Looking for a Career?

Visit IIBA Career Centre

- Search for and apply to local, *business analyst* positions.
- Let employers find you. Market yourself by posting a resume, professional profile, and portfolio of work.
- Store versions of your resume, cover letters, and contact information.
- Set-up job alerts to be emailed when new jobs are posted.
- IIBA.org - careers
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 Product Manager

- Tom Karasmanis is a Senior Consultant with 25 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 financial services, publishing, healthcare, public sector and telecommunications.

- Tom served as Chief Architect of the IIBA from 2009 to 2011. He is currently IIBA Product Manager of Being a BA: Technical Excellence and Vendor Showcase. Tom is a management consultant in business architecture and business analysis, assisting organizations to build or improve their BA practices. He speaks regularly at international conferences.

- 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
  - Polarion  12:05
  - TraceCloud  12:20
  - YONIX  12:35
- Questions and Answers  12:50
- Close  12:59
- Extended Q&A  1:00
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 vendor’s name if you want a specific vendor to respond.
- Short, specific questions, please!

IIBA Host
Tom Karasmanis

Gian Giacomo Ermacora
Nathan Reddy
Jody Bullen

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Plan Business Analysis Activities  Task 2.3

Agenda

- Purpose
- Activities
- Challenges
- Considerations
Plan Business Analysis Activities

Purpose

- Determine:
  - Deliverables to be produced
  - Activities to be performed
- Estimate the effort required
- Describe how progress of activities and deliverables will be tracked and reported
Plan Business Analysis Activities

Purpose

- What does “done” look like (for BA)
- How will you get to “done”
- How Long and How Much?
Plan Business Analysis Activities

Inputs

- Business Analysis Approach
- Business Analysis Performance Assessment
- Organizational Process Assets
- Stakeholder List, Roles, & Responsibilities
Plan Business Analysis Activities

Detailed activities (plan-driven):

- Identify BA deliverables
  - Reviewers and Approvers → Sign-off !! ** !!
- Determine scope of BA work
- Determine activities
- Estimate BA work
- Status template and schedule
Plan Business Analysis Activities

Challenges

- Requirements at high level still
  - Difficult to estimate the longer you go out
  - i.e. the more detailed you get

- Do high level long-term plan
  - Do detailed short-term plan in increments (nothing to do with iterative development)

- Moves toward an Agile approach
Plan Business Analysis Activities

Detailed activities (change-driven):

- Planning activities are ongoing
- Deliverables are user stories, backlog
- Per sprint
  - Estimate/prioritize new/updated user stories
  - Update backlog
  - Report sprint and overall progress
Plan Business Analysis Activities

Considerations

- Geographic Distribution of Stakeholders
  - Collocated, Dispersed, Outsourced

- Project Type
  - Green Field, COTS, Compliance, Org Change
Polarion® ALM™

"Plan Business Analysis Activities"
PBAA - In a Nutshell

✓ Understand the **goals**
✓ Define what needs to be done
✓ Define **who** should do the job
✓ Estimate and *plan the activities*

**WHAT**
**HOW**
**WHO**
**WHEN, HOW LONG**

MEETINGS, CHECKLISTS, COLLABORATION, ESTIMATION, STATUS, TRACKING
Your Boss comes in and says:

„WE NEED TO IMPLEMENT AN ALM SOLUTION“

„ASAP“
Understand the goals

• The first step is to **understand** what actually **needs to be done**.

• Various techniques and approaches are available and can be used for it.
  ✓ Independent of what technique you use checklists and templates are a helpful starting point not to forget helpful things
• What do checklists usually contain:
  ✓ Summary/Purpose;
  ✓ Structure and descriptions;
  ✓ Actions to be done.

• Typical problems when using MS Office
  ✓ Difficult to Share and collaborate
  ✓ Difficult to track and manage deliverables
  ✓ Difficult to track related activities
• **Central Pool** for check lists which can *easily* be reused and *shared globally*

• Checklists can be part of project templates.
  ✓ Each initiative can have different templates

• **Deliverables** can be tracked as objects (similar to requirements)
  ✓ Easy to *manage*
  ✓ Easy to share
  ✓ Easy to *assign*
• Screenshots
  
  • Screenshot with a list of checklists
  • Screenshot with an example checklist
  • Screenshot to show how checklists can be exported to word and imported back again
  • Screenshot to show how checklists can be created out of word documents
## Basic Test Documentation Templates

Ready to use templates to document your test plans and test cases.

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Test Plan</td>
<td>Describes the scope, approach, resources, and schedule of intended testing activities. It identifies test items, the features to be tested, the testing tasks, who will do each task, and any risks requiring contingency planning.</td>
<td>Create new</td>
</tr>
<tr>
<td>Test Specification</td>
<td>Collects test cases that are intended to be used to test a software feature or combination of software features and specifies the details of the test approach.</td>
<td>Create new</td>
</tr>
</tbody>
</table>

## Software Engineering Documents

We have prepared a set of software development documents firmly based on IEEE standards.

