

CA Clarity™ PPM

Requirements Planning User Guide

v13.0.00



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Chapter 1: Requirements Planning Overview

This section contains the following topics:

[What is Requirements Planning](#) (see page 9)

[How Requirements Planning Works](#) (see page 9)

What is Requirements Planning

The Requirements Planning module provides you with a framework to define and track the deliverable requirements of your business. Use requirements planning to capture your business values in the form of requirements. Then, associate the requirements with other investments and initiatives to flow into the planning cycles. The Requirements Planning module provides insight into how requirements fit into your overall business processes and goals.

Requirements Planning includes:

- Requirements. Use requirements to define your organization needs.
- Releases. Use releases to represent new future deliverables.
- Release Plans. Release plans provide you with an intuitive and quick way to assign requirements across upcoming releases on a per-investment basis. Use release plans to map one or more requirements to a release.

How Requirements Planning Works

The following is a workflow of how requirements planning works:

1. [Create the requirements](#) (see page 12).
2. [Create the releases](#) (see page 36).
3. [Create the release plan](#) (see page 49).
4. [Add the releases to the release plan](#) (see page 55).
5. Do one of the following:
 - [Add the requirements to the release plan](#) (see page 56).
 - [Add the requirements to the release](#) (see page 46).
6. [Approve the release](#) (see page 41).

Chapter 2: Requirements

This section contains the following topics:

[About Requirements](#) (see page 11)

[How to Work with Requirements](#) (see page 12)

[How to Work with Requirement Properties](#) (see page 16)

[Define Requirement Effort Budget and Estimates](#) (see page 25)

[Define Requirement Cost Budget and Estimates](#) (see page 26)

[Requirement Hierarchy](#) (see page 27)

[Requirement Dependencies](#) (see page 31)

[Delete Requirements](#) (see page 33)

About Requirements

Requirements in CA Clarity PPM represent the customer needs. A requirement includes:

- **Properties.** You can define the attributes of your requirements that drive your planning cycle decisions.
- **Hierarchy.** Requirements represent a list of the items for your organization to deliver. Manage them as individual requests or group and associate them within a hierarchy of requirements.
- **Dependencies.** You can indicate dependency relationships that exist between requirements. A dependency can occur when a requirement must be completed before another one. Or, two requirements can be mutually dependent.
- **Processes.** You can create and run requirement-related processes. You can build your own processes for requirements.

See the *CA Clarity Basics User Guide* for more information.

- **Audit Trail.** You can record changes to field-level attributes in an audit trail log.

See the *CA Clarity Basics User Guide* for more information.

How to Work with Requirements

You can use the Requirements list page to:

- [Create a requirement](#) (see page 12).
- [View a list of requirements](#) (see page 16).
- [Open a requirement](#) (see page 16).
- [Approve a requirement](#) (see page 21).
- [Reject a requirement](#) (see page 21).
- [Delete a requirement](#) (see page 33).

Do the following to work with requirements:

1. [Create the requirement](#) (see page 12).
2. [Set the requirement business priorities](#) (see page 21).
3. [Define the requirement effort budget and estimates](#) (see page 25).
4. [Define the requirement cost budget and estimates](#) (see page 26).
5. Once you create the release plan and the release, do one of the following:
 - [Add the requirements to the release plan](#) (see page 56).
 - [Add the requirements to the release](#) (see page 46).
6. Once you have approved the release, [link the requirement to a project task](#) (see page 24).
7. Deliver the requirement.
8. [Change the requirement status to "Implemented"](#) (see page 21).

Create Requirements

You can complete the basic requirement data using the Create Requirement page. You can edit the requirement details, such as the general properties.

Note: You can also create new requirements from within a requirement hierarchy.

Follow these steps:

1. Open Home, and from Requirements Planning, click Requirements.
The list page appears.
2. Click New.
The create page appears.

3. Complete the following fields, and click Save and Return:

Title

Defines the requirement name or title.

Required: Yes

ID

Defines the requirement unique identifier.

Required: Yes

Type

Defines the requirement type.

Values: Feature, Requirement, and User Story

Default: Undefined

Theme

Defines the requirement theme.

Values: Architecture, Competition, Customer Satisfaction, Integrations, New Feature, and Quality

Default: Unspecified

Detailed Description

Defines the requirement detailed description.

Requirement Manager

Defines the name of the individual responsible for delivering the requirement within your organization.

Status

Defines the requirement status.

Values: New, Need Additional Information, In Pipeline, Active Candidate, Assigned to a Release, Approved, Implemented, Duplicate, Rejected, and Draft

Default: Unspecified

Committed

Specifies that the requirement must be delivered to satisfy an organizational commitment to a group or individual.

Default: Cleared

Risk

Defines the requirement risk.

Values:

- Low. The requirement objectives, scope, and benefits are reasonable, clearly defined, measurable, and verifiable.
- Medium. The requirement objectives, scope, and benefits are fairly reasonable, clearly defined, measurable, and verifiable.
- High. The requirement objectives, scope, and benefits are not reasonable, clearly defined, measurable, and verifiable.

Default: Unspecified

Requested By

Defines the group or organization requesting the requirement.

Values: Beta Customer, Customer, Focus Group, Pre-Sales, and Sales

Default: Unspecified

Investment

Specifies the name of the investment that owns the requirement.

Release

Defines the name of release associated with the requirement. The releases available for selection are associated with the investment owning the requirement.

4. In the Effort section, define the budgeted and estimated effort for the requirement.

Effort (Budget)

Defines your organization budgeted effort amount to deliver the requirement.

Effort (Estimate)

Defines your organization estimated effort to deliver the requirement.

5. In the Cost section, define the various budgeted and estimated operating expenses and capital.

Operating Expense (Budget)

Defines the requirement budgeted portion of the total cost for operating expenses.

Capital (Budget)

Defines the requirement budgeted portion of the total cost for capital expenses.

