International Institute of Business Analysis

IIBA® Vendor Showcase

POLARION

tracecloud

Yonix

Plan Business Analysis Activities

Task 2.3

July 19, 2012

Changing Change.

Develop the Professional. Develop the Profession.

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

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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.

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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.

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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

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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 vendor's name if you want a specific vendor to respond.
- Short, specific questions, please!

IIBA Host

Tom Karasmanis

POLARION

Gian Giacomo Ermacora

tracecloud

Nathan Reddy

Yonix

Jody Bullen

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Agenda

- Purpose
- Activities
- Challenges
- Considerations

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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

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Plan Business Analysis Activities

Purpose

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

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Plan Business Analysis Activities

Inputs

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

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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

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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

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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

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Plan Business Analysis Activities

Considerations

- Geographic Distribution of Stakehholders
  - Collocated, Dispersed, Outsourced
- Project Type
  - Green Field, COTS, Compliance, Org Change

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Polarion Software®

Polarion® ALM™

”Plan Business Analysis Activities”

•Author: Polarion Software

•E-mail: info@polarion.com

•Web: http://www.polarion.com

PBAA - In a Nutshell

✓ Understand the **goals**	**WHAT**
✓ Define what needs to be done	**HOW**
✓ Define **who** should do the job	**WHO**
✓ Estimate and *plan the activities*	**WHEN, HOW LONG**

MEETINGS, CHECKLISTS, COLLABORATION, ESTIMATION, STATUS, TRACKING

An Example

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 helpfull things

Checklists

- 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

Polarion

- **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

Checklists

Templates

Basic Test Documentation Templates

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

Document	Description	Actions
Test Plan	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.	Create new
Test Specification	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.	Create new

Software Engineering Documents

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

Document	Description	Actions
Software Project Management Plan	Description of the software approach and associated milestones	Create new
Software Requirements Specification	Description of the expected software features, constraints, interfaces and other attributes.	Create new
Software Design Description	Description of how the software will meet the requirements. Also describes the rationale for design decisions taken.	Create new
Software Test Plan	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	Create new
Software Test Design Specification	A document specifying the details of the test approach for a software feature or combination of software features and identifying the associated tests.	Create new
Software Test Case Specifications	A document specifying inputs, predicted results, and a set of execution conditions for a test item.	Create new

Checklists / Deliverables

Documents

- Polarion POP (Polarion Popular Extensions) - download helpful extensions, templates and add-ons related to the Polarion platform.
- Online Tutorials - What these videos to learn Polarion even faster
- ROI Calculator

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

1. Example: Customize requirements to our process
1. 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.

Closed

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.

In Progress

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

1 - Example: Have a common platform which contains all requirements, so that we alwa...

Properties

*Severity: Should have
Status: Draft
Assignee(s): -- automatic --
Due Date:
Initial Estimate:
Author: Timothy Ströbele

Links

Paste Link | Edit Links

Activities

Tree / Table View

Outline Numb	Title	Status	Assignee(s)	Time Point	Created	Remaining Es	Initial Estin
MP-270	Polarion POC				2011-02-08 20:18		
1	Overview				2011-02-08 20:27		
2	Please Do Not Forget				2011-05-14 22:49		
3	POC Team And Place				2011-05-14 21:52		
4	References / Links				2011-02-08 20:38		
5	POC Goals				2011-02-08 20:18		
6	Scope And Activities				2011-02-08 20:24		
6-1	Send Polarion Installation Checklist to customer				2012-02-01 23:17		
6-2	Update Polarion POC template with customer data				2012-02-01 23:18		
6-3	Polarion POC Server Installation				2011-08-29 16:10	1/2d	1/2d
6-4	Core Team Training				2011-08-29 16:10	2d	2d
6-5	Process Implementation				2011-08-29 16:44	3 1/2d	3 1/2d

Online Authoring with "LiveDocs"

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.

Meetings / Communication

- **Planning** and the **identification** of activities will typically involve:
  - ✓ **Meetings** ➠ Meeting minutes
  - ✓ **Action items** ➠ activites, 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 ?“

Polarion

- **Track** and **share** meeting minutes as you would do in MS Office:
  - ✓ Shared, availbale 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

• Communication

Estimate and Plan

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

- Typical Problems are:
  - ✓ Deliverables are in documens (Office) *activites* are part of plans (tracking tool, Project Managment tool);
  - ✓ Did we plan everything?
  - ✓ Difficult to *collborate* as task assignment and deliverables are not in same container.

