

CONFIGURING SAFE® 5.0 IN THE IBM ENGINEERING LIFECYCLE MANAGEMENT (ELM) SOLUTION

Abstract

In this document, we provide step-by-step guidance to configure support for the SAFE 5.0 methodology in ELM tooling, building on an environment configured for SAFE 4.6.

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CONFIGURING

IBM ENGINEERING LIFECYCLE MANAGEMENT (ELM)

FOR SAFe® 5.0

Note: This document includes new solution and application names. Please review this [jazz.net blog post](#) to understand the mapping between old and new names.

Introduction

Complete end-to-end support for SAFe 4.6 was delivered in version 7.0 of the IBM Engineering Lifecycle Management (ELM) solution in April 2020.

In January 2020, Scaled Agile Inc. announced SAFe 5.0. This document describes how to configure an ELM tooling environment based on the SAFe 4.6 templates to support SAFe 5.0.

You may use this document to update existing project areas based on SAFe 4.6 templates.

If you are interested in doing these kinds of configurations but you are not starting from a SAFe 4.6-based environment, consult documentation provided in the [Configuring the SAFe® Methodology in ELM](#) article to access additional configuration guidelines as necessary to bring your environment up to the correct level.

To learn more about what's new in ELM SAFe support, refer to the **What's New** presentations available here: [Agile@Scale Overview Series](#).

What's New in SAFe 5.0?

The template changes covered in this document primarily impact IBM Engineering Requirements Management (DOORS NEXT) and IBM Engineering Workflow Management (EWM). Beyond new templates with the SAFe 5.0 name, There are no content changes in IBM Engineering Test Management (ETM) templates. Each application's template updates are covered in a separate section, so you can easily find what you need for your environment.

Summary of Key Changes

I. EWM Changes

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

ii. DOORS NEXT Changes

- New SWOT artifact type
- New TOWS artifact type
- Updated Strategic Theme artifact template
- Updated Vision artifact type

Define External URIs

It is important to define RDF URIs for attributes, types, link types, and enumeration values defined in your project areas and components, especially where these are shared or common. URIs were added to the out of the box templates in SAFe 4.6 templates. It is strongly advised that if your existing project does not have RDF URIs defined, pl. refer to the [IBM Enterprise Scaled Agile Vocabulary](#) and add them.

To learn more, refer to the [best practices of defining external URIs](#) for artifact types and attributes, you can equate attributes across project areas to facilitate cross-project reporting.

ASSUMPTIONS

The steps in this document assume that:

- You have *existing* **SAFe 4.6** project areas configured in one of three ways:
 - a. Using the templates delivered in the 7.0 or later release of ELM
 - b. Configured by hand using the guidelines documentation referenced above
- You have Administrative authority and experience configuring process/project templates.

Note: *If you have already customized some of the constructs delivered out of the box with the SAFe templates, some of the instructions and/or screen captures may not match your environment.*

1 EWM SAFE® 5.0 CONFIGURATIONS

1.1 SAFE® FULL OR PORTFOLIO CHANGES

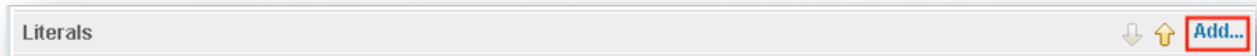
The remainder of the Full or Portfolio level updates will be done in the Eclipse client.

- __1. Launch the EWM Administration Page in your browser and log on as an Administrator and navigate to your existing SAFe 4.6-based project area.
- __2. Right-click on the Repository Connection, choose Managed Connected Project Areas and select your project area to connect to it.
- __3. Right-click to open your project area for editing.

1.1.1 UPDATE SCOPE TYPE ENUMERATION

NOTE: Complete the steps below, only for Full or Portfolio SAFe.

- __1. Launch the EWM Administration Page in your browser, log on as an Administrator and navigate to your existing SAFe 4.6-based project area.
- __2. In the Browser user interface, select **Work Items** in the left navigation bar, then select **Enumerations**.
- __3. Select the enumeration **Scope**.
- __4. Scroll to the **Literals section** and click the **Add... button** to create the new literal value.

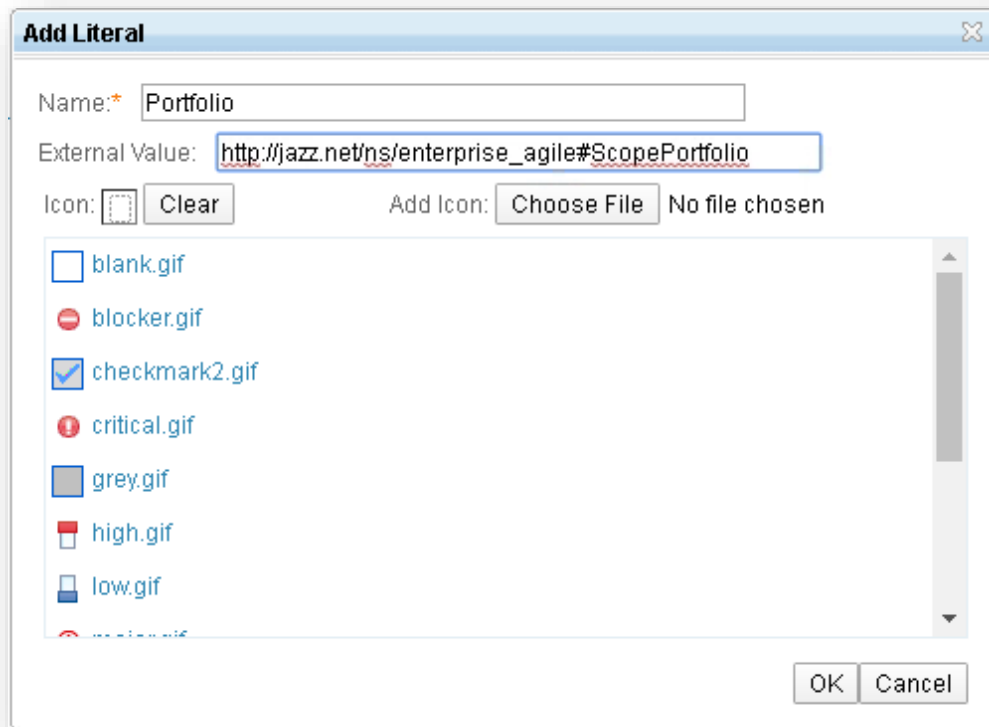


- __5. Specify the following details:

Name: Portfolio

External Value:

