iALM.ai

# Getting Started

*Revised January 24, 2026*

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://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.

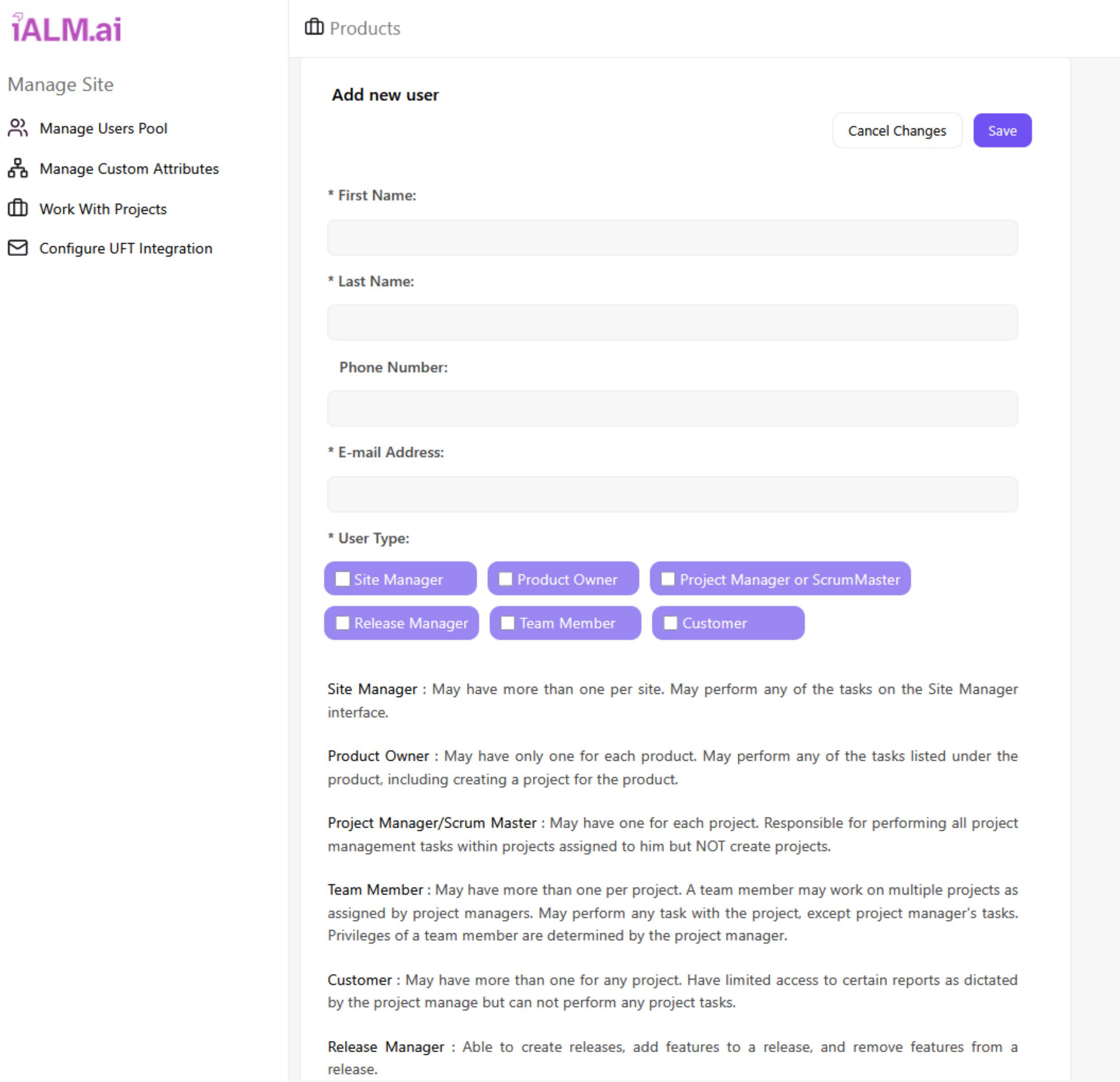
All free trial sites are provisioned with one account set up with Site Manager, Project Manager, and Product Owner privilege.