Polarion

- **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

2 Business Requirements 2012-02-03 13:

Score Board

Planned Requirements for Version 1.0	27
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)

WBS

Iteration Planning

Expand Tools

Created: 2010-05-21 15:09, Updated: 2012-05-29 11:32

Info: Please read SprintPlanning wiki page to understand how to plan your sprint

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

Release Backlog: Releases.Version1_0

Total of 9(#) items, 6(#) not started, 0(#) in progress, 2(#) waiting for QA, 0(#) done. Items assigned to current user "admin" are **highlighted**.

To do	In progress	Done	Verified
EL-16 - Failed: com.polarion.demo.LoginTest.testLogin (#)			
EL-109 - Search for a book by advanced properties (4d) (#)			
		~~EL-89~~ (3d)	~~EL-56~~ ~~EL-57~~
EL-122 - User likes to search also by any content - so full-text search is needed. (4d) (#)			
			~~EL-48~~ (2h) ~~EL-49~~ (2h) ~~EL-47~~ (2h)
EL-131 - EBook - supported readers (3d) (#)			
EL-80 (3h) EL-81 (8h)			
~~EL-132~~ - Advanced searching should provide an easy way to construct complex search querie... (10d) (#)			
			~~EL-59~~ ~~EL-58~~
EL-136 - Configure contact information. (10d) (#)			
		~~EL-76~~	~~EL-50~~ ~~EL-51~~ (2d) ~~EL-53~~ (2 1/2d) ~~EL-52~~ (2d)

- Sprint progress?: 371 / 440
- Team capacity: 55d

Time Tracking

type:task | Unresolved | Project | 3 found

Month | 2012 July | Show only: Work Items with Work Records | My Work Records

Save | Revert | Refresh | New Work Record Info | Update Time Spent And Remaining Estimate

	Sun 1.7.	Mon 2.7.	Tue 3.7.	Wed 4.7.	Thu 5.7.	Fri 6.7.	Sat 7.7.	Sun 8.7.	Mon 9.7.	Tue 10.7.	Wed 11.7.	Thu 12.7.	Fri 13.7.	Sat 14.7.	Sun 15.7.	Mon 16.7.	Tue 17.7.	Wed 18.7.	Total
EL-322 - Review if we have some departments within our company whicl		2h																	2h
EL-321 - break down business goals		4h	2h																4h
EL-299 - Capture High Level Deliverables																			-
Total	-	6h	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	-	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 work flow 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

- Requirement Types
- Attributes
- Folder structure
- Roles
- Permissions
- Traceability Rules
- Change Impact Analysis
- Change Management
- Approval Work Flow
- Tracking Change Acceptance

Pre Planning

Flexibility in mapping process to tool

Pre Planning

Flexibility in defining Roles and Permissions (Change Control)

Role Accessibility Req Generators

Edit Role Privileges | Add Users | Edit Users | Delete Role

Edit Permissions for Users in Role

Folder Path	Create Requirement	Read Requirement	Update Requirement	Delete Requirement	Trace Requirement	Approve Requirement	Updatable Attributes (-)
Business Requirement	☐	☑	☐	☐	☐	☐	Attributes All None X collateral Customer Deliverability Impact to customer Severity
Business Requirement/Abhinav Sandbox	☐	☑	☐	☐	☐	☐	Attributes All None X collateral Customer Deliverability Impact to customer Severity
Business Requirement/Administration Requirements	☐	☑	☐	☐	☐	☐	Attributes All None X collateral Customer Deliverability Impact to customer Severity

Pre Planning

Build your requirements, collaborate, collect additional information…

Business Requirement/Demo to Amdocs | Return to List Folder Contents | Folder Actions

Business Requirement : BR-1052 Version (V-1) | Menu | 74 % Completed | Test : Fail

