Atlas 5.1

Atlas Help

2018-06-06

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Atlas Help

Welcome to **Atlas**.

Atlas is a web-based, lightweight Requirements tool focused on enabling business analysts, product managers, and other Project stakeholders to:

- Easily gather and collaborate their ideas using their favorite media (diagrams, work-flows, pictures, presentations, documents, videos).
- Organize and structure those ideas into well formed requirements.
- Prioritize and plan those requirements into a specific time-frame given their agile teams velocity.
- Track the progress of their agile teams work towards their requirements, independently of their agile tool of choice.

 What's New

Check out the full Release Notes *here.* Here are the new features for this release:

- Updated user interface and user experience and color scheme.
- **Plan Editor**: Bulk add Requirements to a Plan.
- Reports include list of file Attachments.
- Desktop Notifications for Broadcasted Messages (does not support Internet Explorer, requires HTTPS).
- CSV Export: Choice between Rich Text and Plain Text Descriptions.

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🌐 **Online resources**

🔍 **Online Help**   Find your answer by viewing the *full version* of the product help on the web.

👥 **Atlas Community**   Visit our *community* for new, articles, and insight on Atlas from developers and users.

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✉ **Provide Feedback**
Email us feedback regarding this Help

What's New in Atlas

5.1

The following are the latest features for Atlas:

- Updated user interface and user experience and color scheme.
- **Plan Editor**: Bulk add Requirements to a Plan.
- Reports include list of file Attachments.
- Desktop Notifications for Broadcasted Messages (does not support Internet Explorer, requires HTTPS).
- CSV Export: Choice between Rich Text and Plain Text Descriptions.

5.0.1

The following are the latest features for Atlas:

CSV Export Options

Atlas now allows you to choose how you want export your CSV **Description** Text in the **Requirements Grid** and tree.
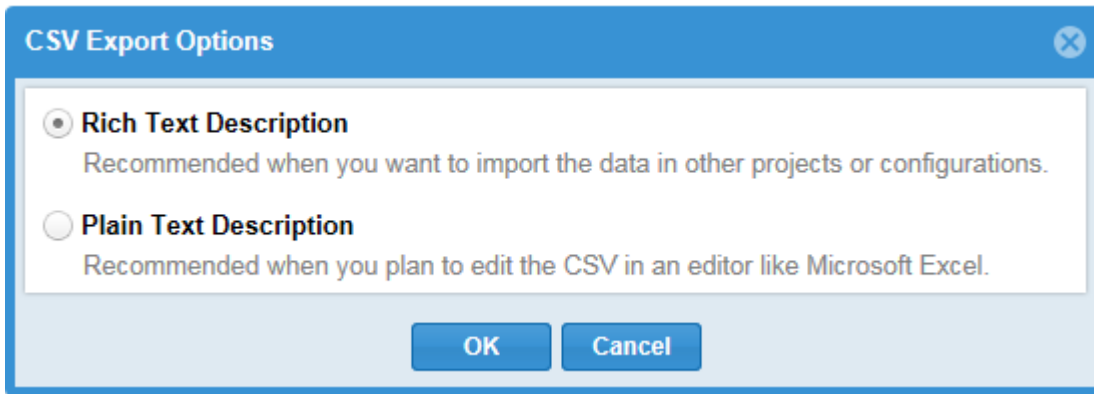
Log File Location

The log files for Atlas and Rhythm are stored in the following location:

```
C:\ProgramData\Micro Focus\Atlas
```

You can specify a different location in the `ALMConfiguration.xml` file by entering the following inside the `<configuration>` element:

```
<atlaslog>
    <dir>C:\path\to\logs</dir>
</atlaslog>
```

Note: This applies to all supported operating systems.

5.0

The following are the latest features for Atlas:

Relationship Tracking

You can now automatically version Requirements when a relationship to other objects (Requirements, Concepts, Plans, Stories) are added/removed. Including these types of actions in version history provides users a greater understanding of changes and their impact across large plans. For example, with version compare users can quickly understand if/when a Requirement was moved out of release scope. This capability also works with manually created Relationships (across Requirements and Agile Stories). For configuration information, refer to the Installation Guide.

Updating Attached Files

When you want to make an edit to a file that is already attached to a Requirement, you can simply download the file 📂, make the update, and click 🗐 to upload/replace the original file.

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Paste Special

After you have cut or copied your requirement, you can now paste special as child, paste special below, or paste special above. Paste Special allows you to paste with customized options, such as creating relationships, copying relationships, and keeping hierarchical structure.

Filters Support Multiple Select Items

Filters now support multiple selection items such as UDAs. When selecting the criteria for a multiple select Where clause item, select all required items from the type of criteria listed.

License Management

Atlas Planning and Tracking Suite now provides the ability for Administrators to manage *Named* licenses per user, in addition to *Concurrent*.

Restore from Version

At times, you may want to return to previous versions of a Requirement. Restoring a previous version only restores the description, name, and attributes. Relationships, discussions, attachments, and tags are retained from the current version.

Additional Relationship Details in Reports

Reports now contain more details regarding Relationships. Details included are Direction, Relationships Type, Status, Item Type, and Name. Additionally for version comparison reports, a column displays at the beginning of the table indicating the type of change.

Run Comparison Report on Two Past Labels

You can now compare two labels in the Time Machine in a report. The report always compares the most recent label to the older label, regardless of the label you are viewing in Atlas.

Test Overview Included in Reports

An overview of test results is now and option to include in all reports. Check Test Overview when selecting items to include the report.

Report Format Changes

This release introduces several enhancements to the report formatting, such as:

- The reports ignore extra returns at the beginning and end of requirement descriptions, reducing the amount of whitespace within each requirement entry. Extra spaces within the text are retained as they are considered part of the author's formatted text.
- Page breaks only occur for top level-requirements, removing gaps and extra page space between related information.

Data Displayed in Filtered Requirement Reports

When creating a Requirement report with a filter, the report includes the name of the parent, but does not include details if the parent does not meet filter specifications. This gives context to requirement locations within the hierarchy.

Sibling requirements that do not meet the filter specifications do not appear in the report.

Hierarchical Table of Contents

The generated report table of contents is now in an hirarchical structure that goes five levels deep. Any requirements deeper than five levels are presented on the fifth level in the table of contents.

Discussions User Notifications

Discussions notifications have been expanded so that users mentioned anywhere in the discussion thread and users participating in the discussion will receive email notifications, if the administrator enabled e-mail notifications.

Print Selected Requirements

Print Selected Requirements generates a Microsoft Word document of the requirements that you select from the Requirements Tree. It is a quick way to generate a filtered Requirements report from the Define perspective.

Lock Requirements from the Requirements Grid

When you edit a requirement, the requirement is locked so other users cannot edit. If another user attempts to edit the locked requirement, they receive a message stating that the requirement is locked. If you have customized the Requirements Grid columns to show the **Lock** column, a lock icon appears in the column next to the locked Requirements.

Editing Multiple Requirements in the Requirements Grid

When there are multiple requirements needing the same edits, the Requirements Grid provides an easy way to select a group of requirements and make the change once. Select the requirements to edit, activate one of the column for one of the requirements, and make the change. All the selected requirements reflect the change.

Filter Options in Relationship Diagram

You can now filter the Relationship Diagram by Relationship Type, Relationship Status, and Item Type.

Updates to Search Results

Search results are now configurable and resizable

Additionally, an Item Type column is now available, displaying the type of item that matches your search.

Export to CSV File from Requirements Grid

Exporting to a CSV file from the Requirements Grid offers more control over the information included in the exported file than exporting from the Requirements Tree. The exported file maintains the filters, column selection, column order, and sort order of your Requirements Grid.

Time Machine Available from More Perspectives

Time Machine is now available in all perspectives, except Home.

Time Machine Performance Enhancements

Various enhancements to Time Machine improves the performance. For example: a shared Web cache is enabled across the application, allowing faster load times.

Ability to Generate Reports Based on Time Machine

While in a Time Machine view, you can now generate a report based on the view.

Access to Reports from All Perspectives

Reports are now accessible from any perspective.

Plan Review Comparison Report

Plan Review reports now have the option to create a comparison to Time Label states created in the Time Machine. The report notes items added, items modified, and items deleted. The index notes areas that are modified or unchanged, giving you a quick glance and access to the areas that most interest you.

Directional Flow in Relationship Diagram

Relationship Diagrams are organized by To and From relationships. When you select a requirement and view the Relationships Diagram, requirements linking to the requirement display on the left of the diagram flowing to the selected requirement. Whereas, requirements linking from the selected requirement display to the right flowing away from the requirement.

Visual Indicators in Relationship Diagram

Relationship Diagrams have indicators to help determine relationship and status at a glance.

- Green lines indicate an `Up-to-Date` relationship.
- Red lines indicate a `Suspect` relationship.
- Orange lines indicate a `Deferred` relationship.
- Gray, solid lines indicate a parent-child relationship.
- Dashed lines indicate a relationship with an external project (cross-project).
- Solid lines indicate a relationship within the current project.

Additionally, if you hover over the connecting lines, status details appear.

Filter Relationship Diagram

You can filter the Relationship Diagram to display relationships based on Relationship Type and Relationship Status.

Rhythm

Rhythm is the new delivery-focused application within the Atlas Planning and Tracking Suite allowing agile teams to breakdown and manage work delivery in agile cadence. Some features include:

- Enables definition and breakdown of program objectives into actionable stories.
- Defines/manages sprints and team releases.
- Collaborate and status with the Team Room's List and Card views.
- Tracks progress against defined dates and payloads.

Redesigned Filters

Filters now open in a separate dialog box that has been redesigned to show filters in a clear, concise, and understandable way. You can view the filter list while creating new filters and make inline edits of a selected filter. Additionally, you can duplicate an existing filter to use its criteria toward a new filter.

Track Requirement Progress across Projects in Gantt

Atlas offers a new column in the Gantt chart called Projects, enabling you to quickly view the requirement's progress across all projects. Click the Requirement to open the various associated stories and projects.

New Relationship Capabilities

Relationship types and direction can be defined through the relationship dialog boxes as you step through setting up relationships. This offers more control over the direction and type of relationship while you are creating it or editing it.

Additionally, relationships can be filtered by status in the Relationship tab.

Ability to Push Stories to Multiple Projects

Atlas now provides the ability to push stories to multiple projects. The Server Administrator creates a Delivery Projects user defined attribute, assigns projects to it, and attaches the UDA to the appropriate Requirement Type. When users push to backlog, a story is added to the projects that were selected in the Delivery Projects UDA.

Diagramming

Atlas now contains native diagramming capabilities that you can use as Concept or Requirement types. The vast *Shapes* library contains the following for standard diagrams: BPMN, UML, Flowcharts, Use Case, Lean Mapping, Process Engineering, SysML, EIP, Cisco, AWS, Azure, and more. For mockups, there are shapes for Windows Applications, Internet Applications, iOS, and Android.

Watch a video to learn how to diagram *here*.

Synchronizing Requirements

Many times the same Requirements are used for multiple Projects. Atlas provides the ability to reuse requirements by defining them once centrally, and connecting (synchronizing) them with other Projects.

Milestone Tracking

Agile teams move quickly, incrementally adding new capability sprint after sprint. The agile delivery team is dependent on requirement information to assure priorities/expectations are clearly understood upfront. When the project milestone planning (content, priority, purpose, and timing) side is not ready, the delivery team is left to make assumptions to fill in the gaps. This practice can lead to misaligned expectations and rework. Those on the business side need to align their milestone planning with the delivery team's sprints.

Atlas Requirement Date Planning enables Atlas users to define specific definition dates for features, and measure/track against those time-frames. By defining and tracking the project milestones, Atlas users can align their work with the delivery team, assuring business needs are available when requested by engineering.

Date Type User Defined Attribute

The Date Type User Defined Attribute type allows Administrators to create any date value for their projects.

New Requirement Type: Diagram

A new *Diagram* Requirement Type allows you to create diagrams instead of text descriptions for your Requirements. The Diagram Requirement Type is designated with a ⬓ icon in the Requirement Tree.

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This release of Atlas includes numerous performances improvements and fixes targeted at enhancing and stabilizing your experience with the Atlas platform.

Additional Report Options

You can now add or remove page breaks between Atlas artifacts like Requirements and Stories. Additionally, you can choose to include system attributes in your reports.

Testing Tool Integration

Atlas can now connect directly to your testing tool to send and synchronize Requirements. When tests occur, Atlas receives the test execution status in the context of the Requirements. To do this, an administrator will connect your testing tool to Atlas via Micro Focus Connect, and users can use the **Define** and **Track** perspectives to view test execution details.

Detailed Activity Feed

The activity feed is now organized into easy to follows sections with nesting to identify relationships. At a glance, you can view changes to your items, track status on Requirements and Stories, and view warnings that highlight items that Atlas has identified may need action.

Agree or Disagree in Discussions

With the new Agree or Disagree buttons, you no longer have to reply to a discussion to express your opinion on a topic. Quickly click 👍 (Agree) or 👎 (Disagree) button next to the user's comment. After the team has come to a resolution, contributors can close the discussions as Approved or Rejected.

Intuitive Discussions Functionality

Discussions are now organized by topic with replies nested below the associated topics. Collapsed topics contain details of last time or date updated, participant names, topic title, description, and approve or reject status. Additionally, clicking GoTo on a discussion from the Activity Feed with open the discussion in the exact position of the new item.

Hide Disabled UDAs from UDA List

With a click of a checkbox, you can now hide disabled UDAs from the UDA list in the Administrator Tool, making it easy to find the relevant UDAs for your Project.

Disabled UDAs No Longer Appear in Various Requirement Views

When disabling an UDA in the Administrator Tools, the UDA no longer appears in such areas as the Requirement Grid and the Attributes tab.

Multi-line Text UDAs

You can create multi-line text fields for a UDA. All attributes over 50 characters long will render a multi-line text box.

Multi-Select List UDAs

Administrators now have the ability to create lists with multiple selections. Choose **List - Multi Select** data type in the Administrator Tool to create the new list.

Open Requirements and Stories from the Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart. Click the icon next to the requirement or story and the item will open in a new browser tab.

Tracking Details Available in Activity Feed

When you first log in, you can quickly view tracking details on the latest changes right in your Activity feed. Plan names are displayed with the Requirement or story, as is status details, and pie chart.

Warning for Items Needing Action

Check the **Warning** checkbox in the Activity feed to find items that require action, such as items with no relationships.

Navigation within Help

Access the Atlas Online Help from anywhere in Atlas with the Information icon. Choose Atlas Context Help to open help relevant to the perspective you are currently using or access the Atlas Online Help to view all topics. The Atlas Online Help contains a table of contents, index, and search, making navigating to any topic convenient and easy.

Video Training Series Available on YouTube

View the Atlas video training series on *YouTube*.

Relationship Diagram

The new Relationship Diagram provides a graphical representation of the relationship between items, allowing you to visualize the relationships for a requirement. It displays not only the top-level relationships, but also allows you to click and follow relationships further down the hierarchy.

Define Project Specific Filters

As you interact with many Projects, you want to define filters that are Project specific. This release provides the ability to define filter specific to each Project, making you results list manageable and succinct.

View and Access Plans from Requirements Grid

The new Plan column in the Requirements Grid allows you to see if a Requirement has been added to a Plan(s). Selecting the plan from the Requirements Grid or the **Plans for Requirement** dialog, opens the plan in view mode. Additionally, you can add the Requirement to a Plan or remove the Requirement from a plan all within the **Plans for Requirement** dialog.

Quickly Save a Snapshot of a Moment in Time Machine

The new Save feature in Time Machine allows you to quickly save the moment you are viewing.

File Name Changes Visible in Compare

When comparing versions, file changes are available in the Files field of the attributes. The comparison tracks when files are added, removed, or names have changed.

Requirements Recycle Bin

Retrieve recently deleted requirements from the Recycle Bin. The Recycle Bin displays the last 50 deleted requirements. To ease your search, use **Find Requirements** or select a month and year to display only the Requirements meeting your criteria. Click the Retrieve icon to replace the requirement within the tree.

Attach Files to Requirements

You can attach any file type to your Requirement. While in the Define perspective, open your Requirement, click the Attachment tab, and browse to your file.

Historical View of Activity Feed

Choose a date to view the Activity Feed at any point in the past for that Project, allowing you to quickly view past changes.

Copy and Paste Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirement so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste. Requirement and Project IDs are copied, but Relationships and child Requirements do not copy and paste with the selected Requirements.

Display Search Results from Specific Projects

You can now display search results from all projects, current project, or specific projects. This provides manageable sized search results and allows you to search in projects of interest to you.

Turn Requirement IDs on or off in Tree

With a simple click of a button, you can view Requirement IDs in the Tree View.

Hyperlink Back to Atlas in Exported CSV File

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

Time Machine Difference Overview

The Time Machine in the Tracking perspective uses Atlas's version capability to allow you to view historical delivery data. The Difference Overview panel helps you quickly understand the true changes that have occurred over time across the integrated tools.

Version Compare in Activity Feed

You can now view version comparisons of Requirements and Stories on the Activity feed.

Detailed Differences in Compare

For easy identification of changes, Compare provides detailed differences highlighting description changes in color when comparing versions of Requirements and Stories.

