com as one of the following profiles:

- CA Clarity Agile user.
- CA Clarity Requirements user.
- CA Clarity Agile and CA Clarity Requirements user.

Note: The options to add a CA Clarity Agile user and CA Clarity Requirements user are available only if the user has licenses for both.

Add Users to the Product

The system administrator can add users to CA Clarity Agile so that they are available to participate in the product. The scrum master can add the available users to different teams, and associate to user stories and tasks.

For example, Tom is a Salesforce user, but is not added as a CA Clarity Agile user. So, Tom cannot participate in any user stories in the product.

Follow these steps:

1. Click Administration, and from Organization, click Users.
2. Click New User.
3. Complete the following fields:

   Salesforce User

   Defines the name of the user you want to add.

   CA Clarity Agile

   Select if the user is a CA Clarity Agile user.

CA Clarity Requirements

Select if the user is a CA Clarity Requirements user.

4. Save your changes.

Configure Notifications

The system administrator can configure notifications so that the users are notified about any changes to the products they participate in. For example, you can configure notifications for Tom so that he receives an email when new tasks are added to the user story Tom created.

Team members can edit their own details and settings for each product in which they participate. The system administrator can edit the settings for any user.

Follow these steps:

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

Create a Scrum Team

The scrum master can create a scrum team and associate it with the product on which they work. You can assign multiple scrum teams to one product or sprint, and multiple sprints to one scrum team.

For example, the scrum teams Avengers and Jaguars can participate in the development of a product Parking Pass Management System. Avengers are assigned to work on user interface development user stories and Jaguars are assigned to work on user stories that are related to the database. Both the teams are assigned to the same sprint.

Follow these steps:

1. Click Agile, and from Resources, click Teams.
2. Click New Team.

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

   Active

   Specifies whether the team is active. Inactive teams are not available through CA Clarity Agile.

   Expected Velocity

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

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

   Story Point Scale

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

   Default: Fibonacci sequence (1,2,3,5,8,13,21)

   Scrum Team Domain

   Specifies the domain name or URL for the team.

4. Save your changes.

After you create a scrum team, it is automatically added to any new sprints created for the product to which the team is assigned. You can remove the scrum team from the default team assignments.

Add Users to the Scrum Team

The scrum master can add users to a scrum team, so that the users are available to participate on a product. A user must be an active CA Clarity Agile user to participate as a team member.

Important! To participate on a product, a user must be a member of at least one scrum team that is assigned to the product.

For example, add Tom to the Avengers team so that he can participate in the user interface related work of Parking Pass Management System.

Follow these steps:

1. Click Agile, and from Resources, click Teams.
2. Click Details for the team to which you want to add a member.

   The Team Details page opens.

3. Scroll to the Team Members section, and click New Team Member.

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

   Allocation (%)

   Specifies the percentage of time the member is allocated to this team or product. Specify a value so that the team member is considered in the team allocation charts.

   Default: 100 percent

5. Repeat steps 3 and 4 to add more users to the team.
6. Save your changes.

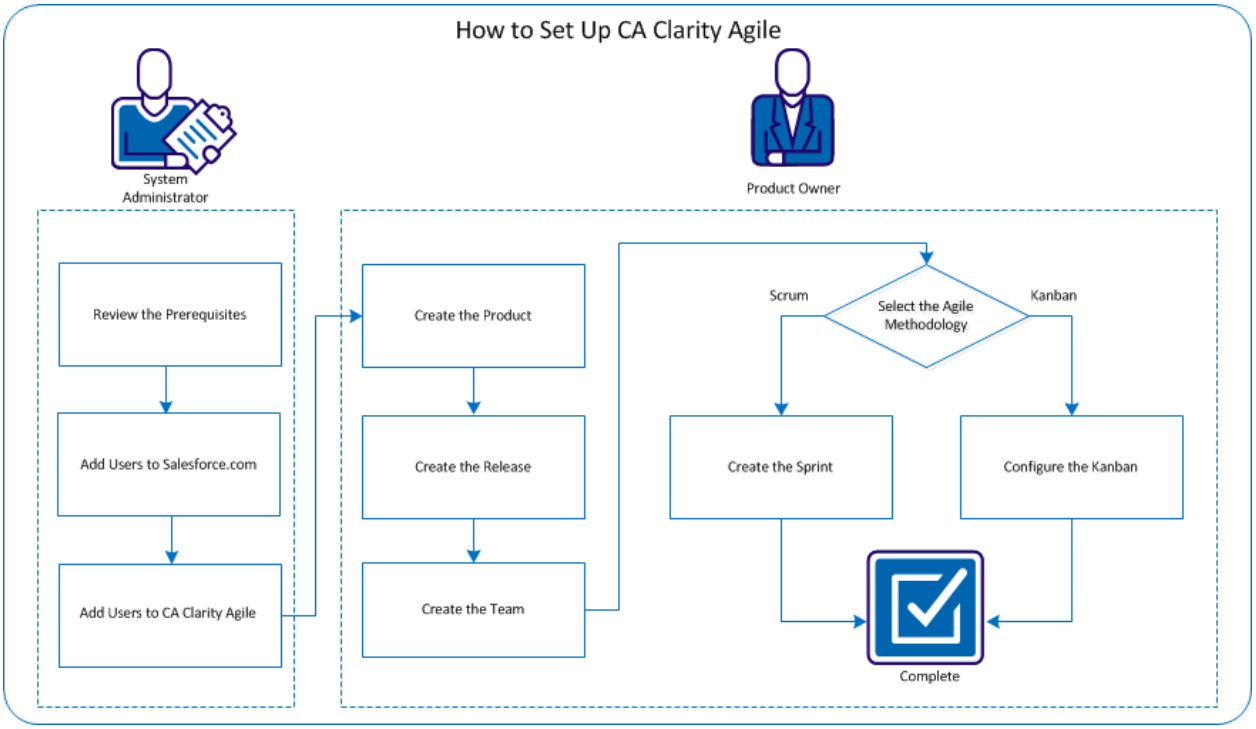
You have successfully set up users in the product and added them to a team. These users can now participate in sprints, and add user stories or tasks.

How to Set Up CA Clarity Agile

The system administrator and the product owner can set up CA Clarity Agile to manage projects, and allow team members to participate in the projects.

For example, Dave, the system administrator, is assigned the task of setting up CA Clarity Agile so that Alice, Carlos, and Dylan can participate in the projects. Dave contacts Michael, the product owner, to help him with the task.

The following diagram describes how the system administrator and the product manager can set up the CA Clarity Agile to manage a project.



To set up CA Clarity Agile, perform the following tasks:

1. Add users to Salesforce.com (see page 64).
2. Add users to CA Clarity Agile (see page 65).
3. Create the product (see page 66).
4. Create the release (see page 66).
5. Create the team (see page 67).
6. Select the Agile Methodology (see page 68).
    a. Create the Sprint (see page 68).
    b. Configure the Kanban Board (see page 69).

