

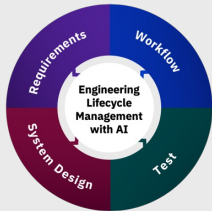
IBM Engineering

New & Noteworthy: IBM ELM V7.0.1 for SAFe®

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Summary: What's new in IBM ELM v7.0.1 for SAFe®



New templates for SAFe 5.0

Program Board Enhancements

SAFe® Templates

Configure Taskboard for PI Planning

Deprecated templates for SAFe 4.5

User Experience

Quick Planner Enhancements

Method Content

SAFe 5.0 Process Content

New SAFe 5.0 templates

This release adds two predefined process templates that support Scaled Agile Framework (SAFe) 5.0:

Essential SAFe 5.0

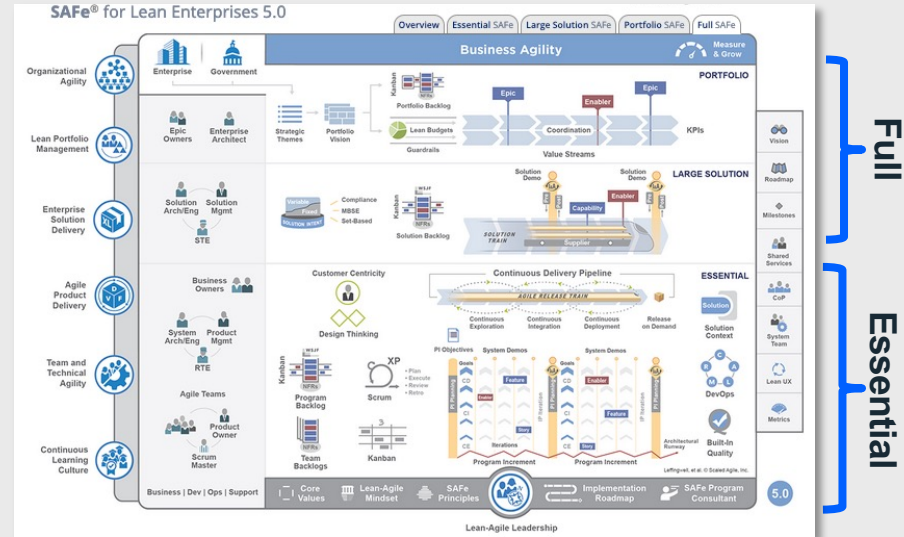
- Use template to establish a Program and Team tooling environment.

Full SAFe 5.0:

Use template to establish a tooling environment for:

- Full SAFe:** with the Portfolio and Large Solution layer.
- Large Solution SAFe:** Archive the Portfolio Epic work item types.
- Portfolio SAFe:** Archive the Solution Epic and Capability work item types.
- Any of these environment needs to be associated with one or more Essential SAFe tooling environments for the Program and Team.

SAFe Templates DOORS Next, EWM, ETM, LPA



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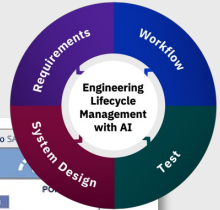
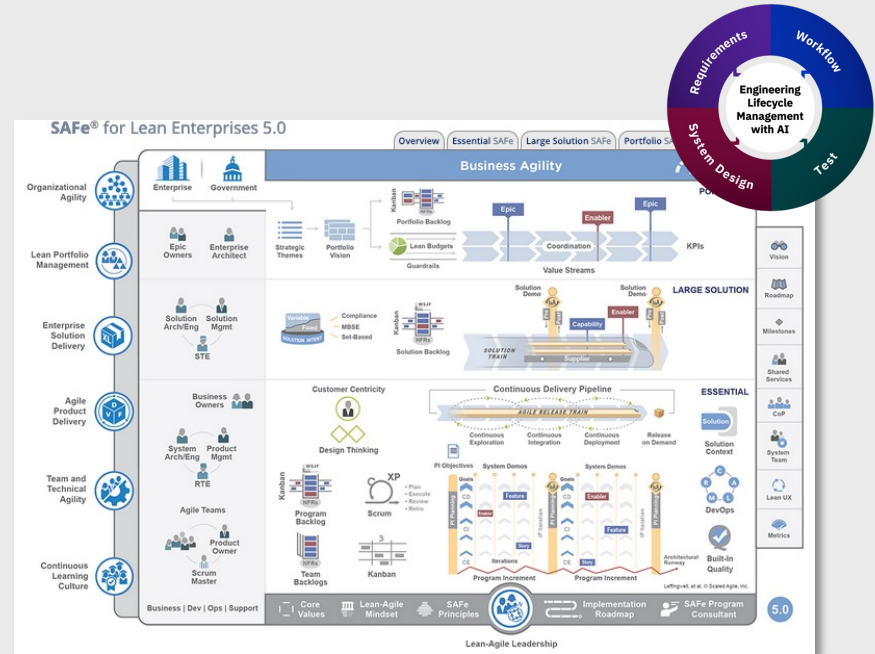
Support for SAFe 5.0 in ELM V7.0.1

