CONFIGURING SAFE® V4.0 IN THE IBM COLLABORATIVE LIFECYCLE MANAGEMENT

Abstract

In this document, we provide step-by-step guidance to configure support for the SAFe V4.0 methodology in CLM tooling.

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CONFIGURING IBM COLLABORATIVE LIFECYCLE MANAGEMENT (CLM) FOR SAFE® 4.0

DELTA UPDATES

The purpose of this section is to summarize the set of fixes and enhancements made to the SAFe 4.0 process templates since the initial release on 3-18-2016.

Last Update	Product	Template	Summary
08-17-2016	RTC	Portfolio, Program	Added specifications for which work item types should be marked as “plan items”
08-05-2016	RTC	Portfolio, Program	Support for "Definition of Done": • Add Checklist tab on Capability, Feature and Story • Includes new enumeration: Checklist Item Status • Includes new attributes: Acceptance Test, Performance Test, Documentation, UX Design, Checklist Notes • Includes updated editors • Add Pre-Defined Queries
			Merge Backlog and Roadmap Timelines for Value Stream, Program to enable a consolidated plan view representing the “Roadmap”
			Update OOTB plans based on timeline update, merge Backlog with Roadmap plans at Portfolio level
			Support for calculating and rolling up story points: • Actual Story Points (numeric) attribute on Epics, Capability and Feature • Story Points (numeric) attribute on Story – hidden, calculated from Story Points complexity attribute
			New work item templates
			Add Proposed attribute (Iteration)
			Change WSJF to “decimal” type to allow for more precision in the calculation.

		Portfolio	Add Risk, Defect, and Retrospective work item types to Portfolio
		Program	Add "How Found" attribute with pre-populated enum list to Defect work item type
			Fixed bug in Feature Workflow: Analyzing -> Ready for Approval
	RDNG	Portfolio	Change Allocated Investment and Bugeted Capacity attributes to be Float data type
			Create **Program** artifact in RDNG to capture budget/capacity for at a Program level. Create **Program Template**.
			Create new/updated views for use on RDNG dashboard for Programs and Value Streams
			Create stub Programs in Value Streams
03-18-2016	CLM (All)	Portfolio Program	Initial beta release of templates

INTRODUCTION

Complete end-to-end support for SAFe 3.0 was delivered in version 6.0.1 of the IBM Collaborative Lifecycle Management (CLM) solution , just prior to the announcement of Scaled Agile Framework® 4.0. Additional enhancements have been added to the SAFe V3.0 templates in CLM 6.0.2. This document describes how to configure CLM 6.0.1 (and later releases) to support SAFe 4.0, starting with the out-of-the-box SAFe 3.0 templates available in CLM 6.0.2.

SAFe 4.0 introduces an option to more robustly govern the delivery of Value Streams via a 4-level SAFe framework. Three-level SAFe is still available as well for smaller, less complex businesses. There are also additional artifacts at the Value Stream level (with 3- or 4-level SAFe) related to elaborating the Solution Intent and Solution Context. The changes to configure a SAFe 4.0 environment focus primarily on the capabilities that support the Value Stream layer, although there are other changes that impact Portfolio, Program and Team as well.

Below you will find sections for configuring each of the SAFe V3.0 templates provided in Rational Team Concert (RTC), Rational DOORS Next Generation (RDNG) and Rational Quality Manager (RQM). You may want to configure all three environments or focus just on RTC. Note that some of the RTC and RQM template configurations must be made in the Eclipse client once you have extracted the updated process template.

Note: *You should download CLM 6.0.2 M3 (Milestone 3) or later. You do not need to be running 6.0.2 in a production environment. This version is simply required so that you can get the 6.0.2 versions of the SAFe 3.0 templates, so a trial version is fine.*

ASSUMPTIONS

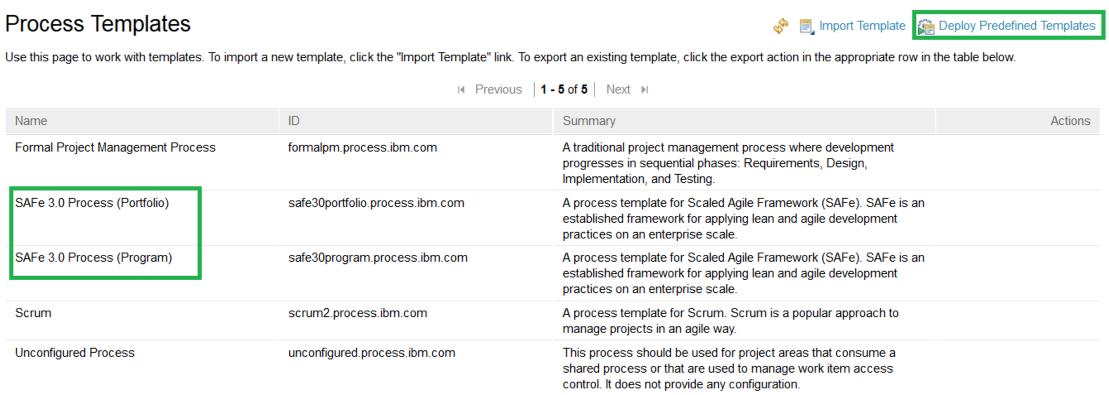
The steps in this document assume that:

- You have a CLM 6.0.2 M3 (or later) environment installed with SAFe templates deployed.
- You have Administrative authority and experience configuring process/project templates.

RATIONAL TEAM CONCERT SAFE V4.0 CONFIGURATION

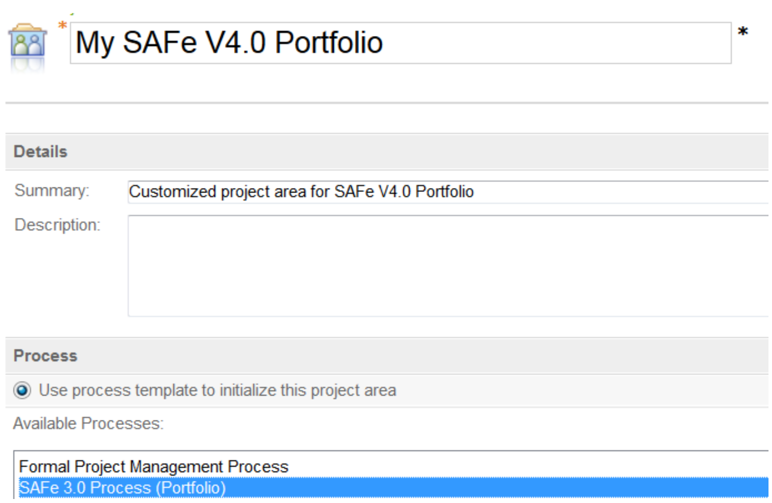
Before configuring the SAFe V4.0 project areas, you need to create them based on the SAFe V3.0 templates. You will create two RTC project areas: **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program**.

1. Launch RTC's Administration Page in your browser and log on as an Administrator.
2. Navigate to the Templates page by selecting the **Template** option from the menu bar.
3. Ensure you have the SAFe predefined templates deployed:



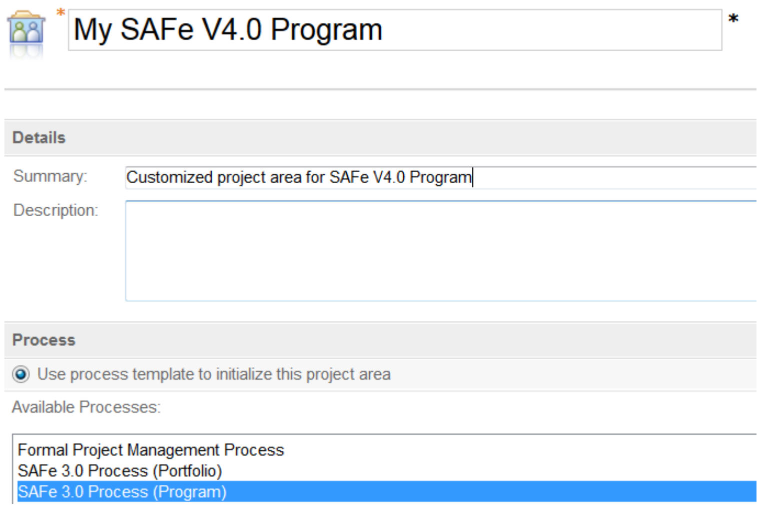
Name	ID	Summary	Actions
Formal Project Management Process	formalpm.process.ibm.com	A traditional project management process where development progresses in sequential phases: Requirements, Design, Implementation, and Testing.	
SAFe 3.0 Process (Portfolio)	safe30portfolio.process.ibm.com	A process template for Scaled Agile Framework (SAFe). SAFe is an established framework for applying lean and agile development practices on an enterprise scale.	
SAFe 3.0 Process (Program)	safe30program.process.ibm.com	A process template for Scaled Agile Framework (SAFe). SAFe is an established framework for applying lean and agile development practices on an enterprise scale.	
Scrum	scrum2.process.ibm.com	A process template for Scrum. Scrum is a popular approach to manage projects in an agile way.	
Unconfigured Process	unconfigured.process.ibm.com	This process should be used for project areas that consume a shared process or that are used to manage work item access control. It does not provide any configuration.	

   If you do not see these, click the **Deploy Predefined Templates** link.
4. Select *Project Areas > Create > Project Area* from the menu bar and create a new SAFe V4.0 Portfolio project area using the **SAFe 3.0 Process (Portfolio)** template:



5. Add yourself (the Administrator user) as a member of the project with the **Portfolio Manager** role.
6. Save your changes.

7. In another browser tab, launch RTC's Administration Page, log on as an Administrator and Select *Project Areas > Create > Project Area*.
8. Create a second project area for the SAFe V4.0 Program based on the **SAFe 3.0 Process (Program)** template:



9. Add yourself (the Administrator user) as a member of the project with the **Product Manager** role.
10. Save your changes. Leave both project areas opened in your browser.

Update the project area characteristics as described in the sections below for each of the project areas.

SAFE V4.0 PORTFOLIO CONFIGURATIONS (BROWSER)

TEAM AREA HIERARCHY

If you plan to use the **My SAFe V4.0 Portfolio** project area as a "master" for other SAFe V4.0 Portfolio project areas, as opposed to extracting the process template for use in establishing new project areas, you can update the Team Area Hierarchy here. However, if you plan to extract a process template for use by other projects in your organization, the Team Area Hierarchy and related Work Item Categories must be configured in the Eclipse client in SAFe V4.0 Process Template Configurations (Eclipse) later in this document.

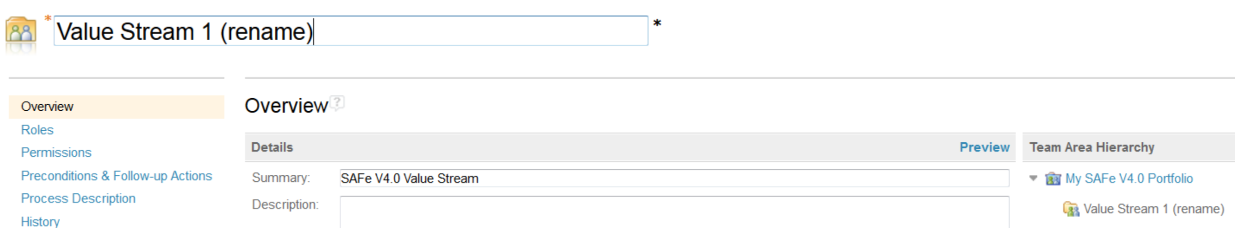
How do I choose?

*If you want to use your configured **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas as "masters" to create new child project areas that inherit the master process configuration, you do not need to extract process templates. This is beneficial because, as enhancements are released in these templates by IBM, you can apply the updated configurations in the master and have the enhancements automatically inherited by all child project areas. If, however, you want to create new SAFe V4.0 project areas that are independent from any master, you will need to ultimately extract process templates that are used across your organization and then provide configuration enhancements for all of the project areas that use your templates. The decision is yours; if you want to extract the process templates, some of the configurations must be performed using the Eclipse client, as specified.*

Update the *Portfolio* Team Area Hierarchy to include your Value Streams.

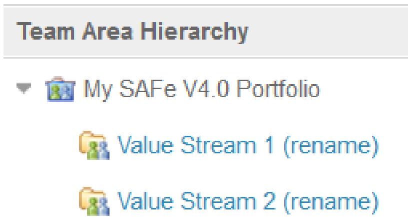
1. Launch the Application Administration page for the **My SAFe V4.0 Portfolio** project area.
2. In the *Team Area Hierarchy* on the right, click the **Create Team…** icon to create a new Team Area:

3. Specify `Value Stream 1 (rename)` for the name:



4. Save your changes.
5. Select **My SAFe V4.0 Portfolio** in the *Team Area Hierarchy* again and repeat this process to create `Value Stream 2 (rename).`
6. Save your changes.

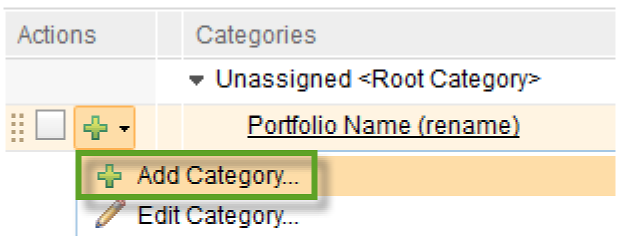
Your Team Area Hierarchy should look like this:



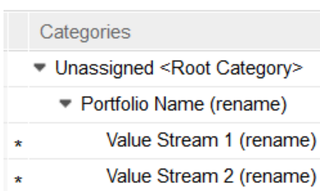
Work Item Categories

If you have created the Team Areas above, create Work Item Categories that correspond to them.

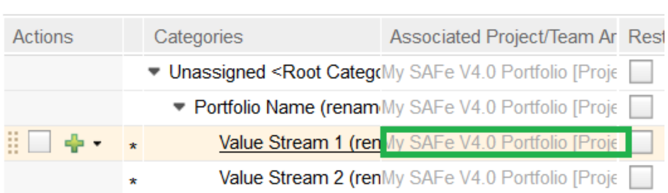
1. Select the **Categories** option in the left navigation bar.
2. Use the *Action > Add Category…* menu to create new Categories `Value Stream 1 (rename)` and `Value Stream 2 (rename)`:



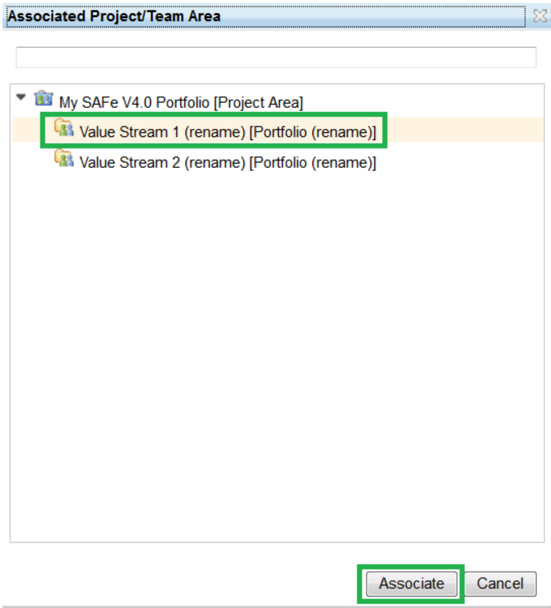
Your work item categories should look like this:



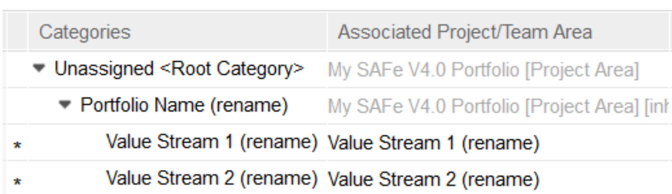
3. Associate your new Value Stream team areas with these categories by clicking in the **Associate Project/Team Area** space next to the category:



4. Select the appropriate Team Area and then **Associate**:



Your work item categories should now look like this:



	Categories	Associated Project/Team Area
	Unassigned <Root Category>	My SAFe V4.0 Portfolio [Project Area]
	Portfolio Name (rename)	My SAFe V4.0 Portfolio [Project Area] [inh
*	Value Stream 1 (rename)	Value Stream 1 (rename)
*	Value Stream 2 (rename)	Value Stream 2 (rename)

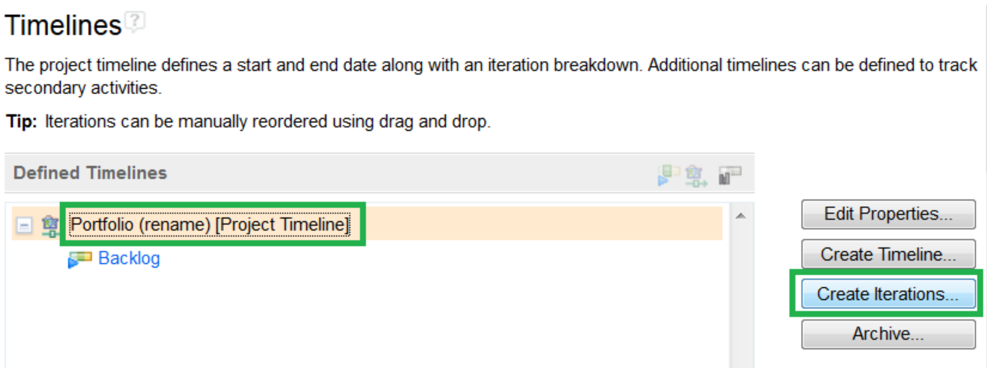
5. Save your changes.

Timelines

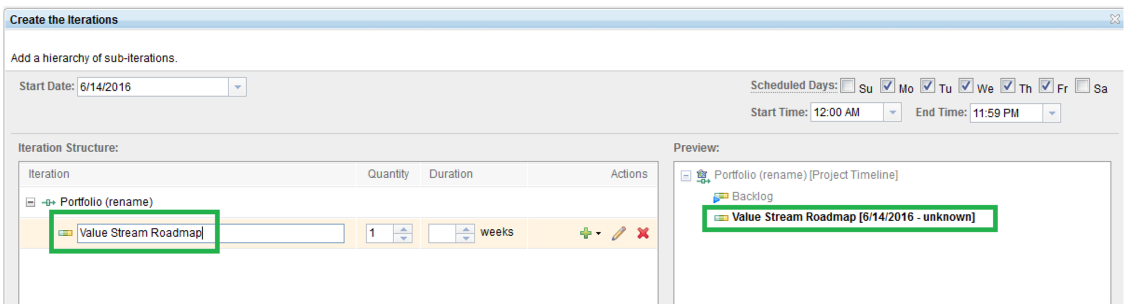
In this section, you create a Value Stream iteration to be used by all Value Streams in your Portfolio. If you are not intending to implement 4-level SAFe, you can skip this section.

A single Value Stream iteration assumes that all Value Streams have the same cadence across the Portfolio. Even if your Portfolio has more than one Value Stream, this is a simple way to manage all releases. However, you can create separate iterations for use by your individual Value Streams if you have Value Streams that deliver on different cadences. In any case, in 4-level SAFe, the Programs that realize Value Streams are on the cadence set by the Value Stream so you will need to synchronize the Value Stream iteration(s) with their associated Program iterations.

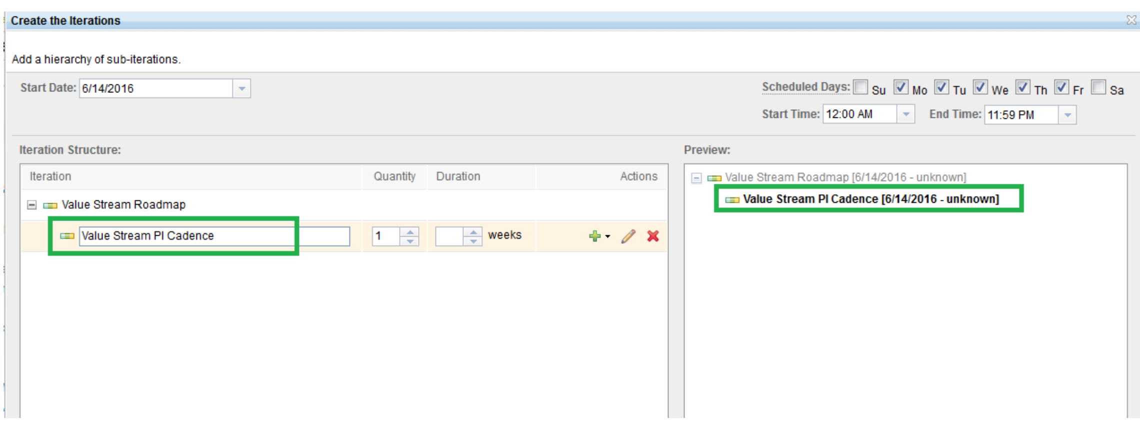
1. Select the **Timelines** option in the left navigation bar.
2. Select the **Portfolio Timeline** and then click the **Create Iterations…** button:



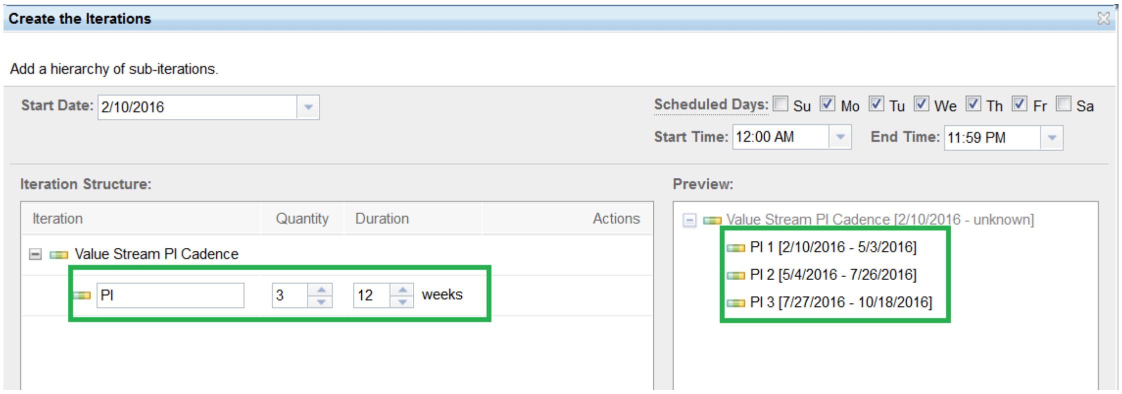
3. In the **Create the Iterations** dialog, specify `Value Stream Roadmap` and click OK:



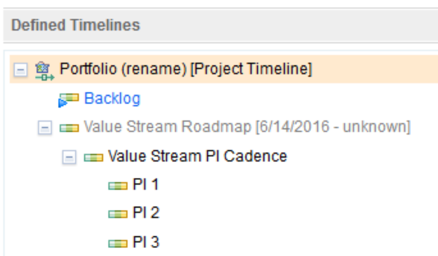
4. With the new *Value Stream Roadmap* iteration selection, click the **Create Iterations…** button. In the **Create the Iterations** dialog, specify the name of your Iteration, `Value Stream PI Cadence`, and click OK:



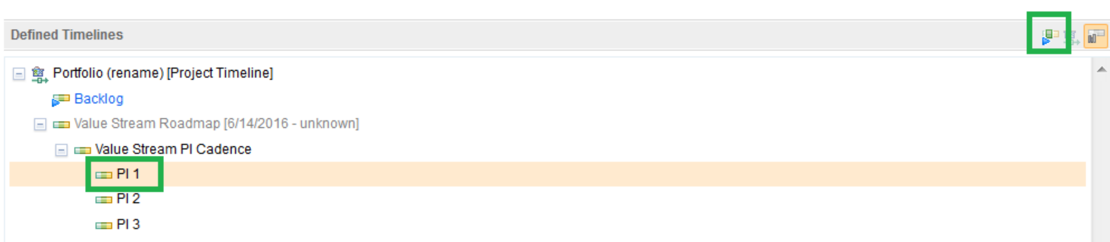
5. With the new *Value Stream PI Cadence* iteration selected, click **Create Iterations…** and specify the initial set of Program Increments, then click OK:



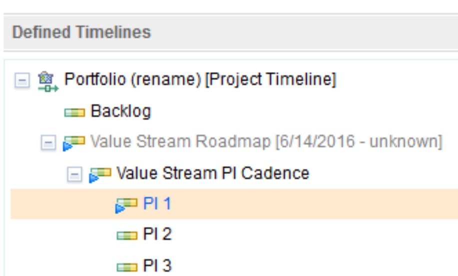
Your updated timeline should look similar to this:



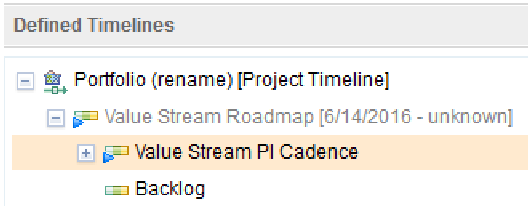
6. Set *PI 1* as the current PI using the *Set the Selected Iteration as Current* icon:



Your updated timeline should look similar to this:



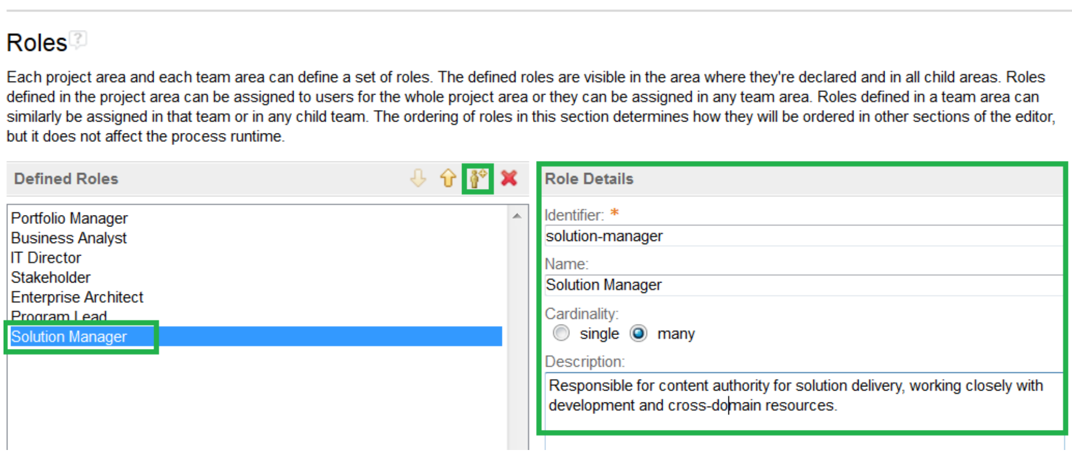
7. Collapse the *Value Stream PI Cadence* branch of the timeline and then select and drag the *Backlog* iteration to the *Value Stream Roadmap* iteration so that it appears after *Value Stream PI Cadence*. Your final timeline should look similar to this:



8. Save your changes.

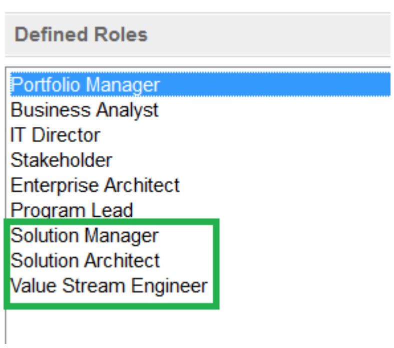
ROLES

1. Select **Roles** in the left navigation bar.
2. Add the new SAFe Value Stream roles by selecting the *Create Role* icon. Create the `Solution Architect, Solution Manager, Value Stream Engineer` roles, for example:



Add

Your **Defined Roles** should look like this:



PERMISSIONS

1. Set the permissions for your new roles. You can use the *Portfolio Manager* and *Business Analyst* roles as models, where:

   Portfolio Manager <> Solution Manager, Value Stream Engineer
   Business Analyst <> Solution Architect

2. Save your changes.

Work Items

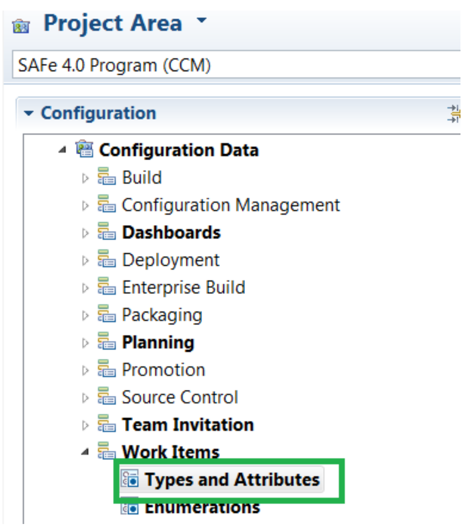
In this section, you add new work item types and make changes to existing work item types.

HOW DO I GET THE ICONS?

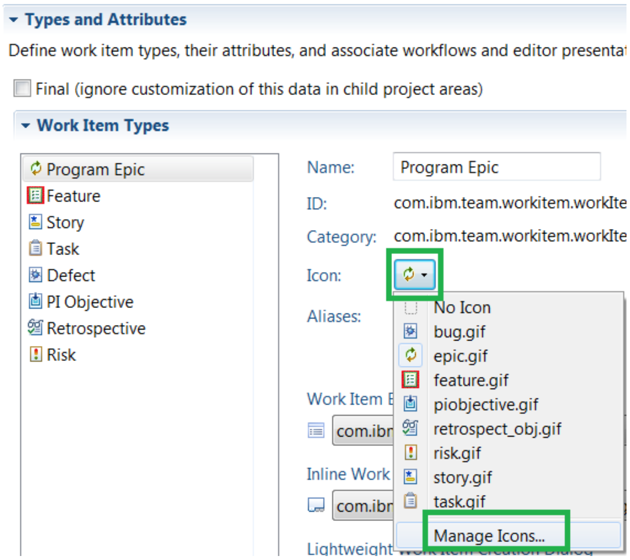
You may not have all the work item icons referenced in the sections below, but you may find some of them in the **My SAFe V4.0 Program** project area. Alternatively, you can get a set of icons from the *SAFe 4.0 Icons (2016-07-20).zip* archive file posted on the SAFe 4.0 Assets page.

To use them in the **My SAFe V4.0 Portfolio** project area configuration, you will need to download the archive to your local machine and unzip them into a directory.

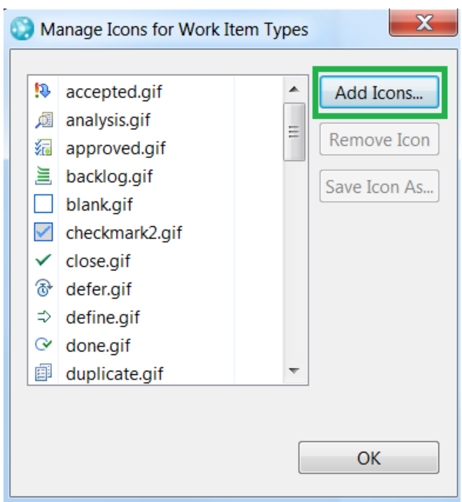
1. Launch RTC in the Eclipse client and establish a Repository Connection.
2. Right-click on the Repository Connection, choose **Managed Connected Project Areas** and select the **My SAFe V4.0 Portfolio** project area.
3. Right-click to open the **My SAFe V4.0 Portfolio** project area.
4. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Work Items > Types and Attributes* in the **Configuration** box on the left:



5. In the **Work Item Types** pane, select the *Icon* drop-down and then **Manage Icons…**



6. Click the **Add Icons…** button and navigate to the local directory where you have stored your icons. Select each one you'd like to add (use Ctrl key to select multiple icons) and click **Open** to add them to your environment.



Click the OK button when you're finished. It is easiest to just select all of them and then click **Cancel** when you get a message about a duplicate. This will enable you to add the new ones, but keep those that already exist in your environment.

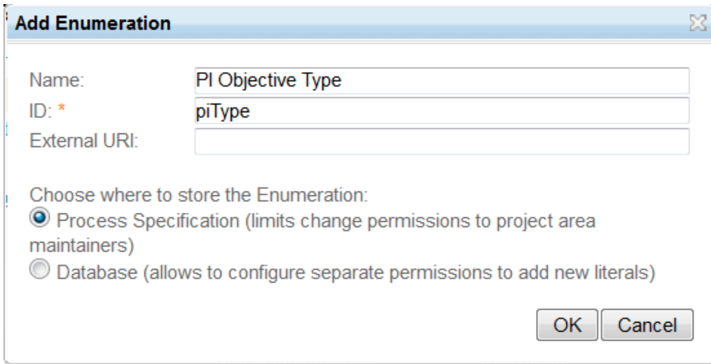
7. Repeat this process to add **Enumeration**, **State** and **Action** icons by going to the *Project Configuration* > *Configuration Data* > *Work Items* > *Enumerations* and *Project Configuration* > *Configuration Data* > *Work Items* > *Workflows* sections. Note: In the *Enumerations* section you will need to edit an existing Literal in order to add Enumeration Literal icons.

You should now have all of the work item type, state and action icons used below. Repeat this process in the **My SAFe V4.0 Program** project area if you are missing icons there as well.

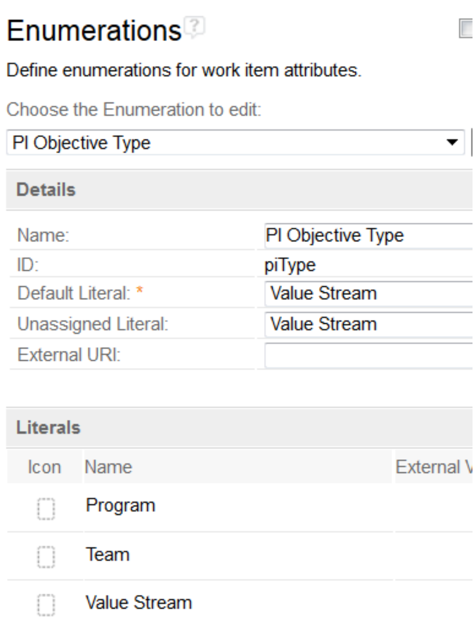
WORK ITEM ENUMERATIONS

You must first create some new enumerations and update existing ones before configuring the work item types and attributes.

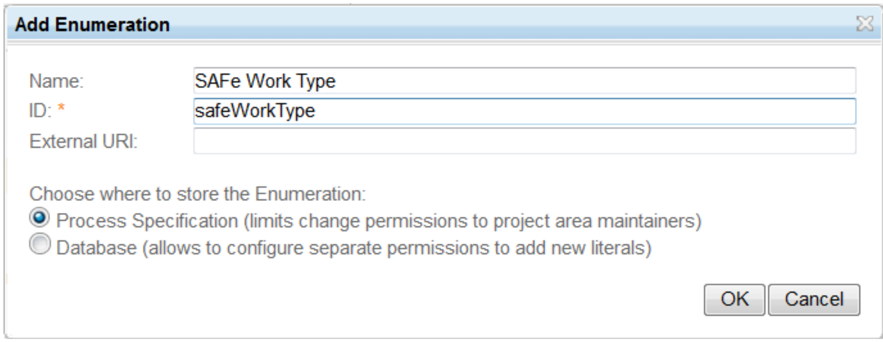
1. In the **My SAFe V4.0 Portfolio** project area, select **Work Items** in the left navigation bar.
2. Select **Enumerations**.
3. Click the Add... button to create a new PI Objective Type enumeration.
4. Specify the **Name** and **ID**: `PI Objective Type, piType`



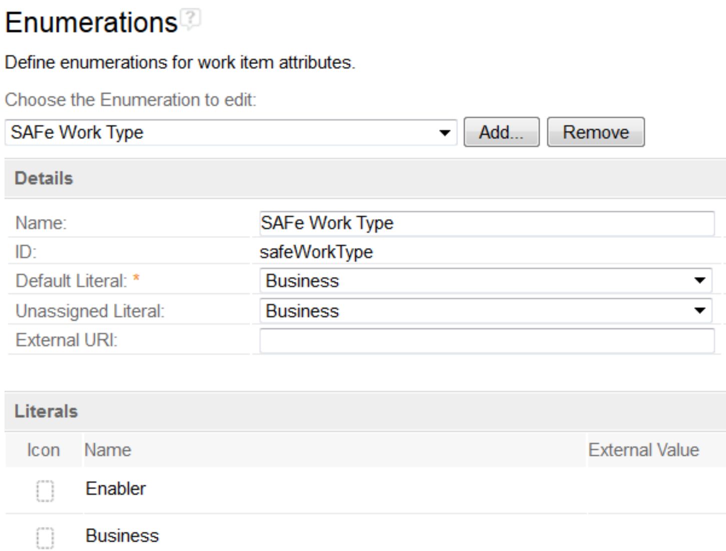
5. Select Add... to add literals: `Program, Team, Value Stream`. Set `Value Stream` for the **Default** and **Unassigned Literal** values:



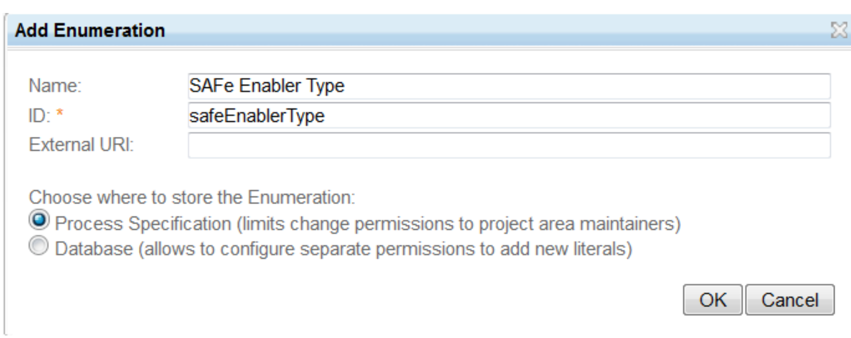
6. Click the Add... button to create a new SAFe Work Type enumeration.
7. Specify the **Name** and **ID**: `SAFe Work Type, safeWorkType`



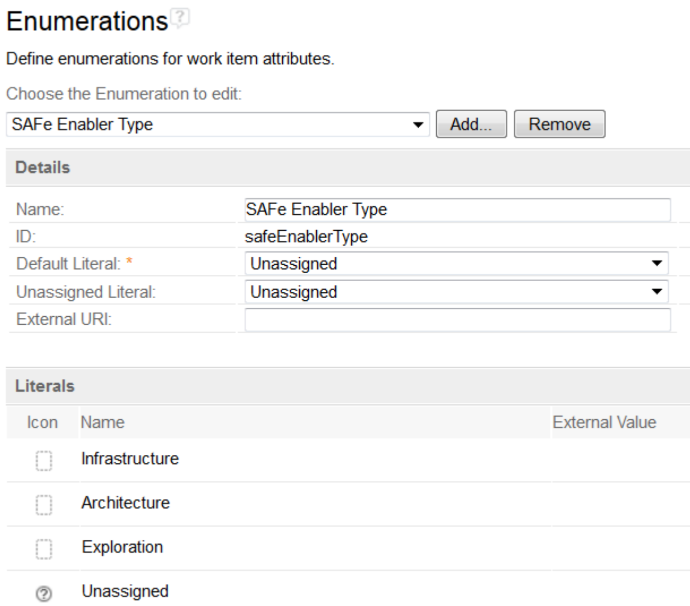
8. Select **Add...** to add literals: `Enabler`, `Business`. Set `Business` for the **Default** and **Unassigned Literal** values:



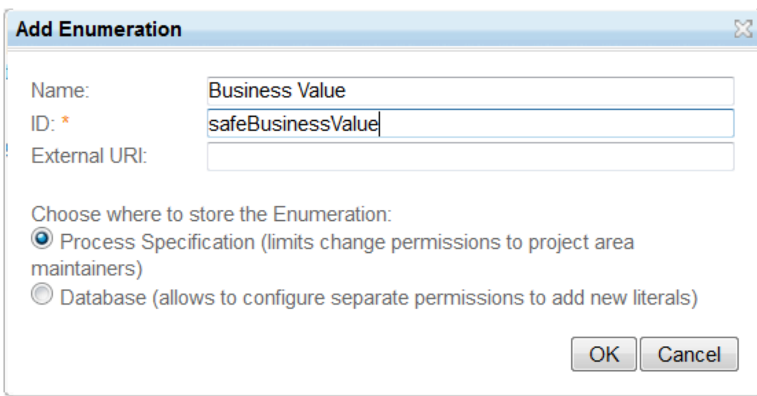
9. Click the **Add...** button to create a new **SAFe Enabler Type** enumeration.
10. Specify the **Name** and **ID**: `SAFe Enabler Type`, `safeEnablerType`



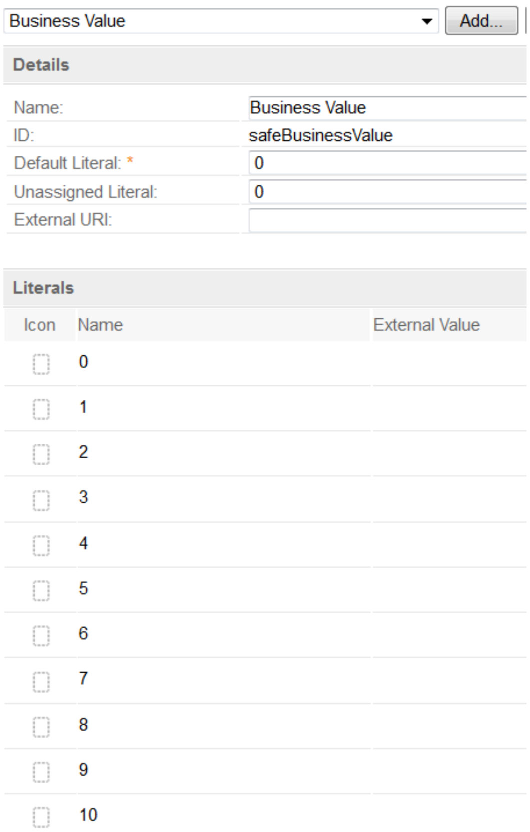
11. Select **Add...** to add literals: `Infrastructure`, `Architecture`, `Exploration`, `Unassigned`. Set `Unassigned` as the **Default** and **Unassigned Literal** values:



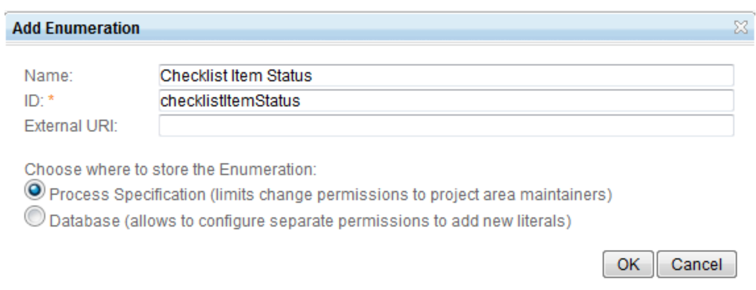
12. Click the **Add…** button to create a new **Business Value** enumeration.
13. Specify the **Name** and **ID**: `Business Value, safeBusinessValue`:



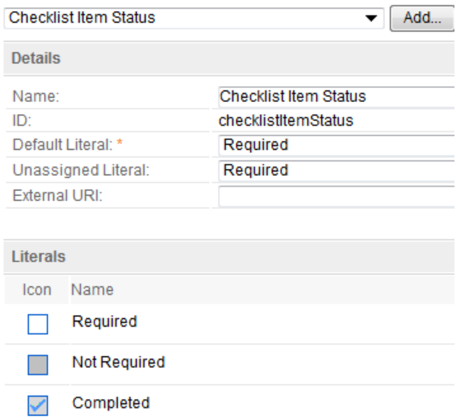
14. Select **Add…** to add literals: `0-10`. Set 0 as the **Default** and **Unassigned Literal** values:



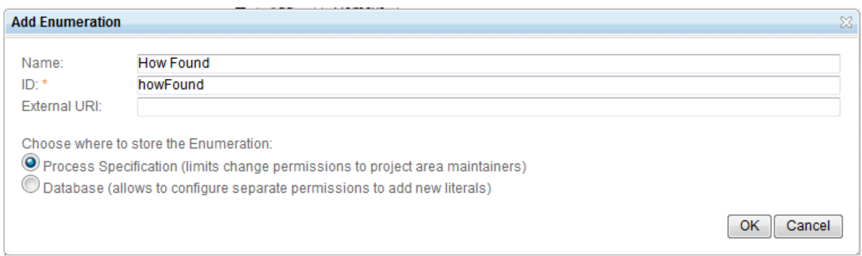
15. Click the **Add…** button to create a new **Checklist Item Status** enumeration.
16. Specify the **Name** and **ID**: `Checklist Item Status, checklistItemStatus`



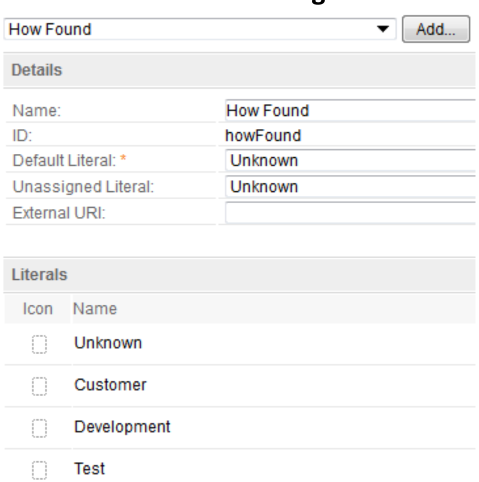
17. Select **Add…** to add literals: `Required, Complete, Not Required`. Set `Required` for the **Default** and **Unassigned Literal** values:



18. Click the **Add…** button to create a new **How Found** enumeration.
19. Specify the **Name** and **ID**: `How Found, howFound`

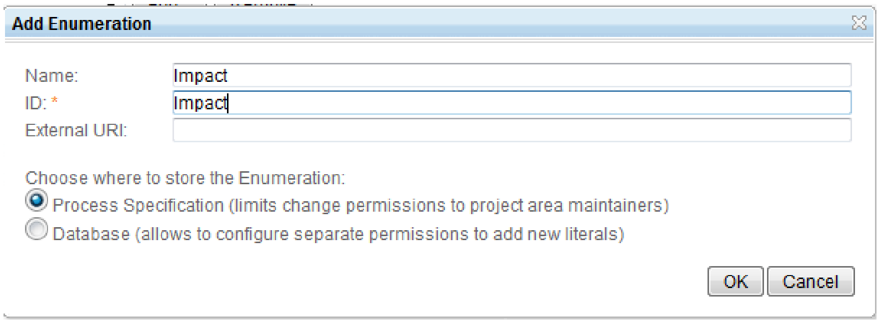


20. Select **Add…** to add literals: `Unknown, Customer, Development, Test`. **Set** `Unknown` for the **Default** and **Unassigned Literal** values:

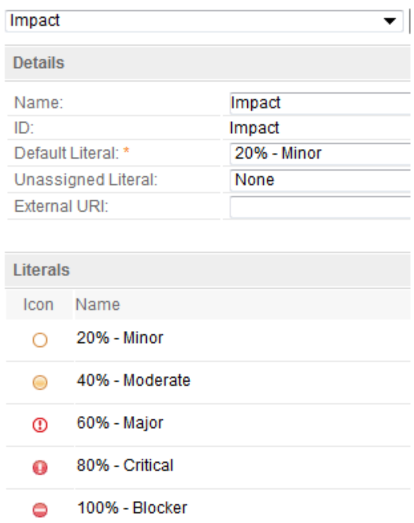


Add your own "How Found" enumeration literals as required for your organization.

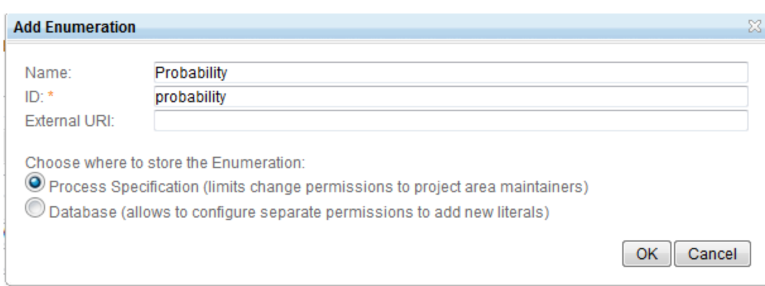
21. Click the **Add…** button to create a new **Impact** enumeration.
22. Specify the **Name** and **ID**: `Impact, impact`



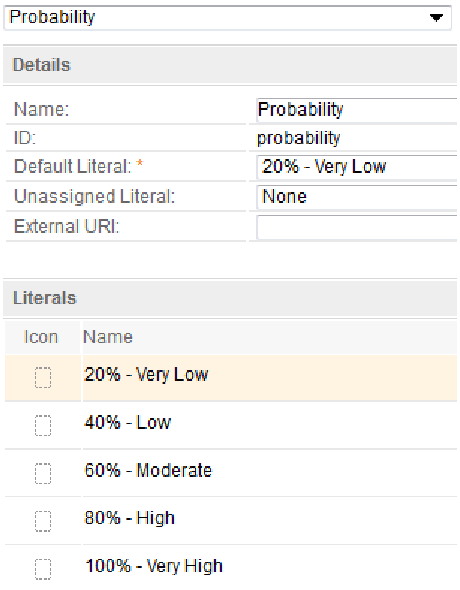
23. Select Add... to add literals: `20% - Minor, 40% - Moderate, 60% - Major, 80% - Critical`, and `100% - Blocker`. Set `20% - Minor` for the **Default** and `None` for the **Unassigned Literal** values:



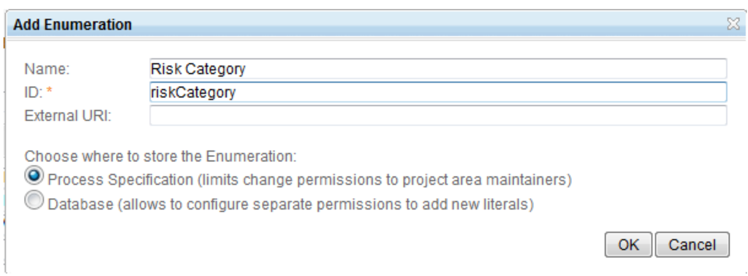
24. Click the **Add...** button to create a new **Probability** enumeration.
25. Specify the **Name** and **ID**: `Probability, probability`



26. Select Add... to add literals: `20% - Very Low, 40% - Low, 60% - Moderate, 80% - High`, and `100% - Very High`. Set `20% - Very Low` for the **Default** and `None` for the **Unassigned Literal** values:

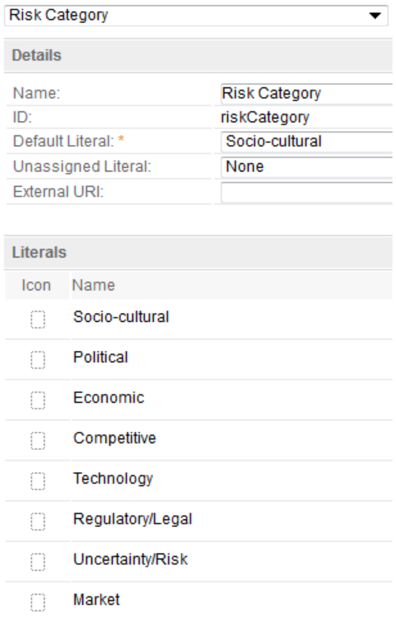


27. Click the **Add…** button to create a new **Risk Category** enumeration.
28. Specify the **Name** and **ID**: `Risk Category, riskCategory`



29. Select **Add…** to add literals: `Socio-cultural, Political, Economic, Competitive, Technology, Regulatory/Legal, Uncertainty/Risk, Market`. Set `Socio-cutural` for the **Default** and `None` for the **Unassigned Literal** values:

Add your own "Risk Category" enumeration literals as required for your organization.

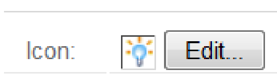


30. Save your changes.

WORK ITEM TYPES

PORTFOLIO EPIC

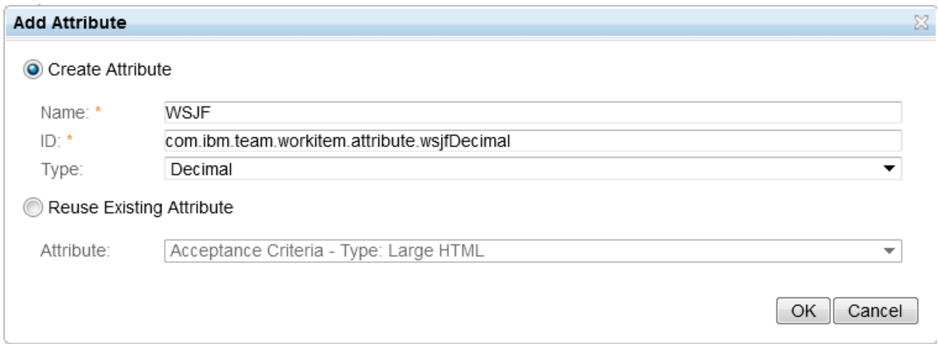
1. Select **Types and Attributes**.
2. Select the *Portfolio Epic*.
3. Change the icon so that you can distinguish it from the new Value Stream Epic type you will create later:



4. Scroll down to the **Attributes** section and locate the existing *WSJF* attribute. Click on the **Name** field to change the name to `WSJF (integer)`:

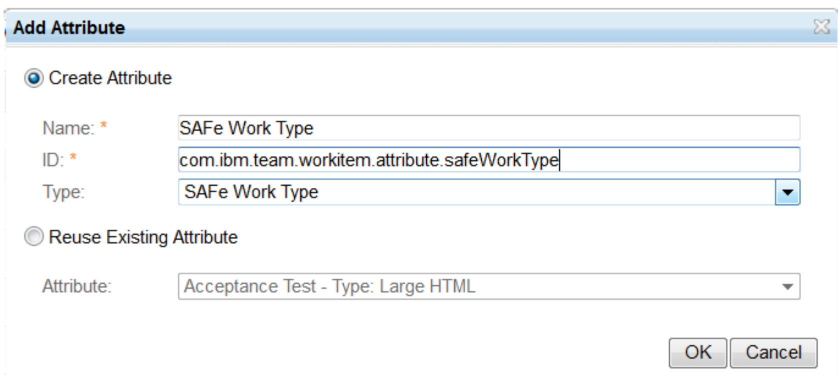
5. Click **Add…** to add a new *WSJF* attribute with these details:

Name: `WSJF`
ID: `com.ibm.team.workitem.attribute.wsjfDecimal`
Type: `Decimal`



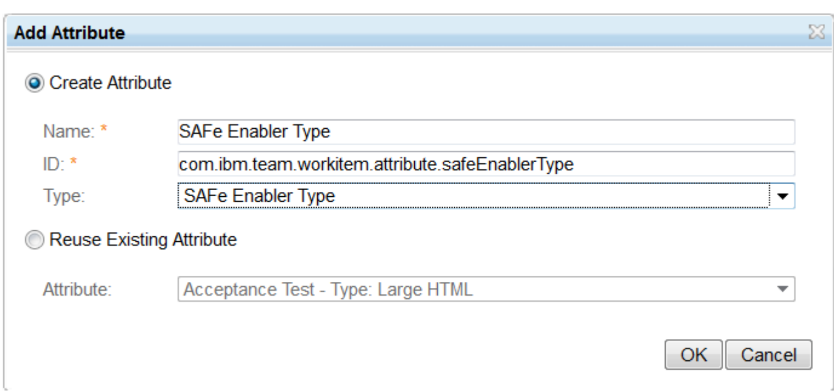
6. Scroll down to the **Attributes** section and click **Add...** to add the *SAFe Work Type* attribute.
7. Select the **Create Attribute** radio button and specify these details:

   Name: `SAFe Work Type`
   ID: `com.ibm.team.workitem.attribute.safeWorkType`
   Type: `SAFe Work Type`



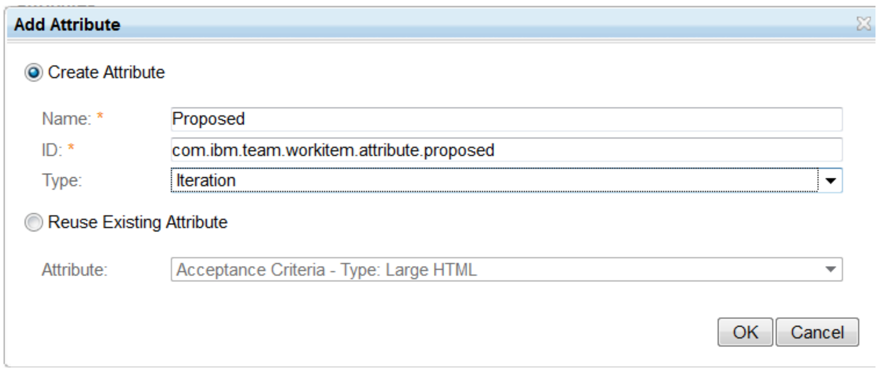
8. Click **Add...** to add the *SAFe Enabler Type* attribute.
9. Select the **Create Attribute** radio button and specify these details:

   Name: `SAFe Enabler Type`
   ID: `com.ibm.team.workitem.attribute.safeEnablerType`
   Type: `SAFe Enabler Type`



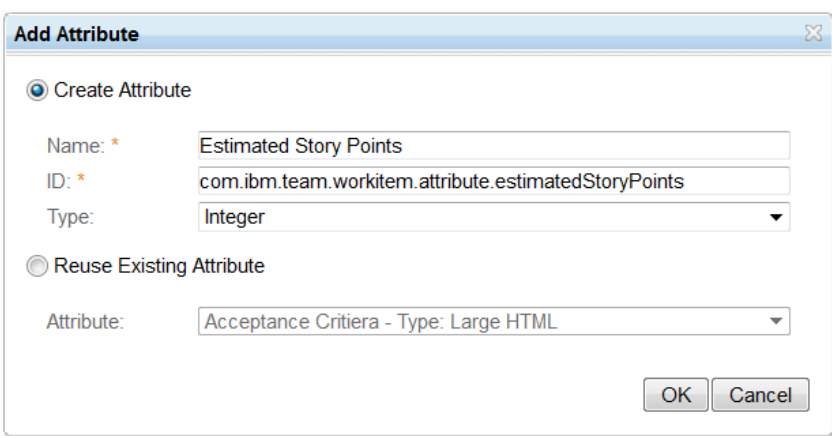
10. Click **Add…** to add the *Proposed* attribute.
11. Select the **Create Attribute** radio button and specify these details:

Name: `Proposed`
ID: `com.ibm.team.workitem.attribute.proposed`
Type: `Iteration`



12. Click **Add…** to add the *Estimated Story Points* attribute.
13. Select the **Create Attribute** radio button and specify these details:

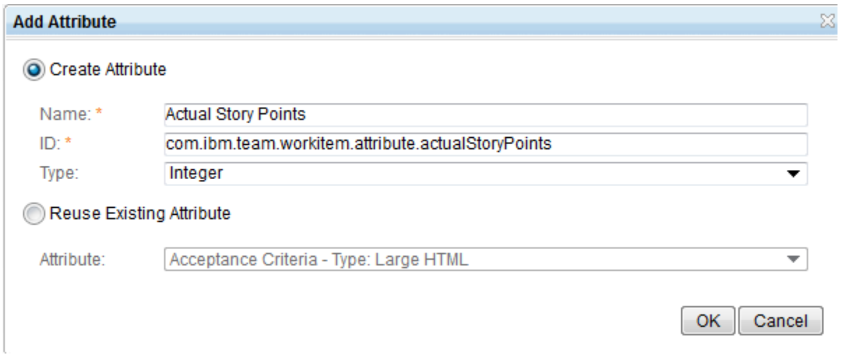
Name: `Estimated Story Points`
ID: `com.ibm.team.workitem.attribute.estimatedStoryPoints`
Type: `Integer`



14. Click **Add…** to add the *Actual Story Points* attribute.
15. Select the **Create Attribute** radio button and specify these details:

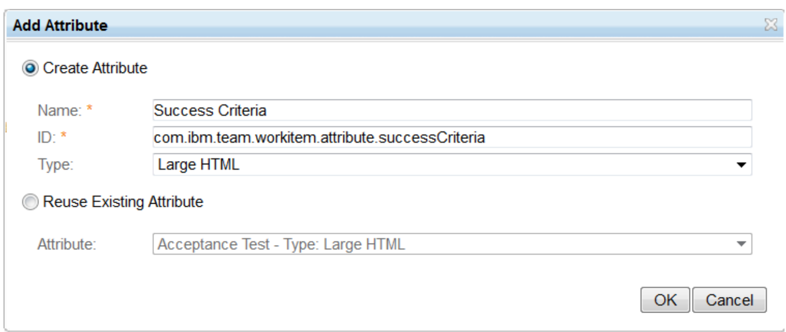
Name: `Actual Story Points`
ID: `com.ibm.team.workitem.attribute.actualStoryPoints`
Type: `Integer`

Note: If your organization prefers to reflect "effort" in terms of something other than Story Points, simply change the names of these attribute. For example, you might just call them ***Estimated Effort*** *and* ***Actual Effort****, which provides ultimate flexibility to measure "effort" in terms of Story Points, or Headcount, or Person Months, or anything else.*



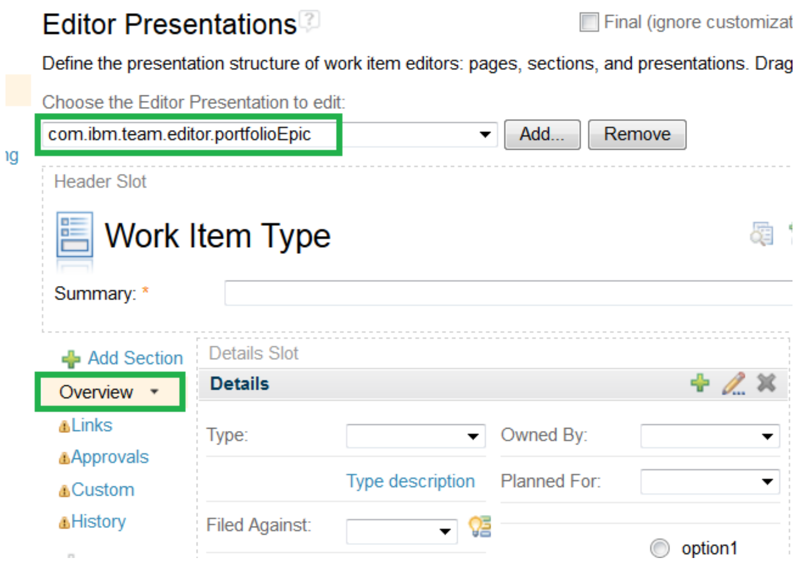
16. Click **Add…** to add a *Success Criteria* attribute.
17. Select the **Create Attribute** radio button and specify these details:

Name: `Success Criteria`
ID: `com.ibm.team.workitem.attribute.successCriteria`
Type: `Large HTML`



18. Remove the *Epic Type* attribute:

19. Save your changes.
20. Select **Editor Presentations**.
21. Select *com.ibm.team.editor.portfolioEpic* in the **Choose the Editor Presentation to edit:** selection list.
22. Make sure the *Overview* section is selected, then click the **+** on the **Details** bar:



23. Specify these details to add the *WSJF, SAFe Work Type, SAFe Enabler Type*, *Proposed, Estimated Story Points* and *Actual Story Points* with these details:

    Attribute: `WSJF`
    Kind: `Decimal`

    Attribute: `SAFe Work Type`
    Kind: `Radio Group`

    Attribute: `SAFe Enabler Type`
    Kind: `Radio Group`

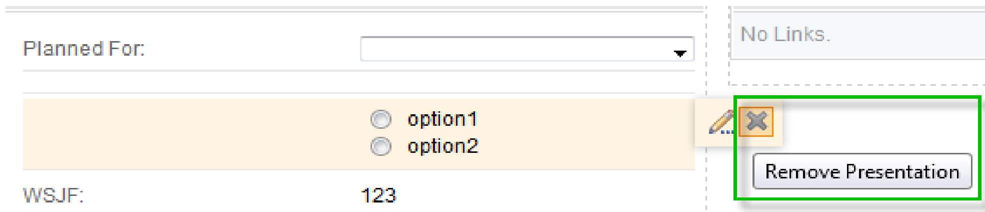
    Attribute: `Proposed`
    Kind: `Iteration`

    Attribute: `Estimated Story Points`
    Kind: `Integer`

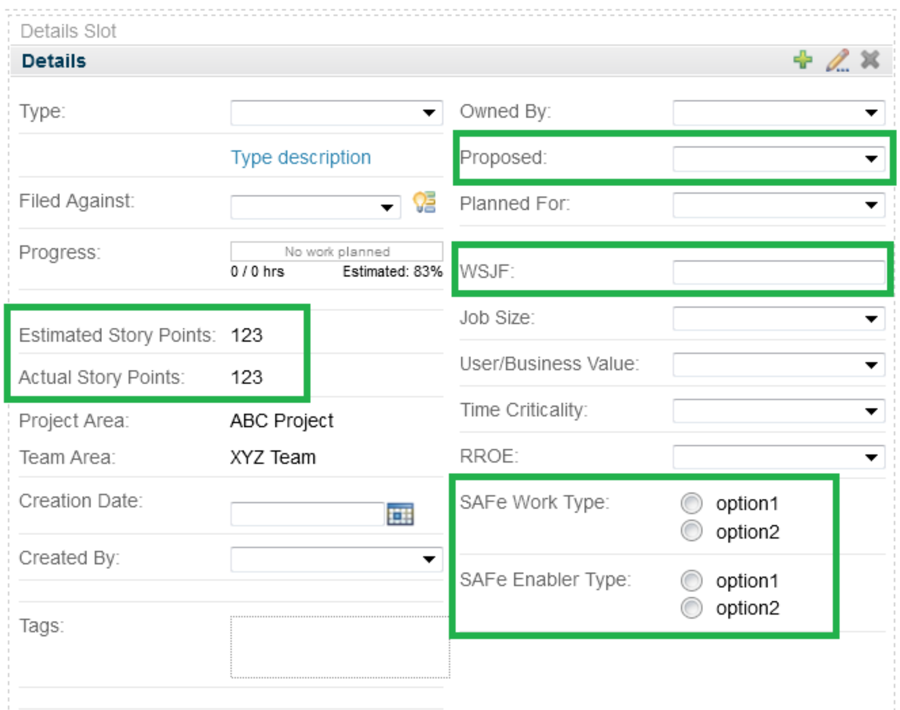
    Attribute: `Actual Story Points`
    Kind: `Integer`

24. Make these changes to position the attributes:
    a. Drag and drop the WSJF above renamed WSJF (integer) attribute
    b. Select the **Remove Presentation** icon next to the original WSJF (integer) attribute to remove it
    c. Drag and drop the *Estimated Story Points* and *Actual Story Points* under the **Progress** attribute
    d. Drag and drop the *Proposed* attribute before the *Planned For* attribute

e. Select the **Remove Presentation** icon next to the "empty" attribute because you deleted the Epic Type:

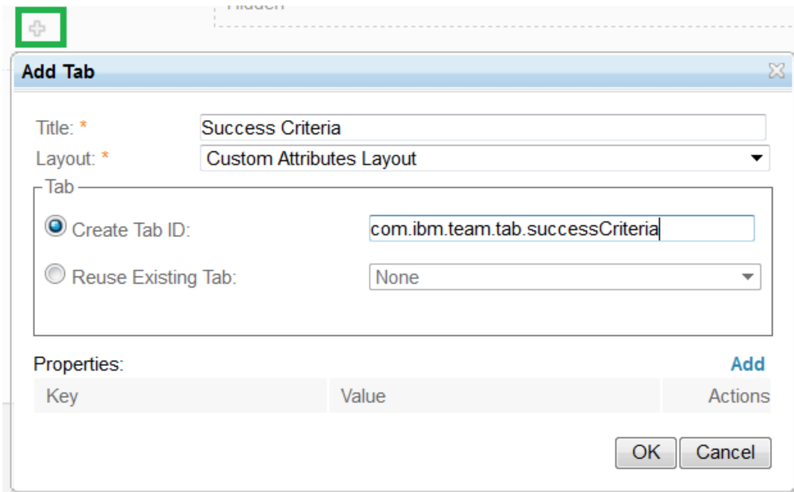


25. Your updated editor presentation should look like this:

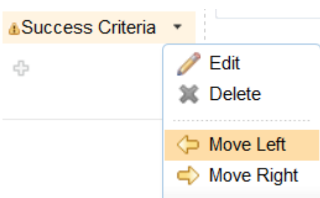


26. Click the ✚ under the *History* section to add a new tab for *Success Criteria*, specifying these details:

Title: `Success Criteria`
Layout: `Custom Attributes Layout`
Create Tab ID: `com.ibm.team.tab.successCriteria`

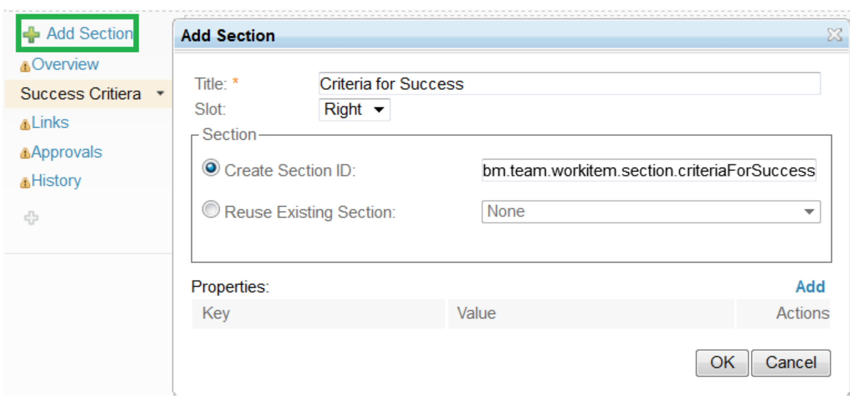


27. Use the **Success Criteria > Move Left** menu option to position this new tab after the *Overview* section:

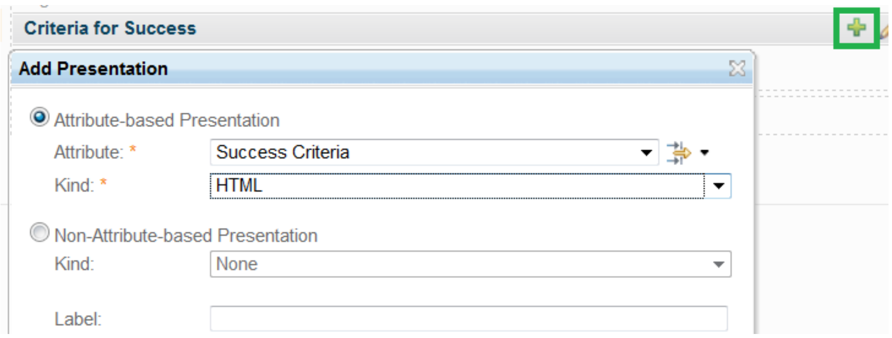


28. Select the *Success Criteria* tab and add a section, specifying these details:

Title : `Criteria for Success`
Slot : `Right`
Create Section ID : `com.ibm.team.workitem.section.criteriaForSuccess`

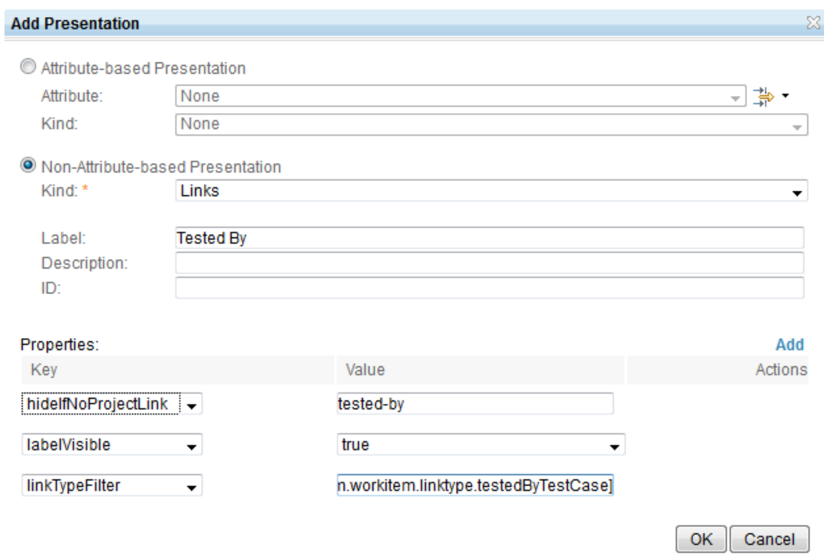


29. In the new **Criteria for Success** section, click the **+** to add an attribute:

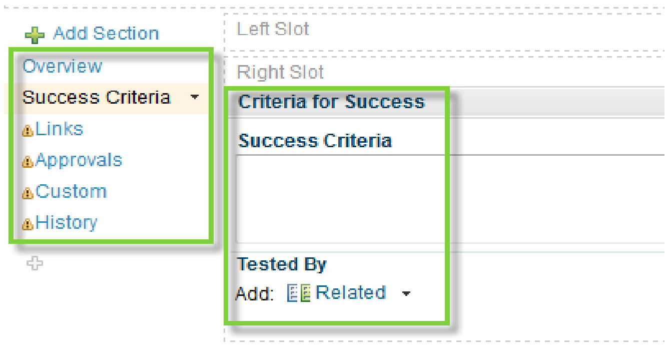


30. Add another attribute to the **Criteria for Success** section:

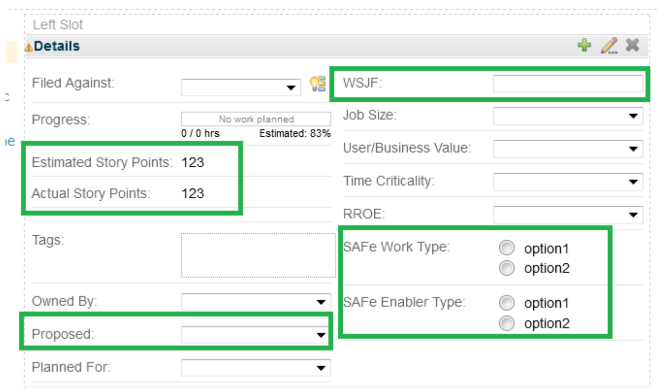
    Non-Attribute-based Presentation
    Kind: `Links`
    Label: `Tested By`
    Properties:
    - **hideifNoProjectLink** `tested-by`
    - **labelVisible** `true`
    - **linkTypeFilter** `[com.ibm.team.workitem.linktype.testedByTestCase]`



31. Your updated editor presentation for the *Success Criteria* tab should look like this:



32. Save your changes.
33. Select the *com.ibm.team.apt.planPreview* editor presentation.
    Select **Portfolio Epic** and add the *WSJF, SAFe Work Type, SAFe Enabler Type*, *Proposed, Estimated Story Points* and *Actual Story Points* as you did above. Delete the WSJF (integer) attribute and "empty" attribute left behind when you deleted the *Epic Type* attribute. Your presentation should look like this:



> ***Note:*** *If you are using the 6.0.1 versions of the templates, you will not have WSJF or its component attributes. Add them by just as you've added the other attributes.*

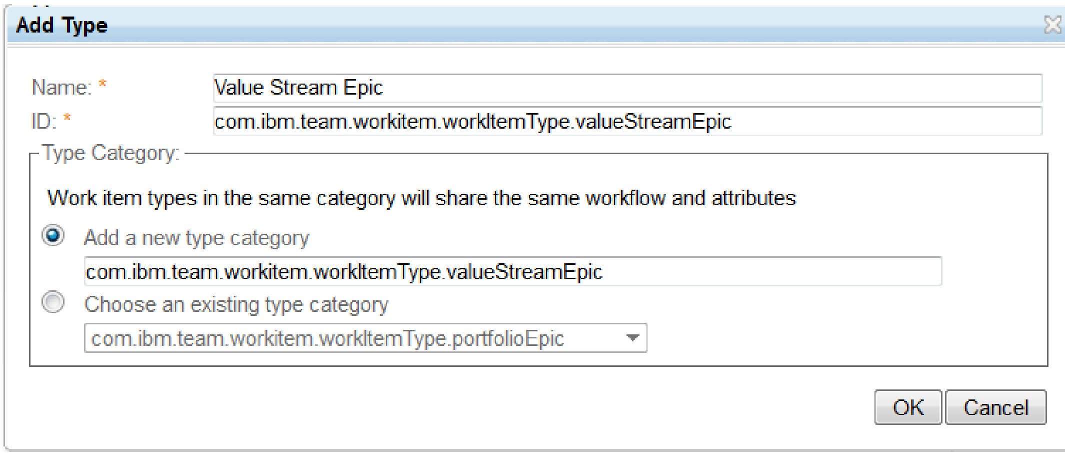
34. Save your changes.
35. Select the *com.ibm.team.workitem.web.inline* editor presentation.
    Select **Portfolio Epic** and add the *WSJF, SAFe Work Type, SAFe Enabler Type*, *Proposed, Estimated Story Points* and *Actual Story Points* as you did above.
36. Save your changes.