CIA 0 Submit For Approval

Name	Administrator should be able add a comma separated list of users as Administrators in the Add User
Approvers	(P)araneet@digite.com, (P)dulip@tracecloud.com, (P)gisontherun@gmail.com, (P)Jonathan.Walker@disa.mil, (P)meravl@amdocs.com, (A)nathan@tracecloud.com, (P)qa_1@tracecloud.com, (P)qa_2@tracecloud.com, (P)sami@tracecloud.com, (P)shambhaviroy@gmail.com, (P)sreenatht1@yahoo.com
Approval Status	In Approval WorkFlow
Priority	Medium
Owner	nathan@tracecloud.com
Description	Administrator should be able add a comma separated list of users as Administrators in the Add Users page- good ideafsdfsftetwet rerewrew --Trace From :(s)FR-16.1,(s)FR-87 --Trace To :REL-2,(s)REL-3

Traceability

Trace To (eg: BR-1,BR-2)

Trace From (eg: BR-1,BR-2)

Create Traces

Traces To	Traces From
REL-3 : User Dashboard	
REL-5 : Bulk Edit	
BR-1052	
	FR-288 : A should be able to see Folder metrics by clicking...

Attributes

collateral	
Customer	Cisco systems
Deliverability	Desirable
Impact to customer	yes
Severity	3
Type	Bug
test	
Agile Sprint	Jan 2011 Sprint
Agile Task Weight	32
Agile Task Status	In Progress
Agile Effort Remaining (hrs)	8
Agile Total Effort (hrs)	
Amdocs_Work_Estimate	

Update Attributes

Pre Planning

Traceability (Link dependent requirements to each other)

Trace Matrix

Trace From: Functional Requirements — Reqs per page 20 — Filter criteria

Trace To: Business Requirement — Reqs per page 20 — Filter criteria — Go

Next pages (From) : 1 | 2

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

To Reqs → / From Reqs ↓	BR-625 : 2. Formal, defined steps to facilitate the implementation of the audit and this is required	BR-625.1 : 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-629 : 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-288 : A should be able to see Folder metrics by clicking on Folder Metrics button on the right and then								
FR-289 : In the Approval Workflow section of Folder Metrics, we should have a pie chart showing Approved Re			Action					
FR-290 : In the Approval Workflow section of Folder Metrics, we should have a pie chart showing Approved Re								

FR-289 : In the Approval Workflow section of Folder Metrics, we should have a pie chart showing Approved Re => BR-627 : The control system shall not generate audit records, at a minimum, for the following events whether or

Pre Planning

Traceability (Build Trace Tree reports to see dependencies)

Trace Tree Report

Show Filter

No Of Reqs : 515 Page : 1 | 2 | 3 | 4 | 5 | 6

	Trace Tree	Requirement (Tag : Version : Name)	Testing Status
48%	REL-3	REL-3 : Ver-1 : User Dashboard	Fail
33%	BR-12	BR-12 : Ver-6 : Administrator should be able add a comma separated list of users as Administrators in the Add User	Pending
0%	FR-15	FR-15 : Ver-1 : Administrator should be able to create a Project Core Info page for any project.	Pending
0%	TC-17	TC-17 : Ver-1 : Administrator should be able remove any user from the administrator role in the Edit Users page	Pending
0%	TR-33	TR-33 : Ver-1 : Administrator should be able to Create a new requirement type	Pending
0%	TC-372	TC-372 : Ver-1 : Administrator should be able remove any user from the administrator role in the Edit Users page	Pending
0%	TR-33	TR-33 : Ver-1 : Administrator should be able to Create a new requirement type	Pending

There is a suspect upstream trace

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

Agile Scrum Workflow

Select a Sprint: Jan 2011 Sprint (nathan@tracecloud.com) | Create New Sprint

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Sprint Information

Sprint Name *: Jan 2011 Sprint

Sprint Description *: Jan 2011 Sprint

Scrum Master *: nathan@tracecloud.com

Sprint Start Date *: 01/01/2011 (MM/DD/YYYY)

Sprint End Date *: 01/31/0211 (MM/DD/YYYY)

Update Sprint | Delete Sprint

Planning

Identify tasks for this iteration

Agile Scrum Workflow

Select a Sprint: Jan 2011 Sprint (nathan@tracecloud.com) — Create New Sprint

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Backlog

Requirement Type: BR : Business Requirement

Backlog Requirements in Folder: Business Requirement/Bulk Edit

Backlog Requirements are defined as Requirements that are not complete and are not assigned to an Agile Sprint.