Total (Budget)

Displays the requirement total budgeted cost, based on the following formula:

$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$

Operating Expense (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Capital (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Total (Estimate)

Displays the total requirement estimated cost uses the following formula:

$\text{Total (Estimate)} = \text{Operating Expense (Estimate)} + \text{Capital (Estimate)}$

Aggregate Operating Expense (Estimate)

The aggregated requirement including child requirement estimate of the total cost for operating expenses is based on the following formula:

$\text{Aggregate Operating Expense (Estimate)} = \text{Operating Expense (Estimate)} + \text{Child Requirement Operating Expense (Estimate)}$

Aggregate Capital (Estimate)

The aggregated requirement estimate of the total cost for capital expenses is based on the following formula:

$\text{Aggregate Capital (Estimate)} = \text{Capital (Estimate)} + \text{Child Requirement Capital (Estimate)}$

Aggregate Total (Estimate)

The total requirement aggregated cost inclusive of child requirements is based on the following formula:

$\text{Aggregate Total (Estimate)} = \text{Aggregate Operating Expense (Estimate)} + \text{Aggregate Capital (Estimate)}$

6. In the Organizational Breakdown Structures section, define the OBS you want to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the requirement. The department requires to belong to the same entity as the location.

Location

Defines the location of the financial department associated with the requirement. The location requires to belong to the same entity as the department.

Your new requirement displays in the requirements list.

View and Open Requirements

You can view a list of requirements on the Requirements list page, and open a specific requirement.

Note: You can also view requirements from the requirement hierarchy.

Follow these steps:

1. Open Home, and from Requirements Planning, click Requirements.
The list page appears.
2. Click the name of the requirement.
The general page appears.

How to Work with Requirement Properties

Use the Requirement: Properties - General page to:

- [Edit the requirement general properties](#) (see page 17).
- [Associate the requirement to an investment](#) (see page 20).
- [Edit the requirement status](#) (see page 21).
- [Define the requirement effort budget and estimates](#) (see page 25).
- [Define the requirement cost budget and estimates](#) (see page 26).
- [Set the requirement business priorities](#) (see page 21).
- [Add an attachment to the requirement](#) (see page 23).
- [Link the requirement to a project task](#) (see page 24).
- [Unlink the requirement from a project task](#) (see page 24).

Edit Requirement General Properties

When you open a requirement, the default Requirement: Properties - General page displays. You can edit the fields displayed on the page.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Define the following fields, and save:

Title

Defines the requirement name or title.

Required: Yes

ID

Defines the requirement unique identifier.

Required: Yes

Theme

Defines the requirement theme.

Values: Architecture, Competition, Customer Satisfaction, Integrations, New Feature, and Quality

Default: Unspecified

Detailed Description

Defines the requirement detailed description.

Requirement Manager

Defines the name of the individual responsible for delivering the requirement within your organization.

Status

Defines the requirement status.

Values: New, Need Additional Information, In Pipeline, Active Candidate, Assigned to a Release, Approved, Implemented, Duplicate, Rejected, and Draft

Default: Unspecified

Committed

Specifies that the requirement must be delivered to satisfy an organizational commitment to a group or individual.

Default: Cleared

Risk

Defines the requirement risk.

Values:

- Low. The requirement objectives, scope, and benefits are reasonable, clearly defined, measurable, and verifiable.
- Medium. The requirement objectives, scope, and benefits are fairly reasonable, clearly defined, measurable, and verifiable.
- High. The requirement objectives, scope, and benefits are not reasonable, clearly defined, measurable, and verifiable.

Default: Unspecified

Requested By

Defines the group or organization requesting the requirement.

Values: Beta Customer, Customer, Focus Group, Pre-Sales, and Sales

Default: Unspecified

Investment

Specifies the name of the investment that owns the requirement.

Release

Defines the name of release associated with the requirement. The releases available for selection are associated with the investment owning the requirement.

Unassigned

Specifies whether this requirement has been added to a release. Once you add the requirement to a release, this check box is cleared.

Default: Selected

Various

Specifies that the child requirements added to a release differ from the release the parent requirements are added.

Default: Cleared

Associated Task

Displays the name of the project task linked to the requirement. The requirement can only be linked to one task.

3. In the Effort section, define the budgeted and estimated effort for the requirement.

Effort (Budget)

Defines your organization budgeted effort amount to deliver the requirement.

Effort (Estimate)

Defines your organization estimated effort to deliver the requirement.

4. In the Cost section, define the various budgeted and estimated operating expenses and capital.

Operating Expense (Budget)

Defines the requirement budgeted portion of the total cost for operating expenses.

Capital (Budget)

Defines the requirement budgeted portion of the total cost for capital expenses.

Total (Budget)

Displays the requirement total budgeted cost, based on the following formula:

$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$

Operating Expense (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Capital (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Total (Estimate)

Displays the total requirement estimated cost uses the following formula:

$\text{Total (Estimate)} = \text{Operating Expense (Estimate)} + \text{Capital (Estimate)}$

Aggregate Operating Expense (Estimate)

The aggregated requirement including child requirement estimate of the total cost for operating expenses is based on the following formula:

$\text{Aggregate Operating Expense (Estimate)} = \text{Operating Expense (Estimate)} + \text{Child Requirement Operating Expense (Estimate)}$

Aggregate Capital (Estimate)

The aggregated requirement estimate of the total cost for capital expenses is based on the following formula:

$\text{Aggregate Capital (Estimate)} = \text{Capital (Estimate)} + \text{Child Requirement Capital (Estimate)}$

Aggregate Total (Estimate)

The total requirement aggregated cost inclusive of child requirements is based on the following formula:

$\text{Aggregate Total (Estimate)} = \text{Aggregate Operating Expense (Estimate)} + \text{Aggregate Capital (Estimate)}$

5. In the Organizational Breakdown Structures section, define the OBS you want to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the requirement. The department requires to belong to the same entity as the location.

Location

Defines the location of the financial department associated with the requirement. The location requires to belong to the same entity as the department.

Specify the Investment that Owns Requirements

You can indicate the product, application, asset, service, project, or program that represents the eventual delivery of the requirement. The relationship provides a mechanism to group related requirements for a specific investment. You can only define one investment as the owner of a requirement.

You can define this relationship when you first create the requirement, on the Create Requirement page, and using the Requirement: Properties - General page. The investment you define on this page serves as the owner of the requirement.

Example

You can have a list of requirements that describe new features for a product. Define the product investment as the owner of the requirement. Defining is a method of tracing requirements from planning to implementation phases.

Follow these steps:

1. Open the requirement.
The general page appears.
2. In the General section of the page, select a value for the Investment field.
The investment name is displayed next to the Investment field.
3. Save the changes.

Edit Requirement Status

Define the status of requirements as they pass through the lifecycle. Use the Status field on the Requirement: Properties - General page to view and edit its status.