Combined Whiteboards and Concepts in Relationships

When adding Relationships, Whiteboards and Concepts are combined on one tab. You can now see to which Whiteboard the concepts belong instead of seeing a long list of concepts.

Show Associated Plan in Requirement Deliver Status

While in a Requirement, you can quickly view the associated Plan. If there isn't an associated Plan, you can click the field and select a Plan right within the Requirement. Additionally, you can click the Plan in the Delivery Status of the Requirement and you can open it. If the requirement is in multiple plans, the Deliver Status states "Multiple." Click **Multiple** to show a menu that allows you to choose the plan to open.

Atlas Planning and Tracking Suite

Atlas, Atlas Hub, Micro Focus Connect and StarTeam Agile are now installed together as part of the new **Atlas Planning and Tracking Suite**.

Web-Based Training

Use the following link to order the new, free Atlas web-based training. Order it *here*!

Compare

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

You can compare versions of Requirements and Stories.

Preserve Microsoft Word Format When Importing

When importing Microsoft Word documents as requirements, Atlas preserves tables, bulleted and ordered lists, font colors, and formatting.

Requirement Authoring Improvements

With this release, there are several usability improvement with Requirement authoring, including: (1) Improved image resizing, (2) Drag and drop images within the Requirement Editor, (3) Paste images directly in Google Chrome, (4) Indicate spelling errors for misspelled words, and (5) Press Ctrl+Click on the misspelled word to enable the built in browser context menu with spelling suggestions.

Report Generation

A Microsoft Word-based report generation capability that allows for the creation of detailed requirement, plan and tracking reports. Report scope can be narrowed down using either filters or generated for full projects. Each report can optionally include Attributes, Relationships, Tags, Discussions and Delivery Tracking data.

Cross Project Relationships

Relationship management has been extended to provide the ability to create relationships across projects. This enables users to accurately represent the complex dependencies that exist in large projects.

Time Machine Difference Identification

The **Time Machine** allows users to view delivery status at an historic plan date/time. The newly added **Difference** view enables users to understand date and scope changes quickly and in detail.

Introduction

Atlas consists of five perspectives. The icons to access the perspectives are located across the top of the page:
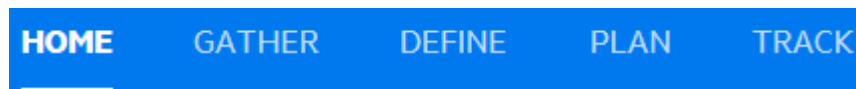
Before you start using Atlas, you'll need to understand the organizational structure. Atlas uses *Projects*, *Requirement Types*, and *Requirements* to organize and convey information. These levels are nested within each other, with *Projects* being the topmost container.

Projects

Atlas stores Requirements in Projects. Projects stored in the same server share a common set of properties (Requirement Types, Attributes, security profiles, users, and groups).

Requirement Types

Atlas organizes Requirements by type. A Requirement Type defines a logical grouping of Requirements that share common Attributes. Atlas makes it easy to re-use Requirement Types among Projects. Once

created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.

Requirements

Requirements are the primary artifact in Atlas. Use the **Requirement Tree** and the **Requirement Grid** to view your Requirements. You can toggle between the two by clicking the corresponding icon in the **DEFINE** perspective.

Requirements Management in Atlas

Requirements management involves establishing and maintaining agreement between customer and developer on both technical and non-technical requirements. This agreement forms the basis for estimating, planning, performing, and tracking project activities throughout the project and for maintaining and enhancing developed software. Studies have shown that 30-35% of software development effort is spent on rework, over 50% of software defects are attributed to requirement errors and over 80% of rework effort is spent on requirements related defects. Getting requirements management right pays huge dividends in delivering software solutions to your customers in a time frame that satisfies them.

Agile Requirements

Agile requirements follow an iterative planning cycle. From conceptualization, to review, and through edits, requirements evolve into a plan for development. It is from this point, when the requirement is handed over to the development team, that the requirement becomes Agile.

What is Agile development? It is an interactive method used to determine requirements for development projects. It is highly flexible and interactive, allowing the project scope to change rapidly and frequently. There are many tools on the market that enable and enhance the Agile development cycle.

Atlas, with its Requirement management, Whiteboards, and Plan development, is a perfect tool to use in an Agile environment. Integrating with Agile tools enables project managers to link Requirements to Stories and view progress for each iteration. Atlas provides the ability for project managers to recognize scope creep and react quickly. Also, they can determine from the **Status** tab or **TRACK** perspective, whether a change to a Requirement will negatively impact the delivery dates.

Additionally, open communication between team members and project stakeholders is essential to the success of an Agile team. Atlas's Discussion functionality provides this critical ability to all members of the team, allowing rapid changes to the project as it evolves.

Using Atlas

Your Atlas administrator has installed and configured Atlas and has provided you with a URL for access.

Atlas is organized to follow a natural flow of Requirement creation to user Story breakdown. As you work through the perspectives, you are following the flow from the Requirement creation to tracking progress in your Agile tool. However, you can skip around within the perspectives and work in your own flow.

Use these steps for a basic overview of tasks to complete your planning from start to finish. Navigate through the perspective sections of the help to view additional and advanced tasks.

The suggested flow is:

1. Navigate to Atlas in your browser and log in. Atlas opens.
2. Capture high-level business needs and break them down.
   a) Create a Project.
   b) Define Requirement Types.
   c) Set up User Defined Attributes.
   d) Optional: upload ideas to a White boards.

e) Create Requirements for the Project. You can create Requirements or convert Concepts into Requirements. You can also setup relationships between Whiteboards and Requirements or Requirements to Requirements.

3. Rank Backlog of Requirements.

   a) Change item rank in list.
   b) Open Requirement in hierarchical context from the Grid view (flat list).
   c) View Requirement subsets in Grid.
   d) Order Requirements based on rank within the Grid.

4. Create a Plan and add Requirements to the Plan.

   a) View list of Plans.
   b) Open a Plan.
   c) Review items to include in Plan.
   d) Use Plan contents and team capacity to project Plan end date.
   e) Define a Requirement Plan with start and end dates.
   f) Review hierarchical list of item to include in Plan.

5. Add Requirement detail to top of Backlog.

   a) Understand summary delivery status from an individual Requirement.
   b) Find and existing Requirement using search.
   c) View status of related stories from within a Requirement.

6. Send Requirement to Agile Backlog.

   a) Optional: Add additional Requirement to a previously pushed plan.
   b) Optional: Re-send an updated Requirement.
   c) Optional: Re-send an updated Plan.

7. Track Requirement and Story progress.

   a) View Plans with high level status.
   b) View Plan delivery status and analyze progress and projection.
   c) View delivery Plan from previous date.

Starting Atlas

To start Atlas:

1. Open a supported web browser and type in `http://<hostname>/atlas/`.
2. If you receive a message similar to `This application has an update, reload?`, click **Yes** to ensure you are using the latest version installed on the server.

Using Atlas with Rhythm

Rhythm and Atlas are two of the main components of the Atlas Planning and Tracking Suite. You use Atlas to define, to capture, and to track the business needs of the organization as Requirements. You use Rhythm to plan, to status, and to track the day-to-day Agile activities of the project team. Atlas pushes Requirements into Rhythm as Epics where the product team breaks them down into smaller consumable Stories. These Stories are then worked through the full Agile process. Daily status, state and all related tracking data is integrated back into Atlas for real-time portfolio visibility for all stakeholders.

The specific integration points are as follows:

Projects

You can create new projects in Rhythm, but Projects are *common* between Atlas and Rhythm so any Project created in one is available in the other.

Users

Although Users are common between Atlas and Rhythm, the administrator needs to set project access rights for each user.

Starting and Logging In

You can open Rhythm from within Atlas, but there are other ways to start the application:

- An administrator logged into the install machine can use the **Start** menu to launch Rhythm: **Start** > **All Programs** > **Micro Focus** > **Atlas** > **Rhythm**.
- Other team members can navigate to: `http://<hostname>/atlas/#perspective=agile` to start Rhythm.

Requirements

You *Push* Requirements from Atlas into Rhythm as Epics, using one of the following methods:

Individual Requirement	From the **Actions** menu ⚙ of a Requirement, select **Send to delivery Backlog**.
Full Plans	In the Atlas **Plan** perspective, edit a plan and click **Send to delivery Backlog**.

Working with Projects

Use the Projects button ▤ (top right) to open the Projects window. From here you can switch, manage, administer, and run Reports on your Projects.

Creating a Project

You must create Projects in order to add Whiteboards and Requirements. Projects organize the information into a high-level category.

▷ Watch how to do it: *Creating a Project*.

1. Click the Projects ▤ button to open the Projects window.
2. Click ⬚ **New Project**. The **Create Project** dialog box appears.
3. Type the **Name** of the Project.
4. Choose the visibility option (`Public` or `Restricted`) from the list.
5. Enter the **Project Description**.
6. Click **Save**.

💡 **Tip:** To view activity on the new Project, click ★ (**Favorites**) next to the Project **Name**.

Deleting a Project

✏ **Note:** This procedure can only be performed by Project administrators.

1. Click the Projects ▤ button to open the Projects window.
2. Hover over the Project you want to delete.
3. Click 🗑 **Delete**.

Editing a Project

1. Click the Projects ▤ button to open the Projects window.

2. Click **Edit** (✎) in the top right corner of the window. The **Edit Project** dialog box appears.

3. Make changes to the Project **Name** or **Description**.

4. Click **Save**.

Opening a Project

You must open a Project before you can create Whiteboards, create Requirements, and create and track plans.

✎ **Note:** After you've selected favorite Projects by clicking the **Favorite** icon (★), you can open Projects from your **Favorites** list.

1. Click the Projects ▤ button to open the Projects window.

2. Select a Project from the **Favories** or **All** lists. The Project becomes active.

Administration

Atlas has two levels of system administration: Server administration and Project administration. The **Administrator Tools** contains tabs allowing both administrators to manage Atlas data.

The tab group on the left is specific to Project administrators. Project administrators can only manage items in these tabs. These include Project default values, Requirement Types, and project access.

The tab group on the right is specific to Server administrators. Only Server administrators can access these tabs. Additionally, Server administrators have Project administrator rights. Server administrators manage specific settings including defining Requirement Types, User Defined Attributes, users, and also configuring Borland Connect.

Administrators click the **Admin Tools** button on **Home** to open the **Administrator Tools** window.

Setting Default Save Location for Stories

Project administrators can use the following procedure to determine where Stories are saved by default.

⚠ **Important:** This is a per-Project option and must be set for each new Project.

▷ Watch how to do it: *Changing Default Values*.

1. Log in with Project Administrator credentials.

2. Choose a Project from the **Projects** list ▤.

3. Click **Administration**.

4. Click the **Defaults** tab.

5. Click **Agile Integration**.

6. Select one:

Root of Backlog When Requirements are pushed from the **DEFINE** or **PLAN** perspectives, they appear at the top level of the Agile Backlog.

Under existing Story	When Requirements are pushed from the **DEFINE** or **PLAN** perspectives, they appear nested under the selected Story. After selecting this option, choose the parent Story.

7. Click **Save**.

Enabling Testing Tool Integration

Atlas is integrated with testing tools Silk CentralMicro Focus ALM. Bring transparency to test team activities by using Atlas to view test activity for each Requirement. Show related test count and status, and understand how test execution has changed over time, providing visibility to incremental testing progress. Defined requirements can be sent directly to the testing environment to provide testers a clear understanding of required behavior. Direct synchronization helps test teams improve application quality, ensuring test criteria derives from business requirements. Integration means test teams can view, and test tools stay in sync with, defined requirements as they evolve.

Project administrators can use the following procedure to enable testing tool integration.

Note: You need to have a testing tool connector (such as the Silk Central Connector) running in Micro Focus Connect for test information to be sent to Atlas.

Watch how to do it: *Changing Default Values*.

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click the **Defaults** tab.
5. Click **Test Integration**.
6. Click **Enabled**.
7. Use **Graph Duration (days)** to configure how long of a time span for which you want to see test results. These are displayed in the Requirement **Tracking** Tab.
8. Click **Save** and close **Admin Tools**.

Setting Default Requirement Values

Project administrators can set default values for **Rank**, **Estimate**, **Status**, and **Priority**.

Watch how to do it: *Changing Default Values*.

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click the **Defaults** tab.
5. Click **Workflow**. The default options appear.
6. For **Rank**, enter an integer value
7. For **Estimate**, enter an integer value.
8. For **Status**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.

   For Requirement definition planning dates, set the default status in the **Completed** field.
9. For **Priority**, put a check next to the **Possible Values** that you want to use. Click **Add Value** to add a new value to the top of the list. Double click an existing value to change it.

10. Click **Save**.

After the defaults are set, the default values appears in the appropriate fields when you create a Requirement. You can override the defaults by editing the appropriate fields in the Requirement.

Setting Default Requirement Types for a Project

The Project administrator can set the available Requirement Types for the Project using the steps below.

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click **Project Req Types**.
5. The available Requirement Types appear in the list on the right. The **Associated Requirement Types** for the Project are on the left. By default, Diagram, Business, and Software Requirement Types are associated with projects. Hover over a Requirement Type in the **Available Requirement Types** list and click the **+** to add it to the **Associated Requirement Types** list.

Setting Project Access Rights

Project administrators can add/remove users from Projects based on role. The following roles are available:

Viewer	A *Viewer* can see the Project in the list of Projects, can add it as a favourite, and view all of its assets. *Viewers* can't edit or delete assets. *Viewers* can perform operations such as generating reports, but generally they can't change the data or the configuration of the Project.
Contributor	A *Contributor* can do everything a *Viewer* can do plus they can edit the Project data. They cannot modify the configuration of the Project (no access to **Admin Tools**).
Administrator	A project *Administrator* can do everything a *Contributor* can, plus they can modify Project configuration via the **Admin Tools**.

> **Note:** A *Project administrator* is not the same thing as a *Server administrator*. In order to be a *Server administrator*, another *Server administrator* needs to apply `Server Administrator` permissions to that user in the **Privileges** group of the **Users** tab. See **Managing Users**.

> **Note:** A user can have multiple roles based on the projects they are working on. For example, a project administrator for `Project A` could be a `Project Viewer` on `Project B` while a viewer on `Project B` could be a contributor for `Project A`. The roles and permissions are project based, with the exclusion of the `Server Administrator`.

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click the **Users** tab.
5. Select a user.
6. Click the **Edit User** icon .
7. Enter the user **Privileges**:

   Check the **Server Administrator** check box to make the user a *Server Administrator*.
8. Enter the user **Login Status**:

   Check **Suspended** to lock the user out.

   If the Atlas Hub has Active Directory configured, you can use it by checking **Active Directory**.

9. Click **Project Access Rights**.

10. In the **View** pane, there are two sections: **Atlas** and **Rhythm**. Each has **Viewers** and **Contributors** buttons. Click one of the buttons. The list of users with that role in the Project is displayed.

11. To add a user with that role, hover over a user in the **Available Users** list and then click **+**. The user is added to the Project in the role that you selected.

12. Click ⚘ **Make Public** to make the Project public. If you don't see that option, click ☰ and then select ⚘ **Make Public**.

13. Click 🔍 (**Reset Permissions**) to remove all users from roles in the Project. Doing this will give each user access to the Project as a *Contributor*. However, only users with *Server administrator* credentials can manage the Project.

Defining Requirement Types

Atlas organizes requirements by type. A Requirement Type defines a logical grouping of requirements that will share common User Defined Attributes.

The key properties of a Requirement Type are:

- A name (displayed in the Requirement tree).
- A set of User Defined Attributes on the user interface.

Atlas makes it easy to reuse requirement types among Projects. Once created, a Requirement Type can be assigned to any Project, minimizing the time it takes to create Projects.

Server administrators can follow the steps below to create and modify Requirement Types.

After creating them, associate User Defined Attribute Groups with the Requirement Type.

▶ Watch how to do it: *Adding New Requirement Types* and *Associating Requirement Types with a Project*.

1. Log in with Server Administrator credentials.

2. Choose a Project from the **Projects** list ☰.

3. Click **Administration**.

4. Click the **Define Req Types** tab.

5. If you want to create a new Requirement Type, click **New Requirement Type** and then add a name.

6. Select a Requirement Type in the **Define and Configure Requirement Types** list. The Requirement Type is opened on the right in the **Configure** section.

7. Add/remove User Defined Attribute groups using the **Available User Defined Attribute Groups** list.

Defining User Defined Attributes

A *User Defined Attribute* allows you to create a custom field for your Requirement Type. Normally, an administrator creates and assigns User Defined Attributes while creating a Requirement Type or a Project.

▶ Watch how to do it: *Creating User Defined Attributes* and *Creating Attribute Groups*.