Action	Requirement	Owner	Task Weight	Effort Remaining (hrs)	Percent Complete	Priority	Approval Status	Testing Status
Add to Sprint	BR-723 : A smart grid includes an intelligent monitoring system that keeps track of all electricity flowing	nathan@tracecloud.com	0	0	0 %	Medium	Draft	Pending
Add to Sprint	BR-724 : When power is least expensive a smart grid could turn on selected home appliances such as washing	nathan@tracecloud.com	0	0	0 %	Medium	Draft	Pending
Add to Sprint	BR-725 : Similar proposals include smart electric grid, smart power grid, intelligent grid (or intelligrid)	nathan@tracecloud.com	0	0	0 %	Medium	Draft	Pending
Add to Sprint	BR-726 : Using real-time information from embedded sensors and automated controls to anticipate, detect, an	nathan@tracecloud.com	0	0	0 %	Medium	Draft	Pending

Planning

Assign owners and estimate effort

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Daily Scrum

Add Tasks to Sprint (Eg:Br-1,FR-3,BR-33) Add

Move ALL Tasks to Move

Show ONLY tasks owned by All Team Members

Not Started 16 Tasks 6/16 Hours

(0) sami@tracecloud.com 6/16 hrs

Action

BR-922.1 : Ver-4 : This tool should be able to work with excel

This tool should work with excelfdsfdsfdstesttest

(0) sami@tracecloud.com 0/0 hrs

Action

Remove from this sprint
Move to another sprint
Assign To New Owner
Set task weight (importance)
Set Status to In Progress
Set Status to Blocked
Set Status to Completed
Set total effort (hrs)
Set effort remaining (hrs)

In Progress 4 Tasks 0/0 Hours

(21) sami@tracecloud.com 0/0 hrs

Action

BR-919 : Ver-5 : Excel upload / modify attribute does not add to requirement log. We need to fix this. This is a great idea. Lets implement it and see how the users love it. I think it will be a big win - Nathan.

Excel upload / modify attribute does not add to requirement log. We need to fix this asap as its causing user satisfaction issues.

Also can this handle ' single quote ' and "double quotes "

Excel upload / modify attribute does not add to requirement logs and versioning may not work fine

Blocked 2 Tasks 0/0 Hours

(0) nathan@tracecloud.com 0/0 hrs

Action

BR-1689.1 : Ver-1 : Respond to CMC query

Respond to CMC with a video.

(0) nathan@tracecloud.com 0/0 hrs

Action

FR-403 : Ver-1 : Administrator should be able add a comma separated list of users as Administrators in the Add User

Administrator should not be able add a comma separated list of users as Administrators in the Add Users page-good ideafsdfs
rerewrew

Completed 1 Tasks 0/0 Hours

(0) nathan@tracecloud.com

Action

FR-404 : Ver-1 : Administrator should be able add a comma separated list of users for any Role in the Add Users pa

Administrator should be able add a comma separated list of users for any Role in the Add Users page

Planning

Prioritize tasks (taking effort and owners into consideration)

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Daily Scrum

Add Tasks to Sprint (Eg:Br-1,FR-3,BR-33) Add

Move ALL Tasks to Move

Show ONLY tasks owned by All Team Members

Not Started 15 Tasks 6/16 Hours

(13) ami@tracecloud.com 6/16 hrs

Action

BR-922.1 : Ver-4 : This tool should be able to work with excel

This tool should work with excelfdsfdsfdstesttest

(6) nathan@tracecloud.com 0/0 hrs

Action

Remove from this sprint
Move to another sprint

Assign To New Owner

Set task weight (importance)

Set Status to In Progress
Set Status to Blocked
Set Status to Completed

Set total effort (hrs)
Set effort remaining (hrs)

requirements

In Progress 4 Tasks 0/0 Hours

(21) sami@tracecloud.com 0/0 hrs

Action

BR-919 : Ver-5 : Excel upload / modify attribute does not add to requirement log. We need to fix this. This is a great idea. Lets implement it and see how the users love it. I think it will be a big win - Nathan.