Note: You can also approve or reject requirements using the Requirements list page.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Define the following fields, and save:

Status

Defines the requirement status.

Values: New, Need Additional Information, In Pipeline, Active Candidate, Assigned to a Release, Approved, Implemented, Duplicate, Rejected, and Draft

Default: Unspecified

Set Requirement Business Priorities

Typically, a panel of key stakeholders reviews the requirements for an upcoming release. The stakeholders analyze the requirements and rank them after discussing the priorities. The rankings are edited and the overall priority is calculated immediately. The ability to see the candidate requirements and edit the ratings for each requirement for each stakeholder is important to assess a requirement business impact.

You can define the requirement business priorities using the Requirement: Properties - Business Priority page. Assess the priority and graphically represent the overall business priority on the Requirements page.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Open the Properties menu, click Business Priority, and complete the following fields:

Overall Priority

Displays the overall requirement priority based on a weighted average formula based on rankings for the various priorities.

Innovation & User Experience

Defines the requirement business priority for innovation and user experience.

Values:

- Low. Range 1-33
- Medium. Range 34-67
- High. Range 68-100

Default: Unassigned

Revenue Impact

Defines the requirement business priority for revenue impact.

Values:

- Low. Range 1-33
- Medium. Range 34-67
- High. Range 68-100

Default: Unassigned

Developer Productivity

Defines the requirement business priority for developer productivity.

Values:

- Low. Range 1-33
- Medium. Range 34-67
- High. Range 68-100

Default: Unassigned

Cost of Operations & Support

Defines the requirement business priority for cost of operations and support.

Values:

- Low. Range 1-33
- Medium. Range 34-67
- High. Range 68-100

Default: Unassigned

3. Save the changes.

Add Attachments to Requirements

You can store documents related to the requirement using the Requirement: Properties - Attachments page. For example, initial requirements document, detailed requirements document, detailed design document that describes the functionality or scope of the requirement.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Open the Properties menu, and click Attachments.
The attachments page appears.
3. Define the following field, and save:

Attachment

Defines the path of the document you want to attach to this requirement. Click the Browse icon to find and attach a document for others to view.

Link Requirements to Project Tasks

You can link the requirement to the project task that represents the effort to deliver this requirement as part of an implementation project. The linked project task is a separate relationship from the investment that owns the requirement. You can link a requirement to a task that is already linked to other requirements. However, you can only link a requirement to a single task.

When you link a requirement to a project task, the requirement is assigned to and associated with the task. You can initiate this relationship only from within the requirement.

Important! If you delete the associated task, the requirement is no longer associated with the project task. The requirement is not deleted.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Link.
3. Click one of the following, and click Next:
 - Click Existing. Specifies selecting an existing task for the project.
 - Create New. Specifies the option to create a task.
4. Follow the instructions to link to a task.
The requirement is linked to the project task. The name of the project and task is displayed in the Associated Task field on the general page.

Unlink Requirements from Project Tasks

You can unlink a requirement from the project task. View the project task linked to your requirement in the Associated Task field on the requirement properties page. If the field is blank, the requirement is not linked to a project task.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Unlink.
The requirement is unlinked from the project task. The name of the project and task no longer display in the Associated Task field on the properties page.

Define Requirement Effort Budget and Estimates

Define the requirement effort properties using the Effort section on the requirement properties page.

The budgeted effort amount displayed on the page is the requirement budgeted effort. The effort does not aggregate up or down the hierarchy of requirements, but is used in the top-down planning cycles. The effort represents the effort allocated to deliver the requirement.

The estimated effort is the aggregated one for the hierarchy of requirements. Effort estimates are used in bottom-up scoping cycles and represent the planned work to deliver a requirement. The total effort estimates include the estimated requirement effort plus its descendant requirement effort estimates.

The work effort default display unit is recorded in hours. The CA Clarity PPM administrator defines the work effort display unit.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Define the following fields in the Effort section of the page, and save:

Effort (Budget)

Defines your organization budgeted effort amount to deliver the requirement.

Effort (Estimate)

Defines your organization estimated effort to deliver the requirement.

Aggregate Effort (Estimate)

The total requirement includes the estimated child requirement effort to deliver the requirement. The formula is:

Aggregate Effort (Estimate) = Effort (Estimate) + Child Requirement Effort (Estimate)

Define Requirement Cost Budget and Estimates

You can define your requirement cost properties using the Cost section on the requirement properties page.

The budgeted cost amount is the allocated cost to deliver the requirement. The budgeted cost does not aggregate up or down the hierarchy of requirements, but is used in top-down planning cycles.

The estimated cost amount is aggregated costs of the requirements hierarchy. Cost estimates are used in bottom-up scoping cycles and represent planned cost to deliver a requirement. The aggregated includes the descendant requirements cost estimates.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Define the following fields in the Cost section of the page, and save:

Operating Expense (Budget)

Defines the requirement budgeted portion of the total cost for operating expenses.

Capital (Budget)

Defines the requirement budgeted portion of the total cost for capital expenses.

Total (Budget)

Displays the requirement total budgeted cost, based on the following formula:
$$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$$

Currency Code

Defines the currency to calculate the requirement budget and estimate values.

Operating Expense (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Capital (Estimate)

Defines the requirement estimated portion of the total cost for operating expenses.

Total (Estimate)

Displays the total requirement estimated cost uses the following formula:
$$\text{Total (Estimate)} = \text{Operating Expense (Estimate)} + \text{Capital (Estimate)}$$

Aggregate Operating Expense (Estimate)

The aggregated requirement including child requirement estimate of the total cost for operating expenses is based on the following formula:

Aggregate Operating Expense (Estimate) = Operating Expense (Estimate) + Child Requirement Operating Expense (Estimate)

Aggregate Capital (Estimate)

The aggregated requirement estimate of the total cost for capital expenses is based on the following formula:

Aggregate Capital (Estimate) = Capital (Estimate) + Child Requirement Capital (Estimate)

Aggregate Total (Estimate)

The total requirement aggregated cost inclusive of child requirements is based on the following formula:

Aggregate Total (Estimate) = Aggregate Operating Expense (Estimate) + Aggregate Capital (Estimate)

Requirement Hierarchy

You can group requirements into requirement hierarchies.

Example

A requirement to deliver a new phone comprises requirements that describe the features of the phone. Each of the requirements is split into sub-requirements. Together, the requirements form a hierarchy that represents the new phone.

