SAFe® Templates: Release Update Log

Last Update: April 30, 2023

Overview

The purpose of this document is to articulate the set of fixes and enhancements made to the SAFe product templates release-to-release, starting with the delivery of the SAFe 3.0 Program process template delivered in Rational Team Concert (RTC) 6.0. Since that release, the following templates have been delivered:

- SAFe 3.0 Portfolio templates in Collaborative Lifecycle Management (CLM) 6.0.1
- SAFe 4.0 templates in Collaborative Lifecycle Management (CLM) 6.0.3
- SAFe 4.5 templates in Collaborative Lifecycle Management (CLM) 6.0.6
- SAFe 4.6 templates in Engineering Lifecycle Management (ELM) 7.0
- *SAFe 5.0 templates in* Engineering Lifecycle Management (ELM) 7.0.1
- *SAFe 6.0 templates for* Engineering Lifecycle Management (ELM) 7.0.2

This is a living document that will be updated with each release of the templates.

Product Renaming (7.0)

As of 7.0, the products have been renamed:

- Collaborative Lifecycle Management → Engineering Lifecycle Management (ELM) base
- Rational Team Concert → Engineering Workflow Management (EWM)
- Rational DOORS Next Generation → Engineering DOORS Next Generation (DOORS Next)
- Rational Quality Manager → Engineering Test Management (ETM)

Summary

The delta updates build on top of the original SAFe 3.0 Program and Portfolio templates delivered in 6.0 and 6.0.1. Documentation is provided in the Configuring the SAFe® Methodology in ELM article if you are using an older version of the SAFe templates and would like to configure updates to move to a later version.

Release	Template	Product	Summary
6.0	Program	RTC	SAFe 3.0 Program template first released
6.0.1	Program	RTC	Work item updates Plan/Query updates Project Area updates Dashboard updates
	Portfolio	RTC	SAFe 3.0 Portfolio templates first released
		RQM	
		RDNG	
6.0.2	Program	RTC	Work item updates Query updates

	Portfolio	RTC	Work Item updates Plan/Query updates Project Area updates
		RDNG	Artifact updates
		CLM	SAFe CLM Lifecycle Project Area (LPA) template first released
6.0.3	Program	RTC	SAFe 4.0 templates first released
		RDNG	
		RQM	
		CLM	
	Portfolio	RTC	
		RDNG	
		RQM	
		CLM	
	All	All	SAFe 3.0 templates deprecated
6.0.4	Program	RTC	Work Item updates
	Portfolio	RTC	Work Item updates
		RDNG	Artifact updates
		RQM	Project area updates
6.0.5	Program	RTC	Work Item updates Plan updates Project Area updates
	Portfolio	RTC	Work Item updates Plan updates Project Area updates
6.0.6	Essential	RTC	SAFe 4.5 template first released
		RDNG	
		RQM	
	Portfolio	RTC	
		RDNG	
		RQM	
	Large Solution	RTC	
		RDNG	
		RQM	
	Full	RTC	
		RDNG	
		RQM	
6.0.6.1	Essential	RTC	Work Item updates Plan updates
	Full Portfolio Large Solution	RTC	Work Item updates Plan updates
7.0	SAFe 4.6 Essential	EWM (RTC)	SAFe 4.6 templates first released
		DOORS Next (RDNG)	
		ETM (RQM)	
	SAFe 4.6 Full	EWM (RTC)	

