



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.

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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:

Process 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 21 - 25 of 25 Next			
Name	ID	Summary	Actions
Method Authoring	MethodAuthoring		
SAFe 6.0 Process (Essential SAFe)	safe60essential.process.ibm.com	A process template for Scaled Agile Framework (SAFe) 6.0 for the "Essential SAFe" configuration. SAFe is an established framework for applying lean and agile development practices on an enterprise scale.	
SAFe 6.0 Process (Full SAFe)	safe60full.process.ibm.com	A process template for Scaled Agile Framework (SAFe) 6.0 for the "Full SAFe" configuration. SAFe is an established framework for applying lean and agile development practices on an enterprise scale.	
Scrum/AgileALM (local practices)	ibm.aaim.localpractices.r3	The Scrum - Agile ALM process template supports managing Agile projects. This template accelerates your adoption of Scrum for Agile ALM using RTC by providing in-context process guidance and pre-defined Scrum project work items and artifacts.	
Systems Engineering 3.1	se_uc_m3_1	Main characteristics: SRS centric, KSF (Key System Functions - grouping operations based on a set of principles), executable models are built and validated through execution, presented in the context of a V-based lifecycle [version 3]	

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.

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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:

<div>Templates </div> <div>Manage templates here</div>											
<div> <div>Templates</div> <div> <div>Component Templates</div> <div>Artifact Templates</div> </div> </div> <div>Upload Template... New Template...</div>											
Name	Description	Artifacts	Artifact Te...	Module Te...	Attributes ...	Links	Link Types	Folder Stru...	Tags	Sh...	
SAFe 5.0 Essential Component Template	This template configures a DOORS Next component with artifact types, link types, artifact templates, folder structure and views consistent with the SAFe 5.0 methodology.	✓	✓	✓	✓	✓	✓	✓	✓	✓	
SAFe 6.0 Full Component Template	This template configures a DOORS Next component with artifact types, link types, artifact templates, folder structure and views consistent with the Full SAFe 6.0 methodology.	✓	✓	✓	✓	✓	✓	✓	✓	✓	
Systems Requirement Sample	A sample component containing requirements for the Automated Meter Reader.	✓	✓	✓	✓	✓	✓	✓	✓	✓	

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:

Projects	Members	Templates	Sample
configured to use the SAFe 5.0 Full, SAFe 5.0 Essential, Scrum, or Formal Project Management process template. The quality management project area can be configured to use the SAFe 5.0 Full, SAFe 5.0 Essential, or default process template. The requirements management project area can be configured to use the SAFe 5.0 Full, SAFe 5.0 Essential, Base, Use Case, Agile Requirements or Traditional Requirements project template.			
Architect, Analyst			This template sets up associated project areas for change and configuration management and requirements management. The change and configuration management project area is configured to support architecture management. The architects (in change and configuration management) work integrated with analysts (in requirements management). Artifacts in the change and configuration management project area elaborate requirements in the requirements project area. The requirements management project area can be configured to use the SAFe 5.0 Full, SAFe 5.0 Essential, Base, Use Case, Agile Requirements, or Traditional Requirements template. The change and configuration management project area can be configured to use the Scaled Agile Framework (SAFe) 5.0 Full, SAFe 5.0 Essential, Scrum, or Formal Project Management process template.
Architect, Developer			This template sets up a change and configuration management project area that is configured to support architecture management. The architects work integrated with development in the same project area. Architecture change requests are tracked in the project area. The change and configuration management project area can be configured to use the Scaled Agile Framework (SAFe) 5.0 Full, SAFe 5.0 Essential, Scrum, or Formal Project Management process template.
Architect, Developer, Product Engineer			This template sets up project areas for change and configuration management and product line engineering. The change and configuration management project area is configured to support architecture management. The change and configuration management project area can be configured to use the Scaled Agile Framework (SAFe) 5.0 Full, SAFe 5.0 Essential, Scrum, or Formal Project Management process template. The product line engineering project area uses the Product Management Default Process process template.
Architect, Product Engineer			This template sets up associated project areas for change and configuration management and product line engineering.
Architect			This template sets up a project area for architecture management.
Product Engineer			This template sets up a project area for product line engineering.
ELM for Automotive Compliance v1.0.2			This template sets up associated project areas for requirements management, change and configuration management, architecture management and quality management with preconfigured elements to support compliance with ASPICE and ISO 26262.
IBM ELM Solution			This template sets up associated project areas for quality management, requirements management, and change and configuration management. The testers (in quality management) and analysts (in requirements management) work integrated with development (in change and configuration management) and quality management tasks and requirements change requests are tracked in the change and configuration management project. The change and configuration management project area is configured to use the "IBM ELM Solution" process template. The requirements management project area is configured to use the Agile Requirements project template.
ELM for Automotive Compliance v1.0.3			This template sets up associated project areas for requirements management, change and configuration management, architecture management and quality management with preconfigured elements to support compliance with ASPICE, ISO 26262, and ISO/SAE 21434.
SAFe 6.0 configuration - 7.0.2			This template sets up a SAFe configuration, as described in SAFe 6.0, by creating associated project areas for quality management, requirements management, and change and configuration management. This template should be used with 7.0.2 or later. You can use the EWM Essential SAFe template to create additional project areas for additional ART and Teams and associate them manually into a Full SAFe Lifecycle Project Area.