DOORS Next

- New SWOT analysis artifact type
- New TOWS strategic options matrix artifact type
- Updated Strategic Theme artifact template
- Updated Role artifact template
- Updated Vision artifact type

Engineering Workflow Management

- Updated Portfolio Epic workflow
- Updated enum values for Scope enumeration



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New: Requirement Management Artifacts

New Artifacts help the Portfolio and Value Stream develop a plan for the future:

- **SWOT analysis** is used to identify the strengths, weaknesses, opportunities, and threats related to the current business situation.
- **TOWS strategic options matrix** is for identifying strategic options to create a better future state.

The SWOT and TOWS analysis is meant to be used together as they inform the Portfolio\Value Stream Canvas

The screenshot displays two templates from a software interface. The top template is for a SWOT analysis, titled "[Portfolio/Value Stream Name] SWOT Analysis". It includes a description: "< The SWOT analysis is used to identify the strengths, weaknesses, opportunities, and threats related to the current business situation. A SWOT analysis is a great way to uncover the current situation of your value stream, product, or a portfolio. The information from the SWOT analysis below is used to fill-in the strengths, weaknesses, opportunities, and threats of the TOWS strategic options matrix. >". Below the text is a 2x2 matrix with the following structure:

Internal Origin	STRENGTHS <ul style="list-style-type: none">• Strength 1• Strength 2• Strength 3• Strength 4• Strength 5	WEAKNESSES <ul style="list-style-type: none">• Weakness 1• Weakness 2• Weakness 3• Weakness 4• Weakness 5
External Origin	OPPORTUNITIES <ul style="list-style-type: none">• Opportunity 1• Opportunity 2• Opportunity 3• Opportunity 4• Opportunity 5	THREATS <ul style="list-style-type: none">• Threat 1• Threat 2• Threat 3• Threat 4• Threat 5

The bottom template is for a TOWS strategic options matrix, titled "[Portfolio/Value Stream Name] TOWS Strategic Options Matrix". It includes a description: "< The TOWS strategic options matrix is for identifying strategic weaknesses, opportunities, and threats of the TOWS strategic options matrix. >". Below the text is a 2x2 matrix with the following structure:

Internal Strengths (S) <ol style="list-style-type: none">1.2.3.4.	SO <p>How can your strengths be used to maximize opportunities?</p>	ST <p>How can you apply your strengths to overcome present and potential threats?</p>
Internal Weakness (W) <ol style="list-style-type: none">1.2.3.4.	WO <p>How can your opportunities be leveraged to overcome weaknesses?</p>	WT <p>How can you minimize weaknesses and avoid threats?</p>

Updates: Artifact Templates

- **Objective and Key Results** template has been added to the **Strategic Theme** artifact template. OKR can be used to define, organize, and communicate critical information about a strategic theme.
- **Persona** template has been added to the **Role** artifact template. Personas are integral to Design Thinking and help to create reliable and realistic representations of the user role. They help drive product development and several SAFe practices.

The top screenshot shows a 'Role Template' with the following structure:

- Navigation: < / ... / Artifact Templates / | 33 Role Template
- Link: Click to view Type Description
- Title: **[Name of the Role]**
- Text: <Description of user role>
- Section: **Sample Persona**
- Text: <The purpose of personas is to create reliable and realistic representations of the user role>
- Table with 2 columns: <Picture> and <Person Name>
- Table with 2 columns: Job Title and Key Scenarios
- Section: **Description:**
- List: 1, 2, 3, 4, 5
- Section: **Responsibilities:**
- List: 1, 2, 3, 4, 5
- Section: **Pain Points:**
- List: 1, 2, 3, 4, 5

The bottom screenshot shows a '[SAFe] Strategic Theme Template' with the following structure:

- Navigation: < / ... / Artifact Templates / | 35 [SAFe] Strategic Theme Template
- Link: Click to view Type Description
- Title: **[Strategic Theme Title]**
- Section: **Summary**
- Text: < Short summary >
- Section: **Objectives and Key Results (OKR)**
- Text: < OKR is used to define, organize, and communicate critical information about a strategic theme. It provides a simple approach to create alignment and engagement around measurable and ambitious goals. Objectives are a memorable description of what you want to achieve. They should be short, inspirational, and challenging. Key results are a set of metrics that measure your progress towards the strategic theme. For each objective, there sh key results. >
- Text: Example:
- Table with 2 columns: **Objective** and **Key Results**

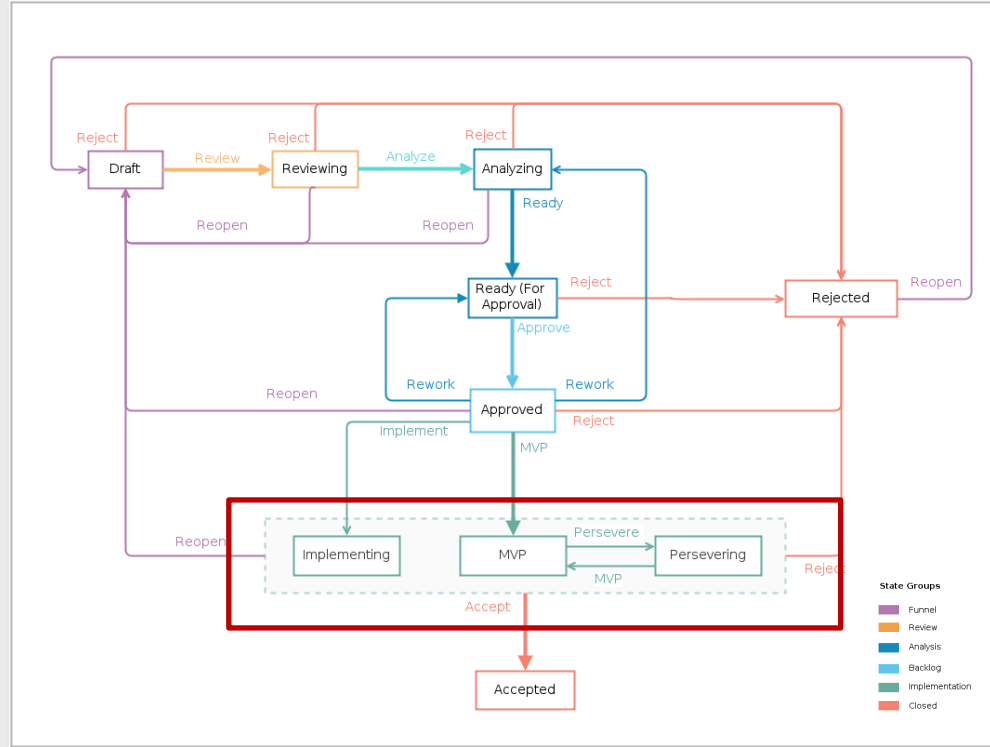
Objective	Key Results
Increase customer engagement in our community platform	Reduce membership churn from 20% to 5%
	Increase Net Promoter Score from 35 to 60
	Improve average weekly visits per active user from 5,000 to 20,000
	Increase non-paid (organic) traffic from 1,500 to 5,000
	Improve engagement from 30% to 60%

Updates: Portfolio Epic Workflow

Additional states added in the 'Implementation' state group:

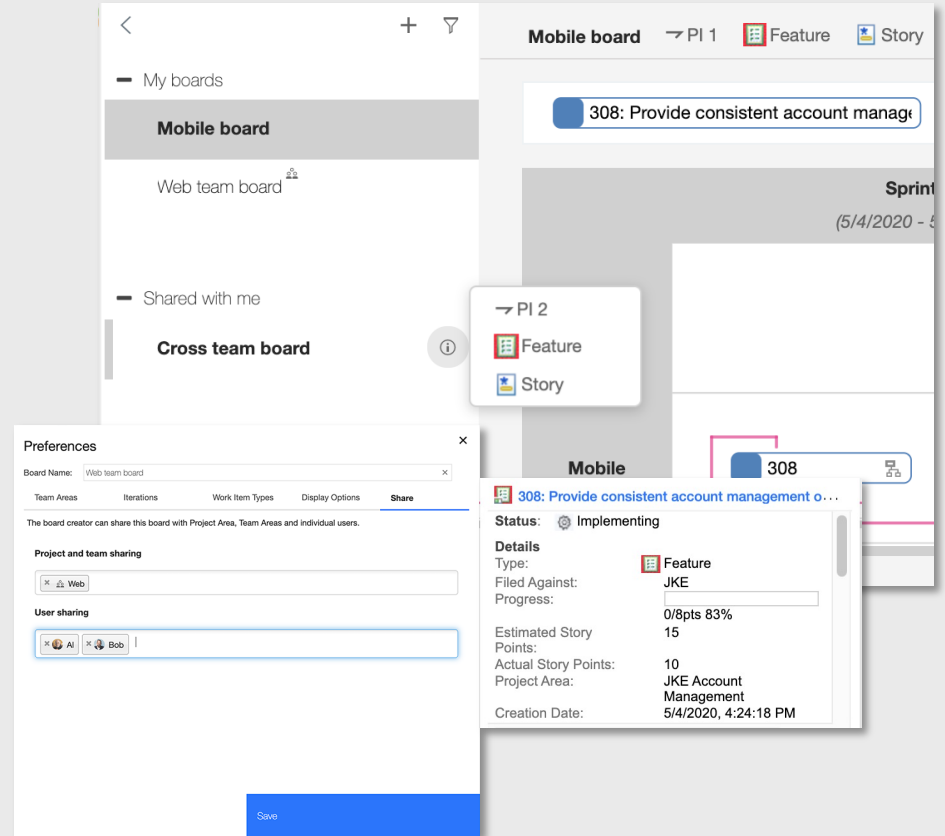
- **MVP** - The approved Portfolio Epic is allocated to the Agile Release Train as an activity needed to develop the MVP and evaluate the business outcome hypothesis.
- **Persevering** - The approved Portfolio Epic is allocated to the Agile Release Train to reserve capacity for the epic.

Option to simplify the Portfolio Kanban using a single 'Implementing' state has been kept.