		DOORS Next (RDNG)	
		ETM (RQM)	
	SAFe 4.6 Full Lifecycle Project Area	ELM Base (CLM)	SAFe 4.6 Full LPA template first released
	SAFe 4.5 Essential	EWM (RTC)	Work item updates Plan updates
	SAFe 4.5 Full SAFe 4.5 Portfolio SAFe 4.5 Large Solution	EWM (RTC)	Work item updates Plan updates
	All	All	SAFe 4.0 templates deprecated
7.0.1			SAFe 5.0 templates first released
	SAFe 5.0 Essential	EWM (RTC)	
		DOORS Next (RDNG)	New Artifact type
		ETM (RQM)	
	SAFe 5.0 Full	EWM (RTC)	Workflow updates Enumeration updates
		DOORS Next (RDNG)	New Artifact types Artifact Template updates
		ETM (RQM)	
	SAFe 5.0 Full\Essential Lifecycle Project Area	ELM Base (CLM)	Quality Professional. Analyst, Developer Lifecycle template now uses SAFe 5.0 Full template as default.
	All	All	SAFe 4.5 templates deprecated
7.0.2			SAFe 6.0 templates first released on jazz.net
	SAFe 6.0 Essential	EWM (RTC)	Work Item Template updates Label updates (Work Items, Plan Views, Timelines, Roles)
		DOORS Next (RDNG)	Artifact types removed Artifact templates removed Label updates (attribute data types)
		ETM (RQM)	Label updates (custom attributes for test plan)
	SAFe 6.0 Full	EWM (RTC)	Work Item updates Plan updates Workflow updates Enumeration updates Work Item Template updates Label updates (Work Items, Plan Views, Timelines, Roles)
		DOORS Next (RDNG)	Artifact types removed Artifact templates removed Label updates (attribute data types)
		ETM (RQM)	Label updates (custom attributes for test plan)
	Lifecycle Project	ELM Base (CLM)	New SAFe 6.0 Lifecycle Project template

SAFe 3.0 (CLM V6.0.1)

RTC SAFe 3.0 Program Template Updates (6.0.1)

Work Item Updates

- Added **Type Description** hyperlink on all work item types to embed process guidance
- Enabled **Blocked** and **Reason** attributes to "soft block" a work item in Kanban and Taskboard plans

Task

- Fixed workflow state IDs that were duplicates of those for the *Defect* work item type

PI Objective

- **Achieved Value** attribute added along with a custom calculation *Achieved Value Provider*: `% achieved value = value (actual) / value (planned) * 100`

Risk

- *Exposure Provider* custom calculation added
- Added the **Occurrence Date** attribute to the work item editor
- Added workflow icon

Story

- Updated the *Story* workflow to allow transition from In Progress to Invalid
- Added icons for workflow actions

Feature

- Added **Acceptance Criteria** to the *Feature* work item type
- Updated the *Feature* workflow to allow transition from Invalid to New

Plan/Query Updates

- A new query was added to show the post-project initialization tasks: **Post-Project Initialization Tasks**
- Default WIP limits added to Kanban views
- Updated card configurations to include new attributes:
  a. Medium Card: Summary, Owned By, Planned For, WSJF, Contribute To link
  b. Large Card: Summary, Owned By, Planned For, WSJF, Contributes To link, WSJF components
- Created a new **Architectural Runway** play view

Project Area Updates

- Added **ART Iteration** type definition
- Updated permissions for Team Member and Product Owner:
  a. Team Member: Removed Delete Plan and Delete Plan Snapshot permissions
  b. Product Owner: Added Create/Delete Plan and Create/Delete Plan Snapshot permissions

Dashboard Updates

- The tab **Release Planning** was renamed to **Current Program Increment (PI) Progress** on the Program dashboard
- A new dashboard widget was added to the **Program Overview** tab on the dashboard that shows the *Post-Project Initialization* Task for easy access. The widget is titled **Post-Project Initialization Tasks**

SAFe 3.0 (CLM V6.0.2)

RTC SAFe 3.0 Program Template Updates (6.0.2)

Work Item Updates

- Provided **Priority** icons for use in the attribute enumeration
- Added Tracks/Contributes To links to the Quick Information section

PI Objective

- Added **Owned By** attribute to editor presentations

Program Epic & Feature

- Added the presentation for all WSJF-related components to the quick editor available in plan views

Query

- Added a new predefined query: **Incoming Work** (to show new unassigned Program Epics)

RTC SAFe 3.0 Portfolio Template Updates (6.0.2)

Work Item Updates

- Added Tracks/Contributes To links to the Quick Information section

Portfolio Epic

- New *Portfolio* work item template: **Portfolio Management**
- Added the presentation for WJSF-related components in the quick editor so that they are available in plans
- Added a **Default Value** provider to set the *Planned For* attribute to Backlog