Review the Prerequisites

Before you set up CA Clarity Agile, verify that the required user profiles are available in Salesforce.com.

Add Users to Salesforce.com

As the system administrator, you can add users in Salesforce.com and can assign user profiles to each user to define the access rights. You can assign one of the following profiles to the user:

- Agile user
- Requirements user
- Agile and Requirements user

These user profiles are part of the Salesforce license.

Follow these steps:

1. Log in to Salesforce.com as the System Administrator.
2. Click Setup.
3. From the Administration Setup, click Manage Users.
4. Click Add or edit users, and set user quotas.

   The user list page appears.
5. Click New.
6. Complete the required fields.
7. Save your changes.

Add Users to CA Clarity Agile

The system administrator can add the Salesforce.com users as CA Clarity Agile users, CA Clarity Requirements users, or both, and can assign the users to teams to participate in projects.

Note: The options to add users as a CA Clarity Agile or CA Clarity Requirements user are available only if you have licenses for both the products.

For example, Dave adds Alice, Carlos, and Dylan as CA Clarity Agile users so that they can participate in the projects.

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.

   CA Clarity Agile

   Select if the user is a CA Clarity Agile user.

   CA Clarity Requirements

   Select if the user is a CA Clarity Requirements user.

4. Save your changes.

You can assign the users to teams to participate in projects.

Create the Product

A product represents the result or solution to a requirement. A product is an umbrella under which all the features are grouped. As a product manager, you can create a product in CA Clarity Agile and add user stories to the product. For example, Michael creates a product called Parking Pass Management System.

Note: When you create a product in CA Clarity Agile, a unique ID is generated that you can link to a CA Clarity PPM project.

Follow these steps:

1. Click Administration, from Application, click Products.
2. Click New Product.
3. Complete the required fields.
4. Save your changes.

Create the Release

As a product owner, you can create a product release in CA Clarity Agile, which consists of user stories that are specific to the product. The team members can work on the user stories associated to the release.

For example, Michael creates Release 1.0 for the product Parking Pass Management System. He can later prioritize the user stories for the product and associate them to the release. The team members can work on the user stories associated to Release 1.0.

Note: 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.

   Release Date

   Specifies the 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 the end date of the last sprint in the release. If the team does not know the release date at the start of a release, they can update the release date as new sprints are added.

   Format: mm/dd/yy

4. Save your changes.

Create the Team

The product owner can create teams to work on different projects. One or more teams can be assigned to one product. For example, Michael creates a team called Galaxy, and adds Alice, Carlos, and Dylan as the team members. The Galaxy team works on Parking Pass Management System.

Follow these steps:

1. Click Agile, and from Resources, click Teams.
2. Click New Team.

   The New Team page appears.

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

   Active

   Specifies whether the team is active. You cannot filter based on inactive teams.

   Expected Velocity

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

   This value becomes the default velocity for the team for each new sprint that they are assigned to.

   Story Point Scale

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

   Default: Fibonacci sequence 1 through 21 (1,2,3,5,8,13,21).

   Team Domain

   Specifies the Domain name or URL for the team.

4. Save your changes.

Select the Agile Methodology

The product owners can follow either the Scrum or Kanban to deliver the projects. Create sprints for scrum, or kanban board for kanban projects.

Create the Sprint

The product owner can add sprints to deliver the project using the Scrum methodology. Sprints are a series of iterations in the product development lifecycle in which the items planned during the release planning are delivered. Sprints are time bound iterations that are typically spread over two to four weeks. The scrum master collaborates with the scrum team to plan a sprint.

For example, Michael plans to use the Scrum to work on the Parking Pass Management System. He divides the project time into series of iterations called sprints. He can later plan with the team to add the items to work on during each sprint.

Follow these steps:

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

   The Sprints page appears.

2. Click New Sprint.

   The Sprint Details page appears.

3. Complete the required 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.

When you add a team for a product, it is automatically associated to any sprint created for the product. You can remove the team from the default team assignments.

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 CA Clarity Agile.

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::

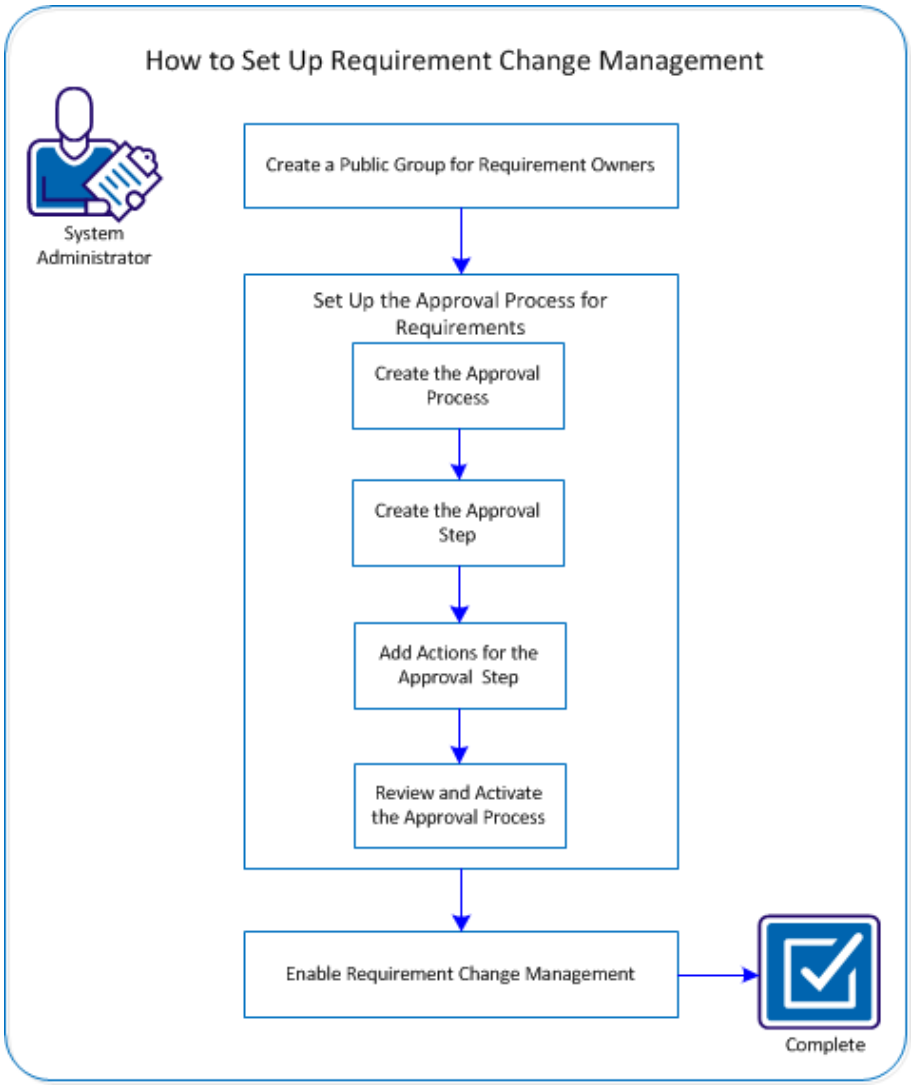
1. Click Administration, and from Application, click Releases.
2. Select the product name from the Product drop-down list.
3. Click Details for the release for which you want to create a Kanban Board.
4. Scroll down to the Kanban Boards sections, and click New Kanban Board.
5. Complete the required information.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

You have successfully set up the CA Clarity Agile to manage projects.