1. Log in with Server Administrator credentials.

2. Choose a Project from the **Projects** list ☰.

3. Click **Administration**.

4. Click the **Define UDAs** tab.

5. Check **Hide Disabled UDAs** to reduce list size and make it easier to see if a UDA is already created.

6. Click **New User Defined Attribute.**

7. Enter a **Name**.

8. Enter a **Display Name**.

9. Select a **Type**: `Text`, `Number`, `List`, `List - multi Select`, or `Date`.

10. To enforce users to enter a value, click **Required** in the **Conditions** group.

11. Do one of the following:

    a) For the `Text` data type, enter a **Max length** value. Text attributes that are over 50 characters long will render as multi-line text. Whereas, those that are up to 50, will render as a single-line text.

    b) For the `Number` data type, if you want the values to roll up through the Requirement, select **Rollup Values** in the **Conditions** group.

    c) For the `Number` data type, enter a **Default value**.

    d) For the `List` data type, use the **Values** group to add values to the list. Enter a **Default Value** for each.

    e) For the `List - Multi Select` data type, use the **Values** group to add values to a selection list. Enter a **Default Value**.

12. Click **Save**.

Hiding User Defined Attributes

To remove a User Defined Attribute from the **Attributes** tab on Requirements and from the **Requirement** grid column:

1. Log in with Server Administrator credentials.

2. Choose a Project from the **Projects** list ▤.

3. Click **Administration**.

4. Click the **Define UDAs** tab.

5. Select the UDA to disable.

6. Uncheck **Enable**. The UDA is hidden from all UDA areas of Atlas.

Pushing Stories to Multiple Projects

In order to push a story to multiple project backlogs, create the `Delivery Projects` user defined attribute:

1. Log in with Server Administrator credentials.

2. Choose a Project from the **Projects** list ▤.

3. Click **Administration**.

4. Click the **Define UDAs** tab.

5. Click **New User Defined Attribute**.

6. Create an user defined attribute named exactly `Usr_DeliveryProjects`.

7. Type `Delivery Projects` in the **Display Name** field.

8. Select **List-Multi Select** from the **Type** drop-down.

9. Add the projects where you want stories added to their backlog.

10. Click **Define Req Types** tab.

11. Select a **Requirement Type** or create a Requirement Type in which to associate the **Delivery Projects** UDA.

12. Choose **Delivery Projects** from the **Available User Defined Attribute Groups** list and add it to the Requirement Type.

13. Close the **Admin Tools**.

When a user pushes to backlog, a story is added to the projects that were selected in the **Delivery Projects** UDA.

Enabling Requirement Date Planning

By default, the **Completed Date** User Defined Attribute is enabled. This allows users to enter a **Due Date** and **Completed Date** for Requirements when you are not sending Requirements to an Agile tool or when you are tracking a Requirement definition progress, Requirements Date Planning.

In addition to the **Completed Date** User Defined Attribute, you can set the default status in the workflow under the **Defaults** tab.

To enable or disable the Requirement Date Planning features:

1. Log in with Server Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click the **Define UDAs** tab.
5. Select **Completed Date**.
6. Check or un-check **Enabled**.

To begin using this feature, see *Managing Requirement Date Planning*.

Organizing User Defined Attributes

You can use groups to organize how User Defined Attributes are displayed on the **Attribute** tab.

Watch how to do it: *Creating User Defined Attributes* and *Creating Attribute Groups*.

1. Log in with Server Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click the **Organize UDAs** tab.
5. Click **New Group** to create a new group or select an existing group from the list.
6. Click the **+** next to the User Defined Attribute to add to the group from the **Available User Defined Attributes** list.

Managing Users

Watch how to do it: *Creating Users* and *Adding Users to a Project*.

> **Note:** You can view the Server License Usage status for all users. If you have recently made a change, click **Refresh License Info** to update the status information.

1. Log in with Server Administrator credentials.
2. Choose a Project from the **Projects** list .
3. Click **Administration**.
4. Click **Users**.
5. Click **New User**. (To edit an existing user, select a user from the **Available Users** list and click). Enter the following details:

Logon Name	Enter the name with which the user will use to log on.
Distinguished Name	If using **Active Directory**, enter the user's **Distinguished Name**.
Password	Enter the user's password. This can be changed by the user later.
Confirm Password	Re-type the password.
Name	Enter the name of the user as you want it to appear within the system. This is the name that will appear on assigned assets.
Email Address	Enter the user's email address.

⚠️ **Important:** In order to receive email notifications from Discussions, you must enter a valid email address.

Phone Number	Optionally enter the phone number,

6. Enter the user **Privileges**:

   Check the **Server Administrator** check box to make the user a *Server Administrator*.

7. Enter the user **Login Status**:

   Check **Suspended** to lock the user out.

   If the Atlas Hub has Active Directory configured, you can use it by checking **Active Directory**.

8. Choose the License Type.

Named License	Can be used only by the user who has been assigned that license. Users who receive the named user licenses are guaranteed access.
Concurrent License	Users share the licenses and can log on as long as there are concurrent licenses available.
No License Assigned	Users without a license assigned cannot log on.

You can add as many users as you choose, but access is granted only to users with named user licenses or to users who receive concurrent licenses as they log on. If you have named user licenses, you must assign them to specific users.

Changing User's License Type

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list ☰.
3. Click **Administration**.
4. Click the **Users** tab.
5. Select a user.
6. Click the **Edit User** icon ⚙.
7. In the **License** group, select a type from the **Assigned Type** list.

Accessing Micro Focus Connect

1. Log in with Project Administrator credentials.
2. Choose a Project from the **Projects** list ☰.
3. Click **Administration**.
4. Click the **Connect** tab. The **Connect** tab opens.
5. Click **Open**. Micro Focus Connect opens.
6. For additional information on Micro Focus Connect, refer to the Micro Focus Connect documentation:
   http://documentation.microfocus.com/help/nav/5

 Watch how to do it: *Syncing Atlas & JIRA*.

Home

The Home Perspective displays the *Activity View*.

Activity View

The activity view shows the latest changes since your last login for the current Project. At a glance, you can view changes to your items, track status on Requirements and Stories, and view warnings that highlight items that Atlas has identified may need action.

The activity view is divided into the following sections:

All	Includes a flat list of items that have been created and or updated in chronological order. The provided item information is not detailed nor in any context for the item and relationships.
Concepts & Ideas	Lists new and updated Whiteboards/Concepts, as well as any discussions around them, displayed in an hierarchy.
Authoring & Definition	Displays changes targeted to the traditional Requirements user. That is, Requirement changes or additions, and discussions that may have transpired around them.
Definition Progress	Displays progress of Requirements that are being defined and have been configured for date planning.
Delivery Progress	Displays progress in Requirements delivery, in other words, the Stories. The stories are rolled up to their corresponding Requirement, keeping progress organized and easy to follow. If there are stories that do not relate to a Requirement, they are shown as Warnings.
Planning & Feedback	Displays created and updated Plans and discussions around Plans.

If you would like to open an item in your activity view, click (**Go to**) as you mouse over an item and Atlas will take you there.

Viewing Past Activity Feeds

There are times when you may want to review the updates from your Activity feed from a past date. Perhaps you were unable to give it the attention you wanted when you logged in on that particular day. To view a past Activity feed:

1. Click **HOME**.
2. Choose a Project from the **Projects** list .
3. Click calendar. The calendar appears indicating the dates where you can go back.
4. Choose a date from the calendar. The Activity feed displays the information that was on the feed on the date selected.

Gather and Share ideas

How many times have you been in a requirements planning session and used a physical whiteboard? Whiteboards help you express an idea or a concept. They use drawings and text to convey your ideas to the team. Some team members are visual and rely on drawings, while others use descriptive lists or steps.

Atlas captures all of this in the **GATHER** perspective with Whiteboards and Concepts.

- Whiteboards are containers for Concepts.
- Concepts are comprised of many forms of media: complex diagrams and work-flows, text, pictures, URLs, system files, etc.
- **GATHER** allows you to *discuss* these Concepts and collect feedback from all team members with the Discussion panel.
- You can then organize your Concepts into well-formed Requirements.

Watch the tour: *Gather Tour*.

Using Whiteboards

Whiteboards are containers that hold Concepts. Use the topics in this section to help you work with Whiteboards.

Creating a Whiteboard

All Projects contain a default Whiteboard but you can create additional ones for your Project.

Watch how to do it: *Creating Whiteboards.*

1. Click **GATHER**.
2. Click **New Whiteboard**.
3. Type the Whiteboard name in the field.
4. Click **Create**. The new Whiteboard appears in the **Whiteboard** list and is opened and ready for adding Concepts.

Editing a Whiteboard

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the selected Whiteboard.
4. Type the new name.
5. Press **Enter**.

Deleting a Whiteboard

> **Note:** You need to remove all content from a Whiteboard before you can delete it.

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click **Delete**.

Finding a Whiteboard

1. Click **GATHER**.
2. Type the name or creator of the Whiteboard in the **Find Whiteboards** field. The Whiteboards matching the search criteria appear in the **Whiteboards** list.

Working with Concepts

Concepts are assets that you add to Whiteboards to organize your ideas. A Concept can be a *Note*, *Diagram*, *Attachment*, or *Link*. Concepts can be comprised of a complex diagram, contain relationships, use discussions and versions, and can be filtered.

Use the following sections to learn more about Concepts.

Watch how to do it: *Creating a Concept* or *Tagging a Concept*.

Using Diagrams

Atlas contains native diagramming capabilities allowing you to create robust diagrams and mockups. The **Shape** gallery contains hundreds of ready-to-use shapes available for your diagram. As your diagram goes from draft to final version, you will always be able to go back and see previous versions since diagrams contain the same versioning capabilities as other Atlas assets.

Here's how you use diagrams:

- As a *Requirement Type*: When you create a Requirement, you have the option of creating a Requirement of type *Diagram*. This provides all the benefits of a Requirement with your diagram, such as: Attributes, Relationships, Versions, Tags, Attachments, and Discussions.
- As a type of *Concept*: When you create a Concept, you have the option to select the **Diagram** tab and create your diagram there.

Shapes

These are just some of the types of shapes you can use to create your diagram:

Diagrams	BPMN, UML, Flowcharts, Use Case, Lean Mapping, Process Engineering, SysML, EIP, Cisco, AWS, Azure, and more.
Mockups	Windows Applications, Internet Applications, iOS, Android.

Watch how to do it: *Using the Diagraming Feature*.

Creating a Concept Type Diagram

💡 **Tip:** You can also create a Requirement Type diagram. See *Creating a Requirement Type Diagram*.

To create a diagram in a Concept:

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Click ➕ (**Add Concept**) at the bottom of the screen. The **Create Concept** dialog box appears.
4. Click the **Diagram** tab.
5. Add a **Title**.

6. See *Using the Diagram Editor* for useful information on creating diagrams.

Using the Diagram Editor

The diagram editor contains several panels that help you to create a diagram.

Shapes Panel	Contains categories listing all available shapes.
Diagram Canvas	Contains the diagram that you are creating. Drag-drop to arrange your shapes.
Properties Panel	When you select an item on the canvas, the properties are available for editing in this panel.

Tips and Shortcuts

Copying Shapes	You can copy and paste shapes within the same canvas or into a canvas of another Requirement.
Panning	Use `CTRL + Click` (or the right mouse button) to pan the canvas.
Zooming	Use `CTRL` or `ALT + mouse-wheel scroll` to zoom the canvas in/out.
Adding Shapes	Drag a shape from the **Shapes** panel and drop it onto the canvas.
Adding Images	Drag the image from Windows Explorer and drop it onto the canvas. ✎ **Note:** You cannot copy an image and paste it onto the canvas.
Cloning Shapes	Hover over a shape until you see blue arrows appear in each direction. Click the arrow to create a connected, cloned shape. To clone without a connector, `Click+drag` the shape or click `CTRL+D`. This allows you to control the connector's length when you add it.
Connecting Shapes	Hover over a shape, then hover over the *anchor point* (x) on the edge, click and drag it to the destination.
Replacing Shapes	Drag the new shape onto the old, wait for the replace icon, and then drop the new shape.
Nudging Shapes	Select a shape, and use the keyboard arrow keys. If you hold the `Shift+Arrow` keys, you can nudge by larger steps (10 pixels)
Resizing Shapes	Select a shape. Hold down `Ctrl+Arrow` (resizes by 1 pixel). Resize the shape in larger increments (10 pixels) by using `Shift`, i.e. `Shift+Ctrl+Arrow`.
Using Text	• **Shapes**: Select a shape and just type. • **White space**: Double-click anywhere and type. • **Connector**: Select it and type.
Undoing an Action	`CTRL+Z`
Adding Image/ Hyperlink	Click the + in the toolbar.
Multi-Selecting	Hold the left mouse button down and then drag over the items you want to select. Release the button. You can also `CTRL+Click` on individual items.
More Options	Right click the canvas.

Adding Shapes to the Canvas

To add shapes to your canvas:

1. Expand the **Shapes** panel and choose the shape you want to use.
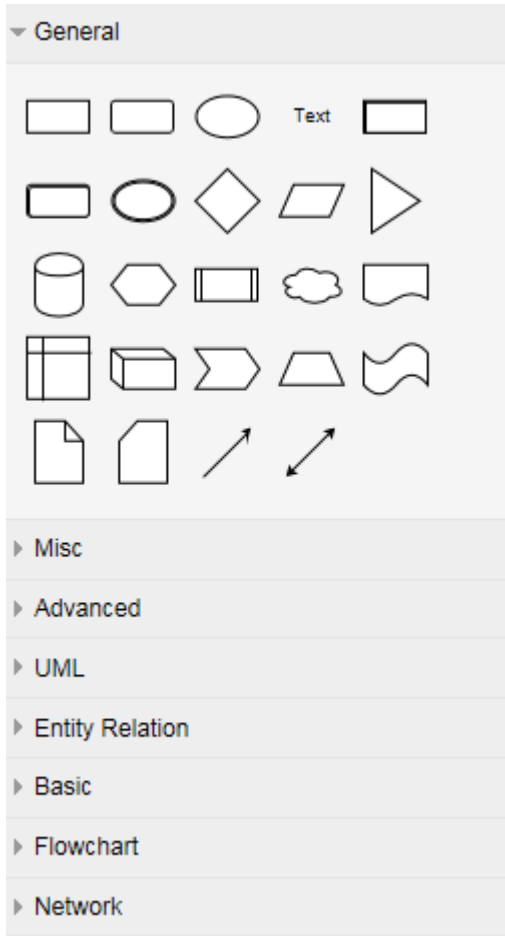
2. Either drag-drop the shape onto the canvas or double click the shape to add it to the top, left corner.
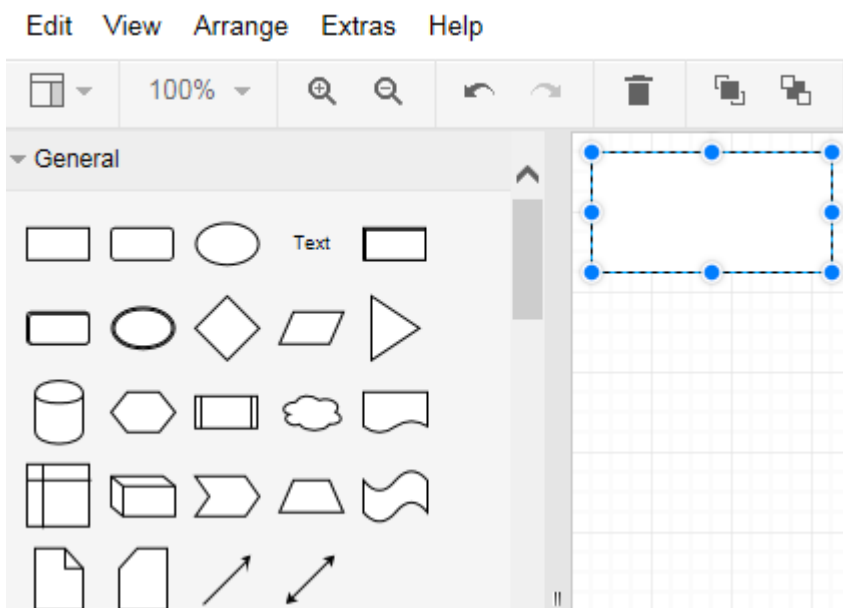
Connecting Shapes

To connect two shapes:

1. Hover over a shape to show its connection points.
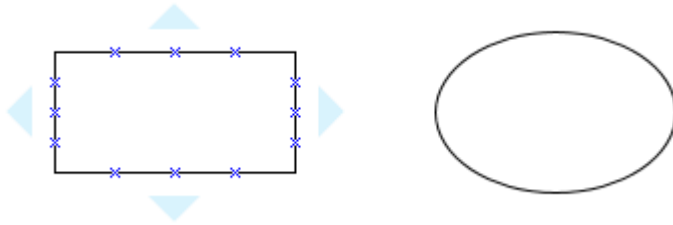
2. Put your mouse over the one you want to use and it will turn green.
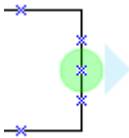
3. Click and then drag-drop the connector on the green dot of the corresponding connection point.
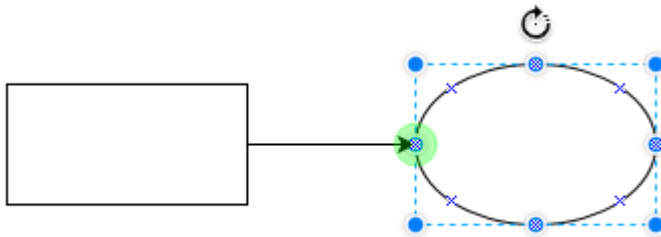
Cloning a Shape