Task

- Added a **Default Value** provider to set the *Planned For* attribute to Backlog
- Made the *Summary* attribute mandatory

Project Area Updates

- Updated Stakeholder permissions so this role can create Portfolio Epics

Plan/Query Updates

- Updated the **Portfolio Roadmap** plan view:
    a. Use Tracks/Contributes To instead of Parent/Child
    b. Added Filed Against column
- Added new predefined queries:
    a. **Incoming Ideas**: Shows new unassigned Portfolio Epics
    b. **Portfolio Epics Ready for Approval**: Shows Portfolio Epics in the Ready (for Approval) state
- Added Kanban plan view filter to show only Portfolio Epics

SAFe 4.0 (CLM V6.0.4)

RTC SAFe 4.0 Program Template Updates

Work Item Updates

Program Epic
- Fixed workflow so that Approved state is part of the Analysis state group

Story
- Standardized the story point **Complexity** attribute for consistency
- Added **MVP** Boolean attribute

Feature
- Added **MVP** Boolean attribute

Learning Milestone
- New work item type added to the template

PI Objective
- Added **Stretch Objective** Boolean attribute

RTC SAFe 4.0 Portfolio Template Updates

Work Item Updates

Value Stream Epic
- Fixed workflow so that Approved state is part of the Analysis state group

Capability
- Added **MVP** Boolean attribute

Learning Milestone
- New work item type added to the template

PI Objective
- Added **Stretch Objective** Boolean attribute

RDNG SAFe 4.0 Portfolio Template Updates

Artifact Updates
- Added **Type Description** hyperlink on all SAFe artifact types to embed process guidance

Value Stream & Program
- Defined initial values and updated the descriptions for **Capacity** and **Investment** attributes

RQM SAFe 4.0 Portfolio Template Updates

Project Area Updates

- Added **Test Administrator** role

SAFe 4.0 (CLM V6.0.5)

RTC SAFe 4.0 Program Template Updates

Work Item Updates

Story

- Fixed the **Story Points (numeric)** calculation to match the updated **Complexity** enumeration updated in 6.0.4

PI Objective

- Made the **Achieved Value (%)** attribute read only

Plan Updates

- Added **Planned For** attribute in Roadmap and WSJF Ranked List plan views

Project Area Updates

- Made *Learning Milestone* and *PI Objective* plan items

RTC SAFe 4.0 Portfolio Template Updates

Work Item Updates

PI Objective

- Made the **Achieved Value (%)** attribute read only

Plan Updates

- Added **Planned For** attribute in Roadmap and WSJF Ranked List plan views
- Changed Contributes To to Tracks in the Portfolio Roadmap plan view

Project Area Updates

- Made *Capability, Value Stream Epic, Learning Milestone* and *PI Objective* plan items

SAFe 4.5 (CLM V6.0.6.1)

RTC SAFe 4.5 Essential Template Updates

Work Item Updates

Enumerations

- Renamed the **PI Objective Type** to **Scope**

PI Objective

- Rename the **PI Objective Type** attribute to **Scope**

Risk

- Added a new **Scope** attribute of type **Scope** enumeration
- Updated the editors with the new **Scope** attribute

Program Epic

- Updated the workflow:
    a. Added a transition from Analyzing to Reviewing
    b. Added a transition from Ready (for Approval) to Reviewing

Feature

- Updated the workflow:
    a. Added a transition from Validating on Staging to Accepted
    b. Added a transition from Approved to Analyzing
    c. Added a transition from Accepted to Rejected

Plan Updates

- Added **Scope, Risk Category, Probability, Impact, Exposure (%)** and **Occurrence Date** as plan attributes
- Added **Scope** as a grouping attribute
- Remove the **PI Objective Type** as a plan attribute

RTC SAFe 4.5 Portfolio Template Updates

These updates apply to all SAFe 4.5 Portfolio-level templates in RTC: Full, Portfolio, Large Solution