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 72).
2. Set up the approval process for requirements (see page 73).
3. Enable Requirement Change Management (see page 77).

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 Requirements 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.

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 73).
2. Create the Approval Step (see page 75).
3. Add Actions for the Approval Step (see page 76).
4. Review and Activate the Approval Process (see page 77).

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.

How to Configure Custom Attributes and Custom Values

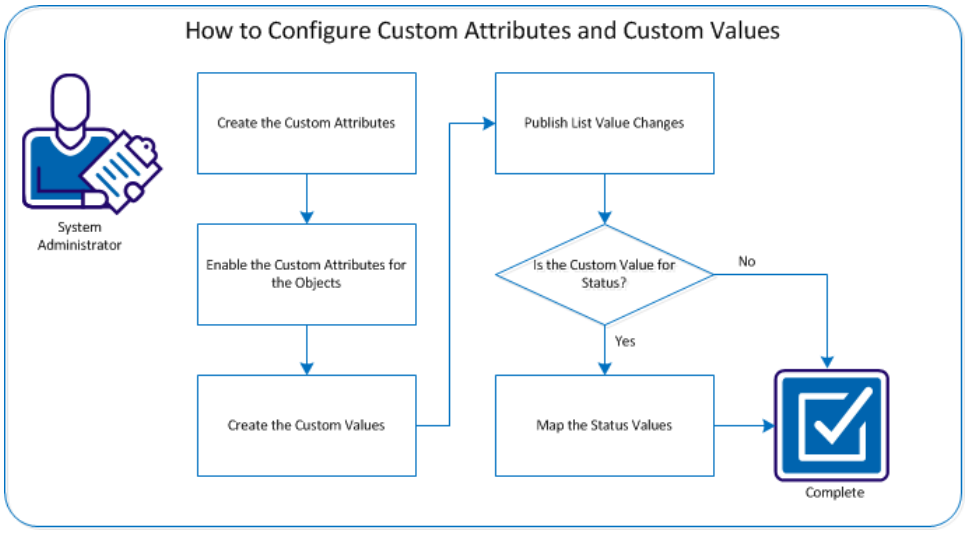
As a system administrator, you can configure custom attributes for CA Clarity Agile objects to provide more object details. The custom attribute you configure is available to all the products by default. You can also create new custom values for object fields at the application level. These custom values then show up on appropriate pages as values you can select from the drop-down lists.

You can create a maximum of 25 custom attributes for an object in a 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

For example, the team at First, Inc. wants to display the user story status to indicate the project progress. Dave, the system administrator, can add status field to the user story object and customize the lookup values. The team can use the status values to show their project status.

The following diagram describes how the system administrator can configure the custom attributes and customize the values in CA Clarity Agile and CA Clarity Requirements.



To configure custom attributes, perform these steps:

1. Create the custom attributes (see page 79).
2. Enable the custom attributes for the objects (see page 80).
3. Create the Custom Values (see page 80).
4. Publish List View Changes (see page 81).
5. Is the custom attribute for status value?
   - Map the status value (see page 81).

Create the Custom Attributes

You can create a custom attribute for an object and associate it with a product. For example, Dave creates a custom attribute named Status for the User Story object. The team can use the status of the user story to indicate their project progress.

Follow these steps:

1. Log in to Salesforce.com as the System Administrator.
2. Click Setup.
3. Expand Create from the App Setup, and click Objects.
4. Click the object name for which you want to customize the attributes.
5. Scroll to the Custom Fields & Relationships section and customize the fields as desired.
6. Save your changes.

Enable the Custom Attributes for the Objects

After a custom attribute is created, enable the attribute for a product to make it available for the objects. When you enable a custom attribute for a product, it is no longer available to other products.

For example, Dave enables the attribute Status for the User Story object for the product Parking Pass Management System.

Follow these steps:

1. Click Administration, and from Configuration, click Custom Attributes.
2. Select the product and the object for which you want to enable custom attributes.
3. Click Enable Attribute.
4. Select a field name.
5. Save your changes.

   The field appears in the field labels list.

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

Create the Custom Values

After the custom attributes are created, you can add values to it. You can customize the following fields in CA Clarity Requirements and CA Clarity Agile:

CA Clarity Requirements fields:

- Category
- Requirement State
- Product State

CA Clarity Agile fields:

- 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.

For example, Dave creates the custom values Planned, In Progress, Done, and Closed for the status field of the User Story object.

Follow these steps:

1. Log in to Salesforce.com as the System Administrator.
2. Click Setup.
3. Expand Create from the App Setup, and click Objects.
4. Click the object name for which you want to customize the values.
5. Scroll to the Custom Fields & Relationships section and click the field label.
6. Scroll to the Picklist Values section and customize the values as desired.

Publish List View Changes

You can publish the changes so that the new values are available for all the users in your organization to see. These changes can include modified object or attribute labels, picklist labels, and translations; or deleted custom attributes.

For example, Dave publishes the new attribute and its values, so that changes are visible and available on the pages for the users to use.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. Click Administration, and from Configuration, click List Views Publishing.
3. Click Publish.

Map the Status Value

If you create a custom attribute for the Status value of the user story or requirement objects, map the values as Open or Closed state. Specifying whether the state is open or closed ensures the accuracy of the burndown and velocity charts.

For example, Dave maps the custom values to the following values:

Status Value	Mapped Value
Planned	Open
In Progress	Open
Done	Closed
Closed	Closed

Follow these steps:

1. Click Administration, and from Configuration, click Status Mapping.
2. Click the Mapped Value field for the Status Value that you are mapping, and select Open or Closed from the pull-down list.
3. Save your changes.

