IBM®

CONFIGURATION GUIDE

IBM Engineering Lifecycle Management v7.0.2
SAFe v6.0

In this document, we provide step-by-step guidance to configure tooling environment for SAFe Portfolio, Large Solution, Portfolio or Essential SAFe 6.0 configuration in IBM Engineering Lifecycle Management 7.0.2 using SAFe 6.0 templates.

April, 2023

Bhawana Gupta

bhawana.gupta@in.ibm.com

1 TABLE OF CONTENTS

HOW TO USE THE SAFE® 6.0 TEMPLATES IN IBM ENGINEERING LIFECYCLE MANAGEMENT (ELM)

This document explains how to deploy the SAFe 6.0 templates in ELM 7.0.2 and create project areas to support SAFe Portfolio, Large Solution, Program and Team levels.

1 Download the SAFe 6.0 templates

Before you can create project areas using SAFe 6.0 templates, you must deploy the templates into ELM in each of the ELM 7.0.2 applications.

Download the SAFe 6.0 templates to your local machine. These templates can be found on the IBM ELM Templates for SAFe® article on jazz.net. There are 2 templates for SAFe 6.0 Configurations: Essential and Full which can be used to create tooling environments for Full, Large Solution, Portfolio or Essential SAFe 6.0 configurations.

2 Deploy SAFe 6.0 templates in your ELM environment

2.1 Deploy the EWM template(s)
__1.   Launch the Application Administration page for Engineering Workflow Management (EWM) in your browser: https://<host>:<port>/ccm/admin.
__2.   Click the Templates link in the menu bar.
__3.   Click the Import Template link in the top right corner.
__4.   Browse to the location where you have downloaded the EWM templates and choose each of the ones you want to import them into your Process Templates list.
__5.   You should see something like this for each of the templates you choose to import:

2.2 Deploy the ETM templates
__1.   Launch the Application Administration page for Engineering Test Management (ETM) in your browser: https://<host>:<port>/qm/admin.
__2.   Click the Templates link in the menu bar.
__3.   Click the Import Template link in the top right corner.

__4.   Browse to the location where you have downloaded the ETM templates and choose each of the ones you want to import them into your Process Templates list.

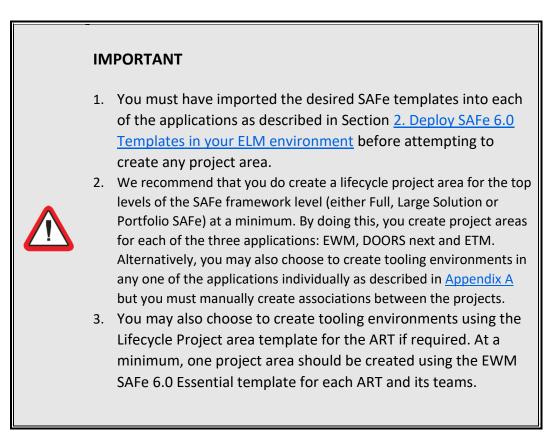__5.   You should something like this for each of the templates you choose to import:

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 - 11 of 11** | Next

Name	ID	Summary	Actions
Engineering Test Management v1.0.2 for Automotive Compliance	elm_automotive_compliance_v102.qm.process.ibm.com	This Quality Management template provides preconfigured elements for commonly used systems engineering test management practices to support compliance with ASPICE and ISO 26262.	
Engineering Test Management v1.0.3 for Automotive Compliance	elm_automotive_compliance_v103.qm.process.ibm.com	This Quality Management template provides preconfigured elements for commonly used systems engineering test management practices to support compliance with ASPICE, ISO 26262, and ISO/SAE 21434.	
IBM Solution for ELM - Quality Management Process	elm-qm.process.ibm.com	This process template supports teams using Quality Management.	
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 Essential SAFe 4.6	safe46essential.rqm.process.ibm.com	The Quality Management for Essential SAFe 4.6 is a template that can be used to establish an "Essential SAFe" configuration as specified by the SAFe 4.6 framework.	
Quality Management for Essential SAFe 5.0	safe50essential.rqm.process.ibm.com	The Quality Management for Essential SAFe 5.0 is a template that can be used to establish an "Essential SAFe" configuration as specified by the SAFe 5.0 framework.	
Quality Management for Essential SAFe 6.0	safe60essential.process.ibm.com	The Quality Management for Essential SAFe 6.0 is a template that can be used to establish an "Essential SAFe" configuration as specified by the SAFe 6.0 framework.	
Quality Management for Full SAFe 4.6	safe46full.rqm.process.ibm.com	The Quality Management for Full SAFe 4.6 is a template that can be used to establish a "Full SAFe" configuration as specified by the SAFe 4.6 framework.	
Quality Management for Full SAFe 5.0	safe50full.rqm.process.ibm.com	The Quality Management for Full SAFe 5.0 is a template that can be used to establish a "Full SAFe" configuration as specified by the SAFe 5.0 framework.	
Quality Management for Full SAFe 6.0	safe60full.process.ibm.com	The Quality Management for Full SAFe 6.0 is a template that can be used to establish a "Full SAFe" configuration as specified by the SAFe 6.0 framework.	
Systems Global Configuration	sgc.rqm.process.ibm.com	The Systems Global Configuration Process template is derived from the Quality Management Default Process template and provides example configurations, category values, quality objectives, iteration dates, and dashboard content. Use this template only for sample projects that are not used for production.	