`http://jazz.net/ns/enterprise_agile#ScopePortfolio`



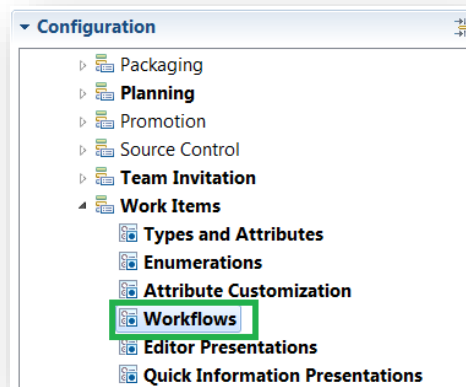
__6. Reorder the literal values to match below:

Literals			
Icon	Name	External Value	Actions
	Portfolio	http://jazz.net/ns/enterprise_agile#ScopePortfolio	
	Solution	http://jazz.net/ns/enterprise_agile#ScopeSolution	
	Program	http://jazz.net/ns/enterprise_agile#ScopeProgram	
	Team	http://jazz.net/ns/enterprise_agile#ScopeTeam	

__7. Click the **Save** button in the top right corner of the browser window to save your changes.

1.1.2 PORTFOLIO EPIC WORKFLOW

__1. Navigate to *Project Configuration > Configuration Data > Work Items > Workflows* in the **Configuration** box on the left:



- __2. Scroll up to the **Choose the Workflow to Edit:** selection list. Select the *Portfolio Epic Workflow*.
- __3. Scroll to **States** section.
- __4. Click the **Add...** button to add the following states:

__a. *MVP:*

External URI: `http://jazz.net/ns/enterprise_agile #StateMVP`

Group: Implementation

__b. *Persevering:*

External URI: `http://jazz.net/ns/enterprise_agile #StatePersevering`

Group: Implementation

Add icons if you wish.

The screenshot shows the 'States' configuration table in Jira. The table has columns for Name, External URI, Group, Show resolution, and Description. The 'Persevering' state is highlighted in blue.

Name	External URI	Group	Show resolution	Description
Rejected	<code>http://jazz.net/ns/sse#StateReject...</code>	✓ Closed	<input type="checkbox"/>	
Draft	<code>http://jazz.net/ns/sse#StateDraft</code>	Funnel	<input type="checkbox"/>	
Approved	<code>http://open-services.net/ns/cm#...</code>	Backlog	<input type="checkbox"/>	
Analyzing	<code>http://jazz.net/ns/sse#StateAnaly...</code>	Analysis	<input type="checkbox"/>	
Implementing	<code>http://jazz.net/ns/sse#StateImple...</code>	Implement...	<input type="checkbox"/>	
Reviewing	<code>http://jazz.net/ns/sse#StateRevie...</code>	Review	<input type="checkbox"/>	
Accepted	<code>http://jazz.net/ns/sse#StateAccep...</code>	✓ Done	<input type="checkbox"/>	
Ready (for Approval)	<code>http://jazz.net/ns/sse#StateReady...</code>	Analysis	<input type="checkbox"/>	
MVP	<code>http://jazz.net/ns/sse#StateMVP</code>	Implement...	<input type="checkbox"/>	Category for Portfolio Epic activity ind...
Persevering	<code>http://jazz.net/ns/sse#StatePerse...</code>	Implement...	<input type="checkbox"/>	Category for Portfolio Epic activity ind...

- __5. Click the **Add...** button to add the following actions:

__a. *MVP:*

Target State: MVP

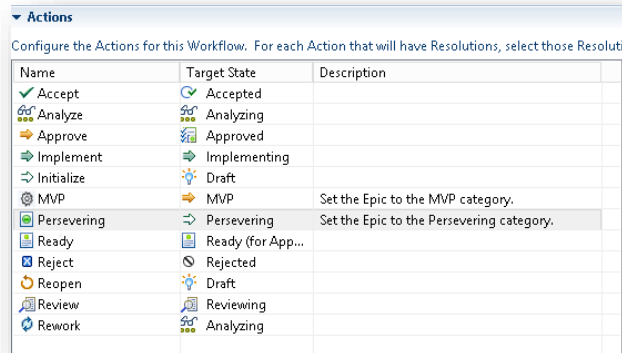
Description: Set the Epic to the MVP category.

__b. *Persevering:*

Target State: Persevering

Description: Set the Epic to the Persevering category.

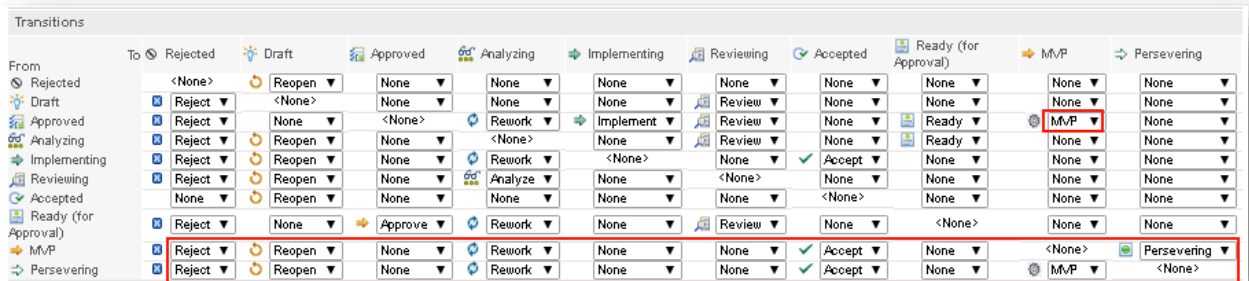
Add icons if you wish. Your actions should look similar to this:



Name	Target State	Description
Accept	Accepted	
Analyze	Analyzing	
Approve	Approved	
Implement	Implementing	
Initialize	Draft	
MVP	MVP	Set the Epic to the MVP category.
Persevering	Persevering	Set the Epic to the Persevering category.
Ready	Ready (for App...)	
Reject	Rejected	
Reopen	Draft	
Review	Reviewing	
Rework	Analyzing	

__6. Scroll up to the **Transitions** section.

__7. Set transitions to look like this:



From	To	Rejected	Draft	Approved	Analyzing	Implementing	Reviewing	Accepted	Ready (for Approval)	MVP	Persevering
Rejected	<None>	Reopen	None	None	None	None	None	None	None	None	None
Draft	Reject	<None>	None	None	None	None	None	None	None	None	None
Approved	Reject	None	<None>	None	None	None	None	None	None	None	None
Analyzing	Reject	Reopen	None	None	None	None	None	None	None	None	None
Implementing	Reject	Reopen	None	None	None	None	None	None	None	None	None
Reviewing	Reject	Reopen	None	None	None	None	None	None	None	None	None
Accepted	Reject	Reopen	None	None	None	None	None	None	None	None	None
Ready (for Approval)	Reject	Reopen	None	None	None	None	None	None	None	None	None
MVP	Reject	Reopen	None	None	None	None	None	None	None	None	None
Persevering	Reject	Reopen	None	None	None	None	None	None	None	None	None

__8. Save the changes.

Congratulations! You've made the common updates for all SAFe configurations. There are no additional changes required for Large Solution and Essential SAFe configuration. *You can now proceed to make the changes for [SAFe 5.0 to your DOORS NEXT configuration.](#)*

2 DOORS NEXT SAFE 5.0 CONFIGURATIONS

2.1 ALL SAFE 5.0 LEVEL CHANGES

In this section, you configure your existing SAFe 4.6-based DOORS Next project area(s) to support SAFe 5.0.