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Also can this handle ' single quote ' and "double quotes "

Excel upload / modify attribute does not add to requirement logs and versioning may not work fine

(0) nathan@tracecloud.com 0/0 hrs

Blocked 2 Tasks 0/0 Hours

(0) nathan@tracecloud.com 0/0 hrs

Action

BR-1689.1 : Ver-1 : Respond to CMC query

Respond to CMC with a video.

(0) nathan@tracecloud.com 0/0 hrs

Action

FR-403 : Ver-1 : Administrator should be able add a comma separated list of users as Administrators in the Add User

Administrator should not be able add a comma separated list of users as Administrators in the Add Users page-good ideafsdfs
rerewrew

Completed 1 Tasks 0/0 Hours

(0) nathan@tracecloud.com

Action

FR-404 : Ver-1 : Administrator should be able add a comma separated list of users for any Role in the Add Users pa

Administrator should be able add a comma separated list of users for any Role in the Add Users page

Planning

Track Progress : Not Started → In Progress → Blocked → Completed

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Daily Scrum

Add Tasks to Sprint (Eg:Br-1,FR-3,BR-33) Add

Move ALL Tasks to Move

Show ONLY tasks owned by All Team Members

Not Started 14 Tasks 0/0 Hours

(0) nathan@tracecloud.com 0/0 hrs
Action
BR-946 : Ver-1 : A User should be able to create sub folders within a Folder by clicking on the tab "Create Folder"
A User should be able to create sub folders within a Folder by clicking on the tab "Create Folder"

(0) nathan@tracecloud.com 0/0 hrs
Action
BR-948 : Ver-1 : A User should be able to create Trace To for any previously created Requirement
A User should be able to create Trace

In Progress 1 Tasks 0/0 Hours

(0) cybshan@gmail.com 0/0 hrs
Action
BR-634 : Ver-1 : personnel and assets;
personnel and assets;

Blocked 6 Tasks 0/0 Hours

(0) apraneet@digite.com 0/0 hrs
Action
BR-627 : Ver-4 : The control system shall not generate audit records, at a minimum, for the following events whether or
The control system shall generate audit records, at a minimum, for the following events whether or not the attempts were successful:

(0) apraneet@digite.com 0/0 hrs
Action
BR-630 : Ver-2 : 3. Attempts to change local security policy is permitted
3. Attempts to change local security

Completed 13 Tasks 2/22 Hours

(55) nathan@tracecloud.com
Action
BR-1368 : Ver-1 : demo to digite
demo to digite

(0) jeremy.ackroyd@uk.fujitsu.com
Action
BR-12.1 : Ver-3 : Administrator should be able add a comma separated list of users for any Role in the Add Users pa
Administrator should be able add , a comma separated list of users for any Role in the Add Users page to every one

Planning

Track Progress : Trends at an Iteration level

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Sprint Dashboard

Project Trends

For best performance, please ensure that you have the latest Adobe Flash Player installed.

All | Draft | Pending | Rejected | Approved | Dangling | Orphan | Suspect Upstream | Suspect Downstream | Test Pending | Test Pass | Test Fail | Completed | Incomplete

All Requirements in Project

Agile Sprint Metrics as of '31 January 2012 01:00:09 AM '

		Approval				Traceability				Testing			Completion	
Requirement Type	All	Draft	Pending	Rejected	Approved	Dangling	Orphan	Suspect Upstream	Suspect Downstream	Pending	Pass	Fail	Completed	Incomplete
BR	1	0	1	0	0	1	1	0	0	1	0	0	0	1
FR	5	5	0	0	0	5	0	0	0	5	0	0	1	4

Planning

Next Iteration : Easily move all incomplete tasks / requirements to next iteration

Agile Scrum Workflow

Select a Sprint Feb 2011 Sprint (nathan@tracecloud.com) Create New Sprint

Sprint Info | Backlog | Daily Scrum | Scrum Notes | Dashboard

Daily Scrum

Add Tasks to Sprint (Eg:Br-1,FR-3,BR-33) Add

Move ALL In Progress Tasks to Move

Jan 2011 Sprint (nathan@tracecloud.com)
June 2011 (nathan@tracecloud.com)
Mona Sprint (nathan@tracecloud.com)
TBD Sprint (nathan@tracecloud.com)
Can Tire Sprint 3 (nathan@tracecloud.com)
Jourdan Spring A (nathan@tracecloud.com)
Demo to Tech Mahindra (nathan@tracecloud.com)
Demo Sprint (nathan@tracecloud.com)