## Changing Your Password

We strongly recommend that, on your first login, you change your password to something you can remember. 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/ to submit a ticket or a question.

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. We strongly recommend reviewing the recording titled "First Things First: Managing User Pool in iALM.ai"



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.

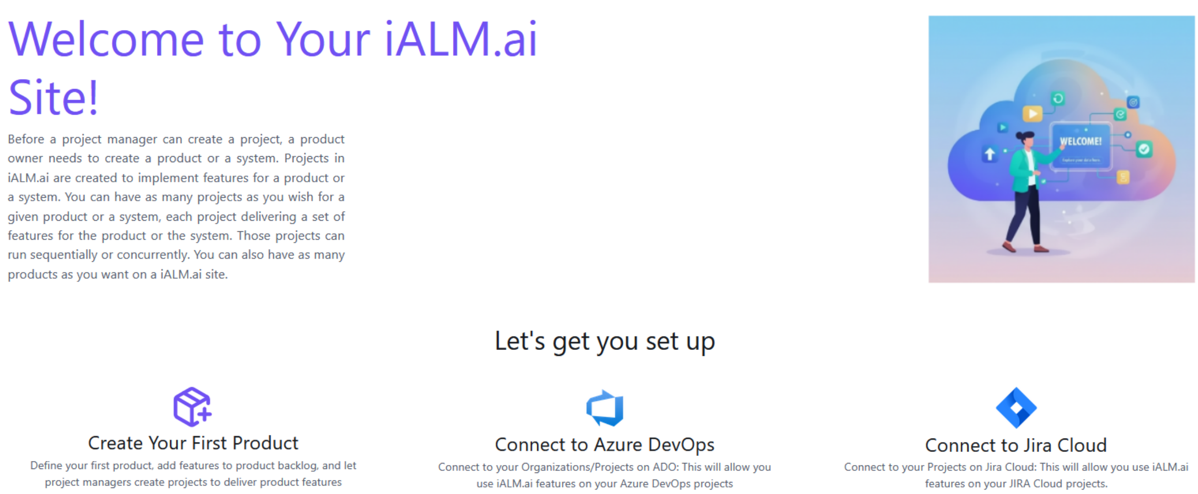
## User Types

- **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.
   We strongly recommend reviewing the recording titled "Creating your First Product in iALM.ai"




   a. Login as a Product Owner.
   b. Since you do not have a product defined yet, you will see the screen above to create your first product. You have three ways by which you create your first product:
      i. You can create your product directly by clicking "Create Your First Product", enter product name and description, and click save.
      ii. Connect your iALM.ai site to your Jira Cloud account. You will need to enter your Jira account credentials. iALM.ai will use the name of your Jira site as your first product name and will

allow you to synchronize your projects under your Jira with your iALM.ai site.