The following changes apply to the all SAFe level:

- Create artifact template for **Role**

Instructions

- ___1. Launch DOORS Next in your browser.
- ___2. Navigate to the your SAFe 4.6 portfolio-level project area to be updated.

2.1.1 ADD TEMPLATE FOR ROLE ARTIFACT TYPE

- ___1. Select **Artifacts** from the menu bar and then *Create > Role*:
- ___2. Specify these details:

The screenshot shows the 'Create Artifact' dialog box. The 'Name' field is filled with 'Role Template'. The 'Artifact type' is 'Role (Describes a role that performs activities within th...' and the 'Artifact format' is 'Text'. The 'Template' is set to 'None'. The 'Folder' is 'Artifact Templates'. The 'Open artifact' checkbox is checked. The 'OK' and 'Cancel' buttons are at the bottom right.

- ___3. Click **OK** to edit the new artifact.
- ___4. Select the following text and **copy-paste** it into the new artifact:

[Click to view Type Description](#)

[Name of the Role]

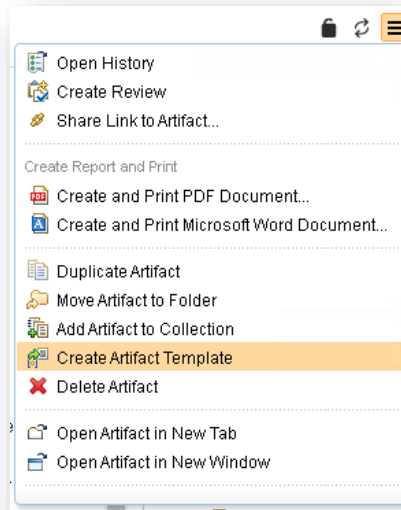
<Description of user role>

Sample Persona

<The purpose of personas is to create reliable and realistic representations of the user role>

<Picture>	Name: <Persona Name>
	Job Title:
	Key Scenarios:
Description: 1. 2. 3. 4. 5.	
Responsibilities: 1. 2. 3. 4. 5.	
Pain Points: 1. 2. 3. 4. 5.	

- __5. Click **Save** and then **Done**.
- __6. Click on '**More Actions**' menu.
- __7. Select **Create Artifact Templates**.



__8. Specify the following details:

Name: Role Template

Description: Template used to create Role and a sample Persona.

__4. Click on **Create**.

__5. Click on **Close** to complete the process.

Congratulations! You've made the common updates for all SAFe configurations. Now, proceed to the [section 2.2 to make change to your Full, Large Solution or Portfolio SAFe configuration](#) or else proceed to [section 2.3 to make change to your Essential SAFe configuration](#).

2.2 SAFE 5.0 FULL, LARGE SOLUTION OR PORTFOLIO CHANGES

In this section, you configure your existing Full, Large Solution or Portfolio SAFe 4.6-based DOORS Next project area(s) to support SAFe 5.0.

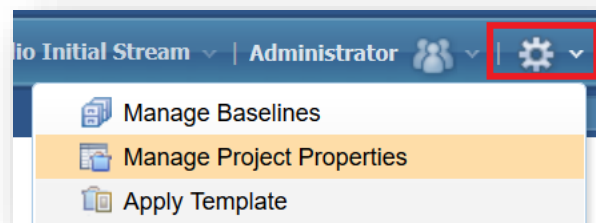
The following changes apply to the Portfolio level:

- Add additional attribute '**Scope**' to the **Vision** artifact type
- Add a new **SWOT** artifact and associated template
- Add a new **TOWS** artifact and associated template
- Update artifact template for **Strategic Theme**

2.2.1 ADD 'SCOPE' ATTRIBUTE TO EXISTING VISION ARTIFACT TYPE

2.2.1.1 CREATE SCOPE ARTIFACT ATTRIBUTE

__1. Select *Manage Project Properties* from the **Administration** drop-down menu:



__2. Create new Scope attribute type:

__a. Select **Attribute Data Types** and then click **+ New Data Type...** to create a new attribute type.

__b. Enter the following details:

Name: Scope

Description: Extent or boundaries of organization to which the document is applies.

Kind of value: Enumerated list of values

URI: http://jazz.net/ns/enterprise_agile#Scope

__c. Add the following values:

Portfolio

http://jazz.net/ns/enterprise_agile#ScopePortfolio

Solution

http://jazz.net/ns/enterprise_agile#ScopeSolution

Program

`http://jazz.net/ns/enterprise_agile#ScopeProgram`

Team

`http://jazz.net/ns/enterprise_agile#ScopeTeam`

__d. The form should look like:

The screenshot shows a configuration form for an artifact attribute named 'Scope'. The form includes fields for Name, Description, Kind of Value, Base Data Type, and URI. The 'Values' section contains a table with three rows: 0 (Portfolio), 1 (Solution), and 2 (Program). The form also includes buttons for 'Add Value' and 'Add Multiple Values...'. Below the table, there is a note: 'Click on the value, label, or RDF URI text to edit.'

Value	Label	RDF URI
0	Portfolio	<code>http://jazz.net/ns/enterprise_agile#ScopePortfolio</code>
1	Solution	<code>http://jazz.net/ns/enterprise_agile#ScopeSolution</code>
2	Program	<code>http://jazz.net/ns/enterprise_agile#ScopeProgram</code>

__e. Click **Save**.

__3. Create new **Scope** artifact attribute:

__a. Select **Artifact Attributes** and then click **+ New Attribute...** to create a new artifact attribute.

__b. Enter the following details:

Name: Scope

Description: This attribute defines the extent or boundaries of organization to which the document is applies.