Show ONLY tasks owned by

Not Started 15 Tasks 0/0 Hours

(13) sami@tracecloud.com 0/0 hrs

Action

BR-922.1 : Ver-4 : This tool should be able to work with excel
This tool should work with excelfdsfdsfdstesttest

BR-919 : Ver-5 : Excel upload / modify attribute does not add to requirement log. We need to fix this. This is a great idea. Lets implement it and see how the users love it. I think it will be a big win - Nathan.

(6) nathan@tracecloud.com 0/0 hrs

Action

Blocked 2 Tasks 0/0 Hours

(0) nathan@tracecloud.com 0/0 hrs

Action

BR-1689.1 : Ver-1 : Respond to CMC query
Respond to CMC with a video.

(0) nathan@tracecloud.com 0/0 hrs

Action

Completed 1 Tasks 0/0 Hours

(0) nathan@tracecloud.com

Action

FR-404 : Ver-1 : Administrator should be able add a comma separated list of users for any Role in the Add Users pa
Administrator should be able add a comma separated list of users for any Role in the Add Users page

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

Cloud Development

M P R B

Nathan Reddy's Dashboard

		Approval				Traceability				Testing			Completion	
Requirement Type	All	Draft	Pending	Rejected	Approved	Dangling	Orphan	Suspect Upstream	Suspect Downstream	Pending	Pass	Fail	Completed	Incomplete
BR	1084	1042	42	0	0	982	965	5	31	1010	1	73	11	1073
Cisco_TCD_BR	0	0	0	0	0	0	0	0	0	0	0	0	0	0
DEF	68					68	63	1	0	68	0	0	0	68
FR	279	278	1	0	0	275	69	1	0	278	1	0	3	276
GL	73					0	0	0	0	73	0	0	0	73
REL	0					0	0	0	0	0	0	0	0	0
TC	622					612	602	2	1	617	2	3	1	621
TR	234					231	224	2	0	217	6	11	0	234

General Reports

- My Reqs
- My Reqs Changed After mm/dd/yyyy
- My Completed Reqs
- My Incomplete Reqs

Approval Work Flow Reports

- Reqs in Approval Work Flow 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 tire demo
- Demo to Divya
- Demo to Joseph
- demo to Mahesh
- Henk's BRs
- Incomplete Sev 1,2 Bugs & enhancements
- My Business Requirements
- Richards demo
- Auto Pilot Trace Tree

My Private Docs

No Documents Found

My Public Docs

- Cisco Demo Doc
- test
- Demo to Mary Gerush
- demo
- test sam
- dave demo doc
- cisco demo to idc
- artg ajay demo
- test embedded report
- Word formatting
- demo with incorrect jutify
- test

Post Planning – Dashboards

Folder Dashboard

Business Requirement/Demo to Amdocs

Folder Actions

Requirement Type	All	Approval				Traceability				Testing			Completion	
		Draft	Pending	Rejected	Approved	Dangling	Orphan	Suspect Upstream	Suspect Downstream	Pending	Pass	Fail	Completed	Incomplete
Business Requirements	108	107	1	0	0	106	88	0	0	107	0	1	0	108

Page 1 2

Advanced Filters

74% BR-1052 : Administrator should be able add a comma separated list of users as Administrators in the Add User

0% BR-1053 : A User should be able to create sub folders within a Folder by clicking on the tab "Create Folder"

0% BR-1054 : A User should be able to create Trace From for any previously created Requirement

0% BR-1055 : A User should be able to create Trace To for any previously created Requirement

0% BR-1056 : A User should be able to Delete any previously created requirements by clicking on Delete. This sh

0% BR-1057 : A User should be able to delete any subfolders within a folder if there are no existing Requiremen

Post Planning – Wrap Up

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

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

Yonix

Analysis, not Administration

- Designed by BAs for BAs
- Passionate about Business Analysis
- Trusted by Councils/Government, Banks, Health Boards