<table>
<thead>
<tr>
<th>Document</th>
<th>Description</th>
<th>Actions</th>
</tr>
</thead>
<tbody>
<tr>
<td>Software Project Management Plan</td>
<td>Description of the software approach and associated milestones</td>
<td>Create new</td>
</tr>
<tr>
<td>Software Requirements Specification</td>
<td>Description of the expected software features, constraints, interfaces and other attributes.</td>
<td>Create new</td>
</tr>
<tr>
<td>Software Design Description</td>
<td>Description of how the software will meet the requirements. Also describes the rationale for design decisions taken.</td>
<td>Create new</td>
</tr>
<tr>
<td>Software Test Plan</td>
<td>A document describing the scope, approach, resources, and schedule of intended testing activities. It identifies test items, the features to be tested, the testing tasks, who will do each task, and any risks requiring contingency planning.</td>
<td>Create new</td>
</tr>
<tr>
<td>Software Test Design Specification</td>
<td>A document specifying the details of the test approach for a software feature or combination of software features and identifying the associated tests.</td>
<td>Create new</td>
</tr>
<tr>
<td>Software Test Case Specification</td>
<td>A document specifying inputs, predicted results, and a set of execution conditions for a test item.</td>
<td>Create new</td>
</tr>
</tbody>
</table>
Checklists / Deliverables

5 POC Goals

In this section you should list all goals for the POC. Below you can find some example POC goals. During the POC you will evaluate if your goals can be achieved by using Polarion.

Example: Have a common platform which contains all requirements, so that we always have an overview on the status of the requirements

- Example: Customize requirements to our process
- Example: Ensure traceability throughout the project

6 Scope And Activities

Send Polarion Installation Checklist to customer to prepare installation
Attach to this item or update received ‘Polarion Installation Checklist’ from customer using word round-trip.

Update this Polarion POC document with relevant data
- POC goals
- POC team and location
- POC schedule

If you receive similar document from customer attach the document you have received to this work item.

Polarion POC Server Installation
This session is designed to include the site IT System Administrator who will be administrating all facets of the Polarion server instances, including installation, configuration and tuning, security and patch compliance, and software upgrade.

Preparation: Polarion Installation Checklist
## Activities

<table>
<thead>
<tr>
<th>Outline Numb</th>
<th>Title</th>
<th>Status</th>
<th>Assignee(s)</th>
<th>Time Point</th>
<th>Created</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>MP-270 Polarion POC</td>
<td></td>
<td></td>
<td></td>
<td>2011-02-08 20:18</td>
</tr>
<tr>
<td>1</td>
<td>Overview</td>
<td></td>
<td></td>
<td></td>
<td>2011-02-08 20:27</td>
</tr>
<tr>
<td>2</td>
<td>Please Do Not Forget</td>
<td></td>
<td></td>
<td></td>
<td>2011-05-14 22:49</td>
</tr>
<tr>
<td>3</td>
<td>POC Team And Place</td>
<td></td>
<td></td>
<td></td>
<td>2011-05-14 21:52</td>
</tr>
<tr>
<td>4</td>
<td>References / Links</td>
<td></td>
<td></td>
<td></td>
<td>2011-02-08 20:38</td>
</tr>
<tr>
<td>5</td>
<td>POC Goals</td>
<td></td>
<td></td>
<td></td>
<td>2011-02-08 20:18</td>
</tr>
<tr>
<td></td>
<td>Scope And Activities</td>
<td></td>
<td></td>
<td></td>
<td>2011-02-08 20:24</td>
</tr>
<tr>
<td>6-1</td>
<td>Send Polarion Installation Checklist to customer</td>
<td></td>
<td></td>
<td></td>
<td>2012-02-01 23:17</td>
</tr>
<tr>
<td>6-2</td>
<td>Update Polarion POC template with customer data</td>
<td></td>
<td></td>
<td></td>
<td>2012-02-01 23:18</td>
</tr>
<tr>
<td>6-3</td>
<td>Polarion POC Server Installation</td>
<td></td>
<td></td>
<td></td>
<td>2011-08-29 16:10</td>
</tr>
<tr>
<td>6-4</td>
<td>Core Team Training</td>
<td></td>
<td></td>
<td></td>
<td>2011-08-29 16:10</td>
</tr>
<tr>
<td>6-5</td>
<td>Process Implementation</td>
<td></td>
<td></td>
<td></td>
<td>2011-08-29 16:44</td>
</tr>
</tbody>
</table>
THE USABILITY OF WORD WITHOUT ANY OF THE LIMITATIONS.

The **Polarion Import Wizard** easily recognizes and imports documents that contain requirements, test cases, defects, etc. to a modern, web-based management platform.