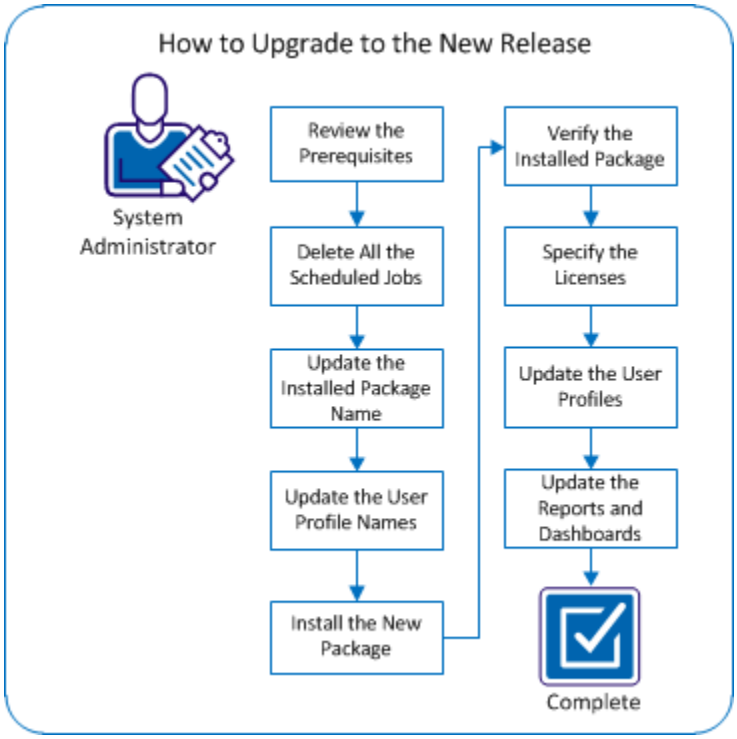
Note: Click Recalculate Chart to refresh the sprint information, and repopulate the burndown and velocity charts for the user stories and issues in the current sprint.

You have successfully configured custom attributes and custom values, which the users can use to provide details for the objects.

How to Upgrade to the New Release

The system administrator can upgrade CA Clarity Agile or CA Clarity Requirements to the new release so that users can benefit from the new and enhanced features. Winter 2013 is the latest release of CA Clarity Agile and CA Clarity Requirements. The upgrade includes installing and deploying the package, and configuring user profiles.

The following diagram describes how the system administrator upgrades CA Clarity Agile or CA Clarity Requirements to the new release.



Perform these steps to upgrade to the new release:

1. Review the prerequisites (see page 83).
2. Delete all scheduled jobs (see page 83).
3. Update the installed package name (see page 84).
4. Update the user profile names (see page 84).
5. Install the new package (see page 85).
6. Verify the installed package (see page 87).
7. Specify the licenses (see page 87).
8. Update the user profiles (see page 88).
9. Update the reports and dashboards (see page 89).

Review the Prerequisites

Review the following prerequisites to help ensure that you can successfully upgrade to the new release.

- Upgrade in sequential order, without skipping releases. For example, if you currently have Spring 2012 installed, upgrade to Summer 2012 before upgrading to Winter 2013.
- You have the product licenses for CA Clarity Agile, or CA Clarity Requirements, or both.

Delete All Scheduled Jobs in Salesforce

Before you upgrade to the new release, delete all scheduled jobs in Salesforce. Deleting scheduled jobs helps ensure that you successfully upgrade the product.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. Click the Setup link.

   The Personal Setup page appears.

3. In the Administration Setup section, expand Monitoring, Scheduled Jobs.
4. Delete the following jobs if they exist:
   - Chart data point generation for User Story Completion Status
   - Daily chart data point generation for Release
   - Daily chart data point generation for Requirement
   - Daily chart data point generation for Sprint
   - Daily update External Id for all objects
   - Requirements trend calculation
5. Return to the Personal Setup page.

   You are prepared to install the new package.

Update the Installed Package Name

Before upgrading modify the package name to match the new package name.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. Click Setup from the CA Clarity Agile or CA Clarity Requirements home page.

   The Personal Setup page opens in Salesforce.com.
3. Click Create from App Setup, and click Apps.
4. Click Edit for installed package CA Technologies - Clarity, and change the following:

   App Label

   CA Clarity
5. Save your changes.

Update the User Profile Names

The profile names in the new package are different from the existing ones. Update the existing user profiles names to new names.

The following table shows the new profile names.

Existing Profile Name	New Profile Name
Agile Vision Super-User	Agile Super-User
Agile Vision User	Agile User

Existing Profile Name	New Profile Name
Product Vision Super-User	Requirements Super-User
Product Vision User	Requirements User
Vision Super-User	Agile/Requirements Super-User
Vision User	Agile/Requirements User

Follow these steps:

1. Log in as an administrator at the following URL:
   `https://cavision.cloudforce.com`
2. Click Setup.
3. Click and expand Manage Users from Administration Setup, and click Profiles.
4. Click Edit next to each of the following profiles and update the names as mentioned in the preceding table:
   - Agile Vision Super-User
   - Agile Vision User
   - Product Vision Super-User
   - Product Vision User
   - Vision Super-User
   - Vision User

Install the New Package

Before you install, determine whether to install the package on the production or test environment.

The following table lists the access levels for each profile.

User Profile	Access Level
Agile Super-User	Agile Super-User
Agile User	Agile User
Requirements Super-User	Requirements Super-User
Requirements User	Requirements User
Agile/Requirements Super-User	Agile/Requirements Super-User
Agile/Requirements User	Agile/Requirements User

Follow these steps:

1. Log in as a system administrator to one of the following URLs:

   Production environment

   `https://login.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000Jwwk`

   Test environment

   `https://test.salesforce.com/packaging/installPackage.apexp?p0=04tA0000000Jwwk`

2. Verify the following information:

   Version Name

   Winter 2013

   Version Number

   4.1

   Publisher

   CA Technologies

3. Click Continue.

   The Handle Component Name Conflicts page appears.

   Note: This page appears only for an upgrade. For fresh installation, the process starts from the Approve Package API Access page.

4. Select Block installation and list conflicts, and click Next.

   The Approve Package API Access page appears.

5. Click Next.

   The Choose security level page appears.

6. Select the Select Security Settings option to set the user access by profile.

7. Set the access levels for each profiles as specified in the preceding table, and click Next.

   The Install Package page appears.

8. Click Install.

   The Processing page appears indicating that your request is in process. The installation can take over 30 minutes, depending on the current load for the Force.com platform.

When the installation completes, you will receive an 'Install Successful' email from Salesforce.com to the email address that you used to log in.

Verify the Installed Package

After you install the new package, the package is automatically deployed. Verify that the package is the correct version.

Follow these steps:

1. Log in to Salesforce.com as the system administrator.
2. From the CA Clarity Agile or CA Clarity Requirements home page, click Setup.

   The Personal Setup page opens in Salesforce.com.
3. Select Installed Packages from the App Setup menu.
4. Verify that package CA Clarity, Version 4.1 is installed.
5. Click Deploy in the Installed Package Detail section.