> ***Note:*** *There are some necessary workflow changes but these will be done in the Eclipse client because we must add a new State Group to complete the SAFe Kanban workflow.*

VALUE STREAM EPIC

1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

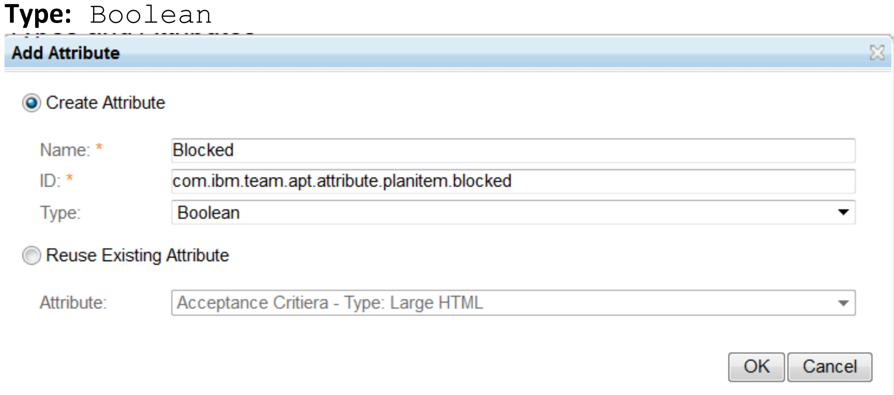
Name: `Value Stream Epic`
ID: `com.ibm.team.workitem.workItemType.valueStreamEpic`
Add a new type category: `com.ibm.team.workitem.workItemType.valueStreamEpic`



4. Click OK.
5. Choose an icon: 

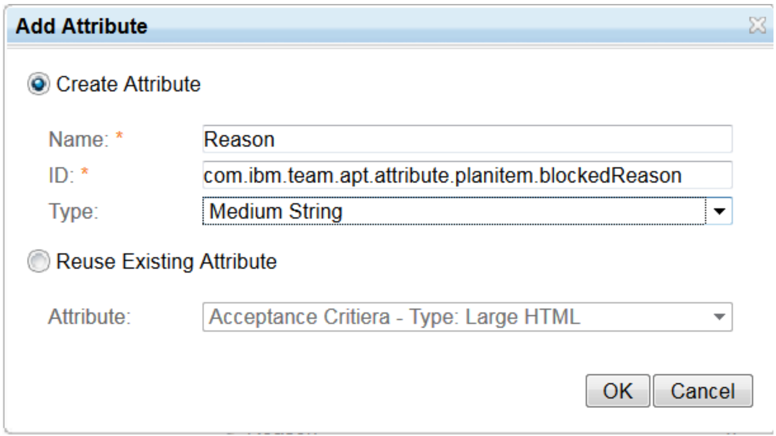
6. Scroll down to the **Attributes** section.
7. Click **Add…** to add a *Blocked* attribute:

Name: `Blocked`
ID: `com.ibm.team.apt.attribute.planitem.blocked`
Type: `Boolean`

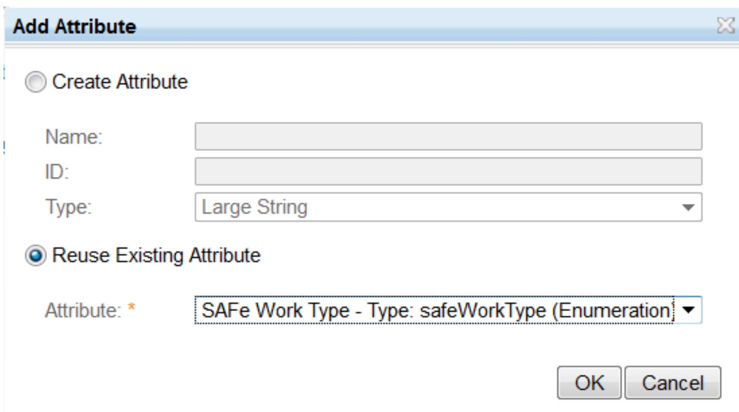


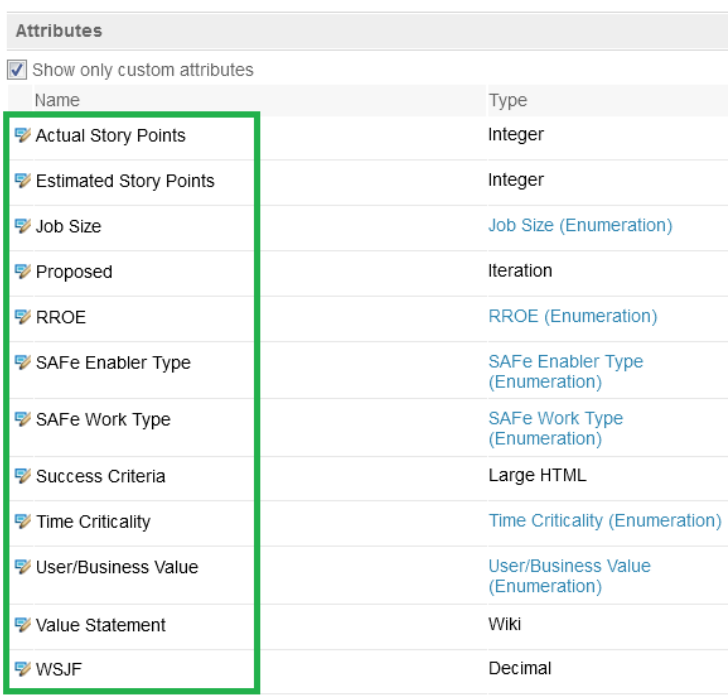
8. Click **Add…** to add a *Reason* attribute:

Name: `Reason`
ID: `com.ibm.team.apt.attribute.planitem.blockedReason`
Type: `Medium String`

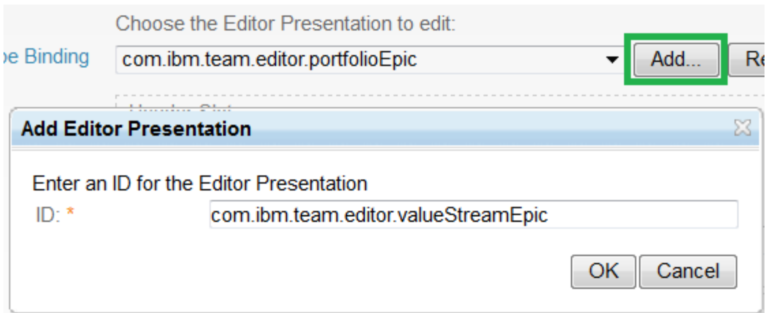


9. Add all of the attributes shown below, including the new *WSJF* attribute, that already exist on the *Portfolio Epic* by clicking **Add…** for each one and specifying **Reuse Existing Attribute**. For example:

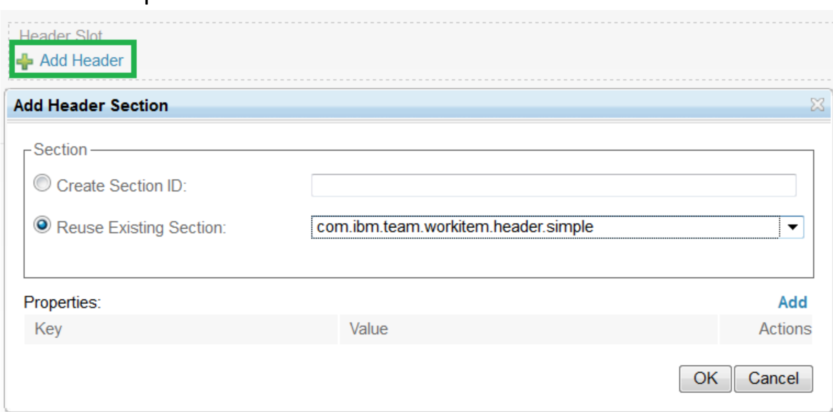




10. Save your changes.
11. Select **Editor Presentations**.
12. Click **Add…** to create a new `com.ibm.team.editor.valueStreamEpic` editor presentation:

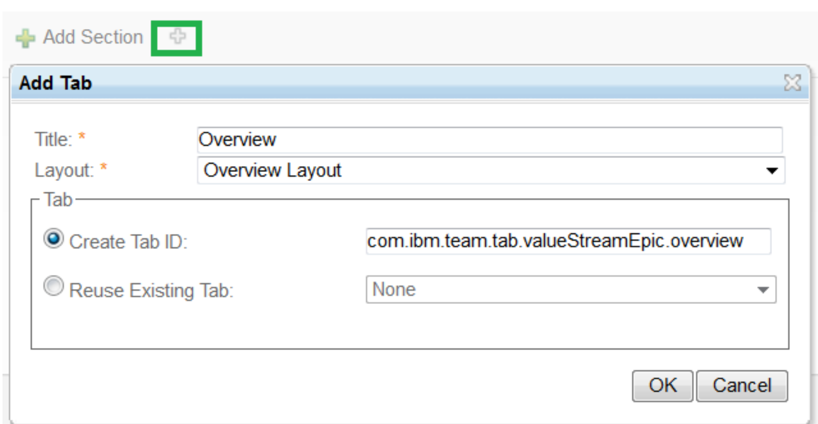


13. Add the simple header:



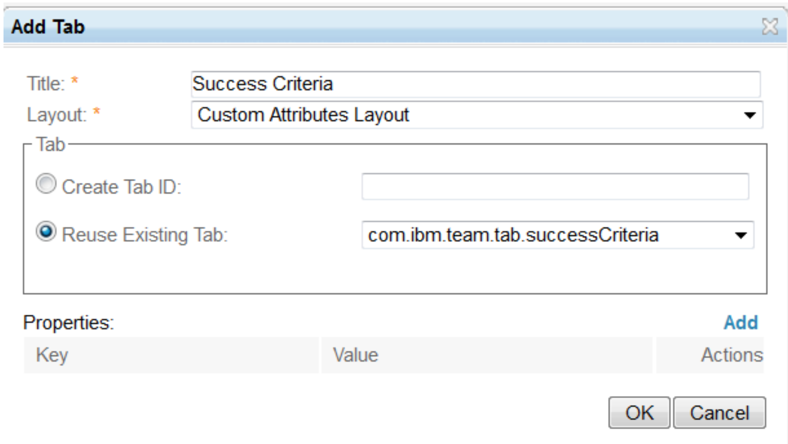
14. Add the *Overview* tab by clicking the **+** to the right of **Add Section**.
15. Specify these details:

Title: `Overview`
Layout: `Overview Layout`
Create Tab ID : `com.ibm.team.tab.valueStreamEpic.overview`



16. Click the under the new *Overview* section to add tabs for *Success Criteria, Links, Approvals,* and *History,* specifying the details provided below for each section:

Title: `Success Criteria`
Layout: `Custom Attributes Layout`
Reuse Existing Tab: `com.ibm.team.tab.successCriteria`



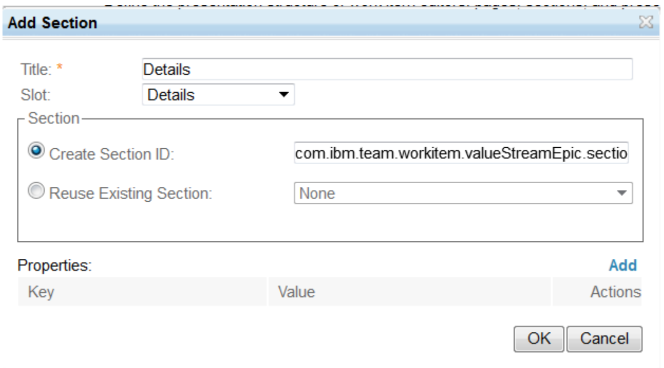
Title: `:Links`
Layout: `Links Layout`
Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

Title: `Approvals`
Layout: `Approvals Layout`
Resuse Existing Tab : `com.ibm.team.workitem.tab.approvals`

Title: `History`
Layout: `History Layout`
Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

17. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary***,** specifying the details provided below for each section:

Title: `Details`
Slot: `Details`
Create Section ID: `com.ibm.team.workitem.valueStreamEpic.section.details`



Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Value Statement`
Slot: `Description`
Reuse Existing Section:
`com.ibm.team.workitem.section.portfolioEpic.valuestatement`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

18. Save your changes.
19. In the **Details** section of the *Overview* tab, click the + to add the following attributes, providing these details:

Attribute: `Type`
Kind: `Enumeration`

Non-Attribute-based Presentation: `Static Rich Text`
Rich Text: `Type Description` (with URL link: http://ibm.biz/Bd4xhY)

Attribute: `Filed Against`
Kind: `Category`

Non-Attribute-based Presentation: `Work Progress`

Attribute: `Estimated Story Points`
Kind: `Integer`

Attribute: `Actual Story Points`
Kind: `Integer`

Non-Attribute-based Presentation: `Team and Project Area`

Attribute: `Creation Date`
Kind: `Timestamp`

Attribute: `Created By`
Kind: `Contributor`

Attribute: `Tags`
Kind: `Tags`

Attribute: `Owned By`
Kind: `Contributor`

Attribute: `Proposed`
Kind: `Iteration`

Attribute: `Planned For`
Kind: `Iteration`

Attribute: `WSJF`
Kind: `Decimal`

Attribute: `Job Size`
Kind: `Enumeration`

Attribute: `User/Business Value`
Kind: `Enumeration`

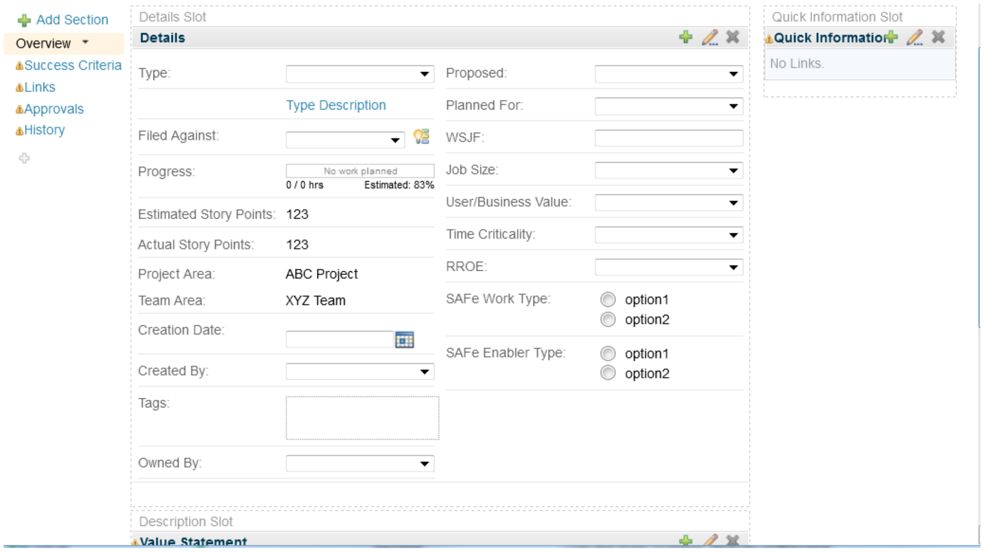
Attribute: `Time Criticality`
Kind: `Enumeration`

Attribute: `RROE`
Kind: `Enumeration`

Attribute: `SAFe Work Type`
Kind: `Radio Group`

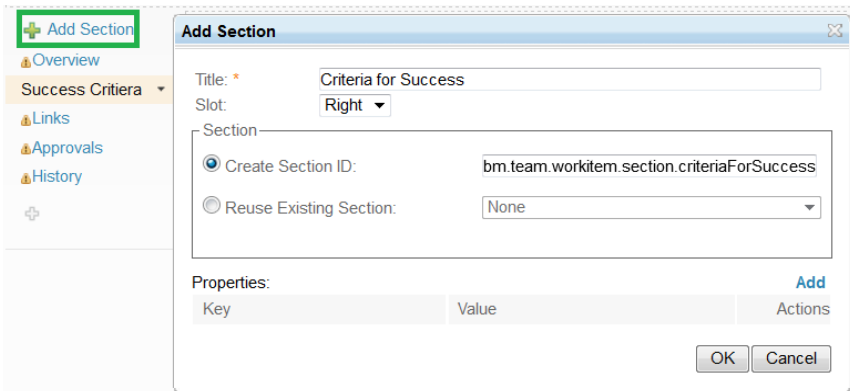
Attribute: `SAFe Enabler Type`
Kind: `Radio Group`

Your presentation should look like this:

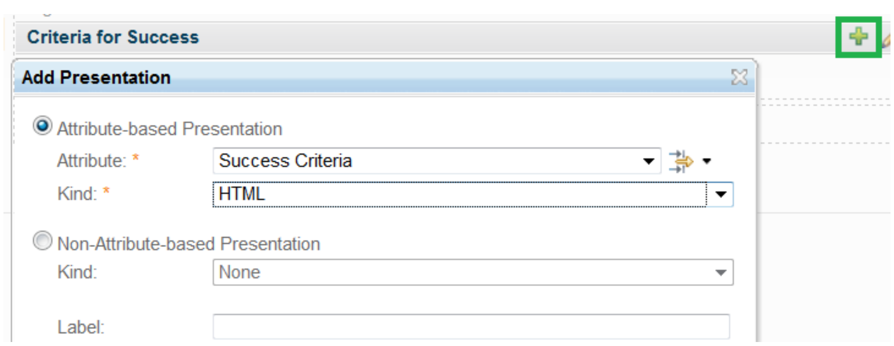


20. Select the *Success Criteria* tab and add a section, specifying these details:

Title: `Criteria for Success`
Slot: `Right`
Create Section ID: `com.ibm.team.workitem.section.criteriaForSuccess`

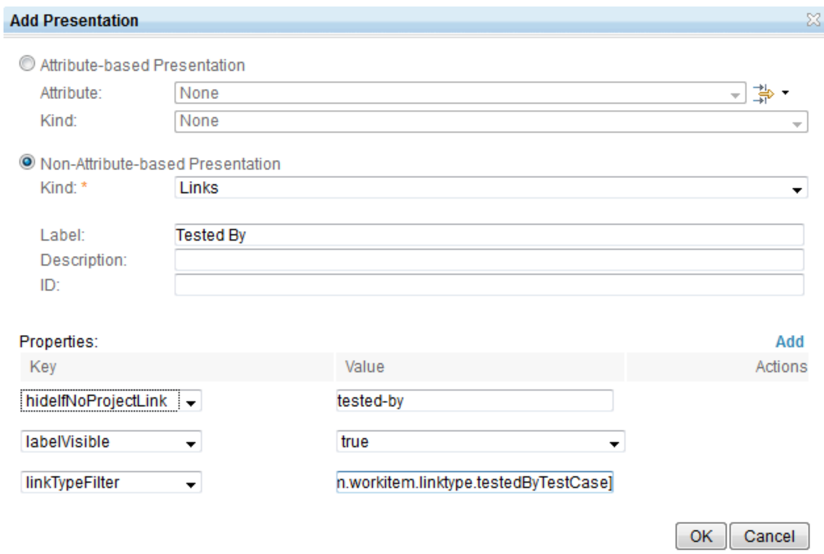


21. In the new **Criteria for Success** section, click the + to add an attribute:

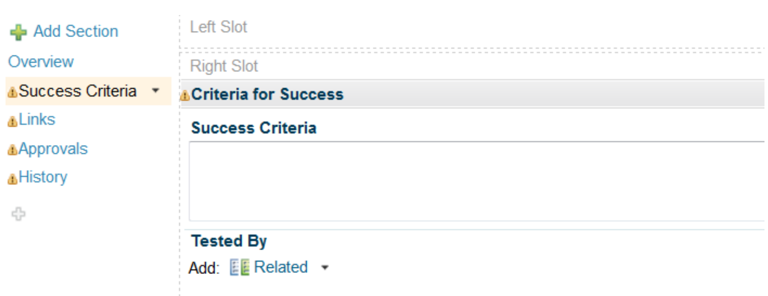


22. Add another attribute to the **Criteria for Success** section:

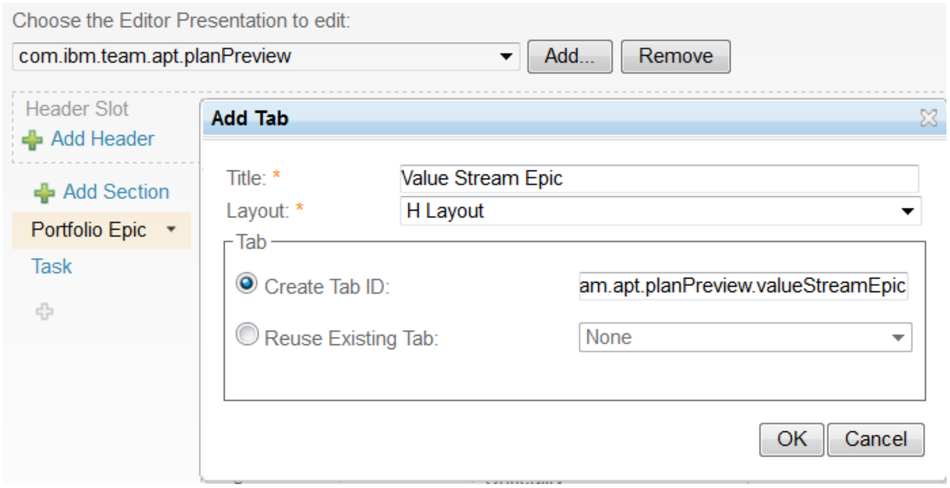
    Non-Attribute-based Presentation
    Kind : `Links`
    Label : `Tested By`
    Properties:
        hideifNoProjectLink `tested-by`
        labelVisible `true`
        linkTypeFilter `[com.ibm.team.workitem.linktype.testedByTestCase]`



23. Your updated editor presentation for the *Success Criteria* tab should look like this:

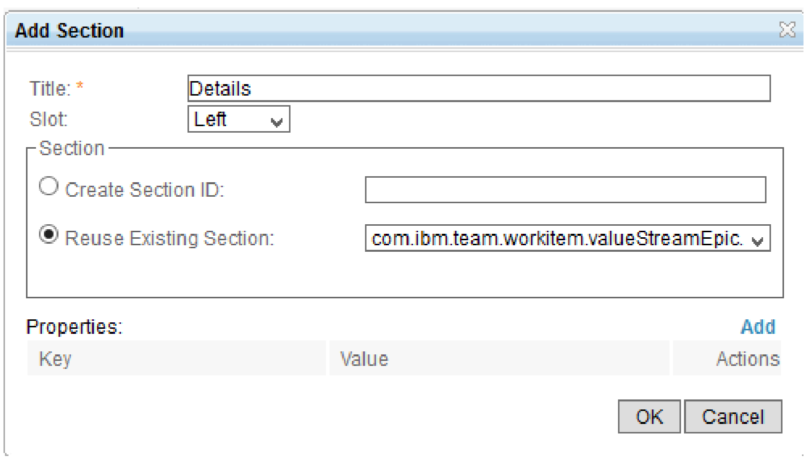


24. Save your changes.
25. Select the *com.ibm.team.apt.planPreview* editor presentation.
26. Click the ✚ to add a new tab for *Value Stream Epic.*
27. Specify these details:
    Title: `Value Stream Epic`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.valueStreamEpic`



28. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section:
`com.ibm.team.workitem.valueStreamEpic.section.details`



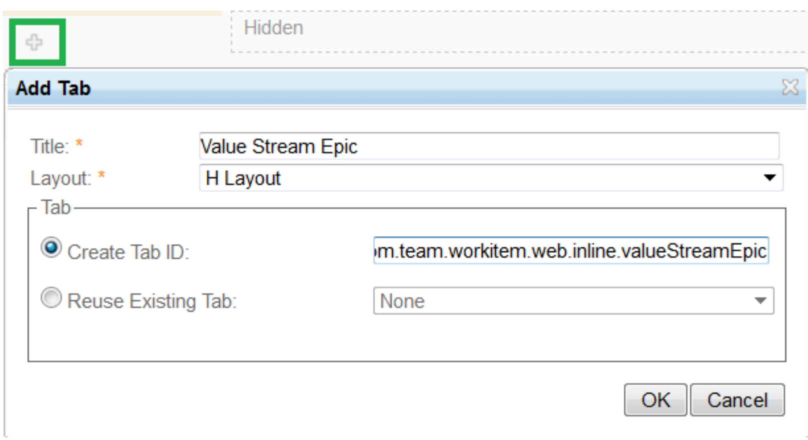
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader,` **Value:** `true`

Title: `Value Statement`
Slot: `Bottom`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.portfolioEpic.valueStatement`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

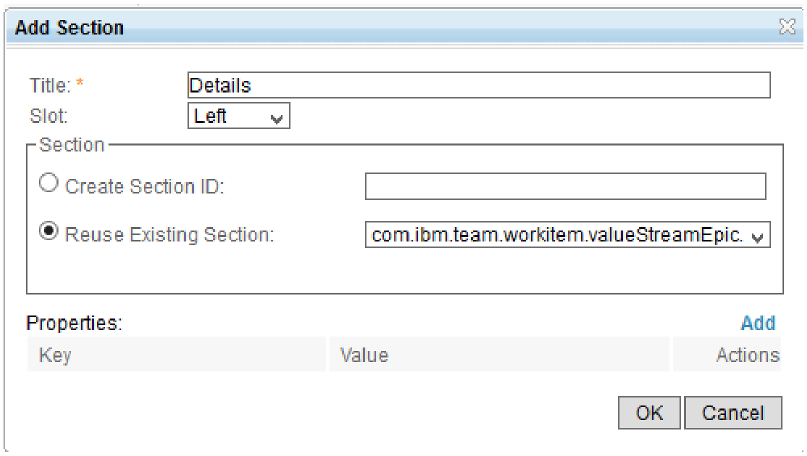
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

29. Save your changes.
30. Select the *com.ibm.team.workitem.web.inline* editor presentation.
31. Click the ✚ to add a new tab for *Value Stream Epic.*
32. Specify these details:
Title: `Value Stream Epic`
Layout: `H Layout`
Create Tab ID: `com.ibm.team.workitem.web.inline.valueStreamEpic`



33. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section:
`com.ibm.team.workitem.valueStreamEpic.section.details`



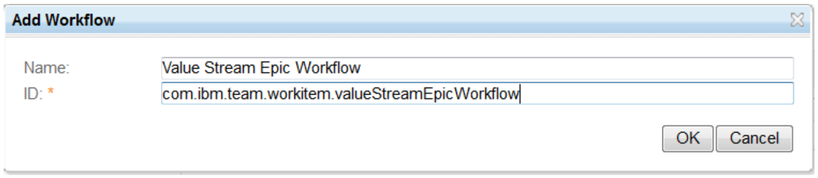
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section:
`com.ibm.team.workitem.web.inline.section.quickinformation`
Key: `noHeader,` **Value:** `true`

Title: `Value Statement`
Slot: `Bottom`
Reuse Existing Section:
`com.ibm.team.workitem.web.inline.portfolioEpic.valueStatement`

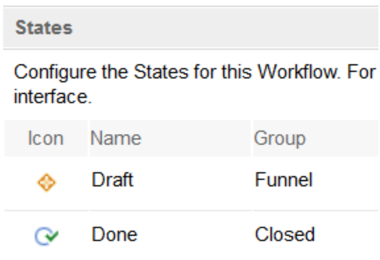
Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.web.inline.section.discussion`
Key: `expanded,` **Value:** `false`

Title: `Summary`
Slot: `Top`
Create Section ID: `com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader,` **Value:** `true`

34. Save your changes.
35. Select **Workflows** and then **Add…** to create a new Value Stream workflow.
36. Specify the **Name** and **ID**: `Value Stream Epic Workflow,` `com.ibm.team.workitem.valueStreamEpicWorkflow`



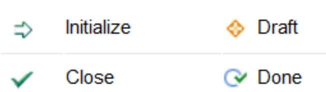
37. Click OK. Ignore the error about no start action… we're getting there!
38. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:



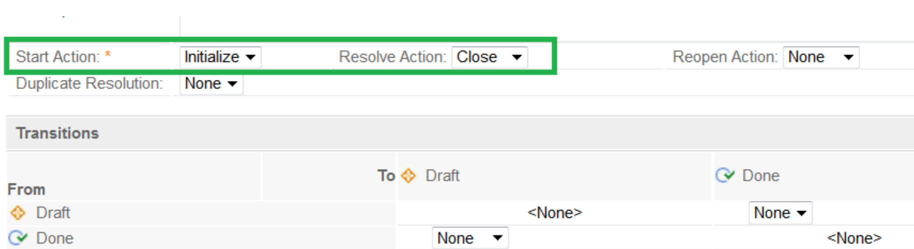
Note: *For Value Stream Epic and Capability, we will only put basic workflow in place for now. We will complete this in the Eclipse client because we must add a new State Group to complete the SAFe Kanban workflow.*

If you don't have all of these specific icons, choose something you have that makes sense.

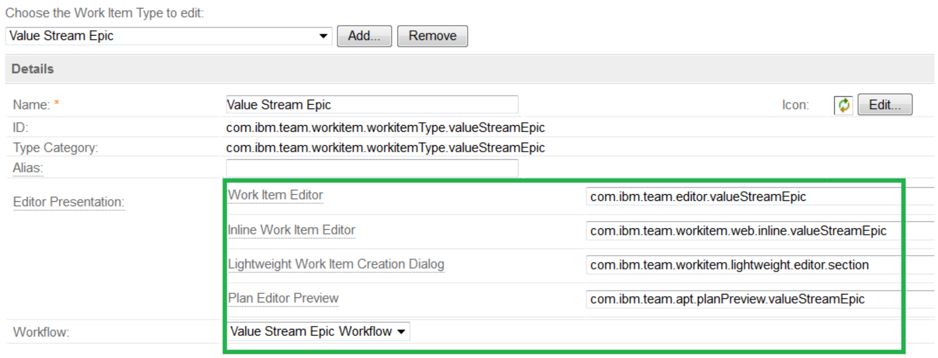
39. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.



40. Specify the **Start Action** and **Resolve Action** in the **Transitions** section.



41. Save your changes.
42. Select **Types and Attributes**.
43. Select *Value Stream Epic*.
44. Set the **Editors** and **Workflow** as shown below:

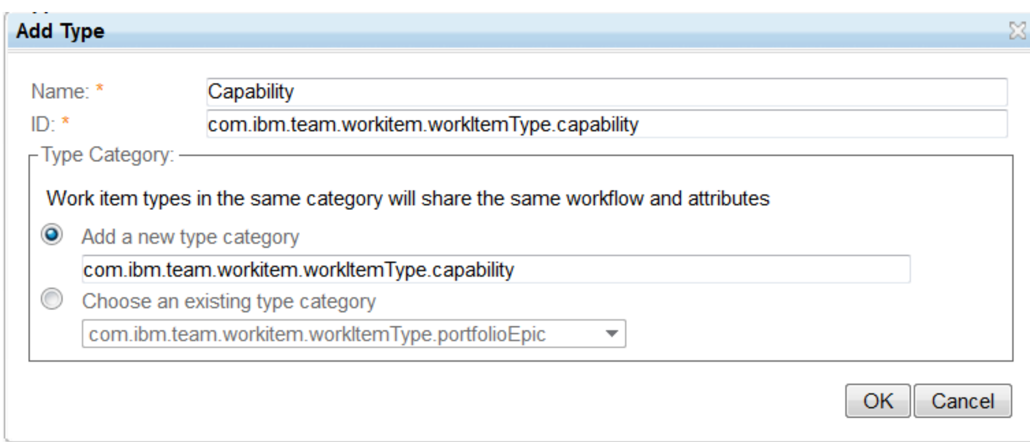


45. Save your changes.

CAPABILITY

1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

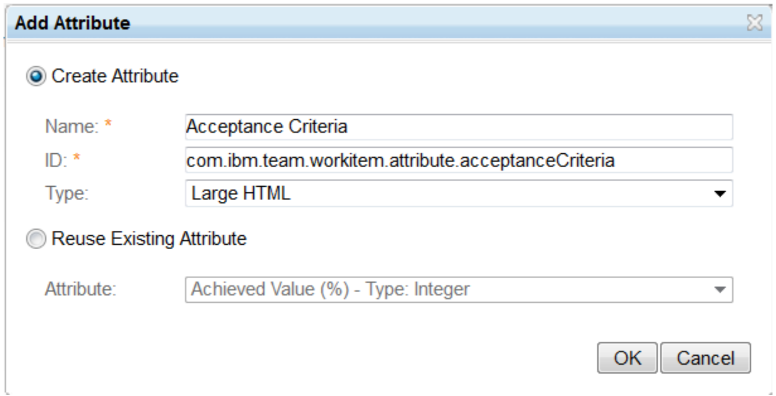
Name: `Capability`
ID: `com.ibm.team.workitem.workItemType.capability`
Add a new type category: `com.ibm.team.workitem.workItemType.capability`



4. Click OK.
5. Choose an icon: 

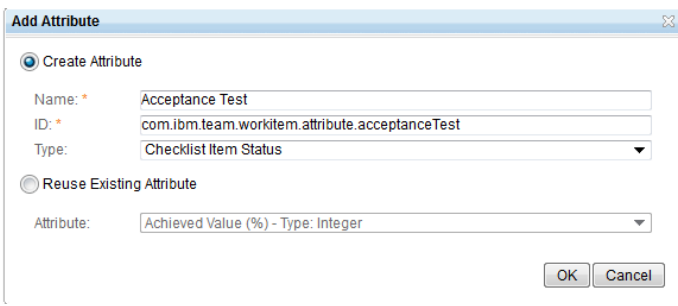
6. Scroll down to the **Attributes** section.
7. Click **Add…** to add an *Acceptance Criteria* attribute.
8. Specify these details:

Name: `Acceptance Criteria`
ID: `com.ibm.team.workitem.attribute.acceptanceCriteria`
Type: `Large HTML`



9. Click **Add...** to add an *Acceptance Test* attribute.
10. Specify these details:

    Name: `Acceptance Test`
    ID: `com.ibm.team.workitem.attribute.acceptanceTest`
    Type: `Checklist Item Status`



11. Add the rest of the "done criteria" checklist item attributes by specifying these details for *Documentation, Performance Test, UX Design*:

    Name: `Documentation`
    ID: `com.ibm.team.workitem.attribute.documentation`
    Type: `Checklist Item Status`

    Name: `Performance Test`
    ID: `com.ibm.team.workitem.attribute.performanceTest`
    Type: `Checklist Item Status`

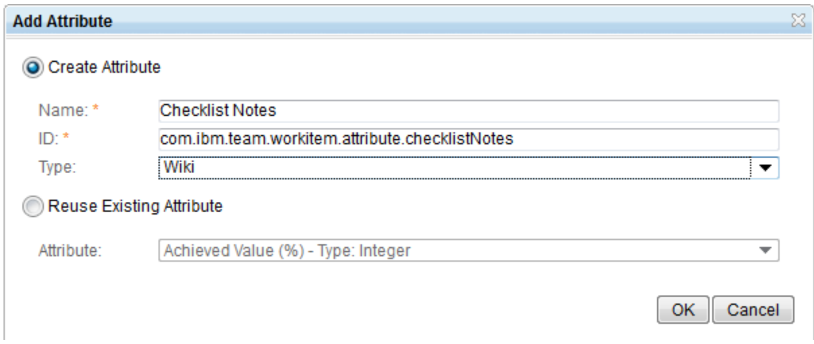
    Name: `UX Design`
    ID: `com.ibm.team.workitem.attribute.uxDesign`
    Type: `Checklist Item Status`

Feel free to add any "done criteria" attributes you would like to track in your organization.

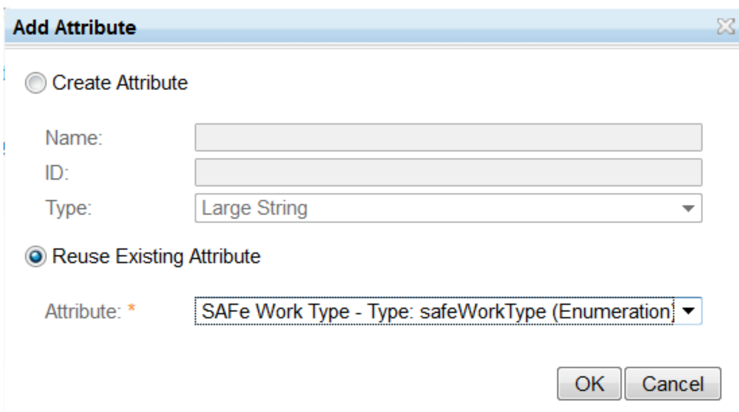
12. Click **Add...** to add a *Checklist Notes* attribute.

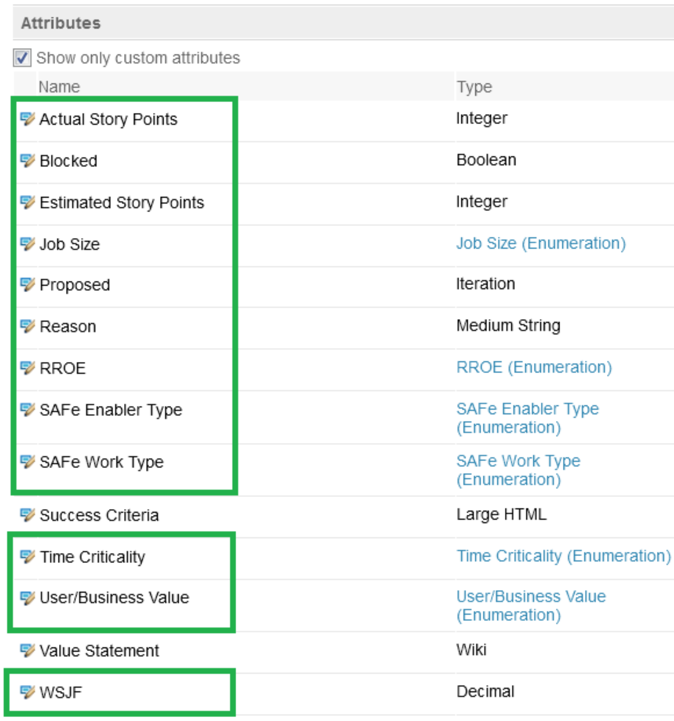
13. Specify these details:

    Name: `Checklist Notes`
    ID: `com.ibm.team.workitem.attribute.checklistNotes`
    Type: `Wiki`

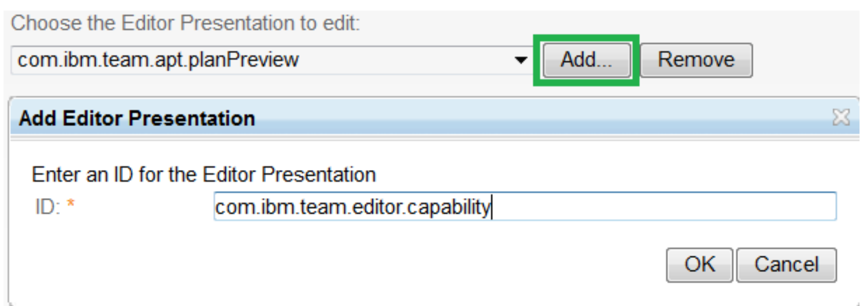


14. Add the rest of the attributes shown below that already exist in the *Value Stream Epic* by clicking **Add...** for each one and specifying **Reuse Existing Attribute**. For example:

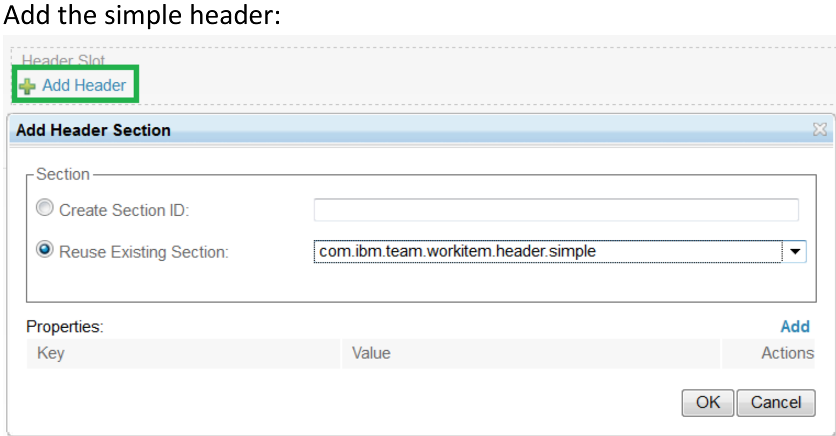




15. Save your changes.
16. Select **Editor Presentations**.
17. Click **Add...** to create a new `com.ibm.team.editor.capability` editor presentation:

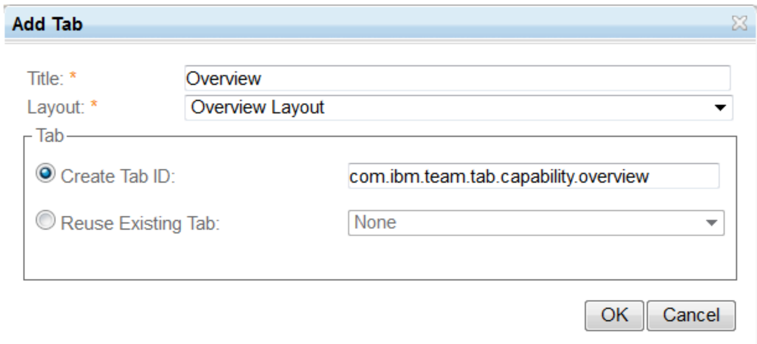


18. Add the simple header:



19. Add the *Overview* tab by clicking the + to the right of **Add Section**.
20. Specify these details:

    Title: `Overview`
    Layout: `Overview Layout`
    Create Tab ID : `com.ibm.team.tab.capability.overview`



21. Click the + under the new *Overview* section to add tabs for *Acceptance Criteria, Done Criteria, Links, Approvals,* and *History,* specifying the details provided below for each section:

    Title: `Acceptance Criteria`
    Layout: `Custom Attributes Layout`
    Create Tab ID: `com.ibm.team.tab.acceptanceCriteria`

    Title: `Done Criteria`
    Layout: `Custom Attributes Layout`
    Create Tab ID: `com.ibm.team.tab.doneCriteria`

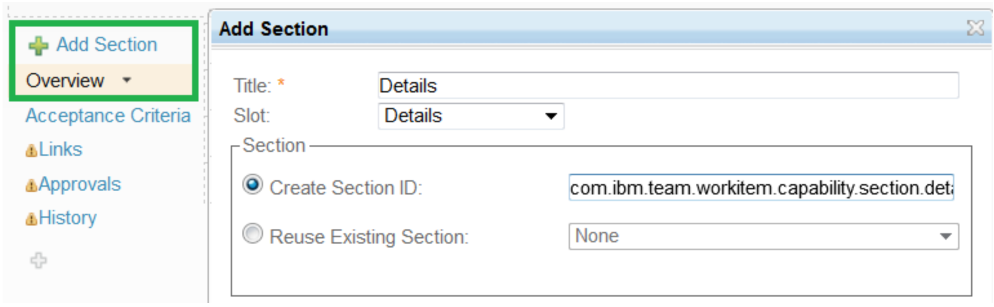
    Title: `:Links`
    Layout: `Links Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

    Title: `Approvals`
    Layout: `Approvals Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.approvals`

    Title: `History`
    Layout: `History Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

22. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary*, specifying the details provided below for each section:

Title: `Details`
Slot: `Details`
Create Section ID: `com.ibm.team.workitem.capability.section.details`



Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Description`
Slot: `Description`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

23. Save your changes.
24. In the **Details** section of the *Overview* tab, click the + to add the following attributes, specifying these details:
    Attribute: `Type`
    Kind: `Enumeration`

    Non-Attribute-based Presentation: `Static Rich Text`
    Rich Text: `Type Description` (with URL link: http://ibm.biz/Bd4xhF)

    Attribute: `Filed Against`
    Kind: `Category`

    Non-Attribute-based Presentation: `Work Progress`

    Attribute: `Estimated Story Points`
    Kind: `Integer`

    Attribute: `Actual Story Points`
    Kind: `Integer`

Non-Attribute-based Presentation: Team and Project Area

Attribute: Creation Date
Kind: Timestamp

Attribute: Created By
Kind: Contributor

Attribute: Tags
Kind: Tags

Attribute: Owned By
Kind: Contributor

Attribute: Proposed
Kind: Iteration

Attribute: Planned For
Kind: Iteration

Attribute: WSJF
Kind: Decimal

Attribute: Job Size
Kind: Enumeration

Attribute: User/Business Value
Kind: Enumeration

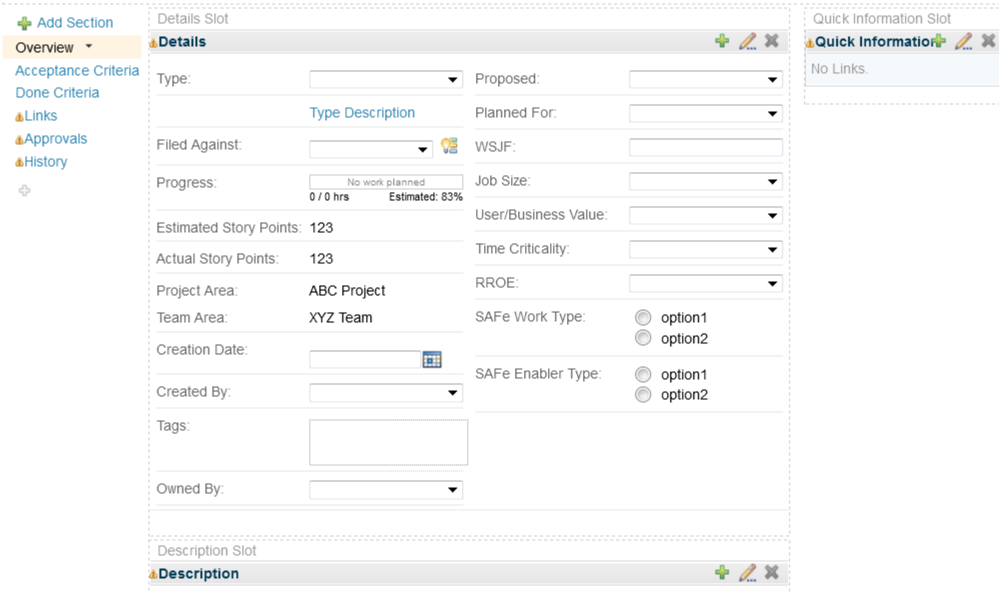
Attribute: Time Criticality
Kind: Enumeration

Attribute: RROE
Kind: Enumeration

Attribute: SAFe Work Type
Kind: Radio Group

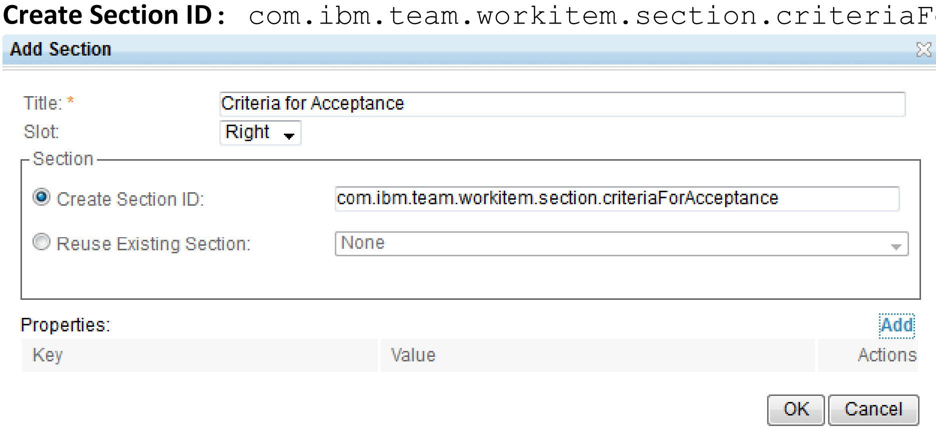
Attribute: SAFe Enabler Type
Kind: Radio Group

Your presentation should look like this:

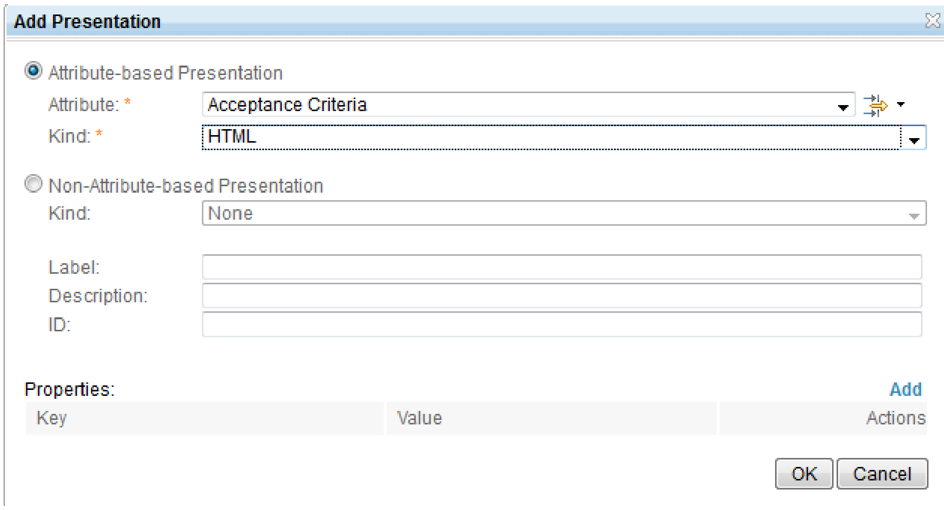


25. Save your changes.
26. Select the *Acceptance Criteria* tab and then the **+ Add Section** to add a section:

Title : `Criteria for Acceptance`
Slot : `Right`
Create Section ID : `com.ibm.team.workitem.section.criteriaForAcceptance`



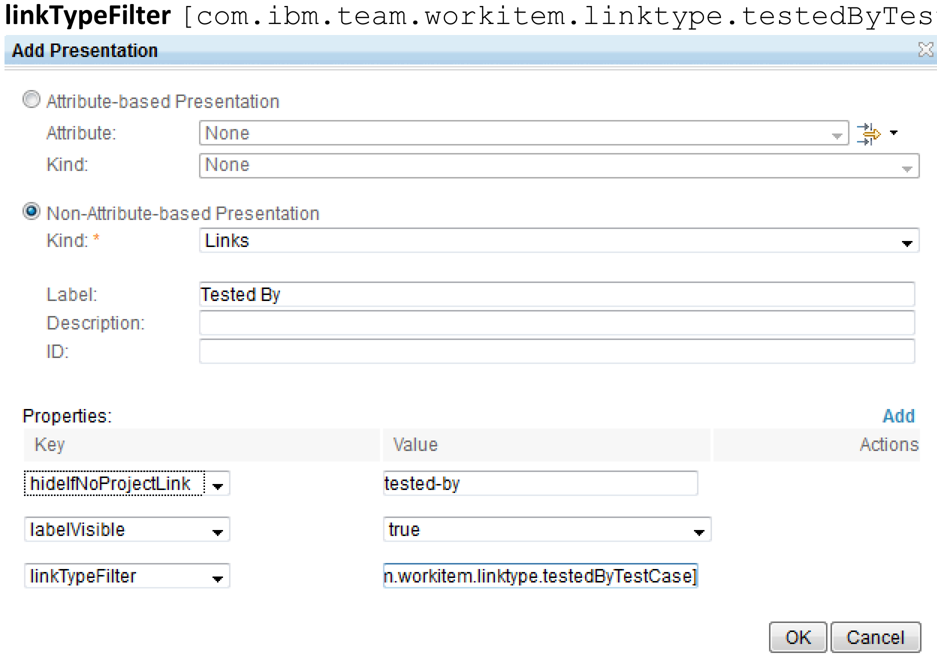
27. In the new **Criteria for Acceptance** section, click the **+** to add an attribute:
Attribute : `Acceptance Criteria`
Kind : `HTML`



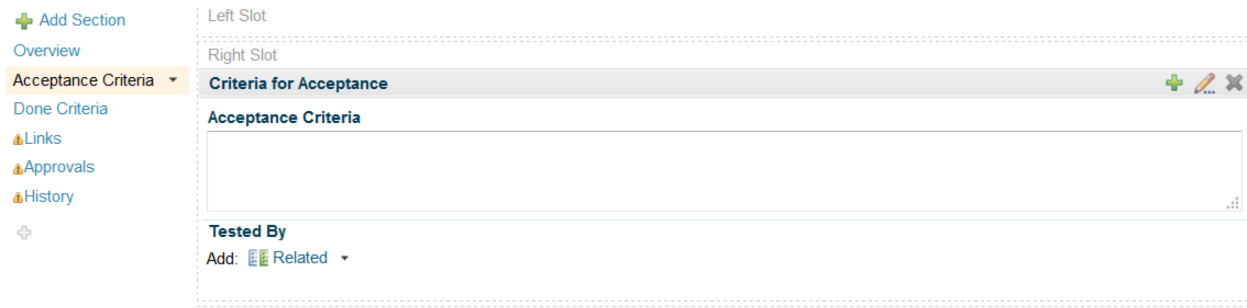
28. Add another attribute to the **Criteria for Acceptance** section:

Non-Attribute-based Presentation
Kind: `Links`
Label: `Tested By`
Properties:

hideifNoProjectLink `tested-by`
labelVisible `true`
linkTypeFilter `[com.ibm.team.workitem.linktype.testedByTestCase]`

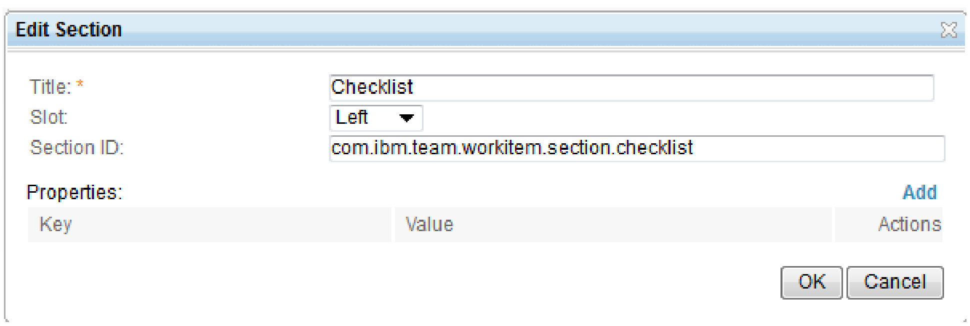


29. Save your changes.
30. Your **Acceptance Criteria** tab should look like this:

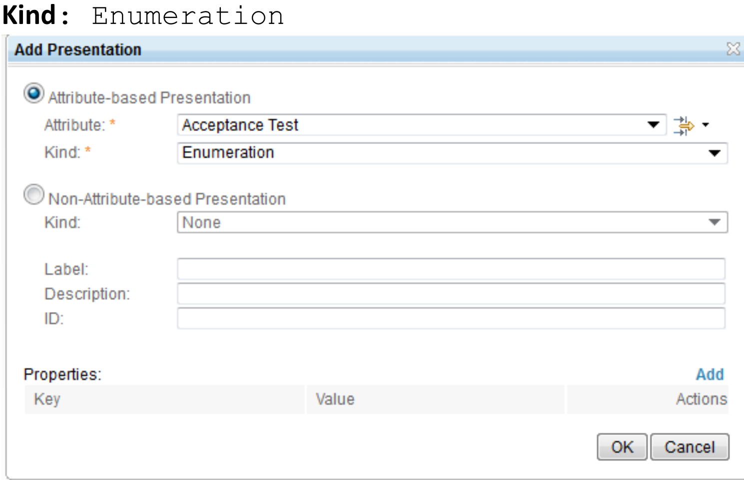


31. Select the *Done Criteria* tab and then the **+ Add Section** to add a section:

Title: `Checklist`
Slot: `Left`
Create Section ID: `com.ibm.team.workitem.section.checklist`



32. In the new **Checklist** section, click the **+** to add an attribute:
Attribute: `Acceptance Test`
Kind: `Enumeration`

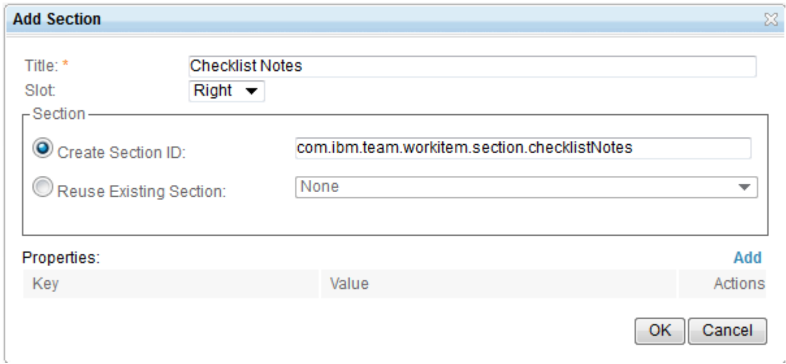


33. Repeat this process to add *Documentation, Performance Test,* and *UX Design.*

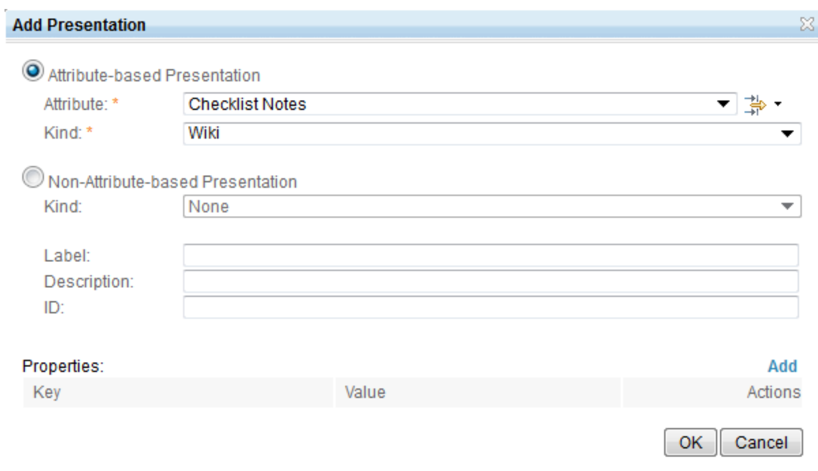
34. Click the **+ Add Section** to add another section:

Title: `Checklist Notes`

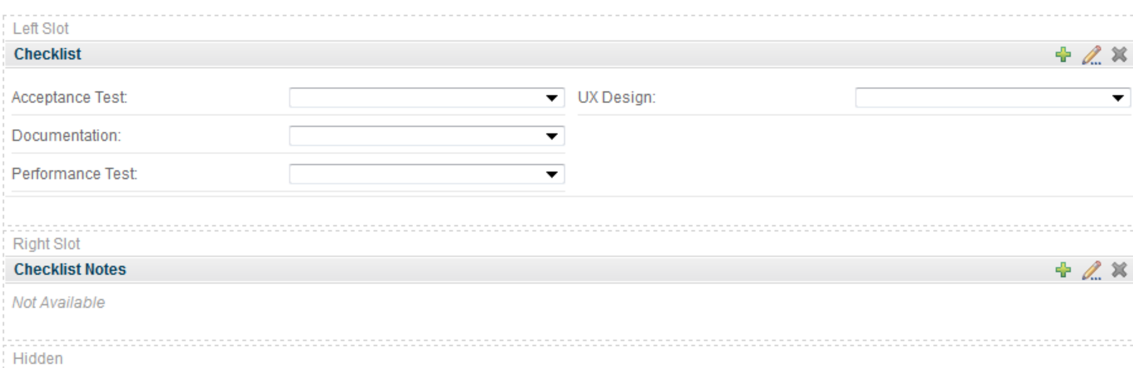
Slot : `Right`
Create Section ID : `com.ibm.team.workitem.section.checklistNotes`



35. In the new **Checklist Notes** section, click the **+** to add an attribute:
Attribute : `Checklist Notes`
Kind : `Wiki`

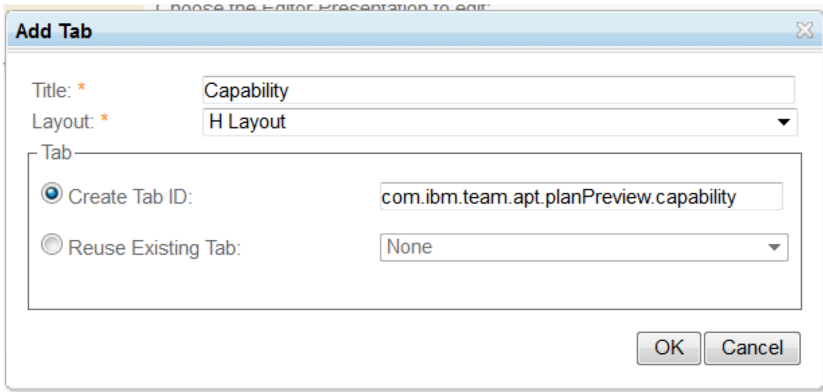


36. Your **Done Criteria** tab should look like this:



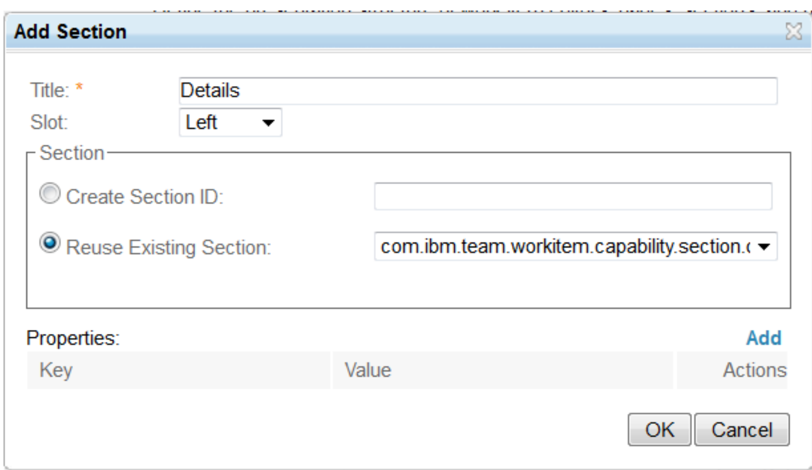
37. Save your changes.
38. Select the *com.ibm.team.apt.planPreview* editor presentation.
39. Click the ✚ to add a new tab for *Capability*.
40. Specify these details:

    Title: `Capability`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.capability`



41. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.capability.section.details`



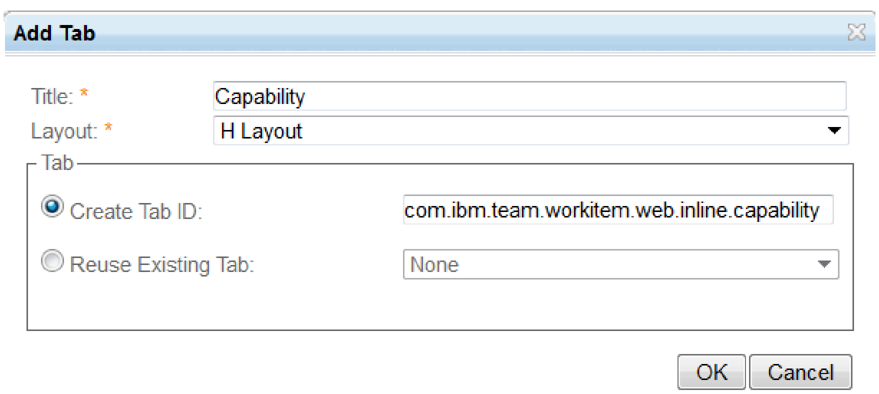
    Title: `Quick Information`
    Slot: `Right`
    Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
    Key: `noHeader`, **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

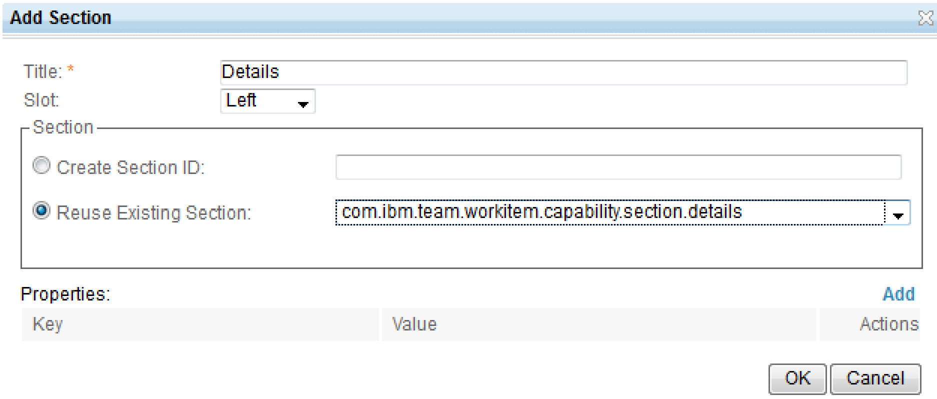
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

42. Save your changes.
43. Select the *com.ibm.team.workitem.web.inline* editor presentation.
44. Click the ✚ to add a new tab for *Capability.*
45. Specify these details:
    Title: `Capability`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.workitem.web.inline.capability`



46. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.capability.section.details`



Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

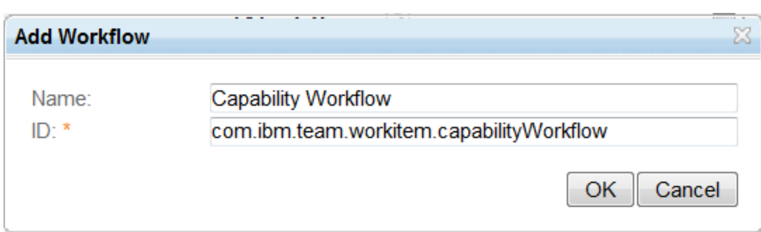
Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

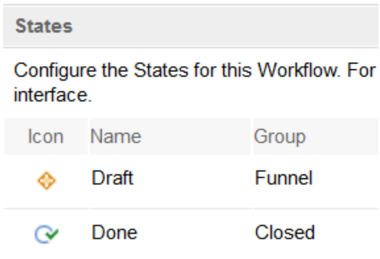
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

47. Save your changes.
48. Click **Workflows** and then **Add…** to create a new Capability workflow.
49. Specify these details:

Name: `Capability Workflow`
ID: `com.ibm.team.workitem.capabilityWorkflow`

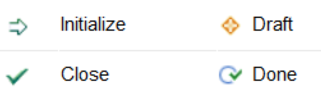


50. Click OK. Ignore the error about no start action…
51. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:

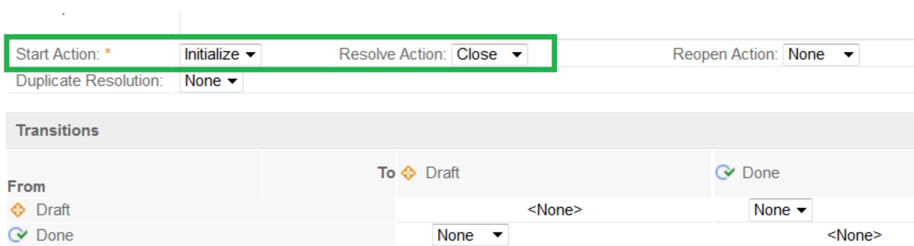


If you don't have all of these specific icons, choose something you have that makes sense.

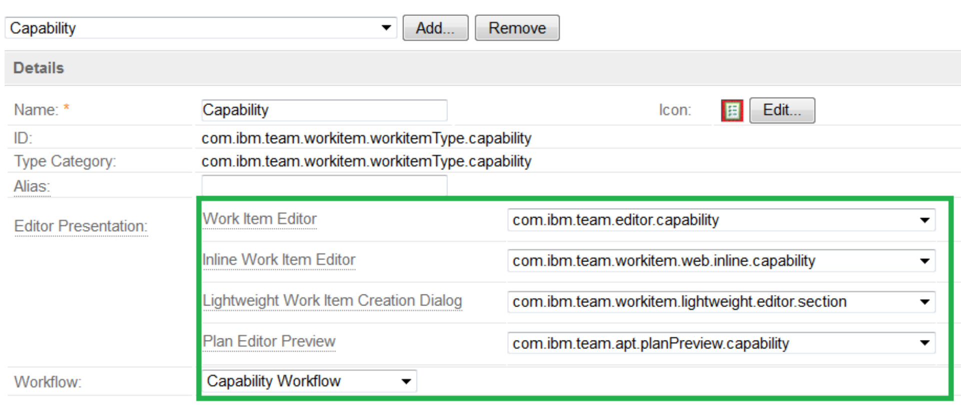
52. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.



53. Specify the **Start Action** and **Resolve Action** in the **Transitions** section.



54. Select **Types and Attributes**.
55. Select *Capability*.
56. Set the **Editors** and **Workflow** as shown below:

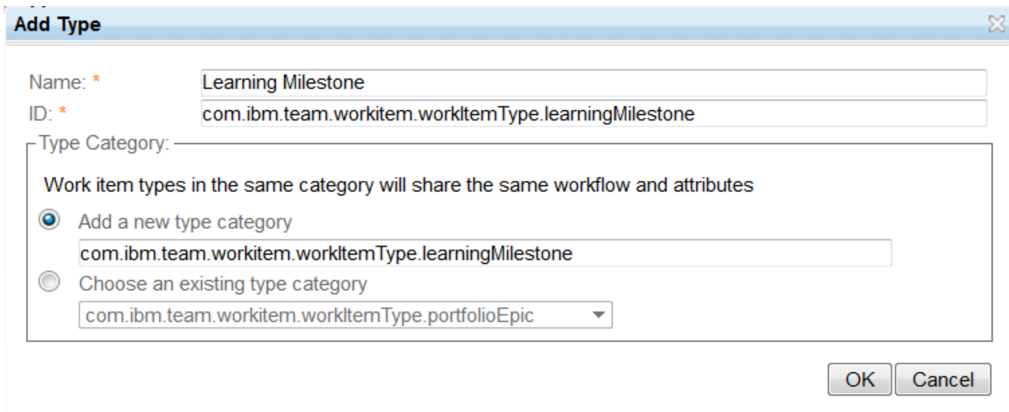


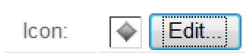
57. Save your changes.

LEARNING MILESTONE

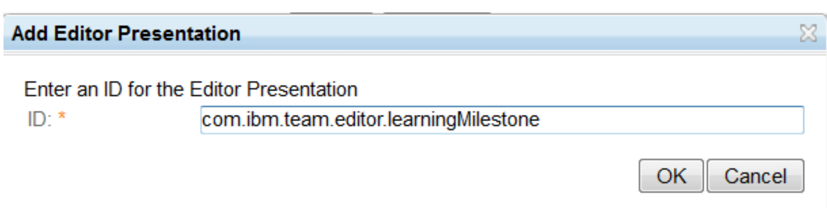
1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

   Name: `Learning Milestone`
   ID: `com.ibm.team.workitem.workItemType.learningMilestone`
   Add a new type category:
   `com.ibm.team.workitem.workItemType.learningMilestone`

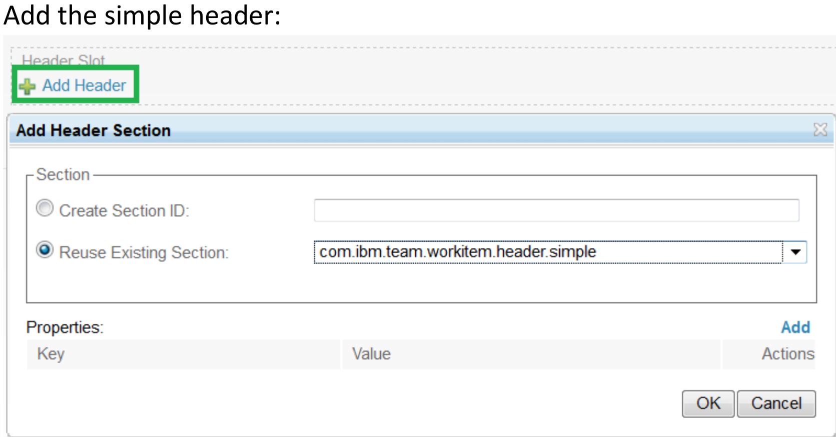


4. Click OK.
5. Choose an icon: 

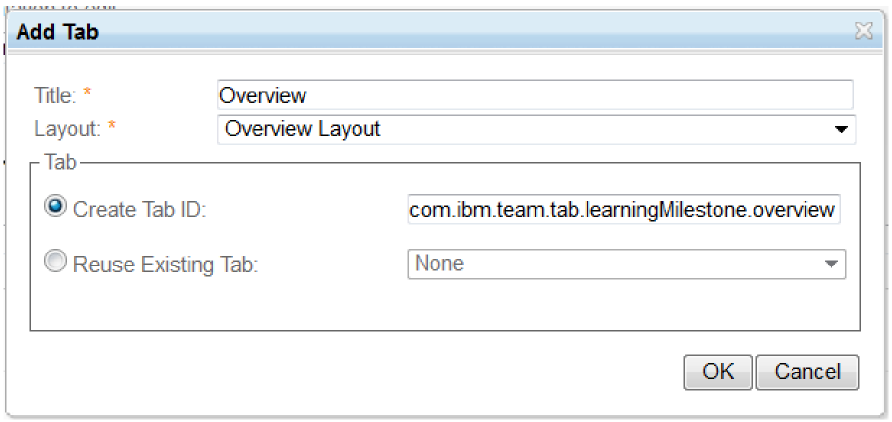
6. Select **Editor Presentations**.
7. Click **Add…** to create a new `com.ibm.team.editor.learningMilestone` editor presentation:



8. Add the simple header:



9. Add the *Overview* tab by clicking the + to the right of **Add Section**.
10. Specify these details:
    Title: `Overview`
    Layout: `Overview Layout`
    Create Tab ID : `com.ibm.team.tab.learningMilestone.overview`



11. Click the + under the new *Overview* section to add tabs for *Success Criteria, Links, Approvals,* and *History,* specifying the details provided below for each section:

    Title: `Success Criteria`
    Layout: `Custom Attributes Layout`
    Reuse Existing Tab: `com.ibm.team.tab.successCriteria`

    Title: :`Links`
    Layout: `Links Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

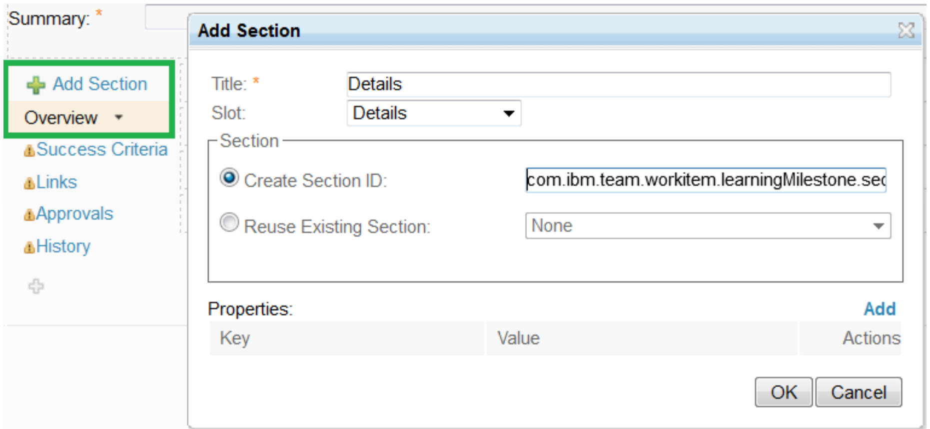
    Title: `Approvals`
    Layout: `Approvals Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.approvals`

    Title: `History`
    Layout: `History Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

12. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary***,** specifying the details provided below for each section:

    Title: `Details`

Slot: `Details`
Create Section ID: `com.ibm.team.workitem.learningMilestone.section.details`

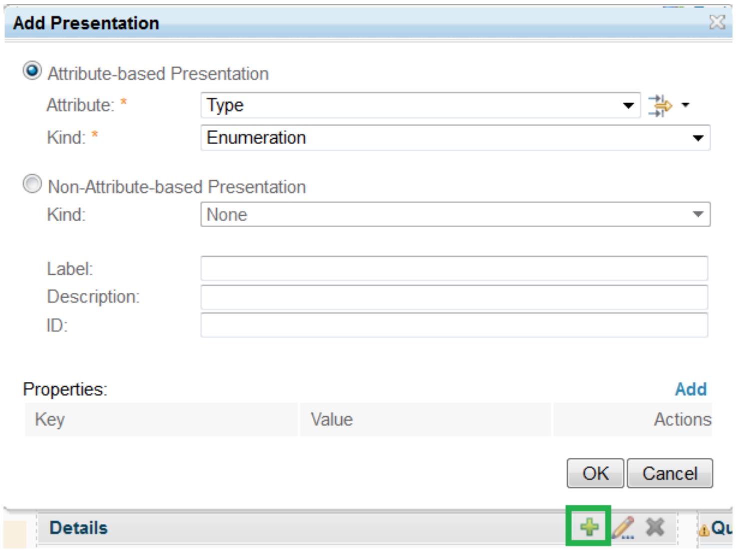


Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Description`
Slot: `Description`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

13. Save your changes.
14. In the **Details** section of the *Overview* tab, click the **+** to add the following attributes:
Attribute: `Type`
Kind: `Enumeration`



Non-Attribute-based Presentation: `Static Rich Text`
Rich Text: `Type Description` (with URL link: http://ibm.biz/Bd4xhH)

Attribute: `Filed Against`
Kind: `Category`

Non-Attribute-based Presentation: `Team and Project Area`

Attribute: `Creation Date`
Kind: `Timestamp`

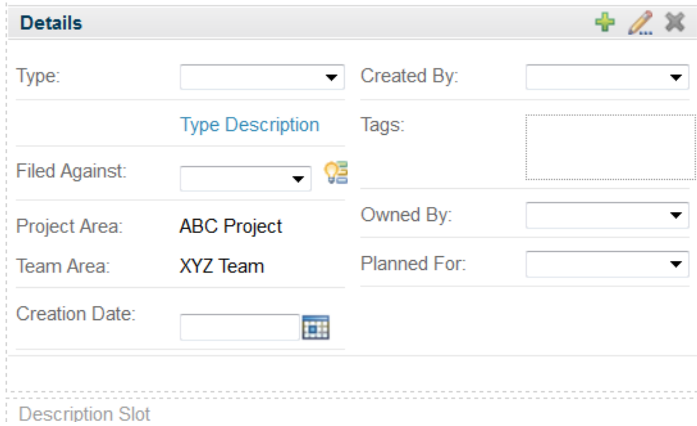
Attribute: `Created By`
Kind: `Contributor`

Attribute: `Tags`
Kind: `Tags`

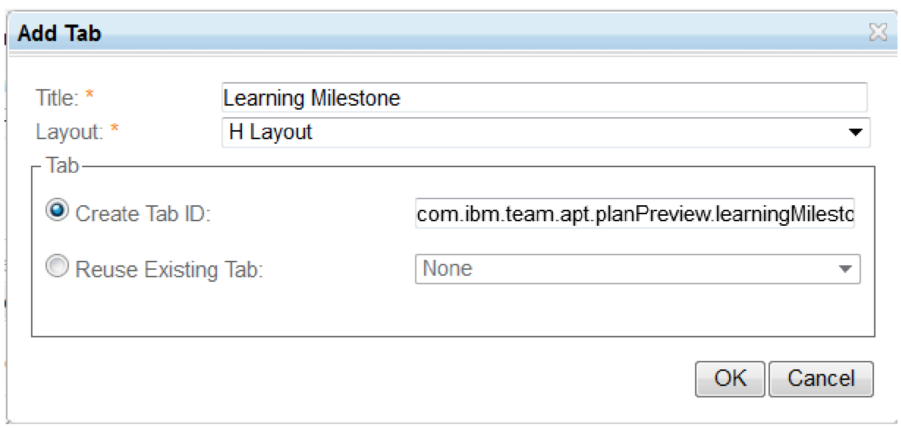
Attribute: `Owned By`
Kind: `Contributor`

Attribute: `Planned For`
Kind: `Iteration`

Your presentation should look like this:

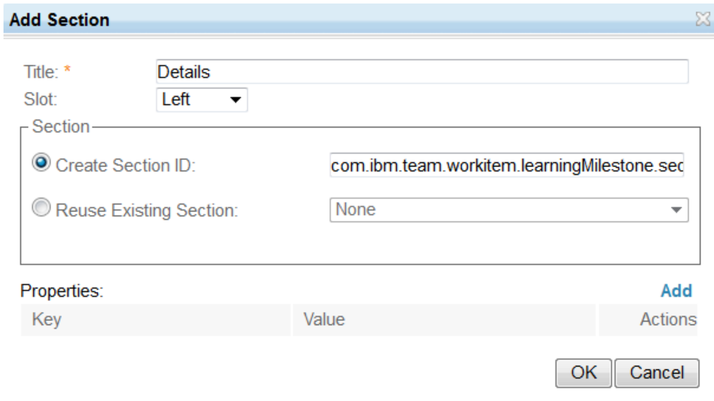


15. Save your changes.
16. Select the *com.ibm.team.apt.planPreview* editor presentation.
17. Click the to add a new tab for *Learning Milestone.*
18. Specify these details:
    Title: `Learning Milestone`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.learningMilestone`



19. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section:
    `com.ibm.team.workitem.learningMilestone.section.details`



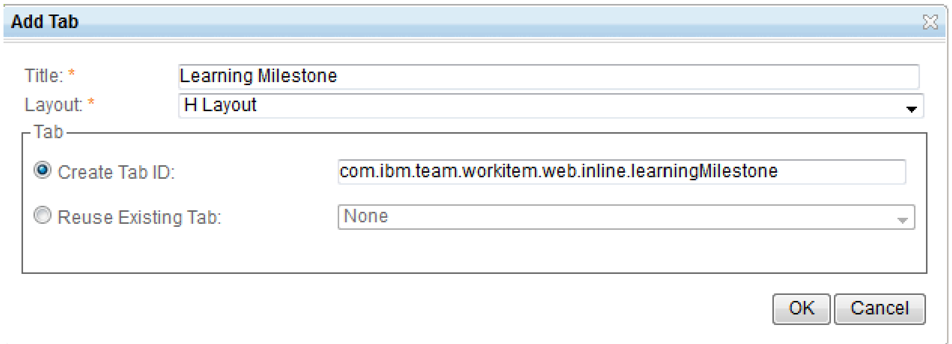
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

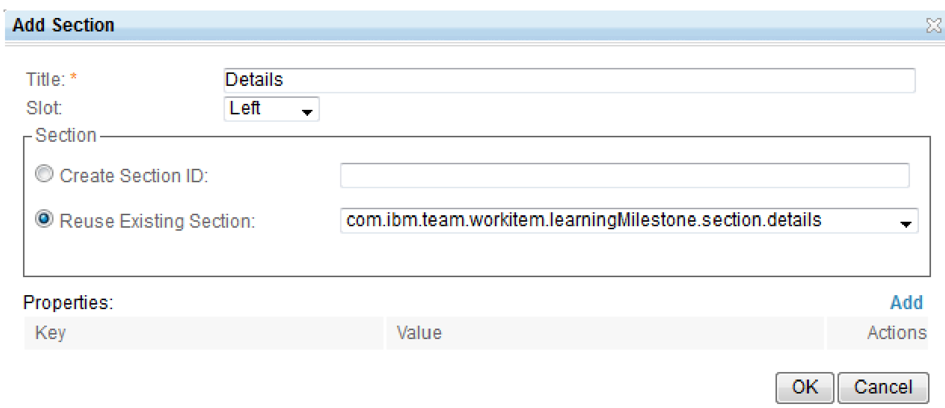
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

20. Save your changes.
21. Select the *com.ibm.team.workitem.web.inline* editor presentation.
22. Click the ✚ to add a new tab for *Learning Milestone.*
23. Specify these details:
    Title: `Learning Milestone`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.workitem.web.inline.learningMilestone`



24. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section:
`com.ibm.team.workitem.learningMilestone.section.details`



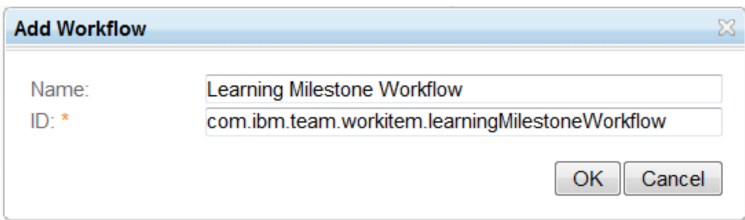
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader,` **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

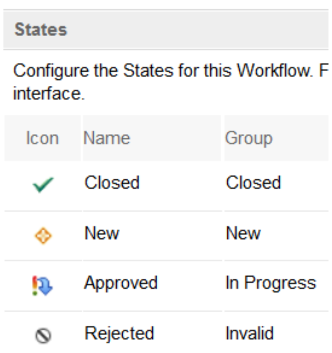
Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded,` **Value:** `false`

Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

25. Save your changes.
26. Click **Workflows** and then **Add…** to create a new Milestone workflow.
27. Specify the **Name** and **ID**: `Learning Milestone Workflow`, `com.ibm.team.workitem.learningMilestoneWorkflow`

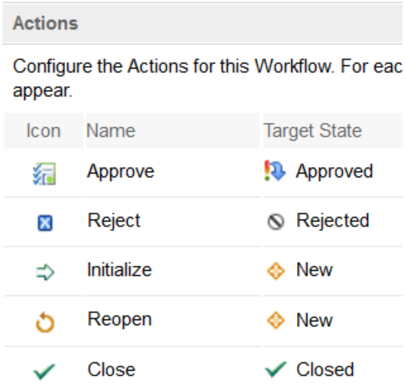


28. Click OK. Ignore the error about no start action… we're getting there!
29. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:

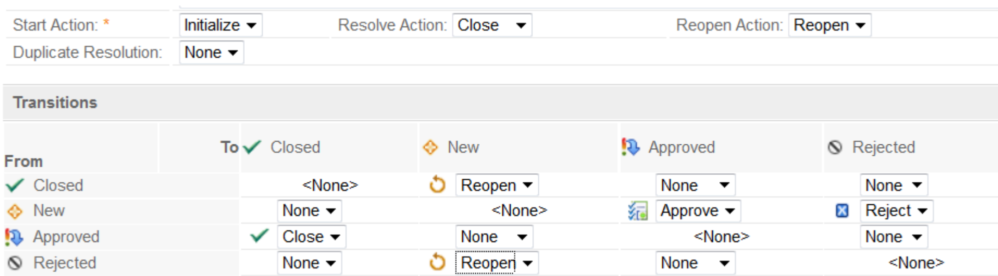


If you don't have all of these specific icons, choose something you have that makes sense.

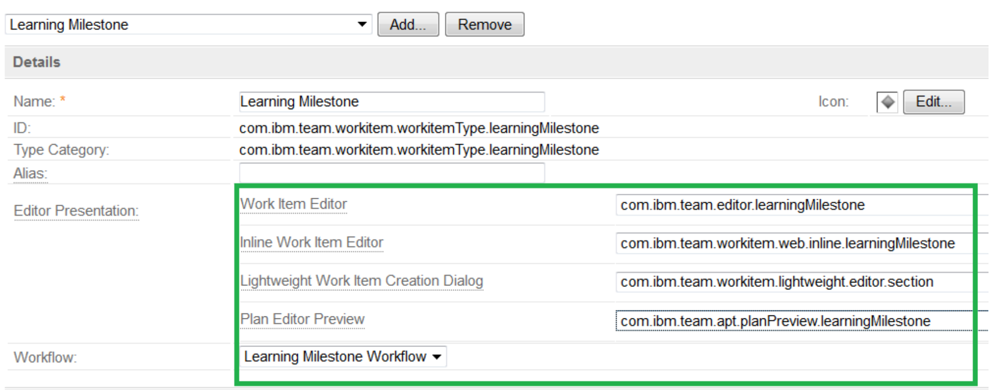
30. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.



31. Specify the **Start Action**, **Resolve Action**, **Reopen Action** and these **Transitions** in the **Transitions** section.