- **Imported look and edit exactly like the source documents**
- **Document "RoundTrip"™**
  Changes made outside of Polarion can be imported back
  - The same for MS Excel!
Meetings / Communication

• **Planning** and the **identification** of activities will typically involve:
  
  ✓ **Meetings** ➔ Meeting minutes  
  ✓ **Action items** ➔ activities, due dates, assignments  
  ✓ **Questions, Collaboration** ➔ questions, answers, decisions  
  ✓ **Status** ➔ time tracking, status tracking

• Typical **problems** are:
  
  ✓ „Where are the meeting minutes?“  
  ✓ „What are my activities?“  
  ✓ „Who was responsible for that?“
Track and share meeting minutes as you would do in MS Office:
- Shared, available for anybody in the team via web;
- Indexed (no folder chaos).

Track action items as part of your meeting minutes:
- Action items will become objects which can be tracked
- Automatically become part of your project artifacts

Task lists for anybody in the team. Twitter like collaboration.
Meeting Minutes

Meeting_20120713

1 Kick Off Meeting - July 13
1.1 Participants
1.2 Agenda
1.3 Open Issues - Last Meeting(s)
1.4 Action items

1 Kick Off Meeting - July 13
Purpose: Kick Off ALM Rollout

1.1 Participants
Ken Analyst, Steve Developer, Max Manager

1.2 Agenda
Identity Goals and Deliverable of new project “ALM Rollout”

1.3 Open Issues - Last Meeting(s)

<table>
<thead>
<tr>
<th>ID</th>
<th>Title</th>
<th>Status</th>
<th>Assignee</th>
</tr>
</thead>
<tbody>
<tr>
<td>EL-299</td>
<td>Capture High Level Deliverables</td>
<td>Open</td>
<td>John Requirement</td>
</tr>
</tbody>
</table>

1.4 Action Items

- EL-321 - break down business goals
- EL-322 - Review if we have some departments within our company which already use ALM tools
- EL-376 - Ensure we execute the requirement
• Communication

My Polarion

Welcome System Administrator! This is your personal Polarion home page. You can fully customize it to show the information of greatest interest to you.

Awaiting My Approval

This table shows Work Items that are assigned to you and require your attention. If there are no items of interest right now, modify the query to find the Work Items that interest you most.

My Templates

- Business Requirements
- Functional Requirements
- Software Design Description
Estimate and Plan

- Create a **Work Breakdown Structure** e.g. Taking deliverables

- **Typical Problems are:**
  - Deliverables are in documents (Office) *activities* are part of plans (tracking tool, Project Management tool);
  - Did we plan everything?
  - Difficult to *collaborate* as *task assignment* and *deliverables* are not in same container.
• **Easily** break down deliverables in *tasks* and *activities*;

• Action items from meeting notes can be linked to deliverables and vice versa;

• **Work Breakdown Structure** can easily be estimated and planned to iterations and releases;

• Status and task **tracking**.
WBS

- Release Planning

Score Board

- Planned Requirements for Version 1.0
  - Accepted (waiting for implementation): 12
  - Implemented (not verified yet): 4
  - Verified: 11

To plan an item for release select items that are approved but not yet accepted, accept them and set the target release to ‘Version 1.0’.

Progress

Remaining work: 720 (Man Hours)

Graph showing release progress and prediction.
WBS

Iteration Planning

Sprint Board for i34 (2012-05-29 - 2012-06-12)

Release Backlog: Releases.Version1.0

Total of 9(8) items, 5(#) not started, 0(0) in progress, 2(0) waiting for QA, 0(0) done. Items assigned to current user “admin” are highlighted.

<table>
<thead>
<tr>
<th>To do</th>
<th>In progress</th>
<th>Done</th>
<th>Verified</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="EL-15 - Failed: com.polarion.demo.LoginTest.testLogin" /></td>
<td></td>
<td></td>
<td><img src="image" alt="EL-58 (3d)" /> <img src="image" alt="EL-56 (4d)" /> <img src="image" alt="EL-57" /></td>
</tr>
<tr>
<td><img src="image" alt="EL-109 - Search for a book by advanced properties (4d)" /> (#)</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="EL-112 - User likes to search also by any content - so full-text search is needed" /> (40) (#)</td>
<td><img src="image" alt="EL-48 (2h)" /> <img src="image" alt="EL-42 (2h)" /> <img src="image" alt="EL-47 (2h)" /></td>
<td></td>
<td><img src="image" alt="EL-68" /> <img src="image" alt="EL-69" /></td>
</tr>
<tr>
<td><img src="image" alt="EL-131 - EBook - supported readers (3d) (#)" /></td>
<td><img src="image" alt="EL-89 (3h)" /> <img src="image" alt="EL-81 (8h)" /></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="EL-132 - Advanced searching should provide an easy way to construct complex search queries..." /> (10d) (#)</td>
<td></td>
<td><img src="image" alt="EL-69" /> <img src="image" alt="EL-68" /></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="EL-135 - Configure contact information." /> (10d) (#)</td>
<td></td>
<td><img src="image" alt="EL-75" /></td>
<td></td>
</tr>
</tbody>
</table>