   The Deploy Package page appears showing the package components.
6. Click Deploy again.

Note: The date of the installation is not updated. The original date of the installation appears.

Specify the Licenses

Verify that the correct product licenses are enabled. By default, both CA Clarity Agile and CA Clarity Requirements are enabled. If you purchased the license for only one of these products, disable the other.

Follow these steps:

1. Enter the following URL in the address bar of your browser window:

   Production environment

   `https://ca-agile.na`*`xx`*`.visual.force.com/apex/PackageSettings`

   Test environment

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

   xx

   The instance number of the organization where the CA Clarity Agile and CA Clarity Requirements products are installed. You can find this value by logging in to the product and checking the value for xx in the homepage URL.

2. Choose one of the following options and click Save:
   - If you have a license only for CA Clarity Agile, clear the CA Clarity Requirements check box.
   - If you have a license only for CA Clarity Requirements, clear the CA Clarity Agile check box.
   - If you have licenses for both CA Clarity Agile and CA Clarity Requirements, leave both check boxes selected.

   You have now specified the correct CA Clarity Agile and CA Clarity Requirements Product licenses.

Update the User Profiles

Update the specified user profiles to ensure that all users have access to the User Story Completion Status chart.

Follow these steps:

1. Log in as an administrator at the following URL:
   `https://cavision.cloudforce.com`
2. Click Setup.
3. In the Administration Setup, expand Manage Users, and click Profiles.
4. Click Requirements User from the list of User Profiles.
5. Scroll to Enabled Visualforce Page Access, and click Edit.
6. Select AgilePlannerUserDetail from Available Visualforce Pages, and click Add.
7. Save your changes.

Update the Reports and Dashboards

The system administrator must update the Dashboards and Reports labels.

Follow these steps:

1. Log in as a system administrator and click Setup.
2. Click Dashboards and click Go to Dashboard List.
3. Click Edit for Vision Product Dashboard, enter the following information:

   Dashboard Folder Label

   CA Clarity Public Dashboard
4. Save your changes.
5. Click Edit for Agile Vision Dashboard.
6. Click Dashboard Properties, and enter the following information:

   Title

   CA Clarity Agile Dashboard
7. Save your changes.
8. Click Go to Dashboard List.
9. Click Edit for Product Vision Dashboard.
10. Click Dashboard Properties, and enter the following information:

    Title

    CA Clarity Requirements Dashboard
11. Save your changes.
12. Click Go to Dashboard List.
13. Click Edit for Vision Public Reports, and enter the following information:

    Report Folder Label

    CA Clarity Public Reports
14. Save your changes.
15. Click Edit for Sample Agile Vision Reports, and enter the following information:

    Report Folder Label

    Sample CA Clarity Reports
16. Save your changes.

Return to the CA Clarity Agile or CA Clarity Requirements home page to reschedule all jobs. You have successfully upgraded to the Winter 2013 release. Users can take advantage of the new features and enhancements.

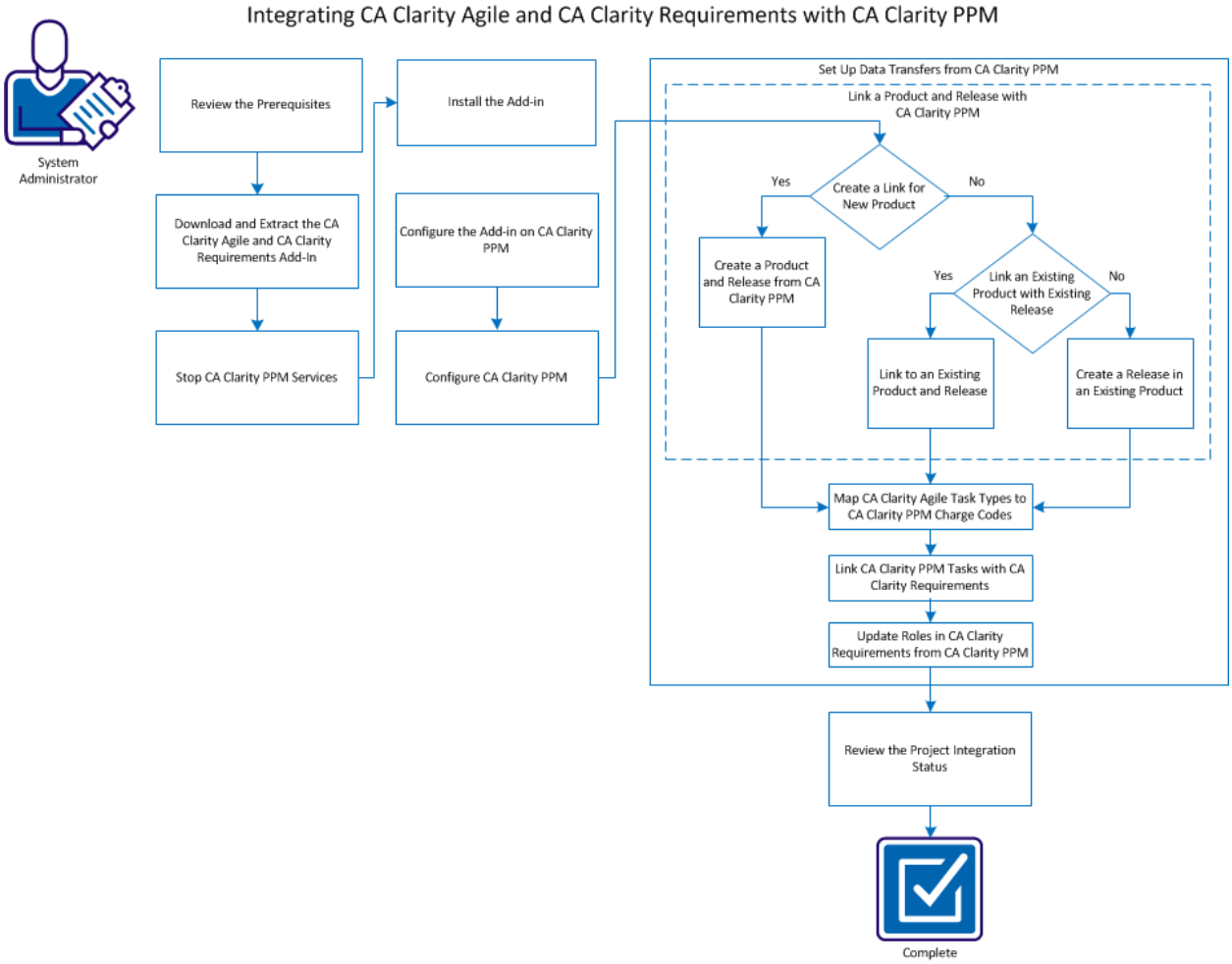
How to Integrate CA Clarity Agile and CA Clarity Requirements with CA Clarity PPM

As a system administrator, you can integrate CA Clarity Agile and CA Clarity Requirements with CA Clarity PPM. Using this integration, product owners can create and manage requirements in an agile environment while adhering to the traditional project governing process.