To clone a shape:

1. Mouse over your shape to display its connection points. You will also see arrows on each side.
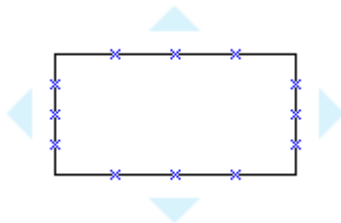
2. Click the arrow in the direction where you want the cloned shape.
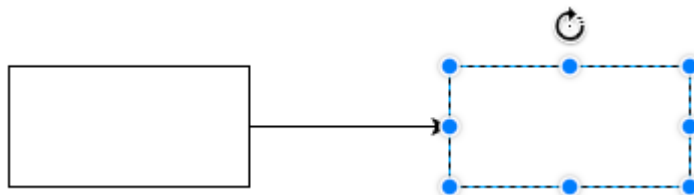
Changing a Shape Type

To change a shape from one type to another:

1. Select a shape from the gallery and drag it onto the middle of the existing shape you'd like to replace. The change icon appears:
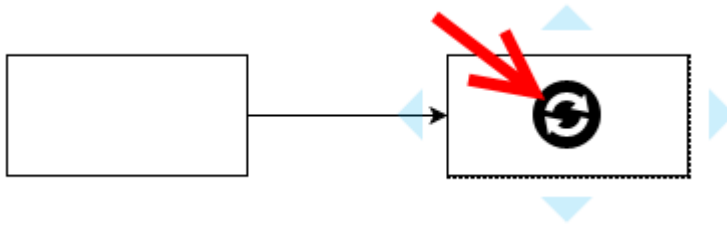
2. Drop the shape and it is replaced.
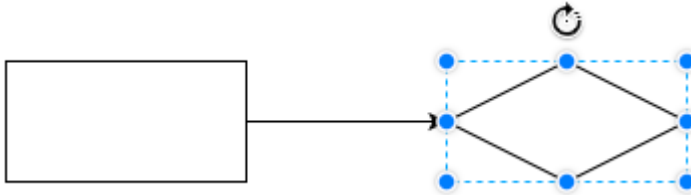
Adding Text to Shapes or Connectors

To add text to shapes or connectors:

Double click in a shape, in any white space, or on a connector line and type in your text.
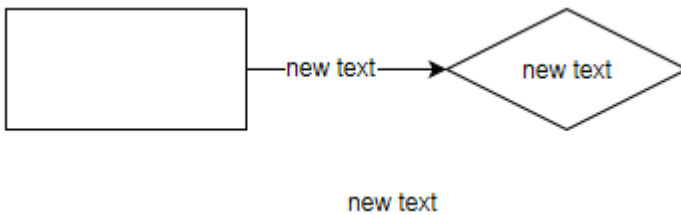
Adding Links to Shapes

To add a link (URL) to a shape:

1. Right click a shape and select **Edit Link**.
2. Enter a URL in the **Edit Link** field.
3. Click **Apply**.

A few notes on links:

- Clicking the link opens a new tab in your web browser.
- Click the pen icon to edit a link.
- Links are only visible when the item is selected.
- Links can go on shapes or connectors.

Modifying Properties of Shapes

To change an item's properties:

1. Select an item on the canvas to enable the properties panel on the right.
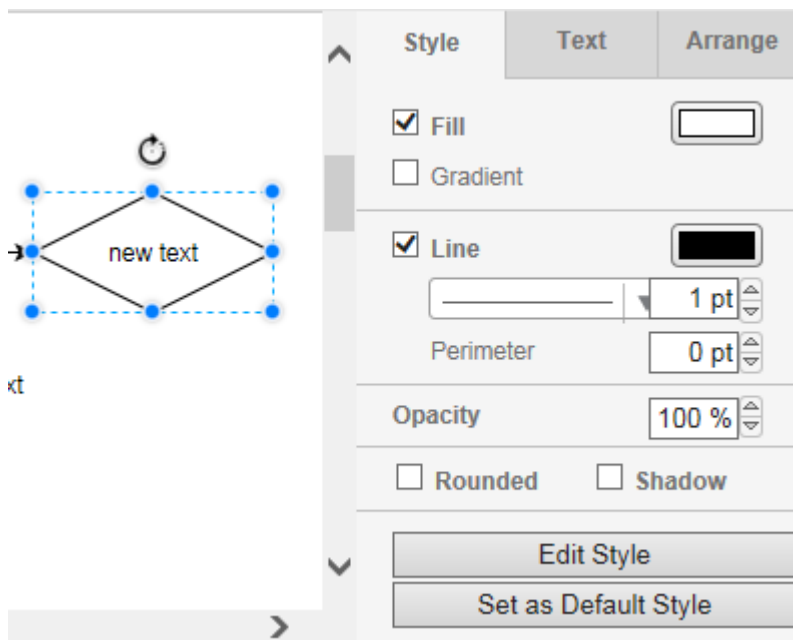
2. Use the **Style**, **Text**, and **Arrange** tabs to modify the appearance of your shape or connectors.
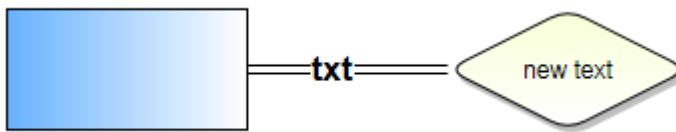
Creating Concepts

Follow the steps below to create a Concept.

 Watch how to do it: *Creating a Concept*.

1. Click **GATHER**.

2. Choose a Whiteboard from the **Whiteboard** list.

3. Click (**Add Concept**) at the bottom of the screen. The **Create Concept** dialog box appears.

4. Select one of the tabs to add that type of Concept:

Note	Allows you to type any text you want and include a rich description (including text, links, and images) for it.
Diagram	Allows you to create a diagram or mockup using all of the built-in shapes arranged by categories such as General, Misc, Advanced, UML, Entity Relation, Basic, Flowchart, Network, Azure, BPMN, AWS, Lean Mapping, iOS, Android, and more.
Attachment	Allows you to attach a file as a Concept. File types can include videos, documents, presentations, `PDF`s, and more. Enter the **File Name**, **Title** and **Description**.
Link	Allows you to add a URL. Enter the **URL** address, a **Title** and **Description**.

5. Click **Add**. The Concept is added to your Whiteboard.

Using Discussions with Concepts

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Double-click the Concept to open it.
4. Click the **Discussions** tab. The **Discussions** panel appears.
5. Type @ in the text field to open the list of team members.
6. Select the team member(s) from the list to tag them in the Discussion.
7. Type a comment in the field to start the Discussion.
8. Click **Add** to send the Discussion message. If your administrator configured email notifications, the recipient of the Discussion will receive an email with the link to the Requirement and all users mentioned in any replies receive email notification.

   Note: In order for email notification to work, all users must include their email address in their Atlas User Profile.

Creating a Relationship from a Concept

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click the **Manage relationships** icon . The **Relationships for Concept** dialog box opens.
5. Click **New Relationship**.
6. In **Add Relationships**, click the tab for the item type. The list of items appear.
7. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
8. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
9. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.
10. Select the type of relationship from the **Relationship Type** list.

    The options vary depending upon the items to which you create a relationship.

Type	Description	Available Status Values
Basic	Creates an association between two items, without status.	None.
Copy	Creates a copy relationship. Future versions of Atlas will utilize Copy relationships to further support variant and re-use scenarios. With the current version, Copy relationships behave identical to Dependent relationships and they can be used to denote items that have been derived by *Copy and Paste*, for example items copied from template structures.	Up-to-date, Deferred, Suspect.
Dependent	This type of relationship is designed to formally model a relationship of dependent items that need to be considered together.	Up-to-date, Deferred, Suspect.
Break down	Items related with a Break Down relationship receive special handling in tracking views. Downstream items will appear in both the **Tracking** tab and the **Tracking Gantt** as if they were hierarchically children of the upstream related items. All statuses will also roll up. There is some	Up-to-date, Deferred, Suspect.

Type	Description	Available Status Values
	logical overlap between `Dependent` and `Break down` relationships but in general `Dependent` relationships *influence* items while `Break down` items represent the same thing as the *From* item(s) but on lower, more detailed level.	

11. Click **OK**.

Downloading Concept Files

Some types of system files cannot be viewed directly in Atlas, such as Microsoft Power Point and Excel files. You will need to download the files to view them.

1. Click **GATHER**.

2. Choose a Whiteboard from the **Whiteboard** list.

3. Double-click the Concept to open it. The selected Concept opens. If the file cannot be viewed within Atlas, the message `This Concept can't be viewed within Micro Focus Atlas. You can download it instead` appears.

4. Click **download it instead** to save the file. If you have the appropriate application, you can choose to open the file in the application. If you choose to save the file, the downloaded file name is saved with the original file name.

Emailing a Concept to the Inbox Whiteboard

The project administrator must create an email account and configure Atlas to connect the email account with the Inbox Whiteboard.

Sometimes an idea occurs at the most inopportune times. For example, you may be out getting a cup of coffee and you sketch your idea on an napkin. You can snap an image of that napkin with your phone and email it directly to an Atlas **Inbox** Whiteboard.

1. Attach an image or write an email and address the email to the address your project administrator created.

2. Send the email.

3. Log into Atlas.

4. Open the project.

5. Click **GATHER**.

6. Open the Whiteboard named **Inbox**. The latest email appears in the upper left corner. From here you can start a Discussion, move the Concept to another Whiteboard, or associate it with another Concept, Story, or Requirement.

Saving Concepts as Requirements

1. Click **GATHER**.

2. Choose a Whiteboard from the **Whiteboard** list.

3. Choose a Concept.

4. Click **New Relationship**.

5. Click **New Requirement**. The **Create Requirement** dialog appears.

6. Select a Requirement Type from the list and rename if you like.

7. Click **Save & Close**.

Here is the result for each type of Concept:

Note	The new Requirement name is the Note's name.
	The Requirement **Description** is the Note Description.
Diagram	The new Requirement name is the Diagram's name.
	The Requirement **Description** contains the diagram that you can edit.
Attachment	The new Requirement name is the Attachment's name.
	The Requirement **Description** contains the Attachment's Description, and the attachment is located in the Requirement's **Attachment** tab.
Link	The new Requirement name is the Link's name.
	The Requirement **Description** contains the URL and then the Concept description.

Importing a Concept to Create a Requirement

If your Concept is a Microsoft Word DOCX document, you can import the concept to create a Requirement. Atlas reads a Word document and creates Requirement names from headings. The text directly beneath headings is converted into the Requirement descriptions. Hierarchies are not preserved from importing from headings to Requirements.

1. Click **GATHER**.
2. Choose a Whiteboard from the **Whiteboard** list.
3. Choose a Concept.
4. Click ⬚ **New Relationship**.
5. Click the **Import** tab.
6. Click **Generate**.

Define and Scope Your Requirement

Requirements define how you want to change your application. They should be defined such that the people involved in planning, building, testing, delivering, maintaining, and using the application can clearly understand what needs to be done.

The **DEFINE** perspective provides two ways to view Requirements:

💡 **Tip:** In both views, click ↻ (refresh) to refresh the view with the latest updates.

Tree View 🗎

Contains the hierarchical tree view of your Requirements. You can select a Requirement in the tree and then select one of it's fields to edit them.

💡 **Tip:** In the Requirement tree, click ⚙ next to the Requirement for additional actions such as **Breakdown**, **Send to Backlog**, **Delete**, etc.

💡 **Tip:** In the Requirement , click ⊞ to show the Requirement ID in the Requirement tree.

Grid View ☰

Use this view to display all Requirements in a list. To customize the columns that appear, right-click in the header row and select the column you want to appear in the grid.

💡 **Tip:** Click ⚙ **Actions** as you mouse over a Requirement and select **Open** to open the item in another window.

You can also select a Requirement and view its description in the lower pane of the **Grid View**.

Atlas retains your settings such as, adding columns, changing column sizes, and sorting order.

Use the following sections to learn about Requirements.

Watch a tour of the perspective: *Define Tour*.

Relationships

Atlas uses Relationships to help you understand how different items are connected. Changing an object may have implications on other elements of the Project. For example, changing a Requirement that has already been pushed as a Story in your Agile planning tool might change the scope or complexity of the Story. Relationships are supported to allow you to see the connection between Requirements and other related assets. Linking related objects together helps to ensure that changes are implemented correctly at all levels.

Atlas provides the following Relationships:

- Requirements with Stories, Whiteboards, Concepts, Atlas Hub items, and Requirements in different projects.
- Concepts with Stories, Atlas Hub items and Concepts in different Whiteboards.
- Whiteboards and Stories.

You can create relationships manually in Atlas through the **Relationships** tab in the **Requirement** editor. Atlas Hub items are located in the **Other** tab. Atlas Hub items include Agile planning, testing, defect tracking and Microsoft Office tools.

Atlas also creates some Relationships automatically for you. Whenever you push Requirements to the Backlog in your Agile planning tool, Atlas creates a Relationship between the Requirement and the Story it creates on the Backlog. You can also relate a Requirement to a Story that already exists. As well as helping you understand the Relationship between the Requirement and the Story, Atlas also uses the Relationship to track the progress of the Story.

The following lists the types of relationships used within the Atlas Planning and Tracking Suite:

User Managed/Created	`Basic`, `Copy`, `Dependent`, `Requirement Stream`, and `Requirement Synchronization`.
Application Managed/ Created	`Carry Over`, `Defect Stream`, `Execution` (relationship between a Story and a Sprint, for example) , `Parent-Child`, and `Requirement Stream`.

Relationship Status

Each relationship type may have various statuses. When a change is made to an item with a Relationship, the relationship status changes to **Suspect**. You can view the change and update the status to bring it up-to-date, or you can **Defer** the update. If you defer, the status of the Relationship changes to **Defer**.

⚠️ **Important:** For all Relationships, except for synchronizations, changing the status does not change the items. The status acts as a label to help you find what you've reviewed and what you need to review. For example, updating the status changes the status to **up-to-date** but does not make any changes to the target item details.

Watch how to do it: *Create a Relationship*.

Visualizing Relationships

Relationships are accessed from the **Relationships** tab and appear in a list. In certain perspectives, you can view your relationships in a diagram. When you see [Diagram] above the **Relationships** list, click it to open the **Relationships Diagram** window. Here's how it works:

- Items to the left of the Requirement link *to* the Requirement. Items to the right of the selected Requirement link *from* the Requirement.
- The diagram displays an item's first level relationships. Items with child relationships contain a solid blue dot. You can click and navigate to all relationship levels. Cross-project relationships links (where the Requirement is in another project than the current one) are indicated with a dashed line.
- Select an item and you will see summary information on the top of the window.
- Click (**Goto**) to go to the item in a new browser window/tab.
- The diagram is an infinite scrolling canvas that can be panned via click and drag, and zoomed via the scroll wheel.
- Click **Reset** to restore the default pan/zoom.
- Click **Reload** to refresh the diagram.
- Although item names are fixed-length on the diagram, hovering over an item displays a tool-tip with an asset's full Name, ID, Type, and Project Name.
- Select a **Relationship Status**, **Relationship Type**, or **Item Type** to filter the diagram based on your selections.

Relationship Diagrams have indicators to help determine relationship and status at a glance:

- Green lines indicate an `Up-to-Date` relationship.
- Red lines indicate a `Suspect` relationship.
- Orange lines indicate a `Deferred` relationship.
- Gray, solid lines indicate a parent-child relationship.
- Dashed lines indicate a relationship with an external project (cross-project).
- Solid lines indicate a relationship within the current project.

Additionally, if you hover over the connecting lines, status and details appear.

Relationship Diagram Example
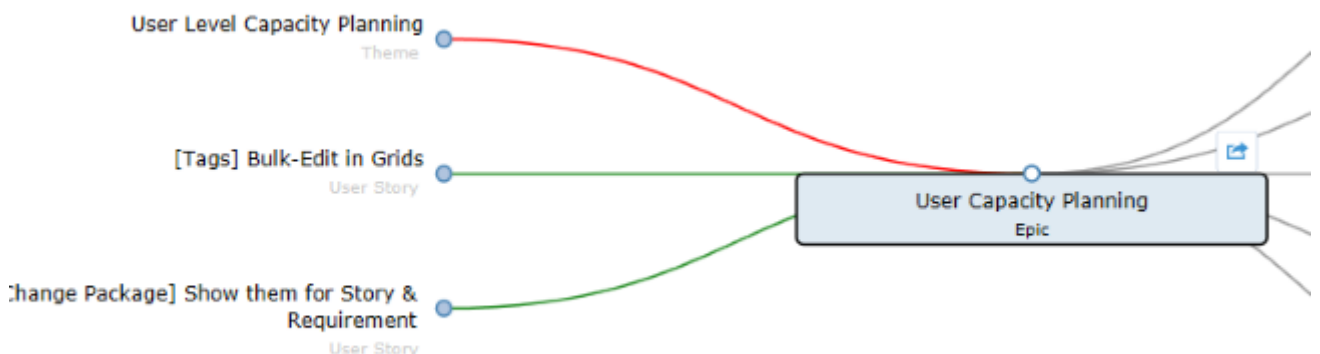
Viewing Status and Details of Relationship Items

You can view the status or detail of an item with a Relationship. Atlas items display status of Requirements or Stories. Atlas Hub items display according to the defaults or, in the case of custom Atlas Hub items,

according to what the administrator created. Atlas Hub items are displayed in the **Other** tab and are organized in folders and files in a file explorer format.