Created: 2012-05-21 15:00, Updated: 2012-06-29 11:32

- Sprint progress: 371 / 440
- Team capacity: 55d
## Time Tracking

- **EL-322** - Review if we have some departments within our company which
  - Sun: 2h
  - Total: 2h

- **EL-321** - break down business goals
  - Sun: 4h
  - Total: 4h

- **EL-299** - Capture High Level Deliverables
  - Sun: 0h
  - Total: 0h

---

**Total: 6h**
Polarion ALM

Next Steps

Download 30-day FREE trial
Try it LIVE
Request proof of concept
Watch demo
For more information visit our website

www.polarion.com

Thank You!
PLANNING BA ACTIVITIES

Using TraceCloud

nathan@tracecloud.com
Requirements Management - R - US

Collaboration, Ease of Use, Dashboards, MSOffice Integration
TraceCloud = Collaborative Requirements Management.

- Requirements Change Management and Traceability
- Agile or Iterative Waterfall
- Dashboards
- MS Office (Word / Excel)
What is TraceCloud?

TraceCloud is a Web2.0 SAAS / On Premises Requirements Management solution. We understand that Requirements Management is an overhead, and we try to make the entire effort easy, fast and productive.

- Use Excel, Word to import your Requirements
- Define your Requirement types and attributes to suit your needs
- Use folders to organize and manage your Requirements

- Easy, yet powerful Traceability
- Generate/Save Trace reports that show hierarchy of relationships
- Understand change impact
- Export to Excel, PDF or Word

- Lock down folders
- Define roles and privileges
- Control change
- Use built in approval workflow and change notification

- Dashboards with built in Reports and Trend charts let you track progress at Project, Release, and User levels
- Easily identify trouble spots before they go out of control
**BA Activities**

**Pre Planning**
- Define RMP
- Set up Project, Roles, Permissions, Structure
- Requirements, Traceability, Approval

**Planning**
- Identify tasks
- Owners and Effort required
- Prioritization
- Blocked, Progress, Completion
- Next Iteration planning

**Post Planning**
- Dashboards
- Release Planning
- Word & Excel
- Shared Requirements
## Pre Planning – Define RMP

<table>
<thead>
<tr>
<th>Requirement Types</th>
</tr>
</thead>
<tbody>
<tr>
<td>Attributes</td>
</tr>
<tr>
<td>Folder structure</td>
</tr>
<tr>
<td>Roles</td>
</tr>
<tr>
<td>Permissions</td>
</tr>
<tr>
<td>Traceability Rules</td>
</tr>
<tr>
<td>Change Impact Analysis</td>
</tr>
<tr>
<td>Change Management</td>
</tr>
<tr>
<td>Approval Work Flow</td>
</tr>
<tr>
<td>Tracking Change Acceptance</td>
</tr>
</tbody>
</table>
Pre Planning
Flexibility in mapping process to tool
Pre Planning
Flexibility in defining Roles and Permissions (Change Control)

<table>
<thead>
<tr>
<th>Role Accessibility Req Generators</th>
<th>Edit Role Privileges</th>
<th>Add Users</th>
<th>Edit Users</th>
<th>Delete Role</th>
</tr>
</thead>
</table>

**Edit Permissions for Users in Role**

<table>
<thead>
<tr>
<th>Folder Path</th>
<th>Create Requirement</th>
<th>Road Requirement</th>
<th>Update Requirement</th>
<th>Delete Requirement</th>
<th>Trace Requirement</th>
<th>Approve Requirement</th>
<th>Upeditable Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><img src="image" alt="Business Requirement" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Business Requirement/Abhinav" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td><img src="image" alt="Business Requirement/Administration Requirements" /></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Attributes**
- collateral
- Customer
- Deliverability
- Impact to customer
- Severity
Pre Planning
Build your requirements, collaborate, collect additional information...
## Pre Planning

### Traceability (Link dependent requirements to each other)

<table>
<thead>
<tr>
<th>Trace Matrix</th>
</tr>
</thead>
<tbody>
<tr>
<td>Trace From</td>
</tr>
<tr>
<td>Functional Requirements</td>
</tr>
<tr>
<td>Req per page: 20</td>
</tr>
<tr>
<td>Filter criteria</td>
</tr>
<tr>
<td>Trace To</td>
</tr>
<tr>
<td>Business Requirement</td>
</tr>
<tr>
<td>Req per page: 20</td>
</tr>
<tr>
<td>Filter criteria</td>
</tr>
</tbody>
</table>

| Next pages (From): 1 | 2 |
| Next pages (To): 1 | 2 | 3 | 4 | 5 | 6 | 7 |

<table>
<thead>
<tr>
<th><strong>To Req</strong> →</th>
<th><strong>From Req</strong> ↓</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>FR-288</strong>: A should be able to see Folder Metrics by clicking on Folder Metrics button on the right and then</td>
<td></td>
</tr>
</tbody>
</table>

| **BR-626**: 2. Formal, defined steps to facilitate the implementation of the audit and this is required |
| **BR-626**: 1. Accountability policy and associated audit and accountability controls is not required |
| **BR-627**: The control system shall not generate audit records, at a minimum, for the following events whether... |