The integration allows the following capabilities:

- Create and manage CA Clarity Agile products and users from CA Clarity PPM.
- Associate requirements in CA Clarity Requirements with CA Clarity PPM tasks.
- Build the CA Clarity PPM work breakdown structure (WBS) from Agile sprints, kanban, user stories, and tasks.
- Auto-populate CA Clarity PPM timesheets using CA Clarity Agile task worklogs.
- Download roles from CA Clarity PPM for use in CA Clarity Requirements.
- Synchronization jobs can run in the background at predefined intervals to transfer information between CA Clarity Agile, CA Clarity Requirements, and CA Clarity PPM.

The following diagram describes how a system administrator can integrate CA Clarity Agile and CA Clarity Requirements with CA Clarity PPM.



To integrate CA Clarity PPM with CA Clarity Agile, CA Clarity Requirements, or both, follow these steps:

1. Review the prerequisites (see page 92).
2. Download and extract the CA Clarity Agile and CA Clarity Requirements add-in (see page 92).
3. Stop the CA Clarity PPM services (see page 93).
4. Install the add-in (see page 93).
5. Configure the add-in on CA Clarity PPM (see page 93).
6. Configure CA Clarity PPM (see page 97).
7. Set up data transfers from CA Clarity PPM (see page 99).
8. Review the project integration status (see page 106).

Review the Prerequisites

Before you integrate CA Clarity Agile and CA Clarity Requirements with CA Clarity PPM, make sure that CA Clarity Agile and CA Clarity Requirements licenses are available.

Download and Extract the CA Clarity Agile and CA Clarity Requirements Add-In

You can download the required files from support.ca.com to your computer or an accessible network location. The files contain the required installation scripts.

Follow these steps:

1. Download and unzip the GEN11141340E.zip file available from support.ca.com.
2. Download the wsc_java15.jar file from the following URL:
   http://sfdc-wsc.googlecode.com/files/wsc_java15.jar
3. Copy the wsc_java15.jar file to the <*Clarity installation directory*>/lib directory on the CA Clarity PPM application server where you are planning to complete the installation process.
4. Copy the following files to the <*Clarity installation directory*>/lib directory on the CA Clarity PPM application server.

   avee.1.6.0.0172.v12.jar

   For v12 CA Clarity PPM

   avee.1.6.0.0172.v13.jar

   For v13 CA Clarity PPM

   The .jar file includes the following files:

   installation script

   The .jar file iX installation script.

   install.bat

   The Windows installation script.

   install.xml

   The Ant installation script includes the following files:

   install.sh

   The UNIX installation script.

   package

   The directory of updated files.

   tools

   The directory of supporting files.

Stop the CA Clarity PPM Services

Before you install the add-in, stop the CA Clarity PPM application (app) and background (bg) services to avoid any problem.

Follow these steps:

1. Log in to Clarity System Administration (NSA).
2. Stop the CA Clarity PPM application (app) and background (bg) services.

Install the Add-in

After you have stopped the CA Clarity PPM application and background services, Install the add-in to update the objects, reports, and database.

Important! Back up your CA Clarity PPM installation before installing this add-in so that you can restore the application to the prior version if necessary. When you install an add-in, you can overwrite your customized views for out-of-the-box CA Clarity PPM objects, such as projects. If your organization has customized views, carefully consider the installation in a test environment before installing this add-in into your production environment. Once you have installed the add-in, you cannot uninstall it.

Follow these steps:

1. Open a command prompt window in the directory where you extracted the .jar files and provide the following command:
   `install`
2. Press Enter.
3. Follow the on-screen directions to complete the add-in installation.

Configure the Add-in on CA Clarity PPM

You can configure the CA Clarity Agile and CA Clarity Requirements add-in on CA Clarity PPM, so that the add-in subpages are available on CA Clarity PPM. You can follow one of the following instructions:

- Configure a new installation of CA Clarity Agile and CA Clarity Requirements add-in (see page 94).
- Configure CA Clarity Agile and CA Clarity Requirements add-in upgrade (see page 95).

Configure a New Installation of CA Clarity Agile and CA Clarity Requirements Add-in

For a fresh installation of CA Clarity Agile and CA Clarity Requirements add-in for CA Clarity PPM, you can use the following instructions to configure.

Follow these steps:

1. Log in to Clarity System Administration (NSA).
2. Restart the CA Clarity PPM application (app) and background (bg) services.
3. Log in to the CA Clarity PPM application and access the Administration Tool.
4. Select Objects from the CA Clarity Studio menu.
5. Filter using the Object Name as Project.

   The objects list appears.
6. Click the Project object to open it.
7. Click Views in the content menu. Click the Layout: Edit link for the Project Properties view.

   The property layout appears.
8. Expand the Agile and Requirements project properties and then expand the Integration Status section.
9. Click the Properties and Layout icon for the Integration Status section.

   The section properties appear.
10. Click Save and Return.

    The property layout appears.
11. Click Back.

    The object definition view appears.
12. Click Publish to publish the view.

    A confirmation prompt appears.

13. Click Yes to confirm publishing the view.
14. Click Home, and from Personal, click Reports and Jobs.
15. Select Scheduled Jobs from Jobs tab.
16. Reschedule the following jobs to run at the predefined levels:
    - Agile and Requirements Product Sync
    - Agile Worklog Sync
    - Requirements and Task Mapping Sync
    - Requirements Role Sync
17. Select Processes from the Data Administration menu.

    The available processes list appears.
18. Click open the following processes and then click Validation from the content menu:
    - Agile and Requirements Fields Locking
    - Create Requirements Mapped Task
    - Populate Agile Task Types
    - Requirements Sync Project and Task Information
19. Select all the validation objects and click Validate All and Activate.

    When validation completes, the status of the objects changes to Validated and mode changes to Active.
20. Restart the Clarity app and bg services.

Configure the CA Clarity Agile and CA Clarity Requirements Add-in Upgrade

If you are upgrading CA Clarity Agile and CA Clarity Requirements add-in for CA Clarity PPM, you can use the following instructions to configure.

Follow these steps:

1. Log in to Clarity System Administration (NSA).
2. Restart the CA Clarity PPM application (app) and background (bg) services.
3. Log in to the CA Clarity PPM application and access the Administration Tool.
4. Click Home, and from Personal, click Reports and Jobs.
5. Select Scheduled Jobs from Jobs tab.