32. Select **Types and Attributes**.
33. Select *Learning Milestone*.
34. Set the **Editors** and **Workflow** as shown below:

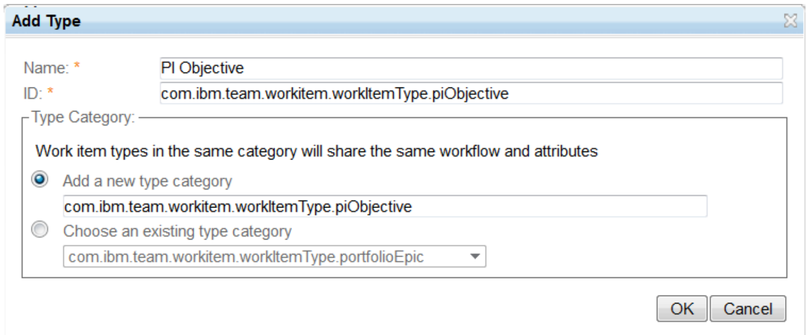


35. Save your changes.

PI OBJECTIVE

1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

Name: `PI Objective`
ID: `com.ibm.team.workitem.workItemType.piObjective`
Add a new type category: `com.ibm.team.workitem.workItemType.piObjective`

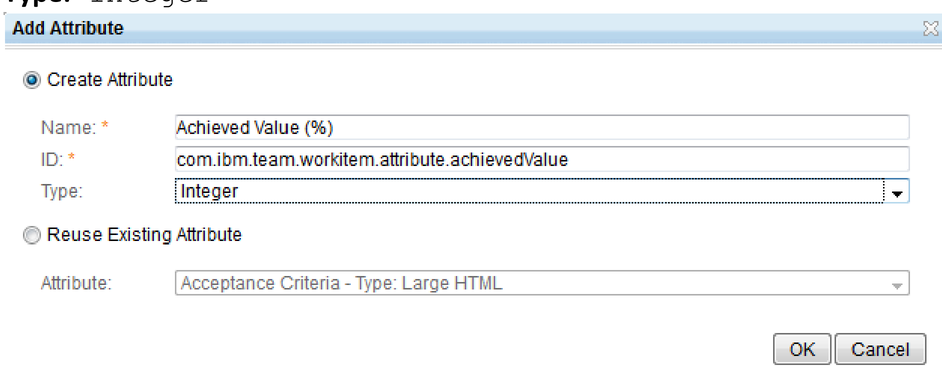


Note: *You can reference your **My SAFe V4.0 Program** project area when specifying the PI Objective work item to view the attributes, enumerations and editors.*

4. Click OK.
5. Choose an icon: 

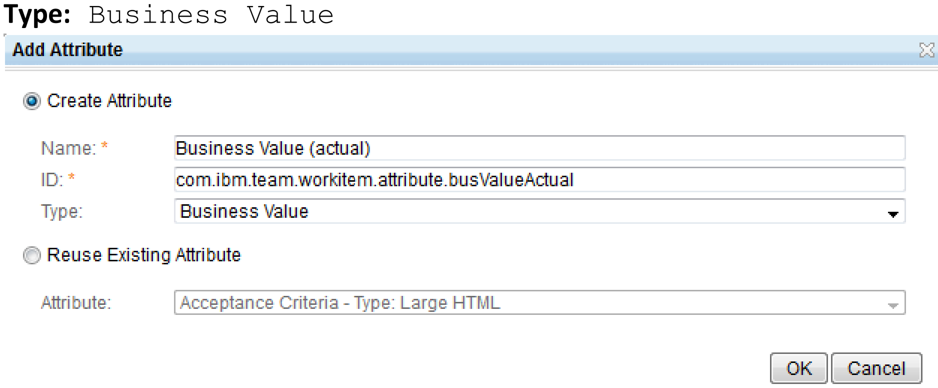
6. Scroll down to the **Attributes** section and click **Add...** to add an *Achieved Value (%)* attribute.
7. Select the **Create Attribute** radio button and specify these details:

Name: `Achieved Value (%)`
ID: `com.ibm.team.workitem.attribute.achievedValue`
Type: `Integer`



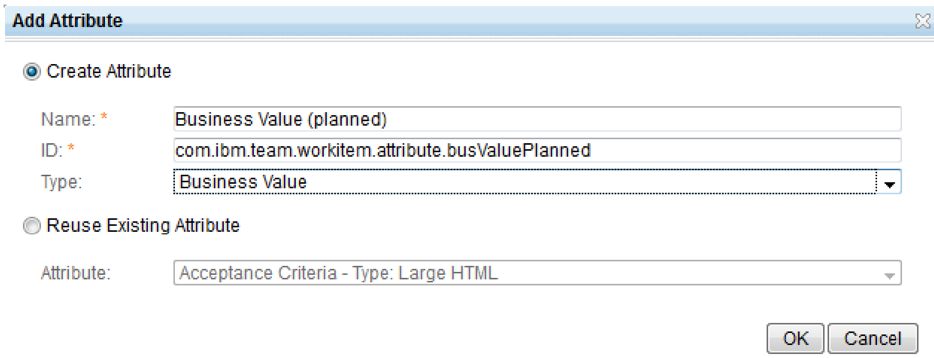
8. Click **Add...** to add the *Business Value (actual)* attribute.
9. Select the **Create Attribute** radio button and specify these details:

Name: `Business Value (actual)`
ID: `com.ibm.team.workitem.attribute.busValueActual`
Type: `Business Value`



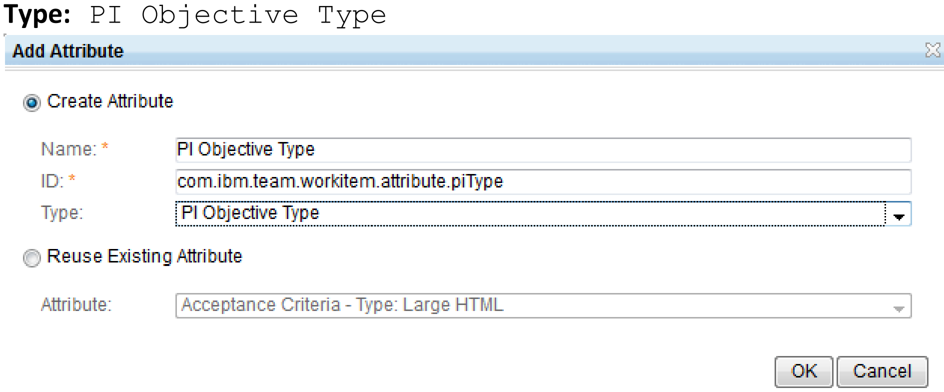
10. Click **Add...** to add the *Business Value (planned)* attribute.
11. Select the **Create Attribute** radio button and specify these details:

    Name: `Business Value (planned)`
    ID: `com.ibm.team.workitem.attribute.busValuePlanned`
    Type: `Business Value`

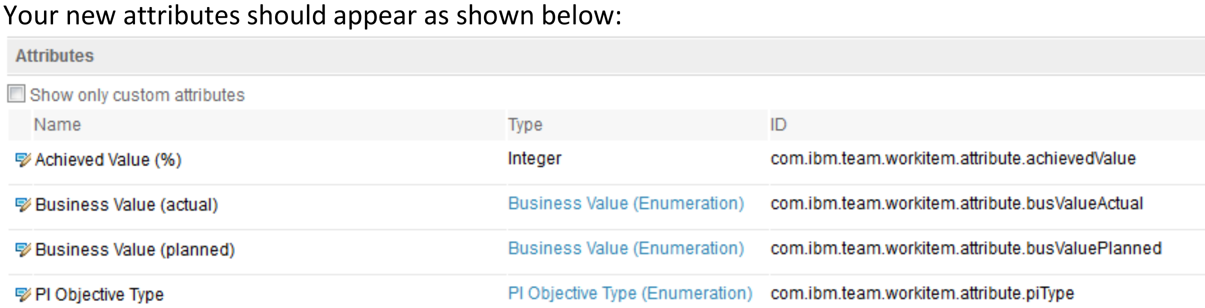


12. Click **Add...** to add the *PI Objective Type* attribute.
13. Select the **Create Attribute** radio button and specify these details:

    Name: `PI Objective Type`
    ID: `com.ibm.team.workitem.attribute.piType`
    Type: `PI Objective Type`



14. Your new attributes should appear as shown below:

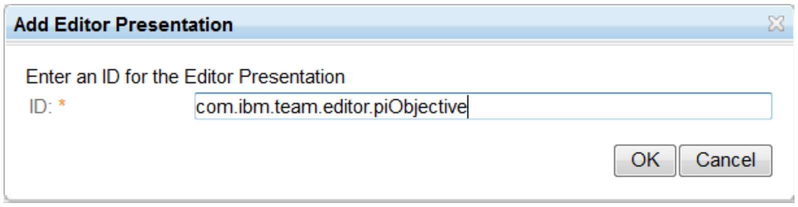


Attributes

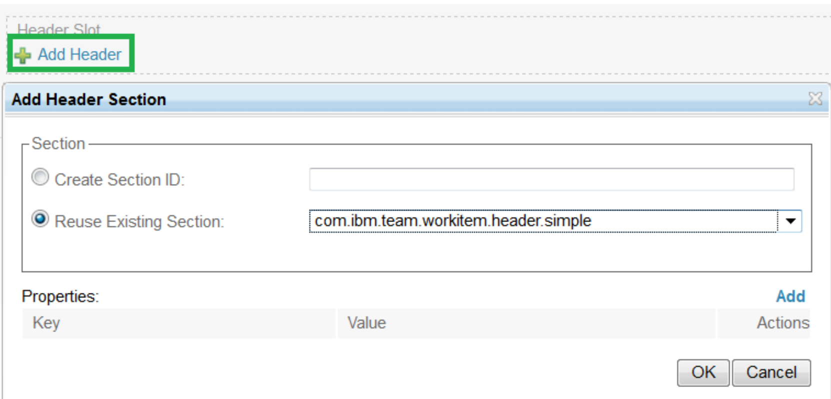
☐ Show only custom attributes

Name	Type	ID
Achieved Value (%)	Integer	com.ibm.team.workitem.attribute.achievedValue
Business Value (actual)	Business Value (Enumeration)	com.ibm.team.workitem.attribute.busValueActual
Business Value (planned)	Business Value (Enumeration)	com.ibm.team.workitem.attribute.busValuePlanned
PI Objective Type	PI Objective Type (Enumeration)	com.ibm.team.workitem.attribute.piType

15. Save your changes.
16. Select **Editor Presentations**.
17. Click **Add...** to create a new `com.ibm.team.editor.piObjective` editor presentation:

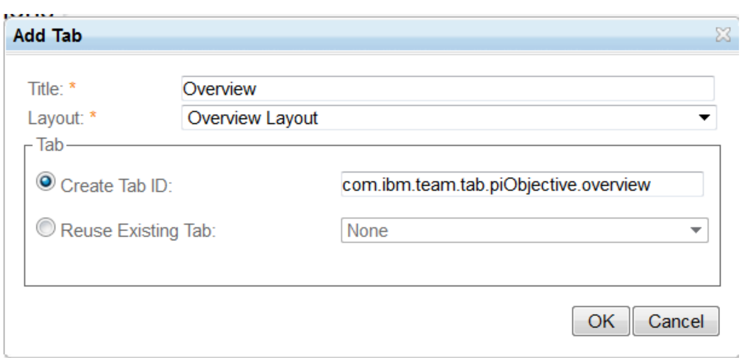


18. Add the simple header:



19. Add the *Overview* tab by clicking the + to the right of **Add Section**.
20. Specify these details:

    Title: `Overview`
    Layout: `Overview Layout`
    Create Tab ID: `com.ibm.team.tab.piObjective.overview`



21. Click the + under the new *Overview* section to add tabs for *Links, Approvals,* and *History,* specifying the details provided below for each section:

    Title: :`Links`
    Layout: `Links Layout`
    Resuse Existing Tab: `com.ibm.team.workitem.tab.links`

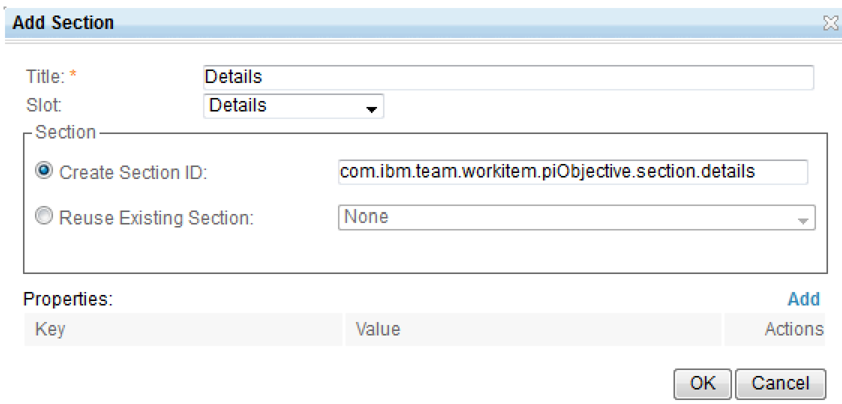
    Title: `Approvals`
    Layout: `Approvals Layout`

Resuse Existing Tab : com.ibm.team.workitem.tab.approvals

Title: History
Layout: History Layout
Resuse Existing Tab : com.ibm.team.workitem.tab.history

22. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary***,** specifying the details provided below for each section:

    Title: Details
    Slot: Details
    Create Section ID: com.ibm.team.workitem.piObjective.section.details

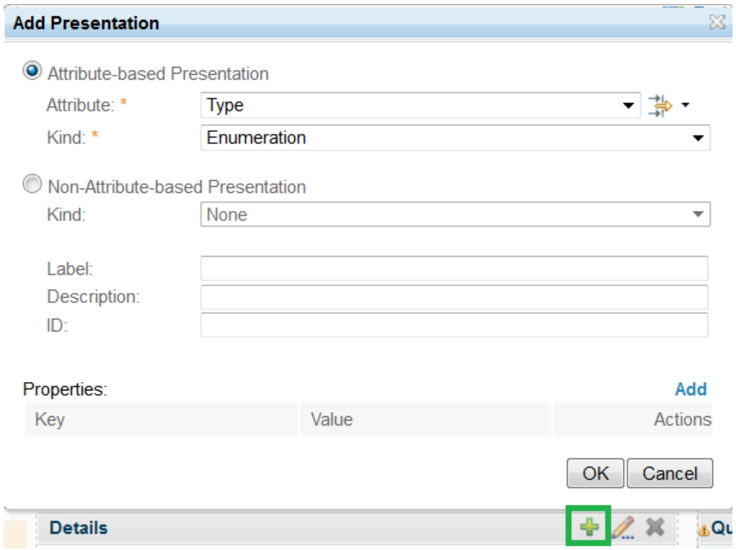
    

    Title: Quick Information
    Slot: Quick Information
    Reuse Existing Section: com.ibm.team.workitem.section.quickinformation

    Title: Description
    Slot: Description
    Reuse Existing Section: com.ibm.team.workitem.section.description

    Title: Discussion
    Slot: Discussion
    Reuse Existing Section: com.ibm.team.workitem.section.discussion

23. Save your changes.
24. In the **Details** section of the *Overview* tab, click the + to add the following attributes:
    Attribute: Type
    Kind: Enumeration



Non-Attribute-based Presentation: `Static Rich Text`
Rich Text: `Type Description` (with URL link: http://ibm.biz/Bd4xhj)

Attribute: `PI Objective Type`
Kind: `Radio Group`

Attribute: `Filed Against`
Kind: `Category`

Attribute: `Tags`
Kind: `Tags`

Attribute: `Owned By`
Kind: `Contributor`

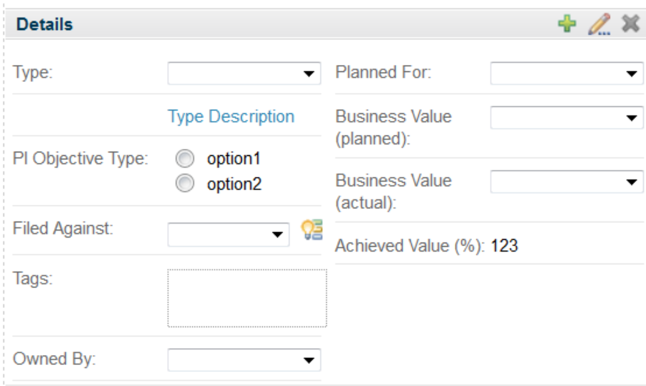
Attribute: `Planned For`
Kind: `Iteration`

Attribute: `Business Value (planned)`
Kind: `Enumeration`

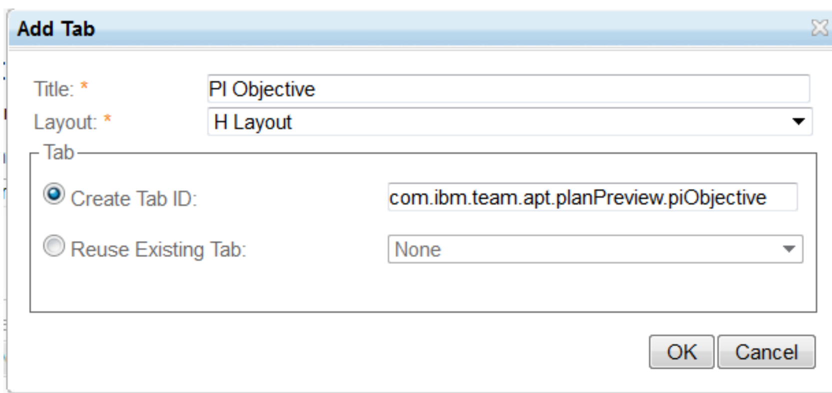
Attribute: `Business Value (actual)`
Kind: `Enumeration`

Attribute: `Achieved value (%)`
Kind: `Integer`

Your presentation should look like this:

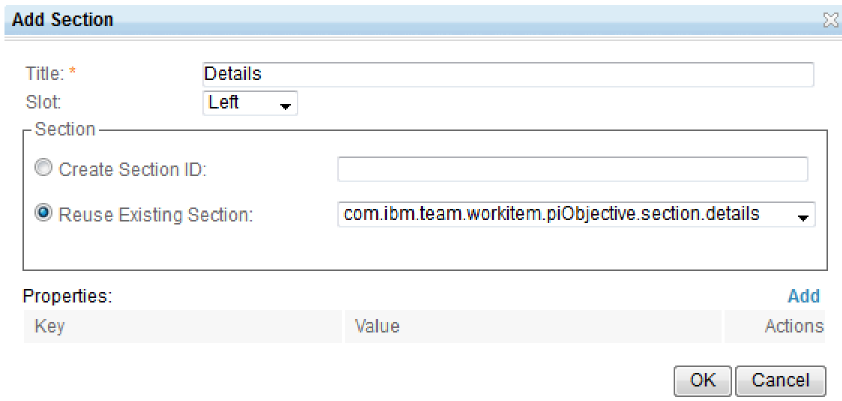


25. Save your changes.
26. Select the *com.ibm.team.apt.planPreview* editor presentation.
27. Click the to add a new tab for *PI Objective.*
28. Specify these details:
    Title: `PI Objective`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.piObjective`



29. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.piObjective.section.details`



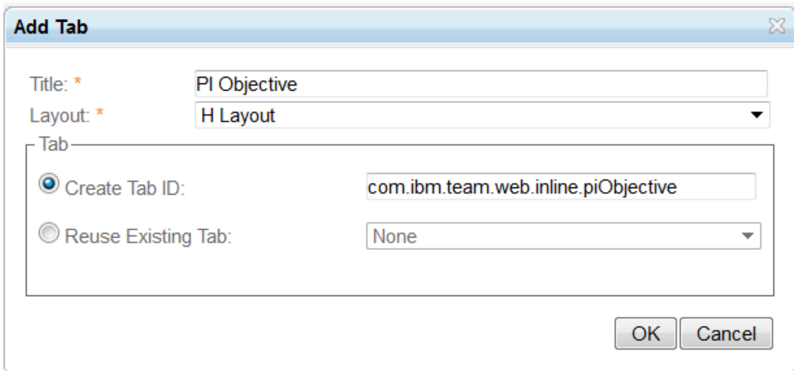
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

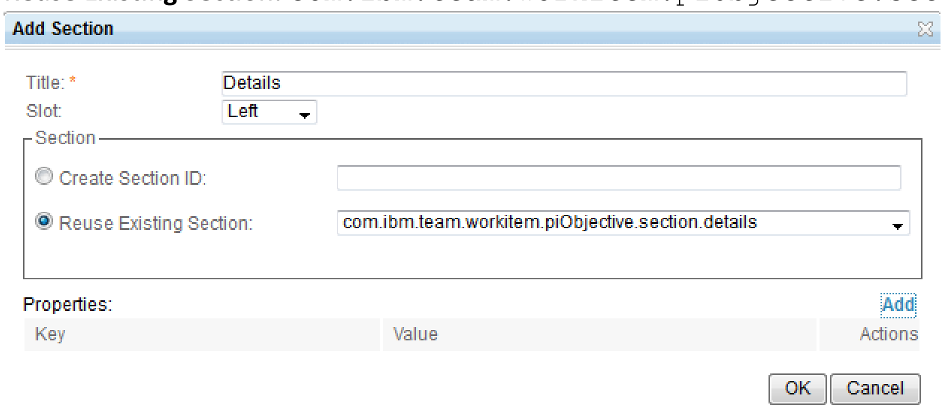
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

30. Save your changes.
31. Select the *com.ibm.team.workitem.web.inline* editor presentation.
32. Click the + to add a new tab for *PI Objective.*
33. Specify these details:
    Title: `PI Objective`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.web.inline.piObjective`



34. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section: `com.ibm.team.workitem.piObjective.section.details`



Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

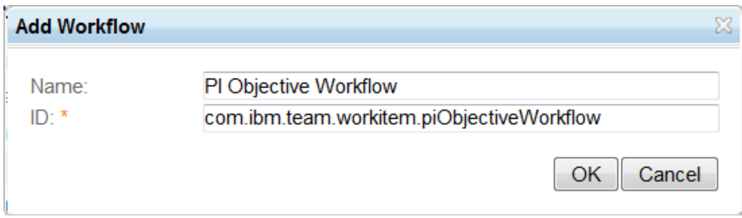
Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

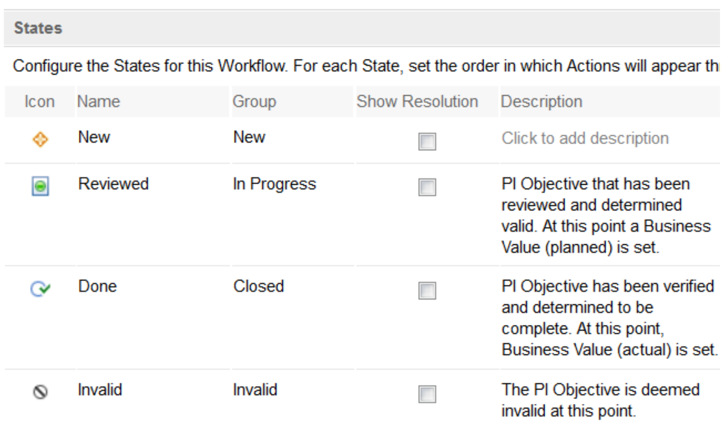
Title: `Summary`
Slot: `Top`

Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

35. Save your changes.
36. Click **Workflows** and then **Add…** to create a new PI Objective workflow.
37. Specify the **Name** and **ID**: `PI Objective Workflow`, `com.ibm.team.workitem.piObjectiveWorkflow`



38. Click OK. Ignore the error about no start action… we're getting there!
39. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:



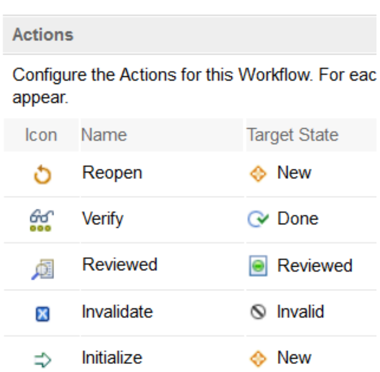
States

Configure the States for this Workflow. For each State, set the order in which Actions will appear th

Icon	Name	Group	Show Resolution	Description
	New	New		Click to add description
	Reviewed	In Progress		PI Objective that has been reviewed and determined valid. At this point a Business Value (planned) is set.
	Done	Closed		PI Objective has been verified and determined to be complete. At this point, Business Value (actual) is set.
	Invalid	Invalid		The PI Objective is deemed invalid at this point.

If you don't have all of these specific icons, choose something you have that makes sense.

40. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.

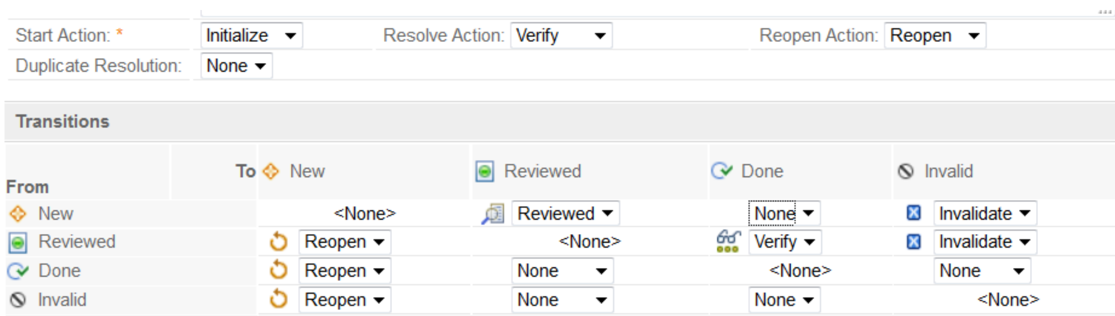


Actions

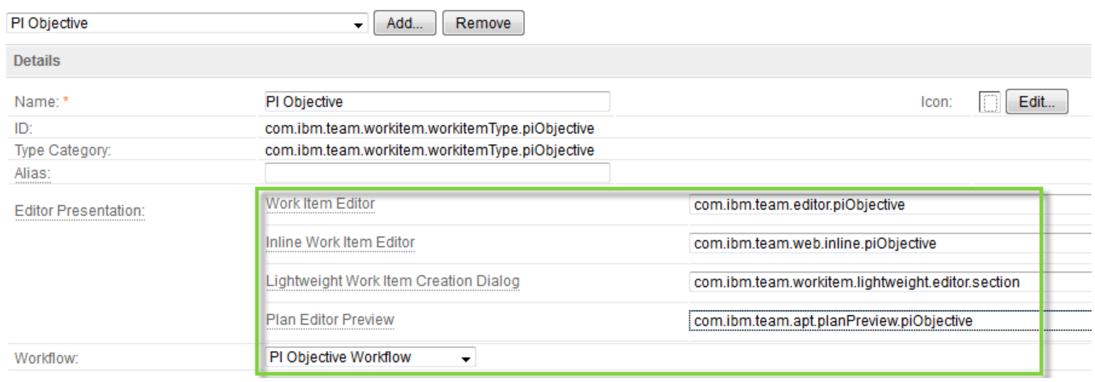
Configure the Actions for this Workflow. For eac appear.

Icon	Name	Target State
	Reopen	New
	Verify	Done
	Reviewed	Reviewed
	Invalidate	Invalid
	Initialize	New

41. Specify the **Start Action**, **Resolve Action**, **Reopen Action** and these **Transitions** in the **Transitions** section.



42. Select **Types and Attributes**.
43. Select *PI Objective*.
44. Set the **Editors** and **Workflow** as shown below:

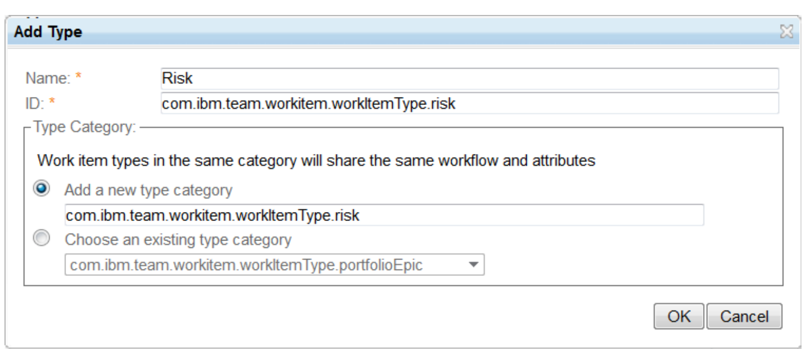


45. Save your changes.

RISK

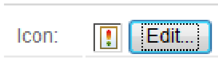
1. Select **Types and Attributes**.
2. Select **Add...** to add a new Work Item Type.
3. Specify these details:

   Name: `Risk`
   ID: `com.ibm.team.workitem.workItemType.risk`
   Add a new type category: `com.ibm.team.workitem.workItemType.risk`



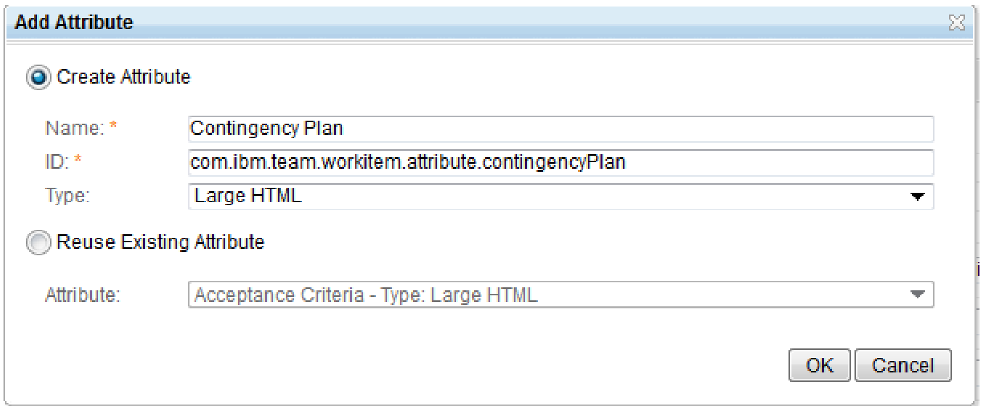
***Note:** You can reference your **My SAFe V4.0 Program** project area when specifying the Risk work item to view the attributes, enumerations and editors.*

4. Click OK.

5. Choose an icon: 

6. Scroll down to the **Attributes** section and click **Add...** to add a *Contingency Plan* attribute.
7. Select the **Create Attribute** radio button and specify these details:

   Name: `Contingency Plan`
   ID: `com.ibm.team.workitem.attribute.contingencyPlan`
   Type: `Large HTML`



8. Repeat these steps to create the rest of the attributes with the specified details:

   Name: `Exposure (%)`
   ID: `com.ibm.team.workitem.attribute.exposure`
   Type: `Long`

   Name: `Identification Date`
   ID: `com.ibm.team.workitem.attribute.identificationDate`
   Type: `Timestamp`

   Name: `Impact`
   ID: `com.ibm.team.workitem.attribute.impact`
   Type: `Impact`

   Name: `Mitigation Plan`
   ID: `com.ibm.team.workitem.attribute.mitigationPlan`
   Type: `Large HTML`

   Name: `Occurrence Date`
   ID: `com.ibm.team.workitem.attribute.occurrenceDate`
   Type: `Timestamp`

   Name: `Probability`
   ID: `com.ibm.team.workitem.attribute.probability`

Type: `Probability`

Name: `Risk Category`
ID: `com.ibm.team.workitem.attribute.riskCategory`
Type: `Risk Category`

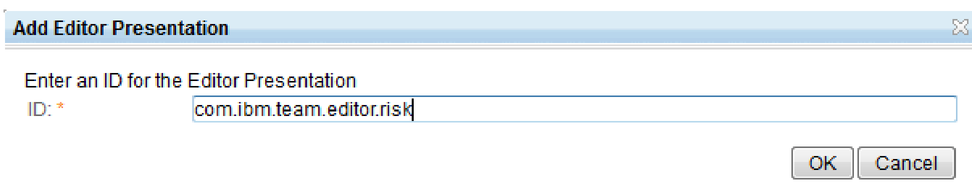
9. Your new attributes should appear as shown below:

Attributes

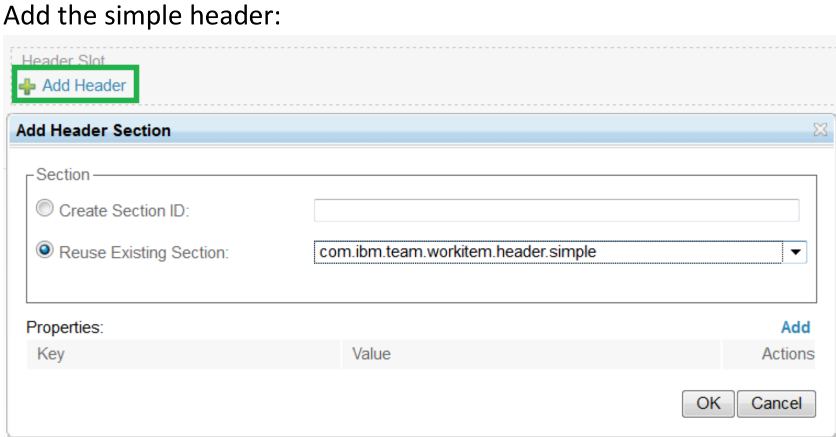
☑ Show only custom attributes

Name	Type	ID
Contingency Plan	Large HTML	com.ibm.team.workitem.attribute.contingencyPlan
Exposure (%)	Long	com.ibm.team.workitem.attribute.exposure
Identification Date	Timestamp	com.ibm.team.workitem.attribute.identificationDate
Impact	Impact (Enumeration)	com.ibm.team.workitem.attribute.impact
Mitigation Plan	Large HTML	com.ibm.team.workitem.attribute.mitigationPlan
Occurrence Date	Timestamp	com.ibm.team.workitem.attribute.occurrenceDate
Probability	Probability (Enumeration)	com.ibm.team.workitem.attribute.probability
Risk Category	Risk Category (Enumeration)	com.ibm.team.workitem.attribute.riskCategory

10. Save your changes.
11. Select **Editor Presentations**.
12. Click **Add...** to create a new `com.ibm.team.editor.risk` editor presentation:

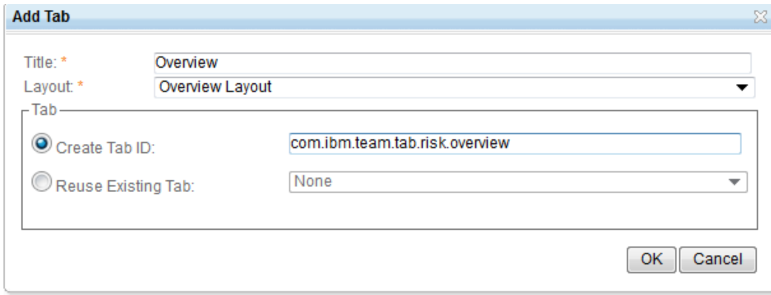


13. Add the simple header:



14. Add the *Overview* tab by clicking the **+** to the right of **Add Section**.
15. Specify these details:
Title: `Overview`
Layout: `Overview Layout`

Create Tab ID : `com.ibm.team.tab.risk.overview`



16. Click the under the new *Overview* section to add tabs for *Risk Planning, Links, Approvals,* and *History,* specifying the details provided below for each section:

    Title: :`Risk Planning`
    Layout: `H Layout`
    Create Tab ID : `com.ibm.team.workitem.tab.riskPlanning`

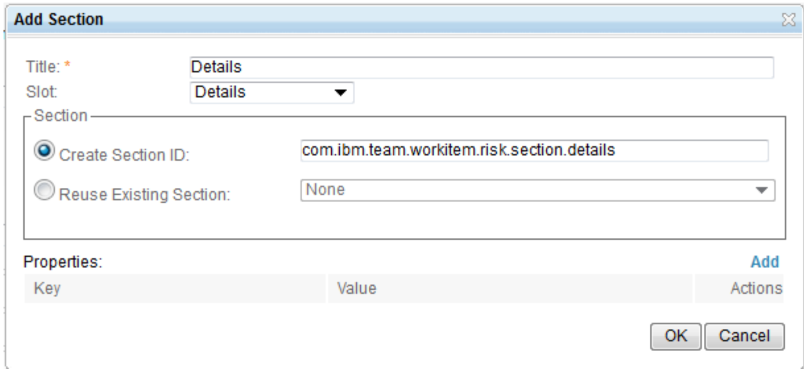
    Title: :`Links`
    Layout: `Links Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

    Title: `Approvals`
    Layout: `Approvals Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.approvals`

    Title: `History`
    Layout: `History Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

17. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary***,** specifying the details provided below for each section:

    Title: `Details`
    Slot: `Details`
    Create Section ID: `com.ibm.team.workitem.risk.section.details`

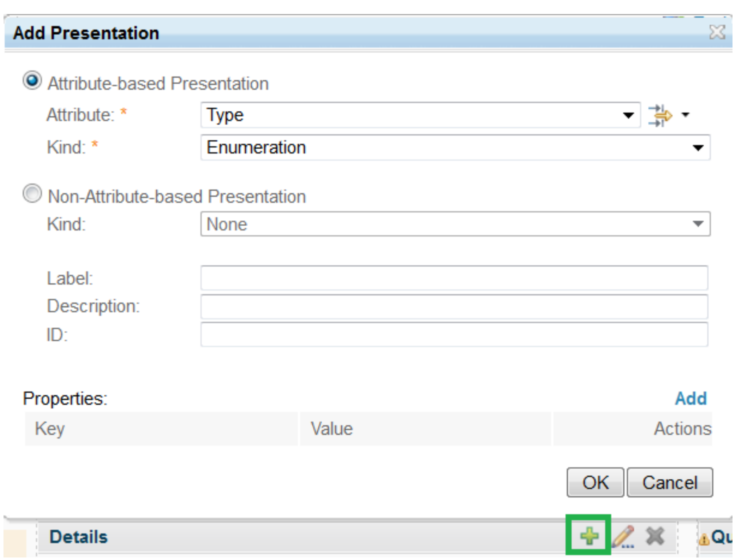


Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Description`
Slot: `Description`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

18. Save your changes.
19. In the **Details** section of the *Overview* tab, click the + to add the following attributes:
    Attribute: `Type`
    Kind: `Enumeration`



Non-Attribute-based Presentation: Static Rich Text
Rich Text: Type Description (with URL link: http://ibm.biz/BdHFKt)

Attribute: Creation Date
Kind: Timestamp

Attribute: Created By
Kind: Contributor

Non-Attribute-based Presentation
Kind: Team and Project Area

Attribute: Filed Against
Kind: Category

Attribute: Tags
Kind: Tags

Attribute: Owned By
Kind: Contributor

Attribute: Priority
Kind: Enumeration

Attribute: Planned For
Kind: Iteration
Label: Identified For

Attribute: Resolution Date
Kind: Timestamp

Attribute: Resolved By
Kind: Contributor

Attribute: Probability
Kind: Enumeration

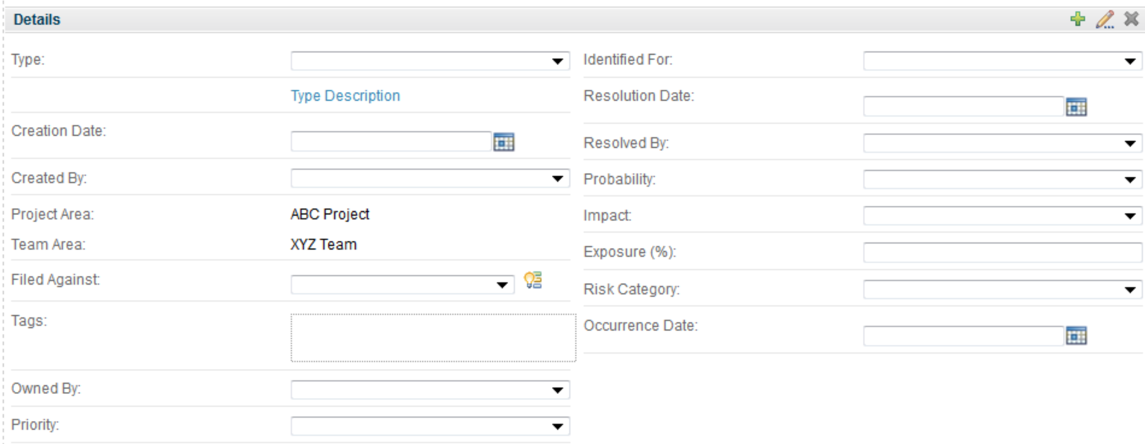
Attribute: Impact
Kind: Enumeration

Attribute: Exposure (%)
Kind: Long

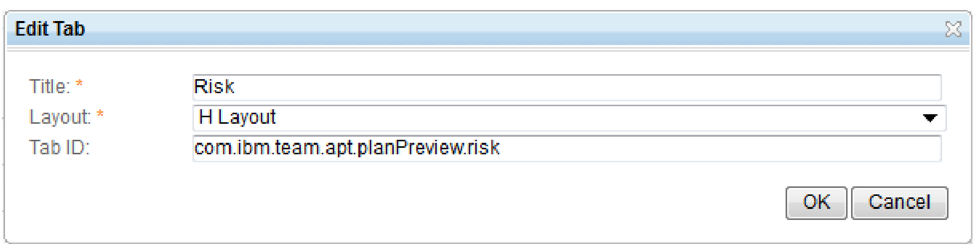
Attribute: `Risk Category`
Kind: `Enumeration`

Attribute: `Occurrence Date`
Kind: `Timestamp`

Your presentation should look like this:

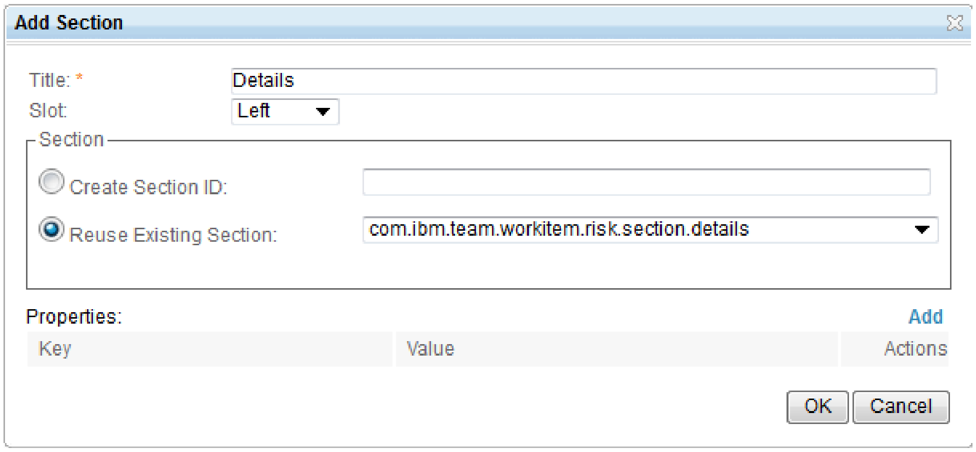


20. Save your changes.
21. Select the *com.ibm.team.apt.planPreview* editor presentation.
22. Click the to add a new tab for *Risk.*
23. Specify these details:
    Title: `Risk`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.risk`



24. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.risk.section.details`



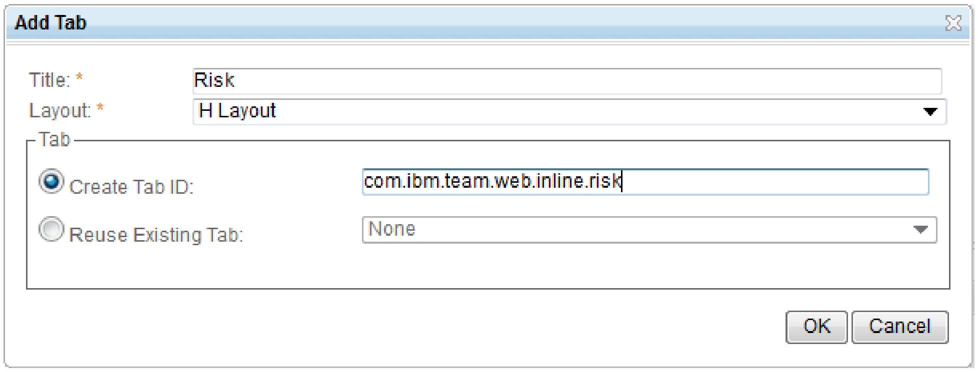
Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader,` **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded,` **Value:** `false`

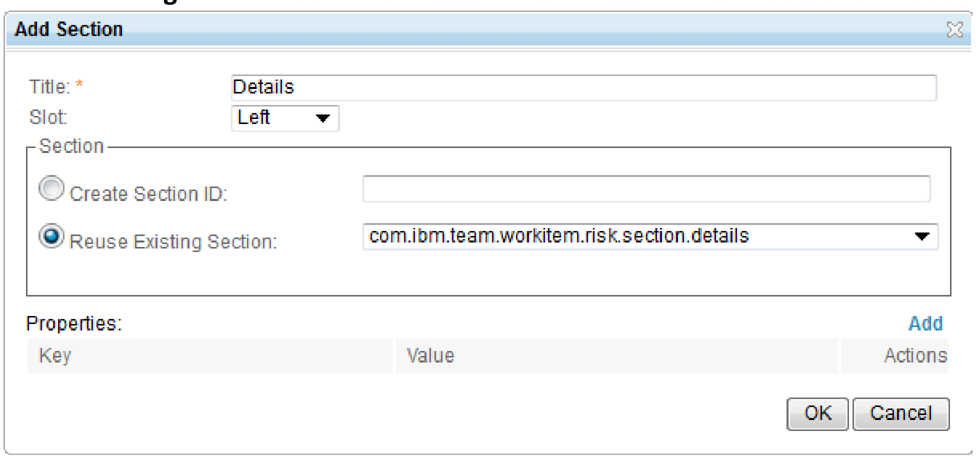
Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader,` **Value:** `true`

25. Save your changes.
26. Select the *com.ibm.team.workitem.web.inline* editor presentation.
27. Click the to add a new tab for *Risk.*
28. Specify these details:
    Title: `Risk`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.web.inline.risk`



29. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section: `com.ibm.team.workitem.risk.section.details`



Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

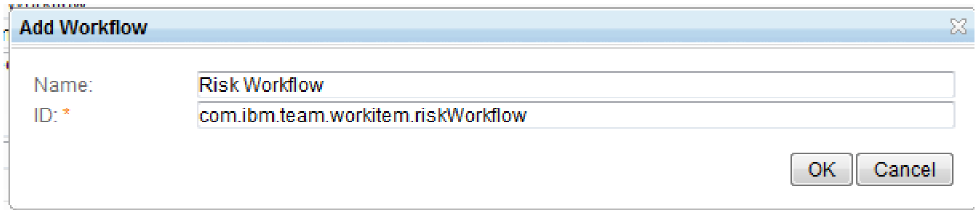
Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

Title: `Summary`

Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

30. Save your changes.
31. Click **Workflows** and then **Add…** to create a new Risk workflow.
32. Specify the **Name** and **ID**: `Risk Workflow`, `com.ibm.team.workitem.riskWorkflow`



33. Click OK. Ignore the error about no start action… we're getting there!
34. Specify these **Resolutions** by clicking the **Add…** option in the **Resolutions** section and adding each one:

Resolutions

Icon	Name
	Avoided
	Transferred/Shared
	Mitigated
	Accepted
	Invalid

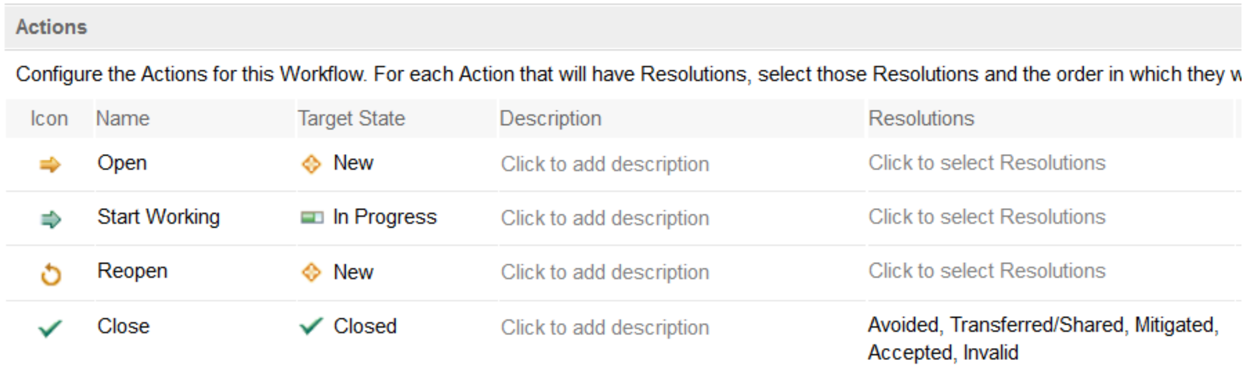
35. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:

States

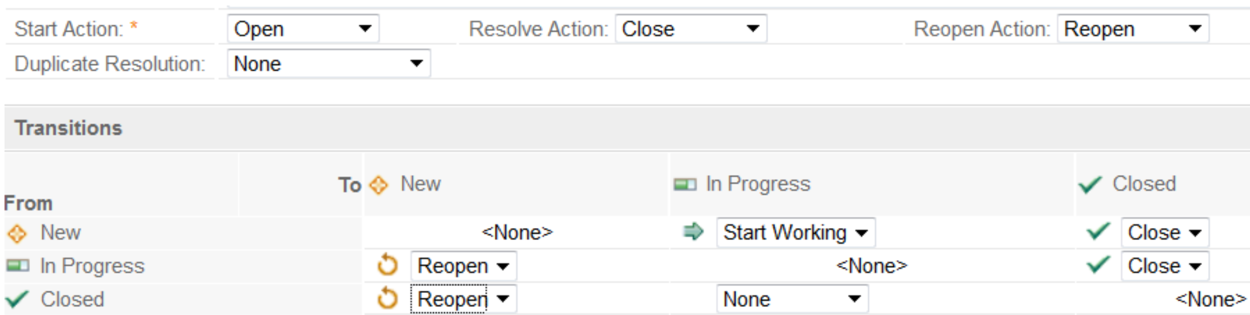
Configure the States for this Workflow. For each State, set the order in which Actions will appear throughout the user interface.

Icon	Name	Group	Show Resolution	Description	Workflow Actions
	New	New	☐	Click to add description	In Progress
	In Progress	In Progress	☐	Click to add description	Close
	Closed	Done	☑	Click to add description	Reopen

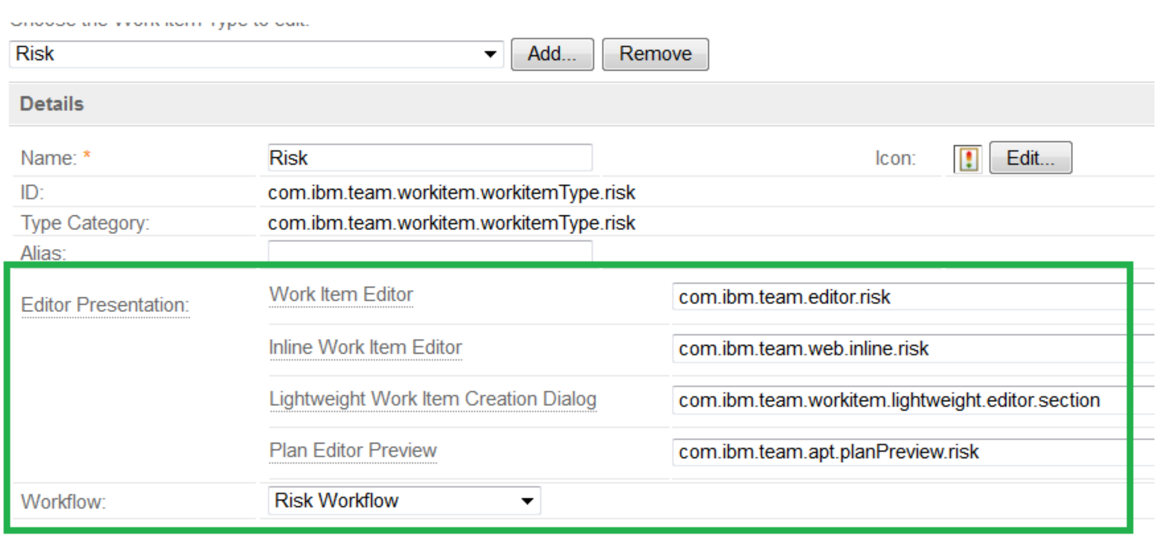
36. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.



37. Specify the **Start Action**, **Resolve Action**, **Reopen Action** and these **Transitions** in the **Transitions** section.



38. Select **Types and Attributes**.
39. Select *Risk*.
40. Set the **Editors** and **Workflow** as shown below:



41. Save your changes.
42. Select **Enumerations**.
43. Select **Epic Type** and then click the **Remove** button to delete it.

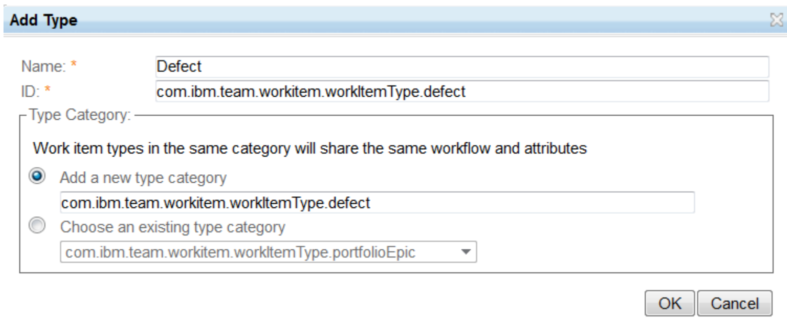
44. Save your changes.

DEFECT

1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

> ***Note:*** *You can reference your* ***My SAFe V4.0 Program*** *project area when specifying the Defect work item to view the attributes, enumerations and editors.*

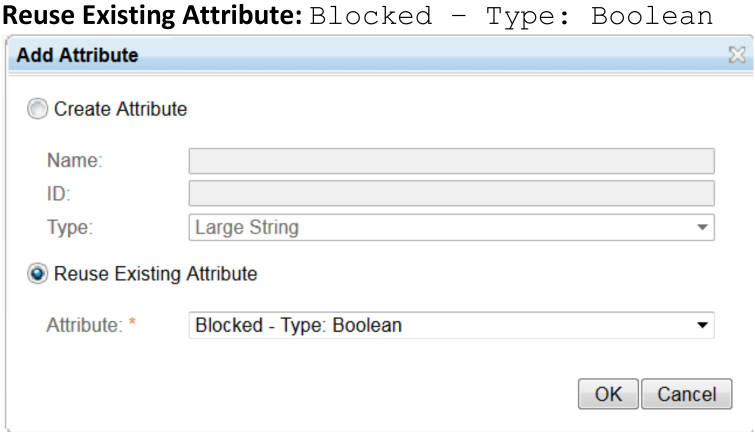
Name: `Defect`
ID: `com.ibm.team.workitem.workItemType.defect`
Add a new type category:
`com.ibm.team.workitem.workItemType.defect`



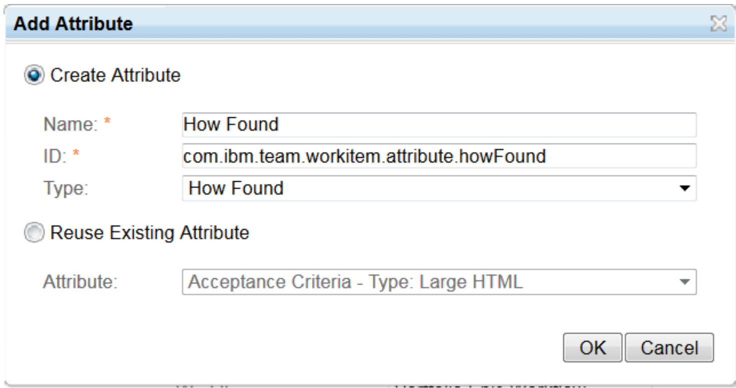
4. Click OK.
5. Choose an icon: 

6. Add values for **Alias:** `defect, bug`
7. Scroll down to the **Attributes** section and click **Add…** to add *Blocked, How Found* and *Reason* attributes:

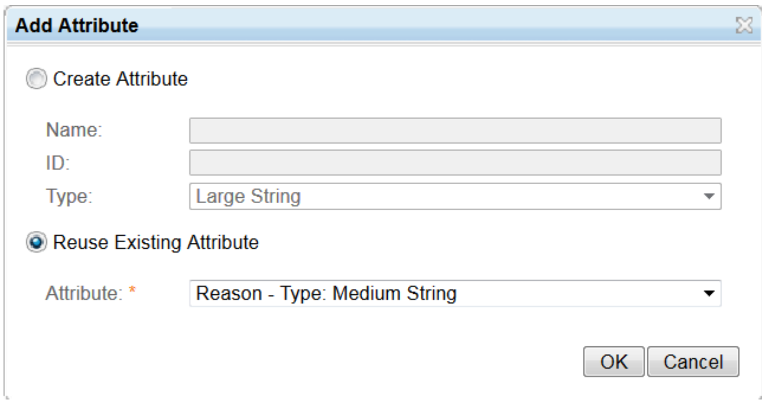
Reuse Existing Attribute: `Blocked – Type: Boolean`



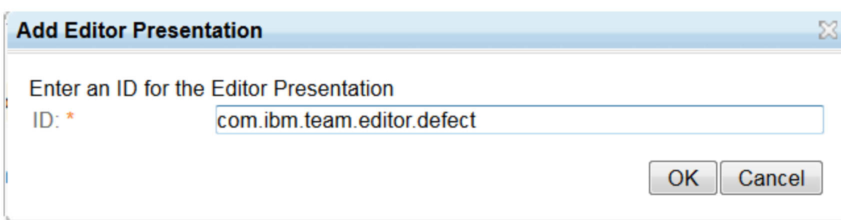
Name: `How Found`
ID: `com.ibm.team.workitem.attribute.howFound`
Type: `How Found`



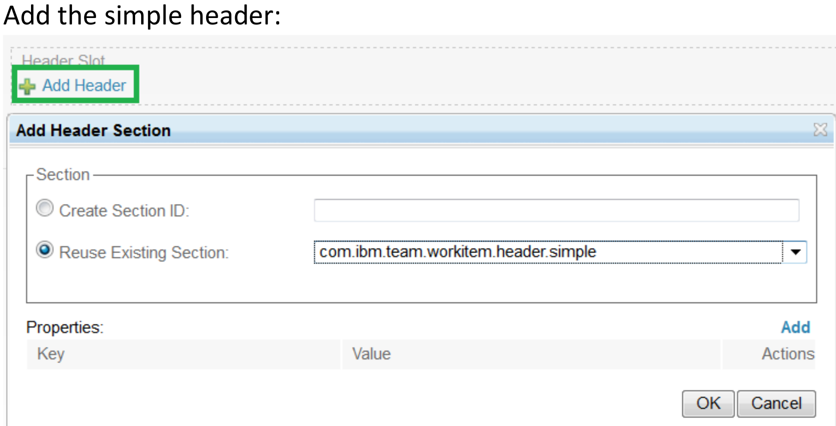
Reuse Existing Attribute: `Reason - Type: Medium String`



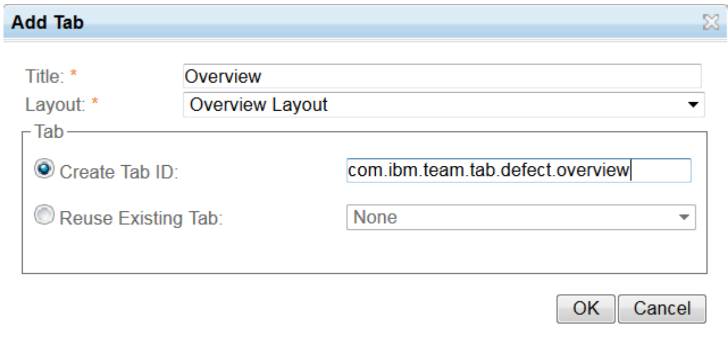
8. Save your changes.
9. Select **Editor Presentations**.
10. Click **Add...** to create a new `com.ibm.team.editor.defect` editor presentation:



11. Add the simple header:



12. Add the *Overview* tab by clicking the + to the right of **Add Section**.
13. Specify these details:
    Title: `Overview`
    Layout: `Overview Layout`
    Create Tab ID : `com.ibm.team.tab.defect.overview`



14. Click the ✚ under the new *Overview* section to add tabs for *Links, Approvals,* and *History,* specifying the details provided below for each section:

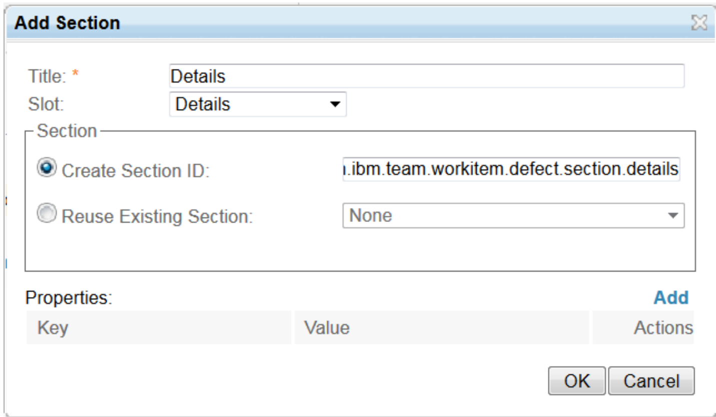
    Title: `:Links`
    Layout: `Links Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

    Title: `Approvals`
    Layout: `Approvals Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.approvals`

    Title: `History`
    Layout: `History Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

15. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary***,** specifying the details provided below for each section:

    Title: `Details`
    Slot: `Details`
    Create Section ID: `com.ibm.team.workitem.defect.section.details`

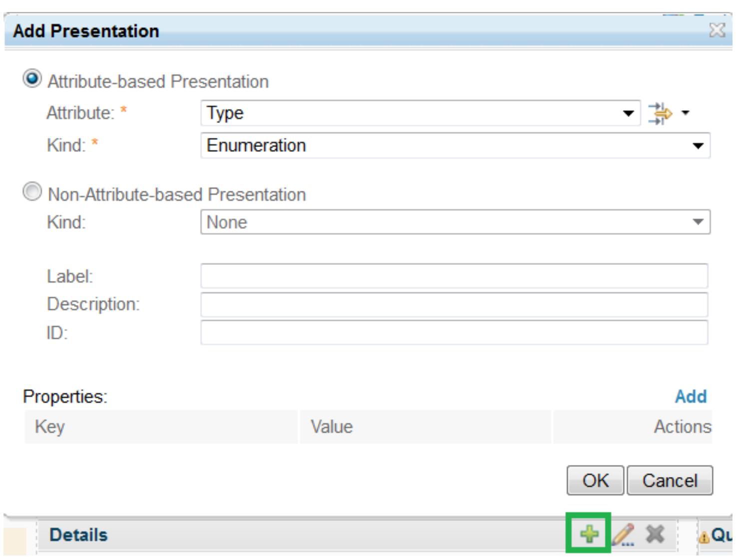


Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Description`
Slot: `Description`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

16. Save your changes.
17. In the **Details** section of the *Overview* tab, click the + to add the following attributes:
Attribute: `Type`
Kind: `Enumeration`



Non-Attribute-based Presentation: `Static Rich Text`
Rich Text: `Type Description` (with URL link: http://ibm.biz/BdHFKQ)

Attribute: `Filed Against`
Kind: `Category`

Attribute: `Severity`
Kind: `Enumeration`

Attribute: `Found In`
Kind: `Release`

Attribute: `How Found`
Kind: `Enumeration`

Non-Attribute-based Presentation
Kind: `Team and Project Area`

Attribute: `Creation Date`
Kind: `Timestamp`

Attribute: `Created By`
Kind: `Contributor`

Attribute: `Tags`
Kind: `Tags`

Attribute: `Owned By`
Kind: `Contributor`

Attribute: `Priority`
Kind: `Enumeration`

Attribute: `Planned For`
Kind: `Iteration`

Attribute: `Estimate`
Kind: `Time Estimates`

Attribute: `Time Spent`
Kind: `Time Spent`

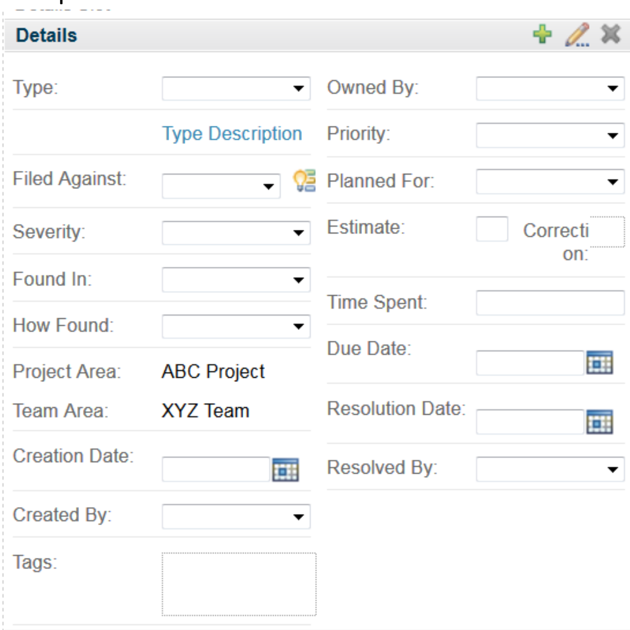
Attribute: `Due Date`

Kind: `Timestamp`

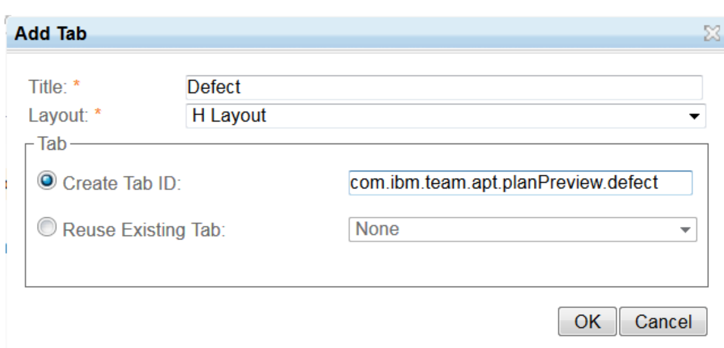
Attribute: `Resolution Date`
Kind: `Timestamp`

Attribute: `Resolved By`
Kind: `Contributor`

Your presentation should look like this:



18. Save your changes.
19. Select the *com.ibm.team.apt.planPreview* editor presentation.
20. Click the to add a new tab for *Defect.*
21. Specify these details:
    Title: `Defect`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.defect`



22. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.defect.section.details`

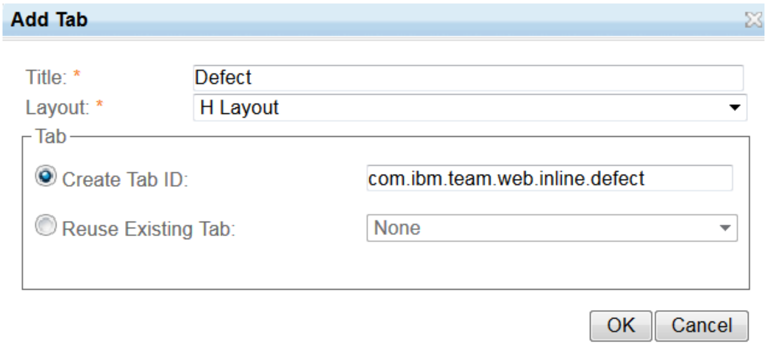
    Title: `Quick Information`
    Slot: `Right`
    Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
    Key: `noHeader`, **Value:** `true`

    Title: `Description`
    Slot: `Bottom`
    Reuse Existing Section: `com.ibm.team.workitem.section.description`

    Title: `Discussion`
    Slot: `Bottom`
    Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
    Key: `expanded`, **Value:** `false`

    Title: `Summary`
    Slot: `Top`
    Reuse Existing Section:
    `com.ibm.team.apt.planPreview.default.section.summary`
    Key: `noHeader`, **Value:** `true`

23. Save your changes.
24. Select the *com.ibm.team.workitem.web.inline* editor presentation.
25. Click the ✚ to add a new tab for *Defect.*
26. Specify these details:
    Title: `Defect`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.web.inline.defect`



27. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.defect.section.details`

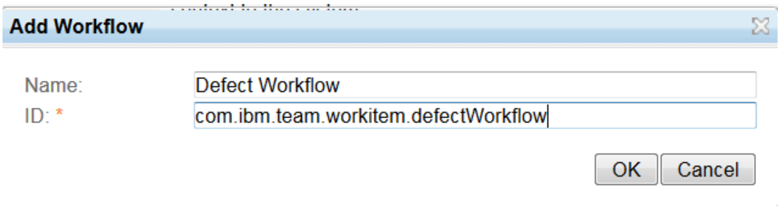
    Title: `Quick Information`
    Slot: `Right`
    Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
    Key: `noHeader,` **Value:** `true`

    Title: `Description`
    Slot: `Bottom`
    Reuse Existing Section: `com.ibm.team.workitem.section.description`

    Title: `Discussion`
    Slot: `Bottom`
    Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
    Key: `expanded,` **Value:** `false`

    Title: `Summary`
    Slot: `Top`
    Reuse Existing Section:
    `com.ibm.team.apt.planPreview.default.section.summary`
    Key: `noHeader,` **Value:** `true`

28. Save your changes.
29. Click **Workflows** and then **Add…** to create a new Defect workflow.
30. Specify the **Name** and **ID**: `Defect Workflow,` `com.ibm.team.workitem.defectWorkflow`



31. Click OK. Ignore the error about no start action… we're getting there!
32. Specify these **Resolutions** and **Icons** by clicking the **Add…** option in the **Resolutions** section and adding each one:

Resolutions

Icon	Name
	Invalid
	Works for Me
	Works as Designed
	Duplicate
	Fixed
	Fixed Upstream

33. Specify these **States**, **Groups**, **Show Resolution** values and **Icons** by clicking the **Add…** option in the **States** section and adding each one:

States — Add...

Configure the States for this Workflow. For each State, set the order in which Actions will appear throughout the user interface.

Icon	Name	Group	Show Resolution	Description	Workflow Actions	Actions
	In Development	In Progress	☐	Click to add description	Stop Working, Verify, Resolve	
	New	New	☐	Click to add description	Start Working, Resolve	
	Done	Done	☑	Click to add description	Reopen	
	In Test	In Progress	☑	Click to add description	Fail Verification, Resolve	

34. Specify these **Actions**, **Target States, Resolutions** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.

Actions **Add...**

Configure the Actions for this Workflow. For each Action that will have Resolutions, select those Resolutions and the order in which they will appear.

Icon	Name	Target State	Description	Resolutions	Actions
	Resolve	Done	Click to add description	Fixed, Duplicate, Works as Designed, Works for Me, Invalid, Fixed Upstream	
	Reopen	New	Click to add description	Click to select Resolutions	
	Start Working	In Development	Click to add description	Click to select Resolutions	
	Verify	In Test	Click to add description	Click to select Resolutions	
	Set Resolved	Done	Click to add description	Works for Me, Works as Designed, Duplicate, Fixed, Fixed Upstream, Invalid	
	Fail Verification	In Development	Click to add description	Click to select Resolutions	
	Stop Working	New	Click to add description	Click to select Resolutions	
	Initialize	New	Click to add description	Click to select Resolutions	

35. Specify the **Start Action**, **Resolve Action**, **Reopen Action** and these **Transitions** in the **Transitions** section.

Start Action: * Initialize | Resolve Action: Resolve | Reopen Action: Reopen

Duplicate Resolution: Duplicate

Transitions

From \ To	In Development	New	Done	In Test
In Development	<None>	Stop Working	Resolve	Verify
New	Start Working	<None>	Resolve	None
Done	None	Reopen	<None>	None
In Test	Fail Verification	None	Resolve	<None>

36. Select **Types and Attributes**.
37. Select *Defect*.
38. Set the **Editors** and **Workflow** as shown below:

Defect | Add... | Remove

Details

Name: *	Defect	Icon: Edit...
ID:	com.ibm.team.workitem.workItemType.defect	
Type Category:	com.ibm.team.workitem.workItemType.defect	
Alias:	defect, bug	
Editor Presentation:	Work Item Editor	com.ibm.team.editor.defect
	Inline Work Item Editor	com.ibm.team.web.inline.defect
	Lightweight Work Item Creation Dialog	com.ibm.team.workitem.lightweight.editor.section
	Plan Editor Preview	com.ibm.team.apt.planPreview.defect
Workflow:	Defect Workflow	

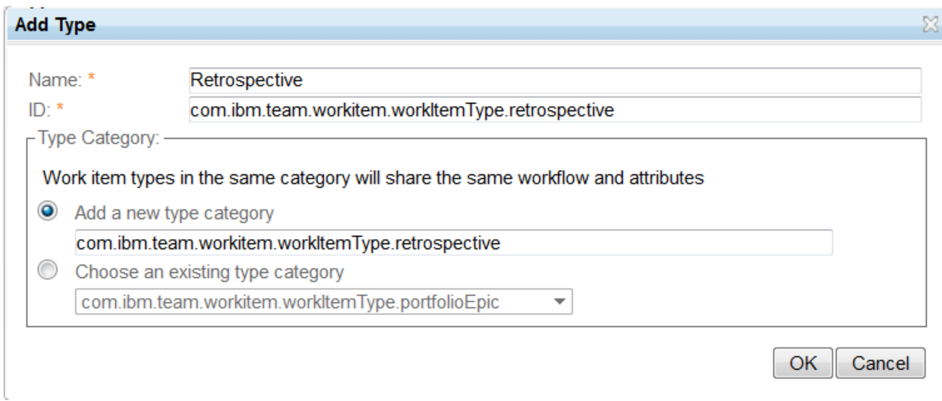
39. Save your changes.
40. Select **Enumerations**.
41. Select **Epic Type** and then click the **Remove** button to delete it.
42. Save your changes.

RETROSPECTIVE

1. Select **Types and Attributes**.
2. Select **Add…** to add a new Work Item Type.
3. Specify these details:

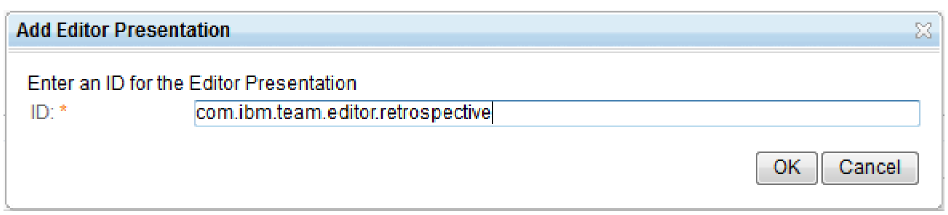
> ***Note:*** *You can reference your **My SAFe V4.0 Program** project area when specifying the Retrospective work item to view the editors.*

Name : `Retrospective`
ID: `com.ibm.team.workitem.workItemType.retrospective`
Add a new type category:
`com.ibm.team.workitem.workItemType.retrospective`

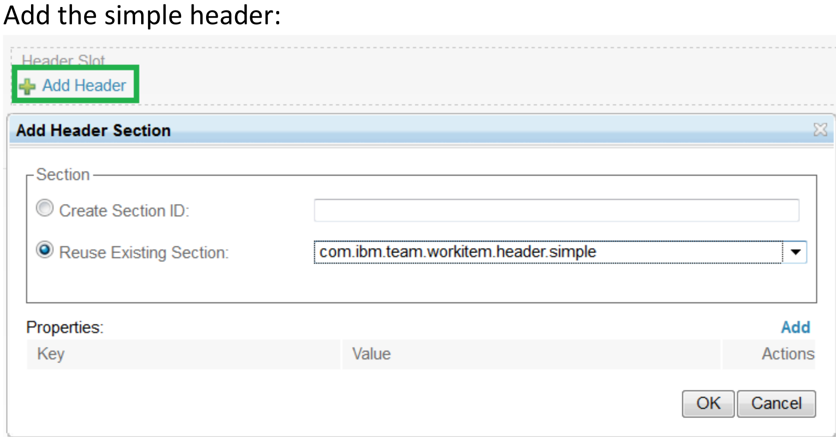


4. Click OK.
5. Choose an icon:

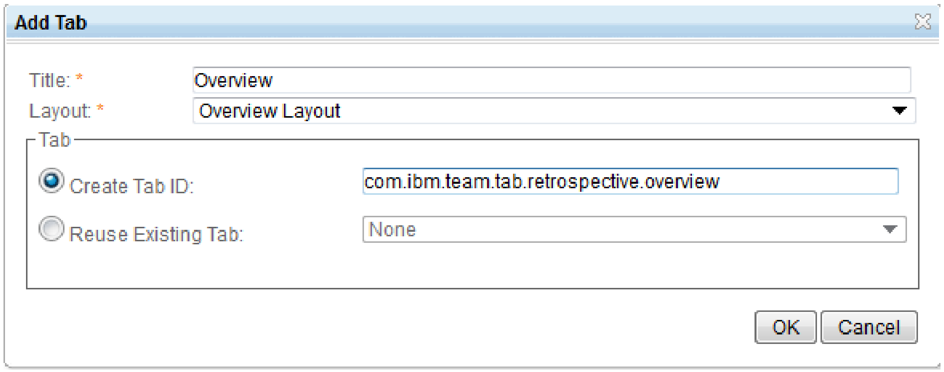
6. Select **Editor Presentations**.
7. Click **Add…** to create a new `com.ibm.team.editor.retrospective` editor presentation:



8. Add the simple header:



9. Add the *Overview* tab by clicking the + to the right of **Add Section**.
10. Specify these details:
    Title: `Overview`
    Layout: `Overview Layout`
    Create Tab ID : `com.ibm.team.tab.retrospective.overview`



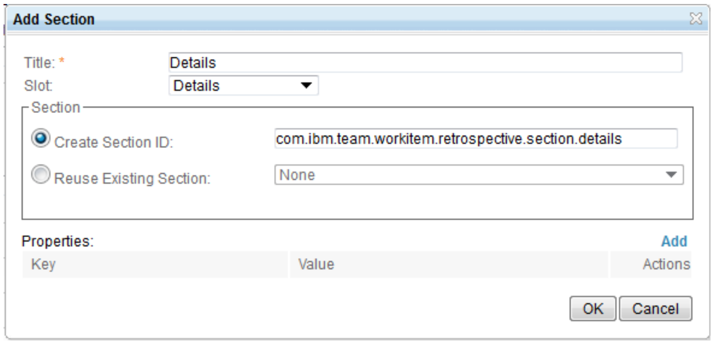
11. Click the + under the new *Overview* section to add tabs for *Links* and *History,* specifying the details provided below for each section:

    Title: `:Links`
    Layout: `Links Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.links`

    Title: `History`
    Layout: `History Layout`
    Resuse Existing Tab : `com.ibm.team.workitem.tab.history`

12. Select the *Overview* tab and click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary*, specifying the details provided below for each section:

    Title: `Details`
    Slot: `Details`
    Create Section ID: `com.ibm.team.workitem.retrospective.section.details`

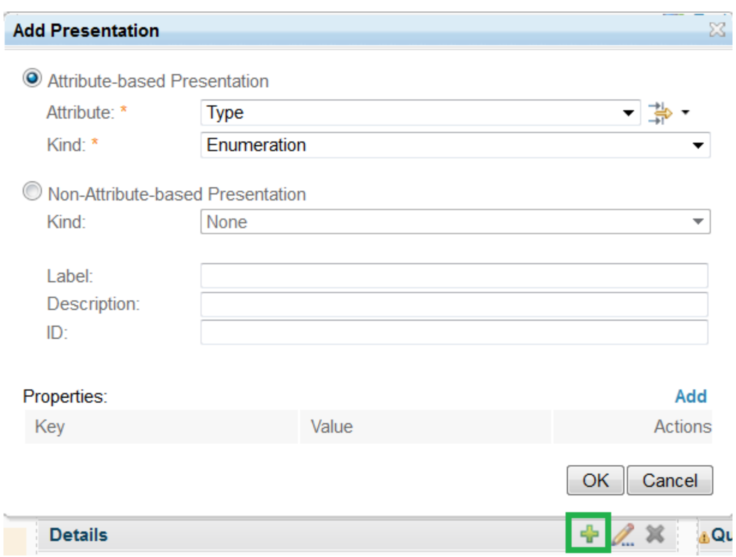


Title: `Quick Information`
Slot: `Quick Information`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

Title: `Description`
Slot: `Description`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

Title: `Discussion`
Slot: `Discussion`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`

13. Save your changes.
14. In the **Details** section of the *Overview* tab, click the + to add the following attributes:
Attribute: `Type`
Kind: `Enumeration`



Non-Attribute-based Presentation: `Static Rich Text`
Rich Text: `Type Description` (with URL link: http://ibm.biz/BdHFKw)

Attribute: `Filed Against`
Kind: `Category`

Non-Attribute-based Presentation: `Team and Project Area`

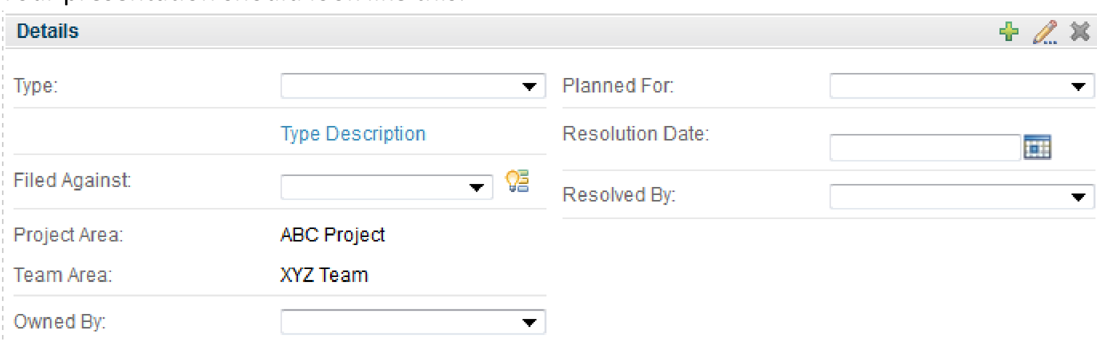
Attribute: `Owned By`
Kind: `Contributor`

Attribute: `Planned For`
Kind: `Iteration`

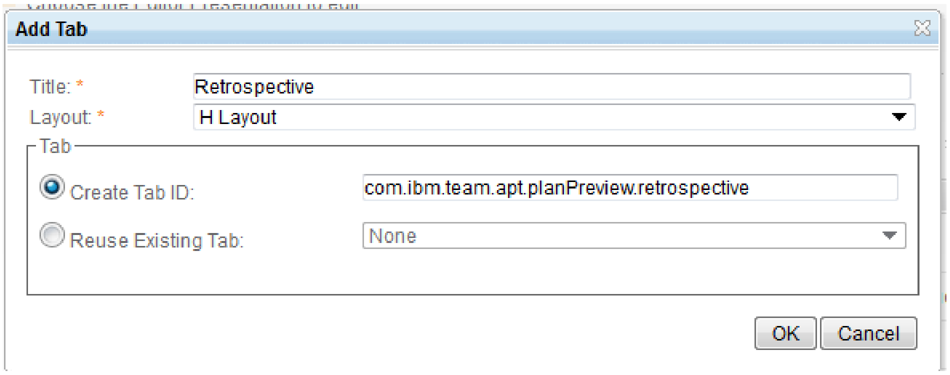
Attribute: `Resolution Date`
Kind: `Timestamp`

Attribute: `Resolved By`
Kind: `Contributor`

Your presentation should look like this:

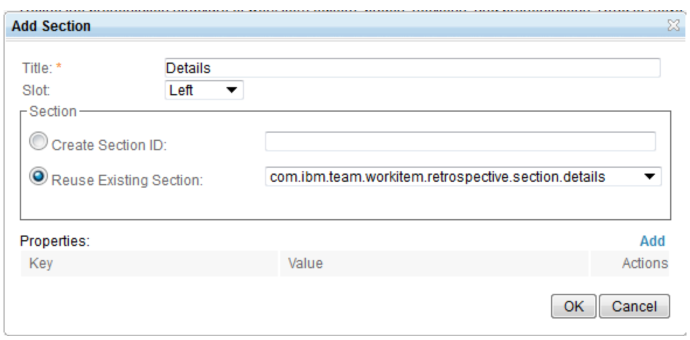


15. Save your changes.
16. Select the *com.ibm.team.apt.planPreview* editor presentation.
17. Click the + to add a new tab for *Retrospective.*
18. Specify these details:
    Title: `Retrospective`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.apt.planPreview.retrospective`



19. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

Title: `Details`
Slot: `Left`
Reuse Existing Section: `com.ibm.team.workitem.retrospective.section.details`



Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`
Key: `noHeader`, **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

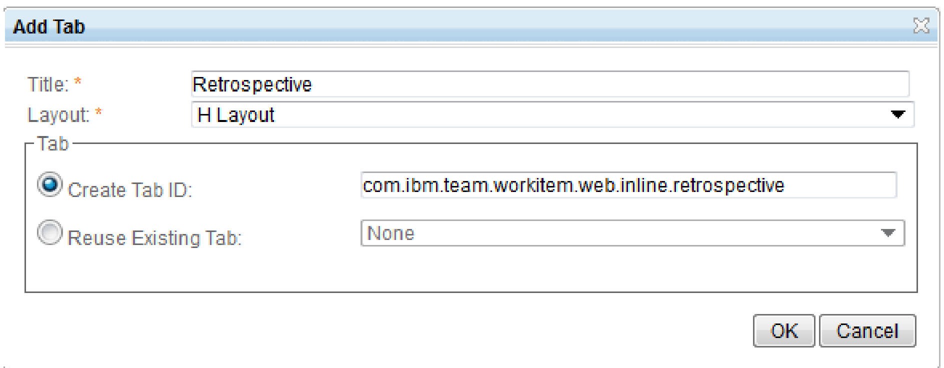
Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

Title: `Summary`
Slot: `Top`

Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

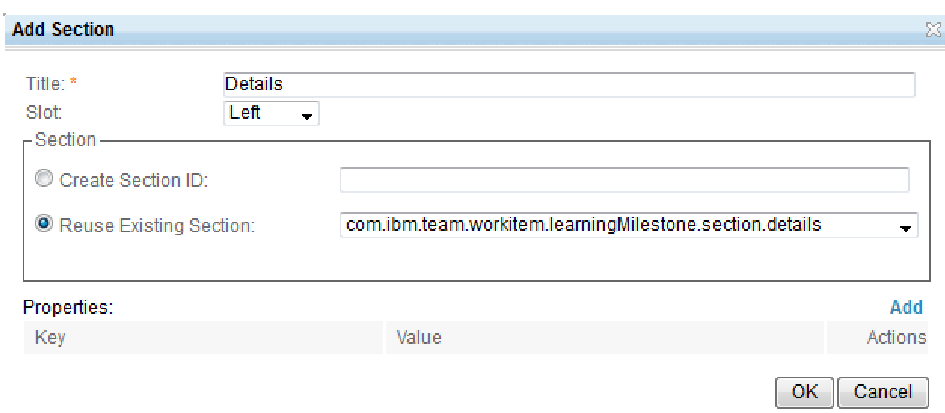
20. Save your changes.
21. Select the *com.ibm.team.workitem.web.inline* editor presentation.
22. Click the ✚ to add a new tab for *Retrospective.*
23. Specify these details:

    Title: `Retrospective`
    Layout: `H Layout`
    Create Tab ID: `com.ibm.team.workitem.web.inline.retrospective`



24. Click the **Add Section** link to add sections for *Details, Quick Information, Description, Discussion,* and *Summary* specifying the details provided below for each section:

    Title: `Details`
    Slot: `Left`
    Reuse Existing Section: `com.ibm.team.workitem.retrospective.section.details`



Title: `Quick Information`
Slot: `Right`
Reuse Existing Section: `com.ibm.team.workitem.section.quickinformation`

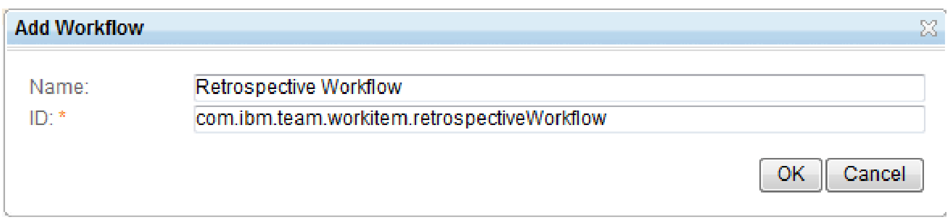
Key: `noHeader`, **Value:** `true`

Title: `Description`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.description`

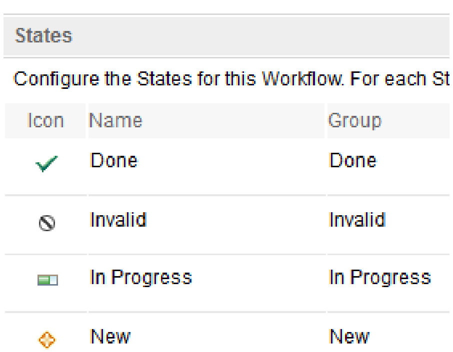
Title: `Discussion`
Slot: `Bottom`
Reuse Existing Section: `com.ibm.team.workitem.section.discussion`
Key: `expanded`, **Value:** `false`

Title: `Summary`
Slot: `Top`
Reuse Existing Section:
`com.ibm.team.apt.planPreview.default.section.summary`
Key: `noHeader`, **Value:** `true`

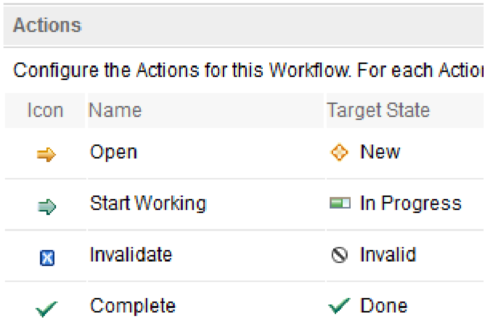
25. Save your changes.
26. Click **Workflows** and then **Add…** to create a new Retrospective workflow.
27. Specify the **Name** and **ID**: `Retrospective Workflow`, `com.ibm.team.workitem.retrospectiveWorkflow`



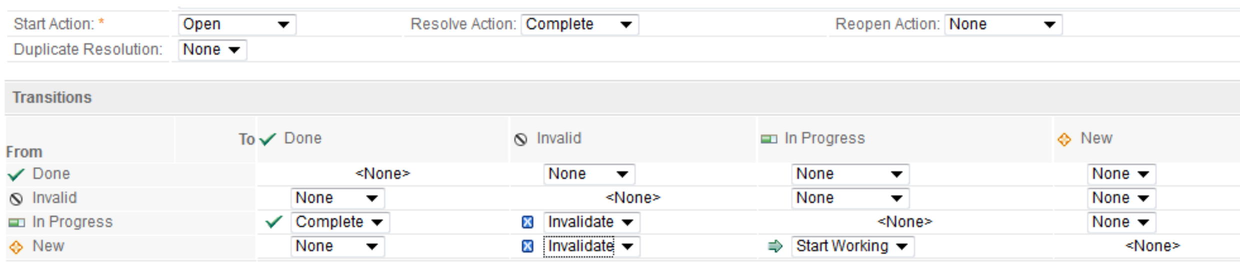
28. Click OK. Ignore the error about no start action… we're getting there!
29. Specify these **States**, **Groups** and **Icons** by clicking the **Add…** option in the **States** section and adding each one:



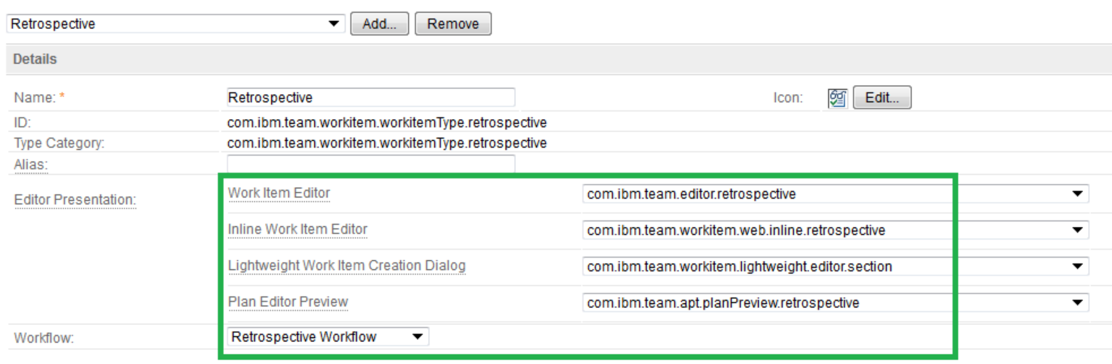
30. Specify these **Actions**, **Target States** and **Icons** by clicking the **Add…** option in the **Actions** section and adding each one.



