IIBA® Vendor Showcase

Structuring & Managing Requirements

Wed. April 13, 2011

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Vision and Mission

Vision
The world's leading association for Business Analysis professionals

Mission
Develop and maintain standards for the practice of business analysis and for the certification of its practitioners

IIBA® is an international not-for-profit professional association for business analysts.
Tom Karasmanis

IIBA Chief Architect

- Tom Karasmanis is a Senior Consultant with over 23 years' experience in Information Technology, including roles as a business architect, business/systems analyst, project leader, technical architect, and software engineer. He has worked in healthcare, public sector, banking, financial services, insurance, supply chain, telecommunications, and retail.

- Tom serves as Chief Architect of the International Institute of Business Analysis (IIBA). He is a member of the IIBA Toronto Chapter. Tom also provides corporate training and is a speaker at events such as ProjectWorld*BusinessAnalyst World and Project World and World Congress for Business Analysts.

- Tom holds a Bachelor of Applied Science in Chemical Engineering from the University of Toronto and is active in the business analysis and business architecture communities.
Outline

- Introductions and Housekeeping 12:00
- Vendor Presentations 12:05
  - Serena 12:05
  - Polarion 12:18
  - Microfocus 12:31
- Coming Events 12:44
- Questions and Answers 12:45
- Close 12:59
- Extended Q&A 1:00

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Question and Answer

How to Ask Questions

- Use the Question box to ask questions. Selected questions will be answered at the end, but you can ask at any time.

- Include the vendors name if you want a specific vendor to respond.

- Short, specific questions, please!
Structuring & Managing Requirements

- Requirements structure and organization is critical to analyzing impact, understanding the effects of change, linking the solution to business goals, and reusing the knowledge and understanding gained.

- This webinar will focus on tools addressing the following tasks from the Business Analysis Body of Knowledge® (BABOK® Guide) v2.0:
  - 4.1 Manage Solution Scope & Requirements
  - 4.4 Prepare Requirements Package
  - 4.2 Manage Requirements Traceability
  - 4.3 Maintain Requirements for Reuse
  - 6.2 Organize Requirements
Orchestrate Your Requirements
Orchestrate Your Requirements with Serena

Orchestrate the entire process for rapidly delivering high-quality customer requirements – across all your teams, projects, and systems

Customers  Business Analysts  Developers  QA  Operations

Requirements Definition  Requirements Development  Requirements Validation

Capture  Prioritize  Prototype  Detail  Analyze  Deliver  Maintain

Get end-to-end visibility in a single place
Quickly coordinate processes across all stakeholders
Confidently manage changes & reuse
Today’s Specific Focus

Requirements Organization

The purpose of organizing requirements is to create a set of views of the requirements for the new business solution that are comprehensive, complete, consistent, and understood from all stakeholder perspectives.

• Managing Scope
• Traceability
• Reuse
• Impact

Dimensions RM
Prototype Composer
Serena Business Manager
Graphical Definition of Requirement Types and Relationships

- Business_Requirements
  - Model_Artifacts_to_BRs
  - BusinessReqs_to_UserReqs
  - User_Reqs_covered_BY_UseCases
  - UserReqs_to_FunctionalReqs

- User_Requirements
  - Use_Cases
    - UseCases_Verified_By_TestCases
    - Functional_Reqs_Verified_By_TestCases

- Functional_Requirements
  - Test_Cases
### Dimensions RM

Search & Sort on Information for Easier Reuse

#### Quick Search

<table>
<thead>
<tr>
<th>Category</th>
<th>Requirement ID</th>
<th>Title</th>
<th>Text</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MRKT_000021</td>
<td>Demo Req</td>
<td>A separate part of the business shall deal with exactly how the users' paragraphs become digitally encoded. Surface to say, they shall probably be sent in to our office where they shall be examined and written to a CD-ROM. These are referred to as the back office capabilities.</td>
</tr>
<tr>
<td></td>
<td>MRKT_000036</td>
<td>Demo Req 2</td>
<td>This document represents a comprehensive look at the issues relevant to such a product. As such, this represents the definitive source for the problem statement. All back office functions (scanning of original input materials and so on) are beyond the scope of this document.</td>
</tr>
<tr>
<td></td>
<td>MRKT_000023</td>
<td>Displaying stored photo info</td>
<td>The photo system shall allow users to display any of the information stored with the photo.</td>
</tr>
<tr>
<td></td>
<td>MRKT_000022</td>
<td>Photo meta info can be stored</td>
<td>The photo system shall allow users to store the following information about a photo: 1) photographer; 2)data photographed; 3) location; 4) event; 5) people in photo (including ages); 6) description; 7) keywords</td>
</tr>
<tr>
<td></td>
<td>MRKT_000020</td>
<td>Provide photo</td>
<td>The photo system shall allow users to apply various special</td>
</tr>
</tbody>
</table>

#### Sort by Column Headings

- **Quick Search**
- **Sort by Column Headings**

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Dimensions RM
Full Traceability from the Business to Implementation/Test
Orchestrate Your Way to Happier Customers

Comprehensive Collaboration

Actively engage customers on their requirements from initial request all the way to production release

Lightning-Quick Coordination

Work faster by breaking down the requirements silos across customers, teams, and tools

Quality with Confidence

Consistently deliver high-quality requirements in the face of constant change
Each program in the Being a BA series gives IIBA members a chance to ask experts for advice on topics such as technical excellence, the BA career, managing BAs, and more. These programs are call in shows, with an hour to talk with an expert in his or her specialty.