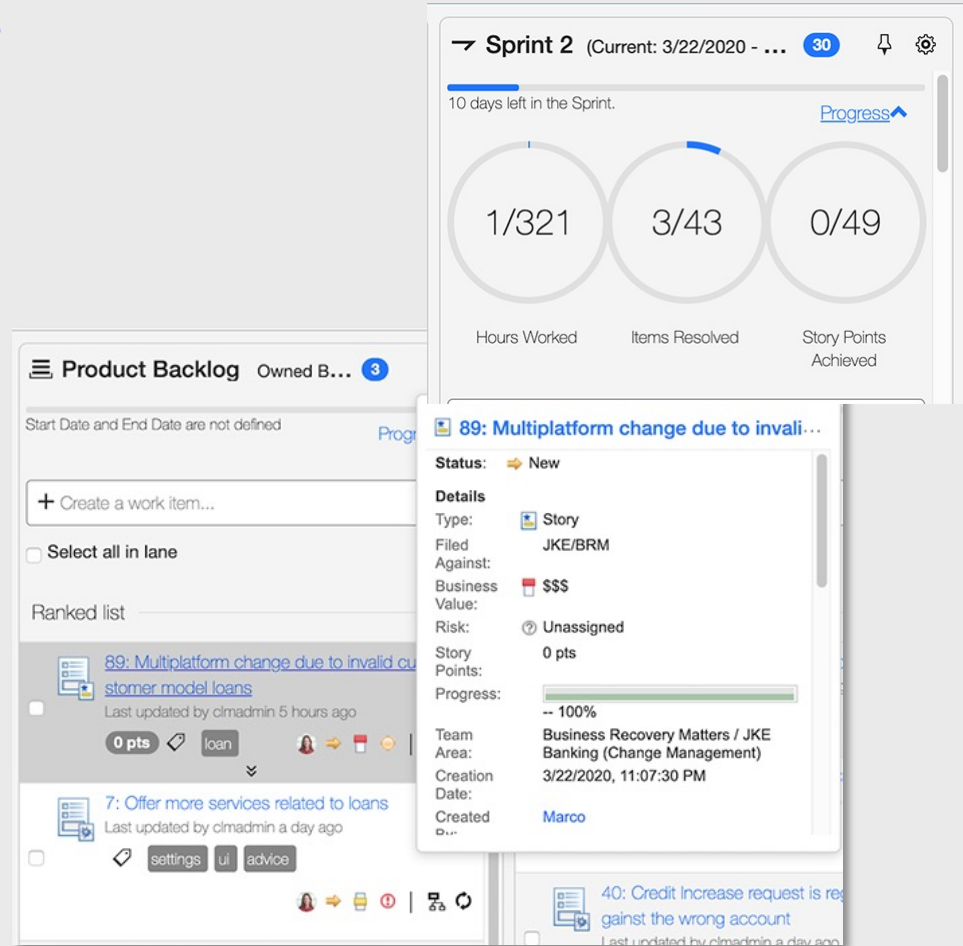
Program Board Enhancements

- **Support for Program Board Naming and Sharing**
 - Create and save one or more named Program Boards in a single project.
 - Hover over the board name information icon, details of the iteration, parent, and child work-item type that is configured for that board are displayed.
 - Modify and Delete boards based on project permissions for the plan.
 - Filter boards in the left navigation pane
- **Share boards** with project members, team members, or individual users.
- Support for **rich hover** over a resource link on the Program Board shows a preview of the work item.



Quick Planner Enhancements

- The **Progress** now honours the board filters and also the lane filters applied on the board while showing remaining time, hours worked, items resolved, and story points achieved in a sprint.
- Support for **rich hover** over a resource link on the Quick Planner Board shows a preview of the work item.



Taskboard Enhancement

To see Feature-Story as a Taskboard during PI Planning:

- Configure the selection of Plan Items to be displayed in the Taskboard plan view as opposed to the project area configuration.
- By default, the selection of the Plan Item in the plan view is inherited from the project area configuration.

The screenshot displays the configuration interface for a Taskboard. At the top, the 'Name' field is set to 'Taskboard' and the 'Display' dropdown is also set to 'Taskboard'. Below this, there are three tabs: 'Options', 'Column Display', and 'Card Display'. The 'Column Display' tab is active, and a red box highlights the configuration area. In this area, the 'Columns (State Groups)' dropdown is set to 'Plan Items'. Under 'Subcolumns (States)', the 'Feature' state is selected. Other options include 'Defect', 'Milestone', 'PI Objective', 'Program Epic', 'Retrospective', 'Risk', 'Story', and 'Task'. To the right of the configuration area, there are four columns representing different states: 'New', 'Funnel', 'In Progress', and 'Review'. Each column has a list of sub-states with checkboxes and icons. Below the configuration area, the Taskboard view is shown with three columns: 'Plan Items', 'New', and 'In Progress'. The 'Plan Items' column contains three cards, each with a title, an 'Unassigned' person icon, and a 'Blocked' checkbox. The 'New' column contains one card with a similar structure. The 'In Progress' column is currently empty.

Reporting: Agile @ Scale Reports for ELM 7.0

Agile @ Scale reports for ELM 7.0 have been verified to be used with SAFe 5.0 templates in ELM 7.0.1.

As a refresher, in ELM 7.0, Agile @ Scale report archives were delivered with the following updates:

- 1 Use of Custom Expressions (where possible) has replaced Advanced SQL which enables data and formatting via Report Builder for those reports
- 2 Some reports have been consolidated for simplicity
- 3 Report archives and supporting documents have been updated

Note: For additional details on Agile @ Scale reports, refer to jazz.net.

Additional updates

Lifecycle Project Template

- The Quality Professional, Analyst, Developer lifecycle project template now uses Full SAFe 5.0 Process templates by default.

Deprecated in ELM v7.0.1

- All SAFe 4.5 out of box templates are removed in v7.0.1

The screenshot displays the configuration page for a project template in ELM. The 'Artifact Containers' section is highlighted with a red box. It contains a table with the following data:

Method	Artifact Containers	Process / Project Template
Create:	Project Name (Requirements) project area in '/rm' for Requirements Management Provides Requirements to Project Name (Quality Management)	SAFe 5.0 Full Component Templates
Create:	Project Name (Change Management) project area in '/ccm' for Change and Configuration Management Provides Implementation Requests to Project Name (Requirements) Provides Defects to Project Name (Quality Management) Provides Quality Management Tasks to Project Name (Quality Management) Provides Requirements Change Requests to Project Name (Requirements)	SAFe 5.0 Process (Full SAFe)
Create:	Project Name (Quality Management) project area in '/qm' for Quality Management	Quality Management for Full SAFe 5.0

Thank you

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