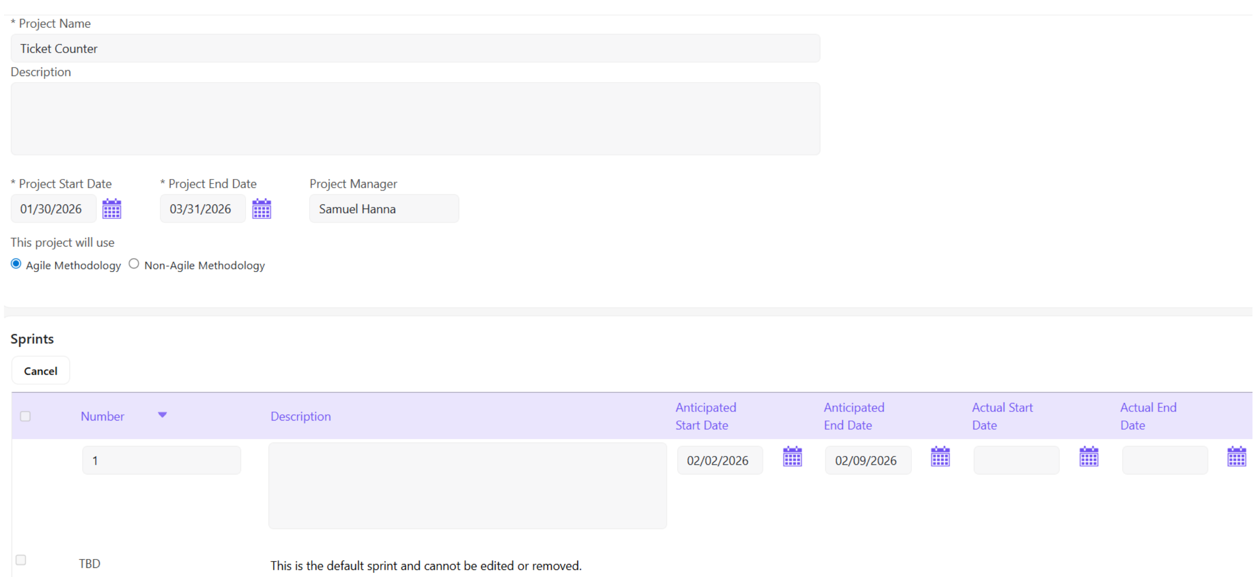
iii. Connect your iALM.ai site to your ADO account. You will need to enter your ADO account credentials. You can then synchronize any of the organizations you have in your ADO account as products in iALM.ai. You will then be able to synchronize any project under the ADO organization with projects under your product in iALM.ai.

## 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 have created a product or a system, you can now 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. From the list of products on the left, select the product for which you want to create a project
b. Click on "Create New Project" under the Product
c. Enter project name, description, start and end dates, and project manager name.



d. You will need to decide whether your project is going to use Agile or non-agile methodology, and your project will be configured accordingly.
e. 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.

f. 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.
g. Click save, wait for the project database to be created. 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 or User Story screen*

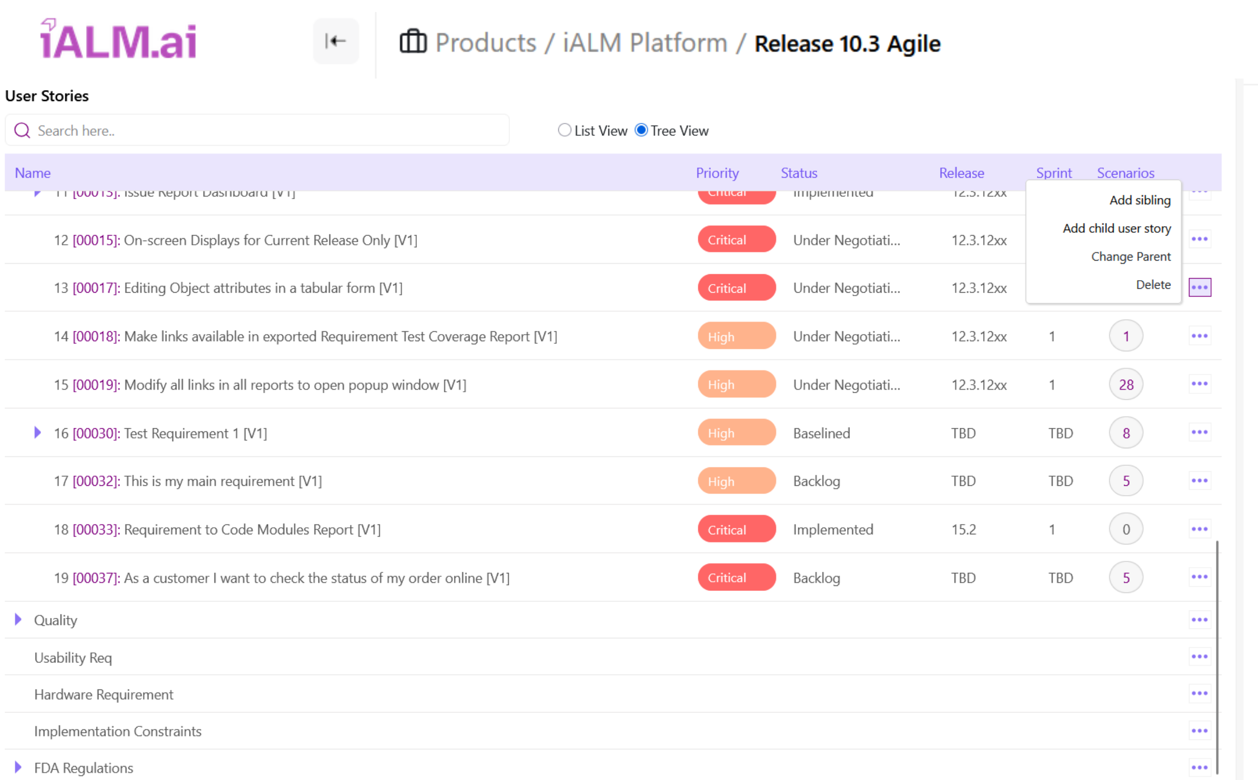
This is the default way to add requirements or User Stories to your project. IALM.ai uses the same screen for requirements (if your project uses a non-agile methodology) and user stories (if your project uses an agile methodology). You get to the Requirement/User Story Screen from the left menu.