Business Analysis Plan

Yonix

Risks, Constraints, Assumptions

Stakeholders

Customisable

BA Approach & Deliverables

Project Context

Glossary

Activity Lists

Business Needs

Professional

Collaborate on all your requirements and documentation in one place

Yonix

Business Analysis Planning in 6 steps

Create a Business Analysis Plan

Add Content

Add Requirements

Define Terms

Publish a Version

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 Aotea Studios
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

Project Context

Content | Comments & Discussions | Stakeholders

Project Background

The company's website www.mycompany.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 31/6/2012**. 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 75,000** sales transactions at an average price of $12.99.

The board and executive management team believe there is an opportunity to capitalize on the existing customer base to:

- improve the number of weighted monthly sales transaction,
- increase the value of the average sales transaction, and
- reduce the overall costs per sales transaction.

Active Daily Usage

New Members by Month (000s)

Rich Text Formatting

Project Context

Content | Comments & Discussions | Stakeholders

An overview of the project context is shown below.

http://www.ovitter.com/contents-and-analysis/resource-centers/enterprise-architecture/sample-our-research/eart0810.html

Embed Images

Scope of BA Work

Content | Comments & Discuss

The following areas are in scope for

- Storefront
- Web Customer
- Customer Profile
- Ordering / Purchasing
- Inventory Management

Stakeholders

Content | Comm

Stakeholders

The following diagram indicates how stakeholders an ith the solution, which stakeholders v business process, which are part of the larger organiza nd which are outside the organization.

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

Collaborate on content, files, models and images

3 Add Requirements

From your **libraries** to document sections or create **new ones in-line**.

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

Collaborate on all your requirements in one place

3 Add Requirements

BA Deliverables

Options

Content | Comments & Discussions | Stakeholders

The following are the proposed BA deli
deliverable can be found in the Busines

BA Approach & Deliverables

Requirements

BAD-1	Stakeholder List, Roles, And Responsibility Designation.	Business Analysis Deliverable	Must have	Planned
	Business Analysis Plan.	Business Analysis Deliverable	Must have	Planned
	Busin ysis Communication Plan.	Business Analysis Deliverable	Should have	Planned
	R s Management Plan.	Business Analysis Deliverable	Should have	Planned
	Business Requirements Document.	Business Analysis Deliverable	Must have	Planned
	Requirements Trace Matrix.	Business Analysis Deliverable	Must have	Planned

Tasks & Estimates

Options

Content | Comments & Discussions | Stakeholders

The following table illustrates what BA activities will be undertaken to complete the business analysis work. All estimations are made on a basis of 8 working hours per business day.

Note: Planned activities may be completed in parallel where feasible

The expected start date for the BA work is: **01/07/2012**

Activity Lists

Requirements

Add Requirement

BAD-2	Business Analysis Plan.	Business Analysis Deliverable	Must have	Planned
BAA-2.1	Plan Business Analysis Approach.	Business Analysis Activity		
BAA-2.2	Conduct Stakeholder Analysis.	Business Analysis Activity	Must have	Planned
BAA-2.3	Plan BA Activities.	Business Analysis Activity	Must have	Planned
BAT-1	Identify business analysis deliverables.	Business Analysis Task	Must have	Planned

Dependent Child

Child Requirements for BAD-2

Child Requirements for BAA-2.3

Progress Status

Stakeholders

Version History

0 1 1 3 1 0 2

Dependencies

4 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

Yonix

6 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

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

Yonix

Want to be a better BA?

Sign-up for your complimentary community license now at…

Sign up now and receive five read-only business stakeholder licenses.

No Credit Card, No Risk, No Obligations

www.yonix.com/iiba

Thanks!

Yonix

The common story of Requirements Communication and Collaboration

Requirements Collaboration in action

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

POLARION

Gian Giacomo Ermacora

tracecloud

Nathan Reddy

Yonix

Jody Bullen

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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

Gian Giacomo Ermacora
Polarion
giangiacomo.ermacora@polarion.com

Jody Bullen
YONIX
jody.bullen@yonix.com

Nathan Reddy
tracecloud
nathan@tracecloud.com

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