**Action**

| **BR-628**: 1. Attempts to Sign On; |
| **BR-628**: 2. Attempts to change local account attributes such as privileges shall not be made |
| **BR-630**: 3. Attempts to change local security policy is permitted |
| **BR-631**: The organization shall NOT develop, implement, and periodically review and update |
| **BR-632**: 1. A formal, documented, control system security policy that addresses |

---

FR-289: In the Approval Workflow section of Folder Metrics, we should have a pie chart showing Approved Req...
Pre Planning
Traceability (Build Trace Tree reports to see dependencies)

[Trace Tree Report]

<table>
<thead>
<tr>
<th>Trace Tree</th>
<th>Requirement (Tag : Version : Name)</th>
<th>Testing Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>REL-3</td>
<td>REL-3 : Ver-1 : User Dashboard</td>
<td>Fail</td>
</tr>
<tr>
<td>BR-12</td>
<td>BR-12 : Ver-6 : Administrator should be able to add a comma separated list of users as Administrators in the Add User page</td>
<td>Pending</td>
</tr>
<tr>
<td>FR-15</td>
<td>FR-15 : Ver-1 : Administrator should be able to create a Project Core Info page for any project</td>
<td>Pending</td>
</tr>
<tr>
<td>TC-17</td>
<td>TC-17 : Ver-1 : Administrator should be able to remove any user from the administrator role in the Edit Users page</td>
<td>Pending</td>
</tr>
<tr>
<td>TR-33</td>
<td>TR-33 : Ver-1 : Administrator should be able to create a new requirement type</td>
<td>Pending</td>
</tr>
<tr>
<td>TC-372</td>
<td>TC-372 : Ver-1 : Administrator should be able to remove any user from the administrator role in the Edit Users page</td>
<td>Pending</td>
</tr>
<tr>
<td>TR-33</td>
<td>TR-33 : Ver-1 : Administrator should be able to create a new requirement type</td>
<td>Pending</td>
</tr>
</tbody>
</table>
Planning

- Define an Iteration & Build a team
- Identify tasks
- Owners and Effort required
- Prioritization
- Blocked, Progress, Completion
- Next Iteration planning
Planning

Define an iteration, build a team
Planning

Identify tasks for this iteration
### Planning

Assign owners and estimate effort

<table>
<thead>
<tr>
<th>Not Started</th>
<th>15 Tasks</th>
<th>6/16 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(0) <a href="mailto:sami@tracecloud.com">sami@tracecloud.com</a></td>
<td>8/16 hrs</td>
<td></td>
</tr>
</tbody>
</table>

**Action**
- Remove from this sprint
- Move to another owner
- Set task weight (importance)
- Set Status to In Progress
- Set Status to Blocked
- Set Status to Completed
- Set effort remaining (hrs)

**Notes**
- BR-622.1: Ver-4: This tool should be able to work with excel.
- BR-919: Ver-5: Excel upload/modify attribute does not add to requirement log. We need to fix this. This is a great idea. Let's implement it and see how the users love it. I think it will be a big win - Nathan.

<table>
<thead>
<tr>
<th>In Progress</th>
<th>4 Tasks</th>
<th>0/0 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(0) <a href="mailto:sami@tracecloud.com">sami@tracecloud.com</a></td>
<td>0/0 hrs</td>
<td></td>
</tr>
</tbody>
</table>

**Action**
- BR-1008.1: Ver-1: Respond to CMC query
- BR-1008.1: Respond to CMC with a video.

<table>
<thead>
<tr>
<th>Blocked</th>
<th>2 Tasks</th>
<th>0/0 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(0) <a href="mailto:nathan@tracecloud.com">nathan@tracecloud.com</a></td>
<td>0/0 hrs</td>
<td></td>
</tr>
</tbody>
</table>

**Action**
- FR-404: Ver-1: Administrator should be able to add a comma separated list of users for any Role in the Add Users page.
- Administrator should be able add a comma separated list of users as Administrators in the Add Users page.
- Good ideas!!