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 left menu, Project → Configure Project Entities → Add User Story Category. (See screen below)

To add a requirement or a user story:

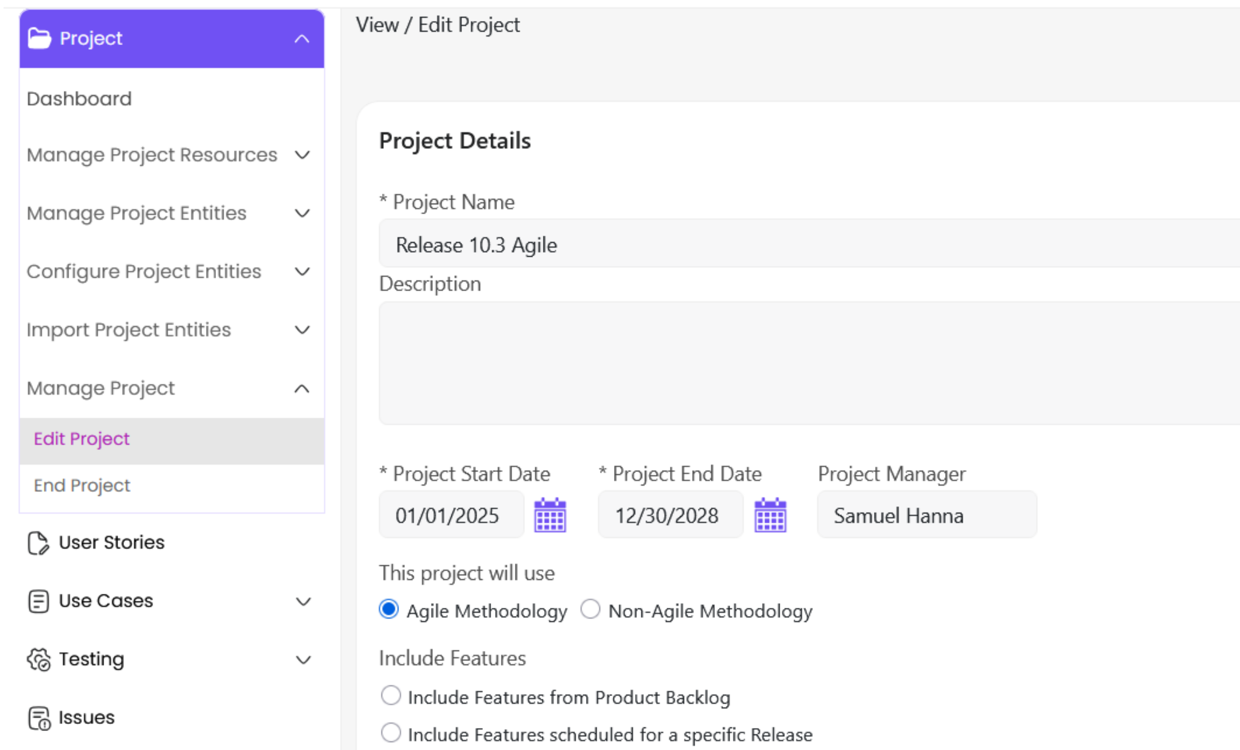
1. Select User Stories or Requirements from the left menu. This will display the user story/requirement tree on the right with user stories/requirements grouped by categories.
2. You can create a new user story or requirement in two ways:
   a. Select the category you want to crate a user story or a requirement for and click on "Add Child". This will create a new user story or a requirement under this category.
   b. You can add a user story or a requirement as a child or as a sibling of an existing requirement by clicking on the 3 dots next to any user story or requirement and clicking on the appropriate option. See screen image below.