1. Click the **Relationship** tab . The **Relationship** pane appears.
2. Scroll through the **Existing Relationships**. Each Relationship shows the status or details.

    Note: Select the status from the **Relationship Status** list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** list to group relationships.

Table 1: Relationship Items

Icon	Type	Description
</>	Change Package	A collection of changes from your SCM tool related to a commit.
⇆	Change Request	An Atlas Hub generic Request object.
⬚	Code Review	A Rhythm Code Review.
N/A	Concept	An Atlas Concept
🗎	File	A reference to a file.
▥	Kanban Board	A Rhythm Kanban Board.
N/A	Plan	An Atlas Plan.
◈	Requirement	An Atlas Requirement.
N/A	Release	A Rhythm Release.
⚴	Sprint	A Rhythm Sprint.
⑀	Story	A Rhythm Story.
☑	Task	A Rhythm Task.
N/A	Test	An Atlas Hub Test object.
☐	User Defined Type	A custom type defined in the Atlas Hub.
⌂	Whiteboard	An Atlas Whiteboard.

Creating a Relationship from a Requirement

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Choose a Project from the **Project** list.

    By default, the current Project is listed.
5. Click **New Relationship**.
6. In **Add Relationships**, click the tab for the item type. The list of items appear.
7. Optional: Type the name of the Requirement, Story, or Concept in the **Find** field.
8. Select the item from the list and click **Add**. The **Relationship Type & Direction** dialog appears.
9. Click the arrow to create a **to** or **from** relationship between the item you are currently in and the item you selected.

10. Select the type of relationship from the **Relationship Type** list.

The options vary depending upon the items to which you create a relationship.

Type	Description	Available Status Values
`Basic`	Creates an association between two items, without status.	None.
`Copy`	Creates a copy relationship. Future versions of Atlas will utilize `Copy` relationships to further support variant and re-use scenarios. With the current version, `Copy` relationships behave identical to `Dependent` relationships and they can be used to denote items that have been derived by *Copy and Paste*, for example items copied from template structures.	Up-to-date, Deferred, Suspect.
`Dependent`	This type of relationship is designed to formally model a relationship of dependent items that need to be considered together.	Up-to-date, Deferred, Suspect.
`Break down`	Items related with a `Break Down` relationship receive special handling in tracking views. Downstream items will appear in both the **Tracking** tab and the **Tracking Gantt** as if they were hierarchically children of the upstream related items. All statuses will also roll up. There is some logical overlap between `Dependent` and `Break down` relationships but in general `Dependent` relationships *influence* items while `Break down` items represent the same thing as the *From* item(s) but on lower, more detailed level.	Up-to-date, Deferred, Suspect.

11. Click **OK**.

Updating Relationship Status

1. Click the **Relationship** tab 🔷 . The **Relationship** pane appears.

2. Scroll through the **Existing Relationships**. Each Relationship shows the status or details.

> ✏️ **Note:** Select the status from the **Relationship Status** list to filter the list based on status or select Project, Relationship Type, Artifact Type, or Direction from the **Group By** list to group relationships.

3. Click **...** and choose to **Update** or **Defer** suspect relationships.

For more information, see *Relationship Types and Statuses*.

Relationship Types and Status Values

The following table shows the types of relationships that are available.

Type	Description	Available Status Values
`Basic`	Creates an association between two items, without status.	None.
`Copy`	Creates a copy relationship. Future versions of Atlas will utilize `Copy` relationships to further support variant and re-use scenarios. With the current version, `Copy` relationships behave identical to `Dependent` relationships and they can be used to denote items that have been derived by *Copy and Paste*, for example items copied from template structures.	Up-to-date, Deferred, Suspect.

Type	Description	Available Status Values
Dependent	This type of relationship is designed to formally model a relationship of dependent items that need to be considered together.	Up-to-date, Deferred, Suspect.
Break down	Items related with a `Break Down` relationship receive special handling in tracking views. Downstream items will appear in both the **Tracking** tab and the **Tracking Gantt** as if they were hierarchically children of the upstream related items. All statuses will also roll up. There is some logical overlap between `Dependent` and `Break down` relationships but in general `Dependent` relationships *influence* items while `Break down` items represent the same thing as the *From* item(s) but on lower, more detailed level.	Up-to-date, Deferred, Suspect.

All relationships except **Basic** share the behavior that when the *From* end is updated, the status goes to `Suspect`.

Break Down brings the *To* ends into the Tracking views for the *From* ends.

Status Actions

Deferred When a relationship is in this status, the available actions are `Compare`, `Update` and `Remove Relationship`.

Suspect When a relationship is in this status, the available actions are `Compare`, `Update`, `Defer` and `Remove Relationship`.

Discussions

Discussions allow you to share ideas and have in-depth conversations using *Topics*. These Topics allow team members to provide feedback via **Agree/Disagree** icons as well as responding directly to the Topic via messages. When the all of the team's feedback is provided, the Topic can be `Accepted` or `Rejected`. Until then, it is in the *Open* state.

Note: The highlighted number next to the Discussion icon represents the number of Open Topics in the Discussion.

- A Discussion can contain multiple Topics.
- A Topic contains feedback in the form of:

    - Textual messages via **Reply** .
    - **Agree/Disagree** (and) click responses.
- A Topic is in the `Open` state until you `Close` it via **Accept** or **Reject**. You could re-open it later.
- When replying to a Topic, if you want to notify someone, use the @ symbol and select a user from the list provided. Note the following:

    - The @ symbol can be used multiple times to address a message to multiple users.
    - The @ symbol causes emails to be sent to all listed users (if email integration has been enabled in the Atlas Hub).
    - A reply will message the user that started the topic, all of the users that have posted a reply to the topic, and any users mentioned anywhere in the discussion thread.

Topic Life Cycle Diagram
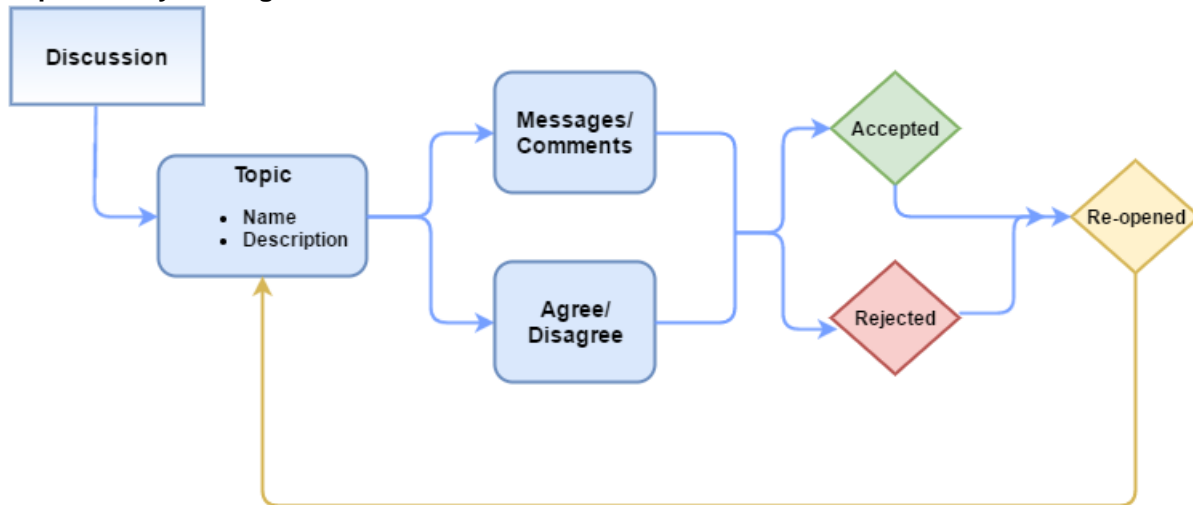
Discussions are available in the following locations:

- **Home**: Activity view.
- **Plan**: open a Plan and click **Open Review**.
- **Discussions** tab: for most other assets (Concept, Requirement, etc).

▷ Watch how to: *Start a Discussion*.

Using Discussions with Requirements

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Discussions** tab. The **Discussions** panel appears.
4. Type @ in the text field to open the list of team members.
5. Select the team member(s) from the list to tag them in the Discussion.
6. Type a comment in the field to start the Discussion.
7. Click **Add** to send the Discussion message. If your administrator configured email notifications, the recipient of the Discussion will receive an email with the link to the Requirement and all users mentioned in any replies receive email notification.

   Note: In order for email notification to work, all users must include their email address in their Atlas User Profile.

Starting a Discussion Topic

From anywhere in Atlas where Discussions are available, in the **Discussions** pane:

▷ Watch how to do it: *Start a Discussion*.

1. Click **New Topic**.
2. Type a title in the **Subject** field.
3. Write a comment in the **Text** field.
4. Type @ in the text field to open the list of team members.
5. Click **OK**.

Replying to a Discussion from the Activity Feed

If you have been tagged in a Discussion or if you have a Project listed as a favorite on your **Activity** view, you will receive a notification that there is an unread Discussion topic.

1. Click **HOME**.
2. Click the Project with the notification badge next to it. Activities for the Project appear in the **Activities** pane.
3. Click the **Quick Look** 👁 icon next to the Discussion. The **Discussions** view appears, opened to the discussion topic selected from the **Activities** feed.
4. Click ↩. The reply field appears.
5. Type a reply and click **OK**.

Closing Discussion Topics

After a Discussion Topic has run it's course and team members have come to a resolution, you can close a topic with **Accept** or **Reject**. Click the down arrow next to the reply and select **Accept** or **Reject**. This closes the topic and the team can no longer reply. However, the topic can be expanded or collapsed for viewing.

Viewing Versions

Atlas tracks the changes made to most of its assets.

1. Open the appropriate perspective.
2. Open the item.
3. Click the **Version** tab.
4. Select the version you want to view. The selected version appears in the dialog box.

Viewing Requirement Versions

Each Requirement contains a detailed history of its versions. The history assigns version numbers and keeps a list of when the change was made and who made the change. To view the history of a Requirement:

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab. Each version in the list contains the following fields:

Version	When a change is made, the version number is automatically updated. The change may cause a major or minor revision number change. An administrator determines this when attribute types are defined.
Modified Time	The date and time the change was made.
Modified By	The name of the person who made the change.

4. Select a version.

Comparing Versions of a Requirement

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Requirement:

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Versions** tab.
4. Select a version.
5. `Ctrl+click` another version. The **Compare** button is enabled.
6. Click **Compare**. The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, **Extended Attributes**, etc) and displayed in a tree list.
7. Double click the **Description** field to view detailed differences in a new window. The **Detailed Differences** window shows exact text changes of the Requirement description.
8. Click **Options** > **Only show differences** to hide all items that haven't changed.
9. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

Comparing Versions of a Story

The *Compare* feature allows you to select two assets of the same type and compare the changes in the fields between the two different versions.

To compare two versions of a Story:

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Relationships** tab.
4. Click the **Story** tab.
5. Click (**Quick Look**) next to the Story.
6. Click the **Versions** tab.
7. Select a version.
8. `Ctrl+click` another version. The **Compare** button is enabled.
9. Click **Compare**. The **Compare Versions** dialog box opens with columns detailing each version of the asset. The fields that you can compare are grouped by various types (**System**, **Description**, **UDAs**, **Extended Attributes**, etc) and displayed in a tree list.
10. Click **Options** > **Only show differences** to hide all items that haven't changed.
11. Click **Options** > **Extended Attributes** to show various other fields that may have changed.

Restoring to a Version

At times, you may want to return to previous versions of a Requirement. Restoring a previous version only restores the description, name, and attributes. Relationships, discussions, attachments, and tags are retained from the current version.

1. Open the appropriate perspective.
2. Open the item.
3. Click the **Version** tab.
4. Select the version you want to restore.
5. Click **Actions**.
6. Choose **Restore to Current Version**.
7. Confirm that you want to restore the version.

A new version is created with the selected version's information.

Synchronizing Requirements Overview

Many times the same Requirements are used for multiple Projects. Atlas provides the ability to reuse requirements by defining them once centrally, and connecting (synchronizing) them with other Projects. As related items are modified, individual item updates can be accepted, deferred or declined. This granular management ability provides consuming projects the ability to not only reuse centrally defined requirements, but to manage the flow and impact of changes.

The Requirements are synchronized to define the shared Requirements relationship. A synchronized Requirement is one whose description is linked to a shared requirement.

The Synchronization Source is the Requirement that provides the originating material. Any Project contributor where the Requirement resides can edit the Requirement.

The Synchronization Destination is the Requirement that displays the content of the Synchronization Source.

Requirements that have been synchronized are designated by the ⛭ icon in the Requirements Tree.

Synchronizing Requirements

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.

   This is your Synchronization Destination Requirement. You will pull the content from your Synchronization Source Requirement into this Requirement.
3. Click ⚙ **Actions**.
4. Select **Synchronize with Requirement**. The **Synchronize with Requirement** dialog appears.
5. Choose the **Project** in which the Synchronization Source resides.
6. Choose a Requirement from the **Requirements** list.

   This is your Synchronization Source Requirement.
7. Click **Synchronize**. The description from the Synchronization Source is propagated into the Synchronization Destination. The description in the Synchronization Destination cannot be edited.

You cannot link a Synchronization Source Requirement to a Synchronization Destination Requirement that is already synchronized to another Synchronization Source Requirement.

Removing Requirement Synchronization

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click ⚙ **Actions**.
4. Select **Remove Requirement Synchronization**. The description remains, but is now editable. Any changes made in the Synchronization Destination or in the Synchronization Source will not affect each other.

Updating Requirement Synchronization

When the Status is out-of-date, you can choose to update the Synchronization Destination with the contents of the Synchronization Source.

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click ⟨ or click **Relationships** tab.

4. Click ✅ next to the Synchronization Source in the Synchronization Source Pane. The **Sync Status** changes to **Up to date** and the Synchronization icon changes to ⤬, indicating that the Requirements have been updated and are now current.

Deferring Requirement Synchronization

When the Status is out of date, you can choose to Defer the Synchronization. The Synchronization Destination continues to show outdated information until you decides to update.

1. Click **DEFINE**.

2. Choose a Requirement from the **Requirements** list.

3. Click ⤬ or click **Relationships** tab.

4. Click 🕐 next to the Synchronization Source in the Synchronization Source Pane. The **Sync Status** changes to **Deferred** and the Synchronization icon changes to ⤬. You can update the Synchronization at any future time.

Comparing Synchronized Requirements

You can compare deferred or out-of-date synchronized requirements. The comparison displays the last synchronized version of the Synchronization Source and the most recent revision.

1. Click **DEFINE**.

2. Click **...** and choose **Manage Synchronizations**. The **Synchronized Requirements Manager** appears.

Or you can select a requirement and click the **Relationships** tab.

3. Click 🔲. The **Compare Versions** dialog appears.

Synchronization Status Icons

The table below describes what each icon represents in the Synchronization Status. Hover over the icon to view details. Click the icon to open the Relationships tab.

Icon	Name	Description
⤬	Not Synchronized	The Requirement is not synchronized.
⤬	Up-To-Date	The Synchronization Destination displays the same content as the Synchronization Source.
⤬	Deferred	The Synchronization Destination displays older content than the Synchronization Source. The user has selected to defer updating content.
⤬	Out-Of-Date	The Synchronization Destination displays older content than the Synchronization Source.

Managing Synchronized Requirements

To view all synchronized requirements for a project, use the **Synchronized Requirements Manager**.

1. Click **DEFINE**.

2. Click **...** and choose **Manage Synchronizations**. The **Synchronized Requirements Manager** appears.

The **Inbound** tab lists all the Synchronization Destinations for the project in the first column. The **Outbound** tab lists all the Synchronization Sources within the project in the first column. You can navigate the tabs depending upon what type of requirement you want to search.

3. Choose a **Sync Status** from the drop-down to narrow the list according to the status you choose.

4. Accept, defer, or update synchronizations on the **Inbound** tab.

Importing and Exporting Requirements

Use the topics in this section to learn about importing and exporting Requirements.

 Watch how to do it: *Import/Export Requirements*.

Importing a CSV File to Create a Requirement

If your file is a `CSV` document, you can import the file to create requirements.

Atlas reads a `CSV` file and creates requirement names from the file. The `CSV` has to be in the appropriate format for Atlas to parse the information correctly. The headers names must exactly match the Atlas Hub headings.