Participation qualifies for 1 CDU in category 2D (Professional Development)

**Effective Communication**
- Patricia Davies, Halina St James and Julian Sammy
  - First Tuesday every month at 12pm ET
  - May Topic: Stakeholder Management

**Your Career**
- Laura Brandenburg
  - Second Tuesday every month at 12pm
  - April Topic: Beyond Business Analysis

**Technical Excellence**
- Tom Karasmanis, IIBA Chief Architect
  - Last Tuesday every month at 12pm ET
  - April Topic: Business Analysis – What's In It For Me?

More Info and Registration: [http://theIIBA.org/PD](http://theIIBA.org/PD)
The Challenges of Requirements Management
Polarion Product Lifecycle Vision

Requirements Mgmt is where it all starts....
Leverage the RM work you have already done

- Import existing software requirement specification documents
- Configure what paragraphs should be marked as Requirements, Use- or Test-Cases.

**Imported documents preserve all content:**
- Document structure including headings
- Free form rich text content, chapters like: Introduction, Appendices, Index…
- Tables and Images are imported
- Requirements and/or other entities are recognized both based on keywords (Must, Should, ”Ability to”, etc) or using custom document styles.
• “Requirements may be baselined following approval. Any changes to requirements after baselining...involves the use of a change control process...”
  • BABOK Chapter 4.1.2, p. 64
“Tracing a requirement refers to the ability to look at a requirement and the others to which it is related.”
  - Chapter 4.2.2, p.67

“A specialized requirements management tool is generally needed to trace large numbers of requirements.”
  - Chapter 4.2.4.3, P. 70

“Requirements alone are not complex; it is the relationships and dependencies…that add the element of complexity…”
  - Chapter 6.2, p.103
How do you bring accountability to the process of vetting & implementing the inevitable change requests that happen during every project?

- **Impact Analysis**
  - Determine the impact proposed changes will have on other requirements, release timelines, resources, etc.
  - Flag suspect links when changes are made

- **Linking**
  - link 1 to many or many to 1 and do so across projects

- **Customizable Workflows and Approvals**

- **Visual Comparisons…..**
Traceability Matrices

Coverage Matrix

Traceability or Impact
Visual Change Comparisons

See the original requirements documents beside the new versions and see the changes highlighted.
“Identify requirements that are candidates for long term usage by the organization…”

• Polarion Requirements preserves and tracks the complete lifecycle of a user story over time.
• Stakeholders can leverage knowledge and reuse for future projects.
• For example, manage a requirements specification & related test cases in one place and reuse some or all of them when implementing some variant of the base specification in another project.
4.4 Prepare Requirements Packages

“Requirements should be presented in formats that are understandable by the stakeholder…”

Export Requirements Documents to MS Word

- **for Review** – document can be reviewed & commented, but the content is locked
- **for Prioritization** – external stakeholder can assign priorities and/or change any other work item fields.
- **for Collaboration** – user can modify both the free form document content or the requirements.

*The changes they make can be imported back into Polarion automatically!*
Every project is different...

- Different projects, different teams, different methodologies...
- “A popular methodology we see is “WaterScrumFall”…”

Support any Methodology

- Polarion supports Waterfall, Scrum and Hybrid models out of the box.
Leverage assets you already have...

Integrate with Tools used by other Roles in the Requirements Lifecycle (Architects, Developers, QA, CM, etc)

Sample Polarion Adapters (100+ available)

- Adapter to IBM Rational RequisitePro by agosense
- Adapter to IBM Rational Doors by agosense
- Adapter to Bugzilla by agosense
- Adapter to Atlassian JIRA by agosense
- Polarion Mylyn Connector by agosense
- Integration with Sparx Enterprise Architect™ by Polarion
- FastTrack™ Connector for Microsoft Visual Studio® by Polarion
- Integration with TOSCA Testsuite by TRICENTIS Technology & Consulting GmbH
- Integration with HP TestDirector™ by Polarion
- Adapter to HP Quality Center by agosense
- Adapter to Perforce by agosense
- Adapter to IBM Rational ClearCase by agosense

www.polarion.com
Polarion by the Numbers

- Founded in 2004, first release shipped in 2005
- Principal offices in the USA, Germany, UK, Czech Republic, Switzerland & Italy
- Business Partners in 15 additional countries
- 200+ Global 1000 enterprise deployments
- 1,000,000+ Licensed Users
- Thriving Open Source Community
- Profitable since Q4 2008
- 70% Compound Annual Growth Rate

Download a free trial, videos, and more at:

www.polarion.com/iiba
Join the Conversation

http://Community.theIIBA.org

- Group, blog and forum
IIBA® Membership

Member Benefits include:

- Webinars – exclusive access to talk to authors and experts in the profession
- Books 24x7 – $700 value, annually
- Quick Tips for Better Business Analysis™
- Full access to the Community Network
- Free downloads of
  - BABOK® Guide
  - IIBA Competency Model
- Discounted fees for the CBAP® and CCBA™ Exams
Structuring and Managing Requirements with Micro Focus Caliber®
Structuring vs. Managing is a Balancing Act
4.1 Manage Solution Scope & Requirements

- **Purpose:** Obtain and maintain consensus among key stakeholders regarding the overall solution scope and the requirements that will be implemented.