### *4.2 Adding features from Product Backlog or for a Specific Release*

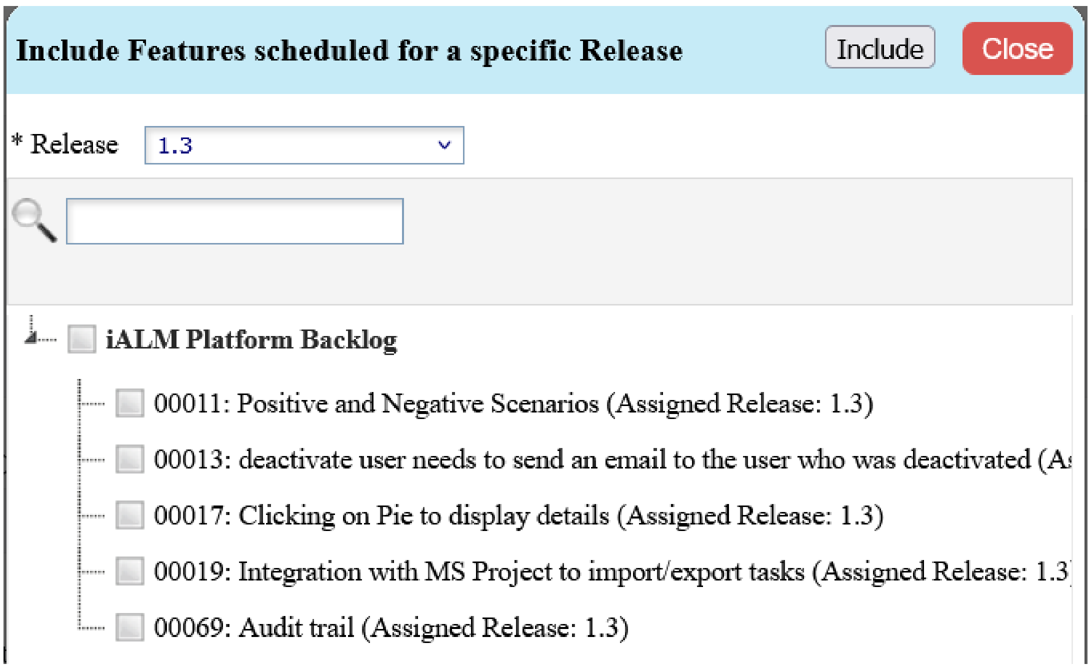
In some cases, you may wish to add features from your product backlog, or you may wish to add features that have been scheduled for a specific release. You can do that by following the following steps:

a. Click on "Project" from the left menu
b. Click on "Manage Project" then "Edit Project" – The project Details screen will be displayed (see below)
c. Select either "Include Features from Product Backlog" or "Include features Scheduled for a Specific Release"