<table>
<thead>
<tr>
<th>Completed</th>
<th>1 Task</th>
<th>0/0 Hours</th>
</tr>
</thead>
<tbody>
<tr>
<td>(0) <a href="mailto:nathan@tracecloud.com">nathan@tracecloud.com</a></td>
<td>0/0 hrs</td>
<td></td>
</tr>
</tbody>
</table>

**Action**
- FR-403: Ver-1: Administrator should not be able to add a comma separated list of users as Administrators in the Add Users page.
Planning

Prioritize tasks (taking effort and owners into consideration)
### Planning

**Track Progress:** Not Started ➔ In Progress ➔ Blocked ➔ Completed

---

**Daily Scrum**

- Add Tasks to Sprint (Eg Br-1 FR-3 BR-33)
- Move ALL Tasks to
- Show ONLY tasks owned by

---

<table>
<thead>
<tr>
<th>Status</th>
<th>Task ID</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Not Started</td>
<td>BR-946</td>
<td>A User should be able to create sub folders within a Folder by clicking on</td>
</tr>
<tr>
<td></td>
<td></td>
<td>the tab &quot;Create Folder&quot; A User should be able to create sub folders within</td>
</tr>
<tr>
<td></td>
<td></td>
<td>a Folder by clicking on the tab &quot;Create Folder&quot;</td>
</tr>
<tr>
<td></td>
<td>BR-948</td>
<td>A User should be able to create Trace To for any previously created</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Requirement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:nathan@tracecloud.com">nathan@tracecloud.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-946: Ver-1: A User should be able to create sub folders within a Folder</td>
</tr>
<tr>
<td></td>
<td></td>
<td>by clicking on the tab &quot;Create Folder&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>A User should be able to create sub folders within a Folder by clicking on</td>
</tr>
<tr>
<td></td>
<td></td>
<td>the tab &quot;Create Folder&quot;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:nathan@tracecloud.com">nathan@tracecloud.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-948: Ver-1: A User should be able to create Trace To for any previously</td>
</tr>
<tr>
<td></td>
<td></td>
<td>created Requirement</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:cybhan@gmail.com">cybhan@gmail.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-634: Ver-1: personnel and assets; personnel and assets;</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:apraneel@digitel.com">apraneel@digitel.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-627: Ver-4: The control system shall not generate audit records, at a</td>
</tr>
<tr>
<td></td>
<td></td>
<td>minimum, for the following events whether or The control system shall</td>
</tr>
<tr>
<td></td>
<td></td>
<td>generate audit records, at a minimum, for the following events whether or</td>
</tr>
<tr>
<td></td>
<td></td>
<td>not the attempts were successful:</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:apraneel@digitel.com">apraneel@digitel.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-630: Ver-3: Attempts to change local security policy is permitted</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:apraneel@digitel.com">apraneel@digitel.com</a> 0.0 hrs</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-121: Ver-3: Administrator should be able to add a comma separated list</td>
</tr>
<tr>
<td></td>
<td></td>
<td>of users for any Role in the Add Users page</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Administrator should be able add, a comma separated list of users for any</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Role in the Add Users page to every one</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(55) <a href="mailto:nathan@tracecloud.com">nathan@tracecloud.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-1358: Ver-1: demo to digitel demo to digitel</td>
</tr>
<tr>
<td></td>
<td></td>
<td>(0) <a href="mailto:jeremy.aokroyd@uk.fujitsu.com">jeremy.aokroyd@uk.fujitsu.com</a></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Action</td>
</tr>
<tr>
<td></td>
<td></td>
<td>BR-121: Ver-3: Administrator should be able to add a comma separated list</td>
</tr>
<tr>
<td></td>
<td></td>
<td>of users for any Role in the Add Users page</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Administrator should be able add, a comma separated list of users for any</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Role in the Add Users page to every one</td>
</tr>
</tbody>
</table>
Planning

Track Progress: Trends at an Iteration level

### Project Trends

![Sprint Dashboard]

### All Requirements in Project

![Graph showing requirements trend]

### Agile Sprint Metrics as of 31 January 2012 01:00:08 AM

<table>
<thead>
<tr>
<th>Requirement Type</th>
<th>Approval</th>
<th>Traceability</th>
<th>Testing</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All Draft Pending Rejected Approved Dangling Orphan Suspect Upstream Suspect Downstream Pending Pass Fail Completed Incomplete</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>BR</td>
<td>1 0 1 0 0 1 1 0 0</td>
<td>0 0 1 0 1 0 1 0 0</td>
<td>1 0 0 0 0 0 0 0 0</td>
<td>1</td>
</tr>
<tr>
<td>FR</td>
<td>1 0 0 0 0 0 0 0 0</td>
<td>0 0 0 0 0 0 0 0 0</td>
<td>0 0 0 0 0 0 0 0 0</td>
<td>4</td>
</tr>
</tbody>
</table>
Planning

Next Iteration: Easily move all incomplete tasks/requirements to next iteration
Post Planning – Dashboards

Slice and Dice at Will

Rich built in reporting & dashboard system

Canned reports at various levels
- User
- Folder
- Baseline
- Release
- Project
- Iteration

Trends and Metrics at various levels
- User
- Folder
- Baseline
- Release
- Iteration
- Project
## Post Planning – Dashboards