1. Click **DEFINE**.
2. Click (**Tools**) and select **Import**. The **Import Requirements** dialog box appears.
3. Click **Select** and navigate to the file to import.
4. Click **Import**. The information from the file is converted into Requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

> The following image is an example of the proper `CSV` format.
>
> | | A | B | C | D | E | F | G | H |
> |---|---|---|---|---|---|---|---|---|
> | 1 | ID | ParentRequireme | Name | Type | MoSCoW | RichDescription | RequirementO | ExpectedEff |
> | 2 | 1 | | Policy Management | Theme | Must Have | Requirements fc | 1 | 3 |
> | 3 | 2 | 1 | Add Vehicle Endorse | Initiative | Must Have | Types of Vehicle | 2 | 1 |
> | 4 | 3 | 1 | Income protection Ii | Initiative | Should Have | Customers want | 3 | 1 |
> | 5 | 4 | 2 | Add add Boat Policy | Feature Require | Could Have | Boat insurance h | 4 | |
> | 6 | 5 | | Payment | Theme | Must Have | Add additional P | 5 | 3 |
> | 7 | 6 | 5 | Credit Cards | Initiative | Must Have | Support for diffe | 6 | 2 |
> | 8 | | | | | | | | |
>
> Items with a `ParentRequirementID` are created as children of the items with the same `ID`. Using the example image, items with `ParentRequirementID` of `1`, Add Vehicle Endorsement Types and Income protection Insurance, are created under `Policy Management`.

Importing a Word Document to Create Requirements

If your file is a `DOCX` document, you can import the file to create Requirements.

Atlas reads a `DOCX` file and creates Requirement names from the file. The `DOCX` file has to be properly formatted for Atlas to parse the information correctly.

- `Heading 2` becomes the Requirement name.
- URLs are carried into the Requirement and are fully functional.
- Bullets, multiple columns, bold, italics, and indenting are flattened in the description of the Requirement.

Word documents do not map to other fields like a CSV file does. Import from Word reads headers and uses them as titles for Requirements. Everything else is placed in the Requirement description. The fields in the Requirement are set to their defaults.

1. Click **DEFINE**.

2. Click ⚙ (**Tools**) and select **Import**. The **Import Requirements** dialog box appears.

3. Click **Select** and navigate to the file to import.

4. Click **Import**. The information from the file is converted into Requirements and listed in the **Requirements Tree**. A report appears if there are any import errors or if the import failed due to the errors.

Below is an example of a well-formed Word document:

Material Requirements Planning (MRP)

Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the **bridge between master planning and production**. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).

Participants analyze the sources of information needed to perform MRP and discuss the steps in **developing, accepting and executing a material requirements plan**. The hands-on exercise reinforces the understanding of the MRP logic.

The course covers

- Planning hierarchy
  - Sales and Operations Planning (S&OP)
  - Resource Planning
  - Master Production Schedule (MPS)
  - Rough Cut Capacity Planning
  - Material Requirements Planning (MRP)
  - Capacity Requirements Planning (CRP)
  - Order release
  - Input/output controle
  - Feedback (close loop)

- Input for MRP
  - Item master data
  - Lotsize parameters: LFL, POQ, EOQ
  - Planning parameters and planning cycle
  - Bill of Material
  - Routings
  - Planning BOM
  - Safety stock and customer service
  - Forecast and demand managemen

- MRP logic
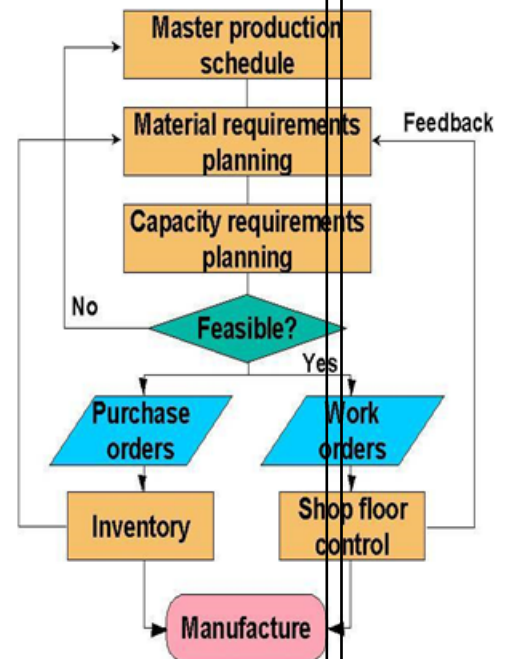
When imported into Atlas, the Requirement is created as follows:

Material Requirements Planning (MRP)

Owner:	Not Assigned	ID:	4147	Status:		
Type:	Customer Story	Revision:	1.0		**Draft**	
Priority:	Could Have	Modified:	Jun 1, 2015, 12:07 pm	Rank: 999		Estimate: 0

To begin editing this requirement, double-click its description or click on the field you'd like to change.

Delivery Status
Not Shared

Material Requirements Planning (MRP) is a set of techniques that calculates requirements for components. MRP is the bridge between master planning and production. MRP creates a time-phased plan that determines what components are needed to make a product and when. This course provides you with the definition, the basic characteristics and the functions of MRP and its relationship to master planning and production activity control. It also explains the theory for understanding MRP in the framework of Manufacturing Resource Planning (MRP II) and Enterprise Resource Planning (ERP).

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The course covers

Note that the bold text is now in a standard font. Additionally, the graphic is dropped below the paragraph instead of aligned in a second column next to the text. If you were to scroll further down, the bulleted text will appear on one level with no bullet points in front of the text items, as follows:

Sales and Operations Planning (S&OP)
Resource Planning
 Master Production Schedule (MPS)
 Rough Cut Capacity Planning
 Material Requirements Planning (MRP)
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Safety stock and customer service
Forecast and demand managemen
MRP logic
Validation and uses of the MRP plan
On hand / available/ allocation/
Backflushing
Pegging / Where used
Firmed planned orders
Cycle counting
Available to promise

Exporting to a CSV File

You can export Requirements into a `CSV` file in order to create your own documents for presentations or reports. You can also use the export to then import the Requirements into a different project.

1. Click **DEFINE**.
2. Select the Requirements you would like to export.
3. Click ☰ (**Tools**) and then select **Export**. The Requirements are exported to a `CSV` file in the default download directory of your browser. For example: `C:\Users\{userid}\Downloads`. The columns in the `CSV` match the order of the **Requirement Grid**.

Atlas provides a link to each original requirement in the last column of the exported CSV file. Copy and paste the link into a browser to navigate back to the requirement in Atlas.

Exporting to a CSV File from the Requirements Grid

Exporting to a CSV file from the Requirements Grid offers more control over the information included in the exported file than exporting from the Requirements Tree. The exported file maintains the filters, column selection, column order, and sort order of your Requirements Grid.

> ✎ **Note:** The only exception with column order is if **ID** is the first column in your grid. Microsoft Excel does not accept the characters "ID" in the first column. If **ID** is your first column, the export moves **ID** column to the second column in the CSV file.

1. Click **DEFINE**.
2. Click the **Grid View** (⦙☰).
3. Ensure that the filter, columns, and sort order contain the items you want to export.
4. Click ⬆ (export). The Requirements are exported to a `CSV` file in the default download directory of your browser. For example: `C:\Users\{userid}\Downloads`.

Managing Requirement Date Planning

Agile teams move quickly, incrementally adding new capability sprint after sprint. The agile delivery team is dependent on requirement information to assure priorities/expectations are clearly understood upfront. When the project milestone planning (content, priority, purpose, and timing) side is not ready, the delivery team is left to make assumptions to fill in the gaps. This practice can lead to misaligned expectations and rework. Those on the business side need to align their milestone planning with the delivery team's sprints.

Atlas Requirement Date Planning enables Atlas users to define specific definition dates for features, and measure/track against those time-frames. By defining and tracking the project milestones, Atlas users can align their work with the delivery team, assuring business needs are available when requested by engineering.

Enabling Requirement Date Planning

Atlas provides the ability to define due dates for the definition of requirements, and to measure progress against those defined dates. *Requirement Date Planning* enables users to plan their definition work to align with internal milestones, or agile delivery team cadence.

To enable Requirement Date Planning, the Project Administrator adds the pre-defined UDA group **Requirement Date Planning** to any Requirement type. After it is added, all Requirements of that type will participate in a special workflow to assist in tracking definition progress. For more information, see *Enabling Requirement Date Planning*.

By adding the **Requirement Date Planning UDA** group to a Requirement type, Requirements of that type list **Due Date** and **Completed Date** in their attributes.

The Requirement information pane will also display an indicator flag alerting the user to progress against the defined due date.

Requirements participating in this workflow will display progress against those dates in both the **Definition Progress** area of the home activity screen and the tracking Gantt.

Entering Due Date or Completed Date

The System Administrator must enable the **Due Date** and **Completed Date** User Defined Attributes.

To set a Due Date or to mark when a requirement is completed:

1. Click **DEFINE**.
2. Select the Requirement.
3. Click the **Attributes** tab.
4. Navigate to the **Requirement Date Planning** section.
5. Click **Due Date** or **Completed Date** to activate the field.
6. Type the date or click the ▦ to select a date.

Setting Status for Requirements Date Planning

You can manually update the status of a requirement. When updating the status in a Requirement, the Completed and Target Date User-Defined Attributes are accessible.

1. Click **DEFINE**.
2. Select the Requirement.
3. Click the **Status**. A list appears with all the possible status that your administrator created.
4. Select a status.
5. Click the **Attribute** tab to enter the information associated with the status.

Requirement Flag States

The following table describes the various flag states for Requirements Date Planning.

Flag	Name	Description
	No Attribute	If the Requirement does not have a Target Date or Completed Date UDA, no flag icon displays.
⚑	Not Set	Requirement does not have a Target Date. Click to add one. This flag does not appear in the Gantt chart.
⚑	Due Soon	Requirement has a target date and it is less than 7 days from today.
⚑	Late	Requirement has a target date and it's past due and is not completed.
⚑	Tracking	Requirement is tracking as scheduled.
⚑	Due Today	Requirement is due today.
⚑	Completed on Time	Requirement has a Completed Date entered before or on the Target Date.
⚑	Completed Late	Requirement has a Completed Date entered after the Target Date.

Viewing Requirement Definition Status within Requirement

To view a Requirement Planning Date status in the Define view:

1. Click **DEFINE**.
2. Select the Requirement. Under the **Priority** field, you will see a status flag. Each flag represents the state of the Requirement. See *Requirement Date Planning Flag States* for descriptions of each flag.
3. Hover over flag to view details.

Requirement Status

In Atlas, you cannot modify the **Status** of Agile Requirements. The value is taken from the value of the related Stories. For Requirements definition date planning, you can manually select a **Status** value.

Use the following topics to work with the **Status** field.

Viewing Status for an Agile Requirement

You can view a plan's status in the **TRACK** perspective. However, you may only be interested in the status of a single Requirement. You can view a per-Requirement status from the **DEFINE** perspective.

To view the status of a Requirement:

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Review the status in the **Delivery Status** section. The data also includes the detail for child Requirements.

Creating a Requirement

The administrator must have associated Requirement Types with the Project before you can create Requirements.

▷ Watch how to do it: *Creating Requirements*.

1. Click **DEFINE**.
2. Click (**Create new Requirement**).

   To create a child Requirement, select the Requirement in the list, and click **Create new Requirement** > **Create Above...** or **Create new Requirement** > **Create Below...**.

   The **Create Requirement** dialog box appears.
3. Choose a Requirement Type from the list.
4. Type a title for the Requirement in the **Title** field.
5. To continue adding Requirements, press `Enter`. The **Create Requirement** dialog remains open and ready for the next Requirement.
6. Click **Save and Close** to save the Requirement and close the dialog or **Save and New** to save the Requirement and leave the dialog open to create another Requirement.

Editing a Requirement

Use the steps below edit a Requirement.

Watch how to do it: *Edit a Requirement*.

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the editable fields to make them active.

   The **Title**, **Owner**, **Type**, **Rank**, **Priority**, **Estimate**, and **Description** can be changed.
4. Click **Save**.

Editing Multiple Requirements in the Requirements Grid

When there are multiple requirements needing the same edits, the **Requirements** Grid provides an easy way to select a group of requirements and make the change once.

When editing requirements, a lock is placed on the requirement(s), preventing other users from accessing them. Activate the **Lock** column if you would like to view the lock icon. Otherwise, the lock is not visible to you, but other users trying to access the Requirement will receive a message stating the Requirement is locked. Hover the mouse over the 🔓 or 🔒 (lock) to see the lock status. The Requirement(s) are unlocked when you save your changes.

1. Click **DEFINE**.
2. Click the ☰ **Grid View** .
3. Use the check box (or `CTRL+Click`) to select all the requirements to edit.
4. Click the column in any of the selected requirements to activate editing.
5. Make your change. All the selected requirements reflect the change.
6. Click **Save**.

Creating a Requirement Type Diagram

In order to create a Requirement type diagram, the Requirement Type *Diagram* must be in the **Associated Requirement Types** for your project. See the **Project Req Types** tab in the **Administrator Tools**.

The Diagram Requirement Type appears with ⛭ next to the name in the Requirements Tree.

Tip: You can also create a diagram in a Concept. See *Creating a Concept Type Diagram*.

To create a Requirement type diagram:

1. Click **DEFINE**.

2. Click [icon] (**Create new Requirement**).

   To create a child Requirement, select the Requirement in the list, and click **Create new Requirement** > **Create Above...** or **Create new Requirement** > **Create Below...**.

   The **Create Requirement** dialog box appears.

3. Select `Diagram` from the **Requirement Type** list.

4. Type a title for the Requirement in the **Title** field.

5. Click **Save and Close** and then select the Requirement.

6. Double click in the **Description** to begin editing.

7. See *Using Diagrams* and *Using the Diagram Editor* for more information.

Working with User Defined Attributes

Your administrator may have created User Defined Attributes (UDAs). UDAs are custom fields designed for each specific Requirement Type.

To access the UDAs while creating a Requirement, click the **Attributes** tab. If you are in the **Grid View**, UDAs have their own columns.

The possible field types are `Text`, `Number`, `List`, `Multi-select List`, and `Date`.

Note: To add or remove data from a multiple selection list, click [icon]. The list of available options appears. Select or deselect the items to add or remove them.

Copying and Pasting Requirements across Projects

You may have requirements in one project that you'd like to reuse in another. However, you don't want to reuse all requirement so an import and export would require too much pruning work to be efficient. Atlas allows you to copy your selected requirements across projects with a simple copy and paste.

1. Click **DEFINE**.

2. Choose a Requirement from the **Requirements** list.

3. Click [icon] **Copy** or choose **Copy** from the [icon] **Action** menu. The Requirement(s) copied (including list of Requirement IDs and Project ID) are stored in the clipboard. The information remains in the clipboard until another copy is performed. You can change perspectives, perform other actions, etc. and still come back and paste Requirements.

4. Click **HOME**.

5. Open the Project where you want to paste the Requirements.

6. Click **DEFINE**.

7. Place your cursor where you'd like to paste the requirements within the tree.

8. Click [icon], or choose **Paste** > **Paste as Child**, **Paste Above**, or **Paste Below** from the [icon] **Action** menu. The basic copy of the requirements are placed into the tree, including any attached files. Relationships and child Requirements do not copy and paste with the selected Requirements.

Pasting Special

After you have cut or copied your requirement, you can paste special as child, paste special below, or paste special above. Paste Special allows you to paste with customized options, such as creating relationships, copying relationships, and keeping hierarchical structure.

1. Click **DEFINE**.

2. Choose a Requirement from the **Requirements** list.

3. Click ▤ **Copy** or choose **Copy** from the ⚙ **Actions** menu. The Requirement(s) copied (including list of Requirement IDs and Project ID) are stored in the clipboard. The information remains in the clipboard until another copy is performed. You can change perspectives, perform other actions, etc. and still come back and paste Requirements.

4. Click **HOME**.

5. Open the Project where you want to paste the Requirements.

6. Click **DEFINE**.

7. Navigate to where you'd like to paste the requirements within the tree.

8. Click the ⚙ **Actions** menu and choose **Paste Special**.

9. Choose **Paste as Child**, **Paste Above**, or **Paste Below** from the submenu. The **Paste Special Options** dialog appears.
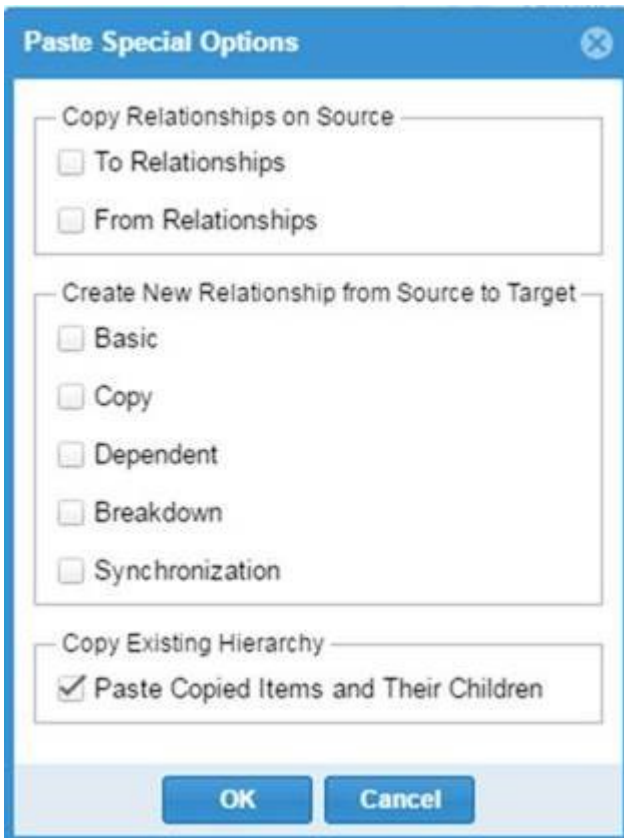
10. Choose the options you want to paste.