2.3 Deploy the DOORS Next templates

__1. Launch the Application Administration page for ERM - DOORS Next in your browser: https://<host>:<port>/rm/admin.

__2. Click the Project Areas > Active Project Areas link in the menu bar.

__3. [OPTIONAL] If you do not have any active DOORS Next project areas, you will need to create one in order to deploy the SAFe templates. Use the Create Project Area menu option to create a "dummy" DOORS Next project area:

__4. Select an active DOORS Next project area (or the "dummy" you created in (the previous step), then Explore Project.

__5. Select Manage Project Properties from the Administration drop-down list in the top right corner.

__6. Select the Templates link.

__7. In the Templates selection box in the left pane, select Project Templates.

__8. Click the Upload Template… link in the top right corner.

__9. Browse to the location where you have downloaded the DOORS Next templates and choose each of the ones you want to import them into your Project Templates list.

__10. You should something like this for each of the templates you choose to import:

2.4 Deploy the ELM Lifecycle Project Area (LPA) templates

__1. Launch the Lifecycle Project Administration page for the Jazz Team Server in your browser: https://<host>:<port>/jts/lpa.

__2. Click the Templates link in the menu bar.

__3. Click the Import Template link in the top right corner.

__4. Browse to the location where you have downloaded the ELM LPA templates and choose each to import them into your Process Templates list.

__5. You should see something like this after the import has been completed:

3 CREATE TOOLING ENVIRONMENT

IMPORTANT

1. You must have imported the desired SAFe templates into each of the applications as described in Section 2. Deploy SAFe 6.0 Templates in your ELM environment before attempting to create any project area.
2. We recommend that you do create a lifecycle project area for the top levels of the SAFe framework level (either Full, Large Solution or Portfolio SAFe) at a minimum. By doing this, you create project areas for each of the three applications: EWM, DOORS next and ETM. Alternatively, you may also choose to create tooling environments in any one of the applications individually as described in Appendix A but you must manually create associations between the projects.
3. You may also choose to create tooling environments using the Lifecycle Project area template for the ART if required. At a minimum, one project area should be created using the EWM SAFe 6.0 Essential template for each ART and its teams.

You can create Project Areas for Full, Portfolio Large Solution and Essential SAFe tooling environments, as desired. Follow the instructions in any of the sections below to setup project areas for SAFe 6.0 configuration of your choice.

3.1 Full SAFe

3.1.1 CREATE PROJECT FOR PORTFOLIO AND SOLUTION TRAIN FLOW

__1. Launch the Jazz Team Server (JTS) Application Administration page in your browser:

https://<host>:<port>/jts/lpa

__2.   Enter a Project Area Name (each application project area will have this name with a modifier for that application).

__3.   Select the Full SAFe template from the Template drop down list:

__4.   Click Save to create your ELM LPA.

3.1.2 CREATE PROJECT FOR ARTS AND TEAM FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin

__2.   Select Project Areas > Create > Project Area from the menu.

__3.   Enter a Project Area Name.

__4.   Select the Essential SAFe 6.0 process template.

__5.   Save your changes.

__6.   Repeat the steps to create a separate project for each ART.

3.1.3 CREATE ASSOCIATIONS BETWEEN PROJECTS OF THE PORTFOLIO AND ART FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin

__2.   Open the Project Areas that was created using the Full tenplate

__3.   Add the Uses and Provides association between this project and all projects of the ART

3.1.4 PREPARE THE PROJECT AREAS

__1.   Create teams, categories and add team members with the right roles to get started for each of the projects.

Congratulations! Your Full SAFe 6.0 tooling environment is now ready for you to configure and get started!