6. Delete the following scheduled jobs:
   - Agile and Requirements Product Sync
   - Agile Timesheet Sync
   - Requirements and Task Mapping Sync
   - Requirements Role Sync
7. Click Organizer from Home.
8. Click Processes tab, and click Initiated.
9. Select the following processes and click Cancel Process:
   - Agile and Requirements Fields Locking
   - Create Requirements Mapped Task
   - Populate Agile Task Types
   - Requirements Sync Project and Task Information
10. Click Add-Ins from Studio.
11. Click Agile and Requirements.
12. Select all and click Apply.
13. Click Yes and wait for the process to complete.

    The Add-In Details page displays the status for all the items as installed.
14. Select Processes from the Data Administration.

    The available processes list appears.
15. Click open the following processes and then click Validation tab:
    - Agile and Requirements fields Locking
    - Create Requirements Mapped Task
    - Populate Agile Task Types
    - Requirements Sync Project and Task Information
16. Select all the validation objects and click Validate All and Activate.

    When validation completes, the status of the objects changes to Validated and mode changes to Active.
17. Select Objects from the Studio menu.
18. Filter using the object name as Project.

    The objects list appears.
19. Click the Project object to open it.
20. Click Views and click [Fields] for the Project Properties.

    The Project Properties - property fields displays.

21. Change the property label of Linked to CA Vision to Linked to Agile and Requirements.
22. Click Save and Return.

    The object definition view appears.
23. Click Publish to publish the view.

    A confirmation prompt appears.
24. Click Yes to confirm publishing the view.
25. Reschedule the following jobs to run at the predefined levels:
    - Agile and Requirements Product Sync
    - Agile Worklog Sync
    - Requirements and Task Mapping Sync
    - Requirements Role Sync
26. Restart the Clarity app and bg services.

Configure CA Clarity PPM

You can set up CA Clarity PPM to link to CA Clarity Agile or CA Clarity Requirements, so that they can communicate and transfer data.

Follow these steps:

1. Log in to the CA Clarity PPM and access the Administration Tool.
2. Select Agile and Rqmts Setup from the General Settings menu.

   The admin settings page appears.
3. Complete the following fields in the Agile and Requirements Login Info section:

   User Name

   Defines the user name for logging in to CA Clarity Agile with system administrator privileges.

   Password

   Defines the password for logging in to CA Clarity Agile with system administrator privileges.

Security Token

Defines the security token used for server identification in case the login fails or if the CA Clarity PPM server is running from an untrusted network. You can retrieve this token from SalesForce.com from the Personal Setup Page. See the SalesForce.com online help for more information.

Agile and Requirements Environment URL

Specifies the URL that CA Clarity PPM uses to access the CA Clarity Agile or CA Clarity Requirements production or sandbox environment.

Agile and Requirements URL

Specifies the URL that CA Clarity PPM uses to access the requirements list in CA Clarity Requirements.

4. Complete the following fields in the Proxy Server Info section:

Host Name

Defines the proxy server host name.

Port

Defines the proxy server port.

User Name

Defines the proxy server user name.

Password

Defines the proxy server password.

5. Save your changes.

Set Up Data Transfers from CA Clarity PPM

To set up data transfers, specify the CA Clarity Agile or CA Clarity Requirements product details in a CA Clarity PPM project that you have associated. The following tasks show how to set up data transfers:

- Link CA Clarity Agile and CA Clarity Requirements Product and Release with CA Clarity PPM by one the following methods:
  - Create a product and release from CA Clarity PPM (see page 100).
  - Link to an existing product and release in CA Clarity Agile and CA Clarity Requirements (see page 102).
  - Create a release in an existing CA Clarity Agile and CA Clarity Requirements product (see page 103).
- Map CA Clarity Agile task types to CA Clarity PPM charge codes (see page 103).
- Link CA Clarity PPM tasks with CA Clarity Requirements (see page 104).
- Update Roles in CA Clarity Requirements from CA Clarity PPM (see page 105)

The following rules apply for linking projects between CA Clarity PPM and CA Clarity Agile or CA Clarity Requirements:

- If you specify a product ID and a release name but leave the release ID blank, a new release is created for the specified product.
- If you specify both product and release IDs and names, the names are ignored and the IDs are used for linking to an existing product.
- The CA Clarity PPM project description is added as the description for the product or release when creating a product or release. A superuser can change this description, and can avoid having it overwritten from CA Clarity PPM.
- If you leave all the fields blank, the synchronization job fails and nothing is created or linked in CA Clarity Agile.

Best Practice: To link a CA Clarity PPM project to CA Clarity Agile or CA Clarity Requirements, verify the following prerequisites:

- The option for automatic creation of effort tasks is turned off.
- No tasks currently exist in the CA Clarity PPM project.

Create a Product and Release from CA Clarity PPM

You can create a project in CA Clarity PPM, and specify the product name and release name in the project. When the synchronization job runs, a release in CA Clarity Agile or CA Clarity Requirements is created.

Follow these steps:

1. Log in to CA Clarity PPM.
2. Select Projects from the Portfolio Management menu.

   The projects list page appears.
3. Click New to create a project, complete the required fields, and click Save.

   The properties page appears.
4. Select the Linked to Agile and Requirements check box and click Save.

   Two Agile and Requirements options become available in the content menu.
5. Click Agile and Requirements from the content menu.

   The Agile and Requirements properties page appears.
6. Complete the following fields:

   Agile and Requirements Product Name

   Defines the name of the new CA Clarity Agile and CA Clarity Requirements product you want to create.

   Agile and Requirements Release Name

   Defines the name of the new CA Clarity Agile and CA Clarity Requirements release you want to create.

   Product Prefix

   Defines a unique prefix to add to the product name for the user stories and tasks. You cannot change the prefix after the product is created.

   Limits: 6 characters

   Note: Leave the following fields blank: Agile and Requirements Product ID and Agile and Requirements Release ID.

7. Submit your changes.

   After the Agile and Requirements Project Sync job runs, the following fields are automatically populated in CA Clarity PPM. The new product and release is created in CA Clarity Agile and/or CA Clarity Requirements:

   Agile and Requirements Product ID

   Displays the Agile and Requirements product ID. This value is automatically populated from CA Clarity Agile or CA Clarity Requirements.

   Source: Product ID field on the Product Detail page on CA Clarity Agile or CA Clarity Requirements.

   Agile and Requirements Release ID

   Displays the Agile and Requirements release ID. This value is automatically populated from CA Clarity Agile or CA Clarity Requirements.

   Source: Release ID field on the Release Detail page on CA Clarity Agile or CA Clarity Requirements.

Link to an Existing Product and Release

You can link an existing CA Clarity Agile and CA Clarity Requirements product and release to a CA Clarity PPM project by specifying the product ID and release ID. You can link to a product release or a master release. Link to a master release to see all the user stories and tasks that are assigned to the master release in CA Clarity PPM.