Data Type Scope

Initial Value Portfolio

URI: http://jazz.net/ns/enterprise_agile#scope

__c. The form should look like:

Name: *

Description:

Data Type: *

Number of Values: * ☒ One value allowed ☐ Multiple values allowed

Initial Value:

The initial value is assigned to an attribute when an artifact is created

URI:

You can assign a custom URI to predicates and resources that are used in linked data representations
Example: https://example.com/ns/rm#status

__d. Click **Save**.

2.2.1.2 ADD SCOPE ATTRIBUTE TO VISION ARTIFACT TYPE

- __1. Select **Artifact Types**
- __2. Select **[SAFe] Vision**
- __3. Click **Add Attribute**
- __4. Select the attribute **Scope**, created in the previous section, from the list

Add Attribute

Select the attribute to add to the artifact type: [New Attribute...](#)

<input type="checkbox"/>	Name	Data Type	Description
<input type="checkbox"/>	Stability	Rating scale (High/Medium/Low)	High, medium or Low
<input checked="" type="checkbox"/>	Scope	Scope	This attribute defines the extent or boundaries of organization to which the document is applies.
<input type="checkbox"/>	Stability	Rating scale (High/Medium/Low)	High, Medium or Low
<input type="checkbox"/>	Start Date	Date	The data this Epic is expected to begin implementation.
<input type="checkbox"/>	Total Market Opportunity	Integer	Total market size in monetary units (e.g. millions of dollars). This applies to the Value Stream artifact.

OK **Cancel**

- __5. Click **OK**
- __6. The attribute list for the artifact type [SAFe] Vision should look like:

Artifact Attributes				Remove Attribute... Add Attribute...
Name	Data Type	Description		
Owner	User	Owner or responsible party for the artifact or action.		
Status	Status Values	Status or state of the artifact.		
Scope	Scope	This attribute defines the extent or boundaries of organization to which the document is applies.		

__7. Click **Save**.

2.2.2 ADD NEW ARTIFACT AND ATTRIBUTE TYPES

2.2.2.1 SWOT ARTIFACT TYPE

__1. Click **New Type...** to create a new artifact type:

Artifact Types

An artifact type is a definition for a group of objects that share a common type, and a use case artifact type. Use this page to define

Artifact Types
New Type..

__2. Specify these details:

Name: [SAFe] SWOT Analysis

Icon: Goal Modeling


Description: The SWOT analysis is for identifying the strengths, weaknesses, opportunities, and threats related to the current business situation.

Default artifact format: Text

Preferred link types: Informs >


URI: http://jazz.net/ns/enterprise_agile#SAFeSWOTAnalysis


Name: * [SAFE] SWOT Analysis

Icon:  [Change...](#)

Description: The SWOT analysis is for identifying the strengths, weaknesses, opportunities, and threats related to the

Default artifact format: * Text

Workflow: 

Preferred link types: Informs  [Choose...](#) [Copy from...](#)



Artifact roles:

- ☐ Make this artifact type a preferred artifact type
- ☐ Use artifacts of this type as glossary terms
- ☐ In modules, display artifacts of this type as headings by default
- ☐ Make this artifact type a preferred upload option

URI: [http://jazz.net/ns/enterprise_agile#SAFE\\$SWOTAnalysis](http://jazz.net/ns/enterprise_agile#SAFE$SWOTAnalysis)

You can assign a custom URI to predicates and resources that are used in linked data representations
Example: <https://hostname/domain/myLabel>


__3. Add the **Owner**, **Scope** and **Status** attributes to the artifact type.

Artifact Attributes			  Remove Attribute... Add Attribute...
Name	Data Type	Description	
Owner	User	Owner or responsible party for the artifact or action.	
Status	Status Values	Status or state of the artifact.	
Scope	Scope	This attribute defines the extent or boundaries of organization to which the document is applies.	

__4. Click **Save**.

2.2.2.2 TOWS ARTIFACT TYPE

__1. Click [+ New Type...](#) to create a new artifact type:


Artifact Types 

An artifact type is a definition for a group of objects that share a common type, and a use case artifact type. Use this page to define

Artifact Types [+ New Type..](#)

__2. Specify these details:

Name: [SAFe] TOWS Matrix

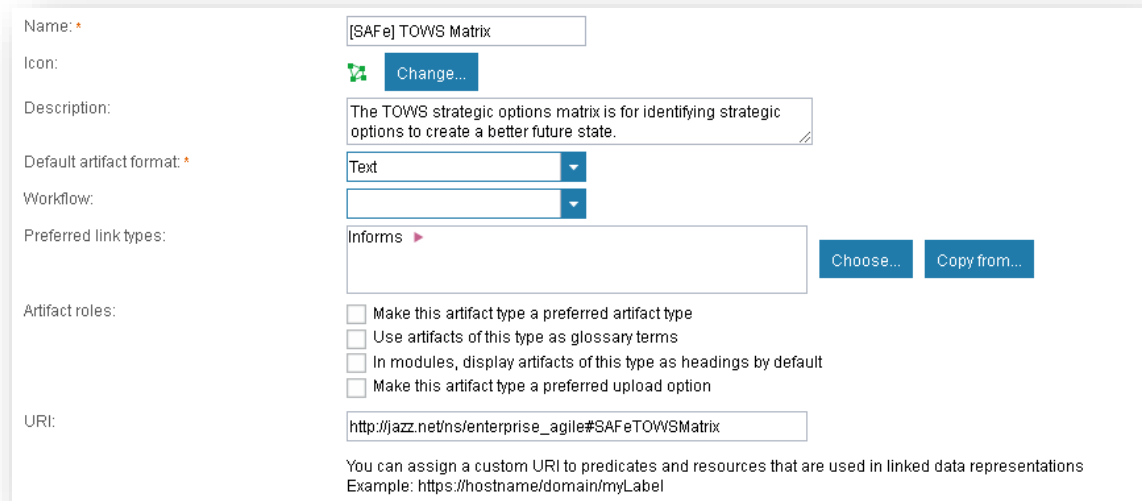
Icon:  Green Diagram

Description: The TOWS strategic options matrix is for identifying strategic options to create a better future state.






Default artifact format: Text

Preferred link types: Informs >

URI: http://jazz.net/ns/enterprise_agile#SAFeTOWSMatrix



__3. Add the **Owner**, **Scope** and **Status** attributes to the artifact type.

Artifact Attributes			    Remove Attribute...	 Add Attribute...
Name	Data Type	Description		
Owner	User	Owner or responsible party for the artifact or action.		
Status	Status Values	Status or state of the artifact.		
Scope	Scope	This attribute defines the extent or boundaries of organization to which the document is applies.		

