iALM.ai

Getting Started

Revised 11/30/2025

The following sections will help you get started with iALM.ai quickly. For more information, you may want to consult the complete help at https:// https://ialm.ai/support/help.php

Logging in the First Time

If your account was set up as a Site Manager only, when you login, you will be logged into the site management portal where you will be allowed to perform only site management tasks. You will not be allowed to perform any project tasks unless your account is also set up with additional privileges such as Project Manager, Product Owner, Team Member, etc. A site manager can add these privileges to his/her account after logging in.

All purchased licenses are provisioned with one account set up as a Site Manager only.

If your account was set up with additional privileges such as Project Manager, Product Owner, Team Member, etc., when you login, you will have the option to login either as a Site Manager or Project Manager, Product Owner, Team Member, etc.

All free trial sites are provisioned with one account set up with Site Manager, Project Manager, and Product Owner privilege.

Changing Your Password

We strongly recommend that, on your first login, you change your password to something you can remember. Remember, your credentials to log at the IALM.ai site is also the same to log into your iALM.ai Support Portal at https://ialm.ai/Support.php to submit a ticket or a question.

iALM.ai

1. **Adding Users to the Site** (Site Manager)

This step is essential to add users to your IALM.ai site so that they can work on different projects. If you are trying IALM.ai for the first time and just want to explore its features on your own, there is no need to add other users. **You can just login as a site manager as described below and grant yourself all the privilege just to be able to perform different functions within IALM.ai**. Once you do that and save the changes, you can logout from the Site Management session and login again as a product owner/project manager. You can always add more users to the site at a later time.

   a. Login as a Site Manager. If this is your first login, please change your password to something you can remember.
   b. On the left menu click "Manage Users Pool", then click "New" button to add new user.
   c. Fill in all required fields and click "Save".
   d. Repeat step 2 and 3 to add more users. The number of users you can add depends on how many users your site was authorized to have.
   e. You can logout after you add users and login as a Product Owner and Project Manager to create your first project, assign team members to that project, and perform other project management tasks below. Only project manager user types can create projects.

User Types

- **Site Manager**: May have more than one per site. May perform any of the tasks on the Site Manager interface.
- **Product Owner**: May have only one for each product. May perform any of the tasks listed under the product, including creating projects for the product.
- **Project Manager/Scrum Master**: May have one for each project. Responsible for performing all project management tasks within projects assigned to him/her. Under the current architecture, a project manager cannot create a project. Only product owners can create a project. The site admin wishes to allow project managers to create projects, then he or she must grant them product owner privilege.

- **Team Member**: May have more than one per project. A team member may work on multiple projects assigned by project managers. May perform any task with the project, except project manager's tasks. The privileges of a team member are determined by the project manager.

- **Customer**: May have more than one for any project. Have limited access to certain reports as dictated by the project manager but cannot perform any project tasks.

- **Release Manager**: Able to create releases, add features to a release, and remove features from a release.

2. **Creating a Product or a System** (Product Owner)

   Before you can create a project, a product owner needs to create a product or a system. Projects in IALM.ai are created to implement features for a product or a system. You can have as many projects as you wish for a given product or a system, each project delivering a set of features for the product or the system. Those projects can run sequentially or concurrently. You can also have as many products as you want on an IALM.ai site.

   a. Login as a Product Owner.
   b. The "Portfolio" screen will open with all products or systems that have been created under your IALM.ai site displayed on the left. Projects that have been created under any product or system will be displayed on the right when you select a product. Remember, the screen will display only those products or systems that have any project that you were assigned to you as a project manager or a team member.
   c. If no product has been defined for this site. You will see a message "Define a Product"
   d. Click on "Define Product". Enter product name and description and click "Save".
   e. You may add more products to the site any time

3. **Creating a Project under a Product or a System** (Product Owner)

Under the current architecture, creating projects requires Product owner privilege. If you want a specific project manager to be able to create projects, then the site admin needs to give him or her product owner privilege.