31. Specify the **Start Action**, **Resolve Action**, **Reopen Action** and these **Transitions** in the **Transitions** section.



32. Select **Types and Attributes**.
33. Select *Retrospective.*
34. Set the **Editors** and **Workflow** as shown below:

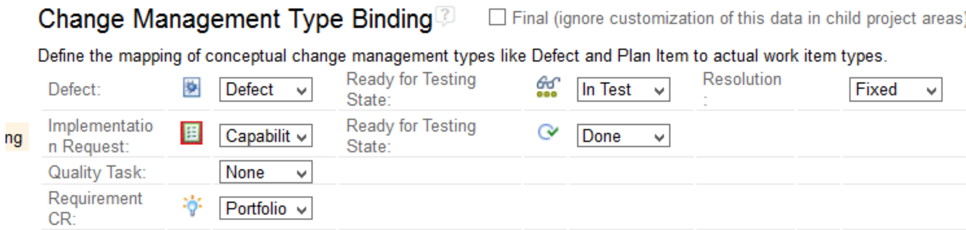


35. Save your changes.

Change Management Type Binding

Before continuing, set up the type bindings for the work item types to indicate things like which reflect plan items or defects.

1. Select **Change Management Type Binding.**
2. Specify the following:

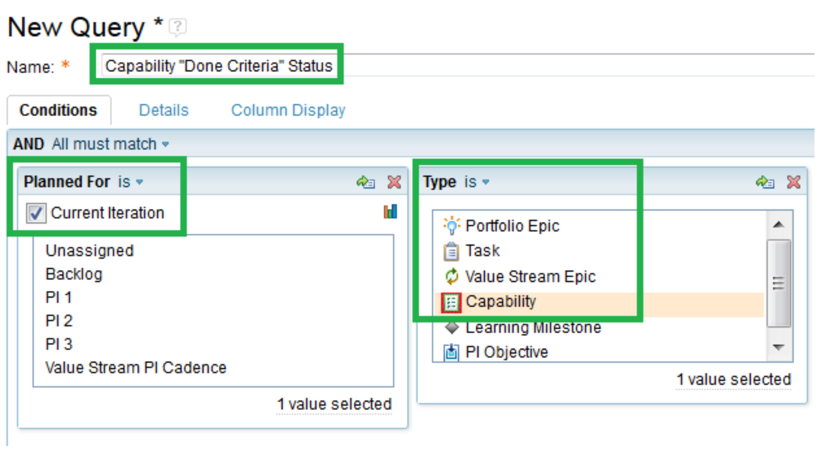


3. Save your changes.

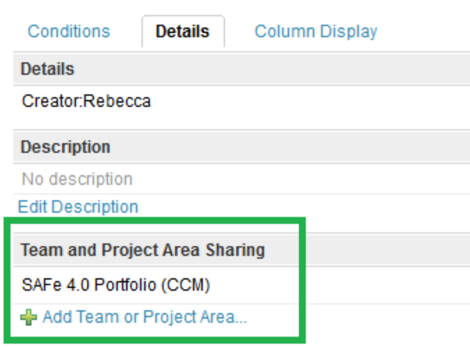
Queries

In this section you will create new queries to support additions in SAFe 4.0.

1. In the top right of the **Application Administration – Change and Configuration Management (CCM)**, select the *Explore Project* link.
2. Create a new Work Item query by selecting **Work Items > Create Query** in the menu bar.
3. Name your new query `Capability “Done Criteria” Status` and add conditions as shown below:



4. Click *Details* and then **+Add Team or Project Area…** to share your query:



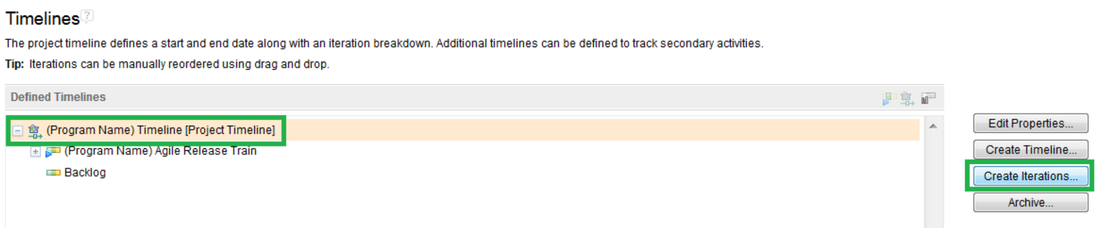
5. Save your changes. Later you will add this to the **Predefined queries** in the Eclipse client and add a dashboard widget to display the results of this query.

SAFE V4.0 PROGRAM CONFIGURATIONS (BROWSER)

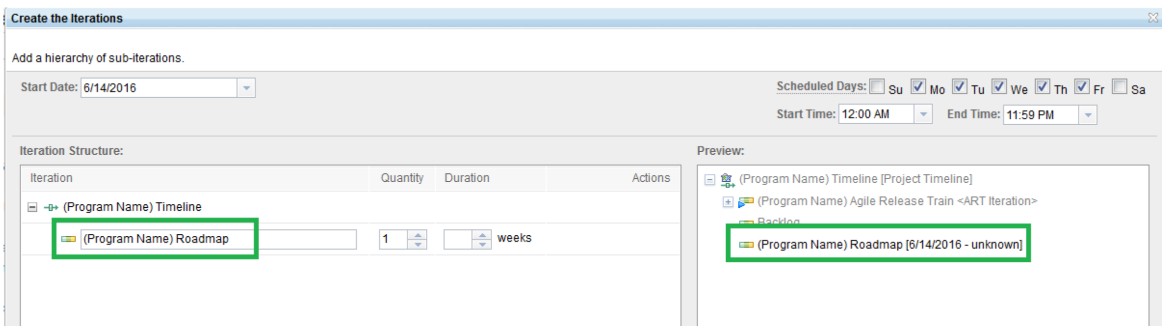
TIMELINES

In this section, you update the Program timeline so that it includes a Roadmap iteration that encapsulates both the ART iteration as well as the Backlog.

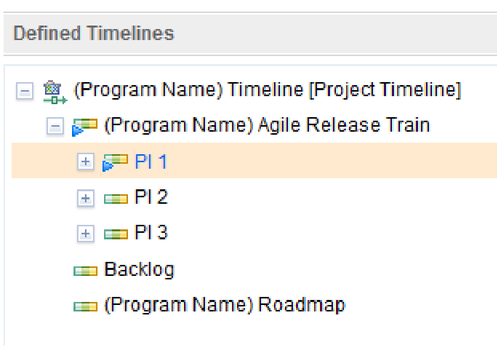
1. Launch the Application Administration page for the **My SAFe V4.0 Program** project area.
2. Select the **Timelines** option in the left navigation bar.
3. Select the **(Program Name) Timeline** and then click the **Create Iterations…** button:



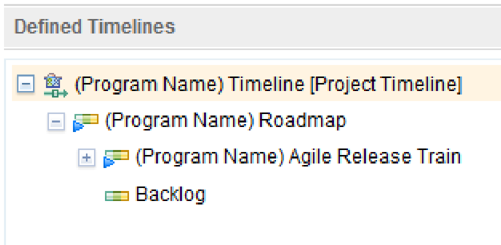
4. In the **Create the Iterations** dialog, specify `(Program Name) Roadmap` and click OK:



Your updated timeline should look similar to this:



5. Select and drag the *Backlog* and *(Program Name) Agile Release Train* iterations so that they appear after the *(Program Name) Roadmap* iteration. Your final timeline should look similar to this:



6. Save your changes.

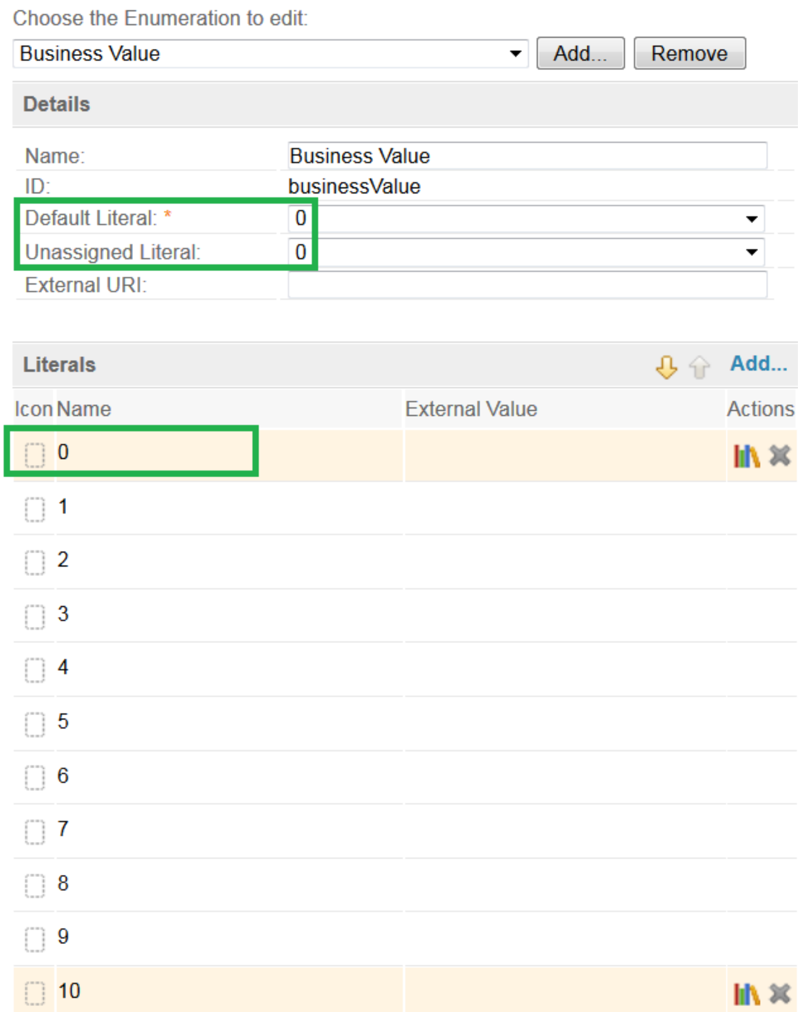
Work Items

In this section, you update existing work item types.

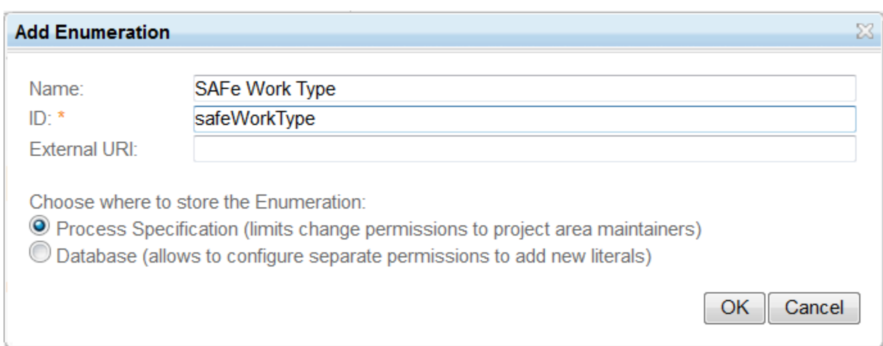
WORK ITEM ENUMERATIONS

You must first create some new enumerations and update existing ones before configuring the work item types and attributes.

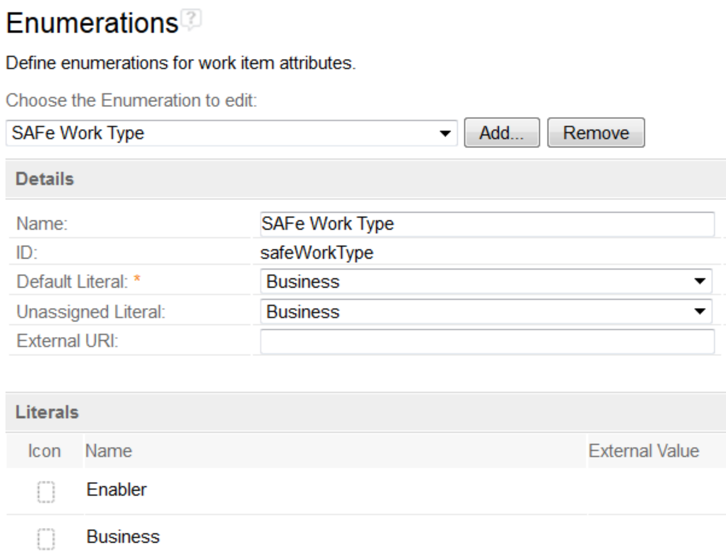
1. Launch the Application Administration page for the **My SAFe V4.0 Program** project area.
2. Select **Work Items** in the left navigation bar and then **Enumerations**.
3. Edit the **Business Value** enumeration and select **Add...** to add the 0 literal. Move it to the top of the Literals list and set 0 as the **Default** and **Unassigned Literal** values:



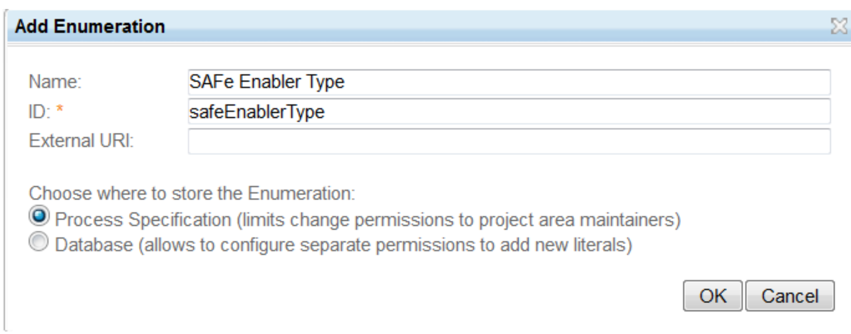
4. Click the **Add...** button to create a new **SAFe Work Type** enumeration.
5. Specify the **Name** and **ID**: `SAFe Work Type, safeWorkType`



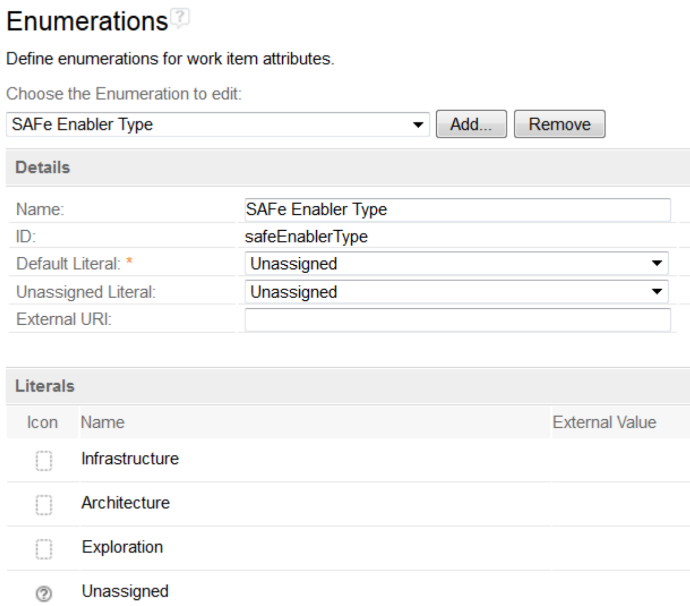
6. Select **Add...** to add literals: `Enabler, Business`. Set `Business` for the **Default** and **Unassigned Literal** values:



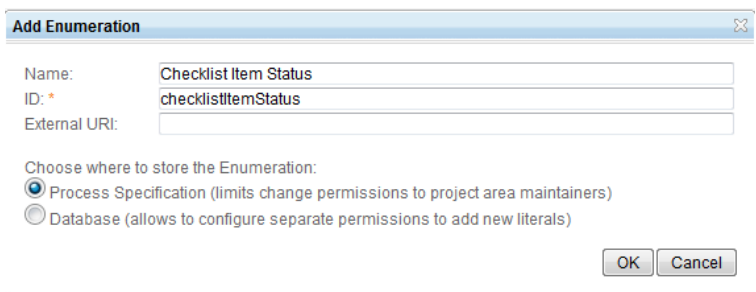
7. Click the **Add...** button to create a new **SAFe Enabler Type** enumeration.
8. Specify the **Name** and **ID**: `SAFe Enabler Type, safeEnablerType`



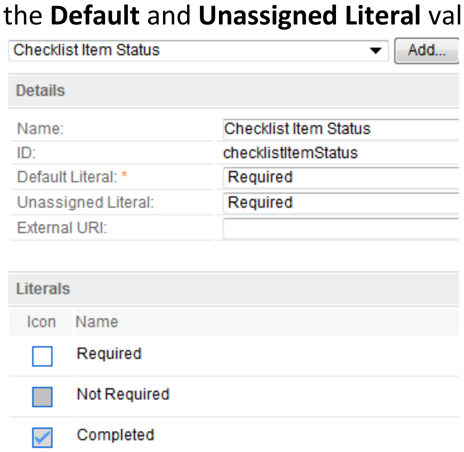
9. Select **Add...** to add literals: `Infrastructure, Architecture, Exploration, Unassigned`. Set `Unassigned` as the **Default** and **Unassigned Literal** values:



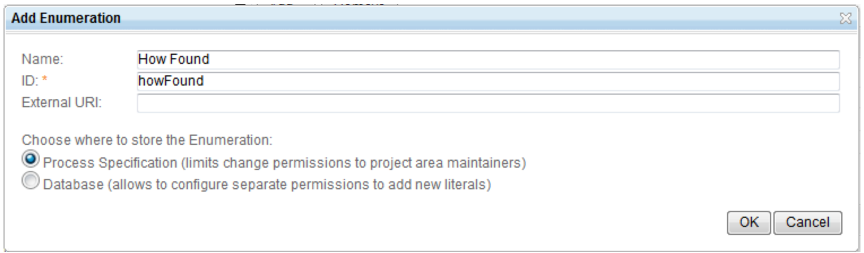
10. Click the **Add...** button to create a new **Checklist Item Status** enumeration.
11. Specify the **Name** and **ID**: `Checklist Item Status, checklistItemStatus`



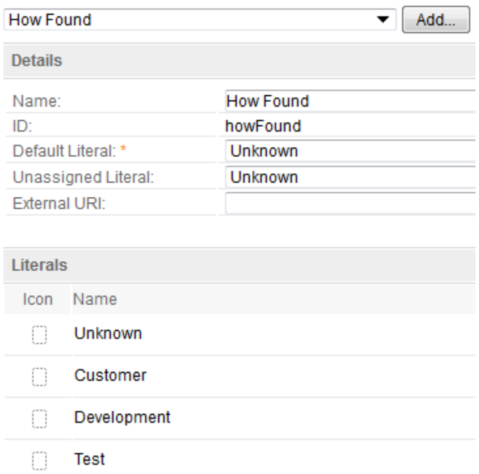
12. Select **Add...** to add literals: `Required, Complete, Not Required`. Set `Required` for the **Default** and **Unassigned Literal** values:



13. Click the **Add...** button to create a new **How Found** enumeration.
14. Specify the **Name** and **ID**: `How Found, howFound`



15. Select **Add...** to add literals: `Unknown, Customer, Development, Test`. Set `Unknown` for the **Default** and **Unassigned Literal** values:



Add your own "How Found" enumeration literals as required for your organization.

16. Save your changes.

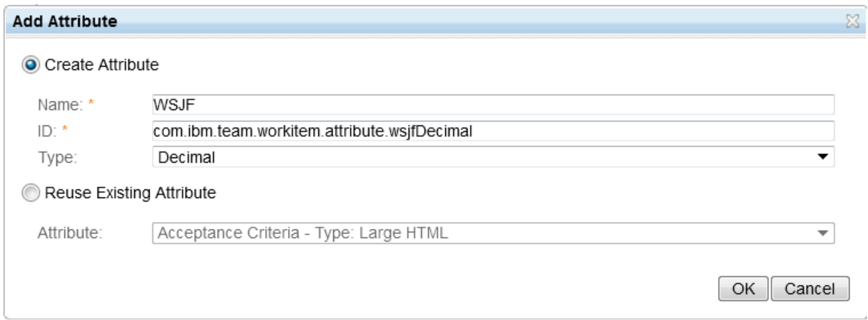
WORK ITEM TYPES

PROGRAM EPIC

1. Select **Types and Attributes**.
2. Select *Program Epic*.
3. Scroll down to the **Attributes** section and locate the existing *WSJF* attribute. Click on the **Name** field to change the name to `WSJF (integer)`:

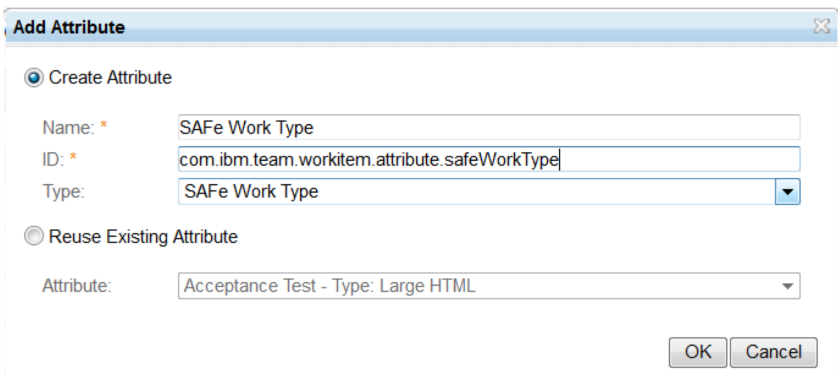
4. Click **Add...** to add a new *WSJF* attribute with these details:

Name: `WSJF`
ID: `com.ibm.team.workitem.attribute.wsjfDecimal`
Type: `Decimal`



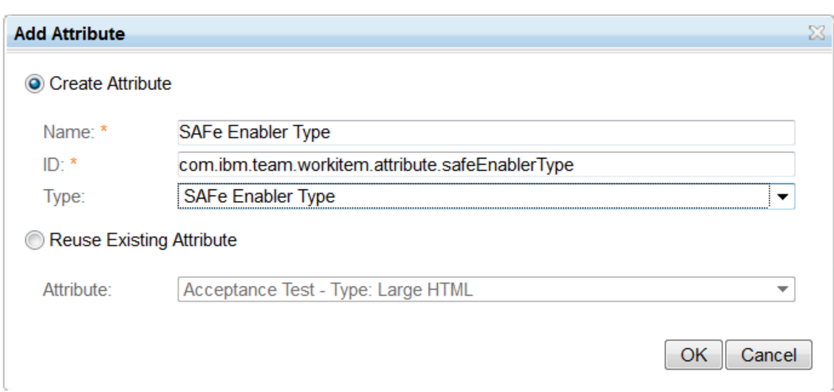
5. Scroll down to the **Attributes** section and click **Add...** to add the *SAFe Work Type* attribute.
6. Specify these details:

Name: `SAFe Work Type`
ID: `com.ibm.team.workitem.attribute.safeWorkType`
Type: `SAFe Work Type`



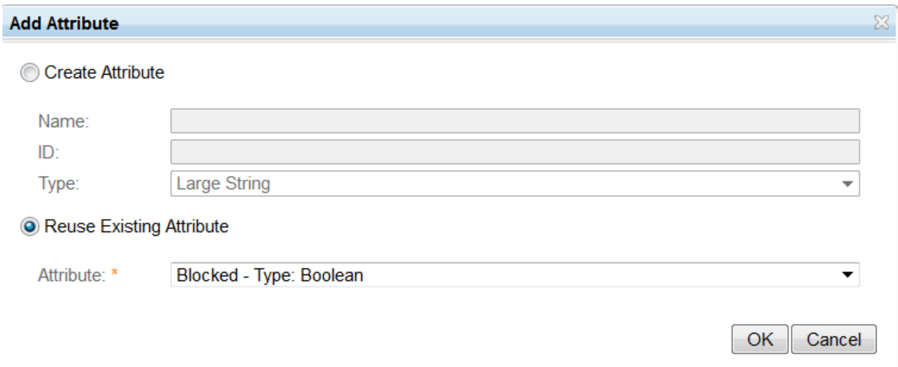
7. Click **Add...** to add the *SAFe Enabler Type* attribute.
8. Specify these details:

Name: `SAFe Enabler Type`
ID: `com.ibm.team.workitem.attribute.safeEnablerType`
Type: `SAFe Enabler Type`



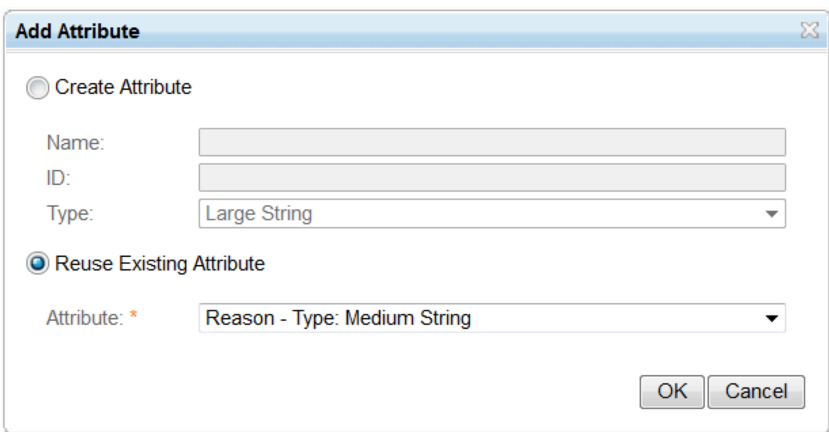
9. Click **Add...** to add the *Blocked* attribute:

   Resuse Existing Attribute : `Blocked – Type: Boolean`



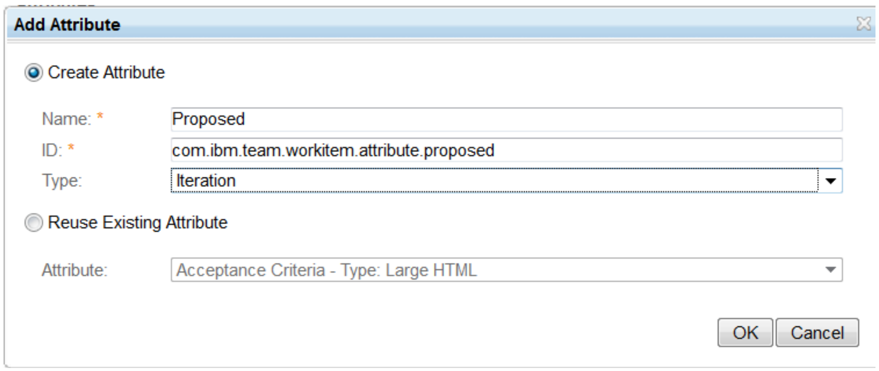
10. Click **Add...** to add the *Reason* attribute:

    Resuse Existing Attribute : `Reason – Type: Medium String`



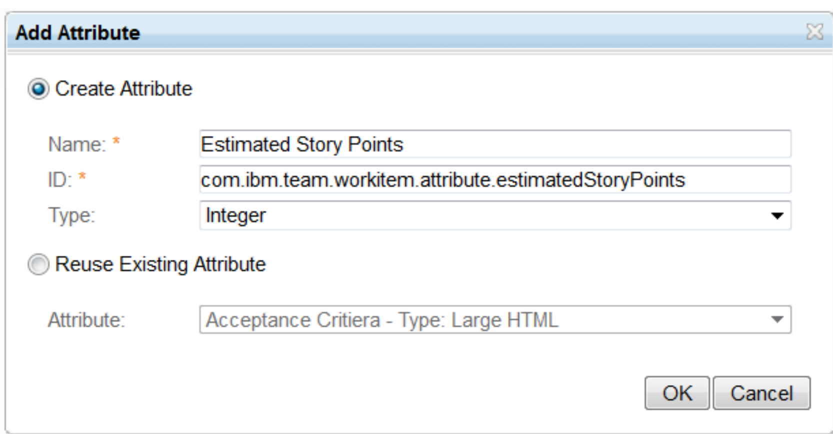
11. Click **Add...** to add the *Proposed* attribute.
12. Select the **Create Attribute** radio button and specify these details:

    Name : `Proposed`
    ID: `com.ibm.team.workitem.attribute.proposed`
    Type: `Iteration`



13. Click **Add…** to add the *Estimated Story Points* attribute.
14. Select the **Create Attribute** radio button and specify these details:

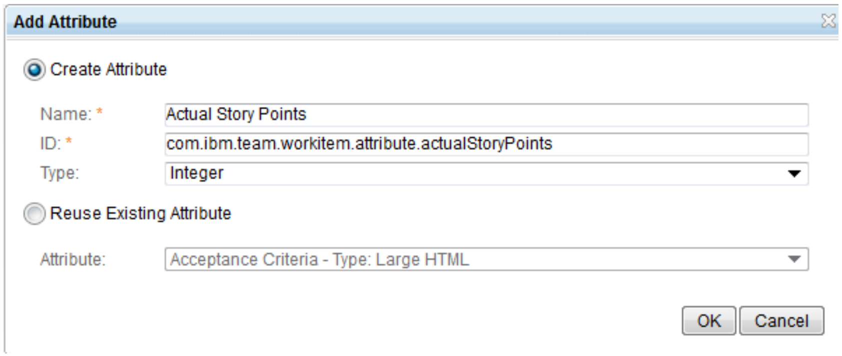
Name: `Estimated Story Points`
ID: `com.ibm.team.workitem.attribute.estimatedStoryPoints`
Type: `Integer`



15. Click **Add…** to add the *Actual Story Points* attribute.
16. Select the **Create Attribute** radio button and specify these details:

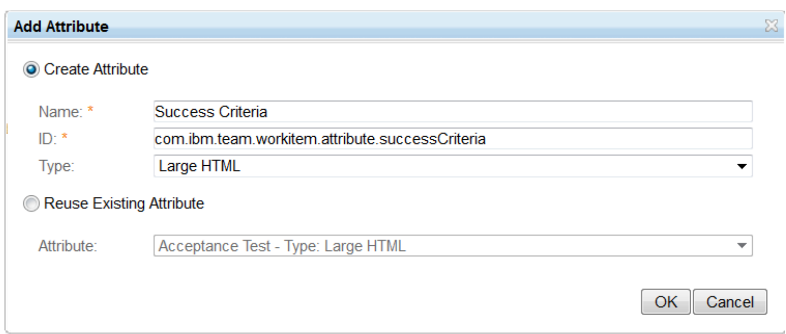
Name: `Actual Story Points`
ID: `com.ibm.team.workitem.attribute.actualStoryPoints`
Type: `Integer`

*Note: If your organization prefers to reflect "effort" in terms of something other than Story Points, simply change the names of these attribute. For example, you might just call them **Estimated Effort** and **Actual Effort**, which provides ultimate flexibility to measure "effort" in terms of Story Points, or Headcount, or Person Months, or anything else.*



17. Click **Add...** to add a *Success Criteria* attribute.
18. Specify these details:

Name: `Success Criteria`
ID: `com.ibm.team.workitem.attribute.successCriteria`
Type: `Large HTML`



19. Remove the *Epic Type* attribute:

20. Save your changes.
21. Select **Editor Presentations**.
22. Select *com.ibm.team.editor.programEpic* in the **Choose the Editor Presentation to edit:** selection list.
23. Make sure the *Overview* section is selected, then click the **+** on the **Details** bar to add the following attributes, providing these details:

Attribute: `Estimated Story Points`
Kind: `Integer`

Attribute: `Actual Story Points`
Kind: `Integer`

Attribute: `Proposed`

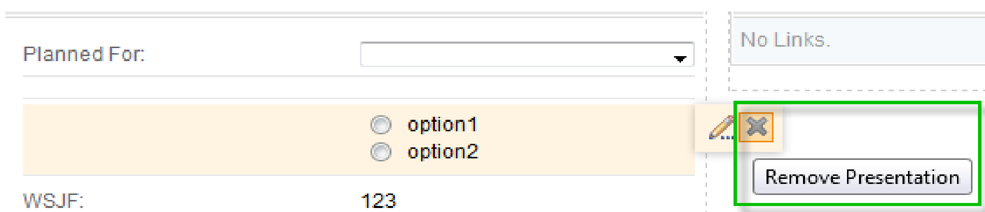
Kind: `Iteration`

Attribute: `WSJF`
Kind: `Decimal`

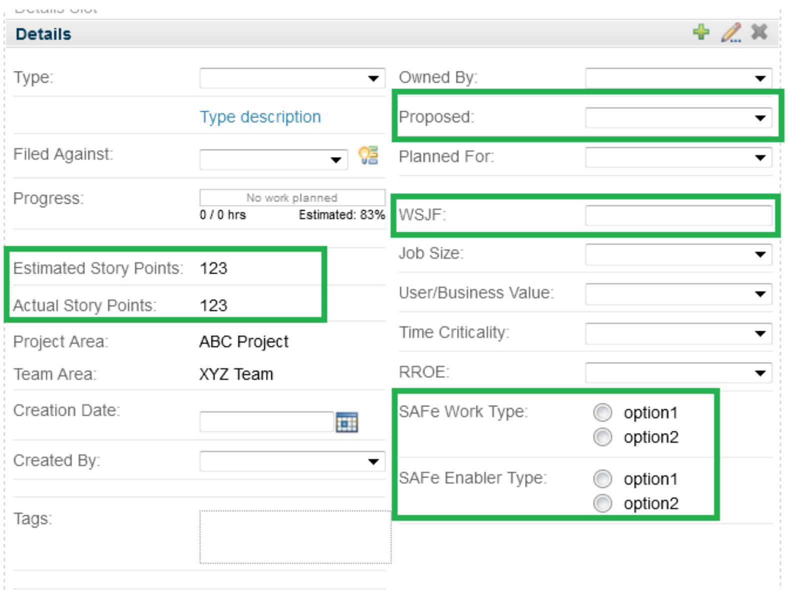
Attribute: `SAFe Work Type`
Kind: `Radio Group`

Attribute: `SAFe Enabler Type`
Kind: `Radio Group`

24. Make these changes to position the attributes:
    a. Drag and drop the WSJF above renamed WSJF (integer) attribute
    b. Select the **Remove Presentation** icon next to the original WSJF (integer) attribute to remove it
    c. Drag and drop the *Estimated Story Points* and *Actual Story Points* under the **Progress** attribute
    d. Drag and drop the *Proposed* attribute before the *Planned For* attribute
    e. Select the **Remove Presentation** icon next to the “empty” attribute because you deleted the Epic Type:

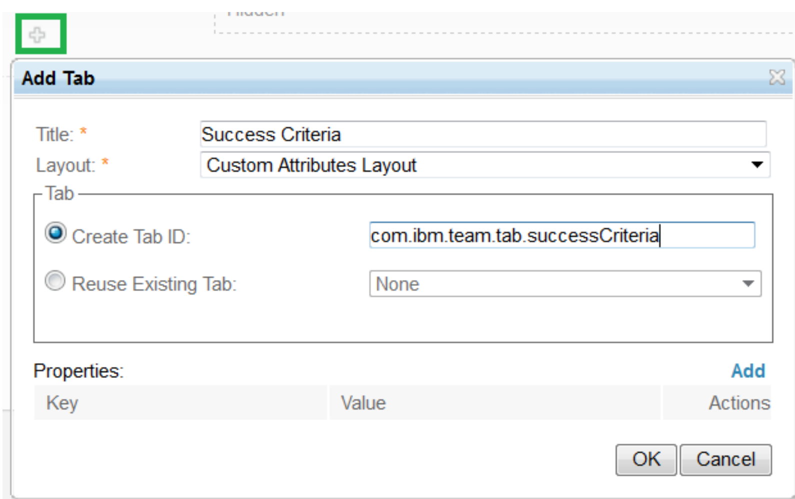


25. Your updated editor presentation should look like this:

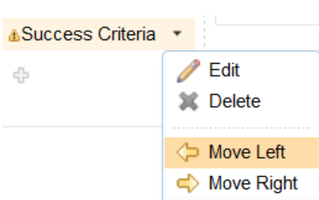


26. Click the under the *History* section to add a new tab for *Success Criteria*, specifying these details:

Title: `Success Criteria`
Layout: `Custom Attributes Layout`
Create Tab ID: `com.ibm.team.tab.successCriteria`

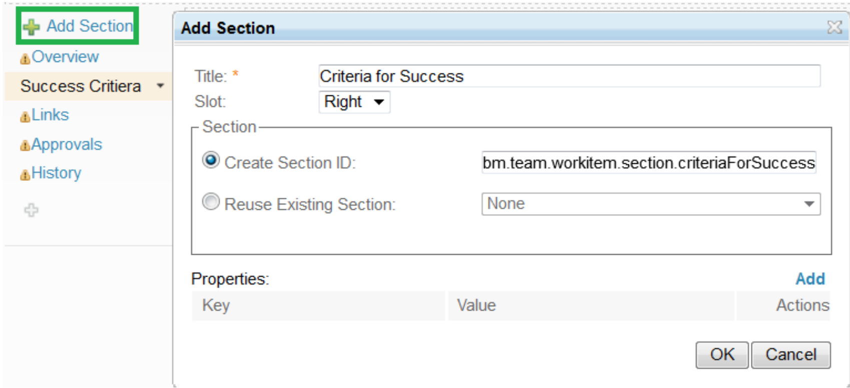


27. Use the **Success Criteria > Move Left** option to position this new tab after the *Overview* section:

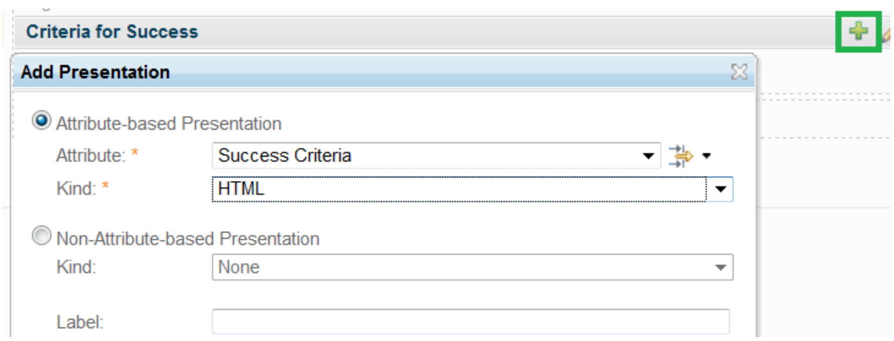


28. Select the *Success Criteria* tab and add a section:

Title: `Criteria for Success`
Slot: `Right`
Create Section ID: `com.ibm.team.workitem.section.criteriaForSuccess`

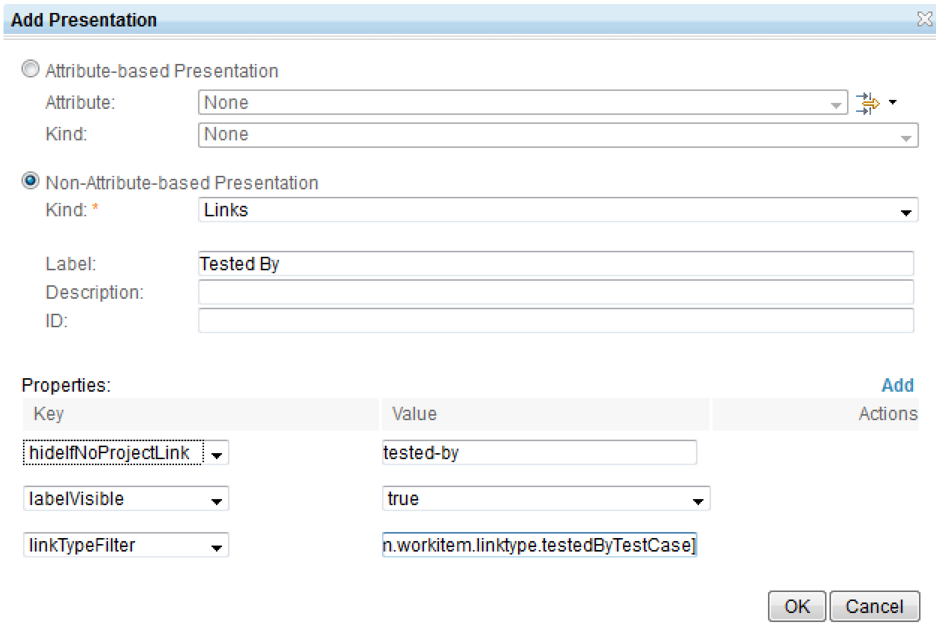


29. In the new **Criteria for Success** section, click the **+** to add the *Success Criteria* attribute:

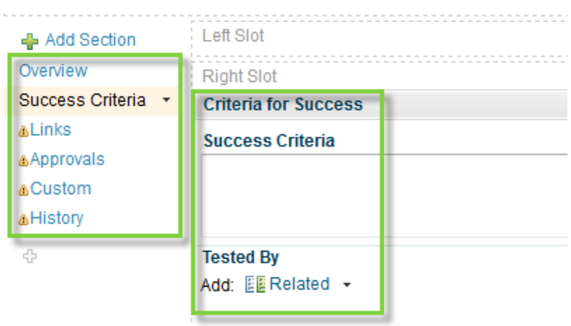


30. Add another attribute for linked test cases and specify the following details:

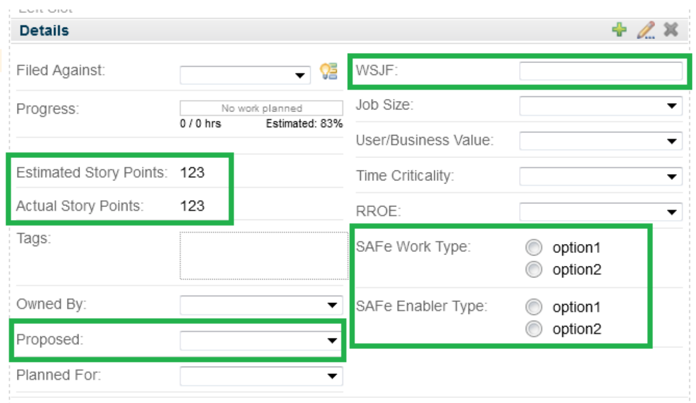
Non-Attribute-based Presentation
Kind: `Links`
Label: `Tested By`
Properties:
 hideifNoProjectLink `tested-by`
 labelVisible `true`
 linkTypeFilter `[com.ibm.team.workitem.linktype.testedByTestCase]`



31. Your updated editor presentation should look like this:



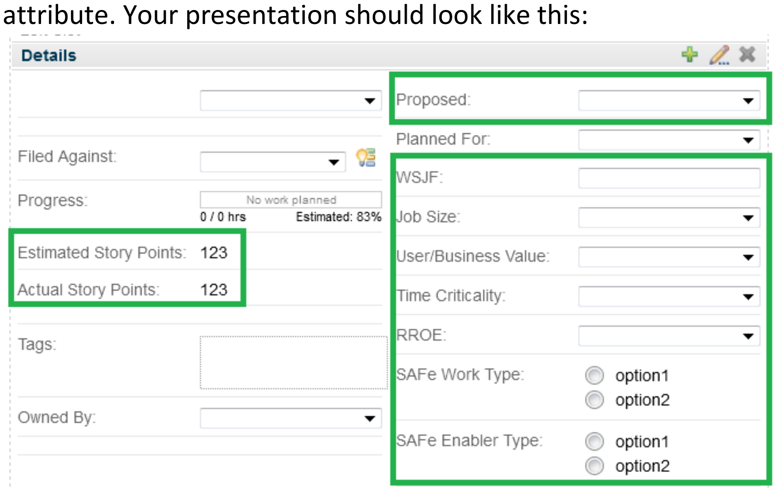
32. Save your changes.
33. Select the *com.ibm.team.apt.planPreview* editor presentation.
34. Select the **Program Epic** tab and add the *WSJF, SAFe Work Type, SAFe Enabler Type*, *Proposed, Planned For, Estimated Story Points* and *Actual Story Points* as you did above. Delete the "empty" attribute left behind when you deleted the *Epic Type* attribute. Your presentation should look like this:



Note: If you are using the 6.0.1 versions of the templates, you will not have WSJF or its component attributes. Add them by following the instructions provided for the web.inline editor below.

35. Save your changes.
36. Select the *com.ibm.team.workitem.web.inline* editor presentation.
37. Select the **Program Epic** tab and add the *WSJF, Job Size, User/Business Value, Time Criticality, RROE, SAFe Work Type, SAFe Enabler Type*, *Estimated Story Points* and *Actual Story Points* as you did above, specifying the following details:
    Attribute: `WSJF`, **Kind**: `Decimal`
    Attribute: `Job Size`, **Kind**: `Enumeration`
    Attribute: `User/Business Value`, **Kind**: `Enumeration`
    Attribute: `Time Criticality`, **Kind**: `Enumeration`
    Attribute: `RROE`, **Kind**: `Enumeration`
    Attribute: `SAFe Work Type`, **Kind**: `Radio Group`
    Attribute: `SAFe Enabler Type`, **Kind**: `Radio Group`
    Attribute: `Estimated Story Points`, **Kind**: `Integer`
    Attribute: `Actual Story Points`, **Kind**: `Integer`
    Attribute: `Proposed`, **Kind:** `Iteration`

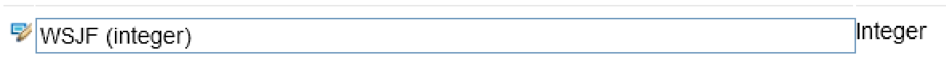
38. Delete the *WSJF (integer)* and the “empty” attribute left behind when you deleted the *Epic Type* attribute. Your presentation should look like this:



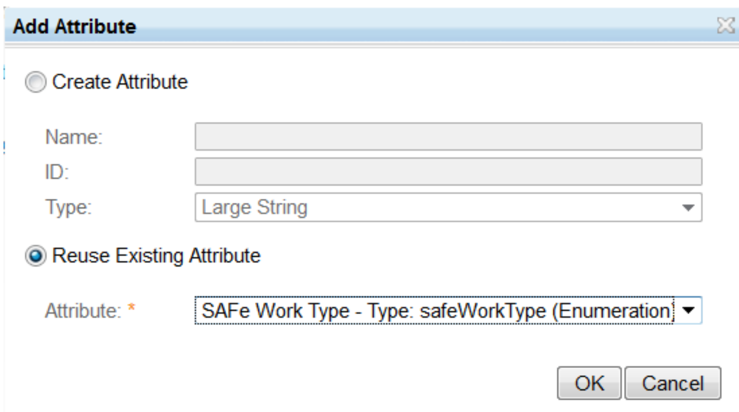
39. Save your changes.

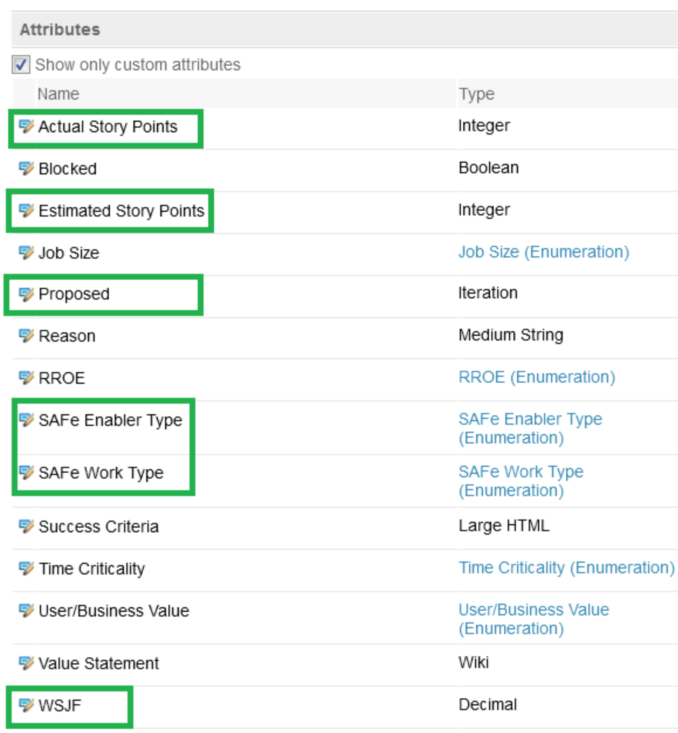
FEATURE

1. Select **Types and Attributes**.
2. Select *Feature*.
3. Scroll down to the **Attributes** section and locate the existing *WSJF* attribute. Click on the **Name** field to change the name to `WSJF (integer)`:



4. Add all of the attributes shown below that already exist on the *Program Epic* by clicking **Add…** for each one and specifying **Reuse Existing Attribute**. For example:

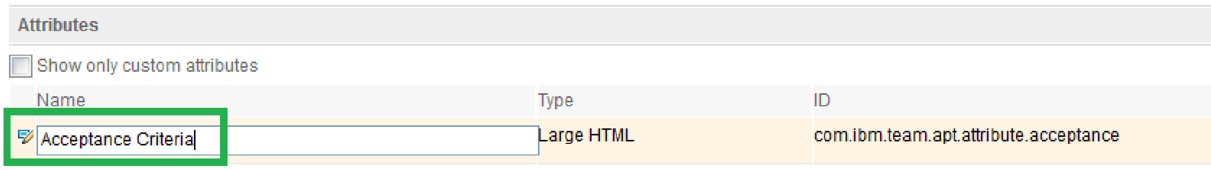



Attributes

Show only custom attributes

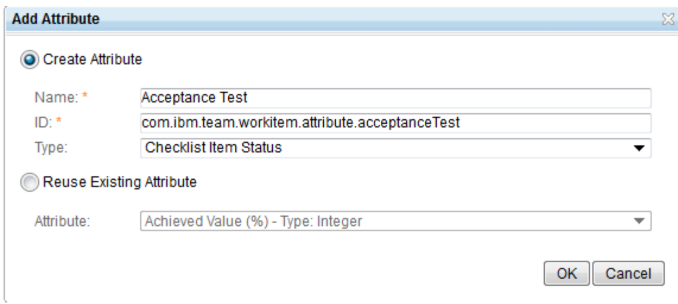
Name	Type
Actual Story Points	Integer
Blocked	Boolean
Estimated Story Points	Integer
Job Size	Job Size (Enumeration)
Proposed	Iteration
Reason	Medium String
RROE	RROE (Enumeration)
SAFe Enabler Type	SAFe Enabler Type (Enumeration)
SAFe Work Type	SAFe Work Type (Enumeration)
Success Criteria	Large HTML
Time Criticality	Time Criticality (Enumeration)
User/Business Value	User/Business Value (Enumeration)
Value Statement	Wiki
WSJF	Decimal

5. Select the existing *Acceptance Test* attribute and change the name to *Acceptance Criteria:*



6. Click **Add...** to add an *Acceptance Test* attribute and specify these details:

   Name: `Acceptance Test`
   ID: `com.ibm.team.workitem.attribute.acceptanceTest`
   Type: `Checklist Item Status`



7. Add the rest of the "done criteria" checklist item attributes by specifying these details for *Documentation, Performance Test, UX Design*:

   Name: `Documentation`
   ID: `com.ibm.team.workitem.attribute.documentation`
   Type: `Checklist Item Status`

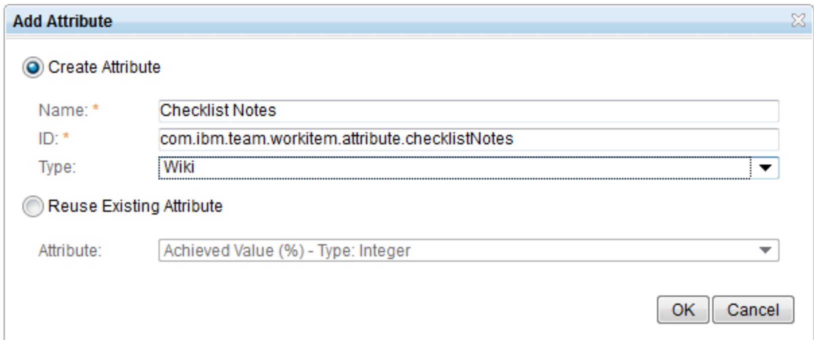
   Name: `Performance Test`
   ID: `com.ibm.team.workitem.attribute.performanceTest`
   Type: `Checklist Item Status`

   Name: `UX Design`
   ID: `com.ibm.team.workitem.attribute.uxDesign`
   Type: `Checklist Item Status`

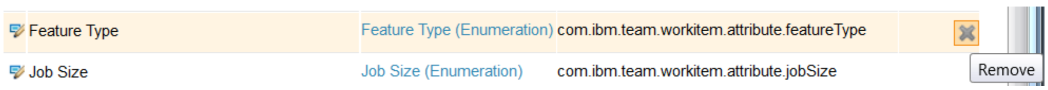
Feel free to add any "done criteria" attributes you would like to track in your organization.

8. Click **Add...** to add a *Checklist Notes* attribute and specify these details:

   Name: `Checklist Notes`
   ID: `com.ibm.team.workitem.attribute.checklistNotes`
   Type: `Wiki`

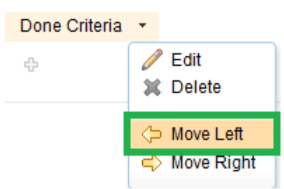


9. Remove the *Feature Type* attribute:

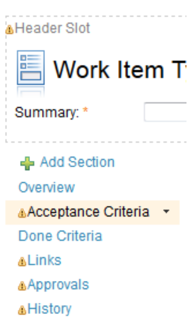


10. Save your changes.
11. Select **Editor Presentations**.
12. Select *com.ibm.team.editor.feature* in the **Choose the Editor Presentation to edit:** selection list.
13. Click the + under the *History* section to add a tab for *Done Criteria,* specifying the details provided below:

    Title: `Done Criteria`
    Layout: `Custom Attributes Layout`
    Create Tab ID: `com.ibm.team.tab.doneCriteria`
14. Use the *Move Left* option to move this new tab just after the *Acceptance* tab:



15. Select the *Acceptance* tab and edit it to change the name to *Acceptance Criteria*. Your tabs should now look like this:



16. Make sure the *Overview* section is selected, then click the + on the **Details** bar to add the following attributes, providing these details:

Attribute: `Estimated Story Points`
Kind: `Integer`

Attribute: `Actual Story Points`
Kind: `Integer`

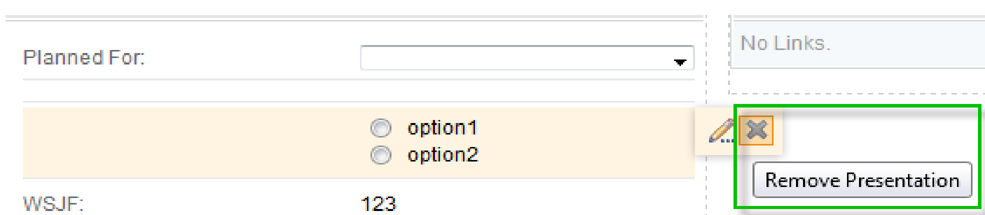
Attribute: `Proposed`
Kind: `Iteration`

Attribute: `WSJF`
Kind: `Decimal`

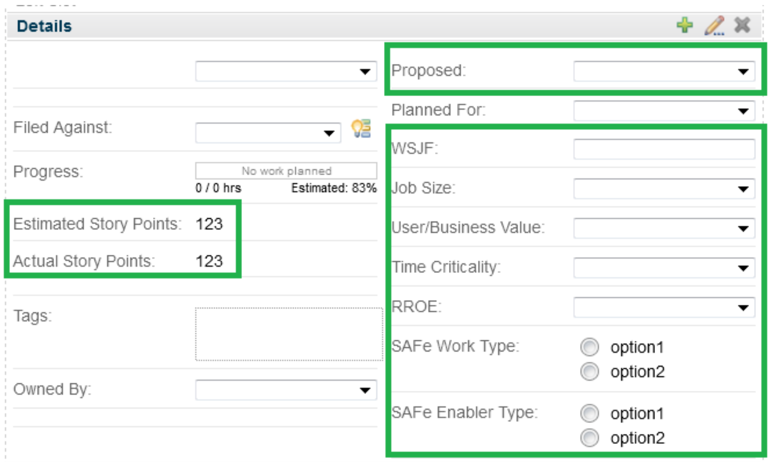
Attribute: `SAFe Work Type`
Kind: `Radio Group`

Attribute: `SAFe Enabler Type`
Kind: `Radio Group`

17. Make these changes to position the attributes:
    a. Drag and drop the WSJF above renamed WSJF (integer) attribute
    b. Select the **Remove Presentation** icon next to the original WSJF (integer) attribute to remove it
    c. Drag and drop the *Estimated Story Points* and *Actual Story Points* under the **Progress** attribute
    d. Drag and drop the *Proposed* attribute before the *Planned For* attribute
    e. Select the **Remove Presentation** icon next to the "empty" attribute because you deleted the Feature Type:

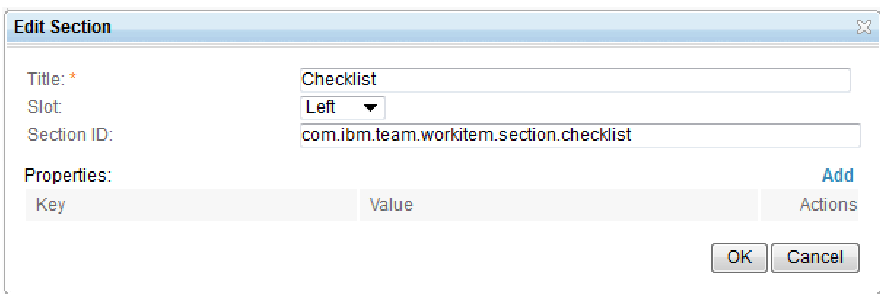


18. Your updated editor presentation should look like this:

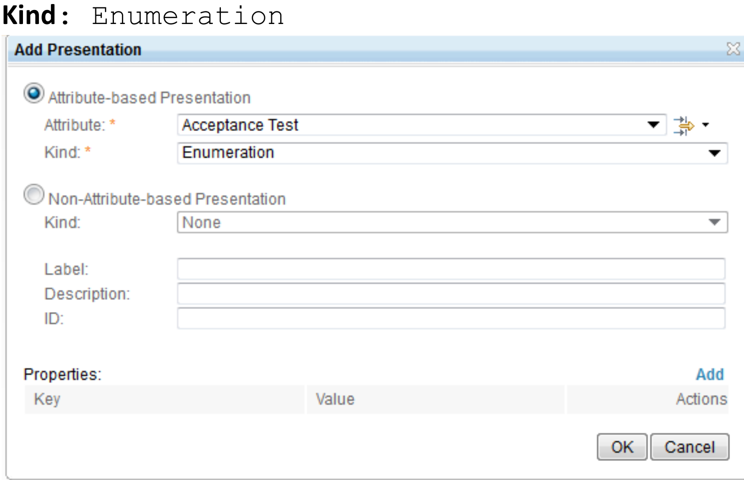


19. Select the *Done Criteria* tab and then the + **Add Section** to add a section:

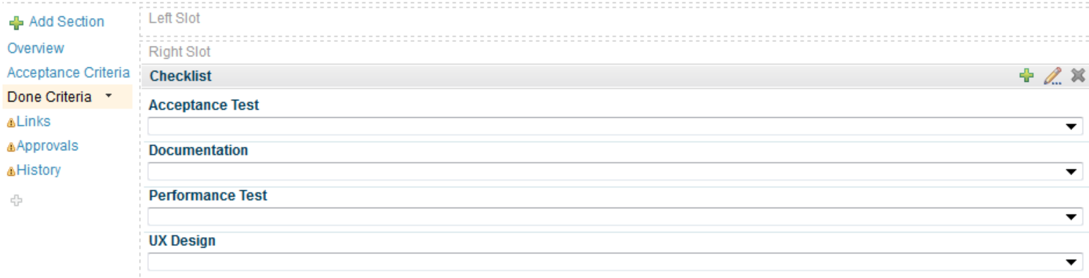
Title : `Checklist`
Slot : `Left`
Create Section ID : `com.ibm.team.workitem.section.checklist`



20. In the new **Checklist** section, click the + to add an attribute: Che
Attribute : `Acceptance Test`
Kind : `Enumeration`

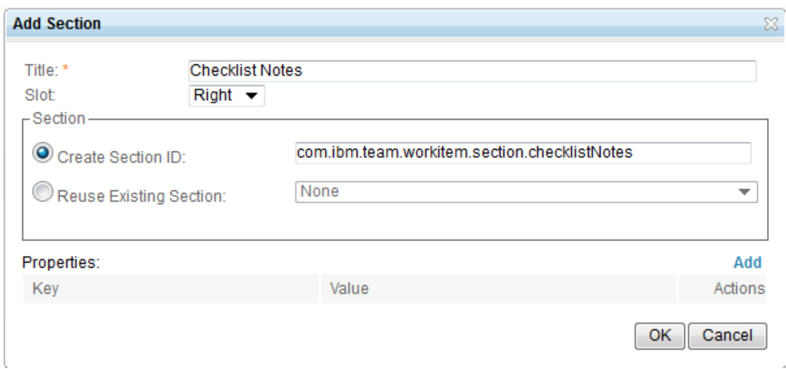


21. Repeat this process to add *Documentation, Performance Test,* and *UX Design.* Your **Done Criteria** tab should look like this:

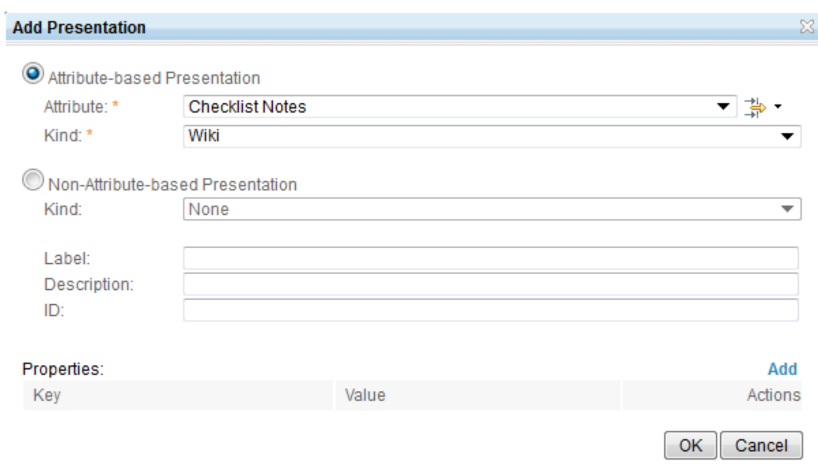


22. Click the **+ Add Section** to add another section:

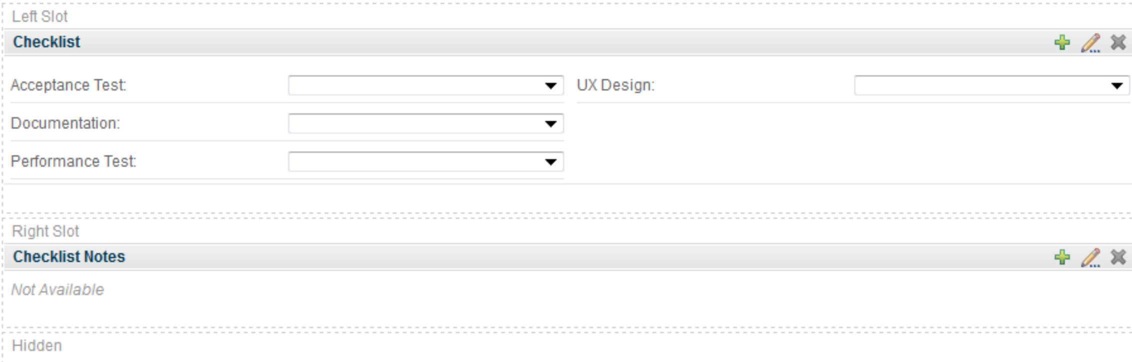
Title : `Checklist Notes`
Slot : `Right`
Create Section ID : `com.ibm.team.workitem.section.checklistNotes`



23. In the new **Checklist Notes** section, click the **+** to add an attribute:
Attribute : `Checklist Notes`
Kind : `Wiki`

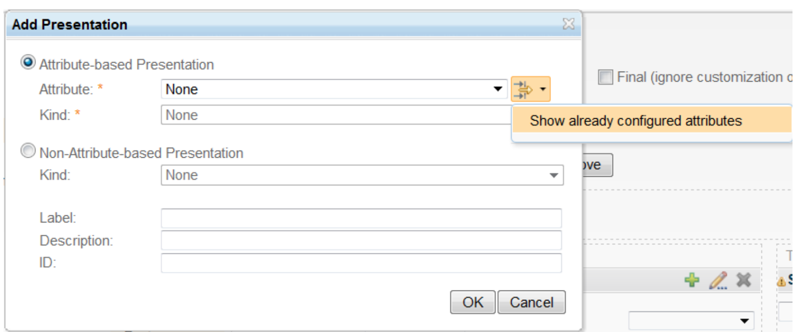


24. Your **Done Criteria** tab should look like this:

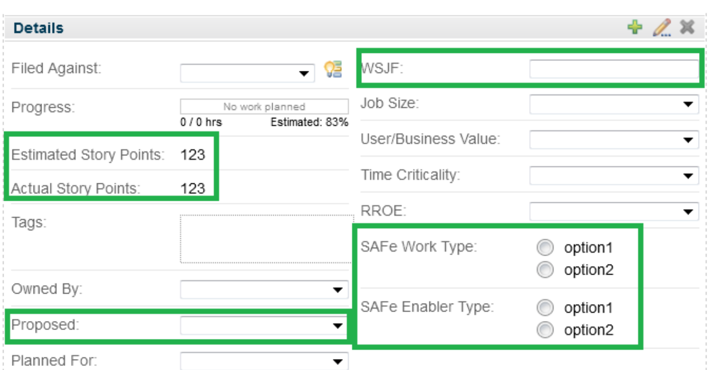


25. Save your changes.
26. Select the *com.ibm.team.apt.planPreview* editor presentation.
27. Select the **Feature** tab and add the *WSJF, SAFe Work Type, SAFe Enabler Type*, *Proposed, Planned For, Estimated Story Points* and *Actual Story Points* as you did above. Delete the WSJF (integer) attribute and the "empty" attribute left behind when you deleted the *Feature Type* attribute and move the *Estimated Story Points* and *Actual Story Points* below the *Progress* attribute.

    *Note: You will have to select **Show already configured attributes** to configure the new attributes in this section.*



28. Your presentation should look like this:

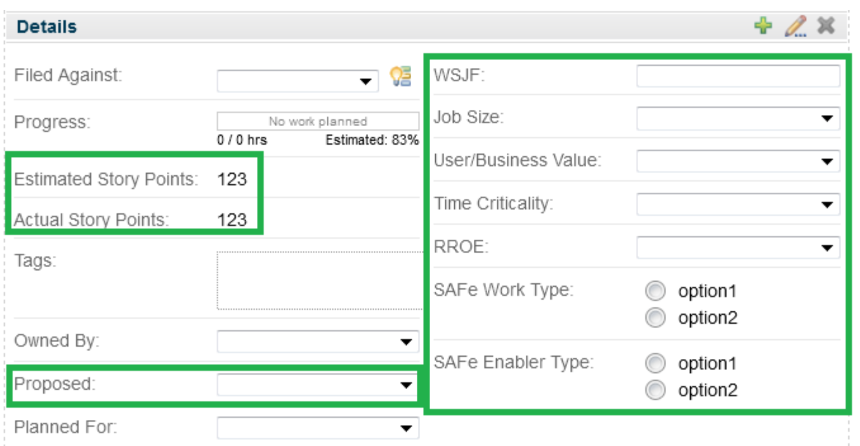


Note: If you are using the 6.0.1 versions of the templates, you will not have WSJF or its component attributes. Add them by following the instructions provided for the web.inline editor below.

29. Save your changes.

30. Select the *com.ibm.team.workitem.web.inline* editor presentation.
31. Select the **Feature** tab and add the *WSJF, Job Size, User/Business Value, Time Criticality, RROE, SAFe Work Type, SAFe Enabler Type, Estimated Story Points, Actual Story Points* and *Proposed* as you did above, specifying the following details:
    Attribute: `WSJF`, **Kind**: `Decimal`
    Attribute: `Job Size`, **Kind**: `Enumeration`
    Attribute: `User/Business Value`, **Kind**: `Enumeration`
    Attribute: `Time Criticality`, **Kind**: `Enumeration`
    Attribute: `RROE`, **Kind**: `Enumeration`
    Attribute: `SAFe Work Type`, **Kind**: `Radio Group`
    Attribute: `SAFe Enabler Type`, **Kind**: `Radio Group`
    Attribute: `Estimated Story Points`, **Kind**: `Integer`
    Attribute: `Actual Story Points`, **Kind**: `Integer`
    Attribute: `Proposed`, **Kind**: `Iteration`

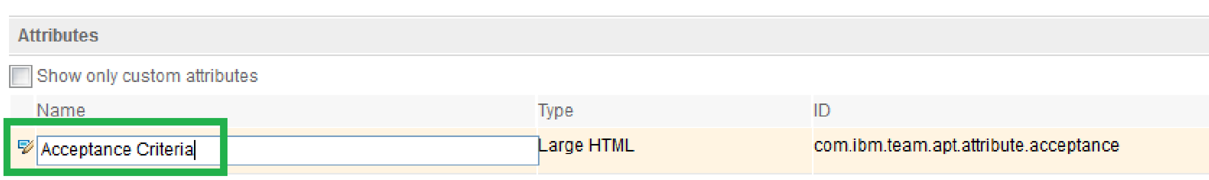
32. Delete the WSJF (integer) attribute and the "empty" attribute left behind when you deleted the *Epic Type* attribute. Your presentation should look like this:



33. Save your changes.

STORY

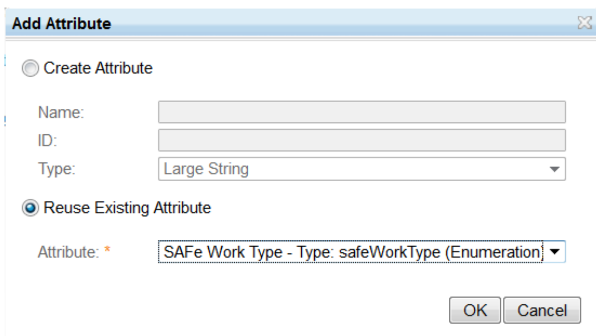
1. Select **Types and Attributes**.
2. Select *Story*.
3. Scroll down to the **Attributes** section.
4. Select the existing *Acceptance Test* attribute and change the name to *Acceptance Criteria:*

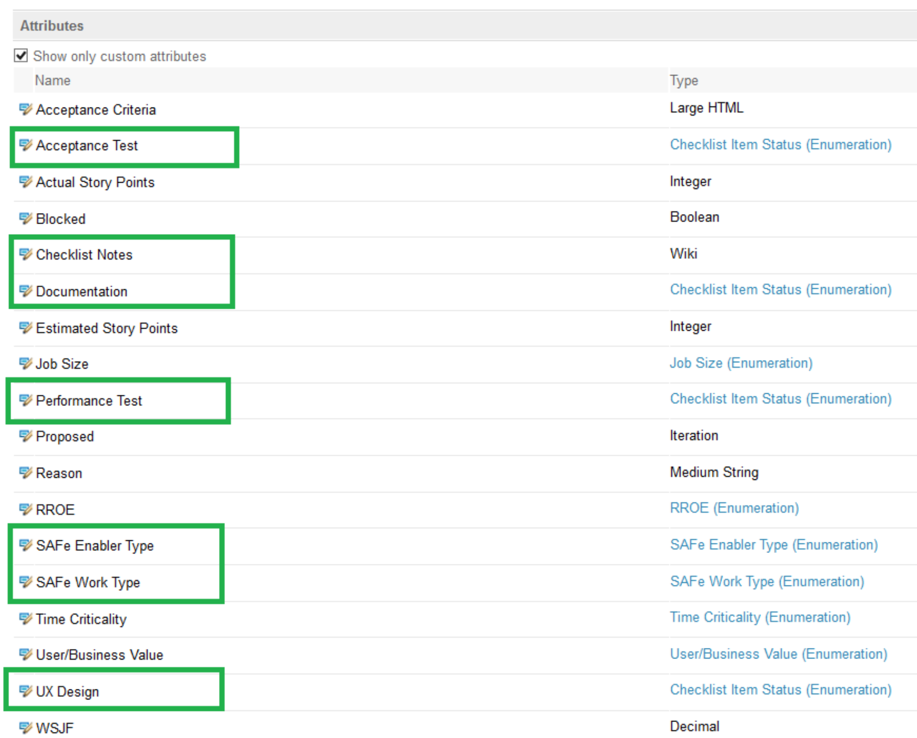


5. Click **Add…** to add a numeric *Story Points* attribute and specify these details:

   Name: `Story Points (numeric)`
   ID: `com.ibm.team.workitem.attribute.storyPointsNumeric`
   Type: `Integer`

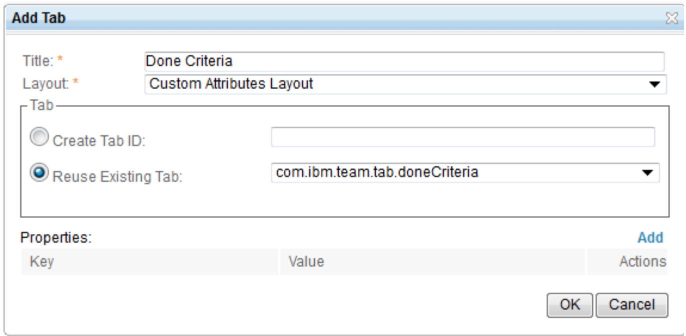
6. Add the attributes shown below that already exist in the *Feature* by clicking **Add…** for each one and specifying **Reuse Existing Attribute**. For example:



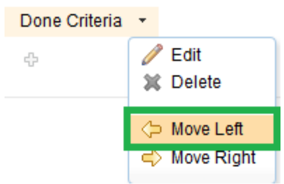


7. Save your changes.
8. Select **Editor Presentations**.
9. Select *com.ibm.team.apt.editor.story* in the **Choose the Editor Presentation to edit:** selection list.
10. Click the under the *History* section to add a tab for *Done Criteria,* specifying the details provided below:

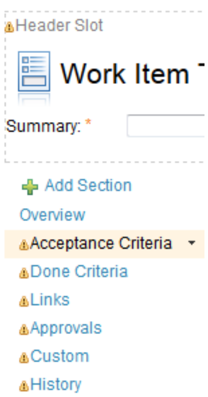
Title: `Done Criteria`
Layout: `Custom Attributes Layout`
Reuse Existing Tab: `com.ibm.team.tab.doneCriteria`



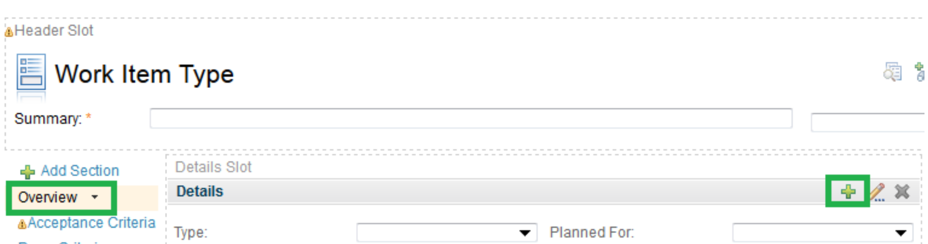
11. Use the *Move Left* option to move this new tab just after the *Acceptance* tab:



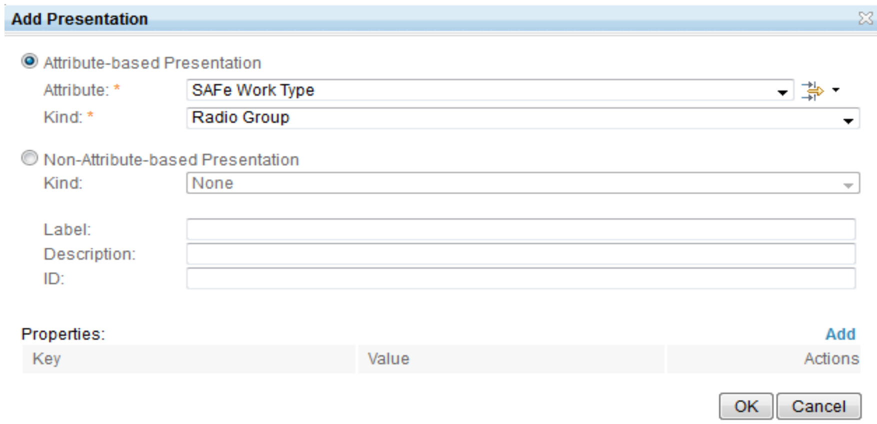
12. Select the *Acceptance* tab and edit it to change the name to *Acceptance Criteria*. Your tabs should now look like this:



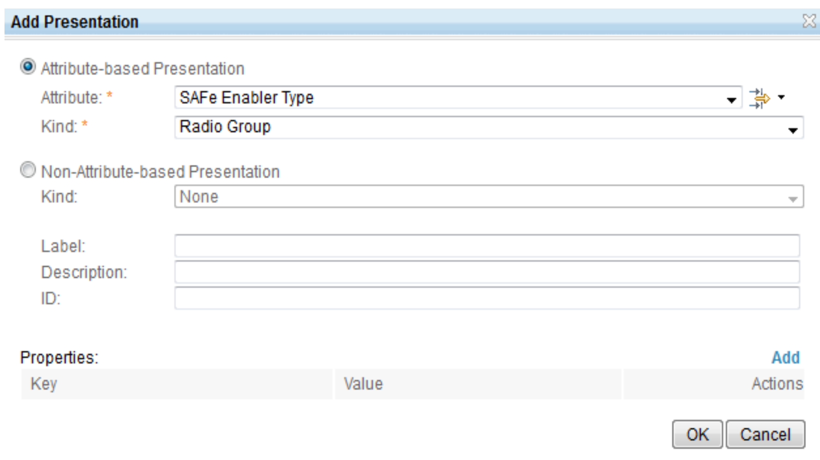
13. Select the *Overview* tab, then click the **+** on the **Details** bar:



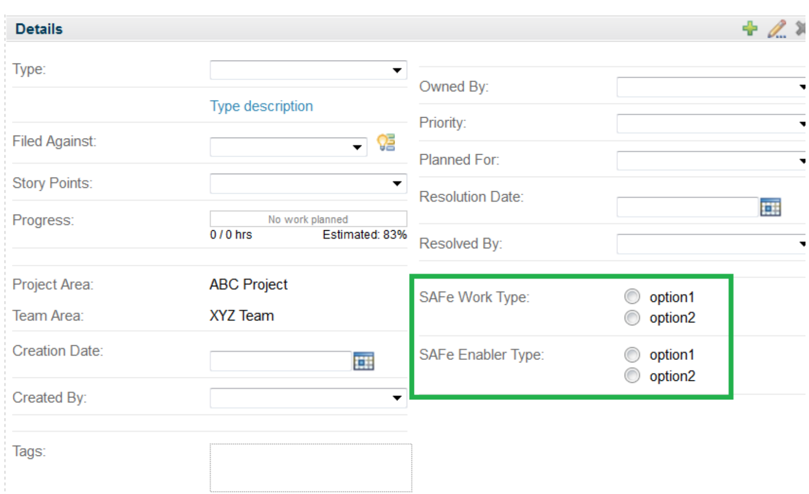
14. Select **Attribute-based Presentation**, *SAFe Work Type* and **Radio Group** for **Kind**.