__4. Click **Save**.

2.2.3 CREATE NEW ARTIFACT TEMPLATES

2.2.3.1 SWOT ANALYSIS ARTIFACT TEMPLATE

- __1. Select **Artifacts** from the menu bar and then *Create > [SAFe] SWOT Analysis Template*.
- __2. Specify these details:

Create Artifact

Initial content:

Name:
The name can be automatically created based on the content, or you can type one.

Type

Artifact type: *

Artifact format: *

Populate Artifact Values

Template:
You can populate the artifact with information from an artifact template.

Location

Folder:

Tags:

☒ Open artifact

- __3. Click **OK** to edit the new artifact.
- __4. Select the following text and **copy-paste** it into the new artifact:

[Click to view Type Description](#)

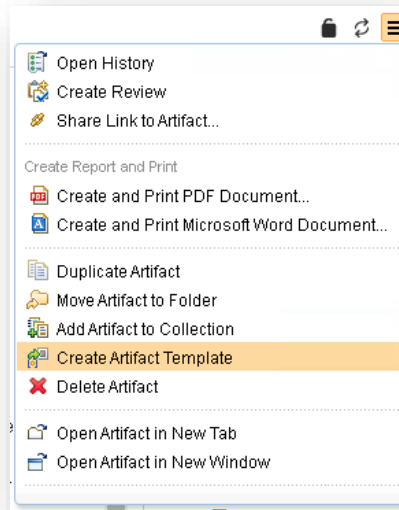
[Portfolio/Value Stream Name] SWOT Analysis

< The SWOT analysis is used to identify the strengths, weaknesses, opportunities, and

threats related to the current business situation. A SWOT analysis is a great way to uncover the current situation of your value stream, product, or a portfolio. The information from the SWOT analysis below is used to fill-in the strengths, weaknesses, opportunities, and threats of the TOWS strategic options matrix. >

Internal Origin	<p style="text-align: center;">STRENGTHS</p> <p>6. Strength 1 7. Strength 2 8. Strength 3 9. Strength 4 10. Strength 5</p>	<p style="text-align: center;">WEAKNESSES</p> <p>6. Weakness 1 7. Weakness 2 8. Weakness 3 9. Weakness 4 10. Weakness 5</p>
External Origin	<p style="text-align: center;">OPPORTUNITIES</p> <p>6. Opportunity 1 7. Opportunity 2 8. Opportunity 3 9. Opportunity 4 10. Opportunity 5</p>	<p style="text-align: center;">THREATS</p> <p>1. Threat 1 2. Threat 2 3. Threat 3 4. Threat 4 5. Threat 5</p>

- __5. Click **Save** and then **Done**.
- __6. Click on '**More Actions**' menu.
- __7. Select **Create Artifact Templates**.



__8. Specify the following details:

Name: [SAFe] SWOT Analysis Template

Description: Template used to create SWOT Analysis artifact for a SAFe Portfolio or Value Stream Canvas.

__9. Click on **Create**.

__10. Click on **Close** to complete the process.

2.2.3.2 TOWS STRATEGIC OPTIONS MATRIX ARTIFACT TEMPLATE

- __1. Select **Artifacts** from the menu bar and then *Create > [SAFe] TOWS Strategic Options Matrix Template*.
- __2. Specify these details:

Create Artifact

Initial content:

Name:
The name can be automatically created based on the content, or you can type one.

Type

Artifact type: *

Artifact format: *

Populate Artifact Values

Template:
You can populate the artifact with information from an artifact template.

Location

Folder:

Tags:

☒ Open artifact

- __3. Click **OK** to edit the new artifact.
- __4. Select the following text and **copy-paste** it into the new artifact:

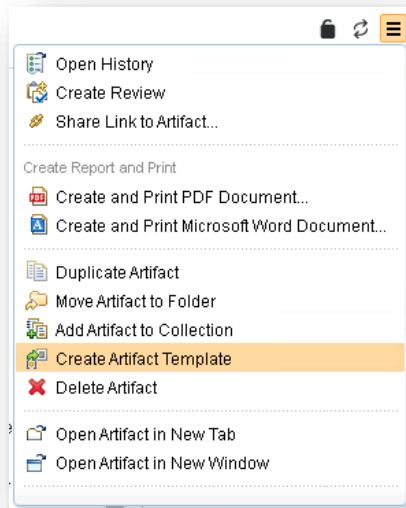
[Click to view Type Description](#)

[Portfolio/Value Stream Name] TOWS Strategic Options Matrix

< The TOWS strategic options matrix is for identifying strategic options to create a better future state. The information from the SWOT analysis is used to fill-in the strengths, weaknesses, opportunities, and threats of the TOWS strategic options matrix.
>

	External Opportunities (O)	External Threats (T)
	1. 2. 3. 4.	1. 2. 3. 4.
Internal Strengths (S) 1. 2. 3. 4.	SO How can your strengths be used to maximize opportunities?	ST How can you apply your strengths to overcome present and potential threats?
Internal Weakness (W) 1. 2. 3. 4.	WO How can your opportunities be leveraged to overcome weaknesses?	WT How can you minimize weaknesses and avoid threats?

- __5. Click **Save** and then **Done**.
- __6. Click on '**More Actions**' menu.
- __7. Select **Create Artifact Templates**.



- __8. Specify the following details:

Name: [SAFe] TOWS Strategic Options Matrix Template

Description: Template used to create TOWS Strategic Options Matrix artifact for a SAFe Portfolio or Value Stream Canvas.

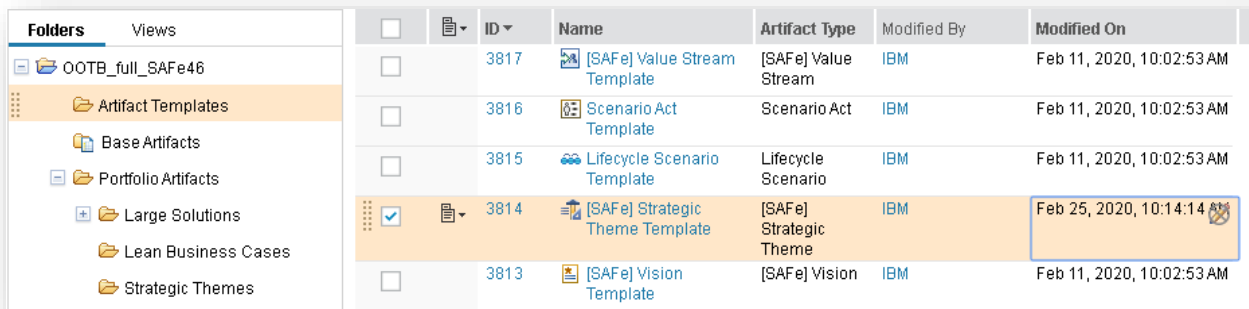
A screenshot of a 'New Artifact Template' dialog box. The dialog has a title bar with the text 'New Artifact Template' and a close button. It contains two input fields: 'Template name: *' with the value '[SAFe] TOWS Strategic Options Matrix Template' and 'Description:' with the value 'Template used to create TOWS Strategic Options Matrix artifact for a SAFe Portfolio or Value Stream Canvas.'. At the bottom right, there are two buttons: 'Create' and 'Cancel'.