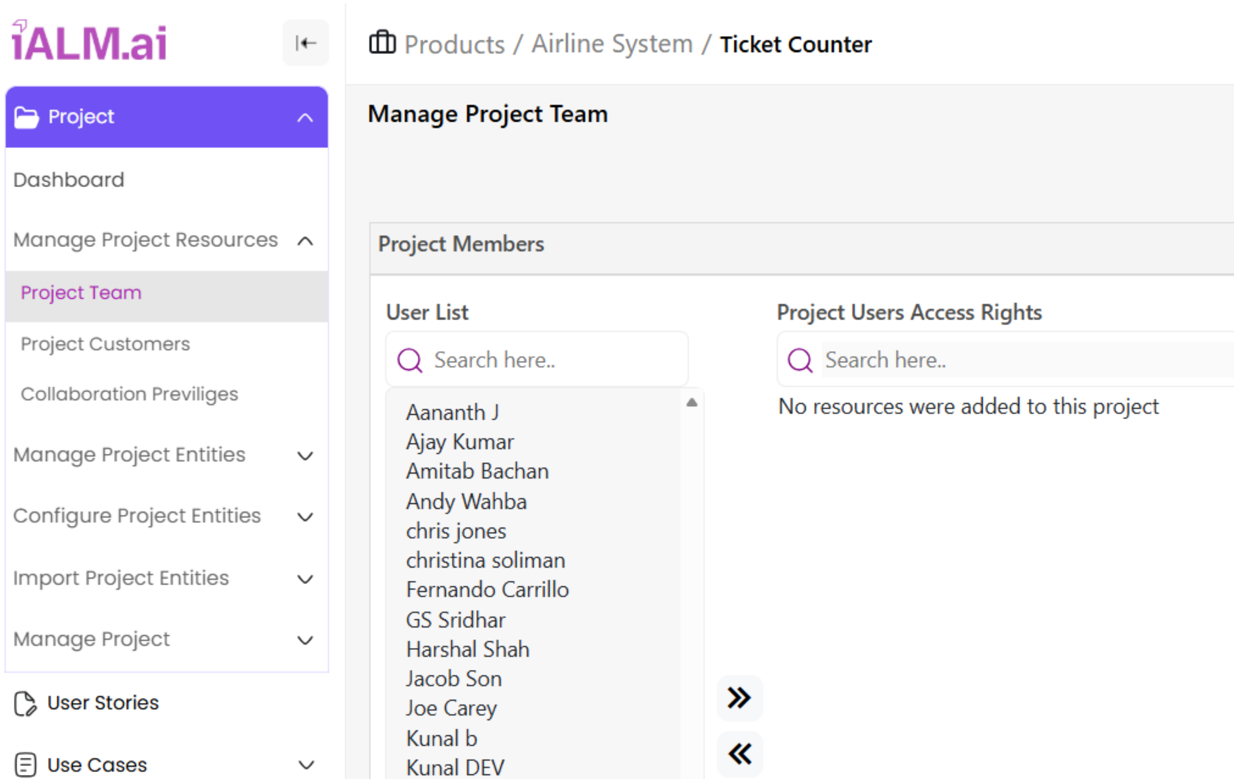

d. If you select the first option, you will see a list of all features currently in the Product Backlog that have not yet been included in any project. Select whichever features you wish to include and click on "Include". Then close the Product Backlog window.
e. If you select the second option, you will see a popup with a dropdown list of all releases. Select a specific release and you will see a list of all

features that the release manager planned for that release and have not been included in any project (see below). Select whichever features you wish to include in the project  and click "Include". Then close the popup.