15. Click the **+** on the **Details** bar and add *SAFe Enabler Type*.

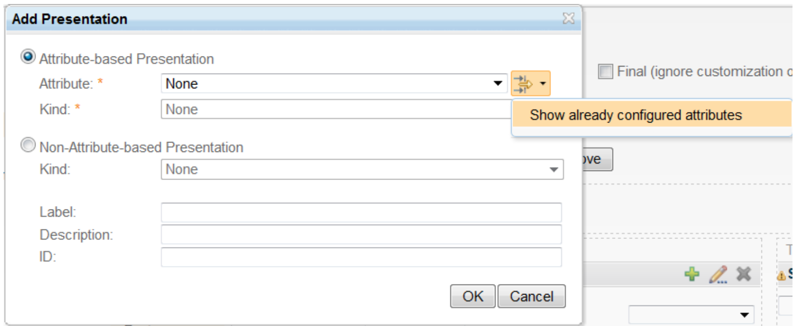


16. Your updated editor presentation should look like this:



17. Save your changes.
18. Select the *com.ibm.team.apt.planPreview* editor presentation.
19. Select the **Story** tab and add the *SAFe Work Type* and *SAFe Enabler Type* as you did above.

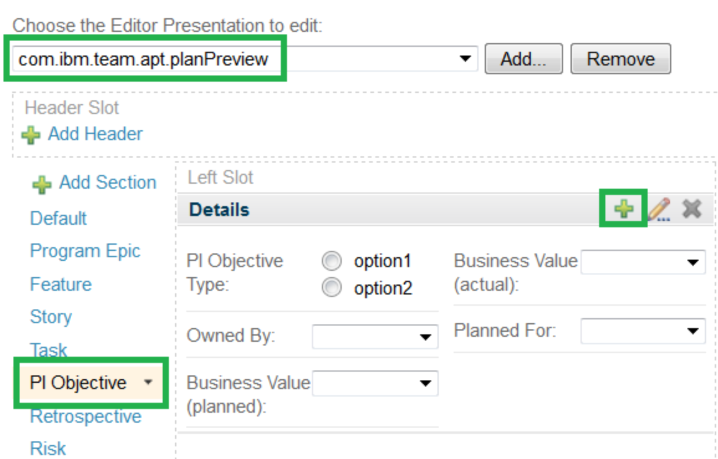
    *Note: You will have to select **Show already configured attributes** to configure the new attributes in this section.*



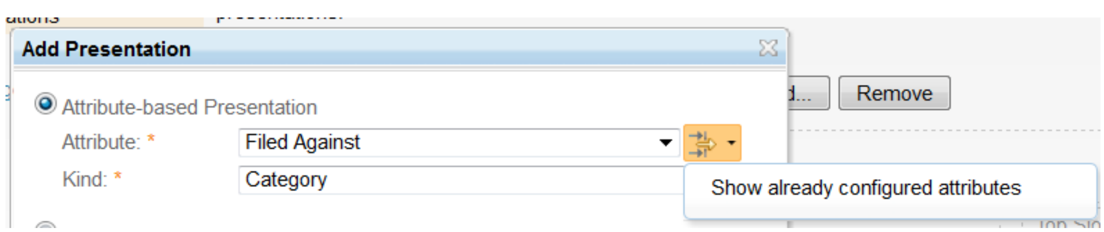
20. Save your changes.
21. Select the *com.ibm.team.workitem.web.inline* editor presentation.
22. Select the **Story** tab and add the *SAFe Work Type* and *SAFe Enabler Type* as you did above.
23. Save your changes.

PI OBJECTIVE

1. Select **Editor Presentations**, then select the **com.ibm.team.apt.planPreview** presentation.
2. With **PI Objective** selected, click the **+** in the Details header to add a new presentation:



3. Add the **Filed Against** attribute (you will need to select *Show already configured attributes*):



4. Repeat this process to add the **Filed Against** attribute in the **com.ibm.team.workitem.web.inline PI Objective** editor presentation.
5. Save your changes.
6. Click **Workflows** and then select *PI Objective Workflow*.
7. Update the **States**, **Groups** and **Icons** so that they look like this, using the **Add…** option to add the new *Reviewed* state and clicking on the **Name** and **Icon** fields to change the others:

States

Configure the States for this Workflow. For each State, set the order in which Actions will appear th

Icon	Name	Group	Show Resolution	Description
	New	New	☐	Click to add description
	Reviewed	In Progress	☐	PI Objective that has been reviewed and determined valid. At this point a Business Value (planned) is set.
	Done	Closed	☐	PI Objective has been verified and determined to be complete. At this point, Business Value (actual) is set.
	Invalid	Invalid	☐	The PI Objective is deemed invalid at this point.

If you don't have all of these specific icons, choose something you have that makes sense.

8. Update the **Actions**, **Target States** and **Icons,** using the **Add…** option to add the new *Reviewed* action and clicking on the **Name** and **Icon** fields to change the others:

Actions

Configure the Actions for this Workflow. For eac appear.

Icon	Name	Target State
	Reopen	New
	Verify	Done
	Reviewed	Reviewed
	Invalidate	Invalid
	Initialize	New

9. Ensure the **Start Action**, **Resolve Action**, **Reopen Action** and **Transitions** in the **Transitions** section are specified as below:

Start Action: *	Initialize	Resolve Action:	Verify	Reopen Action:	Reopen
Duplicate Resolution:	None				

Transitions

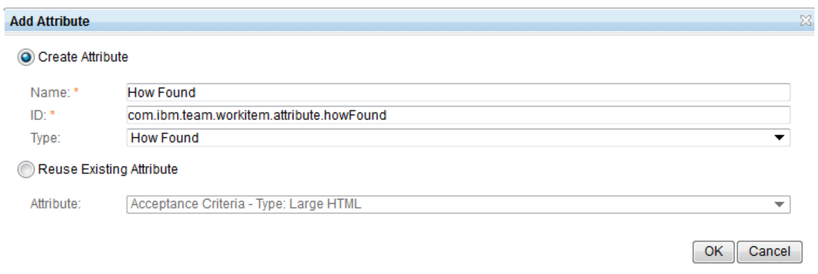
From	To New	Reviewed	Done	Invalid
New	<None>	Reviewed	None	Invalidate
Reviewed	Reopen	<None>	Verify	Invalidate
Done	Reopen	None	<None>	None
Invalid	Reopen	None	None	<None>

10. Save your changes.

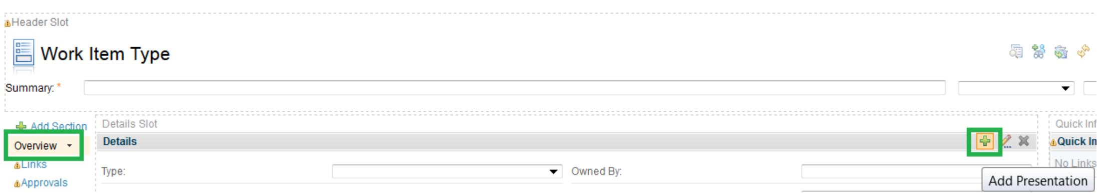
DEFECT

4. Select **Types and Attributes**.
5. Select *Defect.*
6. Scroll down to the **Attributes** section and click **Add...** to add the *How Found* attribute.
7. Specify these details:

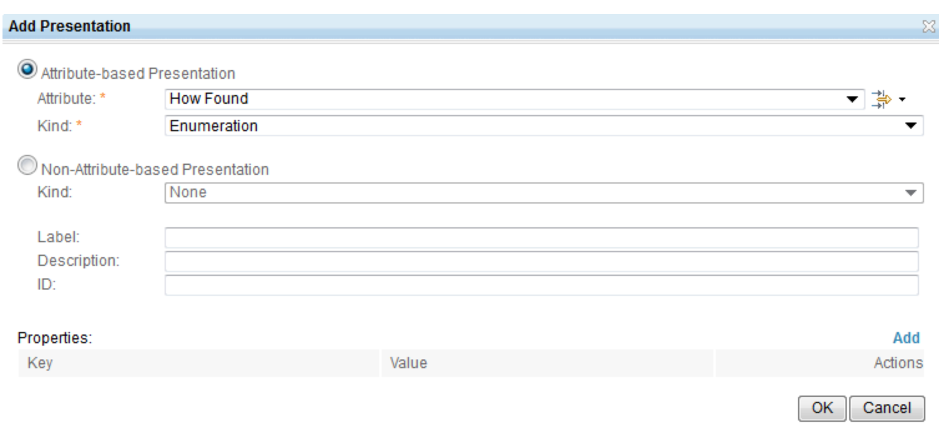
   Name: `How Found`
   ID: `com.ibm.team.workitem.attribute.howFound`
   Type: `How Found`



8. Save your changes.
9. Select **Editor Presentations**.
10. Select *com.ibm.team.workitem.editor.default* in the **Choose the Editor Presentation to edit:** selection list.
11. Select the *Overview* tab, then click the **+** on the **Details** bar:

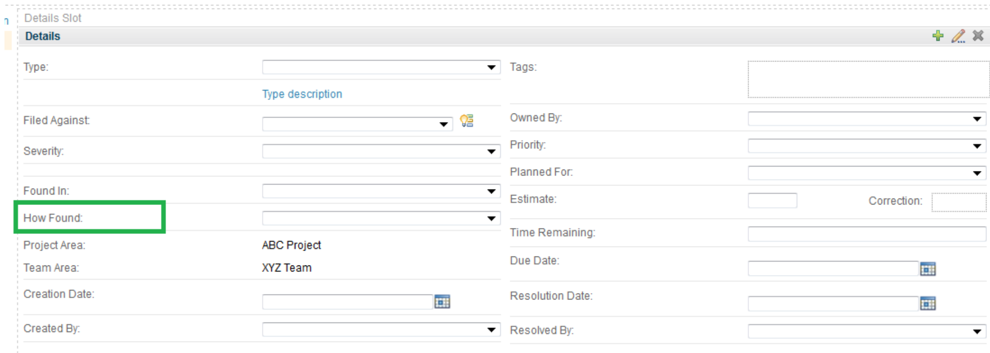


12. Select **Attribute-based Presentation**, *How Found* and **Enumeration** for **Kind**.

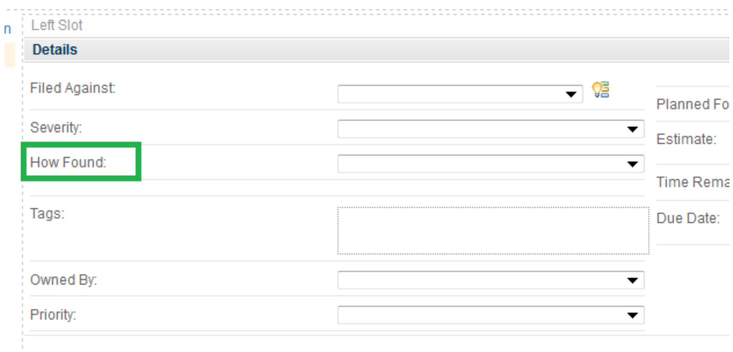


Drag the new attribute just below the *Found In* attribute.

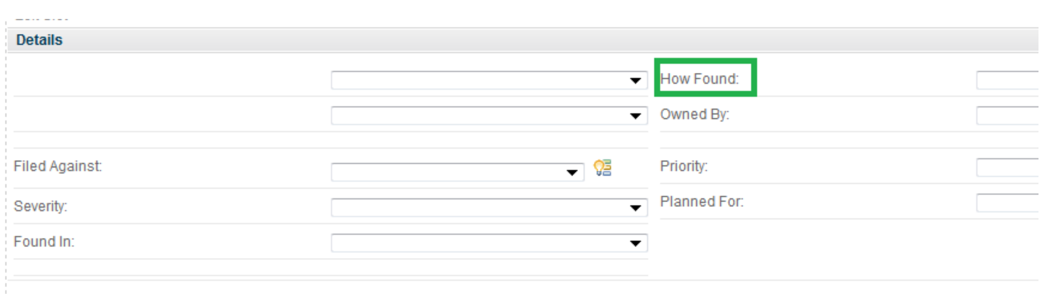
13. Your updated editor presentation should look like this:



14. Save your changes.
15. Select the *com.ibm.team.apt.planPreview* editor presentation.
16. Select the **Default** tab and add the *How Found* attribute as you did above. Your presentation should look like this:



17. Save your changes.
18. Select the *com.ibm.team.workitem.web.inline* editor presentation.
19. Select the **Default** tab and add the *How Found* attribute as you did above. Your presentation should look like this

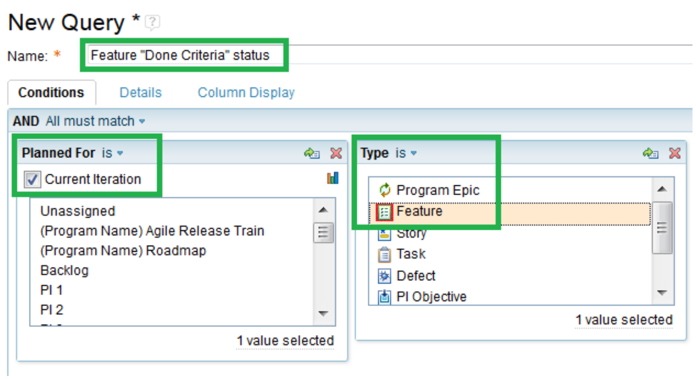


20. Save your changes.

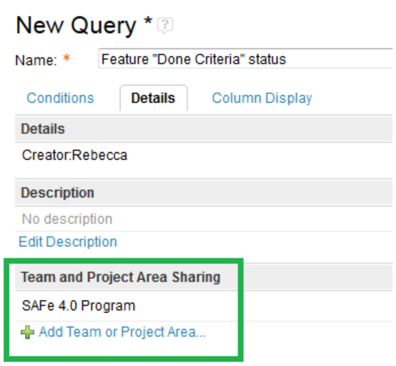
QUERIES

In this section you will create new queries to support additions in SAFe 4.0.

1. In the top right of the **Appliation Administration – Change and Configuration Management (CCM)**, select the *Explore Project* link.
2. Create a new Work Item query by selecting **Work Items > Create Query** in the menu bar.
3. Name your new query `Feature "Done Criteria" Status` and add conditions as shown below:



4. Click *Details* and then **+Add Team or Project Area…** to share your query:



5. Repeat these steps to create the `Story "Done Criteria" Status` query.
6. Save your changes. Later you will add this to the **Predefined queries** in the Eclipse client and add a dashboard widget to display the results of this query.

SAFE V4.0 PROCESS TEMPLATE CONFIGURATIONS (ECLIPSE)

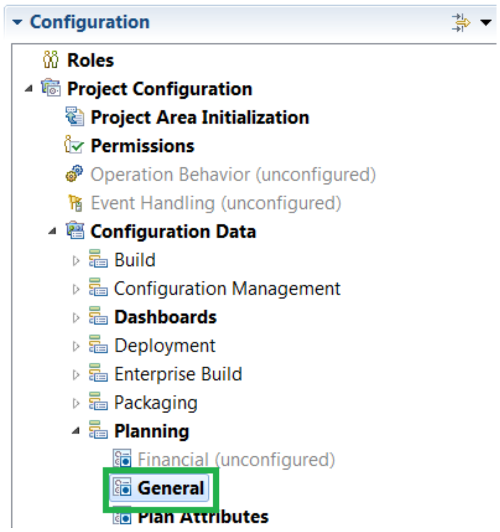
The next set of changes must be performed in the Eclipse client.

1. Launch RTC in the Eclipse client and establish a Repository Connection.
2. Right-click on the Repository Connection, choose **Managed Connected Project Areas** and select the **My SAFe V4.0 Program** and **My SAFe V4.0 Portfolio** project areas.

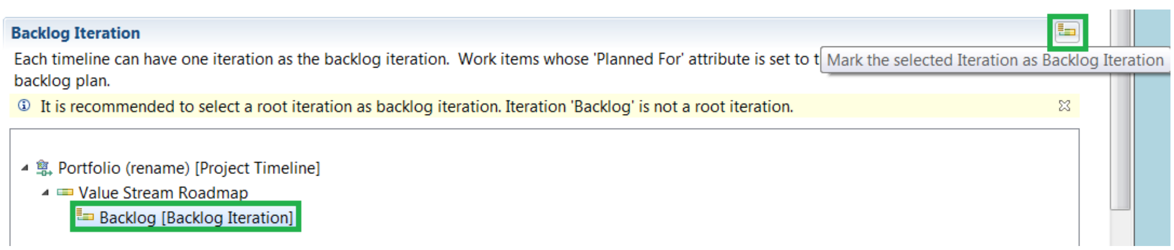
TIMELINES

In this section, you designate the Backlog iteration that you created earlier on both the Portfolio and Program timelines as RTC's **Backlog Iteration**. Perform these steps in each project area.

1. Right-click to open the **My SAFe V4.0 Portfolio** project area.
2. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Planning > General* in the **Configuration** box on the left:



3. In the *Backlog Iteration* box, expand the Portfolio timeline to expose the Backlog iteration.
4. With the Backlog iteration selected, make it the designated backlog iteration by clicking the icon in the top right corner:



Ignore the warning.

5. Save your changes.
6. Right-click to open the **My SAFe V4.0 Program** project area and repeat these steps.

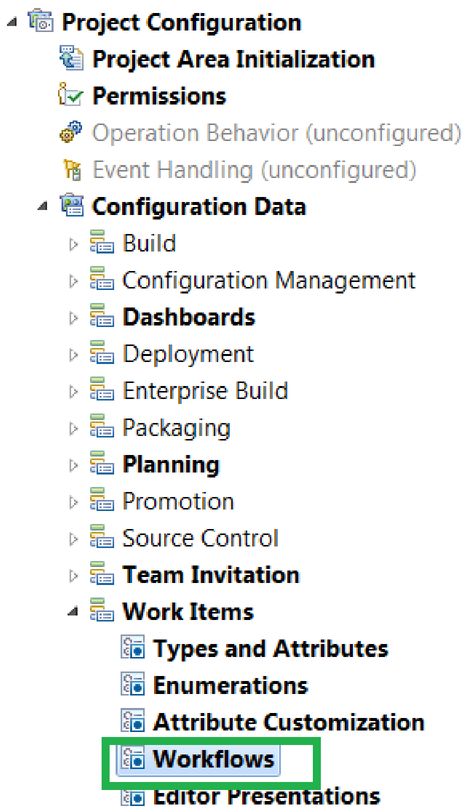
Work Item Workflow

In this section, you update the Kanban workflows to be consistent with the SAFe V4.0 specifications.

PORTFOLIO EPIC WORKFLOW

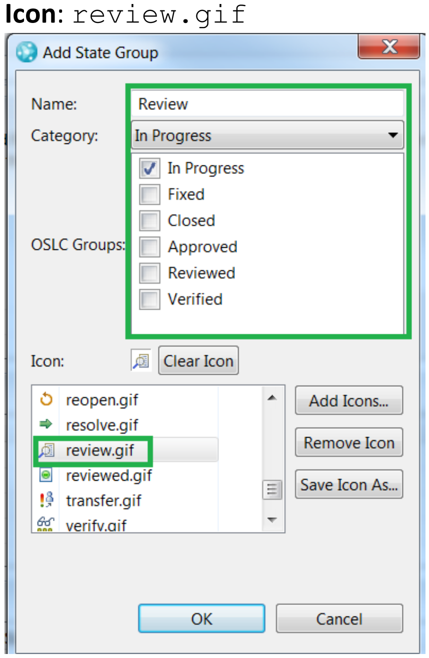
The Portfolio Kanban in SAFe V4.0 involves five “queues”: *Funnel, Review*, *Analysis, Backlog*, and *Implementation*.

1. Right-click to open the **My SAFe V4.0 Portfolio** project area.
2. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Work Items > Workflows* in the **Configuration** box on the left:



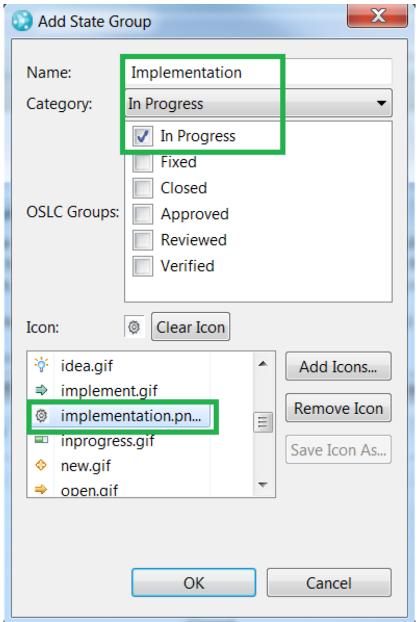
3. Select *Portfolio Epic Workflow* in the **Choose the Workflow to Edit:** selection list.
4. Scroll to the **State Groups** section at the bottom. Click **Add…** to add a new *Review* State Group. Specify these details:

   Name: `Review`
   Category: `In Progress`
   OSLC Groups: `In Progress`
   Icon: `review.gif`



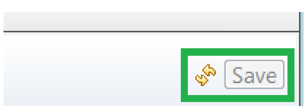
5. Repeat this process to add a new *Implementation* State Group. Specify these details:

   Name: `Implementation`
   Category: `In Progress`
   OSLC Groups: `In Progress`
   Icon: `implementation.png`

   Note: The Kanban plan view is sensitive to the order of State Groups. Because this dialog does not allow you to change the State Group order, you must do that in the process configuration XML. We will do that as the next step in this section.

6. Save your changes and Refresh using the **Save** and **Refresh** actions in the top right:

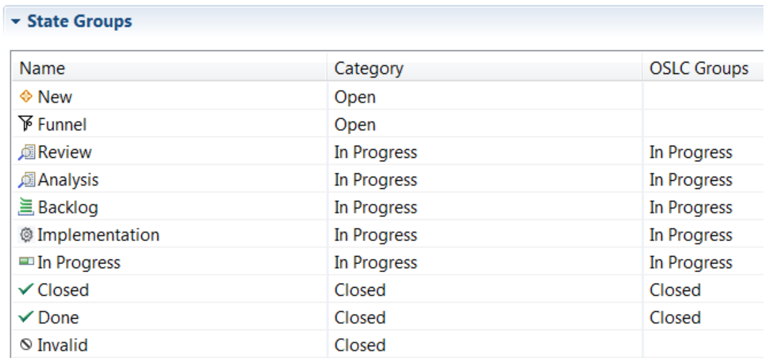
   

7. Click the **Process Configuration Source** tab and search for `stateGroupDefinition`. In the source, make the following changes:
   a. Move the *Review* state group to just after the *Funnel* state group
   b. Move the *Implementation* state group to just after the *Backlog* state group
   c. Change the **id** of the *Review* state group to `review`
   d. Change the **id** of the *Implementation* state group to `Implementation`

   You're updated **stateGroupDefinition** section should look like this:

```
<stateGroupDefinition category="open" icon="processattachment:/workflow/new.gif" id="open" name="New"/>
<stateGroupDefinition category="open" icon="processattachment:/workflow/funnel.png" id="funnel" name="Funnel"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/review.gif" id="review" name="Review" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/analysis.gif" id="analysis" name="Analysis" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/backlog.gif" id="backlog" name="Backlog" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/implementation.png" id="implementation" name="Implementation" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/inprogress.gif" id="inprogress" name="In Progress" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/close.gif" id="closed" name="Closed" oslcGroup="oslc-closed"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/close.gif" id="done" name="Done" oslcGroup="oslc-closed"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/reject.gif" id="invalid" name="Invalid"/>
```

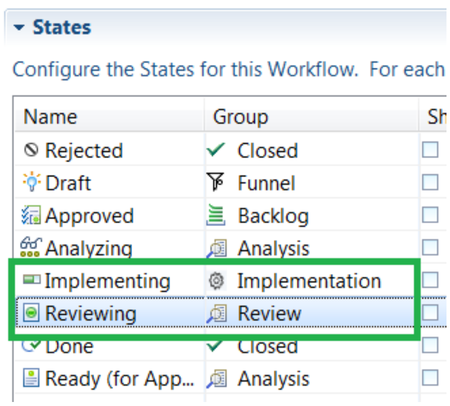
8. Save your changes and return to the **Process Configuration** tab. Notice that the order of **State Groups** has been been changed:



State Groups

Name	Category	OSLC Groups
New	Open	
Funnel	Open	
Review	In Progress	In Progress
Analysis	In Progress	In Progress
Backlog	In Progress	In Progress
Implementation	In Progress	In Progress
In Progress	In Progress	In Progress
Closed	Closed	Closed
Done	Closed	Closed
Invalid	Closed	

9. Scroll to the **States** section and make the following changes:
    a. Change *Reviewed* to *Reviewing* and change the the State Group to *Review*
    b. Change the *Implementing* state group to *Implementation*

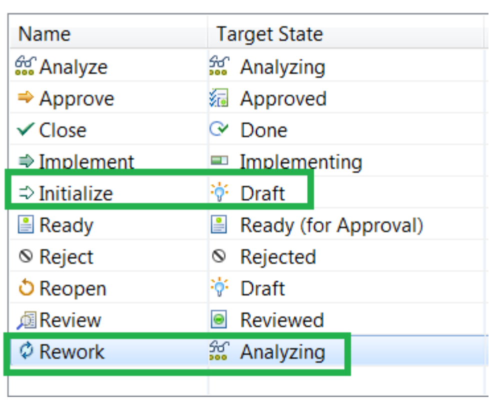


States

Configure the States for this Workflow. For each

Name	Group	Sh
Rejected	Closed	☐
Draft	Funnel	☐
Approved	Backlog	☐
Analyzing	Analysis	☐
Implementing	Implementation	☐
Reviewing	Review	☐
Done	Closed	☐
Ready (for App...	Analysis	☐

10. Save your changes and Refresh.
11. Scroll to the **Actions** section and make the following changes:
    a. Change *New* to *Initialize*
    b. Delete and re-add the *Rework* action with a target state of *Analyzing*



Name	Target State
Analyze	Analyzing
Approve	Approved
Close	Done
Implement	Implementing
Initialize	Draft
Ready	Ready (for Approval)
Reject	Rejected
Reopen	Draft
Review	Reviewed
Rework	Analyzing

12. Save your changes and Refresh.
13. Scroll to the **Transitions** section and ensure the transitions reflect what is shown below:

Start action: Initialize | Resolve action: Close | Reopen action: Reopen

Transitions

From \ To	Rejected	Draft	Approved	Analyzing	Implementing	Reviewing	Done	Ready (for Approval)
Rejected	<None>	Reopen	None	None	None	None	None	None
Draft	Reject	<None>	None	None	None	Review	None	None
Approved	Reject	None	<None>	Rework	Implement	Review	None	Ready
Analyzing	Reject	Reopen	None	<None>	None	Review	None	Ready
Implementing	Reject	Reopen	None	Rework	<None>	None	Close	None
Reviewing	Reject	Reopen	None	Analyze	None	<None>	None	None
Done	None	Reopen	None	None	None	None	<None>	None
Ready (for Approval)	Reject	None	Approve	Rework	None	Review	None	<None>

14. Save your changes and Refresh.

VALUE STREAM EPIC WORKFLOW

In SAFe V4.0, the Value Stream Epic Kanban involves three "queues": *Funnel, Review*, and *Analysis*.

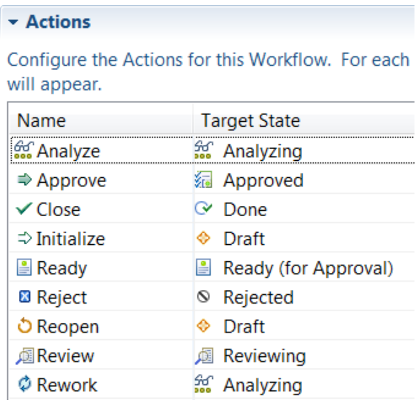
1. Select *Value Stream Epic Workflow* in the **Choose the Workflow to Edit:** selection list.
2. Scroll to the **States** section and add *Rejected, Approved, Analyzing, Reviewing* and *Ready (for Approval)* states, as shown below:

States

Configure the States for this Workflow. Fo

Name	Group
Draft	Funnel
Done	Closed
Rejected	Closed
Approved	Analysis
Analyzing	Analysis
Reviewing	Review
Ready (for Approval)	Analysis

3. Save your changes and Refresh.
4. Scroll to the **Actions** section and add *Analyze, Approve, Ready, Reject, Reopen, Review* and *Rework* actions, as shown below:

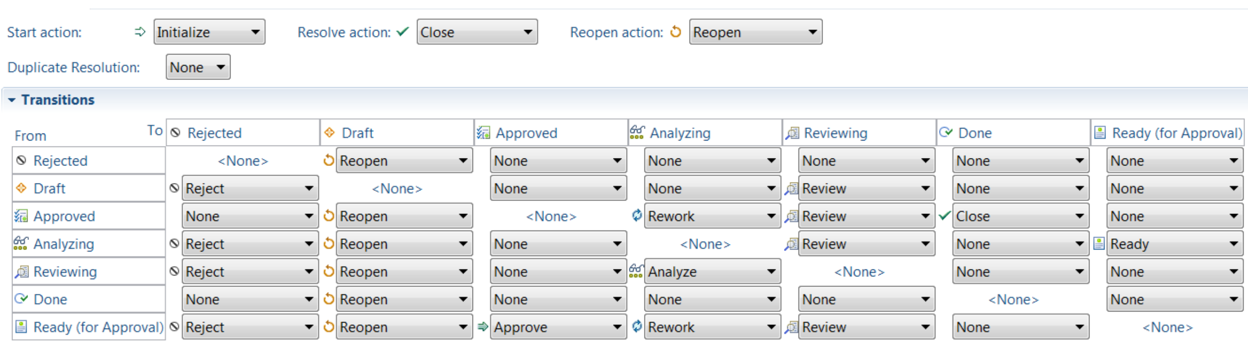


Actions

Configure the Actions for this Workflow. For each will appear.

Name	Target State
Analyze	Analyzing
Approve	Approved
Close	Done
Initialize	Draft
Ready	Ready (for Approval)
Reject	Rejected
Reopen	Draft
Review	Reviewing
Rework	Analyzing

5. Save your changes and Refresh.
6. Scroll to the **Transitions** section and ensure the transitions reflect what is shown below:



Start action: Initialize Resolve action: Close Reopen action: Reopen

Duplicate Resolution: None

Transitions

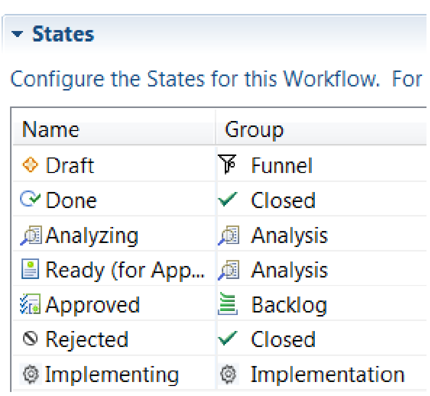
From \ To	Rejected	Draft	Approved	Analyzing	Reviewing	Done	Ready (for Approval)
Rejected	<None>	Reopen	None	None	None	None	None
Draft	Reject	<None>	None	None	Review	None	None
Approved	None	Reopen	<None>	Rework	Review	Close	None
Analyzing	Reject	Reopen	None	<None>	Review	None	Ready
Reviewing	Reject	Reopen	None	Analyze	<None>	None	None
Done	None	Reopen	None	None	None	<None>	None
Ready (for Approval)	Reject	Reopen	Approve	Rework	Review	None	<None>

7. Save your changes and Refresh.

CAPABILITY WORKFLOW

In SAFe V4.0, the Capability Kanban involves four "queues": *Funnel, Analysis*, *Backlog,* and *Implementation*. At every PI boundary, the top Capabilities (ranked by WSJF) are pulled from the Backlog queue for implementation.

1. Select *Capability Workflow* in the **Choose the Workflow to Edit:** selection list.
2. Scroll to the **States** section and add *Analyzing, Ready (for Approval), Approved, Rejected* and *Implementing,* as shown below:



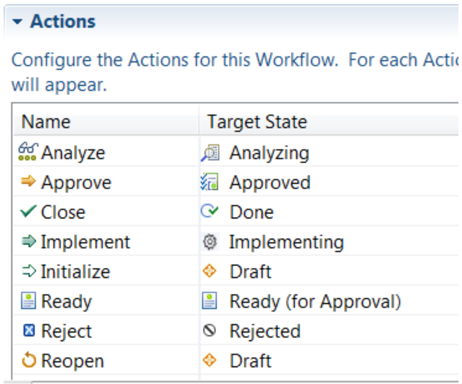
States

Configure the States for this Workflow. For

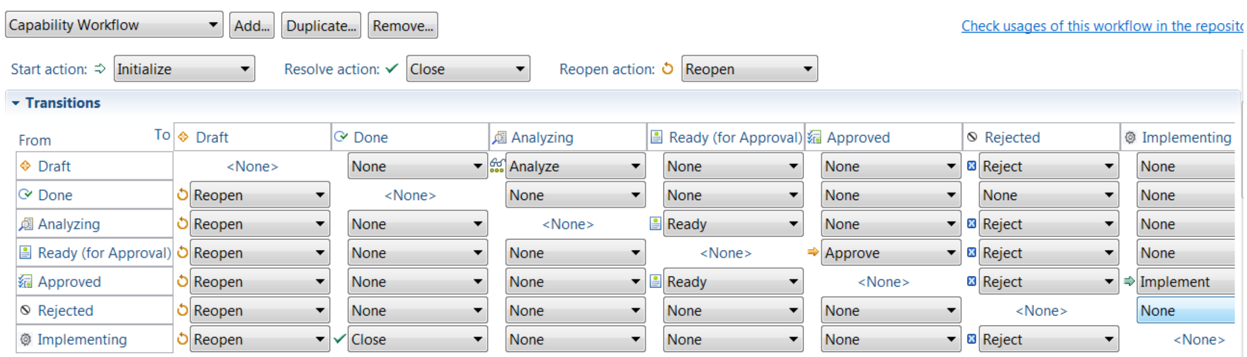
Name	Group
Draft	Funnel
Done	Closed
Analyzing	Analysis
Ready (for App...	Analysis
Approved	Backlog
Rejected	Closed
Implementing	Implementation

3. Save your changes and Refresh.

4. Scroll to the **Actions** section and add *Analyze, Approve, Implement, Ready, Reject* and *Reopen,* as shown below:



5. Save your changes and Refresh.
6. Scroll to **Transitions** and make the following updates so that your workflow transitions reflect this configuration:

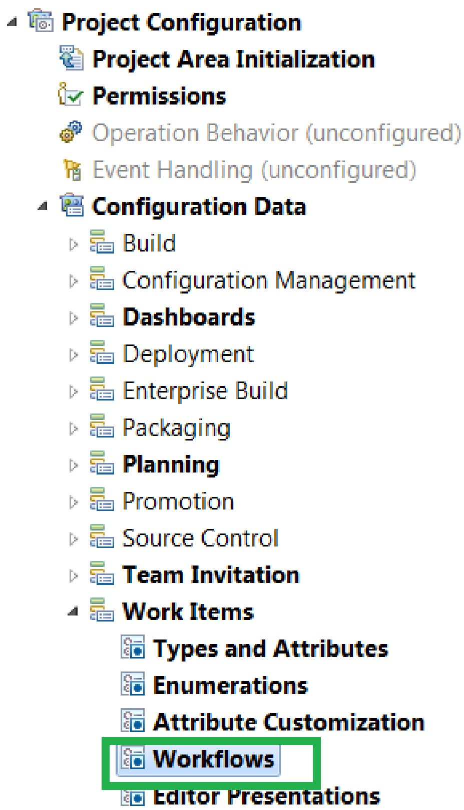


7. Save your changes.

PROGRAM EPIC WORKFLOW

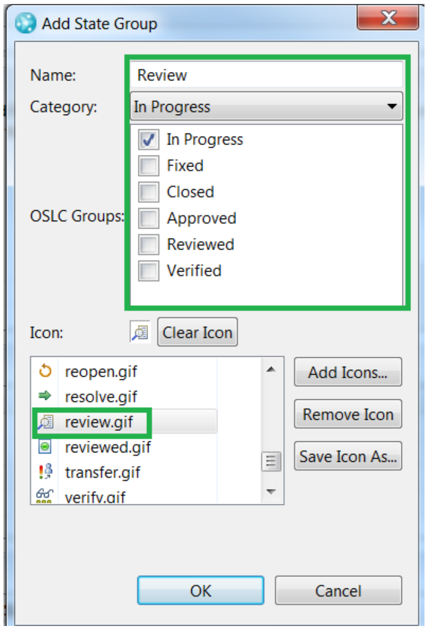
In SAFe V4.0, the Program Epic Kanban is precisely the same as the Value Stream Epic Kanban. You make the same changes here as you did in the **Value Stream Epic Workflow** section above.

1. Right-click to open the **My SAFe V4.0 Program** project area.
2. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Work Items > Workflows* in the **Configuration** box on the left:



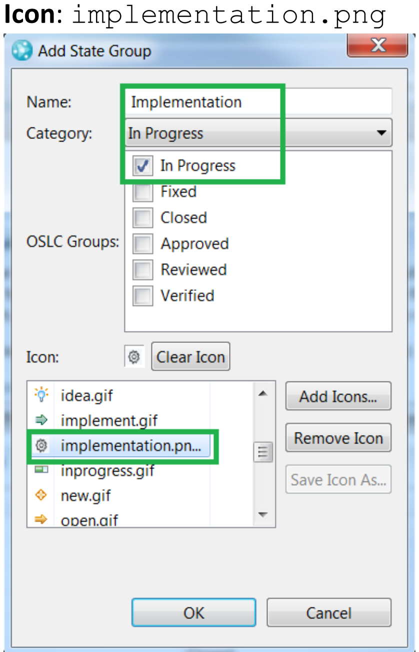
3. Select *Program Epic Workflow* in the **Choose the Workflow to Edit:** selection list.
4. Scroll to the **State Groups** section at the bottom. Click **Add…** to add a new *Review* State Group. Specify these details:

   Name: `Review`
   Category: `In Progress`
   OSLC Groups: `In Progress`
   Icon: `review.gif`



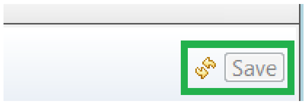
5. Repeat this process to add a new *Implementation* State Group. Specify these details:

   Name: `Implementation`
   Category: `In Progress`
   OSLC Groups: `In Progress`
   Icon: `implementation.png`



   Note: The Kanban plan view is sensitive to the order of State Groups. Because this dialog does not allow you to change the State Group order, you must do that in the process configuration XML. We will do that as the next step in this section.

6. Save your changes and Refresh using the **Save** and **Refresh** actions in the top right:



7. Click the **Process Configuration Source** tab and search for `stateGroupDefinition`. In the source, make the following changes:
    a. Move the *Review* state group to just after the *Funnel* state group
    b. Move the *Implementation* state group to just after the *Backlog* state group
    c. Change the **id** of the *Review* state group to `review`
    d. Change the **id** of the *Implementation* state group to `Implementation`

    You're updated **stateGroupDefinition** section should look like this:

```
<stateGroupDefinition category="open" icon="processattachment:/workflow/new.gif" id="open" name="New"/>
<stateGroupDefinition category="open" icon="processattachment:/workflow/funnel.png" id="funnel" name="Funnel"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/review.gif" id="review" name="Review" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/analysis.gif" id="analysis" name="Analysis" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/backlog.gif" id="backlog" name="Backlog" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/implementation.png" id="implementation" name="Implementation" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="inprogress" icon="processattachment:/workflow/inprogress.gif" id="inprogress" name="In Progress" oslcGroup="oslc-inprogress"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/close.gif" id="done" name="Done" oslcGroup="oslc-closed"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/reject.gif" id="invalid" name="Invalid"/>
<stateGroupDefinition category="closed" icon="processattachment:/workflow/close.gif" id="closed" name="Closed" oslcGroup="oslc-closed"/>
```

8. Save your changes and return to the **Process Configuration** tab. Notice that the order of **State Groups** has been been changed:

State Groups

Name	Category	OSLC Groups
New	Open	
Funnel	Open	
Review	In Progress	In Progress
Analysis	In Progress	In Progress
Backlog	In Progress	In Progress
Implementation	In Progress	In Progress
In Progress	In Progress	In Progress
Done	Closed	Closed
Invalid	Closed	
Closed	Closed	Closed

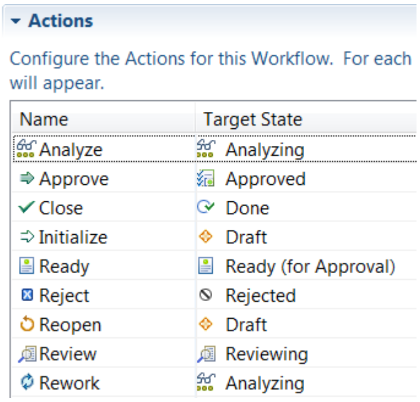
9. Scroll to the **States** section and update it as shown below:

States

Configure the States for this Workflow. Fo

Name	Group
Draft	Funnel
Done	Closed
Rejected	Closed
Approved	Analysis
Analyzing	Analysis
Reviewing	Review
Ready (for Approval)	Analysis

10. Save your changes and Refresh.
11. Scroll to the **Actions** section and update them as shown below:

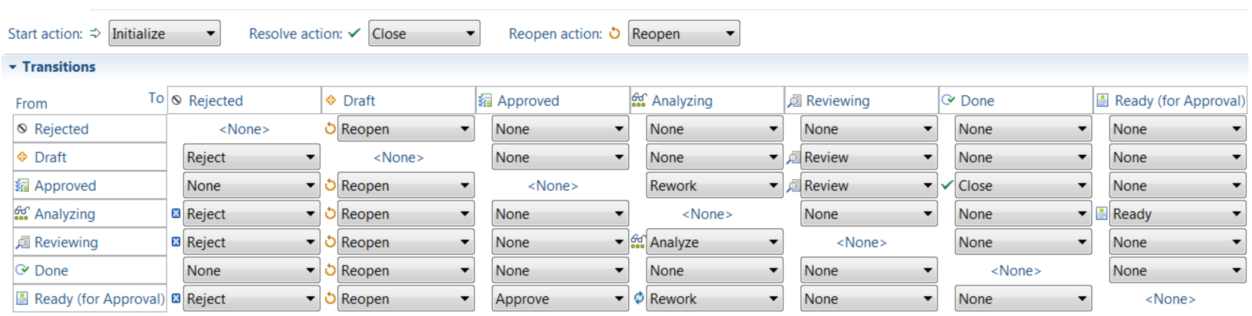


Actions

Configure the Actions for this Workflow. For each will appear.

Name	Target State
Analyze	Analyzing
Approve	Approved
Close	Done
Initialize	Draft
Ready	Ready (for Approval)
Reject	Rejected
Reopen	Draft
Review	Reviewing
Rework	Analyzing

12. Save your changes and Refresh.
13. Scroll to the **Transitions** section and ensure the transitions reflect what is shown below:



Start action: Initialize Resolve action: Close Reopen action: Reopen

Transitions

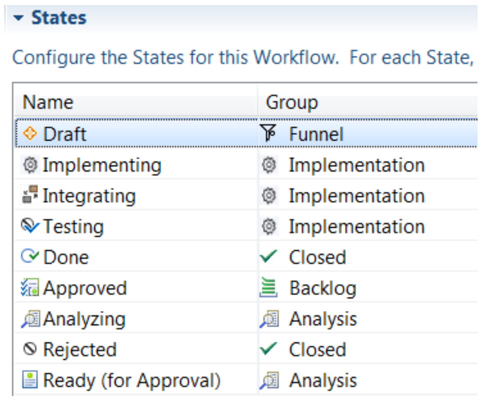
From \ To	Rejected	Draft	Approved	Analyzing	Reviewing	Done	Ready (for Approval)
Rejected	<None>	Reopen	None	None	None	None	None
Draft	Reject	<None>	None	None	Review	None	None
Approved	None	Reopen	<None>	Rework	Review	Close	None
Analyzing	Reject	Reopen	None	<None>	None	None	Ready
Reviewing	Reject	Reopen	None	Analyze	<None>	None	None
Done	None	Reopen	None	None	None	<None>	None
Ready (for Approval)	Reject	Reopen	Approve	Rework	None	None	<None>

14. Save your changes and Refresh.

FEATURE WORKFLOW

In SAFe V4.0, the Feature Kanban is precisely the same as the Capability Kanban. You make the same changes here as you did in the **Capability Workflow** section above with some additional states to refine the phases of implementation.

1. Select *Feature Workflow* in the **Choose the Workflow to Edit:** selection list.
2. Scroll to the **States** section and make the following changes:
    a. Change *New* to *Draft* associated with the *Funnel* Group
    b. Change *Integration* to *Integrating*
    c. Change the Group for *Implementing, Integrating* and *Testing* to *Implementation*
    d. Change the Group for *Done* to *Closed*
    e. Remove the *Invalid* state
    f. Add the following states: *Approved, Analyzing, Rejected, Ready (for Approval)* with the Groups shown.

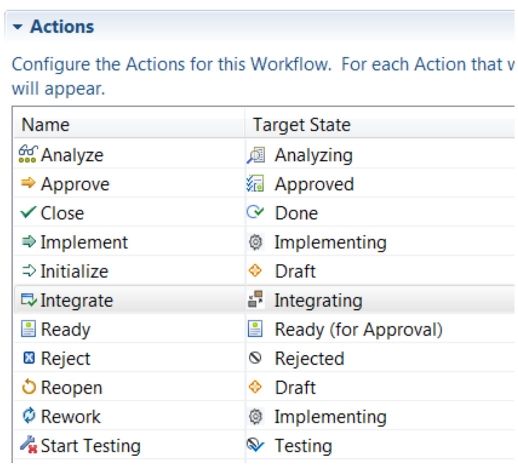


States

Configure the States for this Workflow. For each State,

Name	Group
Draft	Funnel
Implementing	Implementation
Integrating	Implementation
Testing	Implementation
Done	Closed
Approved	Backlog
Analyzing	Analysis
Rejected	Closed
Ready (for Approval)	Analysis

3. Save your changes and Refresh.
4. Scroll to the **Actions** section and and make the following changes:
    g. Change *Complete* to *Close*
    h. Change *Start Working* to *Implement*
    i. Add the following actions: *Analyze, Approve, Reject,* and *Ready* with the Target States shown below:

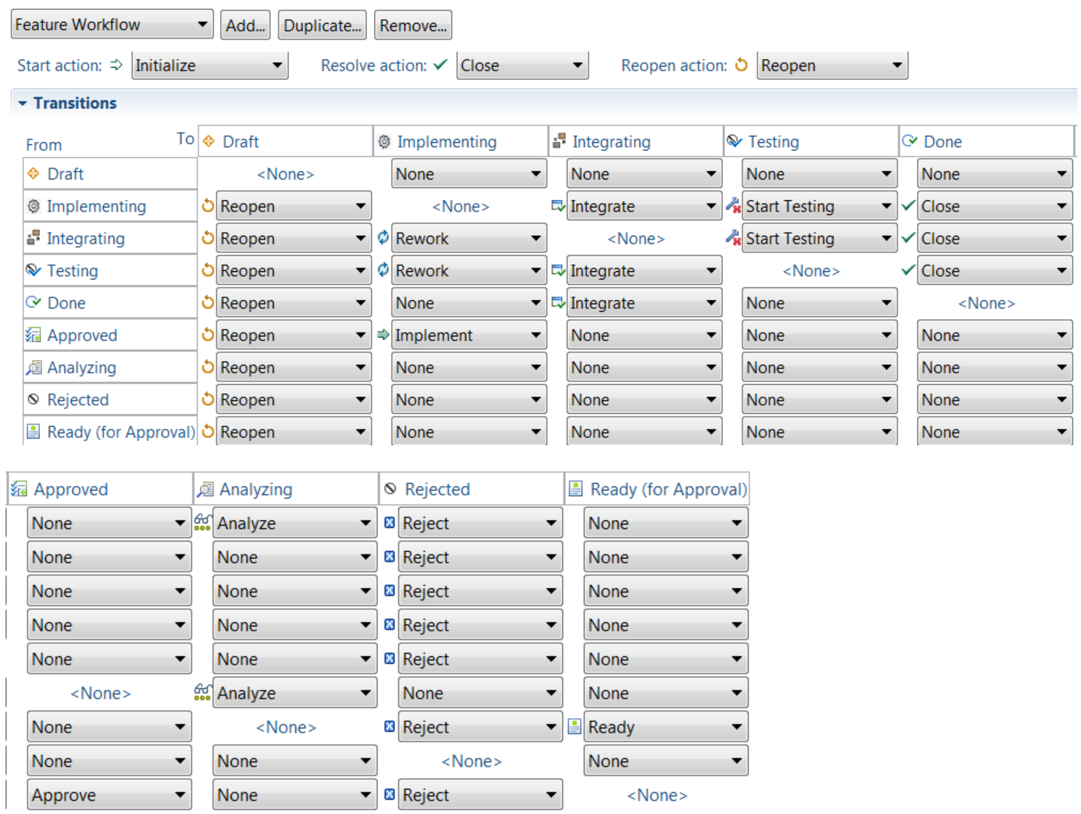


Actions

Configure the Actions for this Workflow. For each Action that v
will appear.

Name	Target State
Analyze	Analyzing
Approve	Approved
Close	Done
Implement	Implementing
Initialize	Draft
Integrate	Integrating
Ready	Ready (for Approval)
Reject	Rejected
Reopen	Draft
Rework	Implementing
Start Testing	Testing

5. Save your changes and Refresh.
6. Scroll to **Transitions** and make the following updates so that your workflow transitions reflect this configuration:



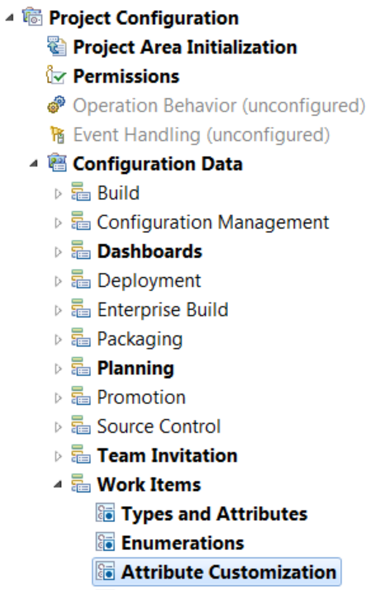
7. Save your changes.

Work Item Attributes

CALCULATED WSJF

We are adding a decimal version of the WSJF calculated attribute to enable more precision. The same calculation will be used to provide both the integer and decimal WSJF values, but some changes are required in the JavaScript. Perform these steps in both the **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas.

1. In the **My SAFe V4.0 Portfolio** project area, click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Work Items > Attribute Customization* in the **Configuration** box on the left:



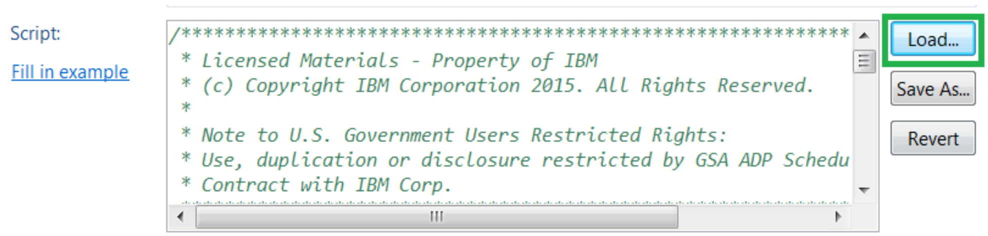
2. In the **Attribute Customization** pane, expand *Calculated Values* and click *Calculated WSJF.*
3. Copy-paste the following JavaScript to replace the JavaScript already specified for this calculation:

```
/*******************************************************************************
* Licensed Materials - Property of IBM
* (c) Copyright IBM Corporation 2015. All Rights Reserved.
*
* Note to U.S. Government Users Restricted Rights:
* Use, duplication or disclosure restricted by GSA ADP Schedule
* Contract with IBM Corp.
*******************************************************************************/
dojo.provide("com.ibm.team.workitem.attribute.wsjfValueProvider");

(function() {
    var doDebug= true;
    var scriptName= "wsjfCalculator";

dojo.declare("com.ibm.team.workitem.attribute.wsjfValueProvider", null, {

        getValue: function(attribute, workItem, configuration) {
            // Grab the enumeration label for each of the WSJF component attributes
                    var jobSizeLabel= workItem.getLabel("com.ibm.team.workitem.attribute.jobSize");
                    var ubValLabel= workItem.getLabel("com.ibm.team.workitem.attribute.ubVal");
                    var timeCritLabel= workItem.getLabel("com.ibm.team.workitem.attribute.timeCrit");
                    var rroeLabel= workItem.getLabel("com.ibm.team.workitem.attribute.rroe");

                    // Declare the numeric WSJF attributes
                    var jobSize= 0, ubVal= 0, timeCrit= 0, rroe= 0;

                    // Set the numeric attributes based on the enumeration label
                    // User/Business Value
                    ubVal= calc(ubValLabel, 0);

                    // Time Criticality
                    timeCrit= calc(timeCritLabel, 0);

                    // RR/OE
                    rroe= calc(rroeLabel, 0);

                    // Job Size
```

```
                    jobSize= calc(jobSizeLabel, 1);

                    var costOfDelay= ubVal + timeCrit + rroe;

                    var wsjfString = Number(costOfDelay / jobSize).toFixed(2);

                    var wsjf = Number(wsjfString);

                    return wsjf;

                    function calc(a_label, default_val) {
                            var result= default_val;
                            switch (a_label) {
                                    case '1':
                                            result= 1;
                                            break;
                                    case '2':
                                            result= 2;
                                            break;
                                    case '3':
                                            result= 3;
                                            break;
                                    case '5':
                                            result= 5;
                                            break;
                                    case '8':
                                            result= 8;
                                            break;
                                    case '13':
                                            result= 13;
                                            break;
                                    case '20':
                                            result= 20;
                                            break;
                            }
                    return result;
                    }
            }
        });
    })();
```

4. Click the **Save As...** button to save this script to your local machine so that you can load it into the **My SAFe V4.0 Portfolio** project area:

5. Save your changes.
6. In the **My SAFe V4.0 Portfolio** project area, go to the **Attribute Customization** pane, expand *Calculated Values* and select *Calculated WSJF.* Click the **Load...** button to load the script you saved above into this Script box:

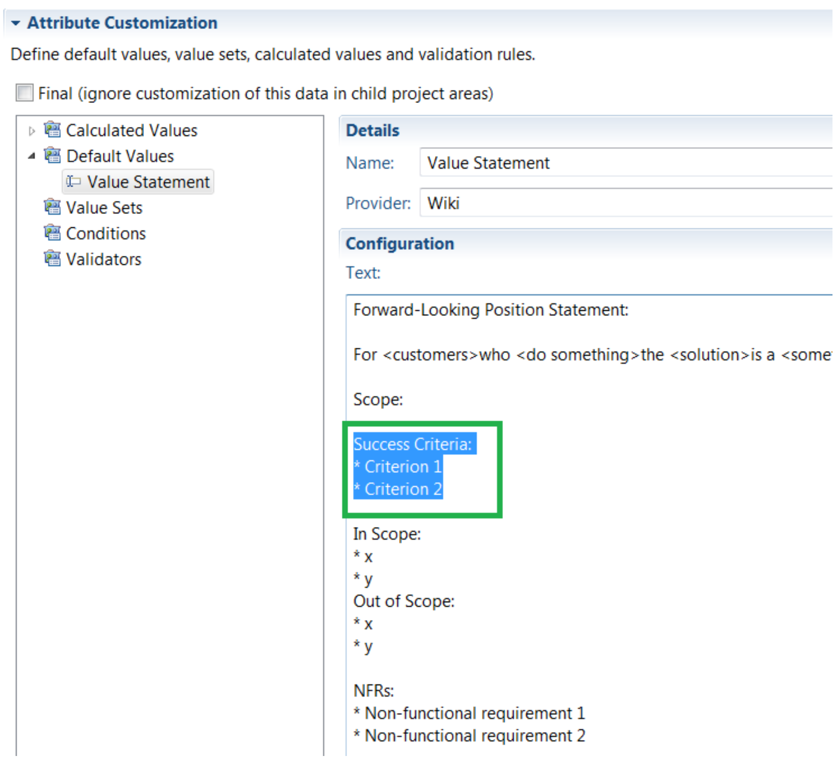


7. Save your changes.

VALUE STATEMENT

We are formalizing the articulation of the Success Criteria in the SAFe V4.0 templates, so to eliminate redundancy, we must remove the **Success Criteria** section of the *Value Statement* attribute. Perform these steps in both the **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas.

1. In the **Attribute Customization** pane, expand *Default Values* and click *Value Statement.* Remove the **Success Criteria** section of the configuration text:



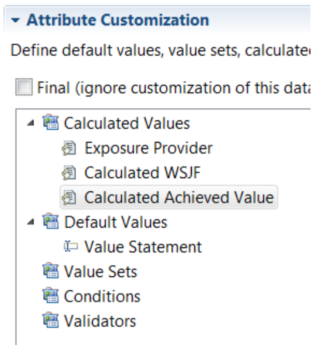
2. Save your changes.

Make sure you perform these changes for *both* project areas!

CALCULATED ACHIEVED VALUE

In the SAFe V4.0 templates, we are allowing for a value of 0 for *Business Value (planned)* and *Business Value (actual)* in the *PI Objective* work item type. As a result, the calculation for *Achieved Value (%)* must be updated. Note that this calculation only exists in your **My SAFe V4.0 Program** project area. It will need to be updated there and created in **My SAFe V4.0 Portfolio** project area.

1. In the **My SAFe V4.0 Program** project area, go to the **Attribute Customization** pane, expand *Calculated Values* and click *Calculated Achieved Value.*



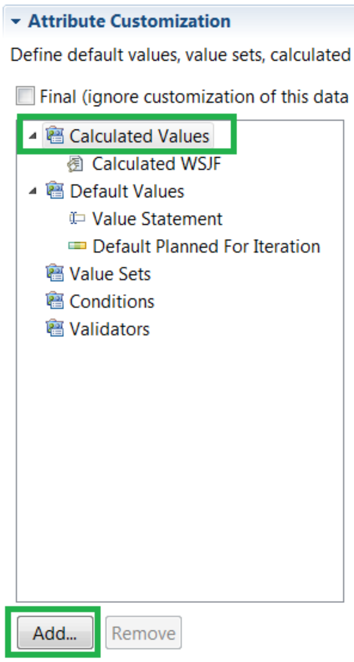
2. In the configuration box, replace the existing script with this code:

```
/*******************************************************************************
* Licensed Materials - Property of IBM
* (c) Copyright IBM Corporation 2015. All Rights Reserved.
*
* Note to U.S. Government Users Restricted Rights:
* Use, duplication or disclosure restricted by GSA ADP Schedule
* Contract with IBM Corp.
*******************************************************************************/
dojo.provide("com.ibm.team.workitem.attribute.achievedValueProvider");

(function() {

dojo.declare("com.ibm.team.workitem.attribute.achievedValueProvider", null, {

        getValue: function(attribute, workItem, configuration) {
            // Grab the enumeration label for business value attributes
                   var busValuePlannedLabel=
workItem.getLabel("com.ibm.team.workitem.attribute.busValuePlanned");
                   var busValueActualLabel=
workItem.getLabel("com.ibm.team.workitem.attribute.busValueActual");

                   // Declare the numeric business value attributes
                   var busValPlanned= 0, busValActual= 0;

                   // Set the numeric attributes based on the enumeration label
                   // Business Value (planned)
                   busValPlanned= calc(busValuePlannedLabel, 1);

                   // Business Value (actual)
                   busValActual= calc(busValueActualLabel, 1);


                   var achievedValueRatio = 0;
                   var achievedValue = 0;
                   if (busValPlanned > 0 & busValActual > 0) {
                          achievedValueRatio= Number(busValActual / busValPlanned);
                       achievedValue= achievedValueRatio * 100;
                   } else;

                   return achievedValue;

                   function calc(a_label, default_val) {
                          var result= default_val;
                          switch (a_label) {
                          case '0':
                                 result= 0;
```

```
                                        break;
                                        case '1':
                                                result= 1;
                                                break;
                                        case '2':
                                                result= 2;
                                                break;
                                        case '3':
                                                result= 3;
                                                break;
                                        case '4':
                                                result= 4;
                                                break;
                                        case '5':
                                                result= 5;
                                                break;
                                        case '6':
                                                result= 6;
                                                break;
                                        case '7':
                                                result= 7;
                                                break;
                                        case '8':
                                                result= 8;
                                                break;
                                        case '9':
                                                result= 9;
                                                break;
                                        case '10':
                                                result= 10;
                                                break;
                                }
                        return result;
                        }
                }
        });
})();
```

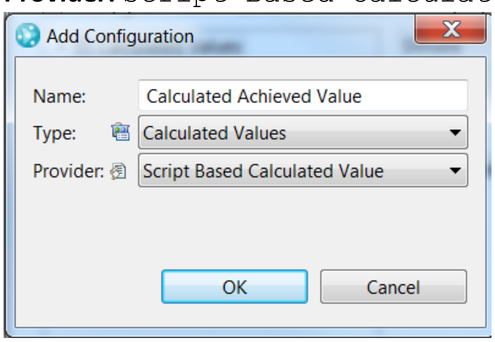
3. Save your changes.
4. Click the **Save As…** button to save this script to your local machine so that you can load it into the **My SAFe V4.0 Portfolio** project area:

5. In the **My SAFe V4.0 Portfolio** project area, go to the **Attribute Customization** pane, expand *Calculated Values* and click the **Add…** button to create the *Calculated Achieved Value:*

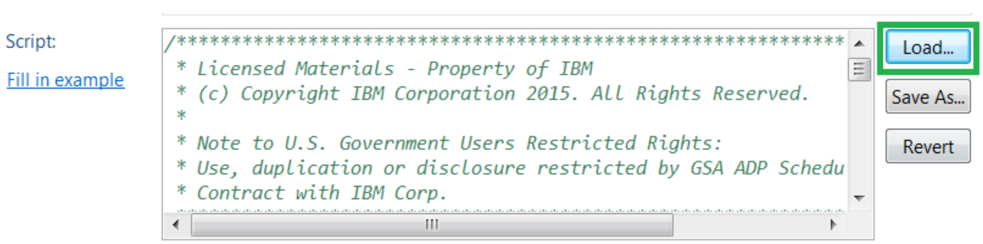


6. Specify these details and click OK:

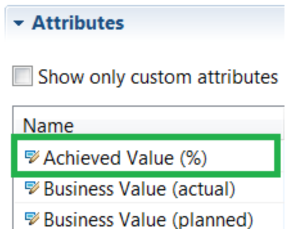
   Name: `Calculated Achieved Value`
   Type: `Calculated Values`
   Provider: `Script Based Calculated Value`



7. Click the **Load…** button to load the script you saved above into this Script box:

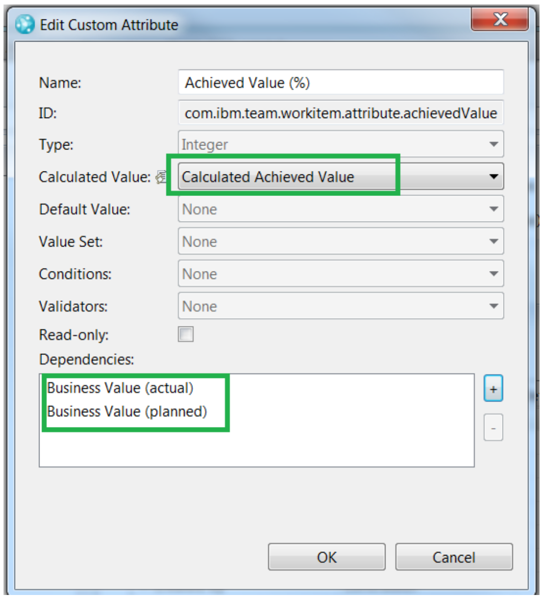


8. Save your changes.
9. In the **Configuration** pane on the left, navigate to **Work Items > Types and Attributes**.
10. Select the *PI Objective* work item type and scroll down to **Attributes.**
11. Select the *Achieved Value (%)* attribute and then **Edit…** to add the calculation:

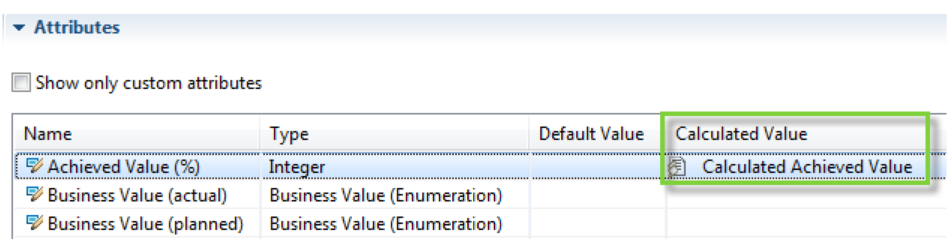


12. Specify these details:

    Calculated Value: `Calculated Achieved Value`
    Dependencies: `Business Value (planned), Business Value (actual)`



13. After clicking OK, the Calculated Value appears in the **Attributes** box for this attribute:

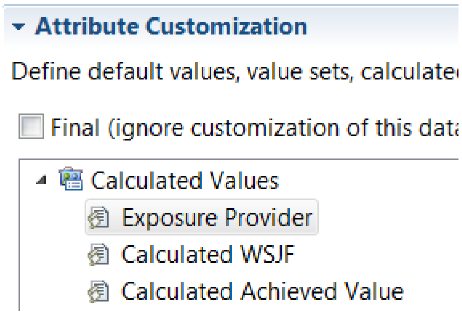


14. Save your changes.

EXPOSURE PROVIDER

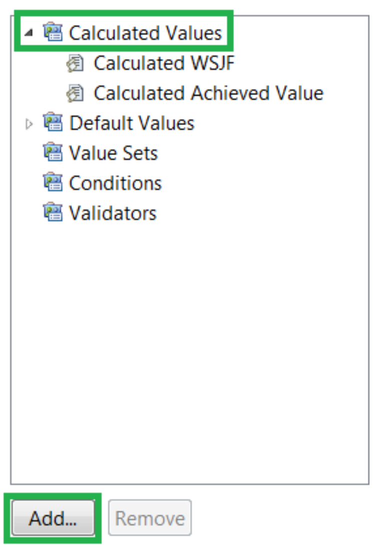
We are adding the **Risk** work item type to the SAFe Portfolio project area so in this section we will copy the *Exposure Provider* script-based calculated value from the **My SAFe V4.0 Program** project area.

1. In the **My SAFe V4.0 Program** project area, go to the **Attribute Customization** pane, expand *Calculated Values* and click on *Exposure Provider.*



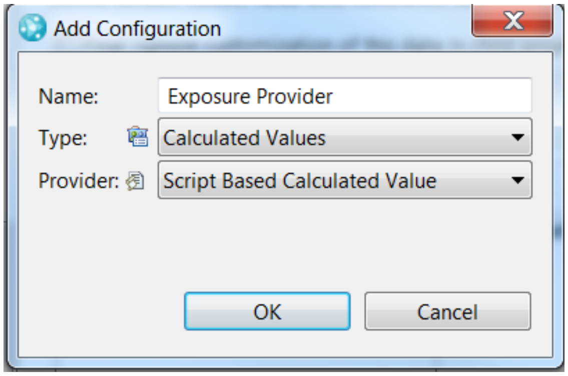
2. In the configuration box, click the **Save As…** button to save this script to your local machine so that you can load it into the **My SAFe V4.0 Portfolio** project area:

3. In the **My SAFe V4.0 Portfolio** project area, go to the **Attribute Customization** pane, expand *Calculated Values* and click the **Add…** button to create the *Exposure Provider:*

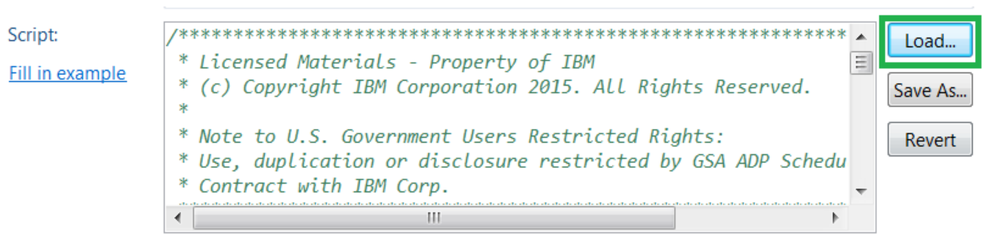


4. Specify these details and click OK:

Name: `Exposure Provider`
Type: `Calculated Values`
Provider: `Script Based Calculated Value`

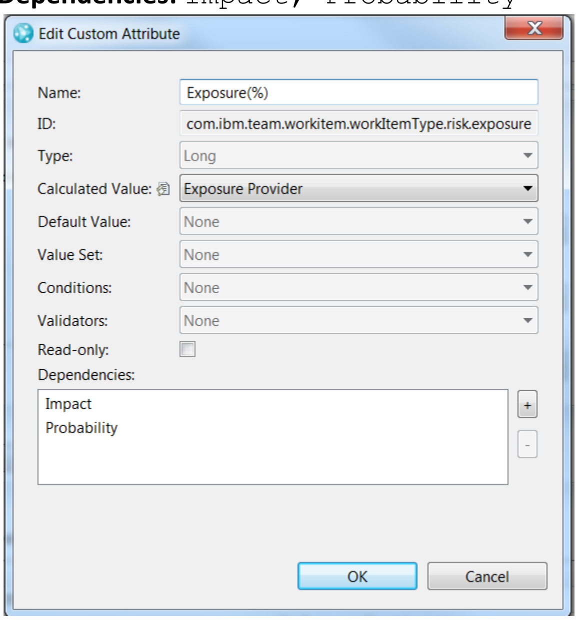


5. Click the **Load…** button to load the script you saved above into this Script box:

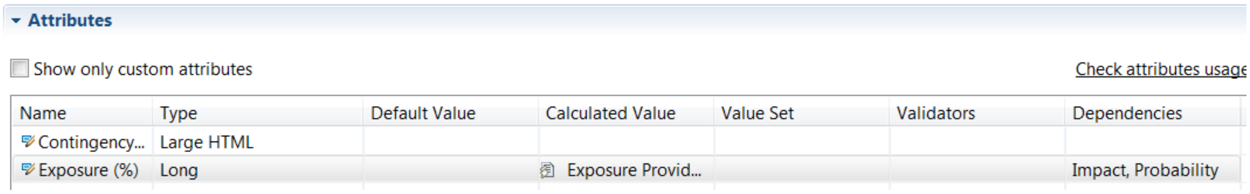


6. Save your changes.
7. In the **Configuration** pane on the left, navigate to **Work Items > Types and Attributes**.
8. Select the *Risk* work item type and scroll down to **Attributes.**
9. Select the *Exposure (%)* attribute and then **Edit…** to add the calculation, specifying these details:

Calculated Value: `Exposure Provider`
Dependencies: `Impact, Probability`



10. Click OK. The Calculated Value appears in the **Attributes** box for this attribute:

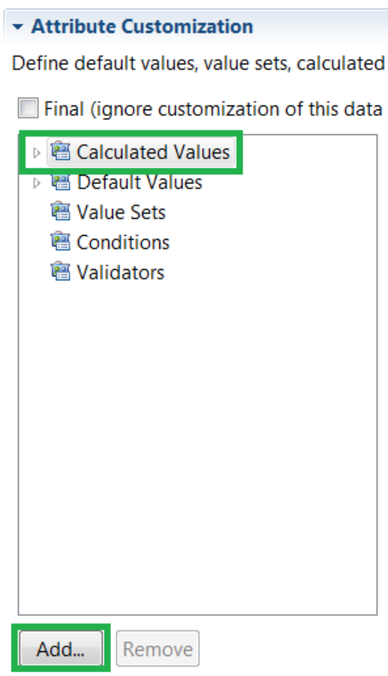


11. Save your changes.

NUMERIC STORY POINTS

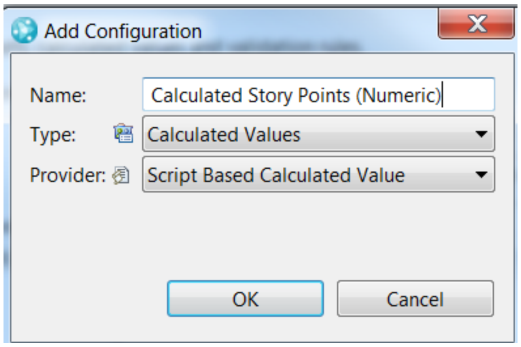
We've added an attribute to hold the numeric value of the Story Points (Complexity) attribute, which is an enumeration. The new attribute, *Story Points (numeric)*, will be set via a calculation based on the *Story Points* enumerated value.

1. In the **My SAFe V4.0 Program** project area, go to the **Attribute Customization** pane, selected *Calculated Values* and click the **Add…** button:



2. Specify these details and click OK:

Name: `Calculated Story Points (Numeric)`
Type: `Calculated Values`
Provider: `Script Based Calculated Value`



3. Copy-paste this script into the **Configuration** box:

```
/*******************************************************************************
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*
* Note to U.S. Government Users Restricted Rights:
* Use, duplication or disclosure restricted by GSA ADP Schedule
* Contract with IBM Corp.
*******************************************************************************/
dojo.provide("com.ibm.team.workitem.attribute.numStoryPtsValueProvider");

(function() {
        var doDebug= true;
    var scriptName= "numericStoryPointsCalculator";

dojo.declare("com.ibm.team.workitem.attribute.numStoryPtsValueProvider", null, {

        getValue: function(attribute, workItem, configuration) {
               // Grab the enumeration label for the Story Points attribute
                       var storyPtsLabel=
workItem.getLabel("com.ibm.team.apt.attribute.complexity");

                       // Declare the numeric Story Points attributes
                       var numStoryPts= 0;

                       // Set the numeric attribute based on the enumeration label
                       numStoryPts= calc(storyPtsLabel, 0);

                       return numStoryPts;

                       function calc(a_label, default_val) {
                               var result= default_val;
                               switch (a_label) {
                                       case 'XS (1 pt)':
                                               result= 1;
                                               break;
                                       case 'S (2 pts)':
                                               result= 2;
                                               break;
                                       case 'M (3 pts)':
                                               result= 3;
                                               break;
                                       case 'L (5 pts)':
                                               result= 5;
                                               break;
                                       case 'XL (8 pts)':
                                               result= 8;
                                               break;
                                       case 'XXL (13 pts)':
                                               result= 13;
                                               break;
```
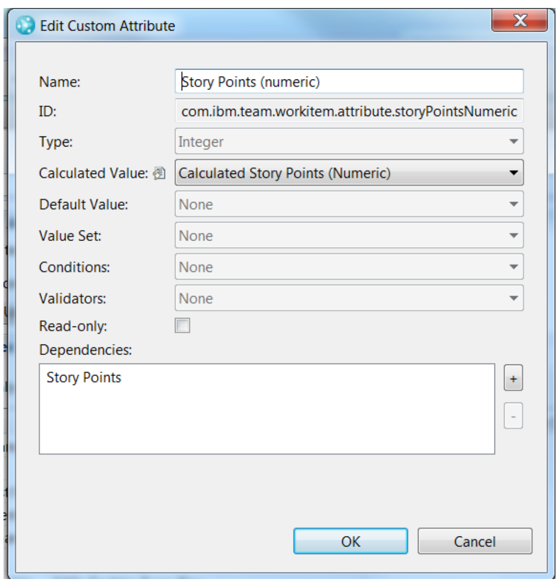
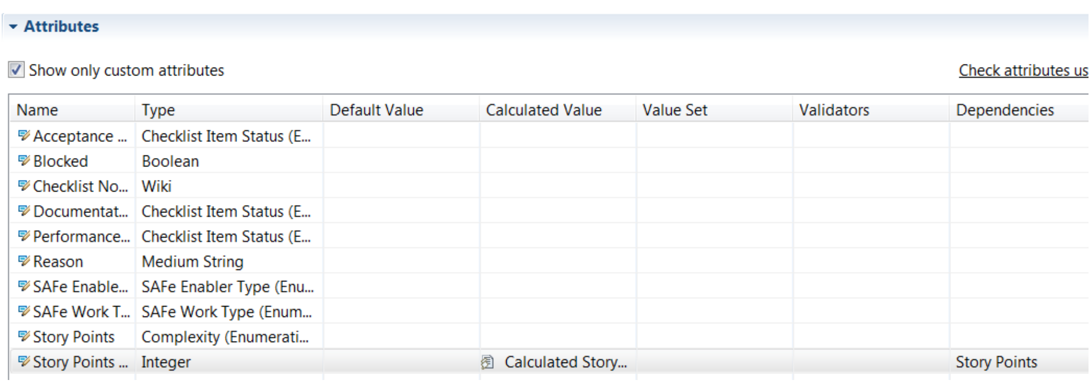

```
                                        case 'XXXL (21 pts)':
                                                result= 21;
                                                break;
                                    }
                            return result;
                            }
            }
          });
})();
```

4. Save your changes.
5. In the **Configuration** pane on the left, navigate to **Work Items > Types and Attributes**.
6. Select the *Story* work item type and scroll down to **Attributes.**
7. Select the *Story Points (numeric)* attribute and then **Edit...** to add the calculation, specifying these details:

   Calculated Value: `Calculated Story Points (Numeric)`
   Dependencies: `Story Points`



8. Click OK. The Calculated Value appears in the **Attributes** box for this attribute:



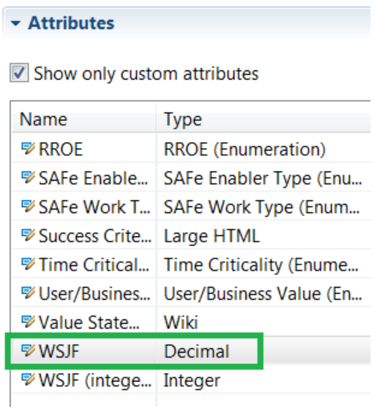
Name	Type	Default Value	Calculated Value	Value Set	Validators	Dependencies
Acceptance ...	Checklist Item Status (E...					
Blocked	Boolean					
Checklist No...	Wiki					
Documentat...	Checklist Item Status (E...					
Performance...	Checklist Item Status (E...					
Reason	Medium String					
SAFe Enable...	SAFe Enabler Type (Enu...					
SAFe Work T...	SAFe Work Type (Enum...					
Story Points	Complexity (Enumerati...					
Story Points ...	Integer		Calculated Story...			Story Points

9. Save your changes.

UPDATE “DECIMAL” WSJF

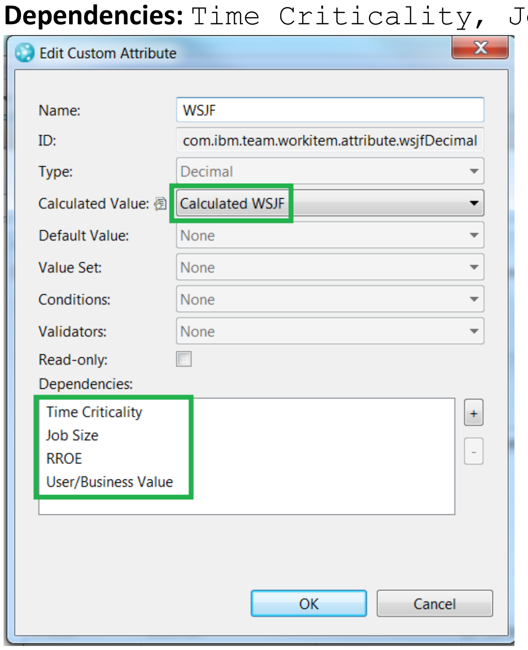
In both the Portfolio and Program templates, we are changing the **WSJF** attribute to be a decimal type. We’ve added the new attribute in the previous sections. Now we need to update the attributes to use the *Calculated WSJF* Calculated Value, remove the integer version of the attribute and synchronize with any existing work items. Perform these steps in both the **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas.