- __9. Click on **Create**.
- __10. Click on **Close** to complete the process.

2.2.4 UPDATE EXISTING ARTIFACT TEMPLATES

2.2.4.1 STRATEGIC THEME ARTIFACT TEMPLATE

- __1. Selects **Artifacts** from the menu bar and then *Create > [SAFe] Strategic Theme*:
- __2. Navigate to the Artifacts Template folder.
- __3. Click on [SAFe] Strategic Theme Template document to open it.



Folders	Views		ID	Name	Artifact Type	Modified By	Modified On
OOTB_full_SAF46		<input type="checkbox"/>	3817	[SAFe] Value Stream Template	[SAFe] Value Stream	IBM	Feb 11, 2020, 10:02:53 AM
Artifact Templates		<input type="checkbox"/>	3816	Scenario Act Template	Scenario Act	IBM	Feb 11, 2020, 10:02:53 AM
Base Artifacts		<input type="checkbox"/>	3815	Lifecycle Scenario Template	Lifecycle Scenario	IBM	Feb 11, 2020, 10:02:53 AM
Portfolio Artifacts		<input checked="" type="checkbox"/>	3814	[SAFe] Strategic Theme Template	[SAFe] Strategic Theme	IBM	Feb 25, 2020, 10:14:14 AM
Large Solutions		<input type="checkbox"/>	3813	[SAFe] Vision Template	[SAFe] Vision	IBM	Feb 11, 2020, 10:02:53 AM
Lean Business Cases							
Strategic Themes							

- __4. Click on the **Edit** button.
- __5. Select the entire existing content to delete it.
- __6. Select the following text and **copy-paste** it into the artifact:

[Click to view Type Description](#)

[Strategic Theme Title]

Summary

< Short summary >

Objectives and Key Results (OKR)

< OKR is used to define, organize, and communicate critical information about a strategic theme. It provides a simple approach to create alignment and engagement around measurable and ambitious goals.

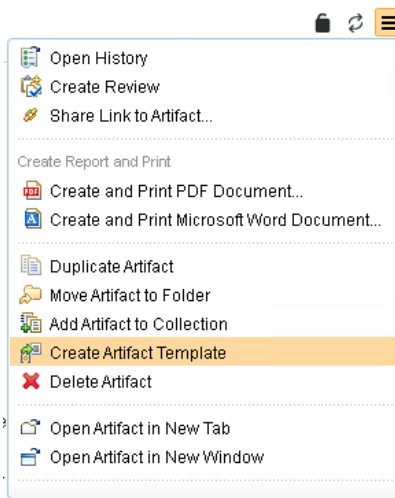
Objectives are a memorable description of what you want to achieve. They should be short, inspirational, and challenging. Key results are a set of metrics that measure your progress towards the strategic theme. For each objective, there should be a set of two to five key results. >

Example:

Objective	Key Results
Increase customer engagement in our community platform	Reduce membership churn from 20% to 5%
	Increase Net Promoter Score from 35 to 60

	<i>Improve average weekly visits per active user from 5,000 to 20,000</i>
	<i>Increase non-paid (organic) traffic from 1,500 to 5,000</i>
	<i>Improve engagement from 30% to 60%</i>

- __7. Click **Save** and then **Done**.
- __8. Click on '**More Actions**' menu.
- __9. Select **Create Artifact Templates**.



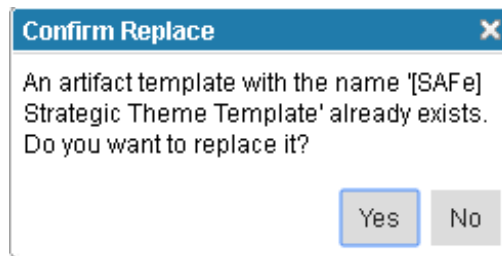
- __10. Specify the following details:

Name: [SAFe] Strategic Theme Template

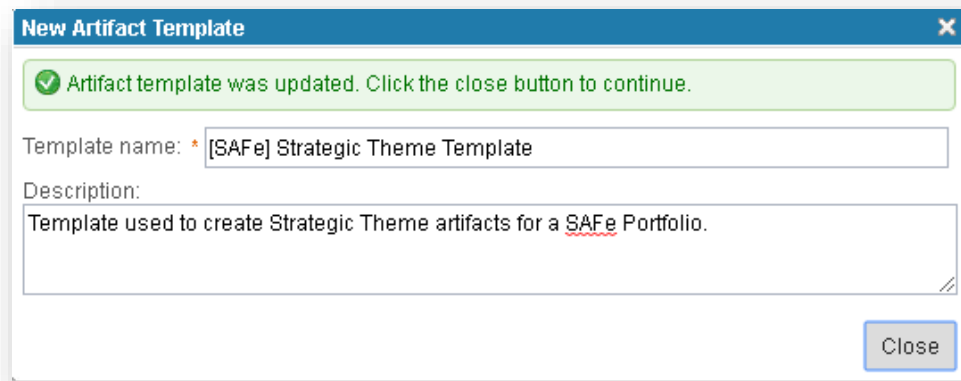
Description: Template used to create Strategic Theme artifact for a SAFe Portfolio.

- __11. Click on **Create**.

__12. Click on **Yes** to replace the existing template with the new template.



__13. Click on **Close** to complete the process.



Congratulations! You have completed the SAFe 5.0 configuration for your DOORS Next SAFe Full, Large Solution or Portfolio environment!

2.3 SAFE 5.0 ESSENTIAL CHANGES

In this section, you configure your existing SAFe 4.5-Essential based DOORS Next project area(s) to support SAFe 5.0 Essential.