See the *CA Clarity Basics User Guide* for more information.

How to Work with Requirement Hierarchies

You can use the requirement hierarchy page to:

- [View the requirement hierarchy](#) (see page 28).
- [Create a requirement](#) (see page 12).
- [Open a requirement](#) (see page 16).
- [Add a requirement to the hierarchy](#) (see page 29).
- [Remove a requirement from the hierarchy](#) (see page 30).
- [Indent or outdent requirements in the hierarchy](#) (see page 31).
- [Move requirements in the hierarchy](#) (see page 29).
- Edit the tasks in the hierarchy.
See the *CA Clarity Basics User Guide* for more information.
- Configure columns in the hierarchy.
See the *CA Clarity Basics User Guide* for more information.

View the Requirement Hierarchy

View your requirement hierarchy from the requirement hierarchy page. Use the Plus and Minus icons to expand and collapse the list.

Note: You can also view your requirement hierarchy from the release plan.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Hierarchy.
The hierarchy page appears.

Add Requirements to the Hierarchy

Add a requirement to the requirement hierarchy.

Follow these steps:

1. Open the requirement.
The general page appears.
2. In Hierarchy, click Add.
The requirements page appears.
3. Select the check box next to the requirement, and click Add.
A child requirement is added to the hierarchy.

Move Requirements in the Hierarchy

You can move requirements from one location in the hierarchy to another location in the hierarchy. When you move a requirement after another requirement, it becomes a child to that requirement. When you move a requirement before another requirement, it becomes the parent to that requirement.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Hierarchy.
The hierarchy page appears.
3. Select the check box next to the requirement and click Move.
4. Do one of the following:
 - Select the requirement before which to move the requirement, and click Insert Before.
 - Select the requirement after which to move the requirement, and click Insert After.

The requirement is moved to its new location in the hierarchy.

Remove Requirements from the Hierarchy

Removing requirements from the requirement hierarchy reduces the aggregated totals for budget and estimated costs and efforts for any parent (ancestor) requirements in the hierarchy.

Consider the following when removing requirements from the hierarchy:

- If the requirement you are removing is a child requirement, the requirement and any lower-level requirements relative to the child are removed.
- The requirement itself is not deleted from CA Clarity PPM.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Hierarchy.
The hierarchy page appears.
3. Select the check box next to the requirement, and click Remove.

Indent and Outdent Requirements in the Hierarchy

You can create hierarchical relationships between requirements using the Requirement: Hierarchy page. You can indent a requirement to make it a child of the requirement above it, or you can use the Indent or Outdent buttons to designate individual requirements as parent or children.

Parent requirements are top-level requirements that have child requirements associated with them. Child requirements are nested beneath parent requirements. The requirement above it in the hierarchy can be a top-most requirement, or a second-, third-, or fourth-level requirement relative to the requirement above it. You can create an unlimited number of hierarchy levels.

Follow these steps:

1. Open the requirement.
The general page appears.
2. Click Hierarchy.
The hierarchy page appears.
3. Select the check box next to the requirement to indent or outdent, and do one of the following:
 - Select Indent.
The selected requirement has folded one level under the nearest higher-level requirement. A Plus icon appears in front of the higher-level requirement.
 - Select Outdent.
The selected requirement appears as out-dented relative to the requirement above it.

Requirement Dependencies

You can indicate dependencies existing between requirements using the requirement dependencies page. A dependency can occur when a requirement requires completing before another can begin.

View a List of Requirement Dependencies

You can view a list of requirements that are dependent on a requirement.

Follow these steps:

1. Open the requirement with the dependency relationship.
The general page appears.
2. Click Dependencies.
The list page appears.

Add Requirement Dependencies

You can create dependencies to other requirements, or a mutual dependency between requirements.

Example

Suppose you have a feature to build a new phone, requirement WOW Phone (RA), which has a dependency on two requirements: Hacker-free Security Requirement (R1), and Blue-tooth Requirement (R2). The feature requires Requirement R1, and R2 depends upon the feature.

Follow these steps:

1. Open the requirement to create a dependency relationship.
The general page appears.
2. Open Dependencies.
The list page appears.
3. Click Add.
The add page appears.
4. Select the check box next to the requirement to add as a dependency, and click Add.
5. Click one of the following:

Values:

- Mutual Dependency. Defines the selected requirement as mutually dependent on the target requirement.
- Needed By. Defines the selected requirement as depending upon the target requirement.
- Depends Upon. Defines the selected requirement for the target requirement.

The dependency relationship is created.

Remove Requirement Dependencies

Follow these steps:

1. Open the requirement to remove a dependency relationship.
The general page appears.
2. Click Dependencies.
The dependencies page appears.
3. Select the check box next to the dependency, and click Remove.
The dependency no longer displays in the list.

Delete Requirements

Delete requirements at any time, with the following exceptions:

- You cannot delete requirements assigned to a release.
- You cannot delete requirements having the "Approved" or "Rejected" status.

Deleting a requirement linked to a project task, does not delete the task but merely removes its association with the linked task.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open Home, and from Requirements Planning, click Requirements.
The list page appears.
2. Select the check box next to the requirement and click Delete.
The requirement is deleted.

Chapter 3: Releases

This section contains the following topics:

- [About Releases](#) (see page 35)
- [How to Work with Releases](#) (see page 36)
- [How to Work with Release Properties](#) (see page 38)
- [Define Release Effort Budget and Estimates](#) (see page 43)
- [Define Release Cost Budget and Estimates](#) (see page 44)
- [Scheduling Properties](#) (see page 44)
- [How to Work with Requirements Added to Releases](#) (see page 46)
- [Monitor Assigned Requirement Business Priorities](#) (see page 47)
- [Monitor Release Performance](#) (see page 48)
- [Delete Releases](#) (see page 48)

About Releases

Releases in CA Clarity PPM represent new future deliverables. A release includes:

- **Properties.** You can define the attributes that describe your release and represent new future deliverables.
- **Requirements.** The requirements you add to your release are grouped together within the release.
- **Priorities.** You can monitor assigned requirement business priorities for a release.
- **Processes.** You can create and run release-related processes. You can build your own processes for releases.

See the *CA Clarity Basics User Guide* for more information.

- **Audit Trail.** You can record changes to field-level attributes in an audit trail log.
See the *Personalizing CA Clarity User Guide* for more information.
- **Dashboard.** You can monitor your release performance using the Dashboard.