1. In the **My SAFe V4.0 Portfolio** project area, go to the **Configuration** pane and navigate to **Work Items > Types and Attributes**.
2. Select the *Portfolio Epic* work item type and scroll down to **Attributes.**
3. Select the *WSJF* decimal attribute and then **Edit…** to add the calculation:

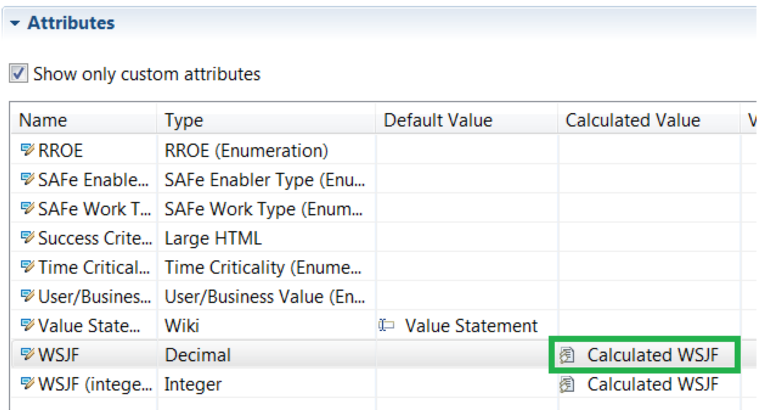


4. Specify these details:

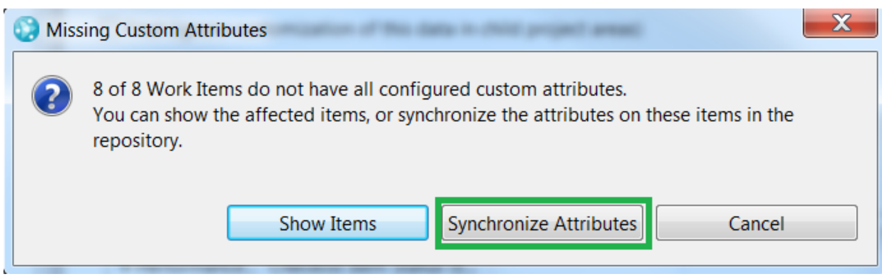
Calculated Value: `Calculated WSJF`
Dependencies: `Time Criticality, Job Size, RROE, User/Business Value`



5. After clicking OK, the Calculated Value appears in the **Attributes** box for this attribute:



6. Save your changes.
7. Click on the Check attributes usages in repository hyperlink in the top right of the **Attributes** box and synchronize with any existing work items:

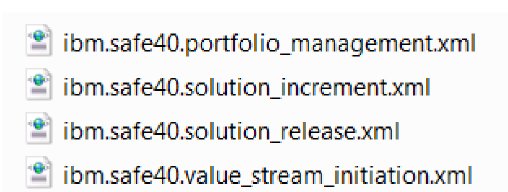


8. Select the *Value Stream Epic* and *Capability* work item types and synchronize changes with any existing work items.
9. Repeat this entire process in the **My SAFe Va4.0 Program** project area.

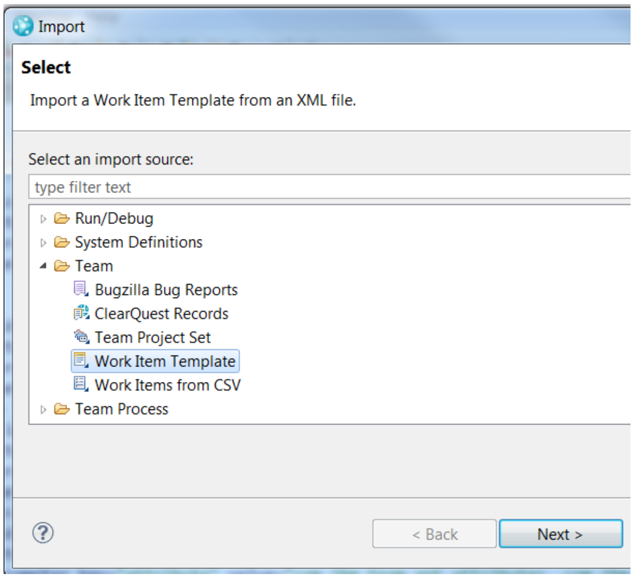
Work Item Templates

In this section, we import the Portfolio and Program Work Item Templates into the process templates. Perform these steps in both the **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas.

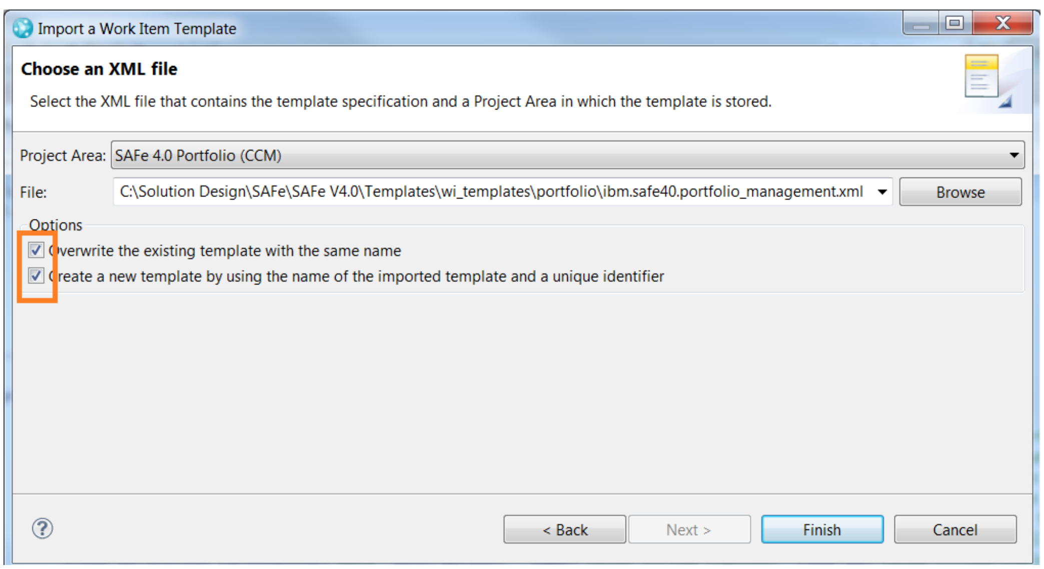
1. Download the **portfolio_wi_templates.zip** archive file and unzip it into a local directory. You should have these XML files as a result:



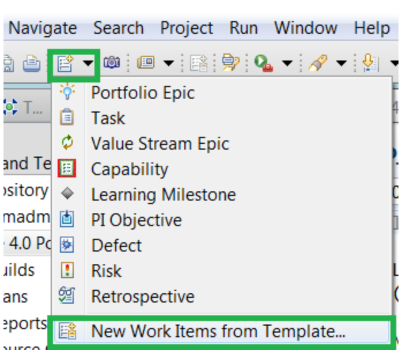
2. Right-click to open the **My SAFe V4.0 Portfolio** project area.
3. Repeat the import process to import each template:
   a. Select **File > Import...** and, in the *Import* dialog box, select **Team > Work Item Template** then click next:

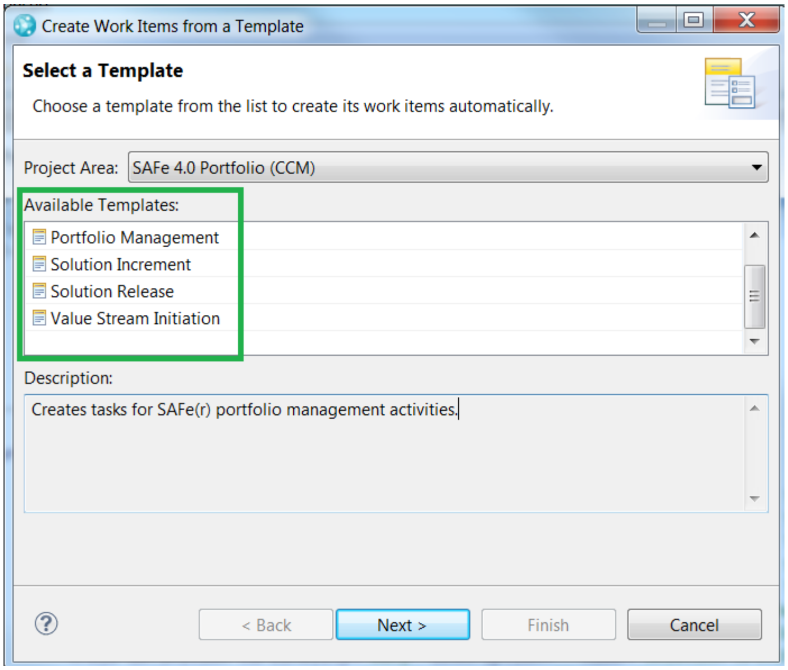


b. Click the **Browse** button to navigate to the template and import it into your project area. Make sure to check both Option checkboxes:

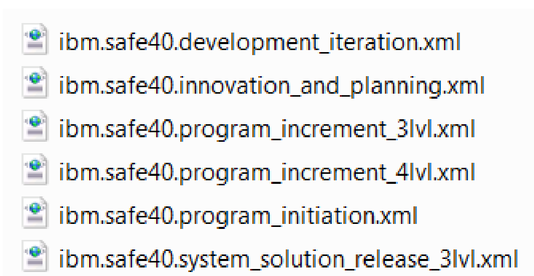


c. Click **Finish.** Confirm that all Portfolio Work Item Templates have been imported by navigating to **New Work Item > New Work Items from Template…** :

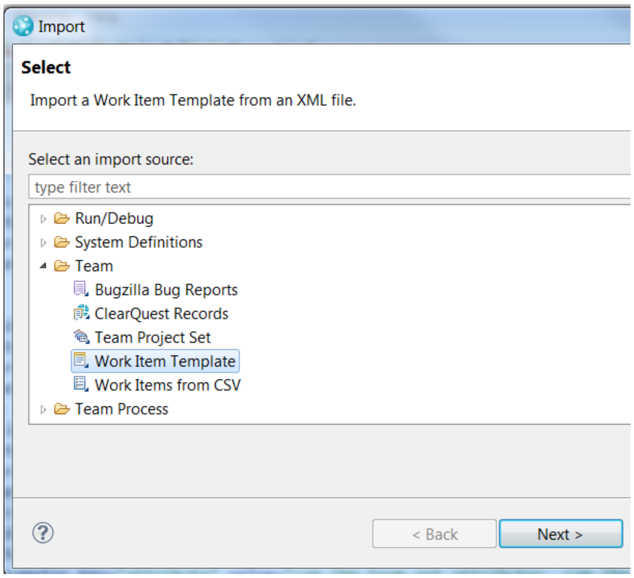




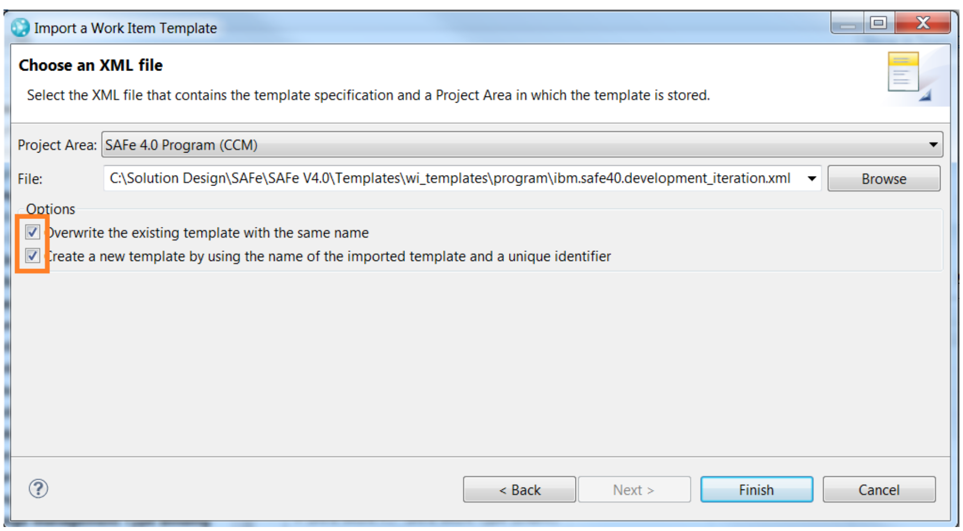
4. Download the **program_wi_templates.zip** archive file and unzip it into a local directory. You should have these XML files as a result:



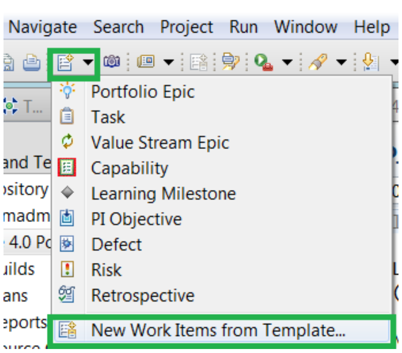
5. Right-click to open the **My SAFe V4.0 Program** project area.
6. Repeat the import process to import each template:
    a. Select **File > Import...** and, in the *Import* dialog box, select **Team > Work Item Template** then click next:

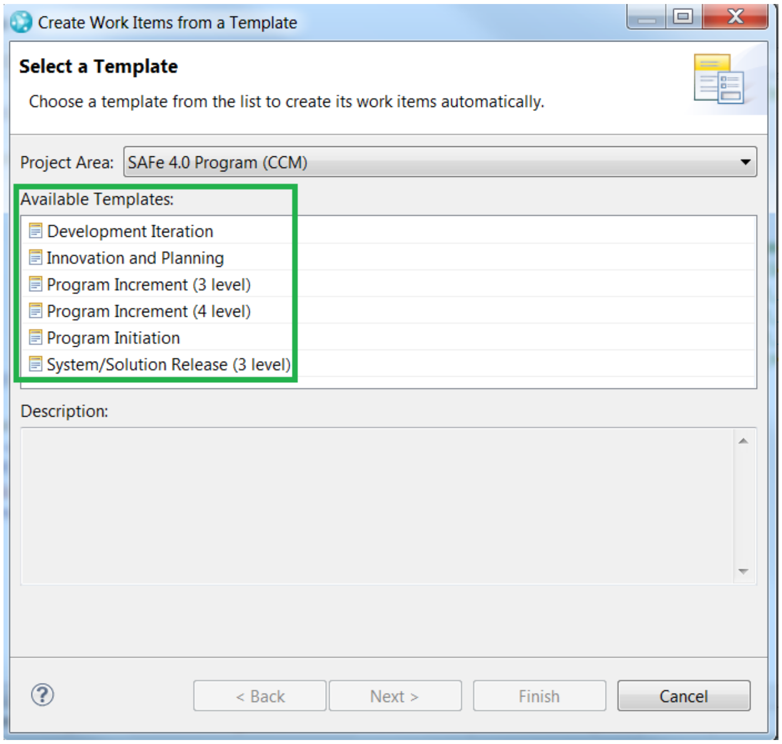


b. Click the **Browse** button to navigate to the template and import it into your project area. Make sure to check both Option checkboxes:



c. Click **Finish.** Confirm that all Portfolio Work Item Templates have been imported by navigating to **New Work Item > New Work Items from Template…** :



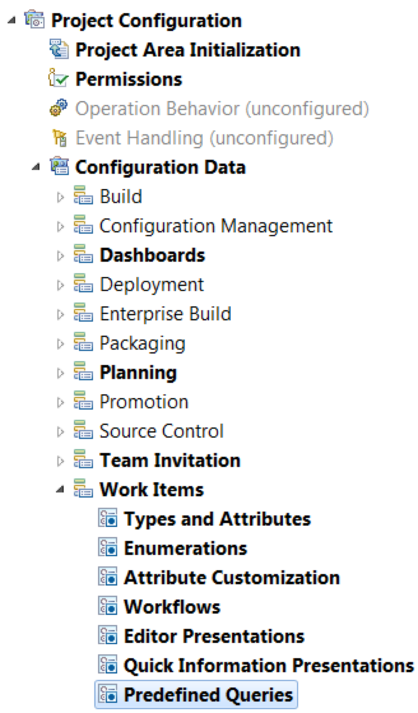


Congratulations on your progress so far! You have completed your updates to the **My SAFe V4.0 Portfolio** project area. Next you configure the changes required to bring the Program template up to the SAFe V4.0 level.

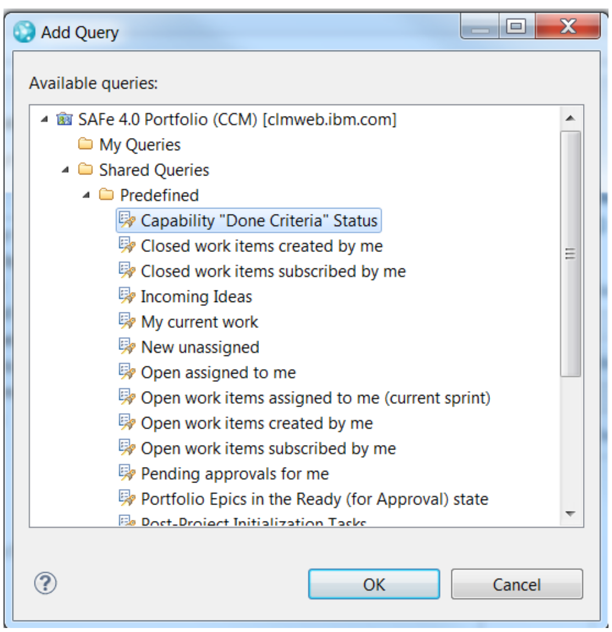
Work Item Predefined Queries

In this section, we designate new Queries as Predefined Queries and add dashboard widgets. Do this in both the Portfolio and Program project areas.

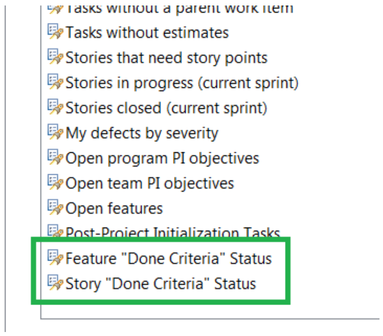
1. Right-click to open the **My SAFe V4.0 Portfolio** project area if it is not already opened.
2. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Work Items > Predefined Queries*



3. In the **Predefined Queries** pane, click **Add…** to add a predefined query. Navigate to the *Capability "Done Criteria" Status* query, select it and click OK:



4. Save your changes.
5. Repeat this process to add the *Feature "Done Criteria" Status* and *Story "Done Criteria" Status* predefined queries in the **My SAFe V4.0 Program** project area. Your predefined query list for the Program should include these:

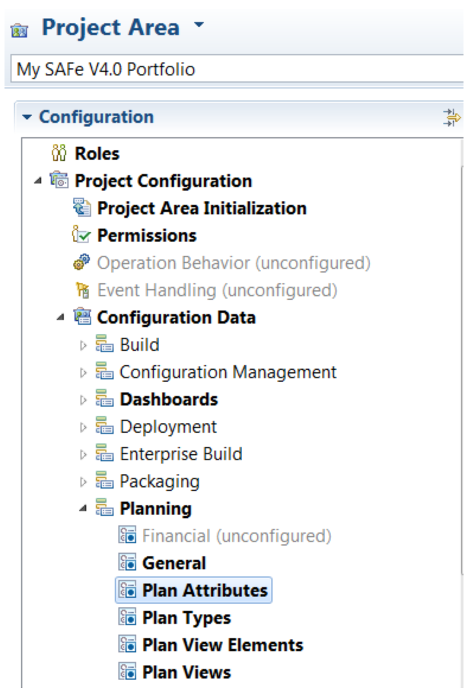


6. Save your changes.

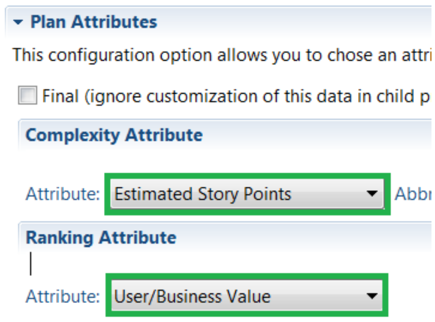
PLANS

In this section, you update the Plan elements that will enable you to show the new attributes in plan views. Note that, if you are extracting process templates, these changes must be made in the process XML so additional steps will be required below in the Extract Process Templates section. Perform these steps in both the **My SAFe V4.0 Portfolio** and **My SAFe V4.0 Program** project areas.

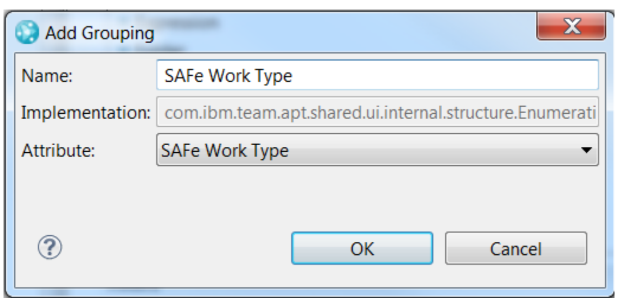
1. In the **My SAFe V4.0 Portfolio** project area, click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Planning > Plan Attributes* in the **Configuration** box on the left:



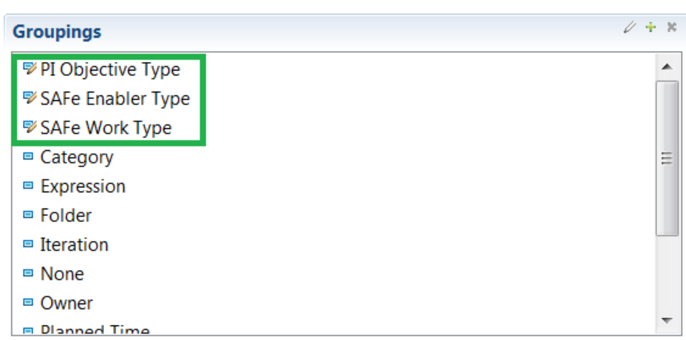
2. Set the **Complexity Attribute** to *Estimated Story Points* and the **Ranking Attribute** to *User/Business Value*:



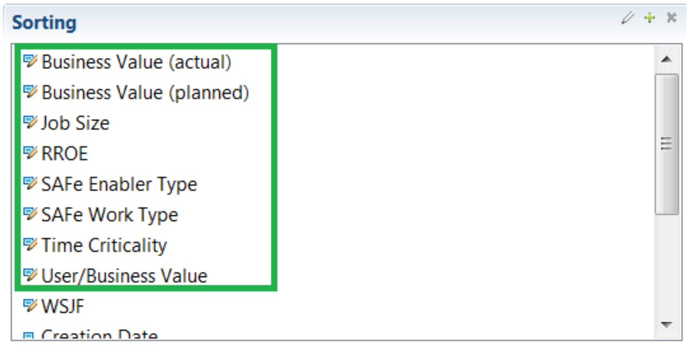
3. Expand the **Attributing Mapping** section, and make the following changes:
    a. Select *Epic Type* and then the **Remove** button to remove this attribute
    b. Click the **Add** button and then add each of these attributes: *WSJF, SAFe Enabler Type, SAFe Work Type, Estimated Story Points, Actual Story Points, Proposed, Business Value (planned), Business Value (actual), Achieved Value (%),* and *PI Objective Type.*
4. Navigate to *Project Configuration > Configuration Data > Planning > Plan View Elements* in the **Configuration** box on the left. Click the **+** in the **Groupings** box to add: `SAFe Work Type, SAFe Enabler Type, PI Objective Type`, for example:



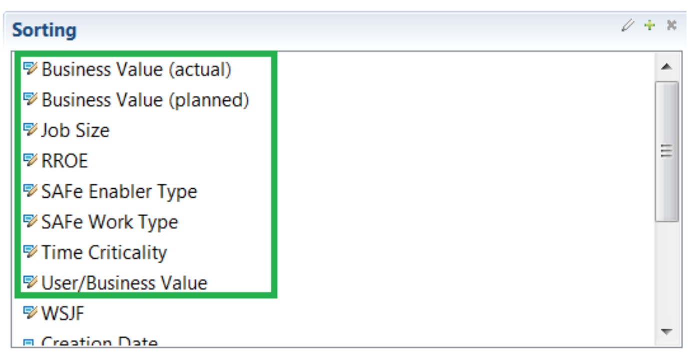
The resulting **Groupings** box shows the new attributes:



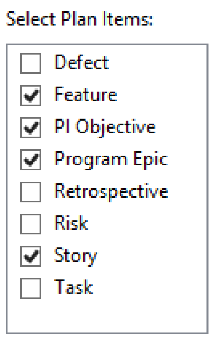
5. In the **Sorting** box, click the **+** to add: `Business Value (planned), Business Value (actual), SAFe Work Type, SAFe Enabler Type, Job Size, RROE, Time Criticality, User/Business Value`. The resulting **Sorting** box shows the new attributes:



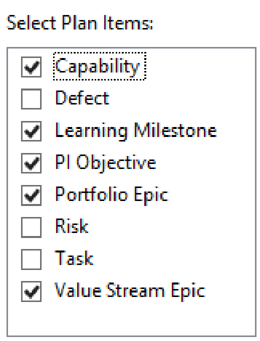
6. Save your changes.
7. In the **My SAFe V4.0 Program** project area, click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Planning > Plan Attributes* in the **Configuration** box on the left.
8. Change the **Ranking Attribute** to *User/Business Value.*
9. Expand the **Attributing Mapping** section, and make the following changes:
    a. Select *Feature Type* and *Epic Type* and then the **Remove** button to remove these attributes.
    b. Click the **Add** button and then add each of these attributes: *SAFe Enabler Type, SAFe Work Type, Proposed, Estimated Story Points, Actual Story Points* and *Achieved Value (%)*
10. Navigate to *Project Configuration > Configuration Data > Planning > Plan View Elements* in the **Configuration** box on the left. Click the **+** in the **Groupings** box to add: `SAFe Work Type, SAFe Enabler Type, PI Objective Type`, as you did above.
11. In the **Sorting** box, click the **+** to add: `Business Value (planned), Business Value (actual), SAFe Work Type, SAFe Enabler Type, Job Size, RROE, Time Criticality, User/Business Value`. The resulting **Sorting** box shows the new attributes:



12. Save your changes.
13. In the **My SAFe V4.0 Program** project area, click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Planning > Work Item Type Categorization* in the **Configuration** box on the left.
14. Select the *Feature, PI Objective, Program Epic,* and *Story* as Plan Items:



15. Repeat these steps in the **My SAFe V4.0 Portfolio** project area to select *Capability, Learning Milestone, PI Objecctive, Portfolio Epic,* and *Value Stream Epic* as Plan Items:



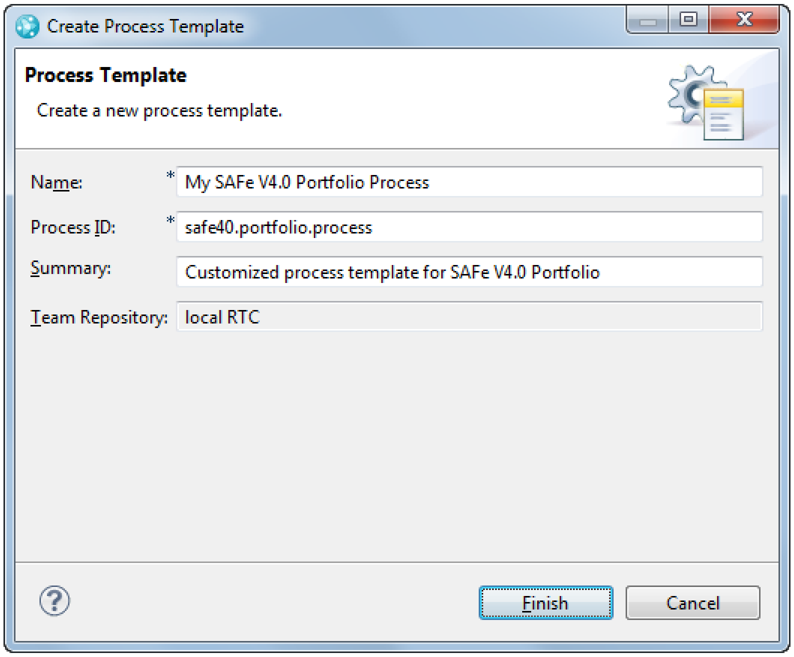
16. Save your changes and close both project areas.

Extract Process Templates

You are now ready to extract the process templates you've configured in your project areas.

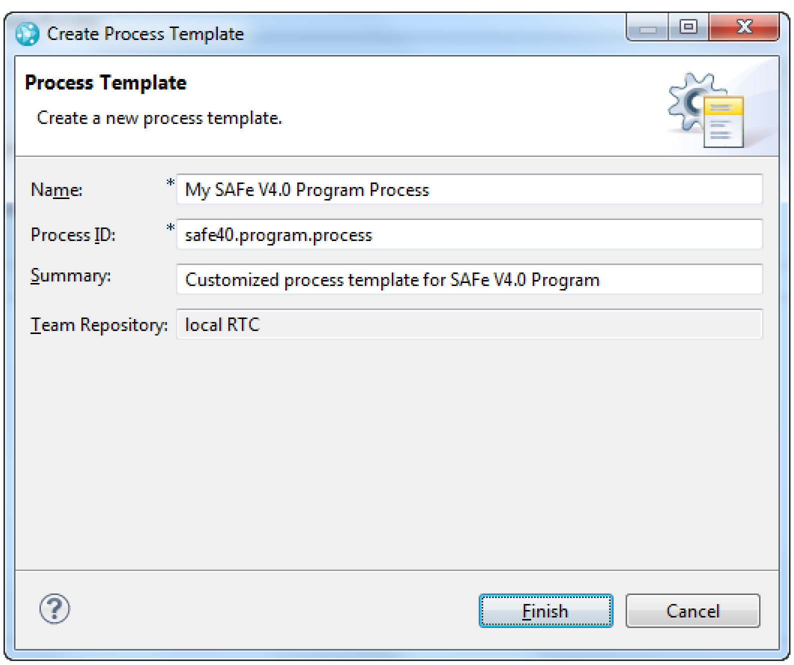
1. Right-click on the **My SAFe V4.0 Portfolio** project area and select **Extract Process Template…**
2. Specify the following:

   Name: `My SAFe V4.0 Portfolio Process`
   Process ID: `safe40.portfolio.process`
   Summary: `Customized process template for SAFe V4.0 Portfolio`



3. Click Finish. The new process template is opened for editing. Leave it opened and return to the Project Area hierarchy.
4. Right-click on the **My SAFe V4.0 Program** project area and select **Extract Process Template…**
5. Specify the following:

Name: `My SAFe V4.0 Program Process`
Process ID: `safe40.program.process`
Summary: `Customized process template for SAFe V4.0 Program`



6. Click Finish. The new process template is opened for editing.

Update SAFe V4.0 Portfolio Process Template

In this section, we update the following elements in the Portfolio process template:

- Team Area Hierarchy: Add Value Streams as team areas within the Portfolio project area
- Work Item Categories: Add Value Stream categories for the Value Stream team areas
- Plan Types, Modes & Filters: Add the Value Stream Backlog plan type with plan modes for Kanban, Roadmap and WSJF Ranked List view along with the necessary filters.

> ***Note:*** *In the following sections, you will be copying and pasting XML source into the Process Configuration Source. Unless otherwise indicated, you can paste that source at the end of any section, taking care to ensure that the formatting is correct and no XML errors are introduced.*

Team Area Hierarchy

In this section, we add the new Value Stream team areas.

1. In the **My SAFe V4.0 Portfolio Process**, click the **Process Configuration Source** tab.
2. Locate the `<followup-actions>` section in the XML. Copy and paste the following XML into that section ***so that the actions appear first***:

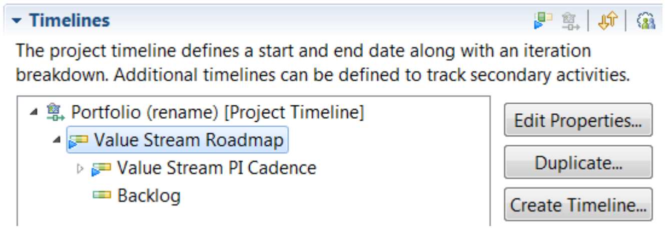
```
<followup-action
xmlns="http://com.ibm.team.process/createTeamAreas" description="Initializes the project area
with default team areas." id="com.ibm.team.process.server.createTeamAreas" name="Create Team
Areas" optional="false">
        <teamArea name="Value Stream 1 (rename)"/>
        <teamArea name="Value Stream 2 (rename)"/>
</followup-action>
<followup-action
xmlns="http://com.ibm.team.process/setUpProject" description="Initializes the project area
with default categories." id="com.ibm.team.process.server.setUpProject" name="Set Up
Categories" optional="false">
        <workitems>
                <category htmlDescription="Value Stream 1
(rename)" path="Portfolio Name (rename)/Value Stream 1 (rename)"/>
                <category htmlDescription="Value Stream 2
(rename)" path="Portfolio Name (rename)/Value Stream 2 (rename)"/>
        </workitems>
</followup-action>
```

3. Save your changes.

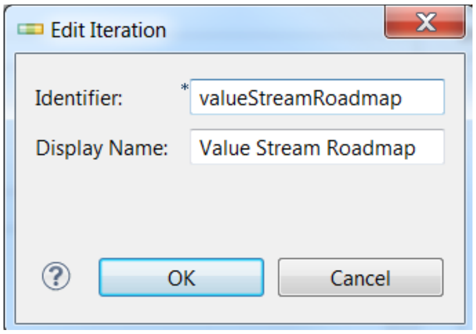
Plans

In this section, we update the Portfolio plans and add new plans for the Value Streams.

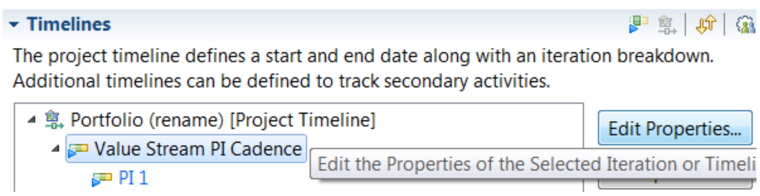
1. Select the **Overview** tab in the **My SAFe V4.0 Portfolio Process** template. In the **Timelines** section, select the *Value Stream Roadmap* and click the **Edit Properties…** button:



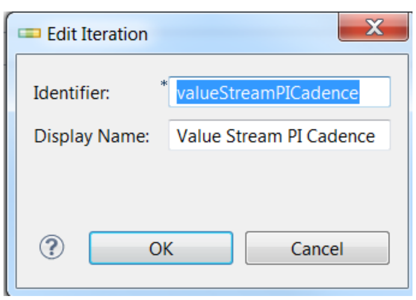
2. Change the **Identifier** to: `valueStreamRoadmap`



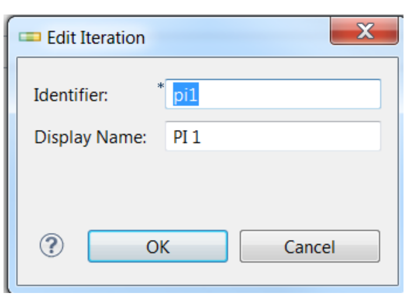
3. Select the *Value Stream PI Cadence* and click the **Edit Properties…** button:



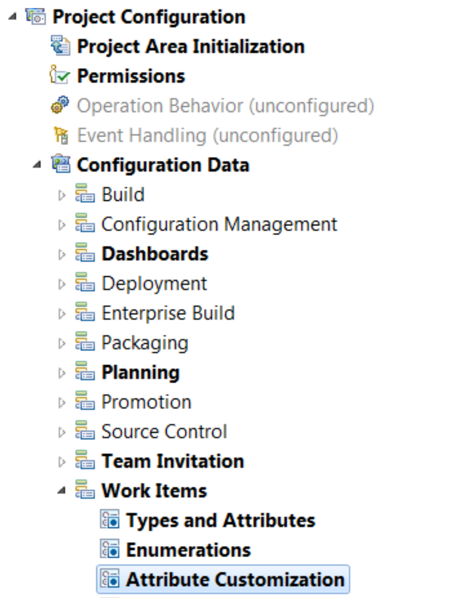
4. Change the **Identifier** to: `valueStreamPICadence`



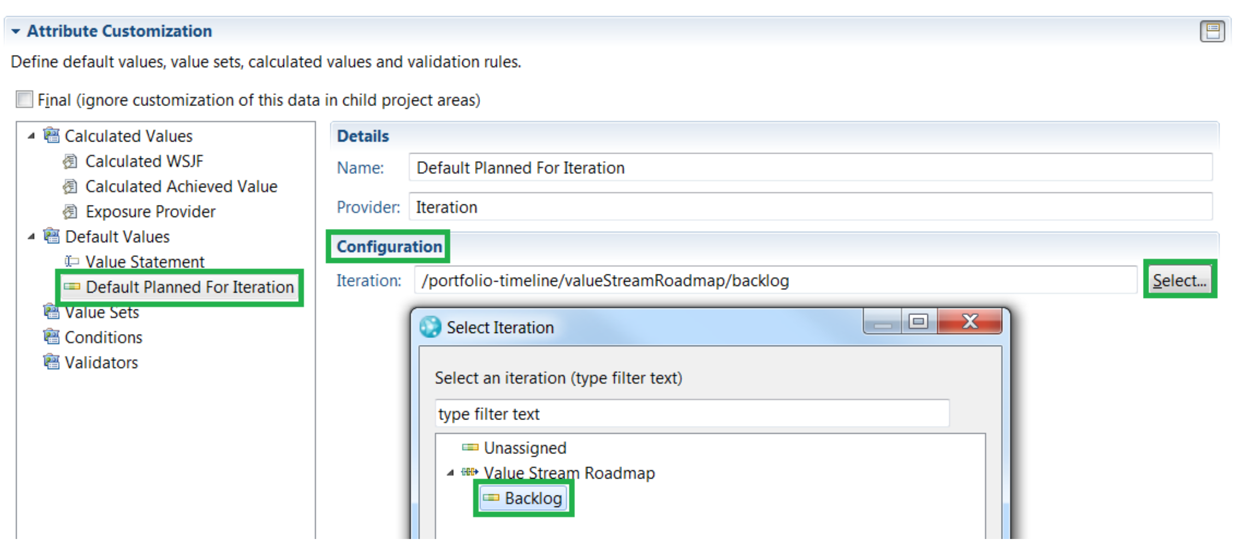
5. Repeat this to edit each of the **PI x** iterations and change the identifier to: `piX`



6. Click on the **Process Configuration** tab and navigate to **Project Configuration > Configuration Data > Work Items > Attribution Customization:**



7. Expand **Default Values** and click to edit **Default Planned For Iteration.** Change the Iteration value to `/portfolio-timeline/valueStreamRoadmap/backlog` by clicking **Select…** and choosing the Backlog iteration:



8. Save your changes.
9. Click on the **Process Configuration Source** tab.
10. Locate the *existing* XML section:

```
<followup-action xmlns="http://com.ibm.team.apt/setUpProject" description="Initializes the project
area with the plans." id="com.ibm.team.apt.service.setUpProject" name="Set Up Project for Plans">
```

11. Replace this entire **<plans>** section within that **<followup-action>** with this XML:

```
<plans>
```

```
        <plan iterationPath="/portfolio-timeline/valueStreamRoadmap" name="Portfolio Name (rename) Roadmap" typeId="com.ibm.team.apt.plantype.portfolioBacklog"/>
        <plan iterationPath="/portfolio-timeline/valueStreamRoadmap" name="Value Stream 1 (rename) Roadmap" ownerPath="Value Stream 1 (rename)" typeId="com.ibm.team.apt.plantype.valueStreamBacklog"/>
        <plan iterationPath="/portfolio-timeline/valueStreamRoadmap/valueStreamPICadence/pi1" name="Value Stream 1 (rename) PI 1" ownerPath="Value Stream 1 (rename)" typeId="com.ibm.team.apt.plantype.valueStreamBacklog"/>
        <plan iterationPath="/portfolio-timeline/valueStreamRoadmap" name="Value Stream 2 (rename) Roadmap" ownerPath="Value Stream 2 (rename)" typeId="com.ibm.team.apt.plantype.valueStreamBacklog"/>
        <plan iterationPath="/portfolio-timeline/valueStreamRoadmap/valueStreamPICadence/pi1" name="Value Stream 2 (rename) PI 1" ownerPath="Value Stream 2 (rename)" typeId="com.ibm.team.apt.plantype.valueStreamBacklog"/>
</plans>
```

12. Search for **<planmode id="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard"**:

```
<configuration-data xmlns="http://com.ibm.team.apt.configuration/planModes"
    <planmode id="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard"
        <columns>
```

13. Add a filter after the *<sortmode>* section:

```
<filters>
    <filter definition="com.ibm.team.apt.filter.excludeNonPortfolioEpics"/>
</filters>
```

14. Scroll to the **<viewmode**> and update the **"kanban-config"** parameter as follows:

```
<parameter key="kanban-config" value="{&quot;analysis&quot;:5,&quot;review&quot;:10}"/>
```

15. Search for **<planmode id="com.ibm.team.apt.viewmodes.internal.portfolioRoadmap"**:

```
<planmode id="com.ibm.team.apt.viewmodes.internal.portfolioRoadmap"
    <viewmode definition="com.ibm.team.apt.internal.viewmode.tree"
    <groupmode definition="com.ibm.team.apt.groupmode.none"/>
    <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
    <filters>
        <filter definition="com.ibm.team.apt.filter.resolved"/>
    </filters>
    <columns>
        <column attribute="com.ibm.team.apt.attribute.planitem.id"
        <column attribute="com.ibm.team.apt.attributes._com.ibm.tear
        <column attribute="com.ibm.team.apt.attribute.owner" width='
        <column attribute="com.ibm.team.apt.attribute.planitem.state
        <column attribute="com.ibm.team.apt.attribute.planitem.planr
        <column attribute="com.ibm.team.apt.attribute.planitem.filec
    </columns>
```

16. Update the **<viewmode>** section on the next line to look like this:

```
<viewmode definition="com.ibm.team.apt.internal.viewmode.tree" />
```

17. Update the columns shown in the Portfolio Roadmap report by copy-pasting the following section to replace the **<columns>** section:

```
                                    <columns>
                                            <column attribute="com.ibm.team.apt.attribute.planitem.id" width="10"/>
                                            <column attribute="com.ibm.team.apt.attribute.owner" width="15"/>
                                            <column attribute="com.ibm.team.apt.attribute.planitem.state" width="10"/>
                                            <column attribute="com.ibm.team.apt.attribute.planitem.plannedFor" width="15"/>
                                            <column attribute="com.ibm.team.apt.attribute.planitem.filedAgainst" width="15"/>
```

```
                                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" width="10" />
                                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" width="10" />
                                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal" width="10" />
                                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit" width="10"
/>
                                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe" width="10"/>
                                                    <column
attribute="planning/source/com.ibm.team.workitem.linktype.trackedworkitem/trackedBy"
width="10" />
                                            </columns>
```

18. Save your changes.
19. Search for **<plantype id="com.ibm.team.apt.plantype.portfolioBacklog"**:

```
<configuration-data xmlns="http://com.ibm.team.apt.configuration/planTypes" id="com.ibm.team.apt.configuration.plantypes">
    <plantype id="com.ibm.team.apt.plantype.portfolioBacklog" name="Portfolio Backlog" icon="icons/obj16/backlog_plan_obj.gif">
        <planitems definition="com.ibm.team.apt.planitems.projectReleasePlan" />
        <planmodes default="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard">
            <planmode definition="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard"/>
            <planmode definition="com.ibm.team.apt.viewmodes.internal.portfolioRoadmap"/>
        </planmodes>
    </plantype>
</configuration-data>
```

20. Add a new **<plantype>** section for the Value Stream plan type and modes by copy-pasting this XML after the *portfolioBacklog* **<plantype>** section:

```
                                <plantype id="com.ibm.team.apt.plantype.valueStreamBacklog"
name="Value Stream Backlog" icon="icons/obj16/backlog_plan_obj.gif">
                                            <planitems
definition="com.ibm.team.apt.planitems.projectReleasePlan" />
                                            <planmodes
default="com.ibm.team.apt.viewmodes.internal.valueStreamKanbanBoard">
                                                    <planmode
definition="com.ibm.team.apt.viewmodes.internal.valueStreamKanbanBoard"/>
                                                    <planmode
definition="com.ibm.team.apt.viewmodes.internal.capabilityKanbanBoard"/>
                                                    <planmode
definition="com.ibm.team.apt.viewmodes.internal.valueStreamRoadmap"/>
                                                    <planmode
definition="com.ibm.team.apt.viewmodes.internal.valueStreamWSJFRankedList"/>
                                            </planmodes>
                                </plantype>
```

21. Search for **<configuration-data xmlns="http://com.ibm.team.apt.configuration/planModes"**:

```
<configuration-data xmlns="http://com.ibm.team.apt.configuration/planModes" final="false" id="com.ibm.team.apt.configuration.planmodes">
    <planmode id="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard" name="Kanban View" progressMode="NONE">
```

22. Add a new set of **<planmode>** sections for the *Value Stream Kanban*, *Capability Kanban, Roadmap* and *WSJF Ranked List* plan views by copying and pasting this entire section at the bottom of the *planModes* configuration section:

```
                                                                        <planmode
id="com.ibm.team.apt.viewmodes.internal.valueStreamKanbanBoard" name="Value Stream Kanban
View" progressMode="NONE">
                                <columns>
```

```
                                  <column attribute="com.ibm.team.apt.attribute.summary"
width="100">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column attribute="com.ibm.team.apt.attribute.owner"
width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attribute.planitem.plannedFor" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="false"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="false"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="false"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="false"/>
```

```
                                        <parameter key="LARGE" value="true"/>
                                    </parameters>
                                </column>
                                <column
attribute="planning/source/com.ibm.team.workitem.linktype.parentworkitem" width="0">
                                    <parameters>
                                        <parameter key="SMALL" value="false"/>
                                        <parameter key="MEDIUM" value="true"/>
                                        <parameter key="LARGE" value="true"/>
                                    </parameters>
                                </column>
                                <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.apt.attribute.planitem.blocked"
width="0">
                                    <parameters>
                                        <parameter key="SMALL" value="true"/>
                                        <parameter key="MEDIUM" value="true"/>
                                        <parameter key="LARGE" value="true"/>
                                    </parameters>
                                </column>
                            </columns>
                            <viewmode
definition="com.ibm.team.apt.internal.viewmode.kanban">
                                <parameters>
                                   <parameter key="State Group &lt;open&gt;" value="true"/>
                                   <parameter key="State Group &lt;backlog&gt;"
value="true"/>
                                   <parameter key="State Group &lt;inprogress&gt;"
value="true"/>
                                   <parameter key="State Group &lt;invalid&gt;"
value="true"/>
                                   <parameter key="State Group &lt;done&gt;" value="true"/>
                                   <parameter key="State Group &lt;implementation&gt;"
value="true"/>
                                    <parameter key="closed-Closed" value="true"/>

                                          <parameter key="kanban-config"
value="{&quot;review&quot;:10,&quot;analysis&quot;:5}"/>
                                </parameters>
                            </viewmode>
                            <filters>
                                          <filter
definition="com.ibm.team.apt.filter.excludeNonValueStreamEpics"/>
                                   </filters>
                            <groupmode definition="com.ibm.team.apt.groupmode.none"/>
                             <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
                        </planmode>
                           <planmode
id="com.ibm.team.apt.viewmodes.internal.capabilityKanbanBoard" name="Capability Kanban View"
progressMode="NONE">
                            <columns>
                                <column attribute="com.ibm.team.apt.attribute.summary"
width="100">
                                    <parameters>
                                        <parameter key="SMALL" value="true"/>
                                        <parameter key="MEDIUM" value="true"/>
                                        <parameter key="LARGE" value="true"/>
                                    </parameters>
                                </column>
                                <column attribute="com.ibm.team.apt.attribute.owner"
width="0">
```

```
                                        <parameters>
                                            <parameter key="SMALL" value="true"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="true"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="planning/source/com.ibm.team.workitem.linktype.parentworkitem" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.apt.attribute.planitem.blocked"
width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="true"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
```

```
                                        </parameters>
                                    </column>
                                </columns>
                                <viewmode
definition="com.ibm.team.apt.internal.viewmode.kanban">
                                    <parameters>
                                      <parameter key="State Group &lt;open&gt;" value="true"/>
                                      <parameter key="State Group &lt;review&gt;" value="true"/>
                                      <parameter key="State Group &lt;inprogress&gt;"
value="true"/>
                                      <parameter key="State Group &lt;invalid&gt;"
value="true"/>
                                      <parameter key="State Group &lt;done&gt;" value="true"/>
                                        <parameter key="analysis-Approved" value="true"/>
                                        <parameter key="closed-Closed" value="true"/>

                                              <parameter key="kanban-config"
value="{&quot;analysis&quot;:10}"/>
                                    </parameters>
                                </viewmode>

                                <groupmode definition="com.ibm.team.apt.groupmode.none"/>
                                <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
                                <filters>
                                              <filter
definition="com.ibm.team.apt.filter.excludeNonCapabilities"/>
                                      </filters>
                            </planmode>

                                <planmode
id="com.ibm.team.apt.viewmodes.internal.valueStreamRoadmap" name="Roadmap"
progressMode="NONE">
                                      <viewmode
definition="com.ibm.team.apt.internal.viewmode.tree" />
                                      <groupmode definition="com.ibm.team.apt.groupmode.none"/>
                                      <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
                                      <filters>
                                              <filter
definition="com.ibm.team.apt.filter.resolved"/>
                                      </filters>
                                      <columns>
                                              <column
attribute="com.ibm.team.apt.attribute.planitem.id" />
                                              <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" />
                                              <column
attribute="com.ibm.team.apt.attribute.planitem.ownedBy" />
                                              <column
attribute="com.ibm.team.apt.attribute.planitem.state" />
                                              <column
attribute="com.ibm.team.apt.attribute.planitem.plannedFor" />
                                      </columns>
                                </planmode>
                                <planmode
id="com.ibm.team.apt.viewmodes.internal.valueStreamWSJFRankedList" name="WSJF Ranked List"
progressMode="NONE">
                                      <viewmode
definition="com.ibm.team.apt.internal.viewmode.backlog" />
                                      <groupmode definition="com.ibm.team.apt.groupmode.none"/>
                                      <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
                                      <filters>
```

```
                                            <filter
definition="com.ibm.team.apt.filter.resolved"/>
                                            <filter
definition="com.ibm.team.apt.filter.excludeNonCapabilities"/>
                                    </filters>
                                    <columns>
                                            <column
attribute="com.ibm.team.apt.attribute.planitem.id" />
                                            <column
attribute="com.ibm.team.apt.attribute.planitem.state" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal"/>
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit"/>
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe"/>
                                    </columns>
                            </planmode>
```

23. Finally, update all of the plan views that currently display the *WSJF (integer)* attribute so that they now show the new decimal version of that attribute. In the **Process Configuration Source**, find and replace all instances of:

    ```
    <column attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf"
    ```

    with

    ```
    <column attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjfDecimal"
    ```

24. Save your changes.

PLAN FILTERS

In this section, we add the filters required by the plan models.

1. Search for **<configuration-data final="false" id="com.ibm.team.apt.configuration.planConfigurationElement"**:

    ```
    <configuration-data final="false" id="com.ibm.team.apt.configuration.planConfigurationElement" :
        <groupmode id="_MrD5cNP3EeWj2Oxwehw10w" implementation="com.ibm.team.apt.shared.ui.internal
            <parameters>
                <parameter key="attribute" value="com.ibm.team.apt.attributes._com.ibm.team.workitem
    ```

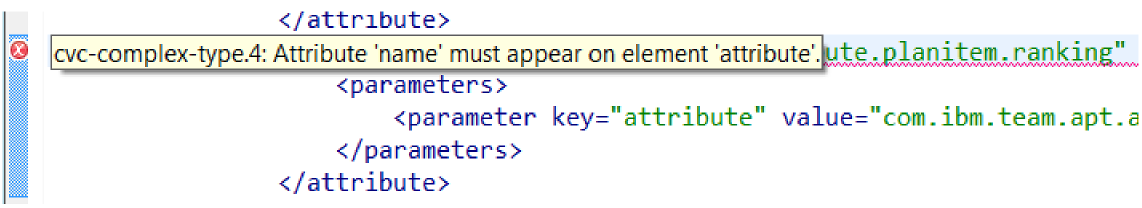
    Note: Your **groupmode id** may not be the same.

2. Add a new set of **<filter>** sections for the *excludeNonPortfolioEpics, excludeNonCapabilities* and *excludeNonValueStreamEpics* filters by copying and pasting this entire section into the *planConfigurationElement* section (at the top or the bottom, doesn't matter):

```
                          <filter description="Exclude all work item types except portfolio
epics." id="com.ibm.team.apt.filter.excludeNonPortfolioEpics"
implementation="com.ibm.team.apt.shared.ui.internal.filter.WorkItemTypeFilter" name="All
except portfolio epics">
                                    <parameters>
```

```
                                            <parameter key="include-types"
value="com.ibm.team.workitem.workItemType.portfolioEpic"/>
                                    </parameters>
                             </filter>

                          <filter description="Exclude all work item types except
capabilities." id="com.ibm.team.apt.filter.excludeNonCapabilities"
implementation="com.ibm.team.apt.shared.ui.internal.filter.WorkItemTypeFilter" name="All
except capabilities">
                                    <parameters>
                                            <parameter key="include-types"
value="com.ibm.team.workitem.workItemType.capability"/>
                                    </parameters>
                             </filter>
                             <filter description="Exclude all work item types except value
stream epics." id="com.ibm.team.apt.filter.excludeNonValueStreamEpics"
implementation="com.ibm.team.apt.shared.ui.internal.filter.WorkItemTypeFilter" name="All
except value stream epics">
                                    <parameters> Team 1 (rename)
                                            <parameter key="include-types"
value="com.ibm.team.workitem.workItemType.valueStreamEpic"/>
                                    </parameters>
                             </filter>
```

3. Save your changes.
4. Finally, resolve a potential issue with the Ranking Attribute. Search for **<attribute id="com.ibm.team.apt.attribute.planitem.ranking":**



5. If you see the error (as above), replace this entire section by copy-pasting the following:

```
                          <attribute id="com.ibm.team.apt.attribute.planitem.ranking"
implementation="com.ibm.team.apt.shared.client.RankingAttribute" internal="false"
name="User/Business Value" readOnly="false" type="RANKING">
                              <parameters>
                                  <parameter key="attribute"
value="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal"/>
                              </parameters>
                          </attribute>
```

6. Save your changes.

DASHBOARD

Update SAFe V4.0 Program Process Template

> ***Note:*** *In the following sections, you will be copying and pasting XML source into the Process Configuration Source. Unless otherwise indicated, you can paste that source at the end of any section, taking care to ensure that the formatting is correct and no XML errors are introduced.*

PLANS

In this section, we update the Program Kanban plan view and add new Feature Kanban plan view.

1. In the **My SAFe V4.0 Program Process**, click on the **Process Configuration Source** tab.
2. Locate the *existing* XML section:

```
<followup-action xmlns="http://com.ibm.team.apt/setUpProject" description="Initializes the project
area with the plans." id="com.ibm.team.apt.service.setUpProject" name="Set Up Project for Plans">
```

3. Replace this entire **<plans>** section within that **<followup-action>** with this XML:

```
<plans>
<plan iterationPath="/program-timeline/roadmap/backlog" name="Program Name (rename) Backlog"
typeId="com.ibm.team.apt.plantype.programBacklog"/>
<plan iterationPath="/program-timeline/roadmap/backlog" name="Team 1 (rename) Backlog" ownerPath="Team 1
(rename)" typeId="com.ibm.team.apt.plantype.product.backlog"/>
<plan iterationPath="/program-timeline/roadmap/backlog" name="Team 2 (rename) Backlog" ownerPath="Team 2
(rename)" typeId="com.ibm.team.apt.plantype.product.backlog"/>
<plan iterationPath="/program-timeline/roadmap" name="Program Name (rename) Roadmap"
typeId="com.ibm.team.apt.plantype.programBacklog"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1" name="Program Name (rename) PI 1"
typeId="com.ibm.team.apt.plantype.programBacklog"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.1" name="Team 1 (rename) Sprint 1.1"
ownerPath="Team 1 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.1" name="Team 2 (rename) Sprint 1.1"
ownerPath="Team 2 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.2" name="Team 1 (rename) Sprint 1.2"
ownerPath="Team 1 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.2" name="Team 2 (rename) Sprint 1.2"
ownerPath="Team 2 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.3" name="Team 1 (rename) Sprint 1.3"
ownerPath="Team 1 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
<plan iterationPath="/program-timeline/roadmap/art/pi1/pi1-s1.3" name="Team 2 (rename) Sprint 1.3"
ownerPath="Team 2 (rename)" typeId="com.ibm.team.apt.plantype.default"/>
</plans>
```

4. Search for **<plantype id="com.ibm.team.apt.plantype.programBacklog"**:

```
<configuration-data xmlns="http://com.ibm.team.apt.configuration/planTypes" id="com.ibm.team.apt.configuration.plantypes">
    <plantype id="com.ibm.team.apt.plantype.portfolioBacklog" name="Portfolio Backlog" icon="icons/obj16/backlog_plan_obj.gif">
        <planitems definition="com.ibm.team.apt.planitems.projectReleasePlan" />
        <planmodes default="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard">
            <planmode definition="com.ibm.team.apt.viewmodes.internal.portfolioKanbanBoard"/>
            <planmode definition="com.ibm.team.apt.viewmodes.internal.portfolioRoadmap"/>
        </planmodes>
    </plantype>
</configuration-data>
```

5. Add a new **<planmode>** section for the Feature Kanban Board plan view by copy-pasting the following into the **<planmodes>** section for the *programKanbanBoard*

```
<planmode definition="com.ibm.team.apt.viewmodes.internal.featureKanbanBoard"/>
```

6. Search for `<planmode id="com.ibm.team.apt.viewmodes.internal.programKanbanBoard":`

```
</planmode>
<planmode id="com.ibm.team.apt.viewmodes.internal.programKanbanBoard" name="Kanban View" progressMode="NONE">
    <columns>
        <column attribute="com.ibm.team.apt.attribute.summary" width="100">
            <parameters>
                <parameter key="SMALL" value="true"/>
                <parameter key="MEDIUM" value="true"/>
                <parameter key="LARGE" value="true"/>
            </parameters>
        </column>
```

7. Change the name of this view to `Program Kanban View`:

```
<planmode id="com.ibm.team.apt.viewmodes.internal.programKanbanBoard" name="Program Kanban
View" progressMode="NONE">
```

8. Scroll down to the **<viewmode>** section and copy-paste the following to replace that entire section:

```
<viewmode definition="com.ibm.team.apt.internal.viewmode.kanban">
                              <parameters>
                                 <parameter key="State Group &lt;open&gt;" value="true"/>
                                 <parameter key="State Group &lt;backlog&gt;"
value="true"/>
                                 <parameter key="State Group &lt;inprogress&gt;"
value="true"/>
                                 <parameter key="State Group &lt;invalid&gt;"
value="true"/>
                                 <parameter key="State Group &lt;done&gt;" value="true"/>
                                 <parameter key="State Group &lt;implementation&gt;"
value="true"/>
                                   <parameter key="closed-Closed" value="true"/>

                                         <parameter key="kanban-config"
value="{&quot;review&quot;:10,&quot;analysis&quot;:5}"/>
                              </parameters>
                          </viewmode>
```

9. Search for `<planmode id="com.ibm.team.apt.viewmodes.internal.programRoadmap":`

```
</planmode>
<planmode id="com.ibm.team.apt.viewmodes.internal.programRoadmap"
    <viewmode definition="com.ibm.team.apt.internal.viewmode.tree"
    <groupmode definition="com.ibm.team.apt.groupmode.none"/>
    <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
    <filters>
        <filter definition="com.ibm.team.apt.filter.resolved"/>
    </filters>
    <columns>
        <column attribute="com.ibm.team.apt.attribute.planitem.id"
        <column attribute="com.ibm.team.apt.attributes._com.ibm.te
        <column attribute="com.ibm.team.apt.attribute.owner" />
        <column attribute="com.ibm.team.apt.attribute.planitem.sta
        <column attribute="com.ibm.team.apt.attribute.planitem.pla
    </columns>
```

10. Update the columns shown in the Program Roadmap report by copy-pasting the following section to replace the **<columns>** section:

```
                                 <columns>
                                         <column
attribute="com.ibm.team.apt.attribute.planitem.id" width="10"/>
                                         <column
attribute="com.ibm.team.apt.attribute.owner" width="15"/>
```

```
                                            <column
attribute="com.ibm.team.apt.attribute.planitem.state" width="10"/>
                                            <column
attribute="com.ibm.team.apt.attribute.planitem.plannedFor" width="15"/>
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" width="10" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" width="10" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal" width="10" />
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit" width="10"
/>
                                            <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe" width="10"/>
                                            <column
attribute="planning/source/com.ibm.team.workitem.linktype.trackedworkitem/trackedBy"
width="10" />
                                    </columns>
```

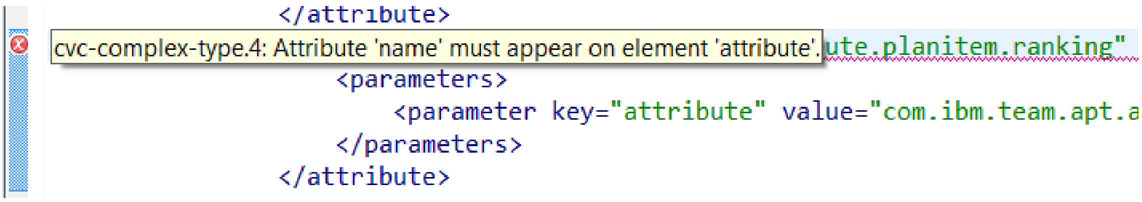
11. Add a new **<planmode>** for the Feature Kanban plan view by copy-pasting this entire section (after the “Architectural Runway” plan mode is fine):

```
                              <planmode
id="com.ibm.team.apt.viewmodes.internal.featureKanbanBoard" name="Feature Kanban View"
progressMode="NONE">
                              <columns>
                                  <column attribute="com.ibm.team.apt.attribute.summary"
width="100">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column attribute="com.ibm.team.apt.attribute.owner"
width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.wsjf" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="true"/>
                                          <parameter key="MEDIUM" value="true"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
                                  <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.jobSize" width="0">
                                      <parameters>
                                          <parameter key="SMALL" value="false"/>
                                          <parameter key="MEDIUM" value="false"/>
                                          <parameter key="LARGE" value="true"/>
                                      </parameters>
                                  </column>
```

```
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.timeCrit" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.rroe" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="false"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="planning/source/com.ibm.team.workitem.linktype.parentworkitem" width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="false"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                    <column
attribute="com.ibm.team.apt.attributes._com.ibm.team.apt.attribute.planitem.blocked"
width="0">
                                        <parameters>
                                            <parameter key="SMALL" value="true"/>
                                            <parameter key="MEDIUM" value="true"/>
                                            <parameter key="LARGE" value="true"/>
                                        </parameters>
                                    </column>
                                </columns>
                                <viewmode
definition="com.ibm.team.apt.internal.viewmode.kanban">
                                    <parameters>
                                       <parameter key="State Group &lt;open&gt;" value="true"/>
                                       <parameter key="State Group &lt;review&gt;" value="true"/>
                                       <parameter key="State Group &lt;inprogress&gt;"
value="true"/>

                                       <parameter key="State Group &lt;invalid&gt;"
value="true"/>

                                       <parameter key="State Group &lt;done&gt;" value="true"/>
                                        <parameter key="analysis-Approved" value="true"/>
                                        <parameter key="closed-Closed" value="true"/>

                                              <parameter key="kanban-config"
value="{&quot;analysis&quot;:10}"/>
                                    </parameters>
                                </viewmode>

                                <groupmode definition="com.ibm.team.apt.groupmode.none"/>
```

```
                              <sortmode definition="com.ibm.team.apt.sortmode.wsjf"/>
                              <filters>
                                             <filter
definition="com.ibm.team.apt.filter.excludeNonFeatures"/>
                                     </filters>
                          </planmode>
```

12. Save your changes.
13. Finally, resolve a potential issue with the Ranking Attribute. Search for **`<attribute id="com.ibm.team.apt.attribute.planitem.ranking":`**



14. If you see the error (as above), replace this entire section by copy-pasting the following:

```
                          <attribute id="com.ibm.team.apt.attribute.planitem.ranking"
implementation="com.ibm.team.apt.shared.client.RankingAttribute" internal="false"
name="User/Business Value" readOnly="false" type="RANKING">
                              <parameters>
                                  <parameter key="attribute"
value="com.ibm.team.apt.attributes._com.ibm.team.workitem.attribute.ubVal"/>
                              </parameters>
                          </attribute>
```

15. Save your changes.

DASHBOARD

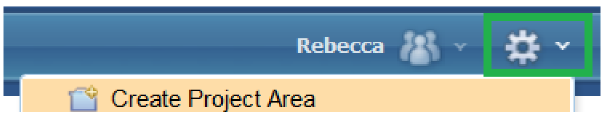
> ***Note:*** *In the following sections, you will be copying and pasting XML source into the Process Configuration Source. Unless otherwise indicated, you can paste that source at the end of any section, taking care to ensure that the formatting is correct and no XML errors are introduced.*

Yay! You did it! You now have “master” project areas for SAFe V4.0 Portfolio and Program or your own customized process templates. You can export your new templates in the **Application Administration > Templates** section of the browser. Have at it!

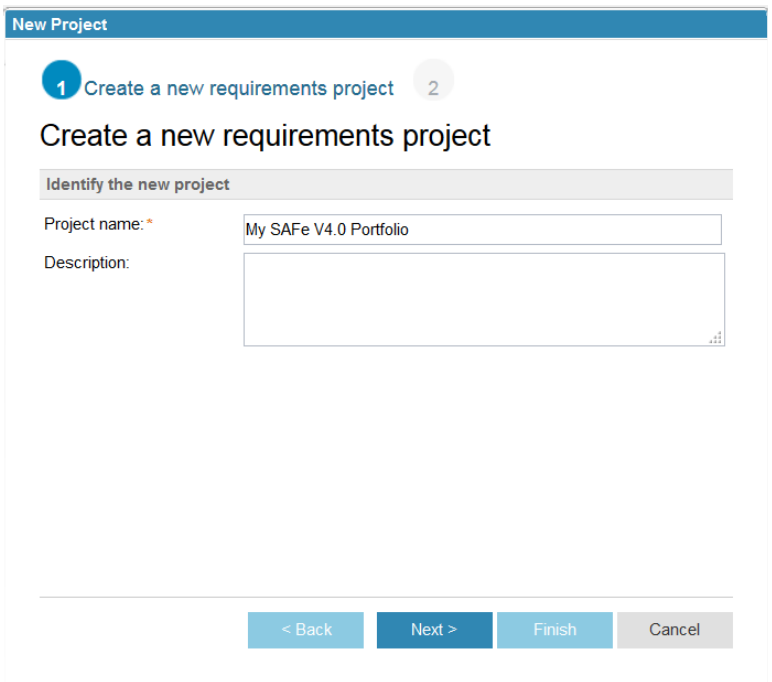
RATIONAL DOORS NEXT GENERATION SAFE V4.0 TEMPLATE CONFIGURATION

To configure an RDNG project area that supports SAFe V4.0, you start by configuring a project area based on the SAFe V3.0 project template. You then will apply changes as documented in this section and save your new project template that can be used for new RDNG project areas for the SAFe V4.0 portfolio.

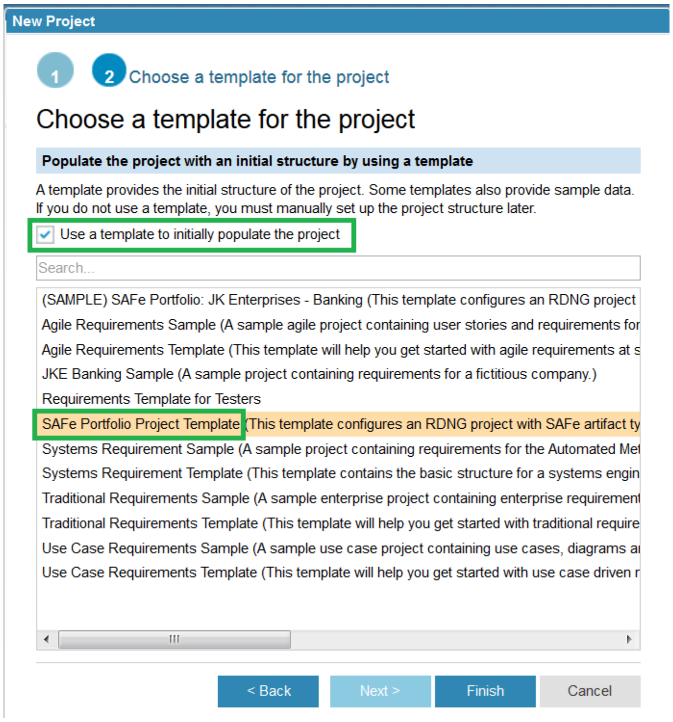
1. Launch RDNG in your browser and logon on as an administrator. Navigate to the **All Projects** view.
2. Select *Create Project Area* from the **Administration** drop-down menu option:



3. In the **New Project** wizard, specify a name: `My SAFe V4.0 Portfolio`. Click Next.



4. Click **Use a template to initially populate the project** and select the **SAFe Portfolio Project Template**. Click Finish.

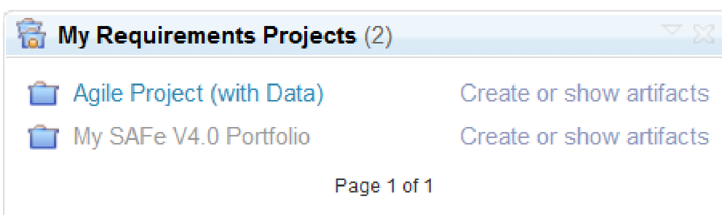


5. Repeat the steps above to create a new project area based on the *Agile Requirements* project template:

   Name: `Agile Project (with data)`, **Template:** `Agile Requirements Sample`

   You will harvest new artifacts for your SAFe V4.0 project template from these templates.

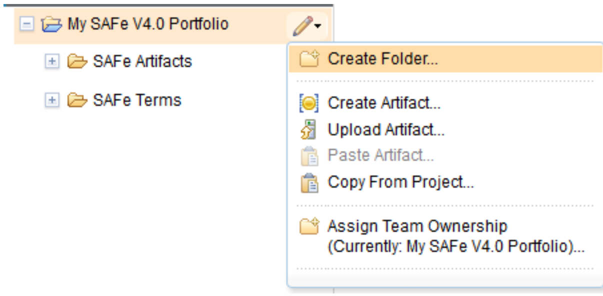
6. On your dashboard, you should see all of the project areas you've created in the **My Requirements Projects** widget:



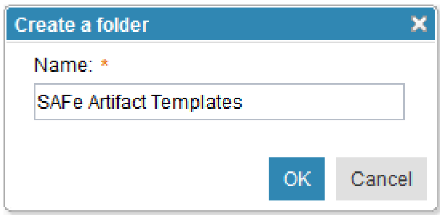
FOLDERS

In this section, you update the folder structure to provide a place to store the artifact templates.

1. Click on the ***Create or show artifacts*** link next to **My SAFe V4.0 Portfolio** in the **My Requirements Projects** widget to launch the artifact browser.
1. In the **Filter by Folder** pane on the left, select the **My SAFe V4.0 Portfolio**, right-click and select *Create Folder…* :

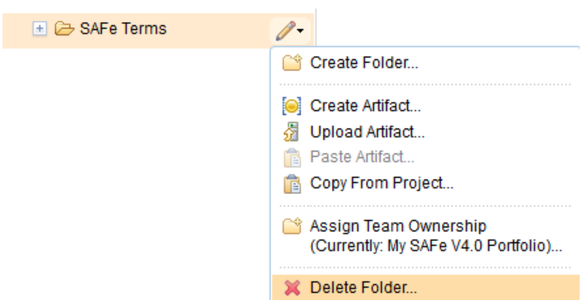


2. Provide the folder **Name:** `SAFe Artifact Templates`

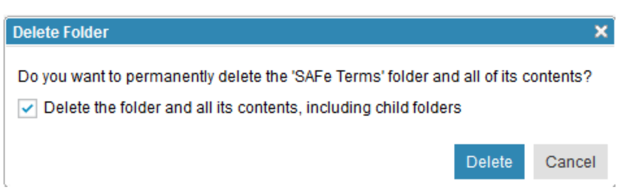


Click **OK**.

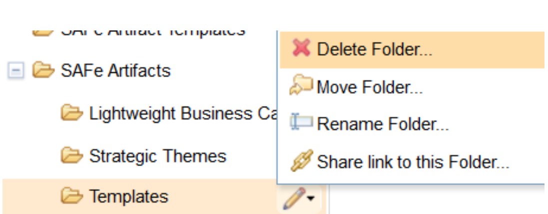
3. Select the **SAFe Terms** folder, right-click and select *Delete Folder…* :



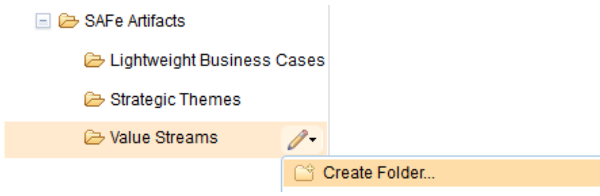
4. Check the **Delete the folder and all its contents, including child folders** checkbox, then click **Delete**:



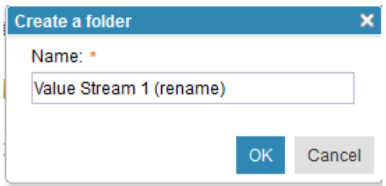
5. Expand the **SAFe Artifacts** folder, then right-click on the **Templates** folder and select *Delete Folder…* , confirming that you want to delete the folder and all of its contents:



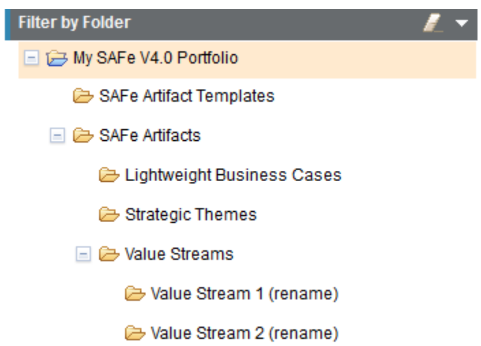
6. Select **Value Streams** and right-click to *Create Folder…* :



7. Specify the **Name:** `Value Stream 1 (rename)`



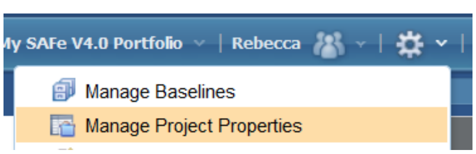
8. Create another folder within the **Value Stream** folder with **Name:** `Value Stream 2 (rename)`. These will serve as placeholders as you add Value Streams and associated artifacts. Your new folder structure should look like this:



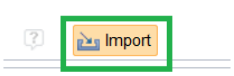
IMPORT ARTIFACTS

Before configuring the SAFe RDNG project template, import artifacts from the *Agile Project (with data)* project area. You will end up with some extraneous configuration artifacts, but we want to harvest some key artifacts for SAFe.

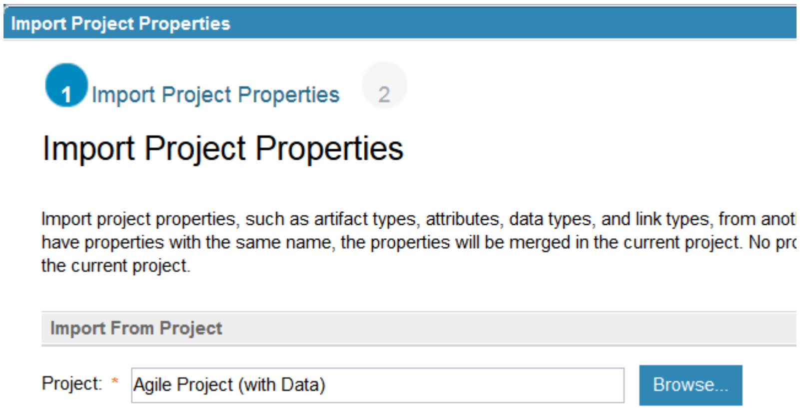
1. Select *Manage Project Properties* from the **Administration** drop-down menu:



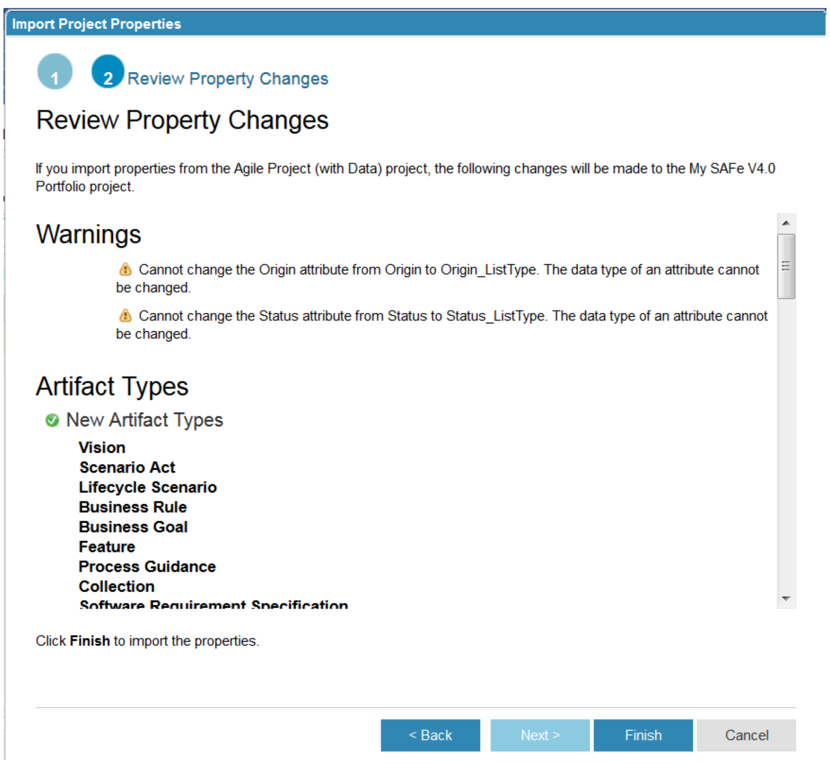
2. In the menu bar, select **Import**:



3. In the **Import Project Properties** dialog, click the **Browse...** button and select *Agile Project (with data):*



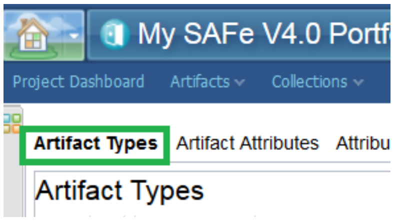
4. Click **Next.** The **Review Property Changes** page shows the set of things that will be changed when you complete the import. Click **Finish** and then **Close.**



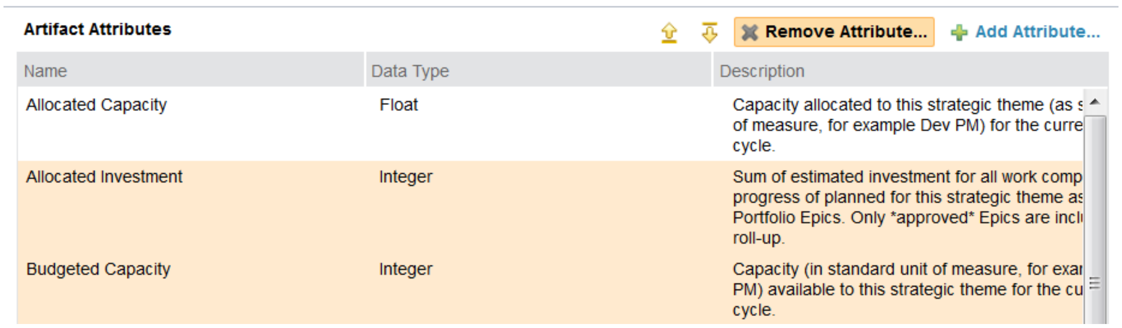
ATTRIBUTES

In this section, you will change the data type for some attributes. In order to do this, you actually must delete and recreate them. First, you must remove them from existing artifacts.

1. Select **Artifact Types** from the menu bar:

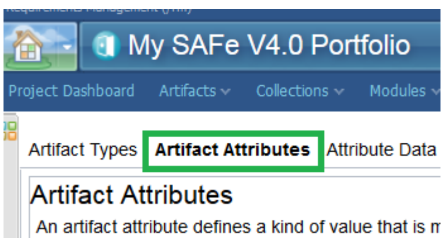


2. Navigate to the *[SAFe] Strategic Theme* artifact and select it for editing. In the **Artifact Attributes** box, select *Allocated Invesment* and *Budgeted Capacity* and click X **Remove Attribute:**

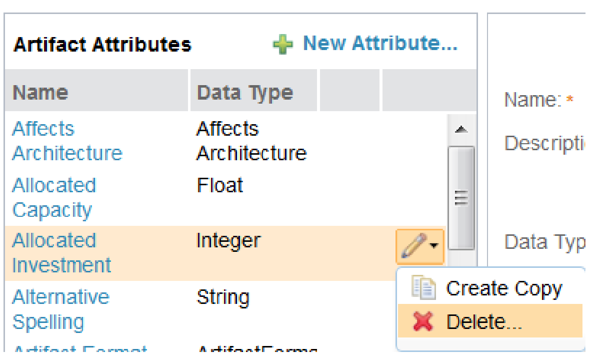


3. Click **Yes** to confirm the deletion. Save your changes.

4. Select **Attribute Types** from the menu bar:



5. In the **Artifact Attributes** box, navigate to the *Allocated Investment* attribute and then use the pencil icon to select **Delete**



6. Click **Yes** to confirm the deletion. Save your changes. Repeat this process to delete the *Budgeted Capacity* attribute.
7. Click + **New Attribute...** on the top right of the **Artifact Attributes** box to add new attributes:

ALLOCATED INVESTMENT

Name: `Allocated Investment`

Description: `Sum of estimated investment for all work completed, in progress of planned for this strategic theme as roll up from Portfolio Epics. Only *approved* Epics are included in the roll-up.`

Data Type: `Float`

BUDGETED CAPACITY

Name: `Budgeted Capacity`

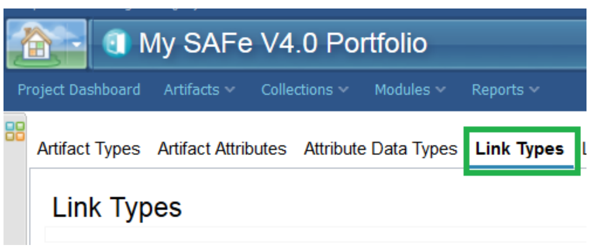
Description: `Capacity (in standard unit of measure, for example Dev PM) available to a Value Stream or Program for the current budget cycle.`

Data Type: `Float`

8. Save your changes.

LINK TYPES

1. Select **Link Types** from the menu bar:



2. Click **+ Add...** on the top right of the **Link Types** box to add new link types: 

REALIZES

Name: `Realizes`

Description: `SAFe link type to indicate that that Strategic Themes are realized by Value Streams.`

Provide directional labels for the relationship: `<checked>`

A to B: `Realizes`

B to A: `Realized By`

INFORMS

Name: `Informs`

Description: `SAFe link type to indicate that Solution Intent and Solution Context inform each other.`

> ***Note:*** *In this section, you will be setting up "preferred link types", which include the OSLC link types, such as "Implemented By". You may not have these types available if you have not associated your RDNG project area with RTC and RQM projects (such as by creating a CLM Lifecycle Project Area). This does not cause a problem ultimately; preferred link types are merely a convenience.*

Provide directional labels for the relationship: `<checked>`
A to B: `Informs`
B to A: `Informs`

3. Your **Link Types** table now shows these new SAFe link types:

Realizes	Realizes / Realized By	SAFe link type to indicate that that Strategic Themes are realized by Value Streams.
Informs	Informs / Informs	SAFe link type to indicate that Solution Intent and Solution Context inform each other.