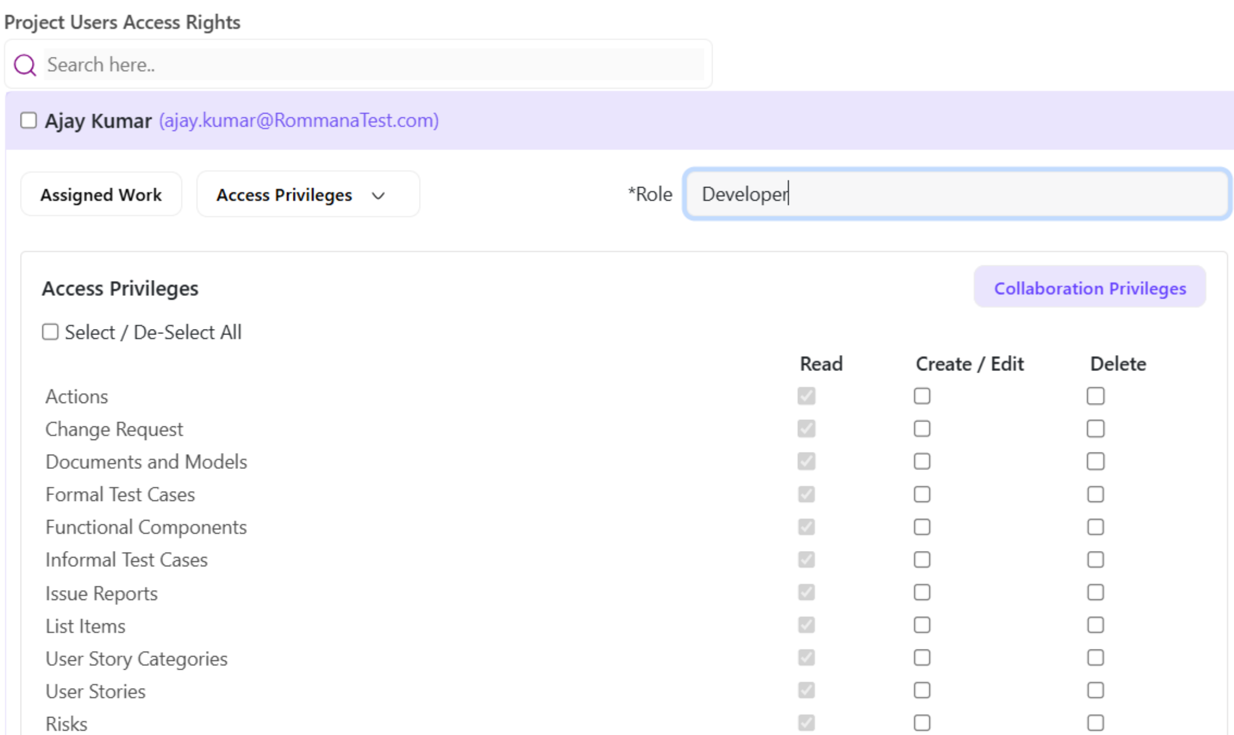



5. **Assigning Team Members to a Project**:

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. The Project Dashboard will be displayed.
d. From the left menu, select "Manage Project Resources" then select "Project Team"
e. Users who have been created for your site will be displayed on the left-hand side (See below). Simply select users whom you would like to have in your project team and move them to the right to assign them to the project.




f. You can now assign Access Privileges for a team member with respect to each type of project entities by clicking on down arrow labeled "Access Privileges". By default, all team members have "Read" access to all project entities.



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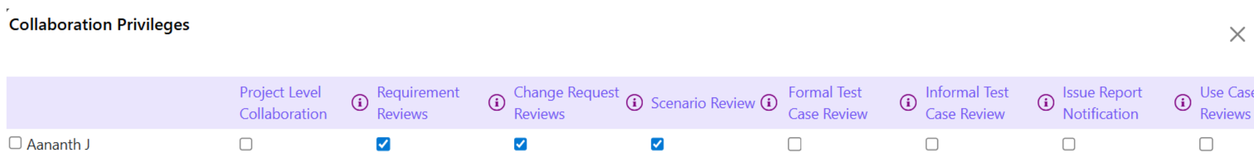
g. You can assign Collaboration Privileges to a team member with respect to different collaboration activities by clicking on "Collaboration Privileges" on the upper right corner. You will the screen below.
h. Make sure to scroll to the right and click save. When you return to the main screen, make sure to click save again to save the team assignment.




## 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.