### User Dashboard

### Nathan Reddy's Dashboard

<table>
<thead>
<tr>
<th>Requirement Type</th>
<th>Approval</th>
<th>Traceability</th>
<th>Testing</th>
<th>Completion</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>All Draft Pending Rejected Approved</td>
<td>Suspect Upstream Suspect Downstream Pending Pass Fail</td>
<td>Completed Incomplete</td>
<td></td>
</tr>
<tr>
<td>BR</td>
<td>1064 1042 42 0 0</td>
<td>982 985 5 31</td>
<td>1010 1 73 11</td>
<td>1073</td>
</tr>
<tr>
<td>Cisco_TCD_BR</td>
<td>0 0 0 0 0</td>
<td>0 0 0</td>
<td>0</td>
<td>0</td>
</tr>
<tr>
<td>DEF</td>
<td>68 68 63 1</td>
<td>0</td>
<td>60 0 0 0</td>
<td>68</td>
</tr>
<tr>
<td>FRT</td>
<td>276 276 1 0 0</td>
<td>275 69 1</td>
<td>0</td>
<td>276 1 0 3</td>
</tr>
<tr>
<td>GL</td>
<td>73</td>
<td>0 0 0</td>
<td>0</td>
<td>73</td>
</tr>
<tr>
<td>REL</td>
<td>0</td>
<td>0 0 0</td>
<td>0</td>
<td>0 0 0 0</td>
</tr>
<tr>
<td>TC</td>
<td>622 612 68 2 1</td>
<td>617 2 3 1</td>
<td>621</td>
<td></td>
</tr>
<tr>
<td>TR</td>
<td>234</td>
<td>231 224 2 0</td>
<td>217 6 11 0</td>
<td>234</td>
</tr>
</tbody>
</table>

### General Reports
- My Reqs
- My Reqs Changed After mmtddyyyy
- My Completed Reqs
- My Incomplete Reqs

### Approval Workflow Reports
- Reqs in Approval Workflow Work Flow Status
- Reqs that are Work Flow Status

### Defect Reports
- Defects in Defect Status

### Traceability Reports
- My Reqs Traceability Condition

### QA (Quality Assurance) Reports
- My Reqs that have Testing Status

### My Private Reports
- No Reports Found

### My Public Reports
- 2000 rows per page
- 2000 rows sort by severity desc
- Bug report with customer attributes not showing up
- can't demo
- Demo to Divya
- Demo to Joseph
- demo to Mallesh
- Hemi's BRs
- Incomplete 1,2 Bugs & enhancements
- My Business Requirements
- Richards demo
- Auto Plot Trace Tree

### My Private Docs
- No Documents Found

### My Public Docs
- Cisco Demo Doc
- test
- Demo to Mary Gerush
- demo
- test aim
- dave demo doc
- cisco demo to bc
- riggy demo
- test embedded report
- Word formatting
- demo with incorrect/​uifly
- test
Post Planning – Dashboards

Folder Dashboard

Business Requirements Demo to Amdocs

<table>
<thead>
<tr>
<th>Requirement Type</th>
<th>All</th>
<th>Draft</th>
<th>Pending</th>
<th>Rejected</th>
<th>Approved</th>
<th>Dangling</th>
<th>Orphan</th>
<th>Traceability</th>
<th>Suspect Upstream</th>
<th>Suspect Downstream</th>
<th>Testing</th>
<th>Completed</th>
<th>Incomplete</th>
</tr>
</thead>
<tbody>
<tr>
<td>Business Requirements</td>
<td>108</td>
<td>107</td>
<td>1</td>
<td>0</td>
<td>0</td>
<td>106</td>
<td>85</td>
<td>0</td>
<td>0</td>
<td></td>
<td>107</td>
<td>0</td>
<td>1</td>
</tr>
</tbody>
</table>

No. of Requirements

- Draft
- Pending
- Rejected
- Dangling
- Orphan
- Suspect Upstream
- Suspect Downstream
- Test Pending
- Test Pass
- Test Fail
- Complete
- Incomplete

Page 1 2

Advanced Filters

BR-1052: Administrator should be able to add a comma separated list of users as Administrators in the Add User

BR-1053: A User should be able to create sub folders within a Folder by clicking on the tab “Create Folder”

BR-1054: A User should be able to create Trace From for any previously created Requirement

BR-1055: A User should be able to create Trace To for any previously created Requirement

BR-1056: A User should be able to Delete any previously created requirements by clicking on Delete. This should

BR-1057: A User should be able to delete any subfolders within a folder if there are no existing Requirements
Release Planning

- A rich dashboard and reporting system helps you plan and track your release progress

Word & Excel

- Very good 2 way integration with Word and Excel
- You can import word documents, identify requirements and regenerate the document on the fly
- Export to Excel, work offline and bring it back in to the system

Shared Requirements

- Also known as Product Family Engineering
- Package, Publish, Import, and Track on common shared / compliance requirements across programs
- [http://youtu.be/DGZyJP5TQ6g](http://youtu.be/DGZyJP5TQ6g)
Summary

www.tracecloud.com

• SaaS (Online & Onsite) Requirements Management solution.
• Focus on collaboration, usability and reporting
• Starting at $30 a month

Contact us at

• support@tracecloud.com
• nathan@tracecloud.com
IIBA Webinar – July 2012

How to Plan Business Analysis Activities with...