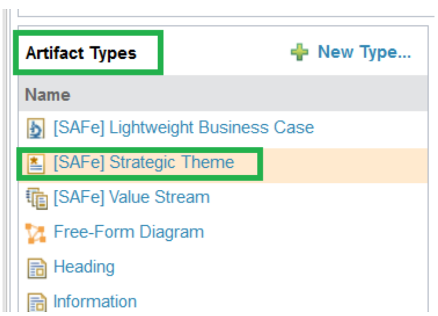
UPDATE EXISTING ARTIFACT TYPES

In this section, you will update existing artifact types that are already in your project area.

STRATEGIC THEME

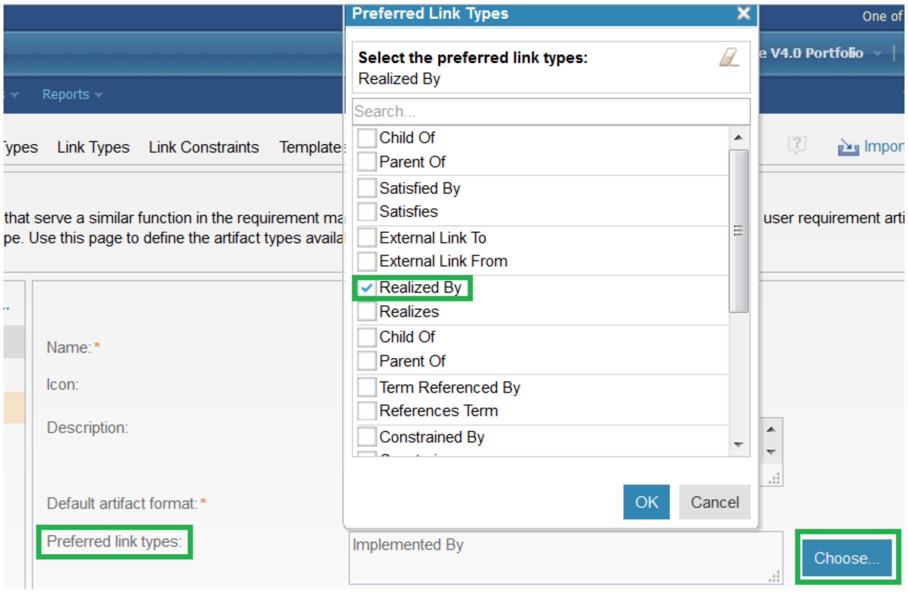
1. Select **Artifact Types** from the menu bar:

1. In the **Artifact Types** pane, select *[SAFe] Strategic Theme*:

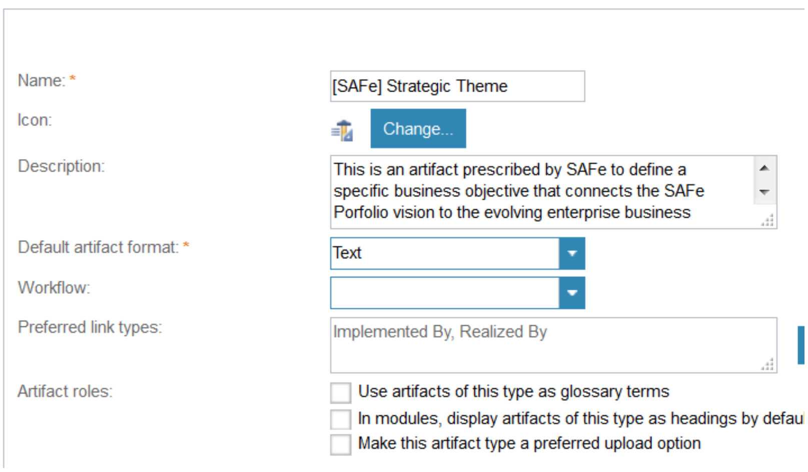


2. Click the **Change…** button next to *Icon* to change the icon to something other than the *Vision* icon (which will be used in the Vision artifact later). For example, we use *Design Brief*:

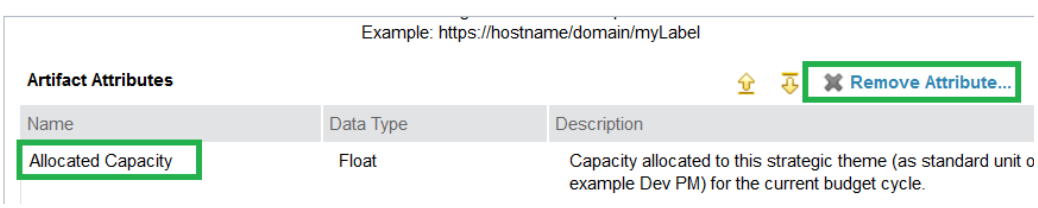
3. Select the **Choose…** button next to *Preferred link types:* and select *Realized By* (leave *Implemented By* selected):



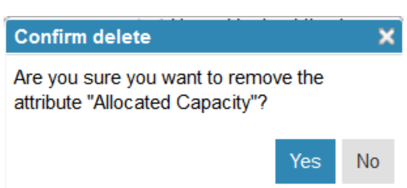
4. Click **OK.** Your updated *Strategic Theme* looks like this:



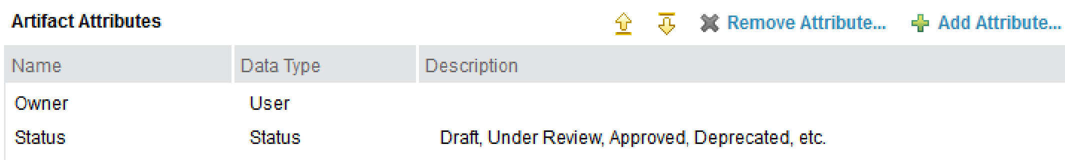
5. In the **Artifact Attributes** pane, select the *Allocated Capacity* attribute and click **X Remove Attribute…:**



6. Click **Yes** to confirm the deletion:



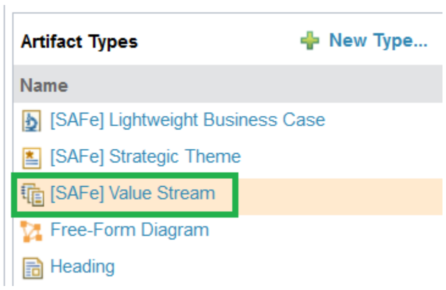
7. Repeat this procedure to remove *Budgeted Investment* and *Total Market Opportunity*. The remaining attributes list should look like this:



8. Click **Save** to save your changes.

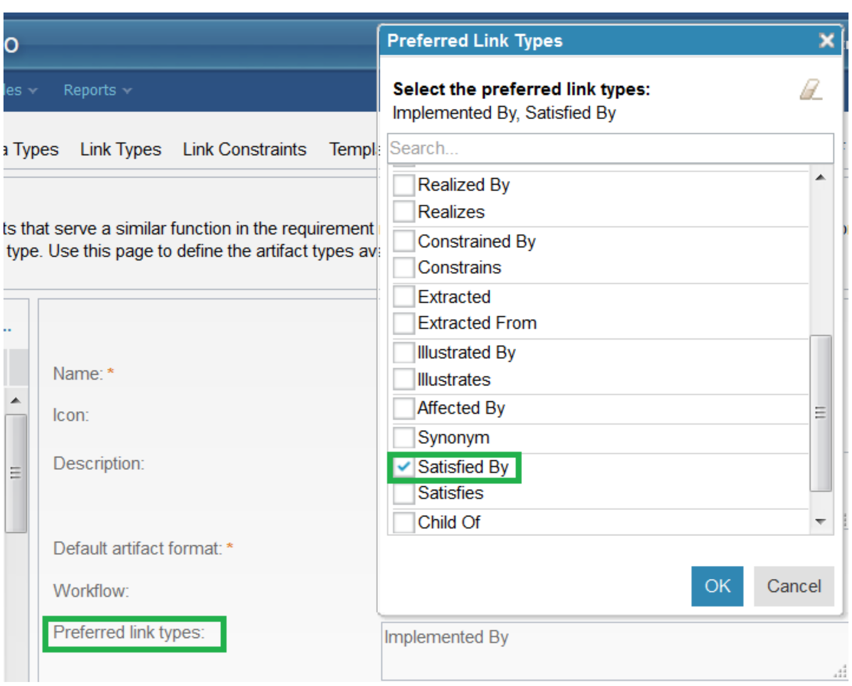
VALUE STREAM

1. In the **Artifact Types** pane, select *[SAFe] Value Stream*:

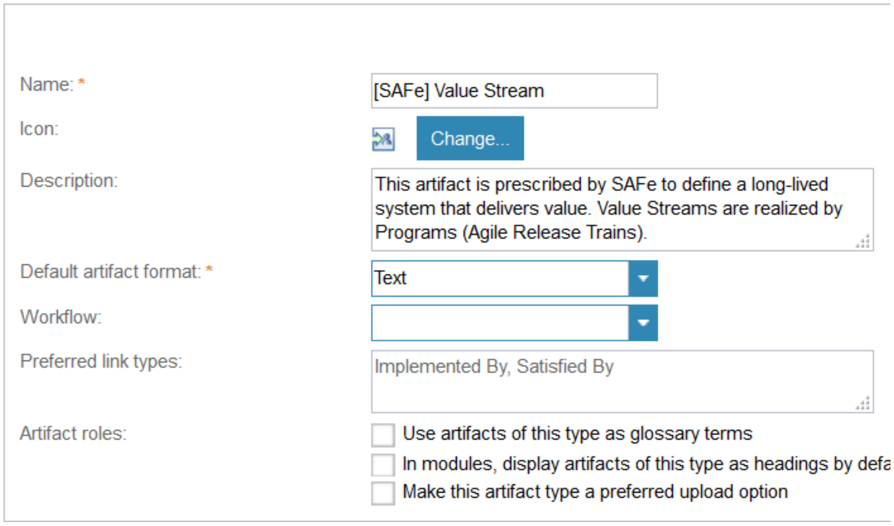


2. Click the **Change…** button next to *Icon* to change the icon to something other than the *Set* icon (which is used in the Collection artifact later). For example, we use *Customer Input*:

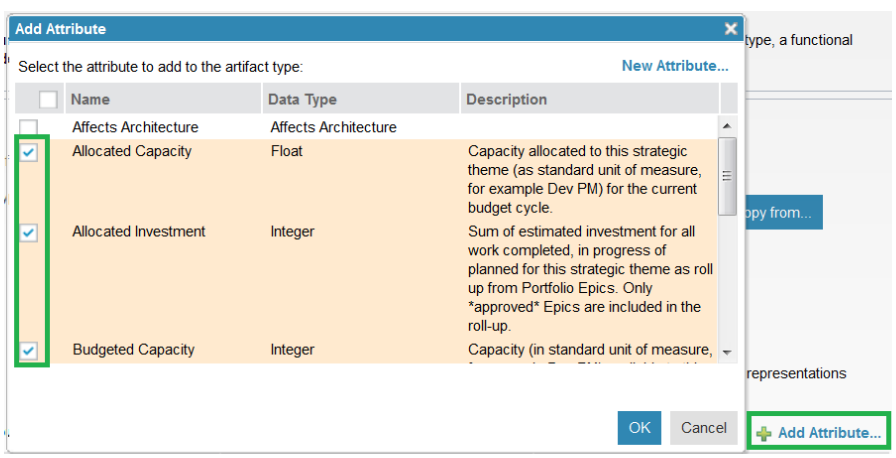
3. Select the **Choose…** button next to *Preferred link types:* and add *Satisfied By* (leave *Implemented By* selected):



4. Click **OK.** Your updated *Value Stream* looks like this:

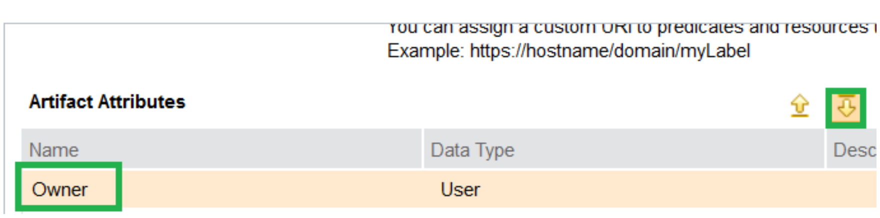


5. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Allocated Capacity, Allocated Investment, Budgeted Capacity, Budgeted Investment, Status,* and *Total Market Opportunity* :

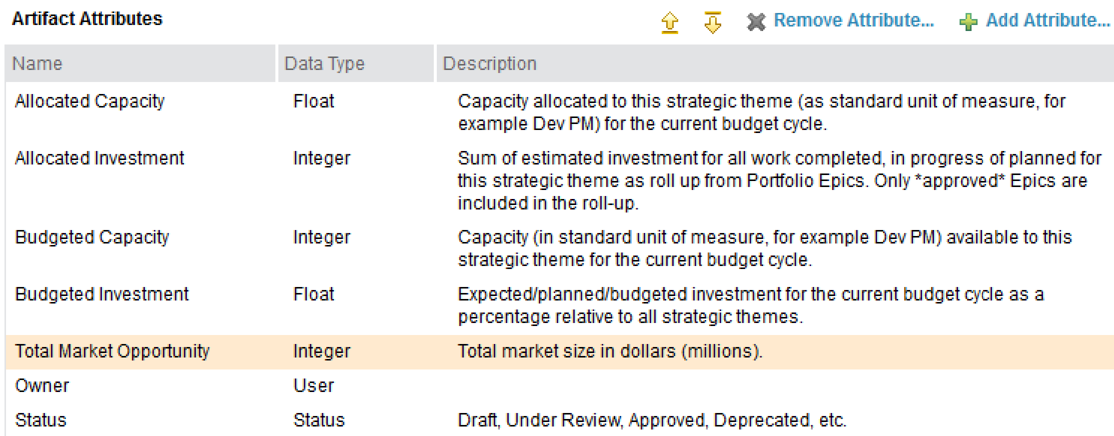


Note that you will need to scroll down to select the additional attributes.

6. Click **OK.** Select *Owner* to move it down just above *Status* using the down arrow:



7. Select *Total Market Opportunity* and move it above *Owner*.
8. The resulting set of attributes should look like this:



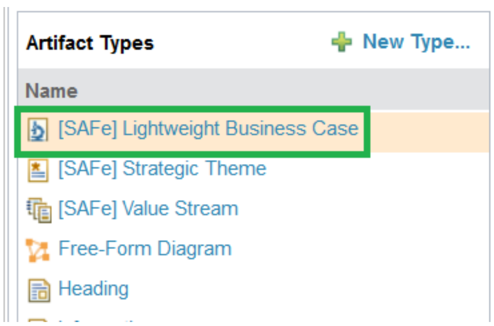
Artifact Attributes — Remove Attribute... — Add Attribute...

Name	Data Type	Description
Allocated Capacity	Float	Capacity allocated to this strategic theme (as standard unit of measure, for example Dev PM) for the current budget cycle.
Allocated Investment	Integer	Sum of estimated investment for all work completed, in progress of planned for this strategic theme as roll up from Portfolio Epics. Only *approved* Epics are included in the roll-up.
Budgeted Capacity	Integer	Capacity (in standard unit of measure, for example Dev PM) available to this strategic theme for the current budget cycle.
Budgeted Investment	Float	Expected/planned/budgeted investment for the current budget cycle as a percentage relative to all strategic themes.
Total Market Opportunity	Integer	Total market size in dollars (millions).
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.

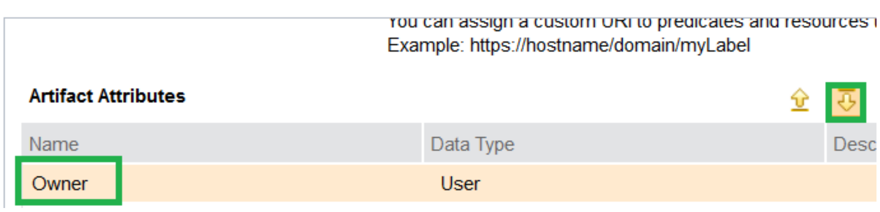
9. Click **Save** to save your changes.

Lightweight Business Case

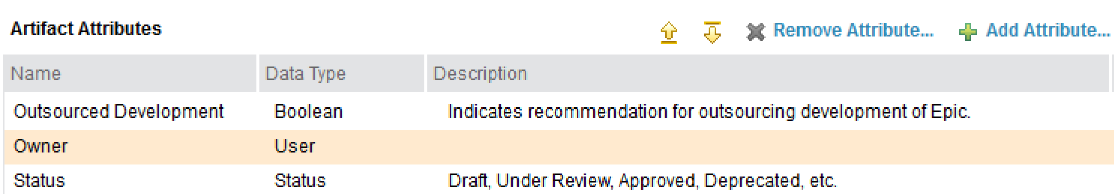
1. In the **Artifact Types** pane, select *[SAFe] Lightweight Business Case*:



2. In the **Artifact Attributes** pane, Select *Owner* to move it down just above *Status* using the down arrow:



3. The resulting set of attributes should look like this:



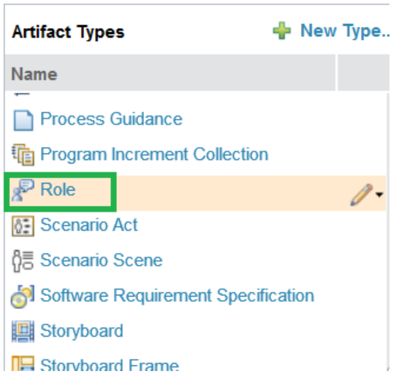
Artifact Attributes — Remove Attribute... — Add Attribute...

Name	Data Type	Description
Outsourced Development	Boolean	Indicates recommendation for outsourcing development of Epic.
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.

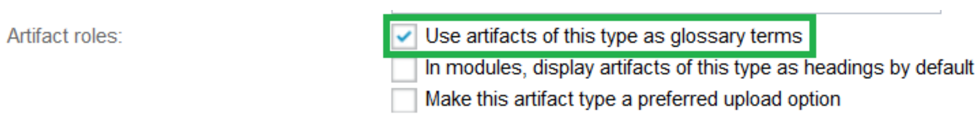
4. Click **Save** to save your changes.

Role

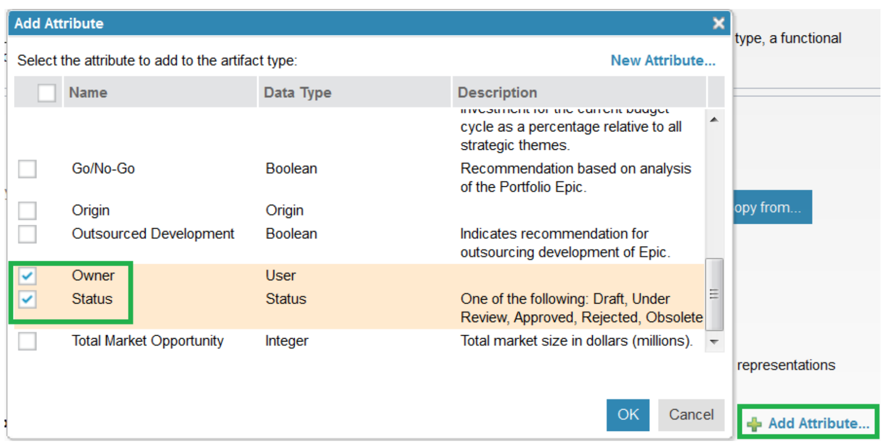
1. In the **Artifact Types** pane, select *Role*:



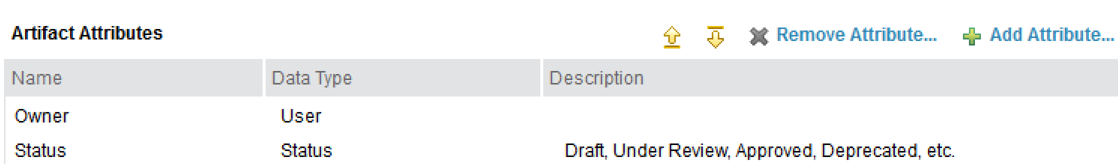
2. Ensure the **Use artifacts of this type as glossary terms** checkbox is selected in the **Artifact roles:** section:



3. In the **Artifact Attributes** pane, select + **Add Attribute…** and then click the checkbox next to *Owner* and *Status*:



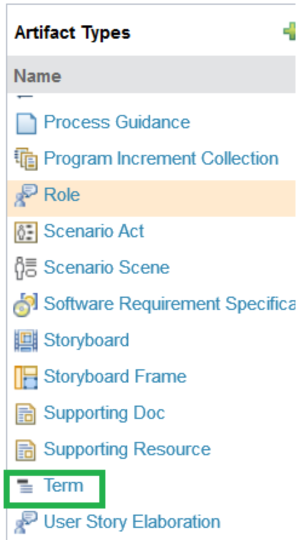
4. Click **OK.** The resulting set of attributes should look like this:



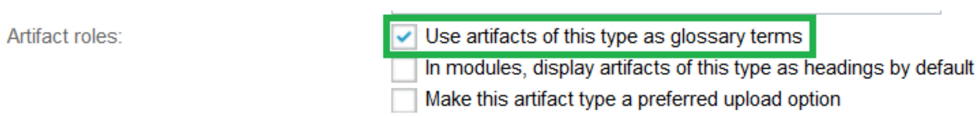
5. Click **Save** to save your changes.

Term

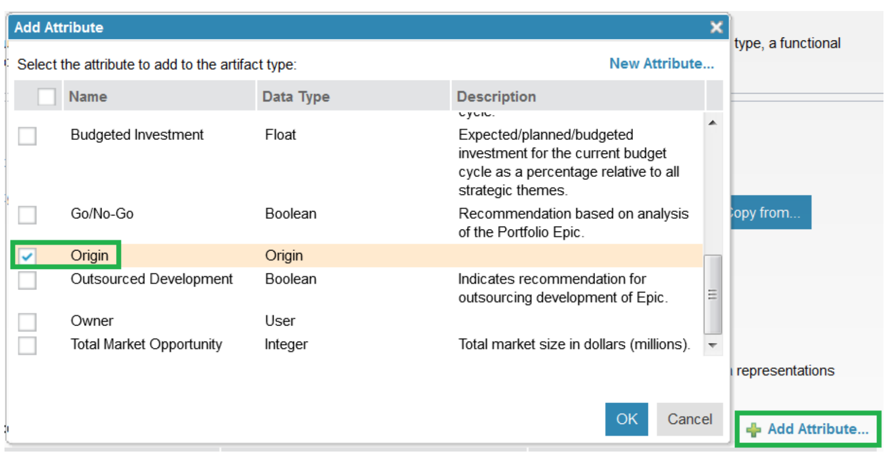
1. In the **Artifact Types** pane, select *Term*:



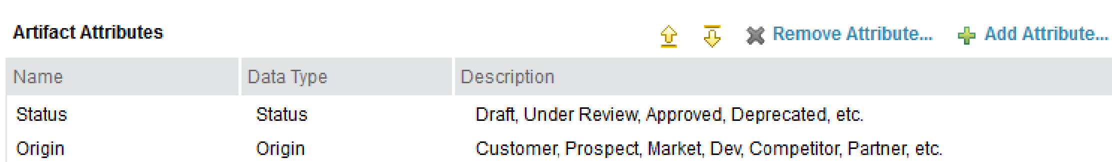
2. Ensure the **Use artifacts of this type as glossary terms** checkbox is selected in the **Artifact roles:** section:



3. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Origin*:



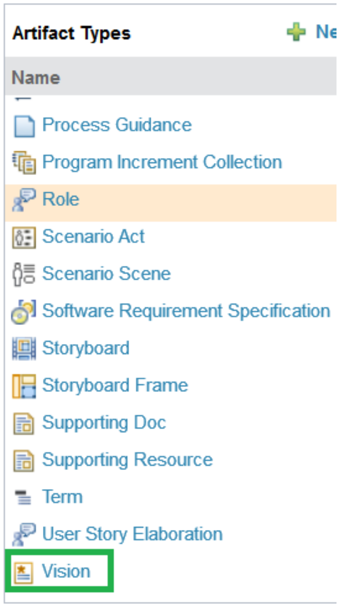
4. Click **OK.** The resulting set of attributes should look like this:



5. Click **Save** to save your changes.

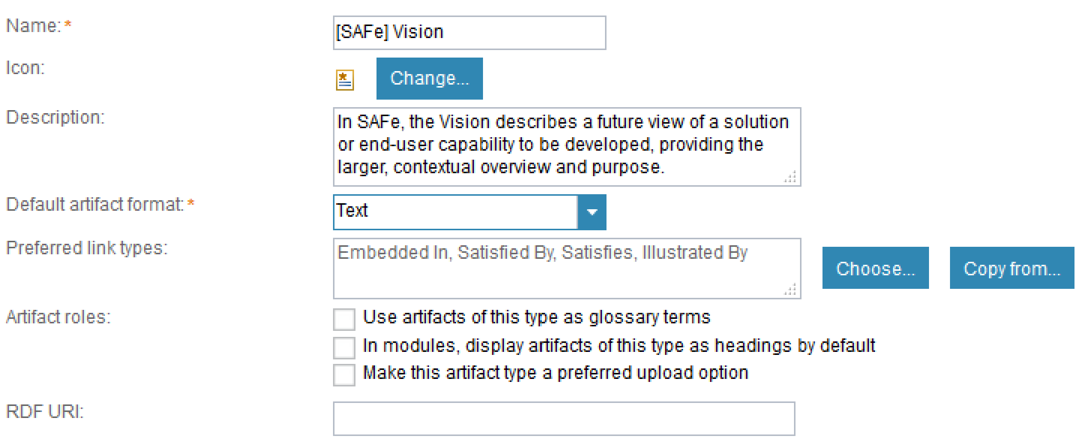
VISION

1. In the **Artifact Types** pane, select *Vision*:

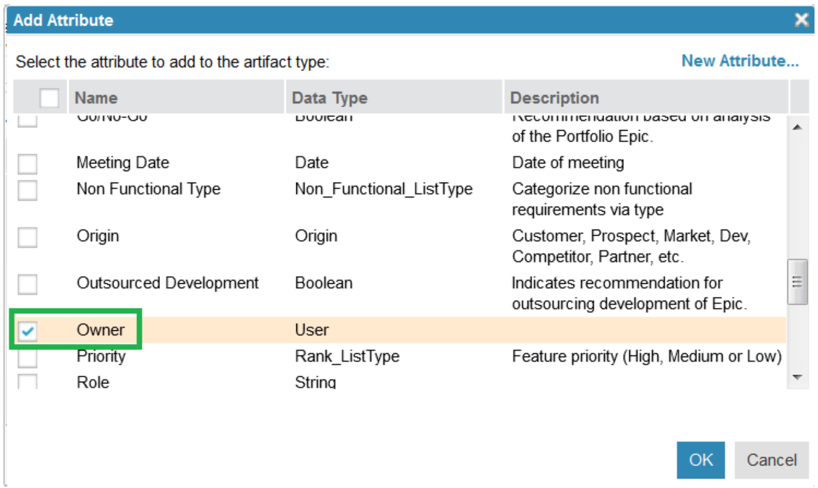


2. Change these details:

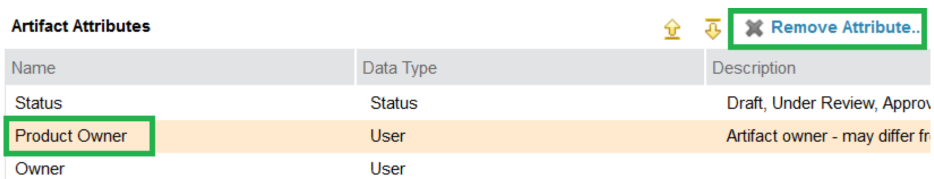
   Name: `[SAFe] Vision`
   Description: `In SAFe, the Vision describes a future view of a solution or end-user capability to be developed, providing the larger, contextual overview and purpose.`
   Preferred link types: `Satisfies, Satisfied By, Embedded In, Illustrated By`
3. Your updated *Vision* looks like this:



4. In the **Artifact Attributes** pane, select + **Add Attribute…** and then click the checkbox next to *Owner*:



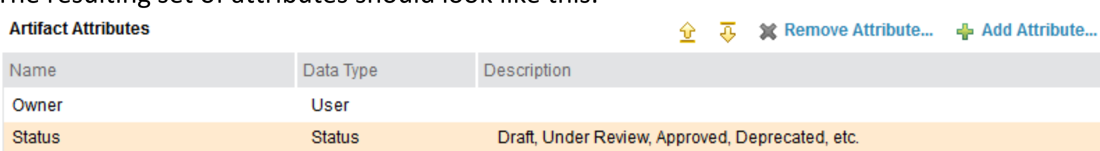
5. Click **OK,** then select the *Product Owner* attribute and click **X Remove Attribute…:**



6. Click **Yes** to confirm the deletion.

7. In the **Artifact Attributes** pane, Select *Status* to move it down just below *Owner* using the down arrow.

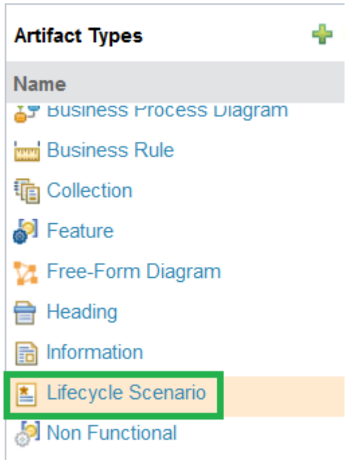
8. The resulting set of attributes should look like this:



9. Click **Save** to save your changes.

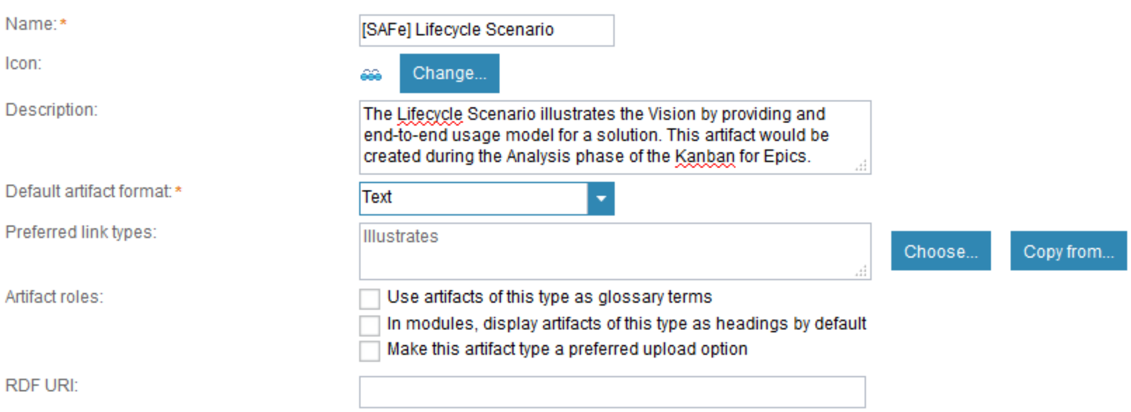
Lifecycle Scenario

1. In the **Artifact Types** pane, select *Lifecycle Scenario*:

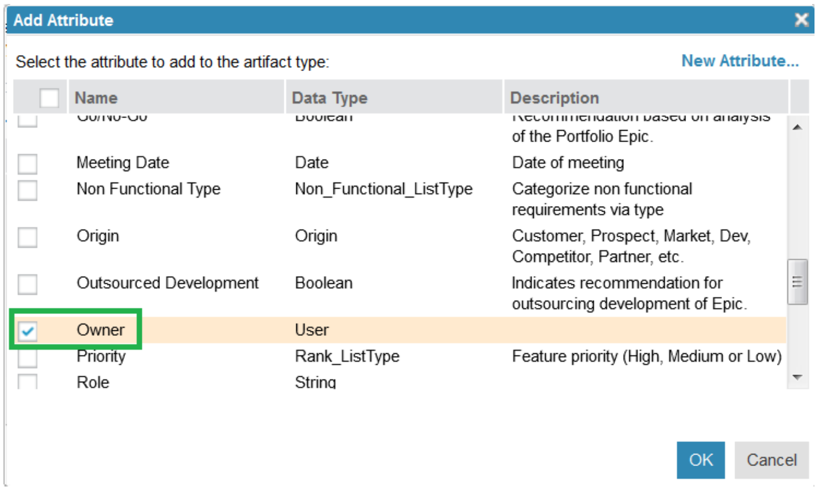


2. Change these details:

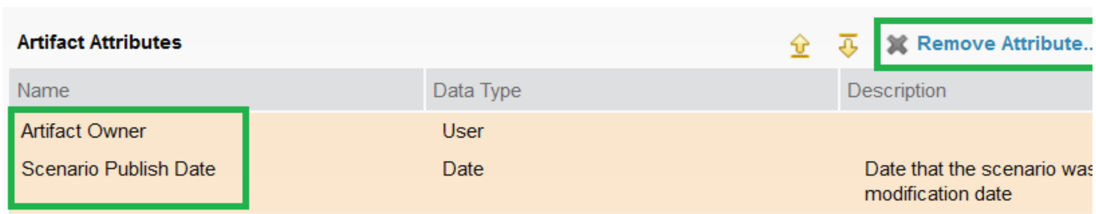
   Name: `[SAFe] Lifecycle Scenario`
   Icon: Scenario
   Description: `The Lifecycle Scenario illustrates the Vision by providing and end-to-end usage model for a solution. This artifact would be created during the Analysis phase of the Kanban for Epics.`
   Default artifact format: Text
   Preferred link types: `Illustrates`
3. Your updated *Lifecycle Scenario* looks like this:



4. In the **Artifact Attributes** pane, select **+ Add Attribute...** and then click the checkbox next to *Owner*:



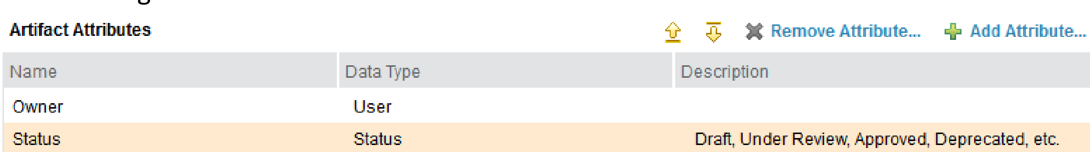
5. Click **OK,** then select the *Artifact Owner* and *Scenario Publish Date* attributes and click **X Remove Attribute…:**



6. Click **Yes** to confirm the deletion.

7. In the **Artifact Attributes** pane, Select *Status* to move it down just below *Owner* using the down arrow.

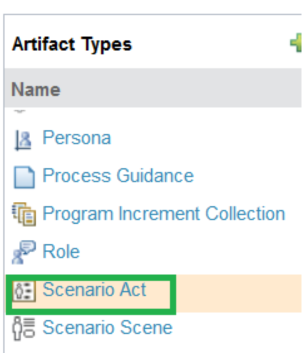
8. The resulting set of attributes should look like this:



9. Click **Save** to save your changes.

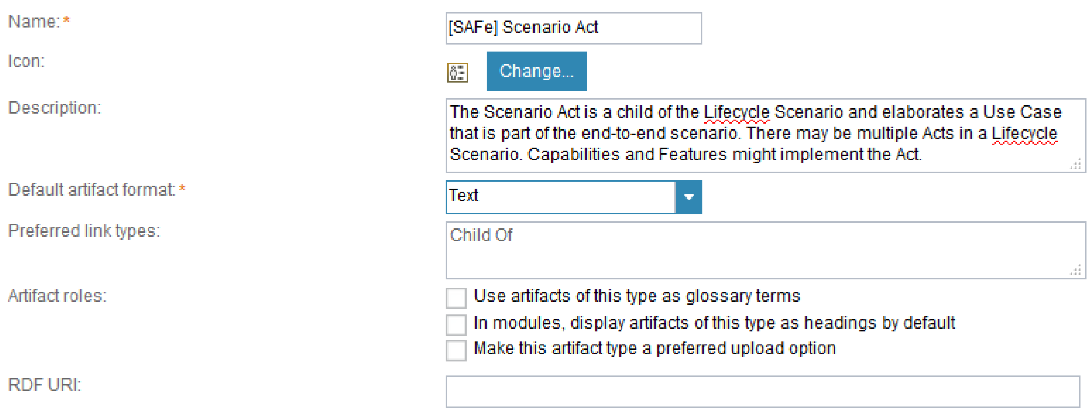
Scenario Act

1. In the **Artifact Types** pane, select *Scenario Act*:

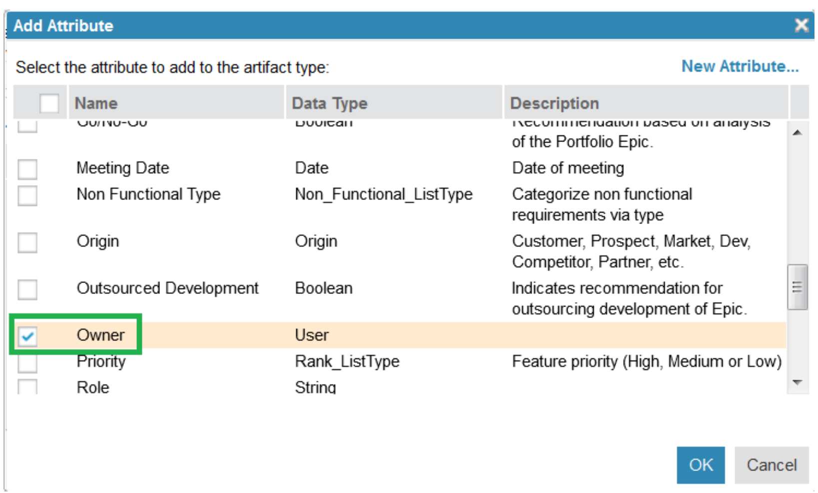


2. Change these details:

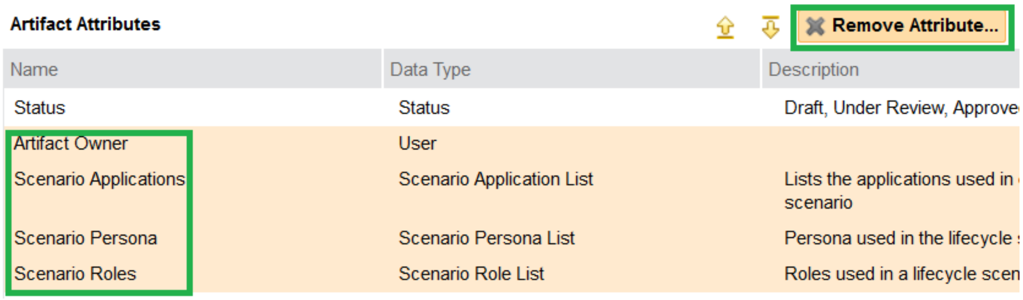
   Name: `[SAFe] Scenario Act`
   Description: `The Scenario Act is a child of the Lifecycle Scenario and elaborates a Use Case that is part of the end-to-end scenario. There may be multiple Acts in a Lifecycle Scenario. Capabilities and Features might implement the Act.`
   Preferred link types: `Child of`
3. Your updated *Scenario Act* looks like this:



4. In the **Artifact Attributes** pane, select **+ Add Attribute…** and then click the checkbox next to *Owner*:

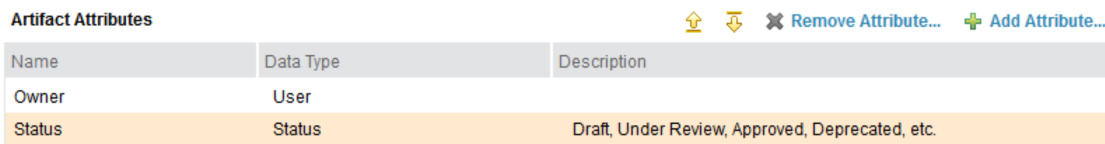


5. Click **OK,** then select the *Artifact Owner, Scenario Applications, Scenario Persona* and *Scenario Roles* attributes and click **X Remove Attribute…:**



This information will be part of the Scenario Act template.

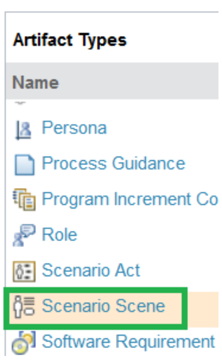
6. Click **Yes** to confirm the deletion.
7. In the **Artifact Attributes** pane, Select *Status* to move it down just below *Owner* using the down arrow.
8. The resulting set of attributes should look like this:



9. Click **Save** to save your changes.

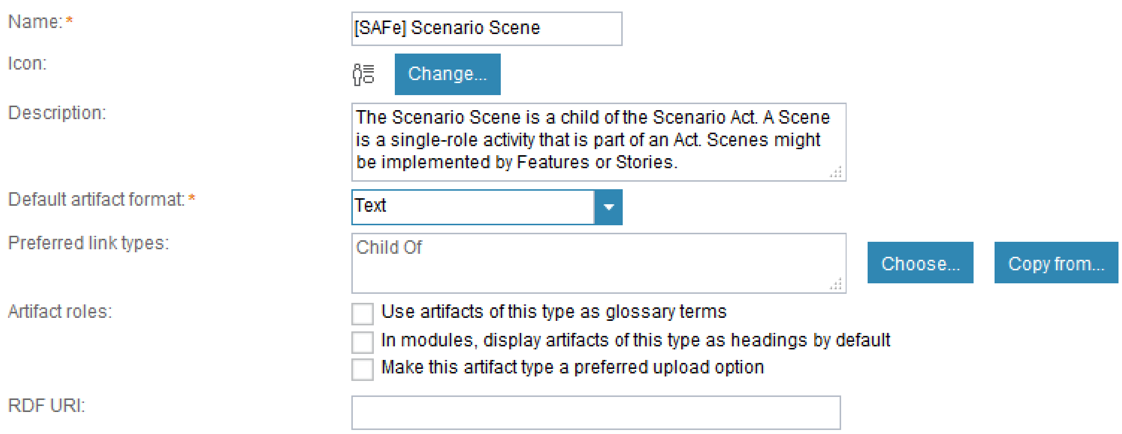
Scenario Scene

1. In the **Artifact Types** pane, select *Scenario Scene*:

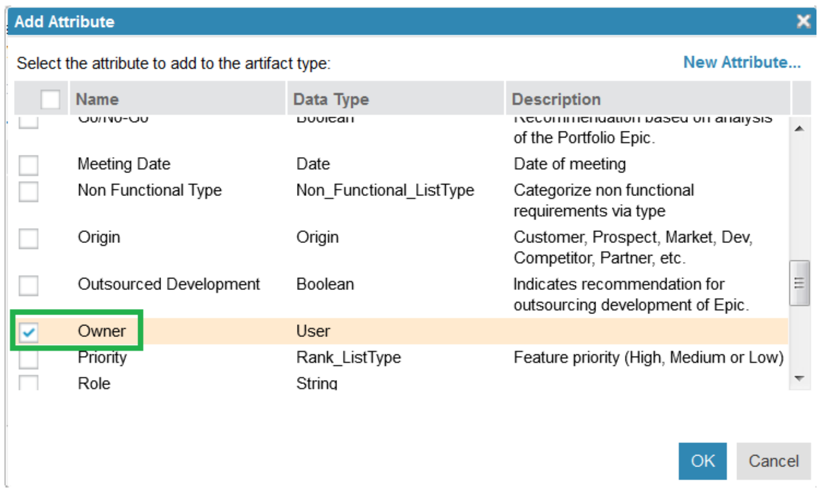


2. Change these details:

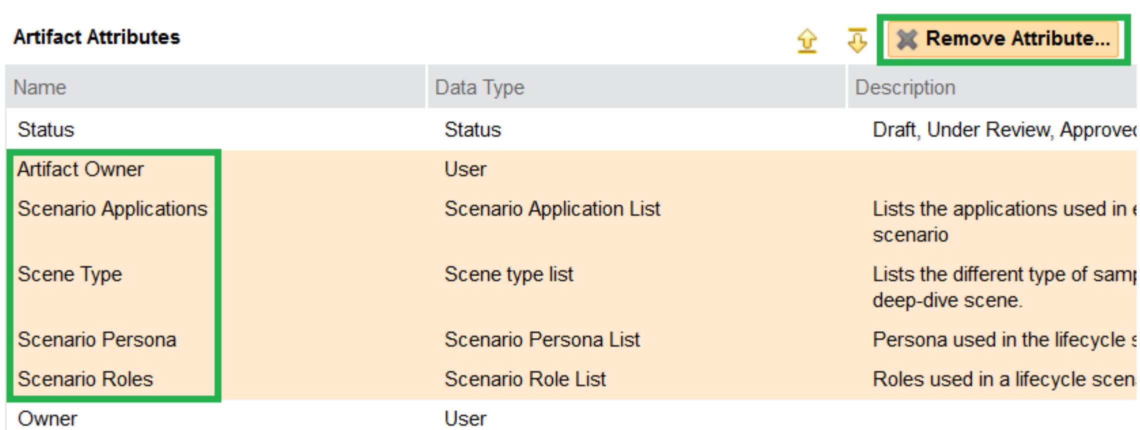
   Name: `[SAFe] Scenario Scene`
   Description: `The Scenario Scene is a child of the Scenario Act. A Scene is a single-role activity that is part of an Act. Scenes might be implemented by Features or Stories.`
   Preferred link types: `Child of`
3. Your updated *Scenario Scene* looks like this:



4. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Owner*:



5. Click **OK,** then select the *Artifact Owner, Scenario Applications, Scene Type, Scenario Persona* and *Scenario Roles* attributes and click **X Remove Attribute...:**



This information will be part of the Scenario Scene template.

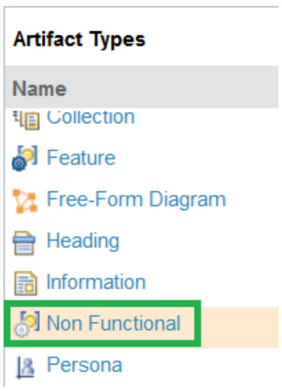
6. Click **Yes** to confirm the deletion.

7. In the **Artifact Attributes** pane, Select *Status* to move it down just below *Owner* using the down arrow.
8. The resulting set of attributes should look like this:

9. Click **Save** to save your changes.

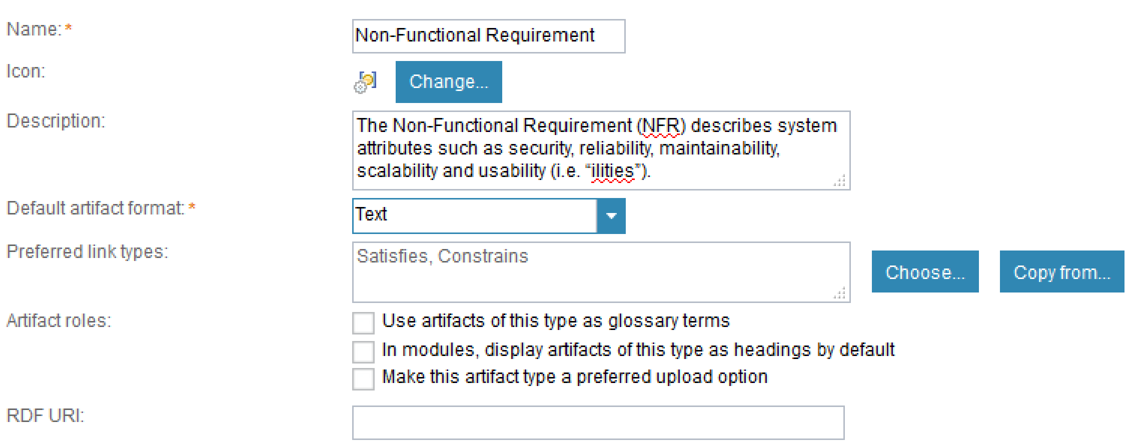
Non-Functional Requirement

1. In the **Artifact Types** pane, select *Non Functional*:

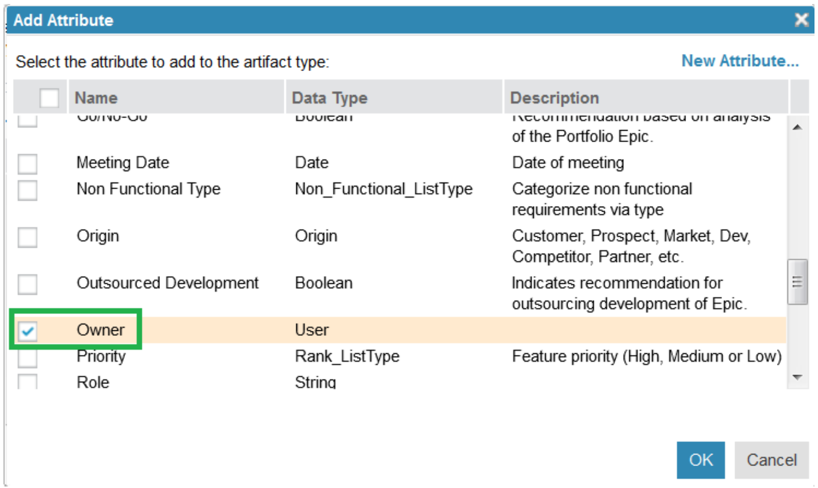


2. Change these details:

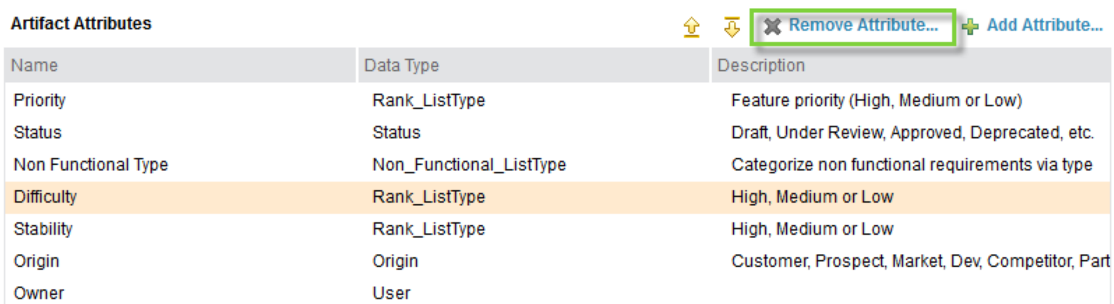
   Name: `Non-Functional Requirement`
   Description: `The Non-Functional Requirement (NFR) describes system attributes such as security, reliability, maintainability, scalability and usability (i.e. "ilities").`
   Preferred link types: `Satisfies, Constrains`
3. Your updated *Non-Functional Requirement* looks like this:



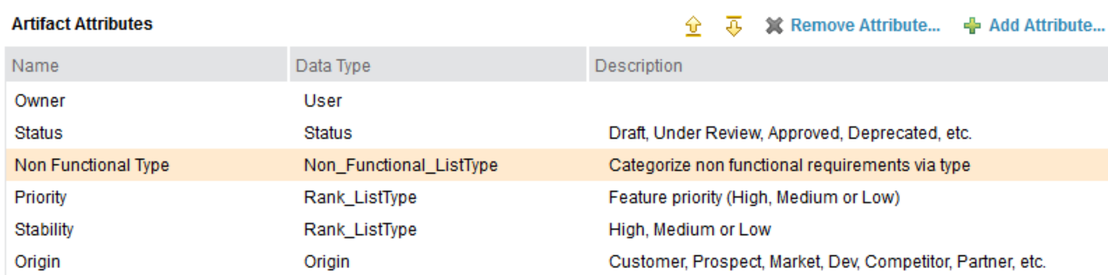
4. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Owner*:



5. Click **OK,** then select the *Difficulty* and click **X Remove Attribute…:**



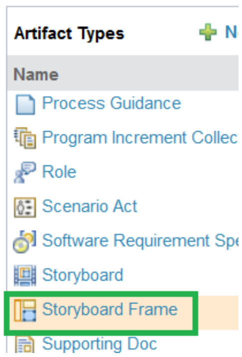
6. Click **Yes** to confirm the deletion.
7. Use the up and down arrows to order the attributes as indicated below:



8. Click **Save** to save your changes.

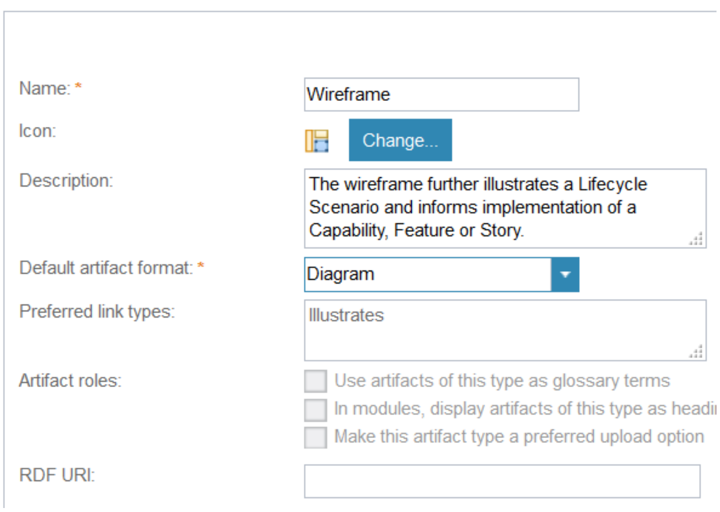
WIREFRAME

1. In the **Artifact Types** pane, select *Storyboard Frame*:

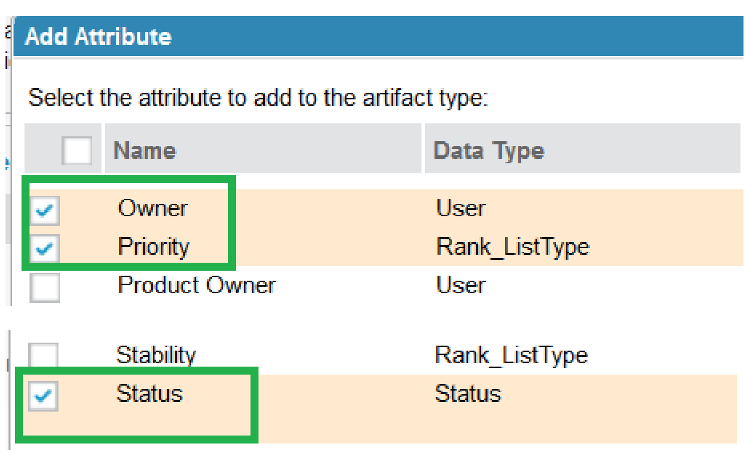


2. Change these details:

   Name: `Wireframe`
   Description: `The wireframe further illustrates a Lifecycle Scenario and informs implementation of a Capability, Feature or Story.`
   Preferred link types: `Illustrates`
3. Your updated *Wireframe* looks like this:



4. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Owner*, *Priority*, and *Status*:

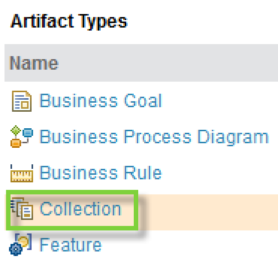


5. Use the up and down arrows to order the attributes as indicated below:

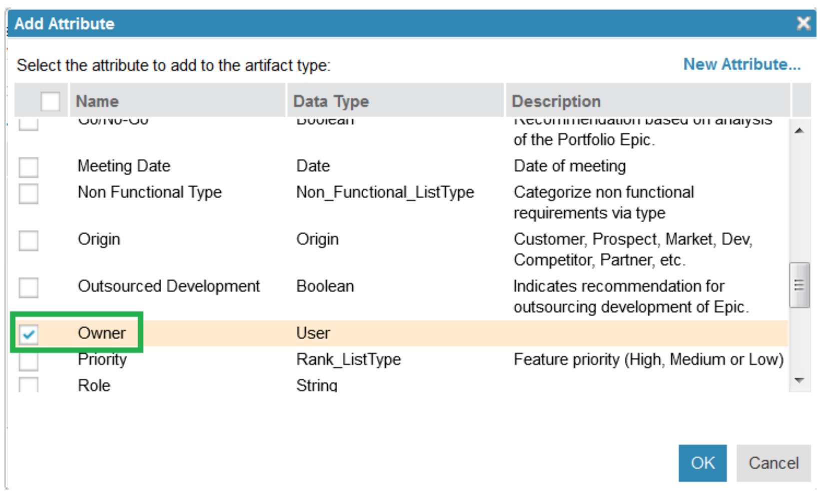
6. Click **Save** to save your changes.

COLLECTION

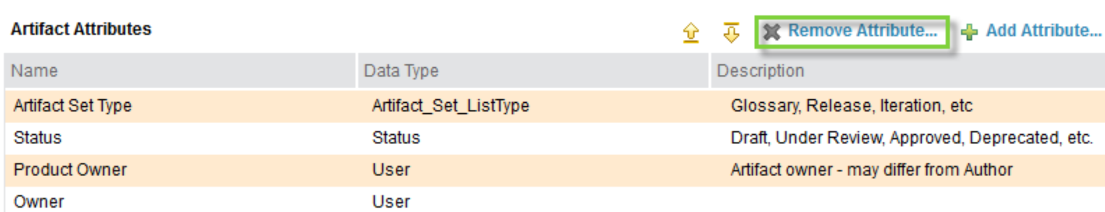
1. In the **Artifact Types** pane, select *Collection*:



2. In the **Artifact Attributes** pane, select **+ Add Attribute...** and then click the checkbox next to *Owner*:



3. Click **OK,** then select the *Artifact Set Type* and *Product Owner* attributes and click **X Remove Attribute...:**



4. Click **Yes** to confirm the deletions.
5. Use the up and down arrows to order the attributes as indicated below:

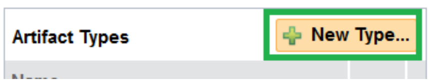
6. Click **Save** to save your changes.

CREATE NEW ARTIFACT TYPES

In this section, you will create new artifact types required for support of SAFe V4.0.

PROGRAM

1. In the **Artifact Types** box, click + **New Type...** to create a new *Program* artifact type.



2. Specify these details:

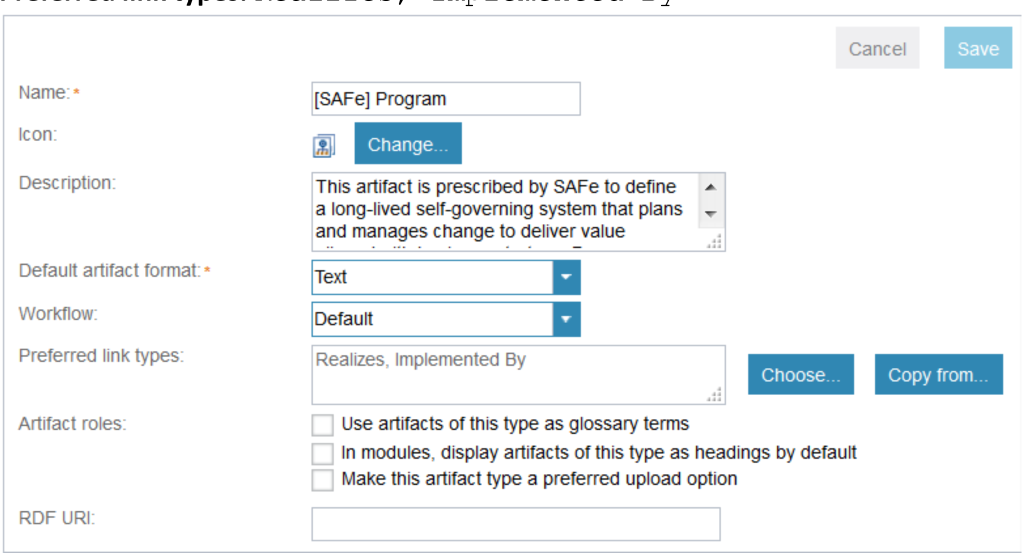
   Name: `[SAFe] Program`

   Icon: System Requirement Module

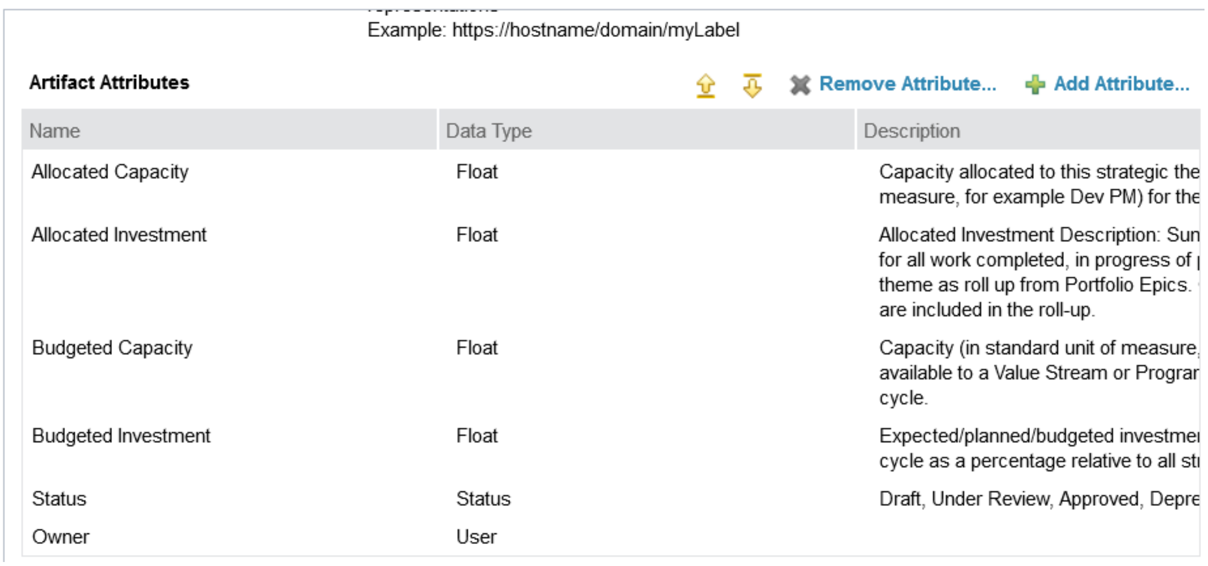
   Description: `This artifact is prescribed by SAFe to define a long-lived self-governing system that plans and manages change to deliver value aligned with business strategy. Programs (Agile Release Trains) realize Value Streams. They are where development teams and other resources are applied to important ongoing work efforts.`

   Default artifact format: `Text`

   Preferred link types: `Realizes, Implemented By`



3. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Allocated Capacity, Allocated Investment, Budgeted Capacity, Budgeted Investment, Owner* and *Status*.
4. Click **OK.** The resulting set of attributes should look like this:


Example: https://hostname/domain/myLabel

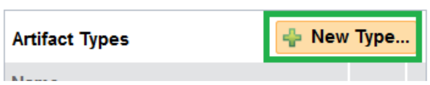
Artifact Attributes Remove Attribute... Add Attribute...

Name	Data Type	Description
Allocated Capacity	Float	Capacity allocated to this strategic the measure, for example Dev PM) for the
Allocated Investment	Float	Allocated Investment Description: Sun for all work completed, in progress of theme as roll up from Portfolio Epics. are included in the roll-up.
Budgeted Capacity	Float	Capacity (in standard unit of measure, available to a Value Stream or Prograr cycle.
Budgeted Investment	Float	Expected/planned/budgeted investme cycle as a percentage relative to all st
Status	Status	Draft, Under Review, Approved, Depre
Owner	User	

5. Click **Save** to save your changes.

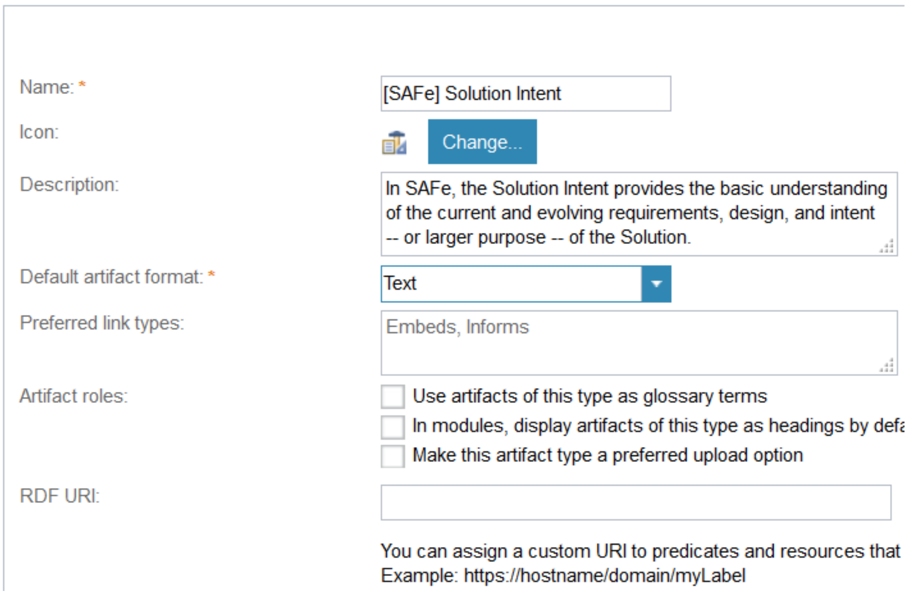
Solution Intent

1. In the **Artifact Types** box, click + **New Type…** to create a new *Solution Intent* artifact type.

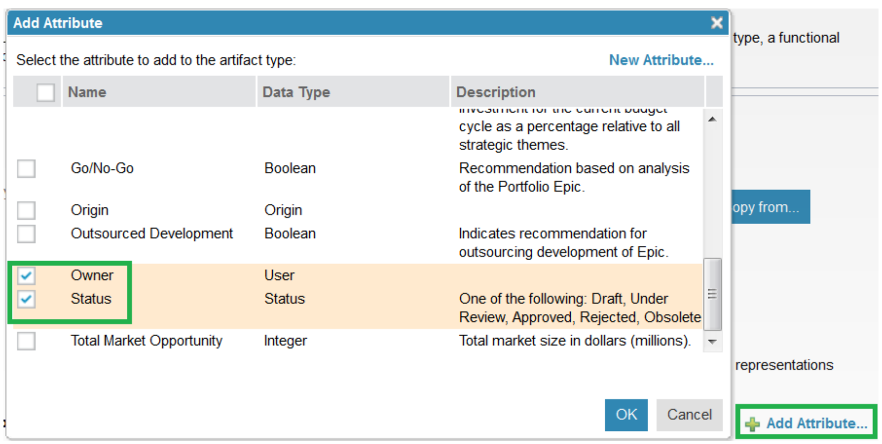


2. Specify these details:

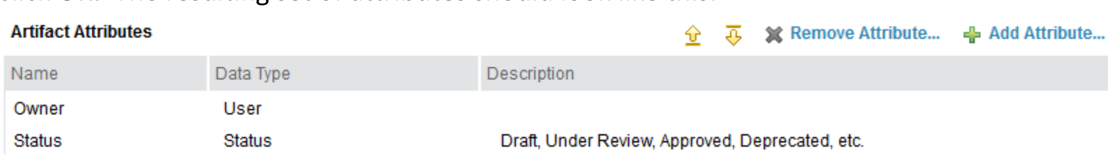
Name: `[SAFe] Solution Intent`
Icon: Design Requirement
Description: `In SAFe, the Solution Intent provides the basic understanding of the current and evolving requirements, design, and intent -- or larger purpose -- of the Solution.`
Default artifact format: `Text`
Preferred link types: `Embeds, Informs`



3. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Owner* and *Status*:



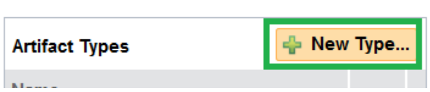
4. Click **OK.** The resulting set of attributes should look like this:



5. Click **Save** to save your changes.

Solution Context

1. In the **Artifact** Types box, click + **New Type...** to create a new *Solution Context* artifact type.



2. Specify these details:

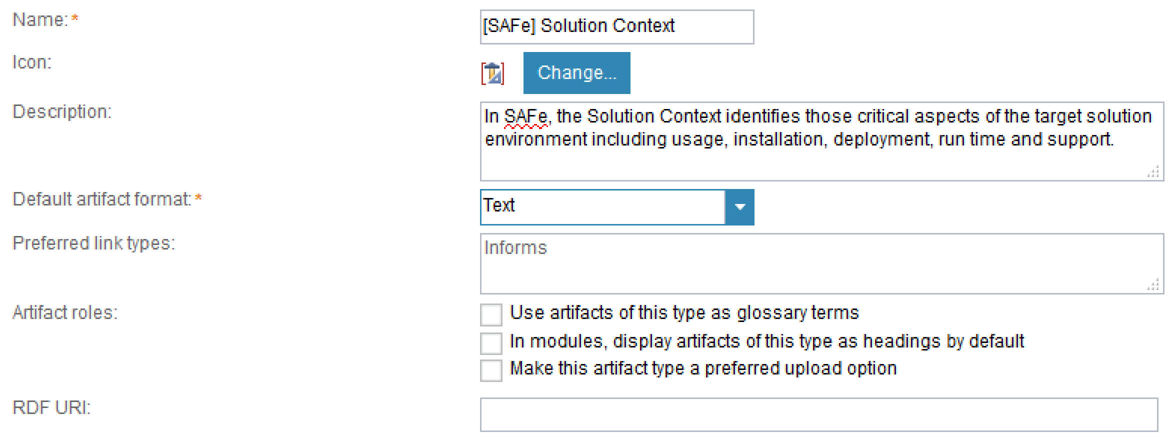
Name: `[SAFe] Solution Context`

Icon: Design Constraints

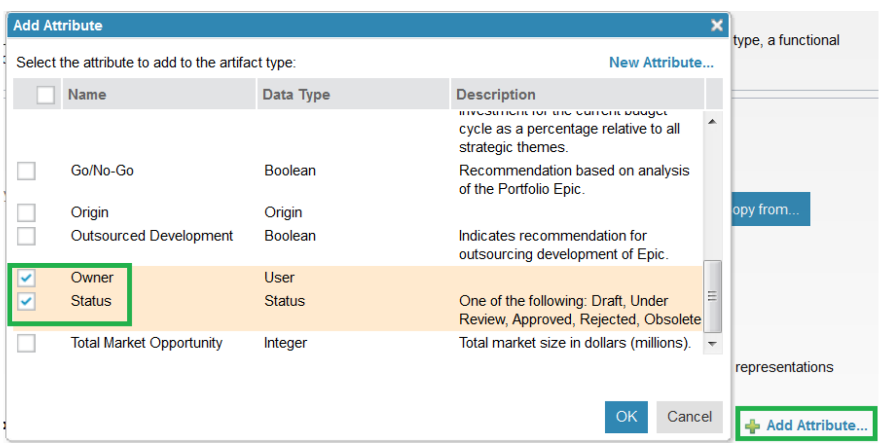
Description: `In SAFe, the Solution Context identifies those critical aspects of the target solution environment including usage, installation, deployment, run time and support.`

Default artifact format: `Text`

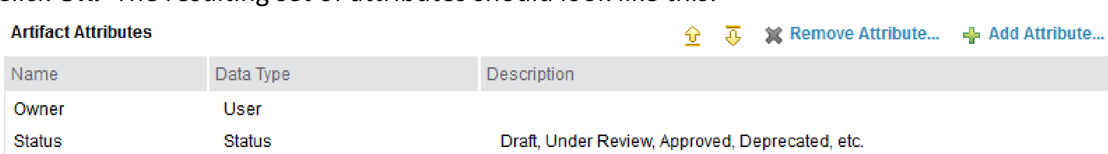
Preferred link types: `Informs`



3. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Owner* and *Status*:



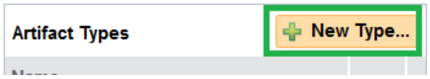
4. Click **OK.** The resulting set of attributes should look like this:



5. Click **Save** to save your changes.

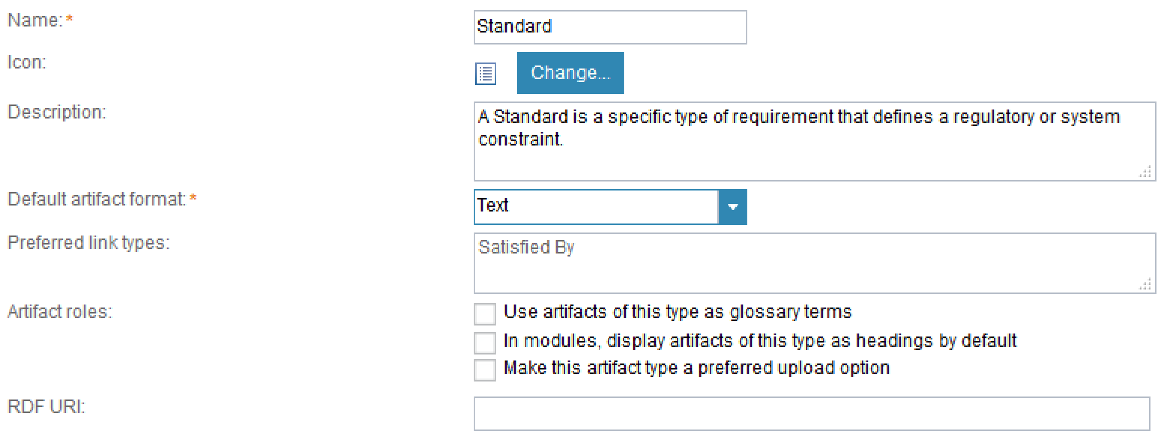
STANDARD

1. In the **Artifact** Types box, click + **New Type...** to create a new *Standard* artifact type.

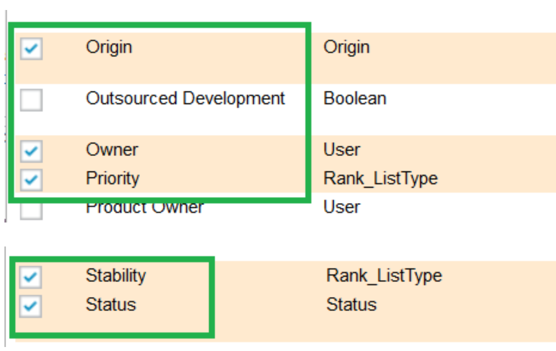


2. Specify these details:

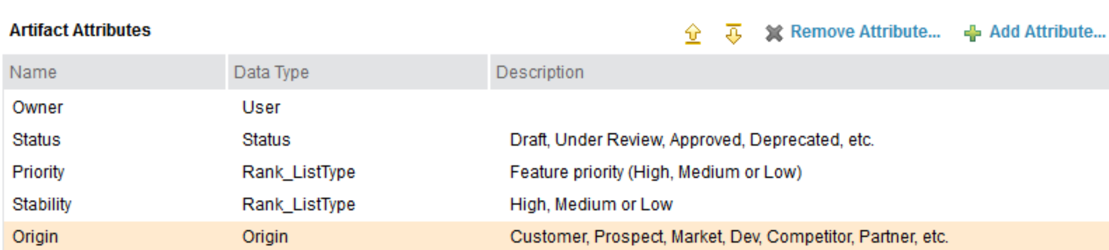
   Name: `Standard`
   Icon: Specifications
   Description: `A Standard is a specific type of requirement that defines a regulatory or system constraint.`
   Default artifact format: `Text`
   Preferred link types: `Satisfied By`



3. In the **Artifact Attributes** pane, select + **Add Attribute...** and then click the checkbox next to *Origin, Owner, Priority, Stability* and *Status*:



4. Use the up and down arrows to order the attributes as indicated below:

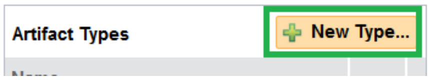


Name	Data Type	Description
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.
Priority	Rank_ListType	Feature priority (High, Medium or Low)
Stability	Rank_ListType	High, Medium or Low
Origin	Origin	Customer, Prospect, Market, Dev, Competitor, Partner, etc.

5. Click **Save** to save your changes.

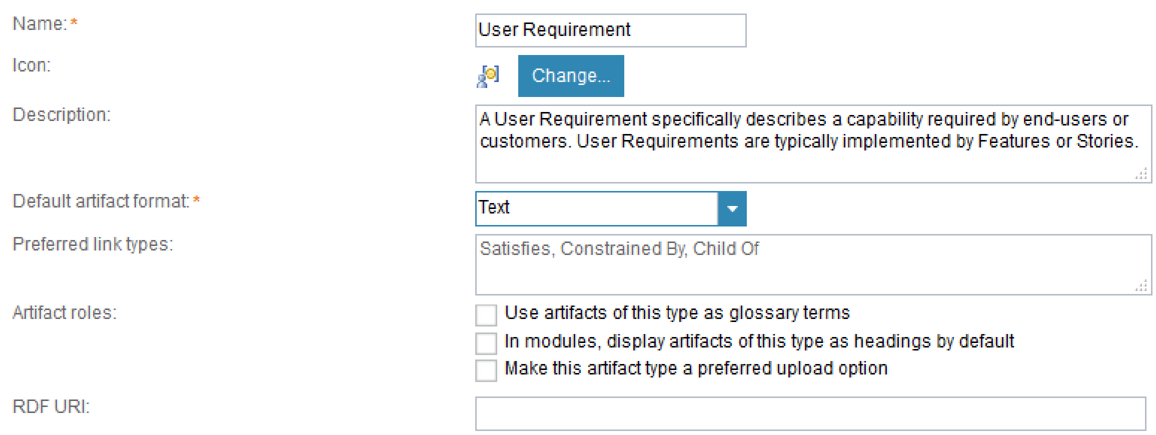
User Requirement

1. In the **Artifact** Types box, click **+ New Type…** to create a new *User Requirement* artifact type.

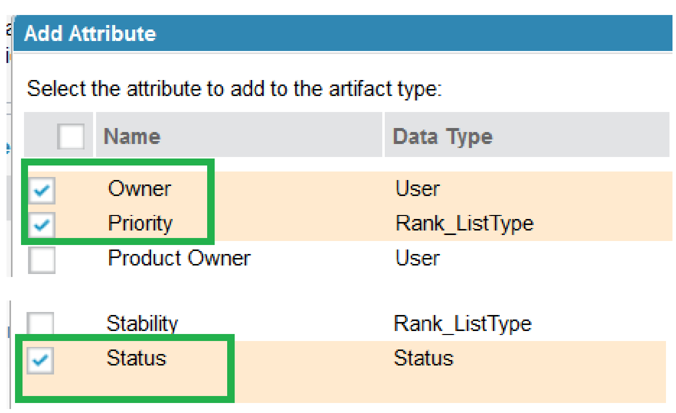


2. Specify these details:

   Name: `User Requirement`
   Icon: User Requirement
   Description: `A User Requirement specifically describes a capability required by end-users or customers. User Requirements are typically implemented by Features or Stories.`
   Default artifact format: `Text`
   Preferred link types: `Constrained By, Child Of, Satisfies`



3. In the **Artifact Attributes** pane, select **+ Add Attribute…** and then click the checkbox next to *Owner*, *Priority*, and *Status*:



4. Use the up and down arrows to order the attributes as indicated below:

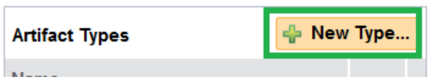
Artifact Attributes ⇧ ⇩ ✖ Remove Attribute... ✚ Add Attribute...

Name	Data Type	Description
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.
Priority	Rank_ListType	Feature priority (High, Medium or Low)

5. Click **Save** to save your changes.

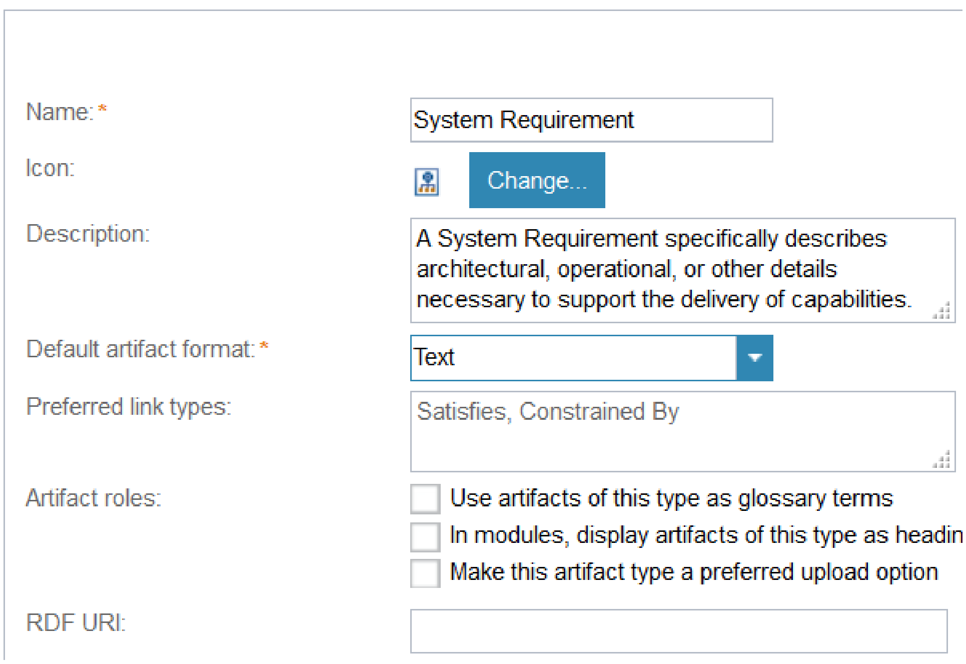
SYSTEM REQUIREMENT

1. In the **Artifact** Types box, click **+ New Type…** to create a new *System Requirement* artifact type.

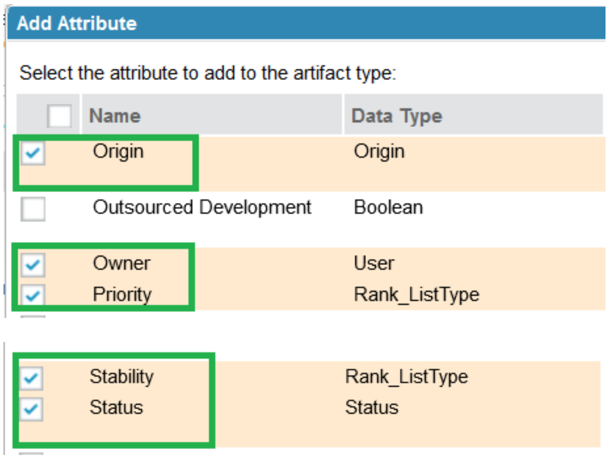


2. Specify these details:

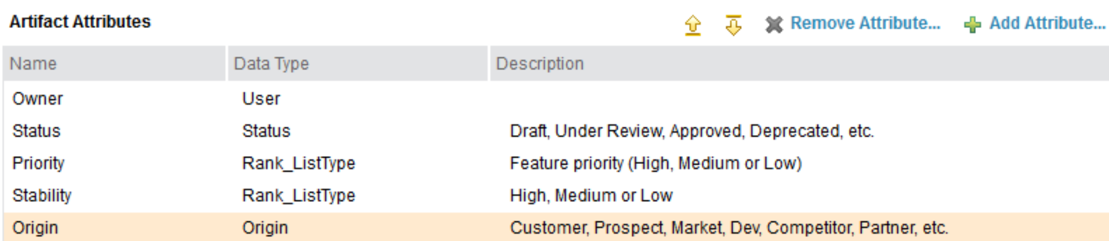
Name: `System Requirement`
Icon: System Requirement
Description: `A System Requirement specifically describes architectural, operational, or other details necessary to support the delivery of capabilities.`
Default artifact format: `Text`
Preferred link types: `Constrained By, Satisfies`



3. In the **Artifact Attributes** pane, select **+ Add Attribute…** and then click the checkbox next to *Owner*, *Priority*, *Status, Stability,* and *Origin*:



4. Use the up and down arrows to order the attributes as indicated below:



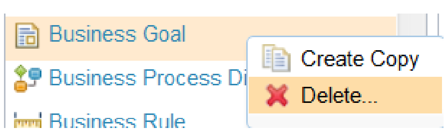
Name	Data Type	Description
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.
Priority	Rank_ListType	Feature priority (High, Medium or Low)
Stability	Rank_ListType	High, Medium or Low
Origin	Origin	Customer, Prospect, Market, Dev, Competitor, Partner, etc.