   • Create a "to" or "from" relationship with the copied source.
   • Choose a Relationship type to create:

   Basic   Creates an association between two items, without status.

Copy	Creates a copy relationship.
Dependent	Creates a relationship of dependent items that need to be considered together.
Breakdown	Creates a breakdown relationship where items represent the same thing as the *From* item(s) but on lower, more detailed level.
Synchronization	Creates a connection between requirements across projects.

- Select to keep the existing hierarchy.

Breaking Down a Requirement

Atlas supports hierarchies for organizing Requirements. After you have created parent Requirements, you can add child Requirements to refine and organize.

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click ⚙ **Actions**.
4. Select **Breakdown**. The **New Requirement** dialog appears.
5. Choose a Requirement Type from the list.
6. Type a title for the Requirement in the **Title** field.
7. To continue adding Requirements, press `Enter`. The **New Requirement** dialog remains open and ready for the next Requirement.
8. Click **Save and New** or **Save and Close**.

Prioritizing and Sizing a Requirement

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click one of the fields to active it.
4. Edit the appropriate fields.
5. Click **Save**.

Viewing and Accessing Plans from the Requirements Tree

1. Click **DEFINE**.
2. Click the ⊟ **Tree View**.
3. Locate the Requirement.
4. Click the plan link by the **Tracking** chart.

   - If the Requirement is not associated with a Plan, the link states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
   - If the Requirement is associated with one Plan, the Plan name is a link. Click the link to open the Plan in View mode.
   - If the Requirement is associated with more than one plan, click the name to show a list. Click a name in the list to open the plan to open in View mode.

Viewing and Accessing Plans from the Requirements Grid

1. Click **DEFINE**.
2. Click the ≣ **Grid View** .
3. Locate the Requirement and navigate to the **Plan** column.

   - If the Requirement is not associated with a Plan, the column states **none**. Click the link to open the **Add a Plan** dialog box. Within this dialog box, you can select a Plan to which to add the requirement.
   - If the Requirement is associated with one Plan, the column contains the Plan name as a link. Click the link to open the Plan in View mode.
   - If the Requirement is associated with more than one plan, the column displays the Plan names in a comma-separated list. Click the list to open the **Plans for Requirement** dialog box. From this dialog, you can select the plan to open in View mode.

Creating Tags

Use Tags to associate Requirement Types and Concepts with each other. Additionally, Tags make Requirement Types easy to filter and search.

- They can be Project-specific or Server-specific:

  - A **Server Tag** is available to all Projects on the server.
  - A **Project Tag** is only available for the current Project.
- They can be nested up to one level deep.
- They can contain spaces, numbers, and special characters.
- They can be applied in grids by double clicking the cell in the **Tag** column to display the Tag list.
- Watch how to use them: *Tagging Stories*.

1. Navigate to either Concepts or Requirements and select the item you want to tag.
2. Click the **Tags** tab. The Tags panel appears.
3. To create a root level Tag: In the **Available Tags** panel, Click **New Tag** to create a root level Tag. The **Create Tag** dialog box opens.
4. To create a nested Tag: select an existing Tag, click the Gear menu ⚙ on the right and select **Add Child Tag...** The **Create a child tag** dialog box opens.
5. Type a name for the Tag. The new Tag appears in the **Tag** list.
6. If you want to make the Tag available to all Projects on the server, click **Server Tag**.
7. Click **Save**.

Using Attachments with Requirements

You can add attachments to your Requirement to include as related content. Users can upload, download, and replace attachments as needed. As long as users have rights, they can also delete an attachment. There is no limit as to the size of the attachment, however, the larger the attachment, the longer the upload/download time. There is a limit of 1024 attachments per Story.

1. Click ≣**Define**.
2. Choose a Requirement from the Requirement list.
3. Click the **Attachments** tab.

   To Add an Attachment:

1. Click 📎 Attach File. The **Attach Files** dialog box opens.
2. Select one or more files to attach.
3. Click **Add**.

To Open an Attachment:

1. Hover over the row of the attachment.
2. Click **Download File** 📂 to the far right.

To Replace an Attachment:

1. Hover over the row of the attachment.
2. Click **Replace with new file** 🗐. The **Select File** window opens.
3. Click **Select** to browse and select a file.
4. Click **Update**.

To Delete an Attachment:

1. Hover over the row of the attachment.
2. Click **Delete** 🗑.

To Sort Files:

1. Click **Sort** 🔤.
2. Select how you want the attachments sorted: `Time Added`, `Filename`, or `User`.

Attaching a File to a Requirement

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click the **Attachments** tab. The **Attachments** panel appears.
4. Click **Attach File**. The **Attach File** dialog appears.
5. Click **Select**.
6. Browse to the file you want to attach.
7. Click **Add**. The file is added to the requirement and appears in the **Attachments** panel.

If there are several files attached to the Requirement, you can sort by time added or alphabetically. Click the relevant sort icon.

Click ⬇ **Download File** next to the file name to download the file and open it in the appropriate application.

Retrieving a Deleted Requirement

The **Recycle Bin** retains all the deleted requirements from a Project. It displays the last 50 deleted Requirements. To aid in finding requirements, you can use `Find` or search within a month and year.

1. Click **DEFINE**.
2. Click ♻ (Recycle Bin).
3. Type the name of the Requirement in the **Find** field or click 📅 **Calendar** and select month and year. The Requirements meeting your criteria are listed.
4. Select your Requirement.

5. Click ![Restore icon] **Restore**. The Requirement is restored to the Project, including any attachments.

Saving a Requirement as a Story

The best option to save a Requirement as a Story is to send Requirements into plans using the **Plan** perspective. This allows you to estimate the size of your Project, Plans, and iterations. However, you can also send your Requirement to backlogs.

1. Click **DEFINE**.
2. Choose a Requirement from the **Requirements** list.
3. Click ⚙ **Actions**.
4. Select **Send to delivery Backlog...**. This action is only available if there is an estimated size value greater than zero. The **Create Story** dialog appears.
5. Type a name for the Story.
6. Type a description.
7. Click **Create**.
   A relationship is created between the Story and the Requirement.
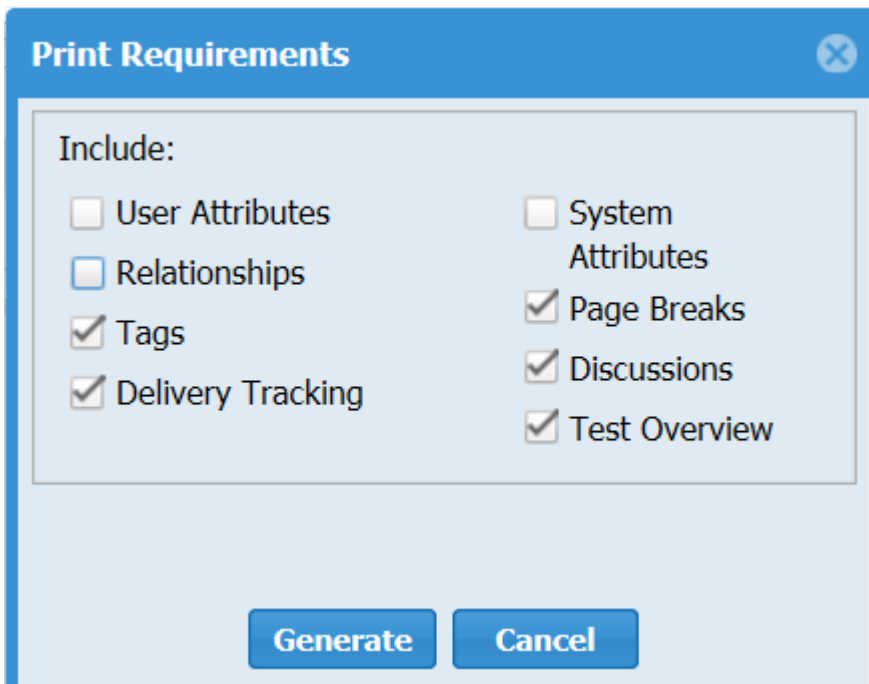
Finding a Requirement

1. Click **DEFINE**.
2. Click **Search**.
3. Type the name of the Requirement or the creator of the Requirement in the **Search** field. The Requirements matching the search criteria appear in the **Requirement** list.

Printing Selected Requirements

`Print Selected Requirements` generates a Microsoft Word document of the requirements that you select from the **Requirements** tree. It is a quick way to generate a filtered Requirements report from the Define perspective.

1. Click **DEFINE**.
2. Select Requirements from the **Requirements** tree.
3. Click 🖨. The **Print Requirements** dialog appears.

4. Select the attributes to include in the report.
5. Click **Generate**. Atlas generates a Microsoft Word document.

Plan Your Requirements

Business stakeholders capture and refine Requirements until they reach a point where they believe they have enough information to fulfill their product vision.

No matter how good the vision for a product is, business stakeholders have to clearly understand their delivery capacity so they can perform high level estimates and prioritize what is the minimal feature set that is required in order to get their product delivered within a given time frame

Currently, when it comes to software development, Agile is the approach of choice for development teams around the world. Agile is based on fairly simple planning concepts that allow development teams to:

- Clearly understand the priority of features that are developed and delivered.
- Keep a consistent way of estimating effort to get features delivered.
- Easily understand how much the team is able to deliver (velocity) within a given time frame (iteration).

The Atlas **Plan Perspective** gives project stakeholders the ability to quickly:

- Prioritize and estimate their Requirements.
- Automatically gather Agile planning information (velocity and iteration duration).
- Send Requirements as Stories into their Agile Teams Backlog regardless of the Agile tool they are using.

Use the following sections to learn more about Plans.

Watch the tour: *Plan Tour*.

Creating a Plan

Follow the steps below to create a Plan.

Watch how to do it: *Create a Plan*.

1. Click **PLAN**.
2. Click **New Plan**. The **Editing Plan** dialog box appears.
3. Type a **Name** for the Plan, **Start Date**, **Target Date** for delivery, and **Weekly Capacity** in the appropriate fields.
4. Select Requirements from the **Available Requirements** column and drag them to the **Planned Requirements** column.

   As you add Requirements to the **Planned Requirements** column, Atlas tracks the size versus available capacity in the **Currently in this plan** field to help your planning capacity.

   You can also order the requirements. The order is retained for the specific Plan and doesn't affect other Plans in or across Projects.
5. Click **Save** to save the Plan for later editing or **Send to delivery backlog** to send the Plan to the Backlog.

Editing a Plan

Follow the steps below to edit a Plan.

Watch how to do it: *Edit a Plan*.

1. Click **PLAN**.
2. Choose a Plan from the **Plan** list.
3. Click ✏ **Edit**.
4. Make your updates to the fields.
5. Drag and drop Requirements into the order you want within the **Planned Requirement** column.
6. Click **Save** to save the Plan for later editing or **Send to delivery backlog** to send the Plan to the Backlog.

Opening a Requirement from a Plan

1. Click **PLAN**.
2. Choose a Plan from the **Plan** list.
3. Click ⚙ **Actions**.
4. Choose **Open**.
5. Choose **Quick Look**.

Choosing **Open** opens a new tab in the browser directly to the Requirement. Choosing **Quick Look** opens a dialog box containing the Requirement information.

Creating a Relationship to a Story

You can view Requirement Relationships to a Story or create a Relationship from within the Plan.

1. Click **PLAN**.
2. Choose a Plan from the **Plan** list.
3. Click ⚙ **Actions**.
4. Choose **Relationships**.
5. View the Story attached to the Requirement, or Click **New Story**.
6. Accept the information provided or type new information in the appropriate fields.
7. Click **Create**. The Story is added to your Agile tool and a Relationship is created with the Requirement.

Using Discussions with Plans

1. Click **PLAN**.
2. Double click a Plan to open it.
3. Click **Open Review**. The **Review Test** window appears containing the **Discussions** pane.
4. You can select the top level node in the tree to discuss the entire Plan, or you can select an individual item from the tree.
5. In the **Discussions** pane, click **New Topic** or reply to an existing one.
6. Click **OK**.

Sending Requirements to Delivery Backlogs

After you have refined your iteration plans to fit within the release time frame, you can send the Requirement to the delivery Backlog.

1. Click **PLAN**.
2. Double-click the Plan to send to the Backlog. The Plan appears.
3. Click **Send to delivery Backlog** to send to Backlog. If the Plan is new, Atlas publishes Requirements as Stories in the Backlog and changes the status of the Plan to `committed`. Additionally, a link back to Atlas is generated and added to each Story created from a Requirement Type.

   If editing the Plan, a confirmation dialog appears. Select **Create new Stories for each Requirement in the Plan** or **Only creat Storeis for new Requirements**, and click **Ok**.

Deleting a Plan

1. Click **PLAN**.
2. Choose a Plan from the **Plan** list.
3. Click 🗑 **Delete**.

Track Progress

After a Plan is set, the development team plans Sprints through their Backlog and builds and delivers your product in iterations. This approach allows the business stakeholder to review and refine your priorities as they progress.

The business stakeholder can review and refine Requirement priorities. Afterward, the agile team breaks down Requirement into multiple small sets of Stories. Priorities can be shuffled and re-shuffled within the Backlog and allocated and delivered within Sprints every 2 to 3 weeks.

Business stakeholders can track the delivery progress of their Requirements no matter how scattered and broken-down the Stories become.

The **TRACK** perspective in Atlas enables project stakeholders to quickly:

- Understand the total payload of a Requirement based on the actual estimates from their Agile teams.
- Check the delivery progress of a Requirement based on the progress of the Stories being delivered by Agile teams.
- View the delivery progress of a Requirement across several Projects with the Projects column and view of associated stories in each project.
- View the total Plan delivery status.

▶ Watch the tour: *Track Tour* or *Track Plan Details* or *Track Requirement Info*.

Understanding Agile Delivery At-A-Glance

1. Click **TRACK**.
2. Locate the Plan you would like to review in the **Plan** list. The status bar appears along the right of the Plan. The chart is colored using the green, yellow, red status indicators. Data from any child Requirement Types or Stories are included in the status.
3. Double-click a Plan from the **Plan** list.
4. Optional: Click 𝒊 (**Info**) next to the **Filter** to view the **Legend**. The **Legend** appears below the **Plan** list. Click the **x** above the **Legend** to close it.

Tracking Requirement Type Progress

Follow the steps below to track Requirement Type progress.

Watch how to do it: *Track Requirement Info*.

1. Click **TRACK**.

2. Double-click a Plan from the **Plan** list.

3. On the **Tracking** dialog box, click +/– next to the Requirement Type to view the breakdown. Click (**Info**) next to the **Filter** to view the chart legend. The legend describes the icon status meaning. The Gantt chart displays the status as related to the delivery date. Click the **Legend** button to open or close the legend.

   You can use your **Quick Filters** to quickly find the requirement you would like to view. Click the **Quick Filters** list and select the filter.

4. Click (**Quick Look**) to view individual Requirement details. The **Requirement Details** dialog box appears with tabs to view **Discussions**, **Relationships**, **InfoVersions**, and **User Defined Attributes**.

Viewing Requirement Definition Status within Plan

To view status of Requirements within the Plan:

1. Click **TRACK**.

2. Choose a Plan from the **Plan** list.

3. Find Requirement and view Flag state in Gantt chart.

   See the *Requirement Date Planning Flag States* for descriptions of each flag.

4. Hover over the Flag to view details.

Opening Requirements and Stories from Tracking Chart

You may want to view the details of a requirement or a story while viewing the Tracking chart.

1. Click **TRACK**.

2. Double-click a Plan from the **Plan** list.

3. Navigate to the item you want to open.

4. Click **Go To**.

> The item opens in a new browser tab.

Viewing Test Results

When you synchronize Requirements or Stories between the Atlas Hub and a testing tool, Atlas can display the test results returned by your testing tool. In order to do this, your system administrator needs to use Micro Focus Connect to connect the two systems.

See *Enabling Testing Tool Integration*. After the systems are connected, you can use the following features to view test execution status:

Requirement Tracking Tab In the **Define** perspective, open a Requirement and click the **Tracking** tab. You will see the **Tests** section.