Work Item Updates

Enumerations

- Renamed the **PI Objective Type** to **Scope**

PI Objective

- Rename the **PI Objective Type** attribute to **Scope**

Risk

- Added a new **Scope** attribute of type **Scope** enumeration
- Updated the editors with the new **Scope** attribute

Solution Epic
- Updated the workflow:
    a. Added a transition from Analyzing to Reviewing
    b. Added a transition from Ready (for Approval) to Reviewing

Capability
- Updated the workflow:
    a. Added a transition from Approved to Analyzing
    b. Added a transition from Accepted to Rejected

Plan Updates
- Added **Scope, Risk Category, Probability, Impact, Exposure (%)** and **Occurrence Date** as plan attributes
- Added **Scope** as a grouping attribute
- Remove the **PI Objective Type** as a plan attribute

SAFe 4.6 (ELM V7.0)

EWM SAFe 4.6 Essential Template Updates

Work Item Updates

Updated the WSJF calculation to reflect change from 20 to 21 in Fibonacci enumeration for components

Enumerations

- Added a **Milestone Type** enumeration: PI Milestone, Fixed-Date Milestone, Learning Milestone
- Updated the WJSF component enumerations to be *true* Fibonacci (changed 20 to 21)

Learning Milestone

- Renamed to *Milestone*
- Added the **Milestone Type** attribute of type Milestone Type enumeration
- Updated editors with the new attribute

Risk

- Added a Risk ROAM state group
- Updated workflow to include Resolved, Owned, Accepted and Mitigated states in Risk ROAM state group
- Updated workflow transitions to move from New into Risk ROAMing states and then into Closed with dispositions that include the ROAM status on closure

Plan Updates

- Added **Milestone Type** as a plan attribute
- Added **Milestone Type** as a grouping attribute
- Remove the **PI Objective Type** as a plan attribute

EWM SAFe 4.6 Full Template Updates

Work Item Updates

Updated the WSJF calculation to reflect change from 20 to 21 in Fibonacci enumeration for components

Enumerations

- Added a **Milestone Type** enumeration: PI Milestone, Fixed-Date Milestone, Learning Milestone
- Updated the WJSF component enumerations to be *true* Fibonacci (changed 20 to 21)

Learning Milestone

- Renamed to *Milestone*
- Added the **Milestone Type** attribute of type Milestone Type enumeration
- Updated editors with the new attribute

Risk

- Added a Risk ROAM state group
- Updated workflow to include Resolved, Owned, Accepted and Mitigated states in Risk ROAM state group

- Updated workflow transitions to move from New into Risk ROAMing states and then into Closed with dispositions that include the ROAM status on closure

Plan Updates

- Added **Milestone Type** as a plan attribute
- Added **Milestone Type** as a grouping attribute
- Remove the **PI Objective Type** as a plan attribute

DOORS Next SAFe 4.6 Full Template Updates

New Artifact Types

- Added a new **Portfolio Canvas** artifact type.
- Added a new **Value Stream Canvas** artifact type.

SAFe 5.0 (ELM V7.0.1)

EWM SAFe 5.0 Full Template Updates

Workflow Updates

- Updated **Portfolio Epic workflow** to include MVP and Persevering states to the Implementation state group.

Work Item Updates

- Updated the **Scope enumeration** for additional value Portfolio.

DOORS Next SAFe 5.0 Essential Template Updates

Artifact Updates

- Added new **Solution Context artifact type**.
- Added new **Scope attribute** to the Vision artifact type.

DOORS Next SAFe 5.0 Full Template Updates

Artifact Updates

- Added new **SWOT Analysis** artifact type.
- Added new **TOWS Strategic Options Matrix** artifact type.
- Updated **artifact template for Strategic Theme** artifact type.
- Added new **Scope attribute** to the Vision artifact type.

SAFe 6.0 (ELM V7.0.2)

EWM SAFe 6.0 Full Template Updates

Work Item Updates

Enumerations

- Added an **Objective Type** enumeration: Strategic, Tactical

Work Item Types

- Added new Work Item Types
  a. **Strategic Theme**: Value to Customer, Impact on Business, Impact on Competition
  b. **Organization**: Scope, Allocated Capacity, Allocated Investment, Budgeted Capacity, Budgeted Capacity, Total Market Opportunity
  c. **Objective:** Scope, Objective Type, Proposed
  d. **Key Results:** Scope, Business Value (planned), Business Value (Actual), Achieved Value (%)

Workflow Updates

- Updated **Retrospective workflow** to include Reviewed state to the Implementation state group.