5. Click **Save** to save your changes.

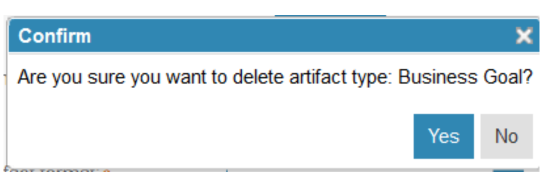
CLEAN UP

This section is optional. If you would prefer to have a "clean" SAFe V4.0 requirements project template, you can follow these steps to remove the extraneous artifact types and tags.

1. In the **Artifact Types** box, select *Business Goal,* right-click and then select **X Delete** in the context menu:



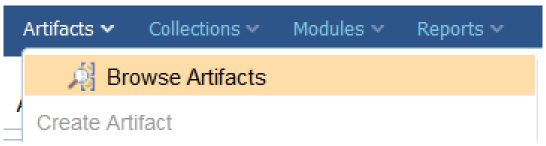
2. Select **Yes** to confirm the deletion:



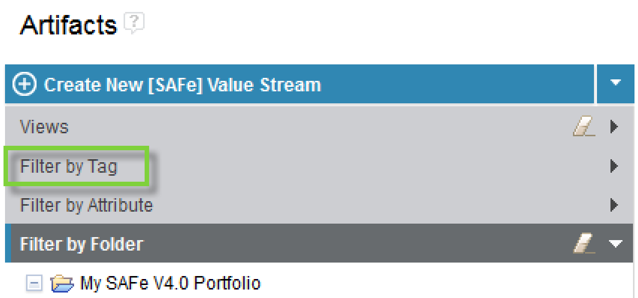
3. Repeat steps 1-2 to remove the following artifact types:
   - *Business Process Diagram*
   - *Business Rule*
   - *Feature*
   - *Information*
   - *Persona*

- *Process Guidance*
- *Program Increment Collection*
- *Software Requirement Specification*
- *Storyboard*
- *Supporting Doc*
- *User Story Elaboration*

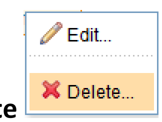
4. Click **Artifacts > Browse Artifacts** option from the menu bar:



5. Click on the **Filter by Tag** option:

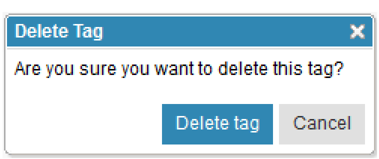


6. Remove the following shared tags by right-clicking each one and selecting **X Delete**



   - *analytics*
   - *competitive_advantage*
   - *mainframe*
   - *reporting*

7. Confirm the deletion of each tag:



CREATE ARTIFACT TEMPLATES

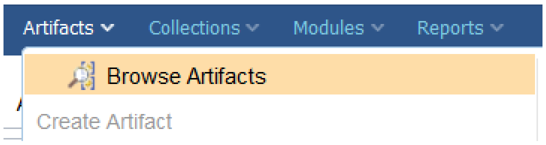
In this section, you create new artifact templates for:

- Value Stream
- Vision
- Solution Intent
- Solution Context
- Lifecycle Scenario
- Scenario Act
- Scenario Scene

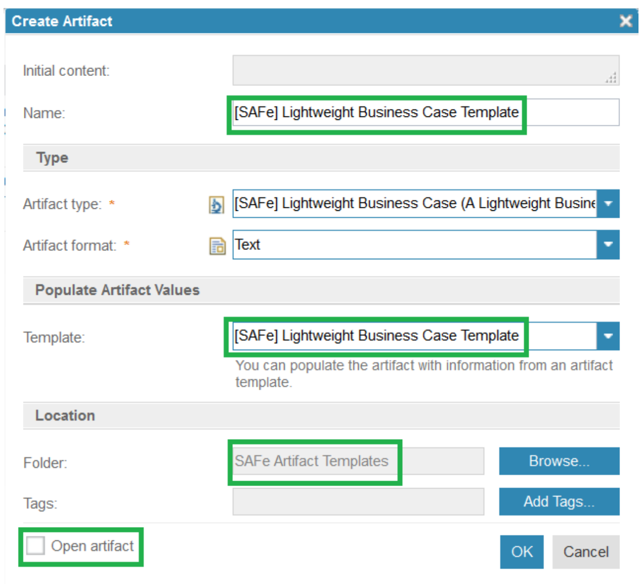
Before creating these new templates, create the [SAFe] template artifacts for *Strategic Theme* and *Lightweight Business* Case that already exist in our project area and store them in the new **SAFe Artifact Templates** folder.

LIGHTWEIGHT BUSINESS CASE

1. Click **Artifacts > Browse Artifacts** option from the menu bar:



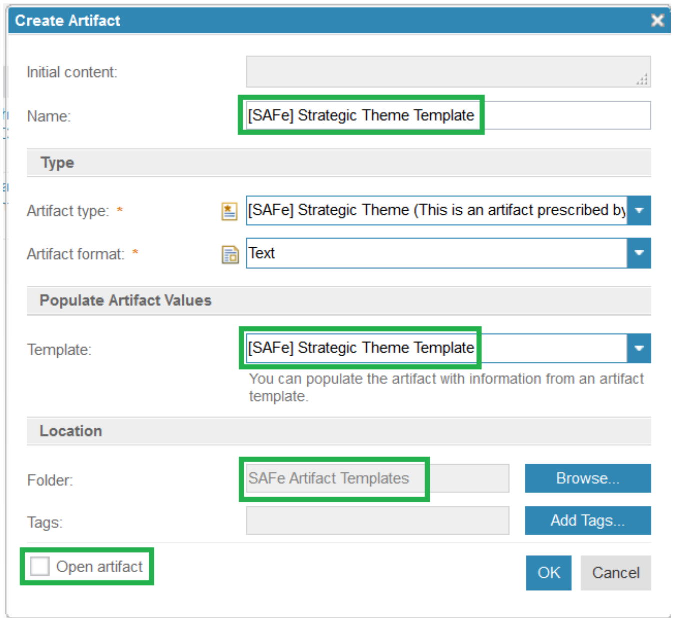
2. Create a new *[SAFe] Lightweight Business Case* template based on the template, specifying the following details:
Name: `[SAFe] Lightweight Business Case Template`
Template: `[SAFe] Lightweight Business Case Template`
Folder: `SAFe Artifact Templates`
Open artifact: `<unchecked>`



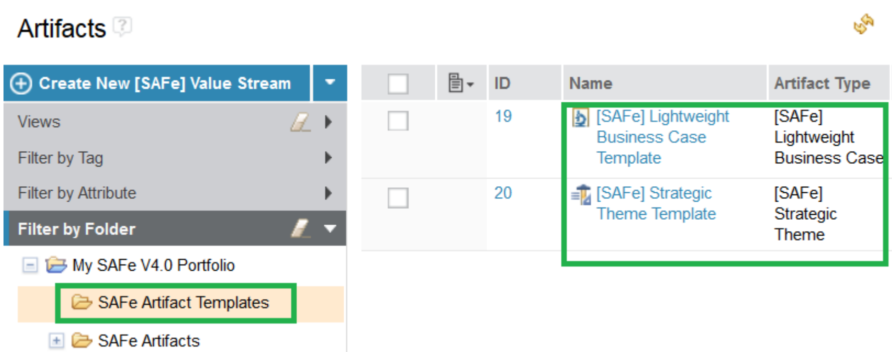
3. Click **OK**.

STRATEGIC THEME

4. Repeat the procedure used to create the Lightweight Business Case to create a new *[SAFe] Strategic Theme* template based on the template, specifying the following details:
Name: `[SAFe] Strategic Theme Template`
Template: `[SAFe] Strategic Theme Template`
Folder: `SAFe Artifact Templates`
Open artifact: `<unchecked>`

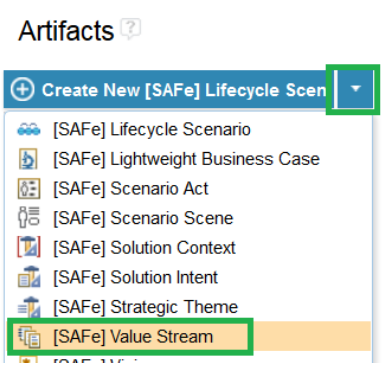


5. Click **OK**.
6. Select the **SAFe Artifact Templates** folder. The contents should look like this:

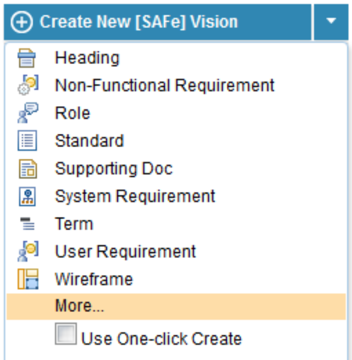


VALUE STREAM TEMPLATE

1. Select the drop-down arrow to create a new *[SAFe] Value Stream* artifact:

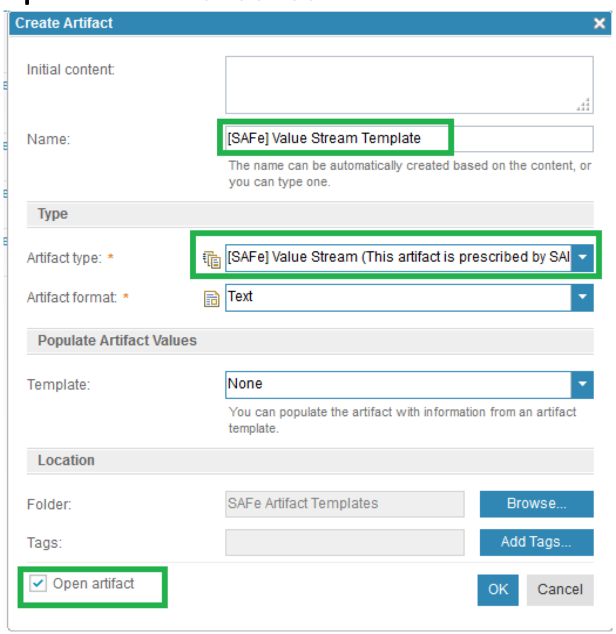


Note: If you do not see the artifact type in the list, you need to click **More...** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

   Name: `[SAFe] Value Stream Template`
   Template: `None`
   Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Value Stream Title]

Summary

<Describe the Value Stream in terms of the capabilities and value to the business and to customers.

Example: Provides customers with a fast, consistent banking experience online or via mobile devices. <remove>

Customer(s)

<Describe the customers that use capabilities provided by this Value Stream.>

Example: Personal banking customers, small business owners. <remove>

Triggers

<Describe the customer activities that trigger usage of the capabilities delivered by this Value Stream.>

Example: Open a new bank account, transfer money, check balances, check recent activity, bill pay, budget management, initiate loans, plan for retirement. <remove>

Inputs

<Describe the inputs involved in the trigger activities.>

Example: New bank account (with customer information), logon to existing accounts (with customer information), new loan. <remove>

Outputs

<Describe the outputs involved in the trigger activities.>

Example: Account opened, money transferred or deposited, bills paid. <remove>

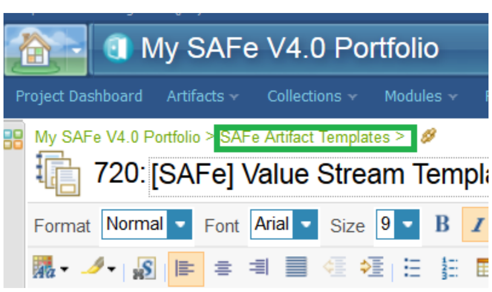
Includes

<Describe the products, subsystems, applications or components that are included in this Value Stream.>

Example: Bank Account Management, Retirement Planning, Loan Management.<remove>

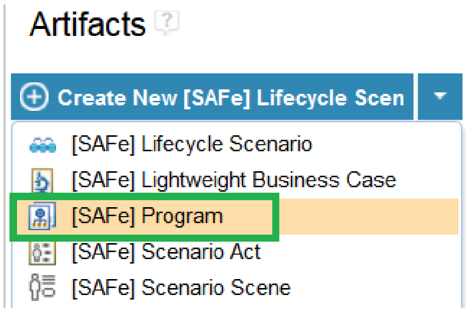
4. Click **Done**:

5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:

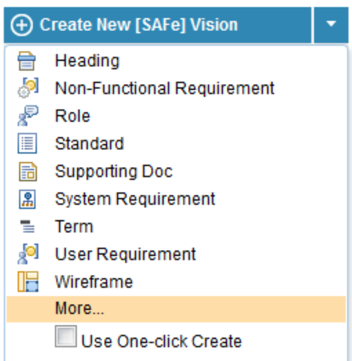


PROGRAM TEMPLATE

1. Select the drop-down arrow to create a new *[SAFe] Program* artifact:

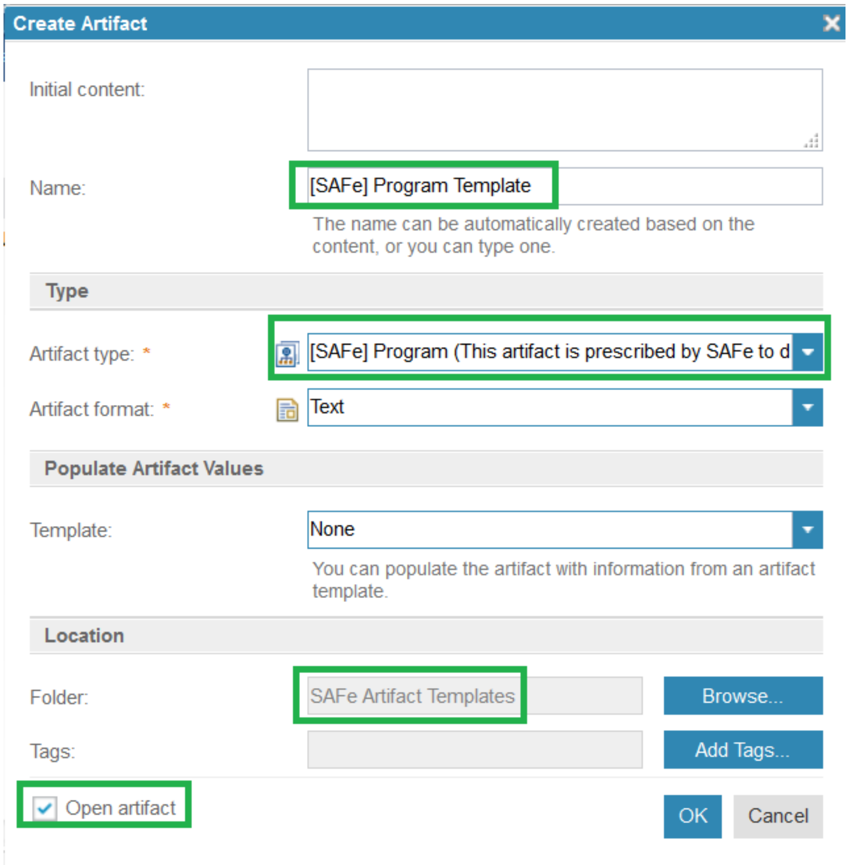


Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Program Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Program Title]

Summary

<Describe the Program in terms of the capabilities and value to the business and to customers.

Example: Provides customers with a fast, consistent banking experience online or via mobile devices. <remove>

Customer(s)

<Describe the customers that use capabilities provided by this Program.>

Example: Personal banking customers, small business owners. <remove>

Triggers

<Describe the customer activities that trigger usage of the capabilities delivered by this Program.>

Example: Open a new bank account, transfer money, check balances, check recent activity, bill pay, budget management, initiate loans, plan for retirement. <remove>

Inputs

<Describe the inputs involved in the trigger activities.>

Example: New bank account (with customer information), logon to existing accounts (with customer information), new loan. <remove>

Outputs

<Describe the outputs involved in the trigger activities.>

Example: Account opened, money transferred or deposited, bills paid. <remove>

Includes

<Describe the products, subsystems, applications or components that are included in this Program.>

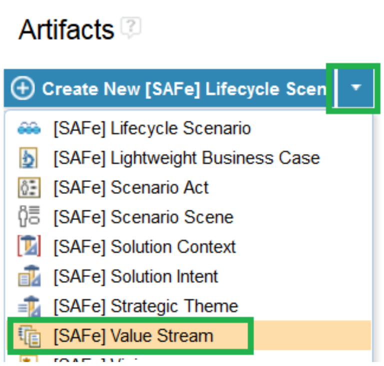
Example: Bank Account Management, Retirement Planning, Loan Management.<remove>

4. Click **Done**:

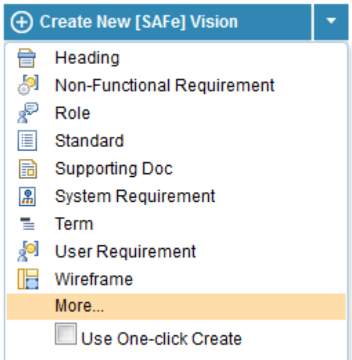
5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:

Vision Template

1. Select the drop-down arrow to create a new *[SAFe] Vision* artifact template:

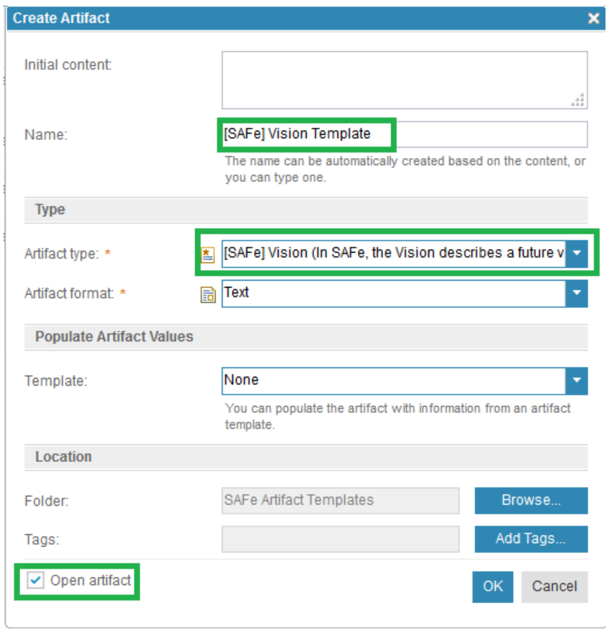


Note: If you do not see the artifact type in the list, you need to click **More...** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

   Name: `[SAFe] Vision Template`
   Template: `None`
   Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

   [Vision Title]

   Northstar

   <We need to...>

   Context Diagram

   <Draw a picture with the solution as a black box showing all of the human (HMI) and machine (API) interfaces>

   Key Elements

<What are the key ideas that need to be solved for this project to be completed. These are elements inside the black box shown in the context diagram>

Key Functionality

<List or draw the major users and epics>

Measures

<What will increase/decrease if we succeed?>

Stakeholders

Stakeholder Type	Representative	Success Criteria	Additional Responsibilities
Sponsors			
End Users			
Partners			
Insiders			

Other Scope Considerations

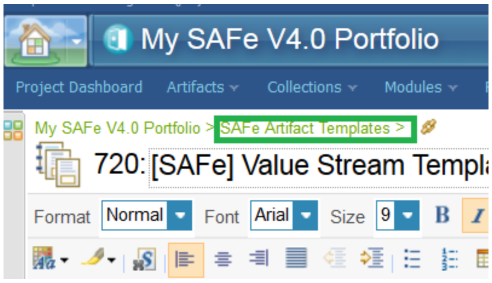
<Any other thoughts that help the team and outsiders understand the scope of the solution and project including things that are out of scope that are asked about frequently.>

Project Constraints

Type	Constraint	Source	Rationale
Schedule			
Budget			
Resources			
Technology			
Compliance			
Conformance			
Quality			

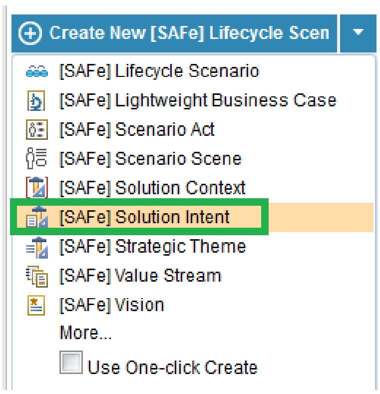
4. Click **Done**:

5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:

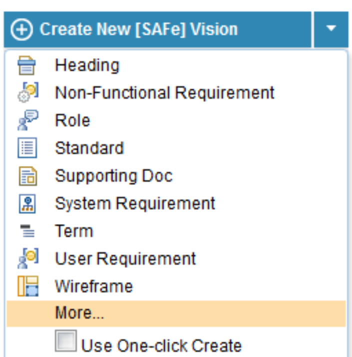


SOLUTION INTENT TEMPLATE

1. Select the drop-down arrow to create a new *[SAFe] Solution Intent* artifact template:

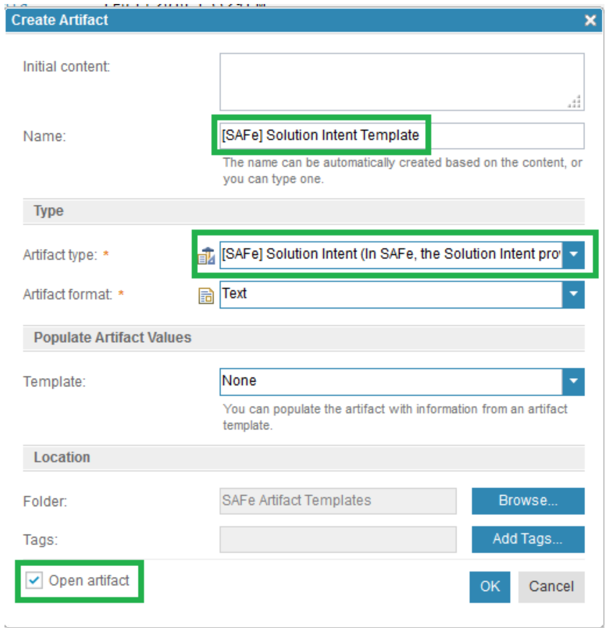


Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Solution Intent Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

   [Solution Intent Title]

   <Derived from the Value Stream Epic for the solution being described.>

   Vision

   <What is the vision for this specific solution?>

   Specifications

   <Describe specifications, link to Solution Context for details.>

   Architecture

   <Describe the critical architectural elements of the solution, if applicable.>

   Design

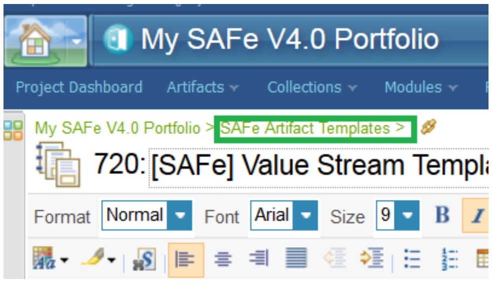
   <Describe the use cases and other design elements relevant at this level. Also describe any solution trade-offs that should be vetted with stakeholders and customers.>

   Tests

   <List the set of tests that must be performed in order to meet the Criteria for Success (provided by the associated Value Stream Epic for this Solution).>

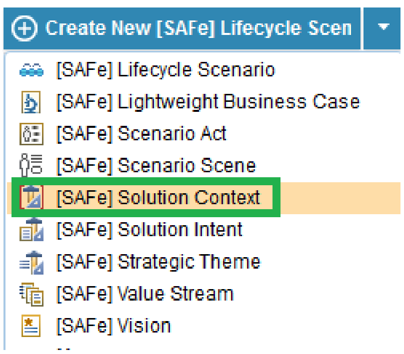
4. Click **Done**:

5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:

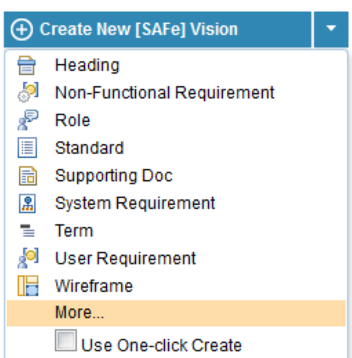


SOLUTION CONTEXT TEMPLATE

1. Select the drop-down arrow to create a new *[SAFe] Solution Context* artifact:

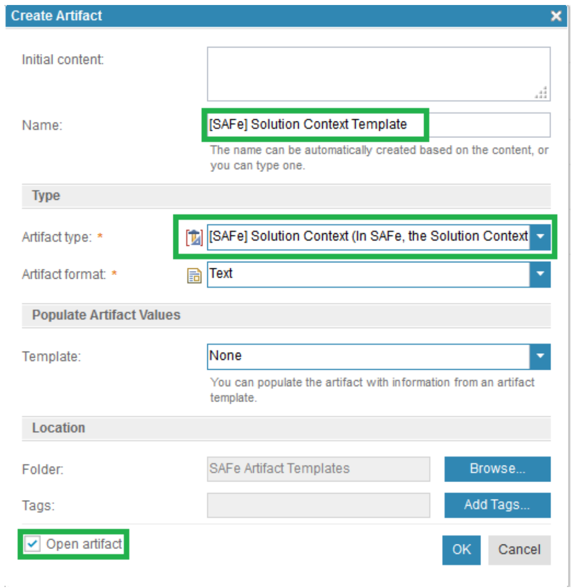


Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Solution Context Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Solution Context Title]

<Mapped to the Solution Intent title that is informed by this context.>

Installation

<Identify any installation considerations and constraints.>

Operating Environment

<Describe the operating environment, highlighting any distinctions for this solution above and beyond the Value Stream operating environment.>

Packaging

<Describe how the solution will be packaged, highlighting unique considerations.>

Support

<How will the solution be supported? List specific resources charged with ensuring that Support collateral is developed along with the solution. >

Enablement

<How will sellers and customers be enabled on the solution? List specific resources charged with ensuring that Enablement collateral is developed along with the solution. >

Services

<Will there be services associated with, or even packaged with, the solution? List specific resources charged with ensuring that Services collateral is developed along with the solution. >

Marketing

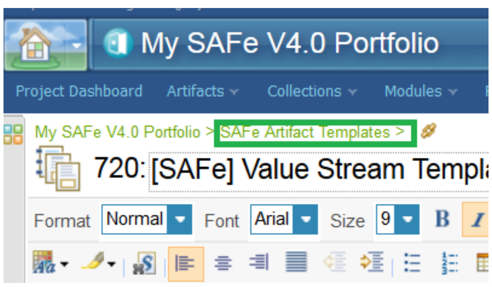
<How will the solution be marketed so that it is easily discoverable by customers? List specific resources charged with ensuring that Marketing collateral is developed along with the solution. Specifically describe the digital “try, buy, sell” plan.>

Selling

<How will the solution be sold? List specific resources charged with actually selling or developing the Sales collateral associated with the solution. >

4. Click **Done**:

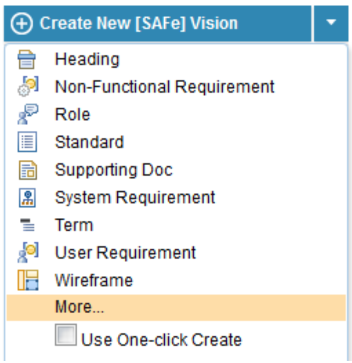
5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:



Lifecycle Scenario Template

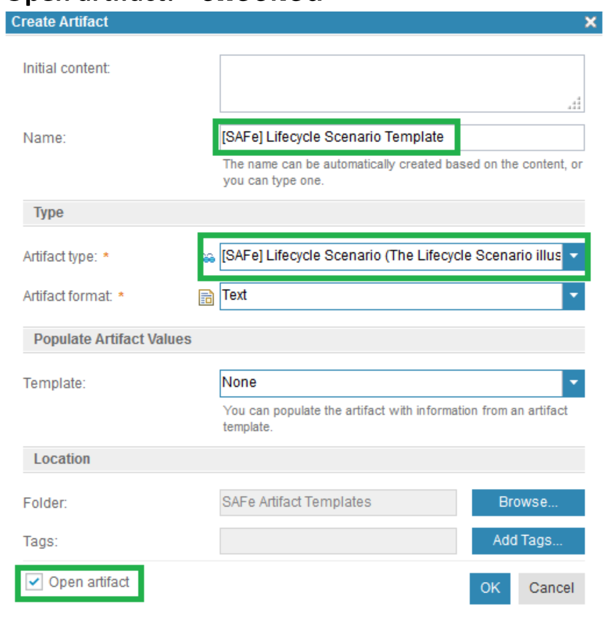
1. Select the drop-down arrow to create a new *[SAFe] Lifecycle Scenario* artifact template:

Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Lifecycle Scenario Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Lifecycle Scenario Title]

A <role/team> does <something> to <purpose>

Example: A Team Adopts DevOps to Reduce Time to Market

Purpose

<Describe briefly the activities that comprise the scenario.>

Example:

1. *Optimize speed of delivery*
2. *Prepare for the first iteration (Program Increment)*

Demonstrated Value

<List the value of the solution demonstrated by the lifecycle scenario.>

Roles

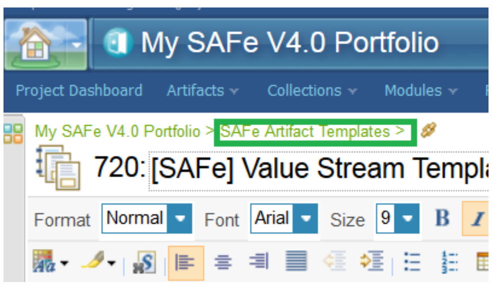
<List the roles involved in the lifecycle scenario.>

Acts

<Link and embed the Scenario Acts (as children).>

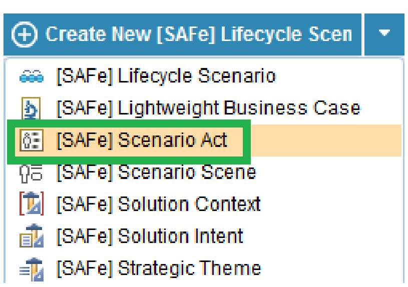
4. Click **Done**:

5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:

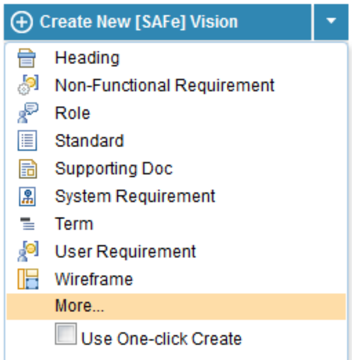


Scenario Act Template

1. Select the drop-down arrow to create a new *[SAFe] Scenario Act* artifact:

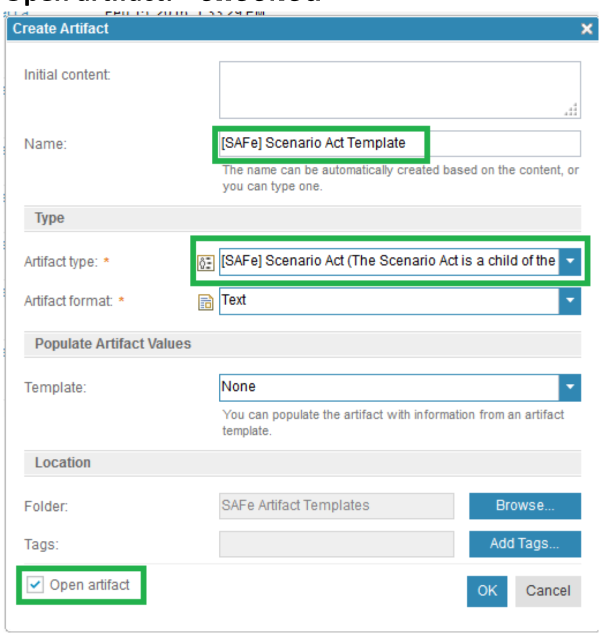


Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Scenario Act Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Scenario Act Title]

<Title of the activity>

Example: Align & Balance Program Backlogs

Description

<High-level description.>

Example: In this Act, the Portfolio and Program Teams collaborate to align the Program work for the next few Program Increments with the Portfolio priorities. As this happens, the Portfolio will be watching for any risks or impediments so that mitigation happens in near real time. This Act involves *both Portfolio and Program project areas, so roles change for the Program Leads depending on which project area is used.*

Roles

<List the roles involved in the scenario act.>

Input

<Describe any inputs into this activity.>

Output

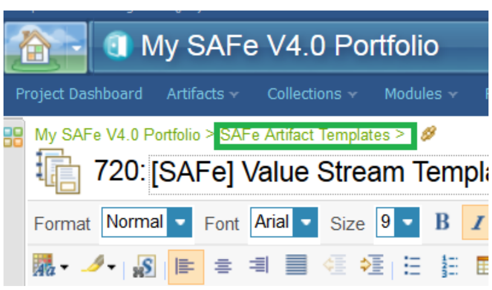
<Describe any outputs as a result of performing this activity.>

Scenes

<Link and embed the Scenario Scenes (as children).>

4. Click **Done**:

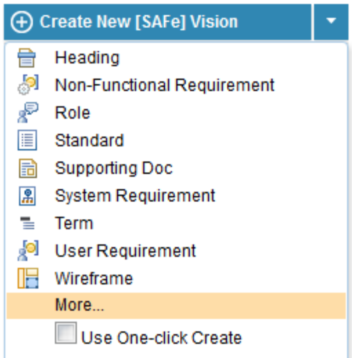
5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:



Scenario Scene Template

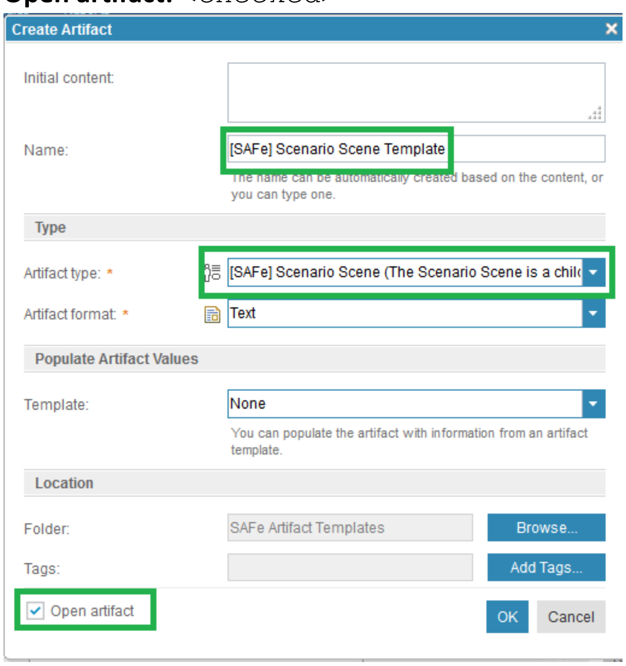
1. Select the drop-down arrow to create a new *[SAFe] Scenario Scene* artifact template:

Note: If you do not see the artifact type in the list, you need to click **More…** and then specify the type in the **Create Artifact** dialog box:



2. Specify these details:

Name: `[SAFe] Scenario Scene Template`
Template: `None`
Open artifact: `<checked>`



3. Copy and paste the following text into your new artifact:

[Scenario Scene Title]

<Title of the activity>

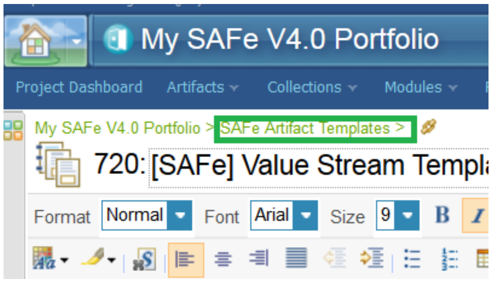
Example: Prepare for Release Planning

Narrative

<Provide the scene narrative as a series of steps performed by one or more roles.>

4. Click **Done**:

5. Click **SAFe Artifact Templates** in the breadcrumb trail at the top of your artifact to return to that folder:



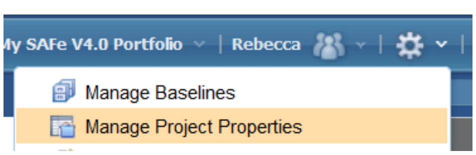
Now that all of your *[SAFe] xxx Templates* have been created, save them as **Artifact Templates.**

Persist Artifact Templates

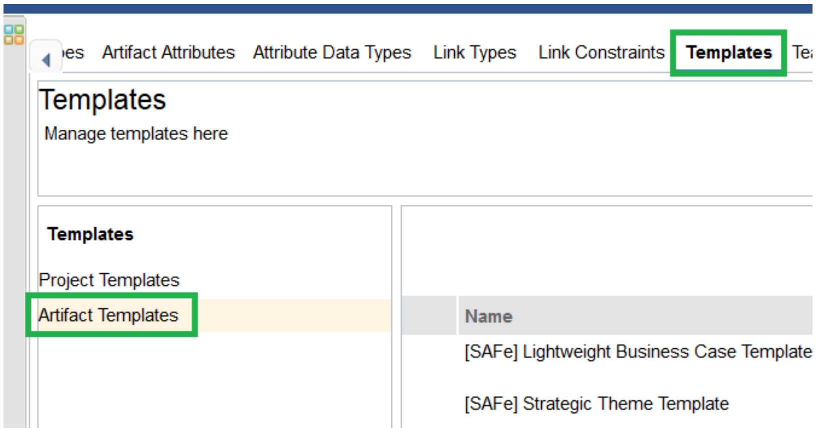
In this section, you will create persistent artifact templates for all of the templates you created in the previous section. Upon completion, you will have these Artifact Templates:

Name	Description	Artifact Type
[SAFe] Lifecycle Scenario Template	Template used to create a [SAFe] Lifecycle Scenario artifact.	[SAFe] Lifecycle Scenario
[SAFe] Lightweight Business Case	Template used to create Lightweight Business Case artifacts for a SAFe Value Stream.	[SAFe] Lightweight Business Case
[SAFe] Program Template	Template used to create a [SAFe] Program artifact.	[SAFe] Program
[SAFe] Scenario Act Template	Template used to create a [SAFe] Scenario Act artifact.	[SAFe] Scenario Act
[SAFe] Scenario Scene Template	Template used to create a [SAFe] Scenario Scene artifact.	[SAFe] Scenario Scene
[SAFe] Solution Context Template	Template used to create a [SAFe] Solution Context artifact.	[SAFe] Solution Context
[SAFe] Solution Intent Template	Template used to create a [SAFe] Solution Intent artifact.	[SAFe] Solution Intent
[SAFe] Strategic Theme Template	Template used to create Strategic Theme artifacts for a SAFe Portfolio.	[SAFe] Strategic Theme
[SAFe] Value Stream Template	Template used to create a [SAFe] Value Stream artifact.	[SAFe] Value Stream
[SAFe] Vision Template	Template used to create a [SAFe] Vision artifact.	[SAFe] Vision

1. Select **Manage Project Properties** from the **Administration** drop-down menu:



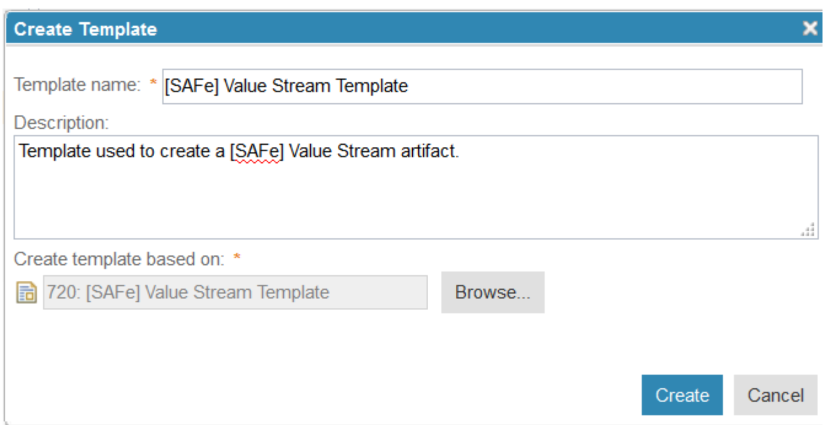
2. Click **Templates** on the menu bar, then **Artifact Templates** in the **Templates** pane:



3. For each *[SAFe] xxx Template* you created, create a new Artifact Template:

   a. Click + **New Template…** :
   b. Specify these details:

      Template name: `[SAFe] Value Stream Template`
      Description: `Template used to create a [SAFe] Value Stream artifact.`
      Create template based on: <Browse to SAFe Artifact Templates and select Template artifact>



   c. Click **Create**.
   d. Repeat the steps above for the following templates:

      Template name: `[SAFe] Program Template`
      Description: `Template used to create a [SAFe] Program artifact.`

      Template name: `[SAFe] Vision Template`
      Description: `Template used to create a [SAFe] Vision artifact.`

      Template name: `[SAFe] Solution Intent Template`
      Description: `Template used to create a [SAFe] Solution Intent artifact.`

Template name: [SAFe] Solution Context Template
Description: Template used to create a [SAFe] Solution Context artifact.

Template name: [SAFe] Lifecycle Scenario Template
Description: Template used to create a [SAFe] Lifecycle Scenario artifact.

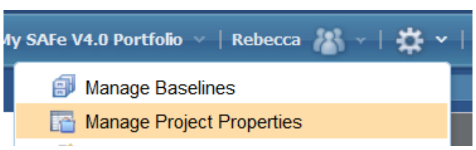
Template name: [SAFe] Scenario Act Template
Description: Template used to create a [SAFe] Scenario Act artifact.

Template name: [SAFe] Scenario Scene Template
Description: Template used to create a [SAFe] Scenario Scene artifact.

CREATE THE SAFE 4.0 PORTFOLIO PROJECT TEMPLATE

You now have a Rational DOORS Next Generation project area configured to support SAFe V4.0 and can create a new project template.

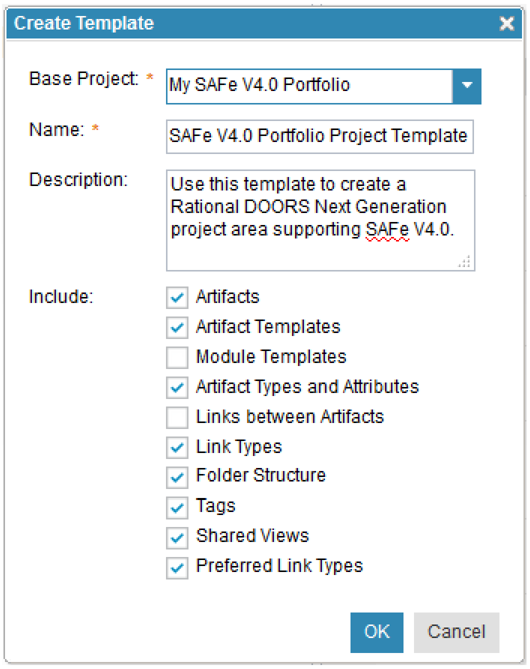
1. Select **Manage Project Properties** from the **Administration** drop-down menu:



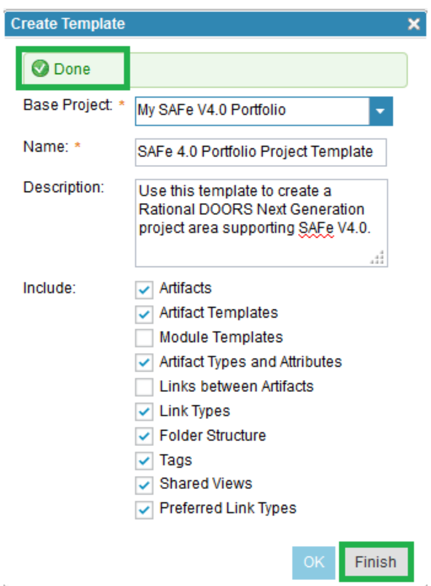
2. Click **Templates** on the menu bar, then **Project Templates** in the **Templates** pane. Select + **New Template…** to add a new project template:

3. In the **Create Template** dialog, specify these details:

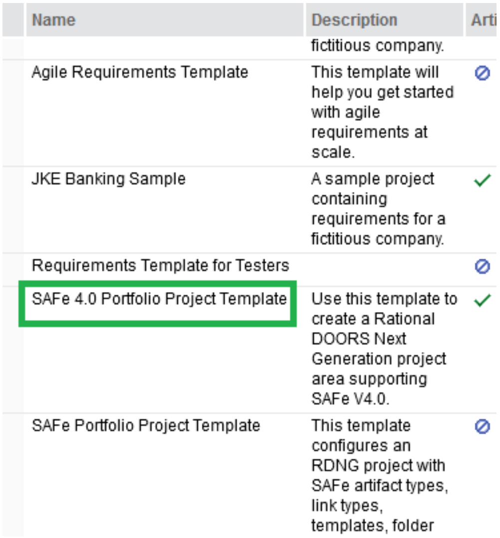
Base Project: My SAFe V4.0 Portfolio
Name: SAFe V4.0 Portfolio Project Template
Description: Use this template to create a Rational DOORS Next Generation project area supporting SAFe V4.0.
Include: <All except **Module Templates** and **Links between Artifacts**>



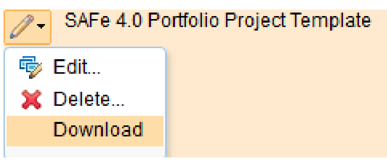
4. Click **OK** and then **Finish** when the process is complete:



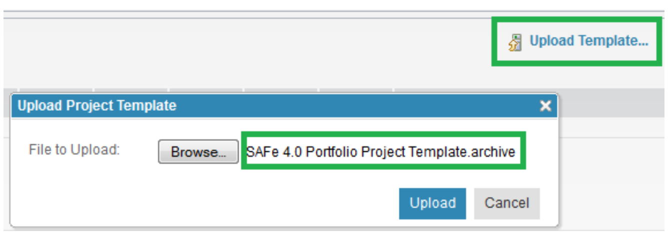
You should see your new template is in the list of Project Templates:



5. Select the **Action** menu and then **Download**:



6. Save the file to a local directory. To use this project template in another RDNG instance, you simply go to this same **Templates** browser page in the new environment and select **Upload Template…** :

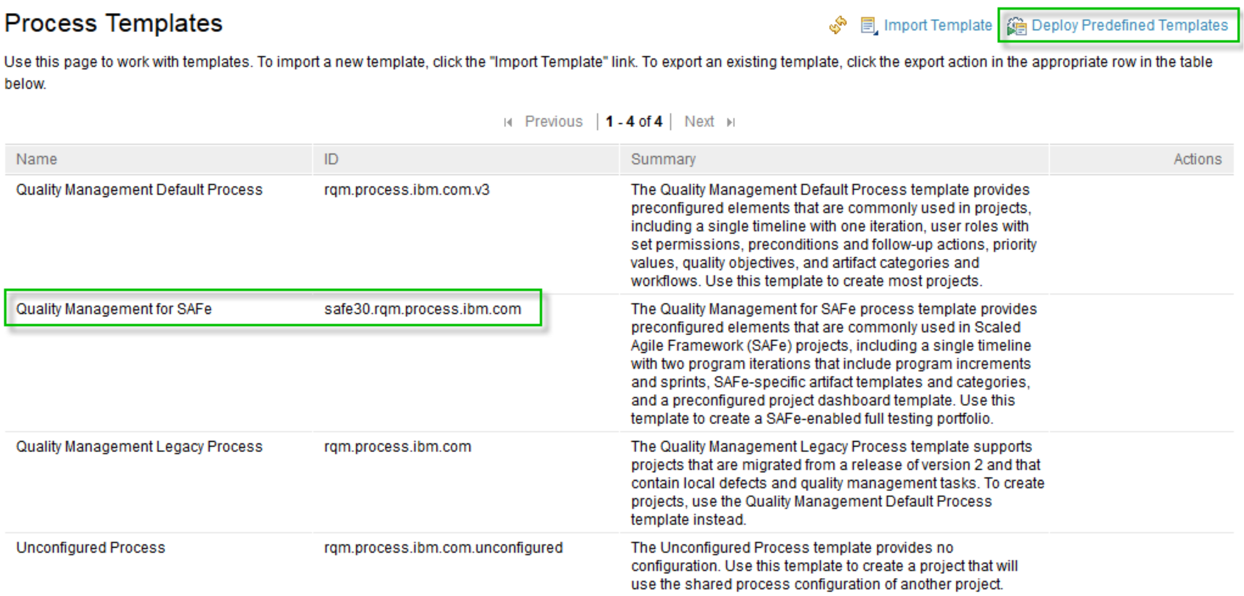


Congratulations! You have completed the SAFe V4.0 configuration for Rational DOORS Next Generation.

RATIONAL QUALITY MANAGER TEMPLATE CONFIGURATION

CONFIGURE RQM PROCESS TEMPLATE (BROWSER)

1. Launch RQM's Administration Page in your browser and log on as an Administrator.
2. Navigate to the Templates page by selecting the **Template** option from the menu bar.
   Ensure you have the SAFe predefined templates deployed. If you do not see these process templates, click the **Deploy Predefined Templates** link.



Process Templates

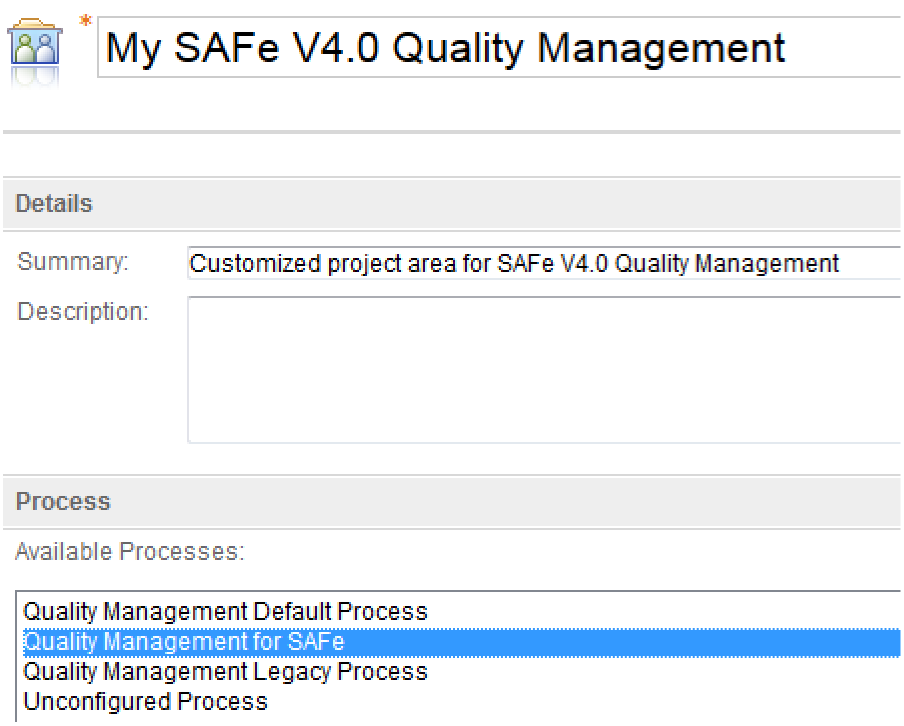
Import Template | Deploy Predefined Templates

Use this page to work with templates. To import a new template, click the "Import Template" link. To export an existing template, click the export action in the appropriate row in the table below.

Previous | 1 - 4 of 4 | Next

Name	ID	Summary	Actions
Quality Management Default Process	rqm.process.ibm.com.v3	The Quality Management Default Process template provides preconfigured elements that are commonly used in projects, including a single timeline with one iteration, user roles with set permissions, preconditions and follow-up actions, priority values, quality objectives, and artifact categories and workflows. Use this template to create most projects.	
Quality Management for SAFe	safe30.rqm.process.ibm.com	The Quality Management for SAFe process template provides preconfigured elements that are commonly used in Scaled Agile Framework (SAFe) projects, including a single timeline with two program iterations that include program increments and sprints, SAFe-specific artifact templates and categories, and a preconfigured project dashboard template. Use this template to create a SAFe-enabled full testing portfolio.	
Quality Management Legacy Process	rqm.process.ibm.com	The Quality Management Legacy Process template supports projects that are migrated from a release of version 2 and that contain local defects and quality management tasks. To create projects, use the Quality Management Default Process template instead.	
Unconfigured Process	rqm.process.ibm.com.unconfigured	The Unconfigured Process template provides no configuration. Use this template to create a project that will use the shared process configuration of another project.	

3. Select *Project Areas > Create > Project Area* from the menu bar and create a new SAFe V4.0 Quality Management Portfolio project area based on the existing **Quality Management for SAFe** 3.0 template:



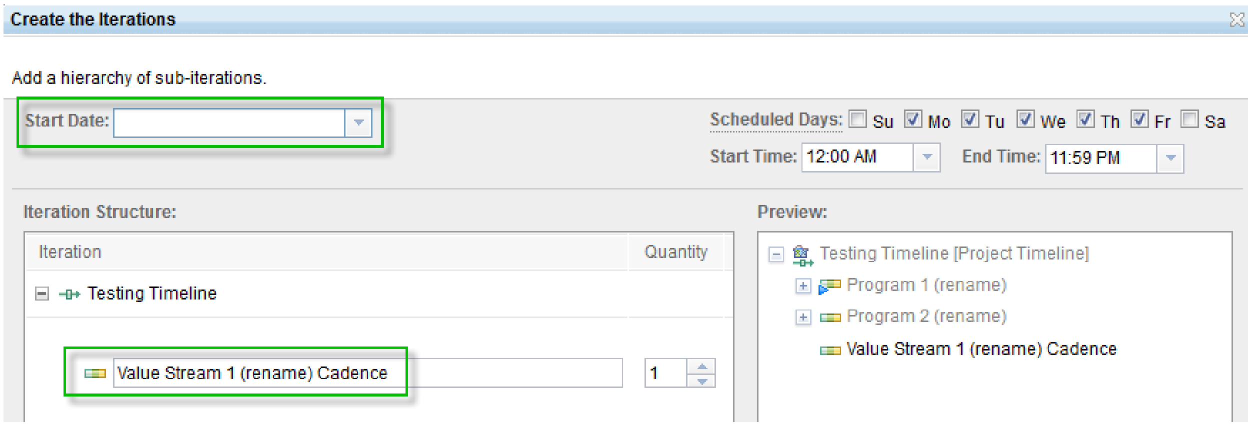
4. Add the Administrator user as a member of the project with the **Test Team Member** role.

Update the project area characteristics as described in the sections below.

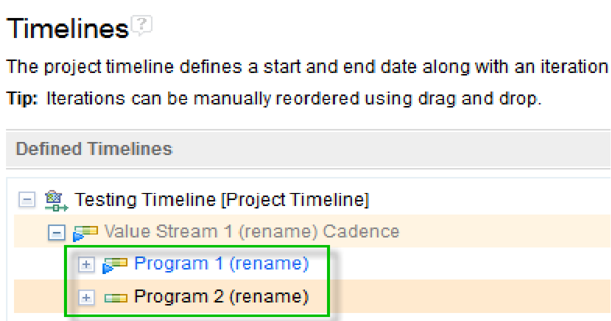
Timelines

Update the Timeline hierarchy to include the Value Stream level.

1. Select the **Timelines** option in the left navigation bar.
2. Create a Value Stream (Cadence) iteration at the top level of the timeline by clicking on the **Create Iterations…** button on the right.
3. Name the iteration `Value Stream 1 (rename) Cadence` and clear the **Start Date** by clicking in the field and using the delete or backspace key. Click **OK**.



4. Drag and drop the **Program 1 (rename)** and **Program 2 (rename)** iterations on top of the **Value Stream 1 (rename) Cadence** iteration so they are children of the Value Stream iteration.

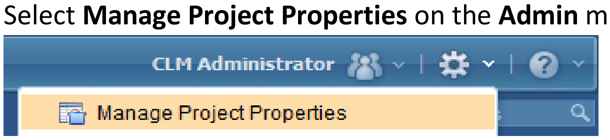


5. Save the project area by clicking the **Save** button in the upper right corner.

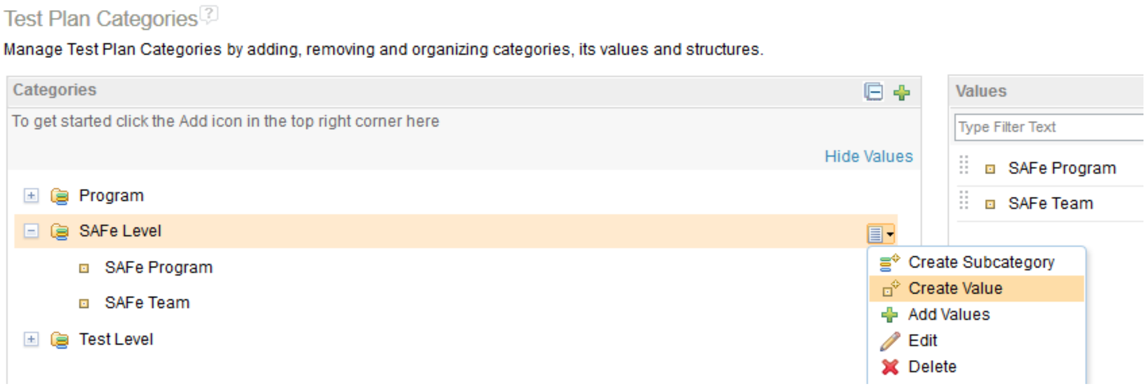
Artifact Categories

Add the Value Stream option to SAFe Level and make Program a multivalued option.

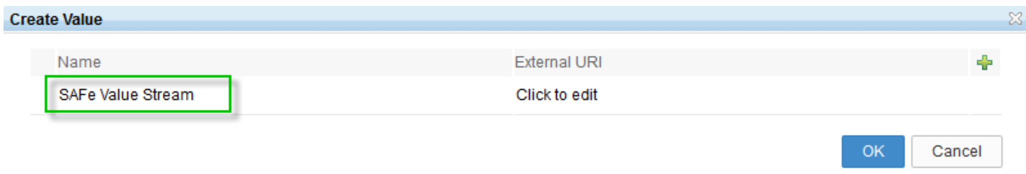
1. Open the project area dashboard by clicking on the **Explore Project** button.
2. Select **Manage Project Properties** on the **Admin** menu.



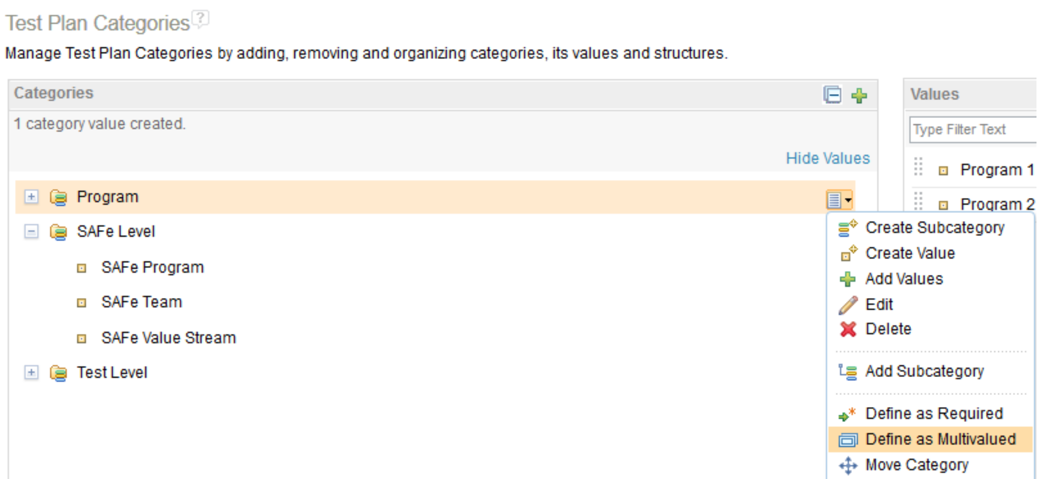
3. Expand **Artifact Categories** on the left and click on **Test Plan Categories**.
4. Add a new value to **SAFe Level** by clicking on **Create Value** on the **Action** menu.



5. Name the value `SAFe Value Stream` and click **OK**.



6. Set the **Program** category to allow multiple selections by clicking on **Define as Multivalued** on the **Action** menu.

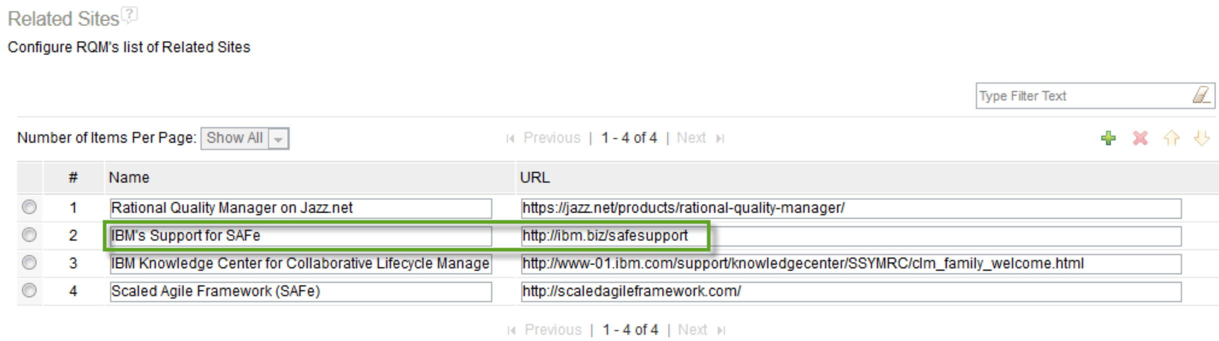


7. Save your changes.

Related Sites

Update the IBM's Support for SAFe link.

1. On the **Manage Project Properties** screen, expand **Properties** on the left and click on **Related Sites**.
2. Change the **URL** value for **IBM's Support for SAFe** to: `http://ibm.biz/safesupport`

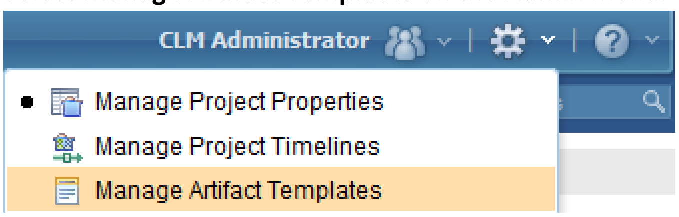


3. Save your changes.

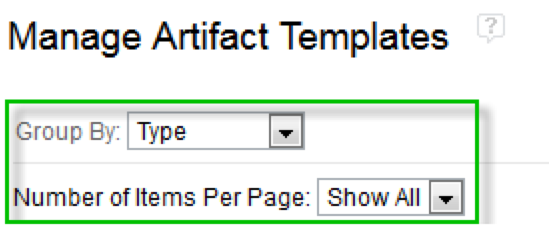
Artifact Templates

Create a Value Stream Test Plan template.

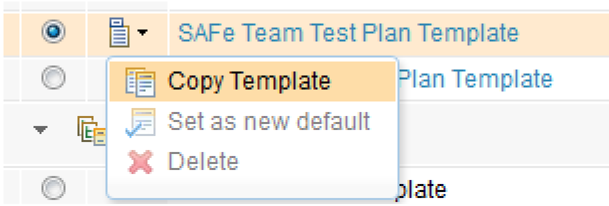
1. Select **Manage Artifact Templates** on the **Admin** menu.



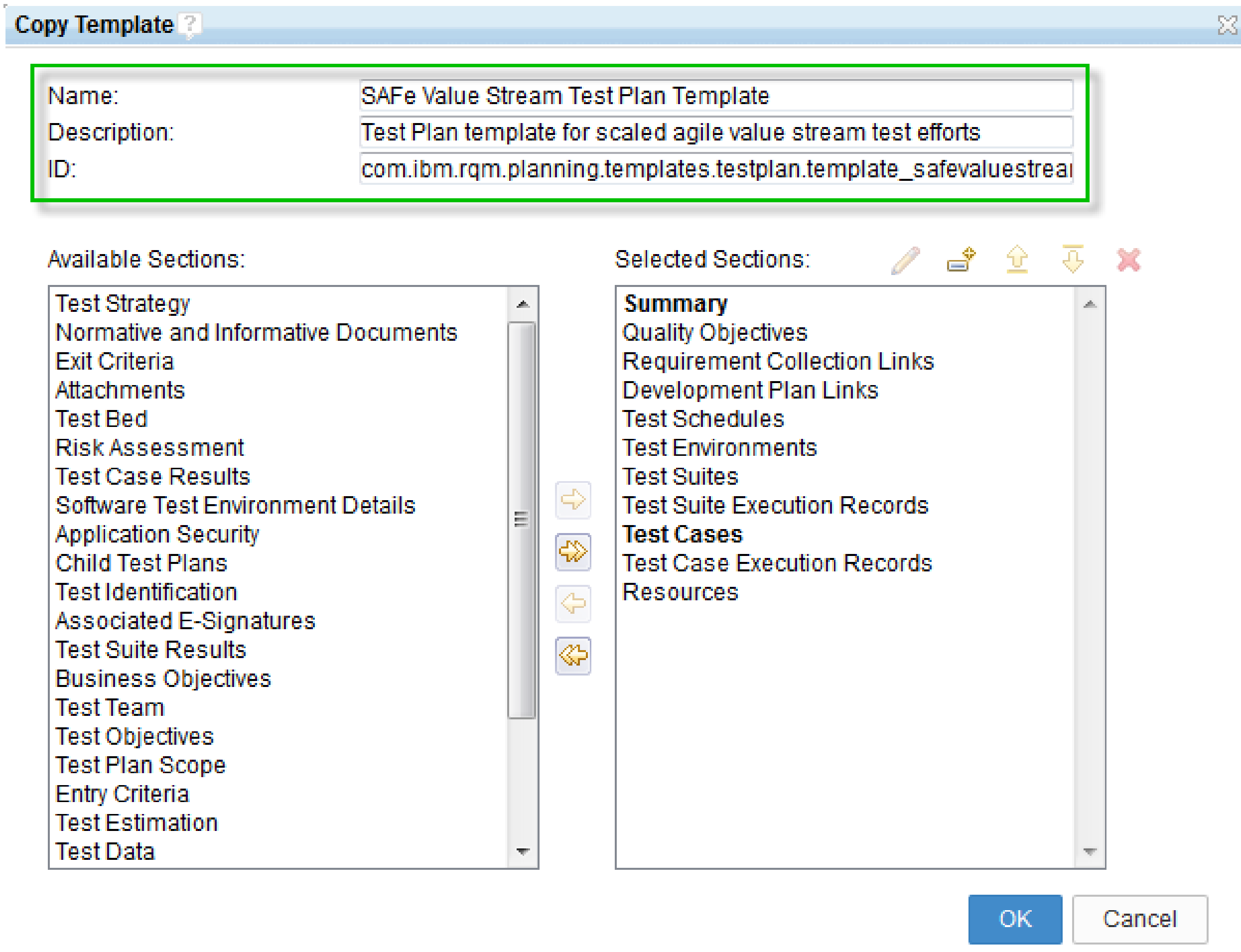
2. Group by **Type** and select **Show All** to see all the available templates.



3. Select the **SAFe Team Test Plan Template** and click **Copy Template** on the Action menu.



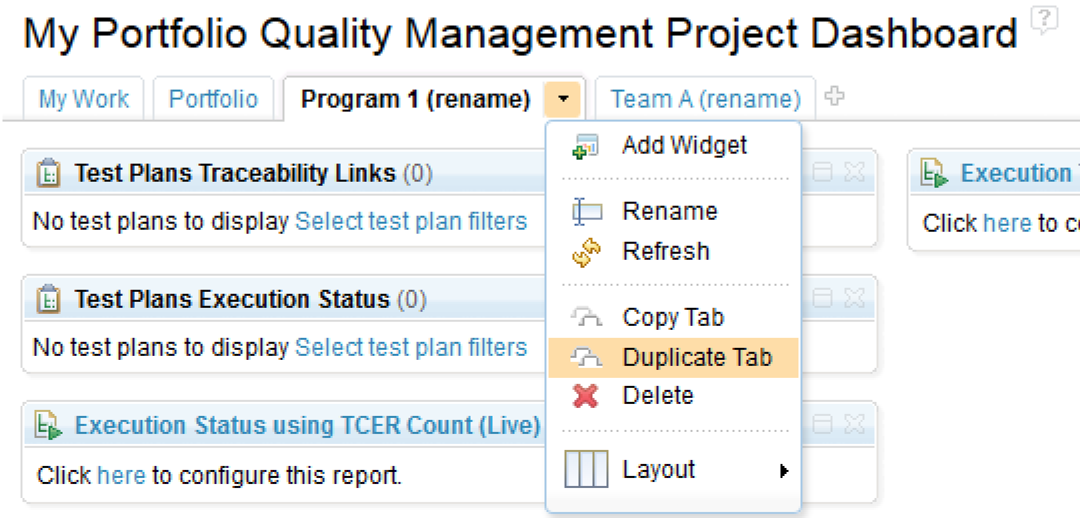
4. Set the following fields to create the Value Stream Test Plan Template and click **OK**:
   a. **Name:** `SAFe Value Stream Test Plan Template`
   b. **Description:** `Test Plan template for scaled agile value stream test efforts`
   c. **ID:** `com.ibm.rqm.planning.templates.testplan.template_safevaluestream`



Dashboard

Add a Value Stream tab to the project dashboard.

1. Navigate to the project area dashboard and click on the **Program 1 (rename)** tab.
2. Click the tab down arrow and select **Duplicate Tab**.



3. See that there are now two Program 1 (rename) tabs. Rename the one on the left to `Value Stream 1 (rename)` and save your changes.

CONFIGURE RQM PROCESS TEMPLATE (ECLIPSE)

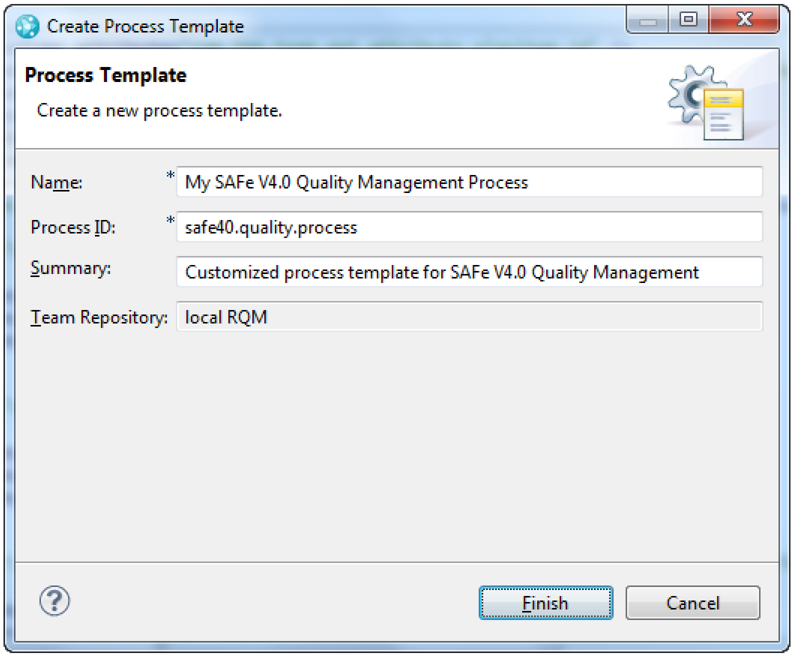
The next set of changes must be performed in the Eclipse client.

1. Launch the Rational Team Concert Eclipse client and establish a Repository Connection to RQM.
2. Right-click on the Repository Connection, choose **Managed Connected Project Areas** and select your **Portfolio Quality Management** project area.

EXTRACT PROCESS TEMPLATE

You are now ready to extract the process template you've configured in your Portfolio Quality Management project area.

1. Right-click on your **Portfolio Quality Management** project area and select **Extract Process Template…**
2. Enter the following information:
    a. **Name:** `My SAFe V4.0 Quality Management Process`
    b. **Process ID**: `safe40.quality.process`
    c. **Summary**: `Customized process template for SAFe V4.0 Quality Management`

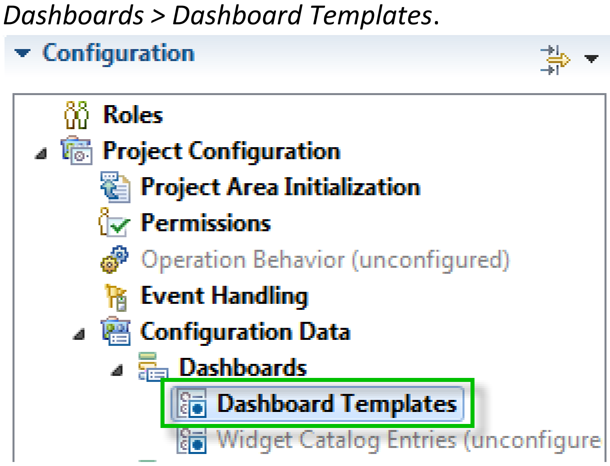


3. Click **Finish**. The new Process Template is opened for editing.

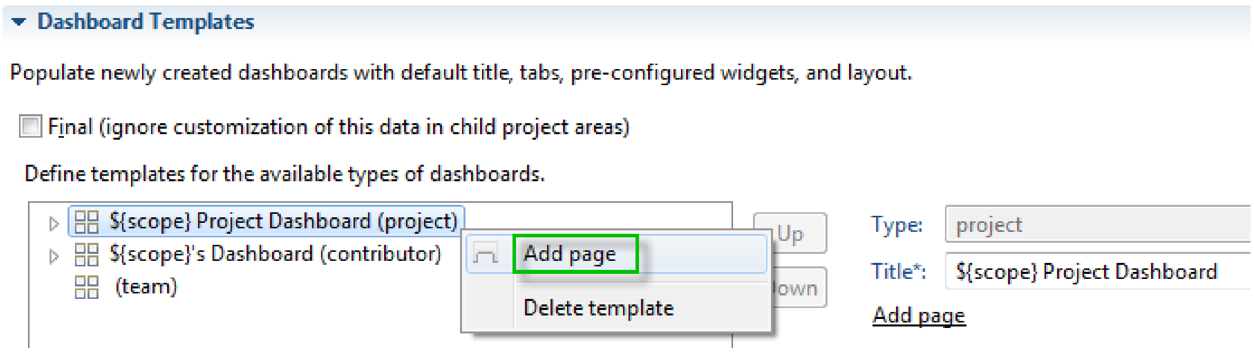
Dashboard Template

In this section, you create the Value Stream dashboard template and viewlets so that they are pre-populated when creating a new Portfolio Quality Management project area from your new process template.

1. Click the **Process Configuration** tab and navigate to *Project Configuration > Configuration Data > Dashboards > Dashboard Templates*.

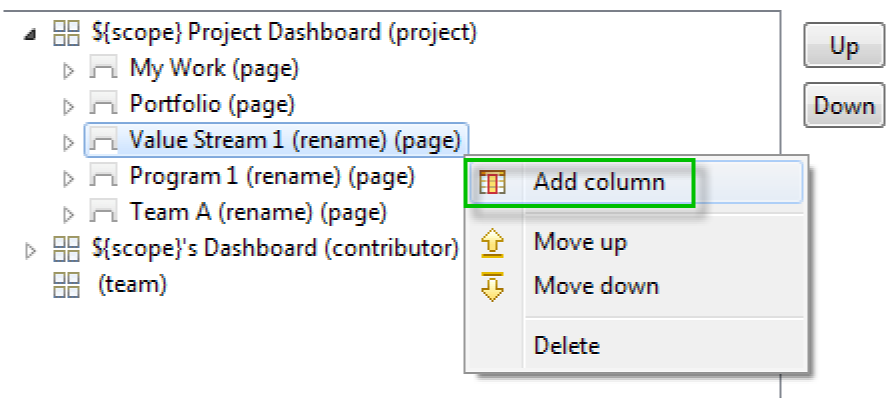


2. In the **Dashboard Templates** area on the right, right-click on **${scope} Project Dashboard (project)** and select **Add page**.

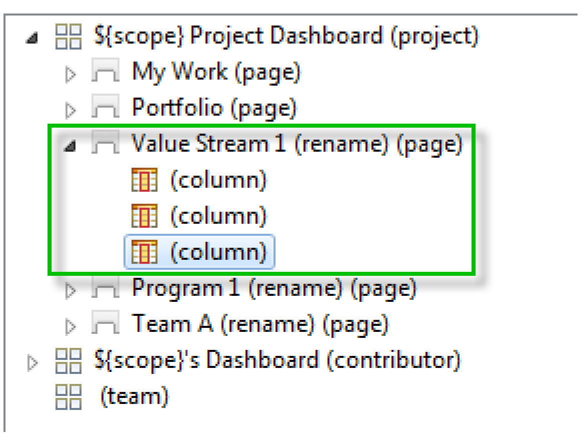


3. Title the page `Value Stream 1 (rename)` and move it up to just after the **Portfolio** page using the **Up** button.

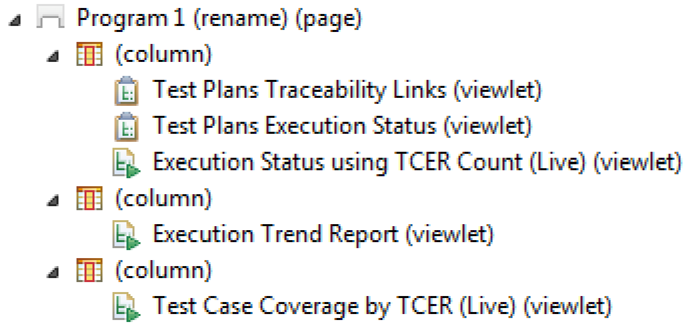
4. Right-click on the **Value Stream 1 (rename) (page)** and select **Add column**.



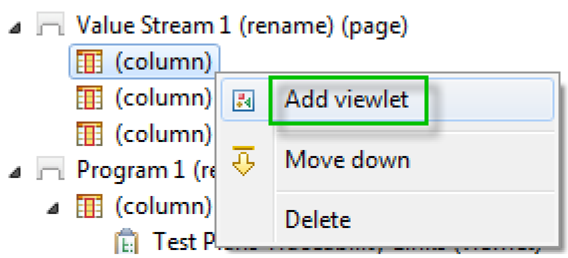
5. Repeat the previous step so you have three columns.



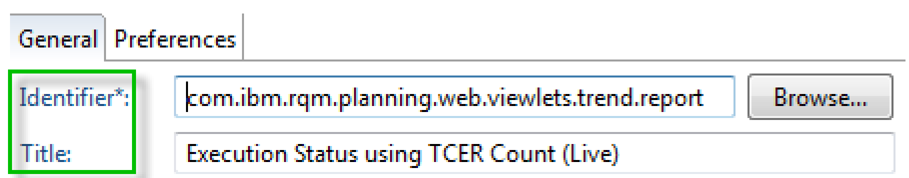
6. Expand the **Program 1 (rename) (page)** and duplicate the viewlets that are on the Program 1 (rename) page by performing the following steps for each viewlet:

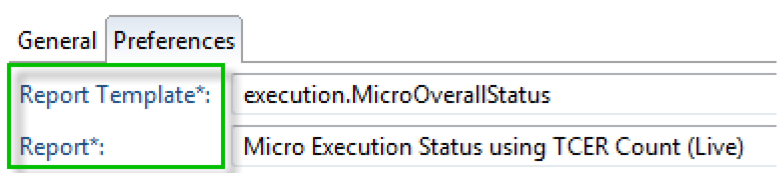


   a. Add a viewlet to the appropriate **Value Stream 1 (rename) (page)** column by right-clicking on the column and selecting **Add viewlet**.

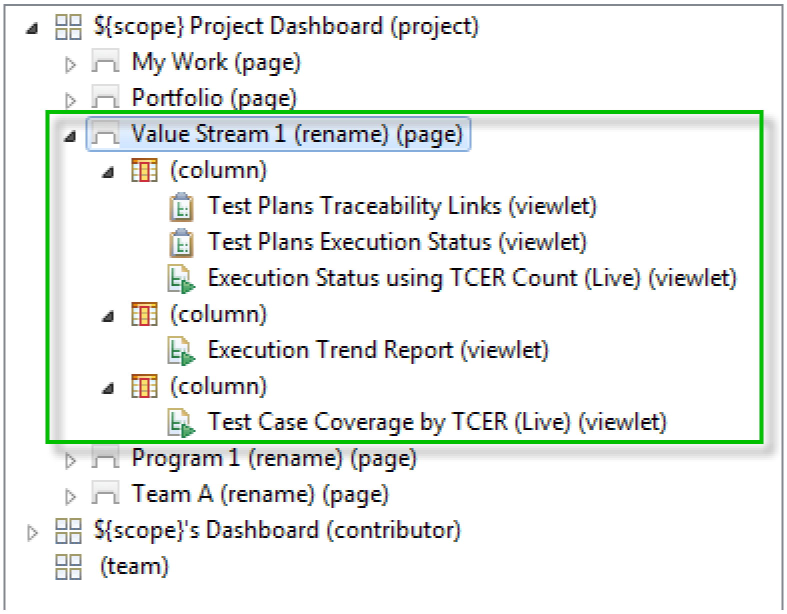


   b. Click on the corresponding **Program 1 (rename)** viewlet and copy and paste the following information to the new **Value Stream 1 (rename)** viewlet:
      1. General tab: **Identifier**
      2. General tab: **Title** (when populated on Program 1 (rename) viewlet)
      3. Preferences tab: **Report Template** (when populated on Program 1 (rename) viewlet)
      4. Preferences tab: **Report** (when populated on Program 1 (rename) viewlet)





   c. Repeat steps a – b above for all five viewlets to duplicate the **Program 1 (rename)** viewlets on the **Value Stream 1 (rename)** page.

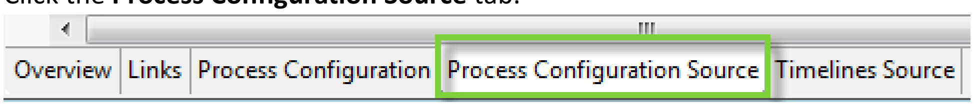


d. Save your changes.

Related Sites

In this section, you update the IBM's Support for SAFe link so that it is correct when creating a new Portfolio Quality Management project area from your new process template.

1. Click the **Process Configuration Source** tab.



2. Search for `RQM_RELATED_LINKS`.

```
<property name="RQM_RELATED_LINKS">
    <options>
        <option id="1" name="Rational Quality Manager on Jazz.net"
        <option id="2" name="IBM's Support for SAFe" url="https://w
        <option id="3" name="IBM Knowledge Center for Collaborative
        <option id="4" name="Scaled Agile Framework (SAFe)" url="ht
    </options>
</property>
```

3. On the *IBM's Support for SAFe* line, change the **url** to "`http://ibm.biz/safesupport`"

```
<property name="RQM_RELATED_LINKS">
    <options>
        <option id="1" name="Rational Quality Manager on Jazz.net" url="https://jazz.net/products/rat
        <option id="2" name="IBM's Support for SAFe" url="http://ibm.biz/safesupport"/>
        <option id="3" name="IBM Knowledge Center for Collaborative Lifecycle Management" url="http:/
        <option id="4" name="Scaled Agile Framework (SAFe)" url="http://scaledagileframework.com/"/>
    </options>
</property>
```

4. Save your changes.

Congratulations! You have completed all the changes to the Quality Management process template for SAFe V4.0.