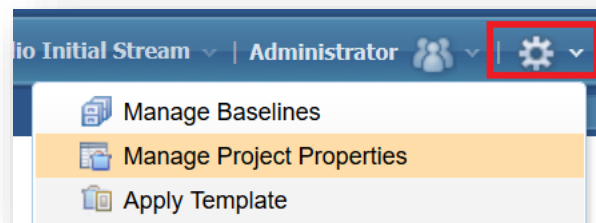
The following changes apply to the Portfolio level:

- Add an additional attribute '**Scope**' to the **Vision** artifact type
- Add a new **Solution Context** artifact and associated template

2.3.1 ADD 'SCOPE' ATTRIBUTE TO EXISTING VISION ARTIFACT TYPE

2.3.1.1 CREATE SCOPE ARTIFACT ATTRIBUTE

__4. Select *Manage Project Properties* from the **Administration** drop-down menu:



__5. Create new Scope attribute type:

__f. Select **Attribute Data Types** and then click **+ New Data Type...** to create a new attribute type.

__g. Enter the following details:

Name: Scope

Description: Extent or boundaries of organization to which the document is applies.

Kind of value: Enumerated list of values

URI: http://jazz.net/ns/enterprise_agile#Scope

__h. Add the following values:

Program

http://jazz.net/ns/enterprise_agile#ScopeProgram

Team

http://jazz.net/ns/enterprise_agile#ScopeTeam

__i. The form should look like:

Name: * Scope

Description: Extent or boundaries of organization to which the document is applies.

Kind of Value: * ☐ Simple ☒ Enumerated list of values ☐ Bounded range of values

Base Data Type: * integer

URI: http://jazz.net/ns/enterprise_agile#Scope

You can assign a custom URI to predicates and resources that are used in linked data representations
Example: 'https://example.com/ns/rm#Priority#high'

Values: *

Value	Label	RDF URI
0	Portfolio	http://jazz.net/ns/enterprise_agile#ScopePortfolio
1	Solution	http://jazz.net/ns/enterprise_agile#ScopeSolution
2	Program	http://jazz.net/ns/enterprise_agile#ScopeProgram

Click on the value, label, or RDF URI text to edit.

__j. Click **Save**.

__6. Create new **Scope** artifact attribute:

__e. Select **Artifact Attributes** and then click **+ New Attribute...** to create a new artifact attribute.

__f. Enter the following details:

Name: Scope

Description: This attribute defines the extent or boundaries of organization to which the document is applies.

Data Type Scope

Initial Value Portfolio

URI: http://jazz.net/ns/enterprise_agile#scope

__g. The form should look like:

Name: * Scope

Description: This attribute defines the extent or boundaries of organization to which the document is applies.

Data Type: * Scope

Number of Values: * ☒ One value allowed ☐ Multiple values allowed

Initial Value: Portfolio

The initial value is assigned to an attribute when an artifact is created

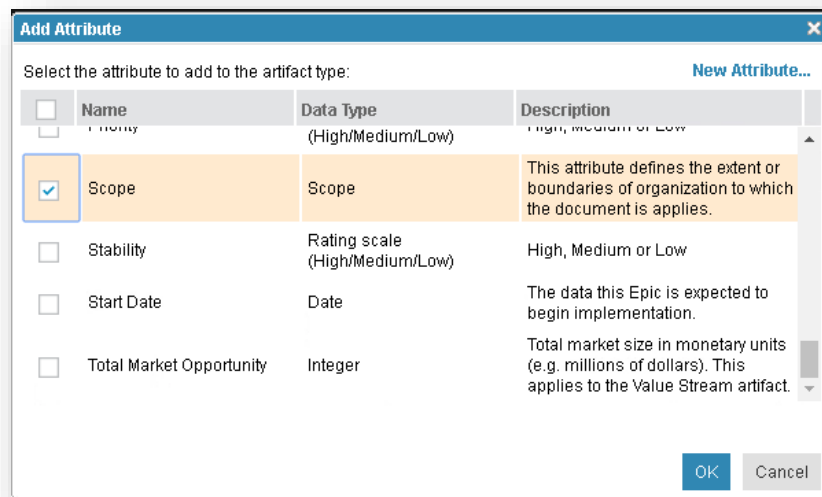
URI: http://jazz.net/ns/enterprise_agile#scope

You can assign a custom URI to predicates and resources that are used in linked data representations
Example: https://example.com/ns/rm#status

__h. Click **Save**.

2.3.1.2 ADD SCOPE ATTRIBUTE TO VISION ARTIFACT TYPE

- __1. Select **Artifact Types**
- __2. Select **[SAFe] Vision**
- __3. Click **Add Attribute**
- __4. Select the attribute **Scope**, created in the previous section, from the list



- __5. Click **OK**
- __6. The attribute list for the artifact type **[SAFe] Vision** should look like:

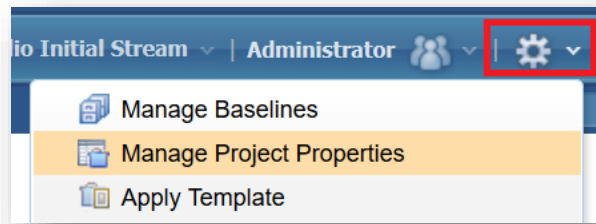
Artifact Attributes			Remove Attribute...	Add Attribute...
Name	Data Type	Description		
Owner	User	Owner or responsible party for the artifact or action.		
Status	Status Values	Status or state of the artifact.		
Scope	Scope	This attribute defines the extent or boundaries of organization to which the document is applies.		

- __7. Click **Save**.

2.3.2 ADD NEW SOLUTION CONTEXT ARTIFACT TYPE

2.3.2.1 CREATE SOLUTION CONTEXT ARTIFACT TYPE

- __2. Select *Manage Project Properties* from the **Administration** drop-down menu:



- __3. Select **Artifact Types** and then click **+ New Type...** to create a new artifact type:



- __4. Specify these details:

Name: :[SAFe] Solution Context


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

URI: http://jazz.net/ns/enterprise_agile#SAFeSolutionContext

Name: * [SAFe] Solution Context

Icon:  [Change...](#)