Create Lifecycle Project from this Template

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:

All Lifecycle Projects / **My Full SAFe 6.0 Project** Save

Template: SAFe 6.0 configuration - 7.0.2
This template sets up a SAFe configuration, as described in SAFe 6.0, by creating associated project areas for quality management, requirements management, and change and configuration management. This template...
[Show More...](#)

Locale: English (United States)

Description:

Artifact Containers

Method	Artifact Containers	Process / Project Template	Actions
Create:	<input type="text" value="My Full SAFe 6.0 Project (Requirements)"/> project area in 'rm' for 'Requirements Management' <small>Provides Requirements to My Full SAFe 6.0 Project (Quality Management)</small>	SAFe 6.0 Full Component Template	Link to Existing...
Create:	<input type="text" value="My Full SAFe 6.0 Project (Change Management)"/> project area in 'lcm' for 'Architecture Management/Change and Configuration Management' <small>Provides Implementation Requests to My Full SAFe 6.0 Project (Requirements) Provides Defects to My Full SAFe 6.0 Project (Quality Management) Provides Quality Management Tasks to My Full SAFe 6.0 Project (Quality Management) Provides Requirements Change Requests to My Full SAFe 6.0 Project (Requirements)</small>	SAFe 6.0 Process (Full SAFe)	Link to Existing...
Create:	<input type="text" value="My Full SAFe 6.0 Project (Quality Management)"/> project area in 'lqm' for 'Quality Management'	Quality Management for Full SAFe 6.0	Link to Existing...

- __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 template
- __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:

All Lifecycle Projects /

My Large Solution SAFe 6.0 Project *

Save

Template: **SAFe 6.0 configuration - 7.0.2**
This template sets up a SAFe configuration, as described in SAFe 6.0, by creating associated project areas for quality management, requirements management, and change and configuration management. This template...
[Show More...](#)

Locale: **English (United States)**

Description:

Artifact Containers

Artifact Containers for Template (3)

Method	Artifact Containers	Process / Project Template	Actions
Create:	My Large Solution SAFe 6.0 Project (Requirements) project area in 'rm' for 'Requirements Management' Provides Requirements to My Large Solution SAFe 6.0 Project (Quality Management)	SAFe 6.0 Full Component Template	Link to Existing...
Create:	My Large Solution SAFe 6.0 Project (Change Management) project area in 'lcom' for 'Architecture Management/Change and Configuration Management' Provides Implementation Requests to My Large Solution SAFe 6.0 Project (Requirements) Provides Defects to My Large Solution SAFe 6.0 Project (Quality Management) Provides Quality Management Tasks to My Large Solution SAFe 6.0 Project (Quality Management) Provides Requirements Change Requests to My Large Solution SAFe 6.0 Project (Requirements)	SAFe 6.0 Process (Full SAFe)	Link to Existing...
Create:	My Large Solution SAFe 6.0 Project (Quality Management) project area in 'qm' for 'Quality Management'	Quality Management for Full SAFe 6.0	Link to Existing...

- __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 template
- __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:

All Lifecycle Projects /

My Portfolio SAFe 6.0 Project *

Save

Template: **SAFe 6.0 configuration - 7.0.2**
This template sets up a SAFe configuration, as described in SAFe 6.0, by creating associated project areas for quality management, requirements management, and change and configuration management. This template...
[Show More...](#)

Locale: **English (United States)**

Description:

Artifact Containers for Template (3)

Method	Artifact Containers	Process / Project Template	Actions
Create:	My Portfolio SAFe 6.0 Project (Requirements) project area in 'rm' for 'Requirements Management' Provides Requirements to My Portfolio SAFe 6.0 Project (Quality Management)	SAFe 6.0 Full Component Template	Link to Existing...
Create:	My Portfolio SAFe 6.0 Project (Change Management) project area in 'lcm' for 'Architecture Management/Change and Configuration Management' Provides Implementation Requests to My Portfolio SAFe 6.0 Project (Requirements) Provides Defects to My Portfolio SAFe 6.0 Project (Quality Management) Provides Quality Management Tasks to My Portfolio SAFe 6.0 Project (Quality Management) Provides Requirements Change Requests to My Portfolio SAFe 6.0 Project (Requirements)	SAFe 6.0 Process (Full SAFe)	Link to Existing...
Create:	My Portfolio SAFe 6.0 Project (Quality Management) project area in 'qm' for 'Quality Management'	Quality Management for Full SAFe 6.0	Link to Existing...

- __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 template
- __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:

All Lifecycle Projects /

My Essential SAFe 6.0 Project Save

Template: SAFe 6.0 configuration - 7.0.2
This template sets up a SAFe configuration, as described in SAFe 6.0, by creating associated project areas for quality management, requirements management, and change and configuration management. This template...
[Show More...](#)

Locale: English (United States)

Description:

Artifact Containers

Method	Artifact Containers	Process / Project Template	Actions
Create:	My Essential SAFe 6.0 Project (Requirements) project area in 'rm' for 'Requirements Management' Provides Requirements to My Essential SAFe 6.0 Project (Quality Management)	SAFe 6.0 Essential Component Template	Link to Existing...
Create:	My Essential SAFe 6.0 Project (Change Management) project area in 'lcm' for 'Architecture Management/Change and Configuration Management' Provides Implementation Requests to My Essential SAFe 6.0 Project (Requirements) Provides Defects to My Essential SAFe 6.0 Project (Quality Management) Provides Quality Management Tasks to My Essential SAFe 6.0 Project (Quality Management) Provides Requirements Change Requests to My Essential SAFe 6.0 Project (Requirements)	SAFe 6.0 Process (Essential SAFe)	Link to Existing...
Create:	My Essential SAFe 6.0 Project (Quality Management) project area in 'lqm' for 'Quality Management'	Quality Management for Essential SAFe 6.0	Link to Existing...

- __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.