Plan/Query Updates

- Added new **Portfolio Management** plan type with the following views:
  a. Strategic Themes to show only Strategic Themes and its impact
  b. Organization to show only Organization hierarchy along with budget details
  c. Objective – Key Results to show Objectives and its alignment to Strategic Themes
  d. OKR Board to show Objective and child Key Results

Terminology Changes

Updates are made to reflect the following terminology changes recommended by SAFe 6.0:
  e. Solution to **Solution Train**
  f. Program to **ART**
  g. Program Increment to **Planning Interval**

The following artifacts were updated:

- Scope enumeration
- Plan type and views names
- Work item templates
- Role names and permissions

Project Area Updates

- Updated permissions for role to create/update Business Entity, Strategic Theme, Objectives and Key Results
- Updated properties to create a Portfolio Management plan during Project Initialization

EWM SAFe 6.0 Essential Template Updates

Workflow Updates

- Updated **Retrospective workflow** to include Reviewed state to the Implementation state group.
- Updated **Feature workflow** to remove 'Verifying on Staging' state. [Defect Fix]

DOORS Next Artifact and Artifact Templates

- Remove Program artifact type, attributes unique to it and associated artifact template

Terminology Changes

Updates are made to reflect the following terminology changes recommended by SAFe 6.0:

    a. Program to **ART**
    b. Program Increment to **Planning Interval**

The following artifacts were updated:

- Scope enumeration
- Plan type and view names
- Work item templates
- Role names and permissions

DOORS Next SAFe 6.0 Full Template Updates

Artifact Updates

- Removed [**SAFe] Program** artifact type.
- Removed [**SAFe] Strategic Theme** artifact type.
- Removed [**SAFe] Value Stream** artifact type.
- Removed **Allocated Capacity** attribute type.
- Removed **Allocated Investment** attribute type.
- Removed **Budgeted Capacity** attribute type.
- Removed **Budgeted Capacity** attribute type.
- Removed **Total Market Opportunity** attribute type.

Artifact Template Updates

- Removed [**SAFe] Program** template.
- Removed [**SAFe] Strategic Theme** template.
- Removed [**SAFe] Value Stream** template.
- Updates are made to values of the **Scope enumeration** reflect the following terminology changes recommended by SAFe 6.0:
  - a. Solution to **Solution Train**
  - b. Program to **ART**

DOORS Next SAFe 6.0 Essential Template Updates

Artifact Updates

- Removed [**SAFe] Program** artifact type.
- Removed **Allocated Capacity** attribute type.
- Removed **Allocated Investment** attribute type.
- Removed **Budgeted Capacity** attribute type.
- Removed **Budgeted Capacity** attribute type.
- Removed **Total Market Opportunity** attribute type.

Artifact Template Updates

- Removed [**SAFe] Program** template.
- Removed [**SAFe] Strategic Theme** template.
- Removed [**SAFe] Value Stream** template.
- Updates are made to values of the **Scope enumeration** reflect the terminology changes recommended by SAFe 6.0:
    a. Program to **ART**

ETM SAFe 6.0 Full Template Updates

Artifact Category Updates

- Renamed **Program** to **ART** in Test Plan Category and its values.
- Renamed value **SAFe Program** to **SAFe ART** in Test Plan Category SAFe Level.

Artifact Template Updates

- Renamed **SAFe Program Test Plan Template** to **SAFe ART Test Plan Template**.

ETM SAFe 6.0 Essential Template Updates

Artifact Category Updates

- Renamed **Program** to **ART** in Test Plan Category and its values.
- Renamed value **SAFe Program** to **SAFe ART** in Test Plan Category SAFe Level.

Artifact Template Updates

- Renamed **SAFe Program Test Plan Template** to **SAFe ART Test Plan Template**.