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

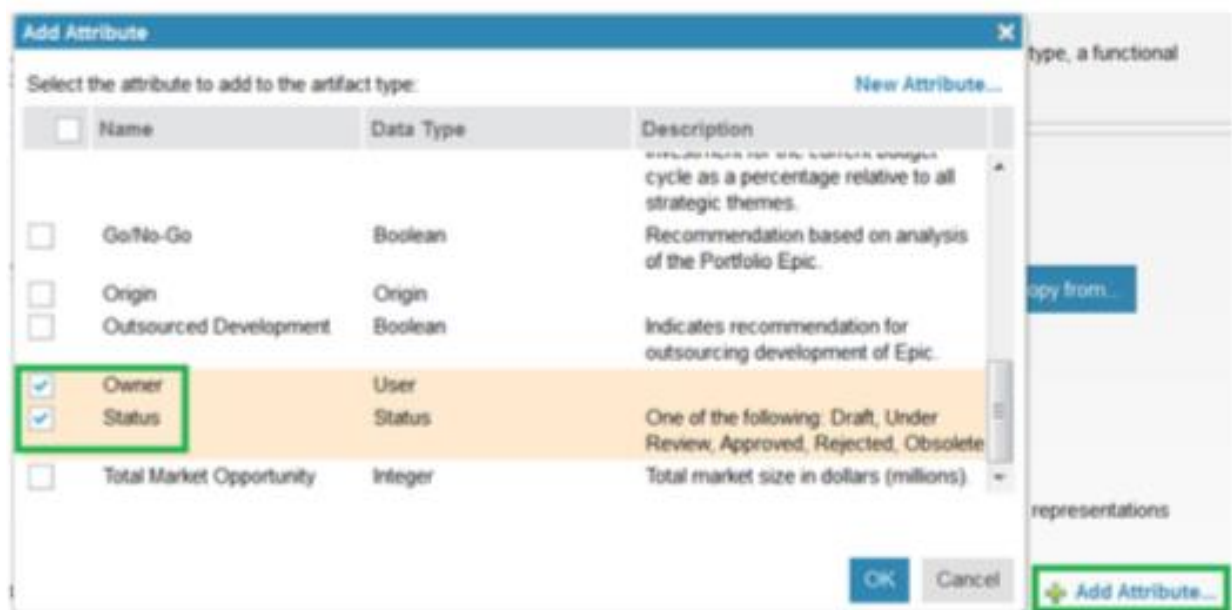
Artifact roles:

- ☐ Use artifacts of this type as glossary terms
- ☐ In modules, display artifacts of this type as headings by default
- ☐ Make this artifact type a preferred upload option

RDF URI:

__5. In the **Artifact Attributes** pane, select **+ Add Attribute...**

__6. Click the checkbox next to **Owner** and **Status**:



Add Attribute

Select the attribute to add to the artifact type: [New Attribute...](#)

<input type="checkbox"/>	Name	Data Type	Description
<input type="checkbox"/>	Go/No-Go	Boolean	Recommendation based on analysis of the Portfolio Epic.
<input type="checkbox"/>	Origin	Origin	
<input type="checkbox"/>	Outsourced Development	Boolean	Indicates recommendation for outsourcing development of Epic.
<input checked="" type="checkbox"/>	Owner	User	
<input checked="" type="checkbox"/>	Status	Status	One of the following: Draft, Under Review, Approved, Rejected, Obsolete
<input type="checkbox"/>	Total Market Opportunity	Integer	Total market size in dollars (millions).

[OK](#) [Cancel](#) [+ Add Attribute...](#)

__7. Click **OK**.

__8. The resulting set of attributes should look like this:

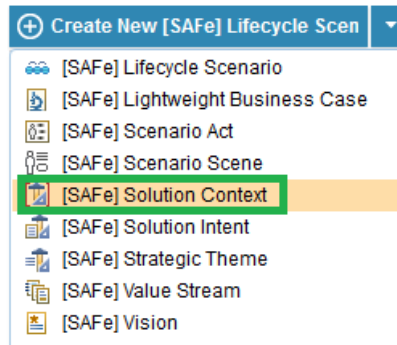
Artifact Attributes [Remove Attribute...](#) [+ Add Attribute...](#)

Name	Data Type	Description
Owner	User	
Status	Status	Draft, Under Review, Approved, Deprecated, etc.

__9. Click **Save** to save your changes.

2.3.2.2 CREATE SOLUTION CONTEXT ARTIFACT 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:

- __3. **Copy and paste** the following text into your new artifact:

[Click to view Type Description](#)

[Solution Name] Solution Context

<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. >

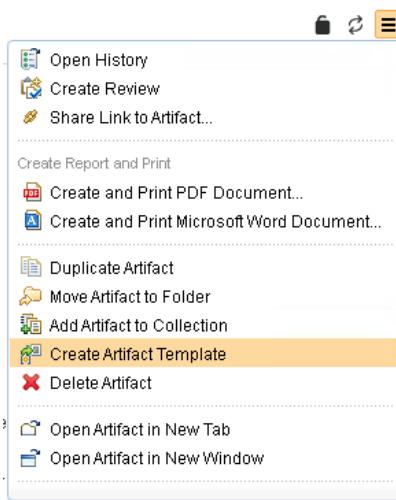
Marketing

<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. >

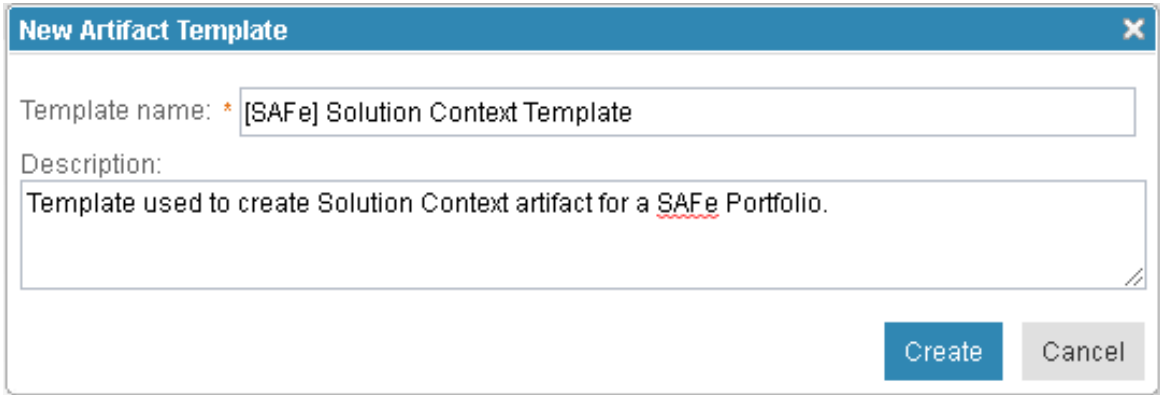
- __4. Click **Save** and then **Done**.
- __5. Click on '**More Actions**' menu.
- __6. Select **Create Artifact Templates**.



__7. Specify the following details:

Name: [SAFe] Solution Context Template

Description: Template used to create Solution Context artifact for a SAFe Portfolio.



New Artifact Template

Template name: * [SAFe] Solution Context Template

Description:
Template used to create Solution Context artifact for a SAFe Portfolio.

Create Cancel

__8. Click on **Create**.

__9. Click on **Close** to complete the process

Congratulations! You have completed the SAFe 5.0 configuration for your DOORS Next SAFe Essential environment!