There are two graphs:

Latest Test Results	This graph provides an aggregation of the statuses of all the Tests assigned to a Requirement (and its children, if any), as they appear the last time they were executed. **N/A** indicates Tests that are assigned but they have **never** been executed (for example, a brand new test).
Test Results Per Day	Contains the following: • The **Duration** on the X-axis of the graph correlates to the duration supplied in the **Admin Tools**. The number of tests in the Y-axis is that of the selected item, `plus it's children`. • Click the legend (`Passed`/`Failed`/`Not Run`) at the top of the graph to turn each one on/off. • The **Goto** button takes you to the equivalent artifact in the integrated test tool. • Hovering over an item gives you a tool tip with details.
Test Integration in Tracking Dialog (Gantt)	In the **Tracking** perspective, open a plan in the Gantt. • There is a **Tests** column on the grid. Hover over the bars to view the details. • In the **Change Overview** section when in **Time Machine** mode, there is a **Tests Count** section in the overview. This displays the test count change over time

Using the Time Machine

While viewing a current version of a Whiteboard, Plan, tracking report, or Requirements, you might want to look at the past status to understand changes and progress. Use the Time Machine to view a Plan's status or Requirements from a past date.

1. Click **Time Machine**.
2. Chose **Pick Date and Time** to select a date.
3. Select a past date in the calendar from when the Project was created to just before the current date and click **Apply**. The top bar turns grey to indicate that you are viewing content in Time Machine.
4. Click **Time Machine**.
5. Click **Save** to save the point in time without creating a Label.

   Note: This procedure can only be performed by Server administrators.

6. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

Creating a Label

As you review a past status and compare it to the current status, you may find you want to save it to view at a later time.

1. View a past view using the **Time Machine**.
2. Click **Time Machine**.
3. Click **Save**.
4. Type a name for the saved Label.
5. Type a description for the saved Label.
6. Click **Save**.

Editing Labels

1. Click **Time Machine**.
2. Choose **Manage Labels**. The **Manage Labels** dialog appears.
3. Type a new name for the saved view.
4. Add more detail or type a new description for the saved view.
5. Click **Save**.

Viewing Past Status Based on a Label

To view a past status based on a Filter created in Atlas Hub:

1. Click **Time Machine**.
2. Chose a Label from the list. The top bar turns grey to indicate that you are viewing content in Time Machine.
3. Click **Return** to return to the current information.

If you click **Search** or **Home**, you will no longer be in Time Machine.

Viewing Past State of Plan in Track Perspective

Within a plan in the **TRACK** perspective, you can view a comparison of the current status with a past status.

1. Click the **Track** perspective. The **Track** page appears.
2. Locate the plan you would like to review in the **Plan** list.
3. Select a label from the **Historic Data** list or click (**Time Machine**) and select a date. The status bars appear for both states, offering an at a glance comparison between the current and past date.

Viewing Details of Differences

After selecting a past date or a Label from the Time Machine, click the **Details** tab to view details of the differences between the two states.

The **Details** tab contains three panes:

Overview	Contains a summary of changes to delivery dates, estimates, number of Requirements, and number of Stories.
Requirements	Lists added, removed, and updated Requirements. Click a Requirement to go directly to the Requirement within the **Requirements** Tree.
Stories	Lists the added, removed, and updated Stories. Click a Story to open it in your Agile tool.

Creating Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

To create a Filter:

1. Click (**Filter**). The **Filter** dialog box appears.
2. Click (**New Filter**). The editable filter field appears in the right panel.

3. Type a name for the filter.

4. Select **Project** if the filter is for the project only or select **Shared** if the filter is for all projects.

5. In the initial **Where** clause group, select criteria from the **Criteria** list. The appropriate field for the specified criteria appears.

6. Select an operator from the **Conditions** list (for example., `begins with, >=, >,` etc.).

7. Select or type the criteria for the operator in the last field. This field changes based on the criteria selected from the **Criteria** list.

8. Optional: Click **Add Query Rule** ⊕ to add a new row to the current **Where** clause group.

9. Optional: Click **[Add Group]** to add another level to the filter. **And/Or** options appear.

   You can add additional groups by repeating these steps.

10. Optional: Click **And** to change it to **Or**.

11. Click **Save**. The filter appears in the filter list.

Using Saved Filters

Filters can be created and saved for reuse across a Project across all perspectives that would benefit from the capability.

1. Click ▼ (**Filter**). The **Filter** dialog box appears.

2. If you have saved a Filter, click the Filter in **Saved Filters** list and click ▶**Apply**. All results matching the filter criteria appear in the results.

3. To stop the applied filter, open the **Filter** dialog box and click **Clear Applied Filter**.

Duplicating Filters

You can duplicate an existing filter and use to use it to create another filter.

1. Click ▼ (**Filter**). The **Filter** dialog box appears.

2. Select a filter from the **Filter** list.

3. Click **Duplicate Filter**. A new filter appears in the **Filter** list, named the same as the originating filter with **-copy** amended to it and the filter information appears in the right pane.

4. Rename the filter.

5. Amend filter criteria.

6. Click **Save**.

Deleting Filters

You must be a server administrator or the filter creator.

If you no longer need a filter, you can delete them in order to keep an uncluttered filter list.

1. Click ▼ (**Filter**). The **Filter** dialog box appears.

2. Select a filter from the **Filter** list.

3. Click 🗑 **Delete**.

Quick Filters

Use a *Quick Filter* to quickly find a Requirement in the Define perspective.

Click the **Quick Filters** list and select the filter.

Click **Clear Filter** to remove the filter.

Creating Reports

You can create **Requirement** Reports, **Plan Review** Reports, and **Plan Tracking** reports from the current view or the Time Machine view. The reports are output as Microsoft Office Word Document (DOCX) files.

Requirement	Includes all Project Requirements, unless a Filter is set.
Plan Review	Includes selected Plan and its associated Requirements for the Project. Also, provides option to compare current state to a time label or compare two older time labels to each other.
Plan Tracking	Includes selected Plan that is in production and the Requirements, Stories, and status within it.

Watch how to do it: *Generating Report*.

Generating Requirements Reports

1. Choose a Project from the **Projects** list.
2. Click **Report**.
3. Select **Requirements**.
4. Optional: Select a quick Filter to include only items for a specific set.

   The report with applied filter includes the name of the parent, but does not include details if the parent does not meet filter specifications. This gives context to requirement locations within the hierarchy.

   Sibling requirements that do not meet the filter specifications do not appear in the report.
5. Check or un-check the information to include in the Report:

Attribute	Includes the User Defined Attributes for the Requirement.
Relationships	Includes a list of the items related to each Requirement.
Tags	Includes the Tags associated with the Requirements.
Discussions	Includes the Discussion threads associated with each Requirement.
Delivery Tracking	Includes the tracking status.
System Attributes	Includes system attributes.
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.
Test Overview	Includes a test results overview table if test integration is enabled by the system administrator or project administrator.

6. Click **Generate**. The Report is generated as a DOCX file and your browser provides the option to open or save the file.
7. Optional: Click **Yes** when opening the file and receiving the following message:

Microsoft Word

This document contains fields that may refer to other files. Do you want to update the fields in this document?

[Yes]   [No]
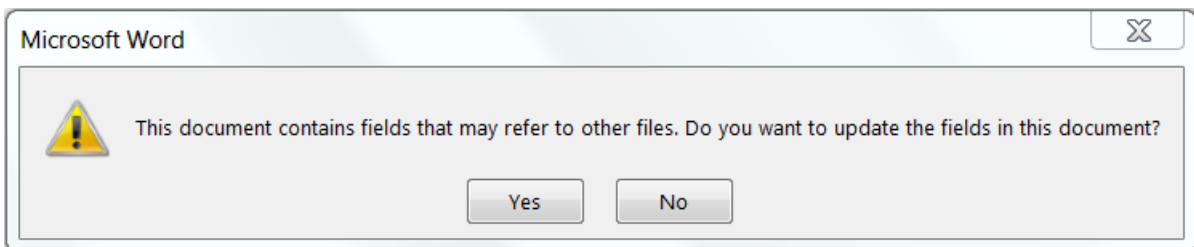
The hierarchical table of contents is created.

Table of Contents

The generated table of contents only shows five levels deep. If the requirements go deeper than five levels, all levels below five appear on the lowest level.

If you select **No**, the table of contents area contains a message prompting you to generate the table of contents.

> **Example Requirements Report**
>
> The Requirements Report contains a cover page and a table of contents. The cover page contains the Project name, the type of Report, who generated the report, and the date the Report was generated.
>
> The body of the Report appears as:

Use Cases

Owner: Administrator	ID: 2507
Type: Business Requirement	Revision: 1.3
Priority: Could Have	Modified: May 01, 2015, 02:05 PM BST

Status: Deliverable

Rank: 0	Estimate: 0

Hierarchy:
Use Cases is a top level requirement.

This item is used as a high level folder for all Atlas use cases.

Review the children of this item for details...

Attributes

Contractor	
Contractor Names:	asdf

Example UDA Group	
Reward:	1
Team:	asdf
AtlasWorkflowStatus:	Deliverable

Relationships

No relationships assigned.

Tags

- Server

Discussions

Administrator on June 11, 2015 at 12:3
@markho - lets talk over some of these

Delivery Tracking Information

Delivery Status:	Not S
Plans:	Non

This Requirement is not yet shared on

The example image is displayed as a two page spread to showcase all the selected options within the Report.

Generating Plan Review Reports

The **Plan Review** Report focuses on showing items and related discussions. It optionally shows basic delivery data.

To compare two labels to each other, open a label view from the Time Machine, then follow the same steps as you would for comparison report to current view to a label. The report always compares the most recent label to the older label, regardless of the label you are viewing in Atlas.

1. Choose a Project from the **Projects** list ▤.
2. Click ▣ **Report**.
3. Select **Plan Review**.
4. Choose the Plan from the **Plan** list.
5. Check or un-check the information to include in the Report:

Attribute	Includes the User Defined Attributes for the Requirement.
Relationships	Includes a list of the items related to each Requirement.

Tags	Includes the Tags associated with the Requirements.
Discussions	Includes the Discussion threads associated with each Requirement.
Delivery Tracking	Includes the tracking status.
System Attributes	Includes system attributes.
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.
Test Overview	Includes a test results overview table if test integration is enabled by the system administrator or project administrator.

6. Optional: Choose a Time Label from the list to run a comparison of the current state to the Time Label state.

   Labels created after the plan was created display in the list.

7. Click **Generate**. The Report is generated as a `DOCX` file and your browser provides the option to open or save the file.

Plan Review Report Example

The **Plan Review** Report contains a cover page and a table of contents. The cover page contains the Plan name, Project name, the type of Report, who generated the Report, and the date the Report was generated.

The body of the Report appears as:

Plan Overview

Start Date: May 27, 2015 BST   Estimated Effort: 0
End Date: June 23, 2015 BST   Estimated Capacity: 20.0
Estimated Delivery Date: May 27, 2015 BST   Requirements: 0

Discussions

There are no discussions.

The remainder of the Report lists the associated Requirements, displayed the same as in the **Requirement Report**.

Plan Review Comparison Report

The Plan Review Comparison report shows changes in Test Overview, User Attributes, Relationships, Tags, and Delivery Status.

The cover page displays the label name and the date and time of the label, indicating that the report is a comparison.

Author: Administrator

Date: January 19, 2017, 01:43 PM GMT

Showing differences since: Postplan Changes (January 19, 2017, 01:43 PM GMT)

The table of contents contain indicators for how sections have changed:

CHG	Changed

UNC	Unchanged
DEL	Deleted
ADD	Added

> **Note:** The report does not show Project Name changes or Project Description changes.

UDAs, Tags, and Requirements display changes with strikethrough text.

Descriptions show changes with comparisons and highlighted text.

Relationships display in a comparison table as follows:

Relationships

	Direction	Relationship Type	Status	Item Type	Name
	From		Up To Date	Test	Test for Payment flow 1
ADD	From		Up To Date	Test	Test for Payment flow 0
ADD	From		Up To Date	Test	Test for Payment flow 1
ADD	From		Up To Date	Test	Test for Payment flow 0
	From		Up To Date	Test	Test for Payment flow 0
DEL	~~From~~		~~Up To Date~~	~~Concept~~	~~Payment Flow Outline~~
CHG	From	Basic Relationship	Up To Date	Plan	TPS Report Automation ~~test~~
DEL	~~From~~	~~Basic Relationship~~	~~Up To Date~~	~~Requirement~~	~~Workflow Management for Cross Platform Clients and Devices~~
CHG	From	Dependent	Deferred ~~Up To Date~~	Requirement	Idea Sharing ~~Uniquely customize timely collaboration and idea sharing through high quality opportunities. Enthusiastically synthesize state.~~
	From	Dependent	Up To Date	Requirement	Competently transform fully tested convergence via high standards in e-business. Objectively empower.

Delivery Tracking displays all deleted items at the end of the report.

Test Overview displays changes in test results and dates with strikethrough text as follows:

Test Overview

Assigned Tests:	6	
	~~1~~	
Current Test Results:		
Passed:	4	
	~~1~~	
Failed:	2	
	~~0~~	
Not Run:	0	
N/A:	0	
Last Execution Results:	February 23, 2017 GMT	
	~~January 27, 2016 GMT~~	
Passed:	15	
	~~2~~	
Failed:	5	
	~~1~~	
Not Run:	1	
	~~0~~	

Generating Plan Tracking Reports

Plan Tracking Reports focus on showing items and related delivery status. These Reports include Story data from the Agile tool as well as the Requirements information and Plan information from within Micro Focus Atlas.

1. Choose a Project from the **Projects** list ☰.
2. Click 📄 **Report**.
3. Select **Plan Tracking**.
4. Choose the Plan from the **Plan** list.
5. Check or un-check the information to include in the Report:

Attribute	Includes the User Defined Attributes for the Requirement.
Relationships	Includes a list of the items related to each Requirement.
Tags	Includes the Tags associated with the Requirements.
Discussions	Includes the Discussion threads associated with each Requirement.
Delivery Tracking	Includes the tracking status.
System Attributes	Includes system attributes.
Page Breaks	Creates page breaks between Micro Focus Atlas artifacts, such as Requirements and Stories.
Test Overview	Includes a test results overview table if test integration is enabled by the system administrator or project administrator.

6. Click **Generate**. The Report is generated as a `DOCX` file and your browser provides the option to open or save the file.

Plan Report Example

The **Plan Tracking** Report contains a cover page and a table of contents. The cover page contains the Plan name, Project name, the type of Report, who generated the Report, and the date the Report was generated.

The body of the Report contains Plan details, Plan status, Requirements, and Story data. The body of the Report appears as:

Plan Overview

Start Date: April 30, 2015 BST   **Completed:** 0% (None)
End Date: June 01, 2015 BST   **Started:** 0% (None)
Items: 2   **Not Started:** 100% (2 items)
                                              Blocked: 0% (None)

Discussions

There are no discussions.

The Requirements for the Plan appear as follows depending on the options selected:

Add multi-selection list type UDA

Owner: **ID:** 2658
Type: Business Requirement   **Revision:** 1.0
Priority: Must Have   **Modified:** May 01, 2015, 10:24 AM BST

Status: Draft test
Rank: 10   **Estimate:** 8

Hierarchy:
- 2550: System and User Administration
- 2649: Flexible type creation
- 2656: UDA types

NOTES: two parts:
1. Admin to create attribute and define values
2. Editing control (custom check / selection)

Support multi-selection list as an attribute type. Ideally this will contian checkboxes, and a list. We to beware of losing selected values.

http://dev.sencha.com/extjs/5.0.0/examples/multiselect/multiselect-demo.html

Options ▾

Multiselect:
One Hundred Twenty Three
One
Two
Three
Four
Five
Six
Seven
Eight
Nine

Attributes

Contractor	
Contractor Names:	

Example UDA Group	
Reward:	1
Team:	
AtlasWorkflowStatus:	Draft test

Relationships

No relationships assigned.

Tags

No tags assigned.

Discussions

There are no discussions.

Delivery Tracking Summary

Start Date:	June 22, 2015, 04:51 PM BST
End Date:	June 24, 2015, 09:34 PM BST
Duration:	2 days
Points Completed:	0% (0/8)
Stories Completed:	0% (0/0)
Issues:	Not In Backlog

Search

Click 🔍 (**Search**) to open the search page.

Select the button for the types that you want to search.

Select current project, all projects, or a specific project from the **Only show results from** list.

Type the string you want to search, and click **Search**.

Atlas does not search common words, such as "and", "if", "else", "then", etc. These common words are referred to as *stop* words because they are used so often that the search would return too many non-specific results. To view the full list of stop words or to add your company-specific stop words, open `c:\Program Files\Micro Focus\Hub\Search\config\en_stopwords.txt`.

Atlas gives priority to title, content, description, and snippets when matching the query to items it will display in results. All other field items are lower priority. The Item Type column displays the type of item that matched the search criteria.

To filter the search by specific assets, click a tab next to **View**.

To the right of each search result, there are icons to use:

Quick Look	Opens the item in an editor for you to review.

Go To   Jump to an item in your search results. If an item is in a different project, Atlas switches your context to the other project as long as you have permission to view it. When you go to a Story, Atlas opens a new window for the external URL for the tool that you use for Agile, such as Rhythm, Rally, Jira, etc.

> **Note: Go To** is not available for some search results if Atlas has not been integrated with the tool.

Editing Your Profile

To edit your profile:

1. In the top right corner of the application, click your **<User Name>** and select **Edit Profile**. The **Edit your profile details** dialog appears.
2. Change your **Logon Name**, **Password**, **Name**, **Email Address**, or **Phone Number**.

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