- **Challenges:**
  - Managing stakeholders
  - Baseline creation and management
  - Sign-off and electronic signature
4.1 Manage Solution Scope & Requirements

- Baseline creation can be done by authorized users
- Signatories can be set to match stakeholders
- Sign-offs can be customized to standards
- Initialize baseline from current position or older baseline
- Manage what you want as part of the baseline
  - Can create filters based on attribution to manage content
4.2 Manage Requirements Traceability

- **Purpose:** Create and maintain relationships between business objectives, requirements, other team deliverables, and solution components to support business analysis or other activities.

- **Challenges:**
  - Creation of relationships to various lifecycle artifacts and requirements
  - Impact analysis
  - Requirement coverage
4.2 Manage Requirements Traceability

- Create traces
  - Cross requirements
  - Cross-project
  - 3rd party ALM tools
  - Extensible through APIs
- Understand relationships and impacts
- Suspect flagging
- Use traceability matrix for coverage analysis
  - Filtering support advanced traceability analysis
4.3 Maintain Requirements for Reuse

- **Purpose:** To manage knowledge of requirements following their implementation.

- **Challenges:**
  - Creation of requirement libraries
  - Mapping/sharing of requirements
  - Search and filtering
4.3 Maintain Requirements for Reuse

- Consistent attribution across projects and teams
- Requirement mapping
  - Target requirement is updated automatically when source changes
- Cross-project filtering and search
4.4 Prepare Requirements Package

- **Purpose:** To select and structure a set of requirements in an appropriate fashion to ensure that the requirements are effectively communicated to, understood by, and usable by a stakeholder group or groups.

- **Challenges:**
  - Effective communication and language for communication
  - Collaboration
  - Documentation
4.4 Prepare Requirements Package

- Glossary support
  - Common terms
  - Ambiguous terms
- Collaboration
  - Threaded discussion
  - Register for notification of changes
- Document generation
  - Supports requirement filtering
  - Highly configurable documentation templates to meet organization standards
  - Easily shared across any/all stakeholders
  - Can include requirement, traceability and other associated information
6.2 Organize Requirements

- **Purpose:** to create a set of views of the requirements for the new business solution that are comprehensive, complete, consistent, and understood from all stakeholder perspectives.

- **Challenges:**
  - Flexible containment
  - Consistency
    - Requirement standards
    - Documentation standards
  - Configurable views
  - Ensuring completeness
6.2 Organize Requirements

- **Containment**
  - Projects
    - Baselines
      - Requirement types
    - Simple requirement hierarchy
- **Consistent attribution**
  - Ensures required information available to stakeholders
- **Cross-project views and bulk editing**
  - Work on requirements across projects and baselines in a bulk-data editor
- **Complete/comprehensive**
  - Rich text editor with inline images; Traceability; Discussions; References; full change history and baselines
  - Requirement definition and prototyping capabilities available
Summary of Capabilities Aligned with BABOK

- Managing stakeholders
- Baseline creation and management
- Sign-off and electronic signature
- Creation of relationships across requirements and third-party tools
- Impact analysis
- Requirement coverage
- Creation of requirement libraries
- Mapping/sharing of requirements
- Search and filtering

Organize requirements
- Flexible containment
- Consistency
- Configurable views
- Ensuring completeness

Prepare requirements package
- Glossary and ambiguity checking
- Collaboration
- Documentation

Maintain requirements for re-use
- Glossary and ambiguity checking
- Collaboration
- Documentation

Manage solution scope & requirements
- Managing stakeholders
- Baseline creation and management
- Sign-off and electronic signature

Manage Requirement Traceability
- Creation of relationships across requirements and third-party tools
- Impact analysis
- Requirement coverage
Scrum is becoming one of the most utilized processes in software development community. We live in an environment where budgets are fixed and requirements are constantly changing. The BA is the enabler of this whole process; they are responsible for understanding customer requirements and making sure the software team understands them.
Are you trying to decide on software to help improve your business analysis practice? The Vendor Showcase is for you! In each webinar we ask tool vendors to show how their products address specific tasks and techniques BABOK® Guide.

Episode 2:
Wed, May 13, 2011
Noon EDT (UTC-4 hours)

More Info and Registration: http://theIIBA.org/PD
This webinar is for everyone.
Question and Answer

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