Yonix

Online software for Business Analysts, designed by Business Analysts

Jody Bullen
CEO and Founder
NZ BA of the Year 2009
www.linkedin.com/jodybullen
Analysis, not Administration

• Designed by BAs for BAs
• Passionate about Business Analysis
• Trusted by Councils/Government, Banks, Health Boards
Collaborate on all your requirements and documentation in one place.
Business Analysis Planning in 6 steps

1. Create a Business Analysis Plan
2. Add Content
3. Add Requirements
4. Define Terms
5. Publish a Version
6. Invite and Collaborate
1 Create a Business Analysis Plan

Import from MS Word or Excel, create from a template or create your own.

Features you will love

- Template common documents
- Concurrent access
- Automatic versioning and auditing
- Tailor documents for stakeholders

Template adapted from www.aoteastudios.com
2 Add Content

Create **tables**, embed **images**, and use rich **text** formatting to communicate your requirements.

**Features you will love**
- Inline Editing
- Copy and paste images
- Inline Spellchecker
- Image Libraries

**Rich Text Formatting**

**Collaborate on content, files, models and images**

**Project Context**

- **Project Background**
  - The company’s website www.company.com has been operational for over 5 years. Since then, the number of registered users and sales transactions has increased steadily to 1.5 million users and a weighted average of 10,000 sales transactions each month for financial year ending 31/3/2012.
  - Growth in the past two years has been exceptional, but the company’s website is still performing below average against industry and competitor metrics.

- **For example**
  - The two closest competing websites have less than 1 million users, but generate between 25,000 and 35,000 sales transactions at an average price of $42.99.

- The board and executive management team believe there is an opportunity to capitalize on the existing customer base to:
  1. Increase the number of weighted monthly sales transactions.
  2. Increase the value of the average transaction.
  3. Reduce the overall costs per sales transaction.

**Scope of BA Work**

- **Stakeholders**
  - Stakeholder
  - Web Customer
  - Customer Profile
  - Ordering / Purchasing
  - Inventory Management

**Stakeholders**

- **Organizational Enterprise**
  - Affected Organizational Unit
  - Solution Delivery

- **Affected External Stakeholders**

A full list of stakeholders, their roles and responsibilities can be found here.
3 Add Requirements

From your libraries to document sections or create new ones inline.

Create requirements types to match your process and reuse these across your projects.

Features you will love

- Inline editing + versioning
- Single point updates
- Requirements traceability
- Drag and drop requirements
- Requirement hierarchies

Business Needs

- Show in Sections
- Unique Identifiers
- Inline Editing

Constraints

- Risks, Constraints, Assumptions

Rich Text Formatting

Collaborate on all your requirements in one place
Define Terms

Store and reuse terms and definitions to prevent misunderstandings, saving you hours of explanations and headaches.

Features you will love

- Share dictionaries across projects
- Reuse common terms
- Automatic synchronization
- Multiple dictionaries
- Nested references
5 Publish a Version

**Baseline** your Yonix Documents Online or **publish** a version to MS Word.

**Features you will love**
- Microsoft Word output
- Customizable output templates
- Document versioning and baselines
Invite and Collaborate

Invite team members and stakeholders to review, validate, discuss, share their thoughts, and provide feedback on your documents and requirements.

Features you will love

- Inline comments and discussions
- Automatic notifications
- Discussions views

Collaborate on everything!
Yonix makes Requirements Collaboration easier

- Analysis, not Administration
- Build consensus faster
- Better requirements
- Improve business outcomes
- Retain and reuse knowledge

“The stand out features in Yonix are collaborative documents and the output to Word; very professional, very easy to do and very quick.”

Kate Fox - Senior Business Analyst

"Yonix makes the whole process of managing and versioning requirements simpler and more transparent.“

Scottie Henderson - Senior Business Analyst
Want to be a better BA?

Sign-up for your complimentary community license now at...

www.yonix.com/iiba

Thanks!
The common story of Requirements Communication and Collaboration
Requirements Collaboration in action

OBJECTIVES
- Yonix
- Business Case
  - Objective
  - Objective

PLANNING
- Yonix
  - Project Plan
  - Objective
  - Objective
- Yonix
  - High Level Requirements
  - HL Req
  - HL Req

ANALYSIS
- Yonix
  - Requirements Specifications
  - Detail Req
  - Detail Req

DELIVERY
- Yonix
  - Phase One
    - Phase1 Req
    - Phase1 Req
  - Phase Two
    - Phase2 Req
    - Phase2 Req

YONIX LIBRARIES
- TEMPLATES
- REQUIREMENTS
- FILES AND IMAGES
- DICTIONARIES
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 vendor’s name if you want a specific vendor to respond.
- Short, specific questions, please!

IIBA Host
Tom Karasmanis
Contact Information

Register for more webinars on the Professional Development page of our website – under Webinars.

IIBA.org/PD | community.IIBA.org | info@IIBA.org

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