How to Work with Releases

You can use the releases list page to:

- [Create a release](#) (see page 36).
- [View a list of releases](#) (see page 38).
- [Open a release](#) (see page 38).
- [Approve a release](#) (see page 41).
- [Delete a release](#) (see page 48).

Do the following to work with releases:

1. Define the investments that are associated with the release.
See the *Portfolio Management User Guide* for more information.
2. [Create the release](#) (see page 36).
3. Define the projects or programs implementing the release.
See the *Project Management User Guide* for more information.
4. [Define the release effort budget and estimates](#) (see page 43).
5. [Define the release cost budget and estimates](#) (see page 44).
6. Once you create the release plan, [add the release to the release plan](#) (see page 55).
7. Once you add the requirements to the release plan, [approve the release](#) (see page 41).
8. [Link the release to a project or program](#) (see page 42).

Create Releases

Complete the basic information for a release using the create release page.

Follow these steps:

1. Open Home, and from Requirements Planning, click Release.
The list page appears.
2. Click New.
The create page appears.
3. Complete the following fields, and save:

Name

Defines the release name.

Required: Yes

ID

Defines the release unique identifier.

Required: Yes

Investment

Specifies the name of the investment owning the release.

Required: Yes

Highlights

Defines the release highlights.

Release Manager

Defines the name of the release manager.

Status

Specifies the release status.

Values: Approved and Unapproved

Default: Unapproved

Type

Specifies the release type.

Values: Compliance, Growth, New Product, Priority Enhancements, Research, and Service Release

Default: Undefined

Effort (Budget)

Defines the budgeted effort to deliver the release.

Operating Expense (Budget)

Defines the budgeted operating expenses from the total cost for a release.

Capital (Budget)

Defines the budgeted capital expenses from the total cost for a release.

4. In the Organizational Breakdown Structures section, define the OBS to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the release. The department requires to belong to the same entity as the location.

Location

Defines the location of the financial department associated with the release.
The location requires to belong to the same entity as the department.

The new release displays on the releases list.

View and Open Releases

View a list of releases on the releases list page and open a specific release.

Follow these steps:

1. Open Home, and from Requirements Planning, click Releases.
The list page appears.
2. Click the name of the release to open.
The general page appears.

How to Work with Release Properties

Use the release properties page to:

- [Edit the release general properties](#) (see page 39).
- [Associate the release to an investment](#) (see page 41).
- [Edit the release status](#) (see page 41).
- [Link the release to a project or program](#) (see page 42).
- [Unlink the release from a project or program](#) (see page 43).
- [Define the release effort budget and estimates](#) (see page 43).
- [Define the release cost budget and estimates](#) (see page 44).
- [Define the release scheduling properties](#) (see page 44).
- [Add attachments to the release](#) (see page 42).

Edit Release General Properties

Use the release properties page to define and edit the properties for a release.

Follow these steps:

1. Open the release.
The general page appears.
2. Edit the following fields, and save:

Name

Defines the release name.

Required: Yes

ID

Defines the release unique identifier.

Required: Yes

Investment

Specifies the name of the investment owning the release.

Required: Yes

Highlights

Defines the release highlights.

Release Manager

Defines the name of the release manager.

Status

Specifies the release status.

Values: Approved and Unapproved

Default: Unapproved

Type

Specifies the release type.

Values: Compliance, Growth, New Product, Priority Enhancements, Research, and Service Release

Default: Undefined

Associated Project/Program

Displays the name of the project or program linked to the release. The release can only be linked to one project or program.

Currency Code

Defines the currency to calculate the release budget and estimate values.

3. In the Effort section, define the budgeted and estimated effort for the release.

Effort (Budget)

Defines the budgeted effort to deliver the release.

Effort (Estimate)

Displays your organization estimated effort amount to deliver the release.

4. In the Cost section, define the budgeted and estimated capital and operating expenses for the release.

Operating Expense (Budget)

Defines the budgeted operating expenses from the total cost for a release.

Capital (Budget)

Defines the budgeted capital expenses from the total cost for a release.

Total Cost (Budget)

Displays the total budgeted cost for the release based on the following formula:

$$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$$

Operating Expense (Estimate)

Displays the estimated portion of the total cost attributed to operating expenses of the release.

Capital (Estimate)

Displays the estimated portion of the total cost attributed to capital expenses of the release.

Total Cost (Estimate)

Displays the total estimated cost of the release, based on the following formula:

$$\text{Total Cost (Estimate)} = \text{Operating Expense (Estimate)} + \text{Capital (Estimate)}$$

5. In the Organizational Breakdown Structures section, define the OBS you want to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the release. The department requires to belong to the same entity as the location.

Location

Defines the location of the financial department associated with the release. The location requires to belong to the same entity as the department.

Specify the Investment that Owns Releases

Indicate the product, application, asset, service, project, or program representing the work to deliver a release. Define the relationship when creating the release on the create release page. Modify the owner using the release properties page. Unlike the project or program that tracks the release implementation effort, the investment you define on the page is the owner of the release.

Follow these steps:

1. Open the release.
The general page appears.
2. In the General section of the page, select a value for the Investment.
The investment name is displayed next to the Investment field.
3. Save the changes.
The investment is the owner of the release.

Edit Release Status

Use the release status to manage the status of a release. The default status of a new release is "Unapproved". You can change the release status to "Approved" using the release properties page.

Note: You can also approve releases using the releases list page and from the release plan.

Follow these steps:

1. Open the release.
The general page appears.
2. Edit the following field, and save the changes:

Status

Specifies the release status.

Values: Approved and Unapproved

Default: Unapproved

Add Attachments to Releases

Store documents related to the release using the attachments page of release properties page.

Follow these steps:

1. Open the release.
The general page appears.
2. Open the Properties menu, and click Attachments.
The attachments page appears.
3. Define the following field, and save the changes:

Attachment

Defines the path of the document to attach to this release. Click the Browse icon to find and attach a document for others to view.

Link Releases to Projects or Programs

Link the release to a project or program to track the release implementation effort. When linked, the release is assigned to the project. You can view the name of the project linked to the release in the Associated Project/Program field on the general page. If the field is blank, the release is not linked to a project or program.