3.2 Large Solution SAFe

3.2.1 CREATE PROJECT FOR SOLUTION TRAIN FLOW

__1.   Launch the Jazz Team Server (JTS) Application Administration page in your browser:
https://<host>:<port>/jts/lpa

__2.   Enter a Project Area Name (each application project area will have this name with a modifier for that application).

__3.   Select the Full SAFe template from the Template drop down list:

__4.   Click Save to create your ELM LPA.

3.2.2 CREATE PROJECT FOR ARTS AND TEAM FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin

__2.   Select Project Areas > Create > Project Area from the menu.

__3.   Enter a Project Area Name.

__4.   Select the Essential SAFe 6.0 process template.

__5.   Save your changes.

__6.   Repeat the steps to create a separate project for each ART.

3.2.3 CREATE ASSOCIATIONS BETWEEN PROJECTS OF THE PORTFOLIO AND ART FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin

__2.   Open the Project Areas that was created using the Full tenplate

__3.   Add the Uses and Provides association between this project and all projects of the ART

3.2.4 PREPARE THE PROJECT AREAS

__1.   Create teams, categories and add team members with the right roles to get started for each of the projects.

__2.   Archive the Portfolio Epic work item type.

Congratulations! Your Large Solution SAFe6.0 tooling environment is now ready for you to configure and get started!

3.3 Portfolio SAFe

3.3.1 CREATE PROJECT FOR PORTFOLIO FLOW

__1.   Launch the Jazz Team Server (JTS) Application Administration page in your browser:
https://<host>:<port>/jts/lpa

__2.   Enter a Project Area Name (each application project area will have this name with a modifier for that application).

__3.   Select the Full SAFe template from the Template drop down list:

__4.   Click Save to create your ELM LPA.

3.3.2 CREATE PROJECT FOR ARTS AND TEAM FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin

__2.   Select Project Areas > Create > Project Area from the menu.

__3.   Enter a Project Area Name.

__4.   Select the Essential SAFe 6.0 process template.

__5.   Save your changes.

__6.   Repeat the steps to create a separate project for each ART.

3.3.3 CREATE ASSOCIATIONS BETWEEN PROJECTS OF THE PORTFOLIO AND ART FLOW

__1.   Launch the EWM Application Administration page in your browser:
https://\<host>:\<port>/ccm/admin

__2.   Open the Project Areas that was created using the Full tenplate

__3.   Add the Uses and Provides association between this project and all projects of the ART

3.3.4 PREPARE THE PROJECT AREAS

__1.   Create teams, categories and add team members with the right roles to get started for each of the projects.

__2.   Archive the Solution Epic and Capability work item types

Congratulations! Your Portfolio SAFe 6.0 tooling environment is now ready for you to configure and get started!

3.4 Essential SAFe

__1.   Launch the Jazz Team Server (JTS) Application Administration page in your browser:
https://\<host>:\<port>/jts/lpa

__2.   Enter a Project Area Name (each application project area will have this name with a modifier for that application).

__3.   Select the Essential SAFe template from the Template drop down list:

__4.   Click Save to create your ELM LPA.

Congratulations! Your Essential SAFe 6.0 tooling environment is now ready for you to configure and get started!

4 Appendix: Create projects in individual applications for SAFe tooling environments

> **IMPORTANT**
>
> You must have imported the desired SAFe templates into each of the applications as described in Section 2. Deploy SAFe 6.0 Templates in your ELM environment before attempting to create a ELM LPA using those templates.

4.1 Create the EWM SAFe Project Area

__1. Launch the EWM Application Administration page in your browser:
https://<host>:<port>/ccm/admin
__2. Select Project Areas > Create > Project Area from the menu.
__3. Enter a Project Area Name.
__4. Select the SAFe 6.0 process template for Full or Essential SAFe.
__5. Save your changes.

4.2 Create the ETM SAFe Project Area

__1. Launch the ETM Application Administration page in your browser:
https://<host>:<port>/qm/admin
__2. Select Project Areas > Create > Project Area from the menu.
__3. Enter a Project Area Name.
__4. Select the SAFe 6.0 process template for Full or Essential SAFe.
__5. Save your changes.

4.3 Create the DOORS Next SAFe Project Area

__1. Launch DOORS Next in your browser: https://<host>:<port>/rm/web
__2. Select Create Project Area from the Administration drop-down list:
__3. Enter a Project Area Name.
__4. Click Next. Select the Use a template to initially populate the project checkbox and select the SAFe Full or Essential SAFe template from the list.
__5. Click Finish to create your project area.

IBM®