



Applying Requirements Management to a  
Development Lifecycle Using IBM® Rational®  
Requirements Composer

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IBM Software

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August 9-11, Bangalore | August 11, Delhi



## Agenda

- Introduction
  - Rational Requirements Composer 3.0
  - CLM and Requirements
- Using RRC 3.0 in CLM Practice
  - Lifecycle Development
- What are the Next Steps?



*Requirements Driven Lifecycle Development*

# A New Rational Requirements Composer

## Change the way you think about Requirements...

- **Vision:** Requirements Composer 3.0 takes a large step forward to deliver requirements definition and management for a development lifecycle
- **Next Generation:** Realise the benefits of centralised global development analysing business requirements using the latest Web technologies and best practice paradigms

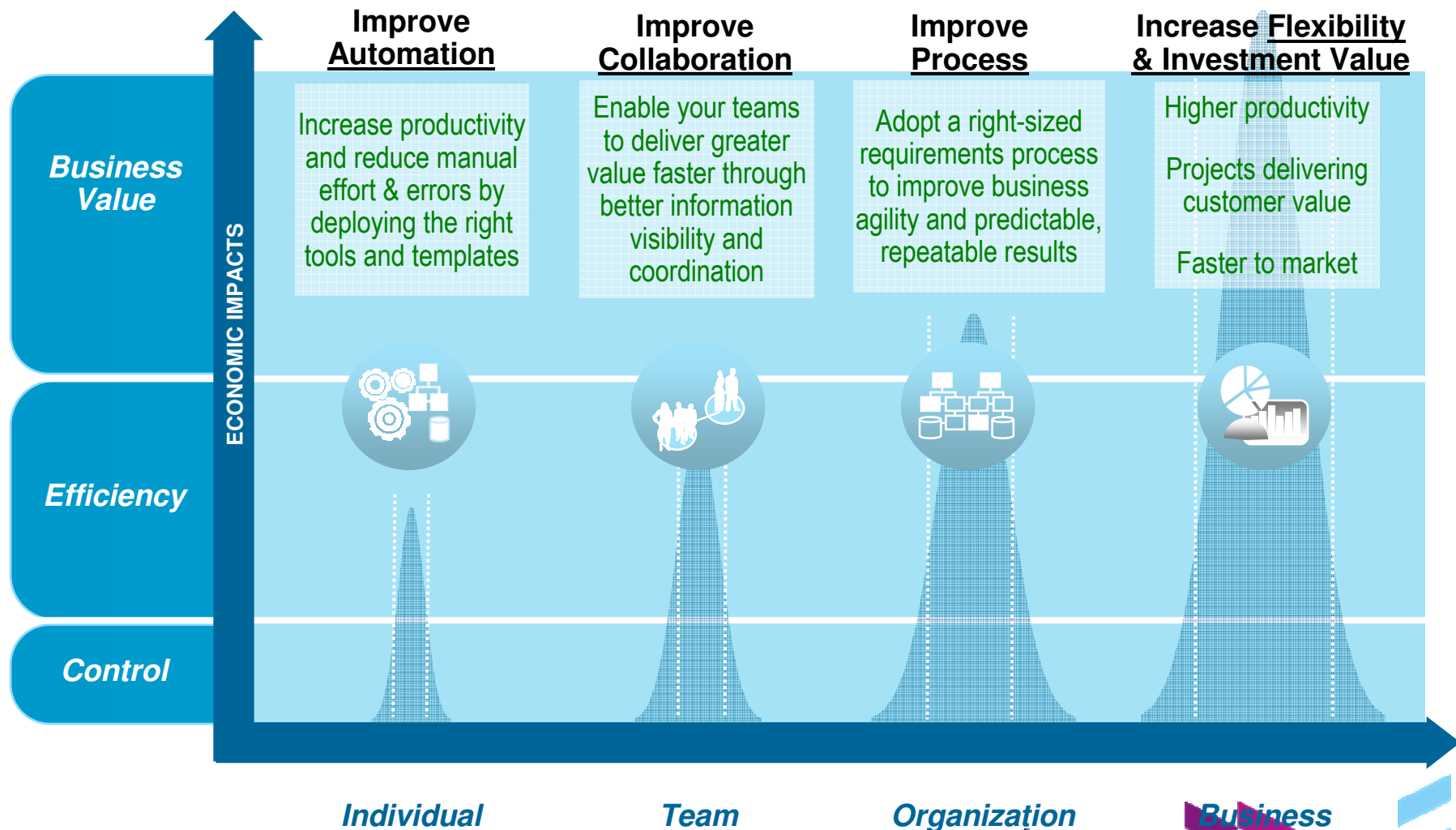


Connecting Development to Requirements

- **Innovation:** Explore the possibilities of visual and textual requirements linked from stakeholder to stakeholder to combine the expertise of development ingenuity