The linked project or program is a separate relationship from the investment that owns the release. You can link an unlimited number of releases to a project or program. However, you can only link a release to one project or program. You can establish this relationship from the release or from the project or program.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open the release.
The general page appears.
2. Click Link.
3. Click Existing, and click Next.
The list page appears.
4. Select the button next to the project, and click Next.
The release is linked to the project or program. The name of the project or program is displayed in the Associated Project/Program field on the general page.

Unlink Releases from Projects or Programs

Unlink a release from the project or program. You can view the project or program linked to your release in the Associated Project/Program field on the release properties page. If the field is blank, the release is not linked to a project or program.

See the *Project Management User Guide* for more information.

Follow these steps:

1. Open the release.

The general page appears.

2. Click Unlink.

The release is unlinked from the project or program. The name of the project or program no longer displays in the Associated Project/Program field on the release properties page.

Define Release Effort Budget and Estimates

Define the release effort properties using the Effort section on the release properties page. The section displays the budgeted effort data that you defined when you created the release using the create release page. You can only edit the budgeted effort fields.

The work effort default display unit is recorded in hours. The CA Clarity PPM administrator defines the work effort default display unit.

See the *Administration Guide* for more information.

Follow these steps:

1. Open the release.

The general page appears.

2. Define the following field in the Effort section of the page, and save the changes:

Effort (Budget)

Defines the budgeted effort to deliver the release.

Effort (Estimate)

Displays your organization estimated effort amount to deliver the release.

Define Release Cost Budget and Estimates

Define the release cost budget and view estimates using the Cost section on the release properties page.

Follow these steps:

1. Open the release.
The general page appears.
2. Define the following fields in the Cost section of the page, and save the changes:

Operating Expense (Budget)

Defines the budgeted operating expenses from the total cost for a release.

Capital (Budget)

Defines the budgeted capital expenses from the total cost for a release.

Total Cost (Budget)

Displays the total budgeted cost for the release based on the following formula:

$$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$$

Operating Expense (Estimate)

Displays the estimated portion of the total cost attributed to operating expenses of the release.

Capital (Estimate)

Displays the estimated portion of the total cost attributed to capital expenses of the release.

Total Cost (Estimate)

Displays the total estimated cost of the release, based on the following formula:

$$\text{Total Cost (Estimate)} = \text{Operating Expense (Estimate)} + \text{Capital (Estimate)}$$

Scheduling Properties

Use the fields on the schedule page of release properties page to view and define the release scheduling properties. Properties include the release start and finish dates, alpha and beta start dates, and the scheduled date of release to the market.

View Scheduling Properties

View the release scheduling properties on the schedule page. You can also view the properties in the release plan release planner page.

Follow these steps:

1. Open the release.
The general page appears.
2. Open the Properties menu, and click Main, then from Properties, Schedule.
The schedule page appears.

Define Scheduling Properties

Follow these steps:

1. Open the release.
The general page appears.
2. Open the Properties menu, and click Main, then from Properties, Schedule.
The schedule page appears.
3. Define the following fields, and save:

Start

Defines the scheduled start date of the release.

Finish

Defines the scheduled finish date of the release.

Alpha

Defines the alpha start date of the release.

Beta

Defines the beta start date of the release.

Release to Market

Defines the scheduled date of release to the market.

How to Work with Requirements Added to Releases

Use the release requirements page to:

- [Add a requirement to a release](#) (see page 46).
- [View a list of requirements associated to a release](#) (see page 46).
- [Open a requirement from a release](#) (see page 46).
- [Remove a requirement from a release](#) (see page 47).

Add Requirements to Releases

Having associated requirements to investments, you can group them into releases. Add a requirement to a single release using the release or from the release plan.

Follow these steps:

1. Open the release.
The general page appears.
2. Click Requirements.
The requirements page appears.
3. Click Add.
The list page appears.
4. Select the check box next to the requirement and click Add.
The requirement, so added, displays on the release requirements page.
5. Change the requirement status to "Assigned to a Release".

View and Open Requirements from Associated Releases

You can view a list of requirements associated with a release on the requirements page.

Follow these steps:

1. Open the release.
The general page appears.
2. On the requirements page, click the name of the requirement to open.
The general page appears.

Remove Requirements from Releases

Follow these steps:

1. Open the release.

The general page appears.

2. Click Requirements, and select the check box next to the name of the requirement to remove from the release.

3. Click Remove.

The requirement is removed from the list.

Monitor Assigned Requirement Business Priorities

You can monitor the requirement business priorities assigned to a release using the release priorities page. The page lists all the requirements you have assigned to the release. View the overall business priority, innovation and user experience, revenue impact, developer productivity, and cost of operations and supports for the requirement.

Follow these steps:

1. Open the release.

The general page appears.

2. Click Priorities.

The priorities page appears.

Monitor Release Performance

Monitor a release performance using the release dashboard page.

The following portlets displays on the page:

- Scorecard. A grid portlet that displays the requirements added to the release based on their scorecard. The requirements are linked to project tasks. The status is based on the associated tasks status.
- Requirements By Theme. A graph portlet displaying requirements by theme.
- Requirements By Priority. A graph portlet displaying requirements by priority.
- Business Priority. A grid portlet displaying requirements by business priority.
- Requirements By Risk. A graph portlet displaying requirements by risk.

You can customize the page. For example, you can add or remove portlets using Studio. Open the release layout portlet page and modify the dashboard tab content.

See the *Studio Developer's Guide* for more information.

You can configure the portlets on the page. For example, on grid portlets you can reorder the columns, and on graph portlets, change the graph type from pie to funnel. Use the Configure option on the Options menu.

Follow these steps:

1. Open the release.
The general page appears.
2. Click Dashboard.

Delete Releases

You can delete releases at any time from the releases list page. When you delete a release with added requirements, the requirements become unassigned to the release. The Unassigned check box gets selected on the requirement properties page.

Follow these steps:

1. Open Home, and from Requirements Planning, click Releases.
The list page appears.
2. Select the check box next to the release and click Delete.
The confirmation page appears.
3. Confirm the deletion.

Chapter 4: Release Plans

This section contains the following topics:

[How to Work with Release Plans](#) (see page 49)

[View and Edit Release Plan Details](#) (see page 51)

[How to Work with Release Plan Contents](#) (see page 52)

[Release Planner](#) (see page 53)

[View Release Plan Roadmap](#) (see page 58)

[Delete Release Plans](#) (see page 58)

How to Work with Release Plans

Use the release plans list page to:

- [Create a release plan](#) (see page 50).
- [View a list of release plans](#) (see page 51).
- [Open a release plan](#) (see page 51).