Follow these steps:

1. In CA Clarity PPM, open a project that you want to associate with a Agile and Requirements product.

   The project properties appear.

2. Select the Linked to Agile and Requirements checkbox and click Save.

3. Click Agile and Requirements from the content menu.

   The Agile and Requirements properties page appears.

4. Complete the following fields:

   - Agile and Requirements Product ID
   - Agile and Requirements Release ID
   - Agile and Requirements Master Release ID

     Defines the release ID for an existing master release. This value is used to link this project to an existing master release in CA Clarity Agile or CA Clarity Requirements. If the link is established successfully, this field becomes display-only.

     Source: Master Release ID field on the Master Release Detail page in CA Clarity Agile or CA Clarity Requirements.

     Note: Leave this field blank, if you are linking to a product release instead of a master release.

   Note: Leave the following fields blank: Agile and Requirements Product Name, Agile and Requirements Release Name, and Product Prefix.

5. Submit your changes.

   After the Agile and Requirements Product Sync job runs, the following fields are automatically populated in CA Clarity PPM:

   - Agile and Requirements Product Name
   - Agile and Requirements Release Name
   - Product Prefix

Create a Release in an Existing Product

Create a release in an existing CA Clarity Agile or CA Clarity Requirements product by specifying the product ID and release name in the CA Clarity PPM project. Leave the release ID, product name, and product prefix values undefined.

Follow these steps:

1. In CA Clarity PPM, open the project and associate it with CA Clarity Agile and CA Clarity Requirements by selecting the Linked to Agile and Requirements checkbox and clicking Save.

   The project properties appear.

2. Click Agile and Requirements from the content menu.

   The Agile and Requirements properties page appears.

3. Complete the following fields:

   - Agile and Requirements Product ID
   - Agile and Requirements Release Name

   Note: Leave the following fields blank: Agile and Requirements Release ID, Agile and Requirements Product Name, and Product Prefix.

4. Submit your changes.

   After the Agile and Requirements Product Sync job runs, the following fields are automatically populated in CA Clarity PPM:

   - Agile and Requirements Release ID
   - Agile and Requirements Product Name
   - Product Prefix

Map CA Clarity Agile Task Types to CA Clarity PPM Charge Codes

If you have assigned charge codes to your project tasks in CA Clarity PPM, you can map these charge codes to the CA Clarity Agile task types. Mapping the task types to charge codes allows you to assign appropriate charge codes to actuals on linked tasks. A project manager can also map task types to charge codes and run the Populate CA Clarity Agile Task Types process, if they have the following global and instance access rights:

- *Task Type and Charge Code Mapping - Create*
- *Task Type and Charge Code Mapping - Edit All*
- *Process - Start*

Best practices:

- If you accidentally delete charge code mappings, run the Populate CA Clarity Agile Task Types process manually to retrieve the deleted mappings.

  See the CA Clarity PPM *Administration Guide* for more information.

- You can map a task type to only one charge code. If no task type is defined for a task in CA Clarity Agile, you can assign the Default charge code to it in CA Clarity PPM.

Follow these steps:

1. In CA Clarity PPM, open the linked project.

   The project properties appear.

2. Click Agile Task Type Mapping from the content menu.

   The CA Clarity Agile task type and charge code mapping page appears.

3. Click New.

   The create mapping page appears.

4. Complete the following fields and submit:

   Task Type

   Defines the CA Clarity Agile task type for a task.

   Charge Code

   Defines the CA Clarity PPM charge code for the same task.

Link CA Clarity PPM Tasks with CA Clarity Requirements

You can link CA Clarity PPM tasks with requirements from CA Clarity Requirements. You can link multiple tasks to a single requirement, and you can link multiple requirements to a single task. The CA Clarity Requirements requirements that you want to link must be available to CA Clarity PPM for selection. Verify that the *Agile and Requirements Product Sync* job has run since any requirements were added, and you have the following CA Clarity PPM access rights:

- *Mapped Task - Create*
- *Mapped Task - Edit All*
- *CA Clarity Requirements - Create*
- *CA Clarity Requirements - Edit All*
- *Requirement and Task Mapping - Create*
- *Requirement and Task Mapping - Edit All*

Follow these steps:

1. In CA Clarity PPM, open the linked project.

   The project properties appear.

2. Click the Tasks tab and click the Work Breakdown Structure tab.

3. Locate the task and click the icon in the Mapped Requirements column.

   The *Mapped Task: Properties* page appears with the Requirement and Task Mapping List option selected in the content menu.

4. Click New.

   The *Create Requirement and Task Mapping* page appears.

5. Click the Browse icon and select a CA Clarity Requirements requirement to map to the task.

6. Click Save.

   The *Mapped Task: Properties* page appears with the requirement listed.

   Note: After the requirement is added to the task, populate the requirement list with the CA Clarity Requirements requirement information. If the list is empty, refresh the page.

7. Choose one of the following options:

   - Click New to map another requirement to the task.
   - Click the Task WBS icon for the requirement to return to the Work Breakdown Structure.

   CA Clarity Requirements is updated with the information about linked tasks and requirements the next time the *Requirements and Task Mapping Sync* job runs.

   Note: The sync job does not synchronize the requirement version number and the version status from CA Clarity Requirements to CA Clarity PPM.

Update Roles in CA Clarity Requirements from CA Clarity PPM

You can download roles and role hierarchies from CA Clarity PPM to CA Clarity Requirements. When you download roles, all roles in CA Clarity PPM are available in CA Clarity Requirements.

To update roles in CA Clarity Requirements from CA Clarity PPM roles, run the Requirements Role Sync job.

Review the Project Integration Status

Review the integration status from the Agile and Requirements properties page after linking a CA Clarity PPM project to CA Clarity Agile and CA Clarity Requirements.

Follow these steps:

1. In CA Clarity PPM, open the project and click Agile and Requirements from the content menu.

   The Agile and Requirements properties page appears.

2. Review the information in the following fields:

   Sync Status

   Displays the status of the Agile and Requirements Project Sync job as successful, pending, or failed.

   Sync Detail Information

   Displays the details of the job status such as date and time when it was last run. If the job failed, displays details of the errors encountered.

A successful integration means that data is transferring between CA Clarity Agile and CA Clarity Requirements, and CA Clarity PPM. If the integration is not successful, it can mean one of the following issues:

- The Salesforce.com or CA Clarity Agile credentials are incorrect on the admin setup page.
- The Salesforce.com network is down.
- The CA Clarity Agile and CA Clarity Requirements product or release IDs are entered incorrectly.
- The CA Clarity Agile and CA Clarity Requirements product that you are trying to create exists.
- The CA Clarity Agile and CA Clarity Requirements release is already linked to another CA Clarity PPM project.

If any information is entered incorrectly, try integrating again by reentering the correct values and running the Agile and Requirements Product Sync job.