

# SAFe® Templates: Release Update Log

Last Update: December 16, 2019

## 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 (*in progress*)
- *SAFe 5.0 analysis underway*

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
		RTC	SAFe 3.0 Portfolio templates first released
		RQM	
6.0.2	Portfolio	RDNG	
		RTC	Work item updates Query updates
		RTC	Work Item updates

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

## 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*:  $\% \text{ achieved value} = \text{value (actual)} / \text{value (planned)} * 100$

### 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:
  - Medium Card: Summary, Owned By, Planned For, WSJF, Contribute To link
  - 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**

## 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

## RTC SAFe 4.0 Program Template Updates (6.0.4)

### 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 (6.0.4)

### 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 (6.0.4)

### 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 (6.0.4)

### Project Area Updates

- Added **Test Administrator** role

## RTC SAFe 4.0 Program Template Updates (6.0.5)

### 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 (6.0.5)

### 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

## RTC SAFe 4.5 Essential Template Updates (6.0.6.1)

### 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 (6.0.6.1)

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

## EWM SAFe 4.5 Essential Template Updates (7.0)

### 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 WSJF 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