Do the following to work with release plans:

1. Create the investments forming part of your release plan.
See the *Portfolio Management User Guide* for more information.
2. [Create the release](#) (see page 36).
3. [Create the requirements](#) (see page 12).
4. [Create the release plan](#) (see page 50).
5. [Add to the release plan the investments that own the releases forming part of the release plan](#) (see page 52).
6. [Add the release to the release plan](#) (see page 55).
7. [Add the requirement to the release plan](#) (see page 56).

Create Release Plans

You can complete release plan basics using the create release plan page.

Follow these steps:

1. Open Home, and from Requirements Planning, click Release Planning.

The list page appears.

2. Click New.

The create page appears.

3. Complete the following fields, and save:

Name

Defines the release plan name.

Required: Yes

ID

Defines the release plan unique identifier.

Required: Yes

Release Plan Manager

Defines the name of the release plan manager.

Currency Code

Defines the currency to calculate the release plan budget and estimate values.

4. In the Organizational Breakdown Structures section, define the OBS to associate with the resource for security, organizational, or reporting purposes.

See the *CA Clarity Basics User Guide* for more information.

Department

Defines the financial department and entity associated with the release plan.
The department belongs to the same entity as the location.

Location

Defines the location of the financial department associated with the release plan. The location belongs to the same entity as the department.

The new release plan displays on the release plans list page.

View and Open Release Plans

The release planner consists of a series of portlets that allow you to plan your upcoming releases. The default view is the plan of record.

Follow these steps:

1. Open Home, and from Requirements Planning, click Release Planning.
The list page appears.
2. Click the name of the release plan.
The planner page appears.

View and Edit Release Plan Details

You can view release plan details on the release plan properties page. Use the page to edit the release plan name and ID.

Follow these steps:

1. Open the release plan.
The planner page appears.
2. Click Properties.
The properties page appears.
3. View or edit the following fields in the Release Plan section:

Name

Defines the release plan name.

Required: Yes

ID

Defines the release plan unique identifier.

Required: Yes

4. View the following fields in the Values section:

Start Date

Displays the release plan start date.

Operating Expense (Budget)

Displays the budgeted operating expense amount for the release plan.

Capital (Budget)

Displays the budgeted capital cost for the release plan.

Total Cost (Budget)

Displays the total budgeted cost for the release plan.

Finish Date

Displays the release plan finish date.

Operating Expense (Estimate)

Displays the estimated operating expense amount for the release plan.

Capital (Estimate)

Displays the estimated capital costs for the release plan.

Total Cost (Budget)

Displays the total budgeted cost for the release based on the following formula:

$$\text{Total Cost (Budget)} = \text{Operating Expense (Budget)} + \text{Capital (Budget)}$$

5. Save the changes.

How to Work with Release Plan Contents

For new investments, use the content list page of release plan to:

- [Add an investment to the release plan](#) (see page 52).
- [View a list of investments added to the release plan](#) (see page 53).
- [Remove an investment from the release plan](#) (see page 53).

Add Investments to Release Plans

Follow these steps:

1. Open the release plan, and click Contents.
The contents page appears.
2. Click Add.
The add page appears.
3. Select the investment to add to the release plan, and click Add.
The newly added investment displays in the contents list.

View and Open Investments Added to Release Plans

View a list of the investments owning the release and forming part of the release plan using the content list page of release plan.

Follow these steps:

1. Open Home, and from Requirements Planning, click Release Planning.
The list page appears.
2. Click the name of the release plan.
The planner page appears.
3. Click Properties.
The properties page appears.

Remove Investments from Release Plans

Follow these steps:

1. Open the release plan.
The planner page appears.
2. Click Properties.
The properties page appears.
3. Select the check box next to the investment, and click Remove.
The investment is removed from the release plan.

Release Planner

Use the release plan release planner page to:

- [Update the plan of record](#) (see page 54).
- [Add a release to the release plan](#) (see page 55).
- [Approve a release from the release plan](#) (see page 55).
- [Add a requirement to the release plan](#) (see page 56).
- [View the requirement hierarchy from the release plan](#) (see page 57).
- [View a requirement dependencies from the release plan](#) (see page 57).
- [Remove the requirement from the release plan](#) (see page 57).

Update the Release Planner

Plan releases using the Releases and Requirements portlets on the release plan release planner page.

See the *CA Clarity Basics User Guide* for more information.

Follow these steps:

1. Open the release plan.
The planner page appears.
2. Edit the following fields:

Operating Expense (Budget)

Defines the budgeted operating expenses from the total cost for a release.

Capital (Budget)

Defines the budgeted capital expenses from the total cost for a release.

Effort (Budget)

Defines the budgeted effort to deliver the release.

Start

Defines the scheduled start date of the release.

Finish

Defines the scheduled finish date of the release.

Alpha

Defines the alpha start date of the release.

Beta

Defines the beta start date of the release.

Release to Market

Defines the scheduled date of release to the market.

3. Edit the following fields:

Operating Expense (Budget)

Defines the requirement budgeted portion of the total cost for operating expenses.

Capital (Budget)

Defines the requirement budgeted portion of the total cost for capital expenses.

Effort (Budget)

Defines your organization budgeted effort amount to deliver the requirement.

Release

Specifies the name of the release assigned to the requirement. Select a release to assign to the requirement.

Add Releases to Release Plans

Add the existing releases to your release plan using the release plan release planner page. Investments-owned releases linked to the release plan can be added to the release plan.

When you add a requirement-linked release to a release plan, the associated requirement is automatically added to the release plan. The requirements so added displays in the list in the Requirements portlet on the release plan release planner page.

Follow these steps:

1. Open the release plan.
The planner page appears.
2. In the Releases portlet, click Add Release.
The list page appears.
3. Select the check box next to the release and click Add.
The release is added to the Releases portlet on the release plan release planner page.

Approve Releases from Release Plans

Releases display in the list in the Releases portlet on the release plan release planner page. Approved releases display with yellow check mark icon in the Approved column.

Note: You can also approve releases using the releases list page and the release properties page.

Follow these steps:

1. Open the release plan.
The planner page appears.
2. In the Releases portlet, select the check box next to the release and click Approve Release.
The release status changes to "Approved".