Once you create a product or a system, you can create a project under that product. You can create as many projects as you wish for a given product or a system. A Project delivers features for that product or system.

a. Click on "Create a New Project" under the Product
b. Enter project name, description, start and end dates.
c. You will need to decide whether your project is going to use Agile or non-agile methodology, and your project will be configured accordingly.
d. If you choose Agile methodology, IALM.ai will create your first sprint "TBD". All features/user stories added to the project will be scheduled by default to this TBD sprint. You can later change a feature/user story to be scheduled for any specific sprint within the project.

e. You may add more sprints to your project and their anticipated start and end dates. If you plan to have all features/user stories in the project implemented in one sprint, then you need to add only one sprint.
f. Once you save your project, you will see your project appearing on the right-hand side of the screen when you select the product from the left side of the screen.

4. Adding Features to your Project (project Manager)

This task can be performed any time after you have created a project. A feature in IALM.ai is either a User Story (if your project is set up to use an agile methodology) or a requirement (if your project is set up to use a non-agile methodology). In fact, a project can have a mix of requirements and user stories, and they are treated seamlessly. This seamlessness has been provided by design to give flexibility when a requirement cannot be phrased as a user story. Examples are requirements that do not necessarily involve a user.

You can add features to your project in several ways depending on your project management work style.

4.1 Adding features from the Requirements (User Story) screen

This is the default way to add requirements or User Stories to your project. IALM.ai uses the same screen for requirements (if your project uses a non-agile methodology) and user stories (if your project uses an agile methodology). You get to the Requirement/User Story Screen from the top menu.

Since requirements and user stories are managed and displayed in a tree structure (parent and child), to add a requirement or a user story, you can add it either as a child or as a sibling of the current requirement or a user story.

Requirements and User Stories in IALM.ai are also categorized under "Categories". Two Categories are always present by default, Functional and Quality. You can always add other categories from the "Manage Requirement Categories" task accessible from the Project Activities tab.

To add a requirement or a user story:

1. Select a category from the left and click on Add a Child. This will create a new requirement under that category.
2. You can add a requirement or a user story as a child or as a sibling of another requirement by selecting that requirement and clicking on the appropriate option from the requirement/user screen top menu.

4.2 Adding features from Product Backlog or for a Specific Release

In some cases, you may wish to add features from your product backlog or you may wish to add features that have been scheduled for a specific release. You can do that by following the following steps:

a. Click on "Project" from the top menu

b. Click on the “Project Activities” tab
c. Click on “Edit Project” at the bottom of the screen. You will see the following options:

Include Features

- Include Features from Product Backlog
- Include Features scheduled for a specific Release

d. If you select the first option, you will see a list of all features currently in the Product Backlog that have not yet been included in any project. Select whichever features you wish to include and click on “Include”. Then close the Product Backlog window.
e. If you select the second option, you will see a screen to select a specific release. Once you select a release, you will see all features that the release manager planned for that release and have not yet been included in any project. Select whichever features you wish to include and click “Include”. Then close the release features screen.
f. The third option is the default way to add features to your project.

5. **Assigning Team Members to a Project**:

a. Login as a Project Manager.
b. From the left click on a product that has been created before. Now you will see on the right side all projects associated with that product.
c. To access a project, click on the name of the project.
d. Now you can see three tabs.

e. Select the “Project Activities” tab then go to “Manage Project Team” to assign team members to the project. You can also access the same task from the “Project Workflow” tab.
f. Users who have been created for the IALM.ai site will be displayed on the left-hand side. Simply select users and move them to the right to assign them to the project.

g. You can assign Access Privileges for a team member by clicking on "Expand".
h. You can assign Collaboration Privileges to a team member with respect to different collaboration activities by clicking on Collaboration".

6. Configure Project Dashboard (Optional)

The Project Dashboard will give quick reports and charts about a project. You can perform this task any time during the project, especially after you have created some data in the project.

a. Login as a Project Manager
b. Select any product from the Portfolio screen
c. Open a project from the right by clicking on the project name
d. Select the "Project Dashboard" tab. If you have a project already open, you can access the same tab by clicking "Project" on the top menu
e. Click "Configure Dashboard" to add and remove items to your project dashboard. Notice that charts always added to the center of the dashboard and tables can be added to the right or the left of the dashboard.