Remove Releases from Release Plans

The releases associated with a release plan are listed in the Releases portlet on the release plan release planner page. You can remove releases from the release plan. When you remove a requirements-linked release from the release plan, the requirements are also removed from the release plan.

Follow these steps:

1. Open the release plan.

The planner page appears.

2. In the Releases portlet, select the check box next to the release and click Remove Release.

The release is removed from the Releases portlet on the release plan release planner page.

Add Requirements to Release Plans

Add all new requirements to your release plan using the release plan release planner page. The requirements so added are displayed in the Requirements portlet on the page.

Note: If a release plan contains a release linked to a requirement, the associated requirement is automatically added to the release plan.

Follow these steps:

1. Open the release plan.

The planner page appears.

2. In the Requirements portlet, click Add Requirement.

The list page appears.

3. Select the check box next to the requirement and click Add.

The requirement is added to the release plan.

View Requirement Hierarchy from Release Plans

View your requirement hierarchy from the release plan using the Requirements portlet on the release plan release planner page. You can only view the requirement hierarchy on the page. Use the Plus and Minus icons to expand and collapse the list.

Follow this step:

1. Open the release plan.

The planner page appears. The requirements are displayed in the Requirements portlet.

View Requirement Dependencies from Release Plans

You can link directly to a requirement dependencies list from the release plan.

Follow these steps:

1. Open the release plan.

The planner page appears.

2. In the Requirements portlet, click the dependencies icon next to the requirement.

The requirement dependencies page appears.

Remove Requirements from Release Plans

The requirements, directly or through association, to the release plan, are listed in the Requirements portlet on the release plan release planner page. You can remove requirements from the release plan. Such removal from the release plan, does not remove the requirement from its associated release.

Follow these steps:

1. Open the release plan.

The planner page appears.

2. In the Requirements portlet, select the check box next to the requirement, and click Remove Requirement.

The requirement is removed from the Requirements portlet on the release plan release planner page.

View Release Plan Roadmap

Release plan roadmaps are graphical, time-scaled representations of upcoming releases for a product, service, or other investment. The roadmap represents your organization game plan to release the new product, service, or other investment.

Follow these steps:

1. Open the release plan.
The planner page appears.
2. Click Roadmap.
The roadmap page appears.

Delete Release Plans

Follow these steps:

1. Open Home, and from Requirements Planning, click Release Planning.
The list page appears.
2. Select the check box next to the release plan, and click Delete.

Appendix A: Access Rights

This section contains the following topics:

[Release Access Rights](#) (see page 59)

[Release Plan Access Rights](#) (see page 61)

[Requirement Access Rights](#) (see page 61)

Release Access Rights

The access rights listed in this section include release-specific access rights necessary to create, edit, view, and delete releases.

Release - Approve

Allows the user to approve specific instance of a release.

Type: Instance

Release - Approve All

Allows the user to approve all releases.

Type: Global

Release - Create

Allows the user to create a release. This right includes the right to navigate to the release pages.

Type: Global

Release - Edit

Allows the user to edit specific instance of a release.

Type: Instance

Release - Edit All

Allows the user to edit all releases.

Type: Global

Release - Edit Access Rights

Allows the user to edit the access rights for a specific release. Does not include the Releases - Navigate or Release - View access rights.

Type: Instance

Release - Edit Access Rights - All

Allows the user to edit the access rights for all Releases. Does not include the Releases - Navigate or Release - View access rights.

Type: Global

Release - View

Allows the user to view specific instance of a release.

Type: Instance

Release - View All

Allows the user to view all releases.

Type: Global

Release - View Access Rights

Allows the user to view the access rights for a specific release. Does not include the Releases - Navigate or Release - View access rights.

Type: Instance

Release - View Access Rights - All

Allows the user to view the access rights for all Releases. Does not include the Releases - Navigate or Release - View access rights.

Type: Global

Release - Manager (Auto)

Automatic right granted to the manager of a release.

Type: Instance

Releases - Navigate

Allows the user to access the release planning pages.

Type: Global

Release - XOG Access

Allows the user to import and export release instances using the XML Open Gateway interface.

Type: Global

Release Plan Access Rights

The access right listed in this section includes release plan-specific access rights necessary to create, edit, view, and delete release plans.

Release Plan - XOG Access

Allows the user to import and export Release Plan instances using the XML Open Gateway interface.

Type: Global

Requirement Access Rights

The access rights listed in this section include requirement-specific access rights necessary to create, edit, view, and delete requirements.

Requirement - Approve

Allows the user to approve specific instance of a requirement.

Type: Instance

Requirement - Approve All

Allows the user to approve all requirements.

Type: Global

Requirement - Create

Allows the user to create a requirement. The right includes the right to navigate to the requirement pages.

Type: Global

Requirement - Edit

Allows the user to edit specific instance of a requirement. Does not include the Requirements - Navigate access right.

Type: Instance

Requirement - Edit All

Allows the user to edit all requirements.

Type: Global

Requirement - Edit Access Rights

Allows the user to edit the access rights for a specific requirement. Does not include the Requirements - Navigate or Requirement - View access rights.

Type: Instance

Requirement - Edit Access Rights - All

Allows the user to edit the access rights for all requirements. Does not include the Requirements - Navigate or Requirement - View access rights.

Type: Global

Requirement - Manager (Auto)

Automatic right granted to the manager of a requirement.

Type: Instance

Requirement - Prioritize

Allows the user to edit the priorities subpage for a specific instance of a requirement. Does not include the Requirements - Navigate access right.

Type: Instance

Requirement - Prioritize All

Allows the user to prioritize all requirements. Includes the Requirement - Edit All access right.

Type: Global

Requirement - View

Allows the user to view specific instance of a requirement. Does not include the Requirements - Navigate access right.

Type: Instance

Requirement - View All

Allows the user to view of all requirements.

Type: Global

Requirement - View Access Rights

Allows the user to view the access rights for a specific requirement. Does not include the Requirements - Navigate or Requirement - View access rights.

Type: Instance

Requirement - View Access Rights - All

Allows the user to view the access rights for all requirements. Does not include the Requirements - Navigate or Requirement - View access rights.

Type: Global

Requirements - Navigate

Allows the user to access the requirements list page.

Type: Global

Requirement - XOG Access

Allows the user to import and export requirement instances using CA Clarity PPM XML Open Gateway.