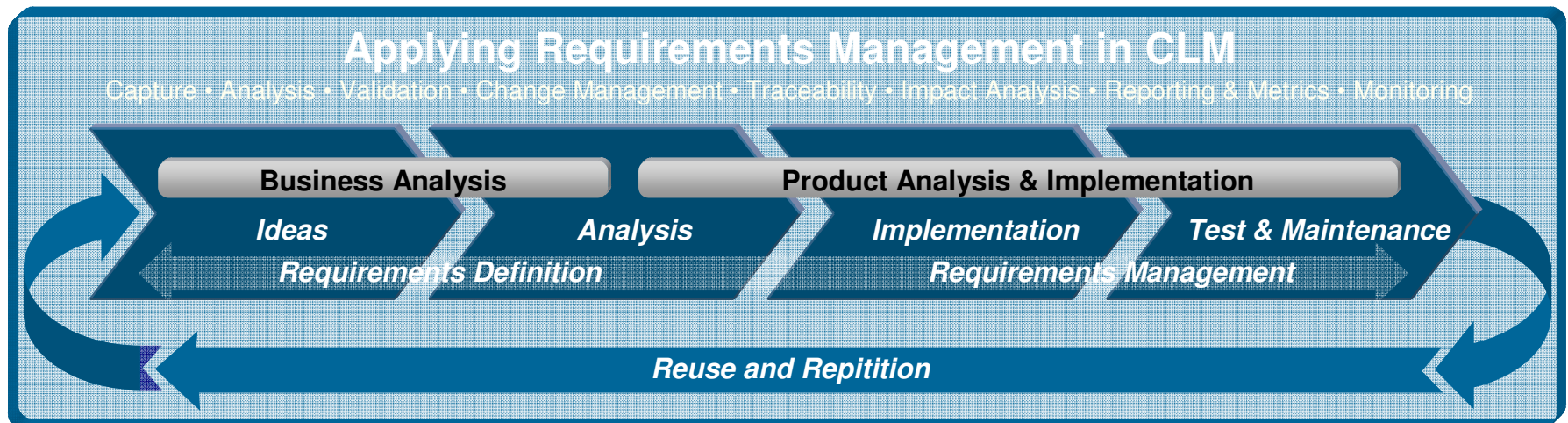
Embrace agile and iterative development methodologies that make businesses more efficient, more cost efficient, and repeatable

# Improve Your ROI With Better Requirements Practices



# What is the Value of Collaborative Lifecycle Management (CLM)?

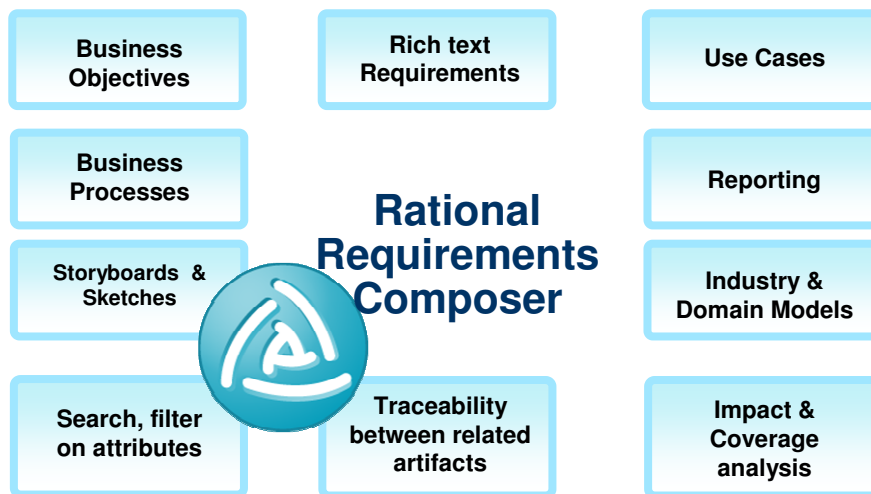
Collaborative lifecycle management coordinates people, processes, and information in an iterative cycle of software and systems delivery activities that:



- ✓ **Meets domain-specific needs** while enabling a real-time flow of information and ideas
- ✓ **Improves collaboration across teams and geographies** by providing consistent access to team process, workflow and artifacts
- ✓ **Helps meet compliance requirements** through asset traceability and approval workflows
- ✓ **Provides the foundation for continuous capability improvement** through flexible, rules-based process enforcement, real-time reporting and integrated best practices
- ✓ **Reduces total cost of ownership** through streamlined and enterprise-ready deployment, security and administration.

# Introducing IBM Rational Requirements Composer v3

*Project driven requirements management for your global team*



**Better requirements... Less rework...  
Better results!**

## Combined Definition and Management

- ✓ Empower teams of all sizes/complexity to capture, define, analyze, manage, report
- ✓ Clear, centralized requirements eliminate redundancy and aid real-time development
- ✓ Develop using agile-at-scale and iterative processes in volatile markets

## Lifecycle Solutions and Collaboration

- ✓ Align business, development and test effort using light-weight process
- ✓ Move beyond file based management with easy Word/Excel migration
- ✓ Engage project stakeholders early and regularly collaborate to improve quality

## Improved Planning and Visibility

- ✓ Realise visibility using traceability across requirements, test, and development
- ✓ Provides up-to-date reporting based on your requirements
- ✓ Manage scope of development project

# IBM Rational Requirements Composer 3.0

## Requirements Management for the Development Lifecycle

### Rational Requirements Composer

#### Definition

- Rich-text documents
- Diagrams: Process, Use Case
- Storyboards, UI sketching & flow
- Project glossaries
- Templates (formal/agile)

#### Visibility

- Customizable dashboards
- Analysis views
- Collections
- Milestone tracking & status

#### Collaboration

- Review & Approval
- Discussions
- Email Notification



#### Management

- Structure, Attributes/Types
- Traceability, Filtering, Tags
- Baselines, Change History
- Reuse
- Reporting Metrics & Doc.

#### Lifecycle

- Central requirements, test, & development repository
- Common administration and role-based user licensing
- Warehouse reporting

#### Planning

- Integrated planning
- Effort estimation
- Progress tracking

## IBM Rational Collaborative Lifecycle Management Solution

*Improve productivity by 4-6% annually with an integrated ALM solution*

- **Optimize your team through support of the 5 ALM Imperatives**
  - Real-time planning
  - Lifecycle traceability
  - In-context collaboration
  - Development Intelligence
  - Continuous Improvement
- **Get up and running quickly**
- **Extend as your needs evolve**
- **Support heterogeneous development across multiple platforms and technologies**





# Using the New Requirements Composer 3.0

CLM in Practice



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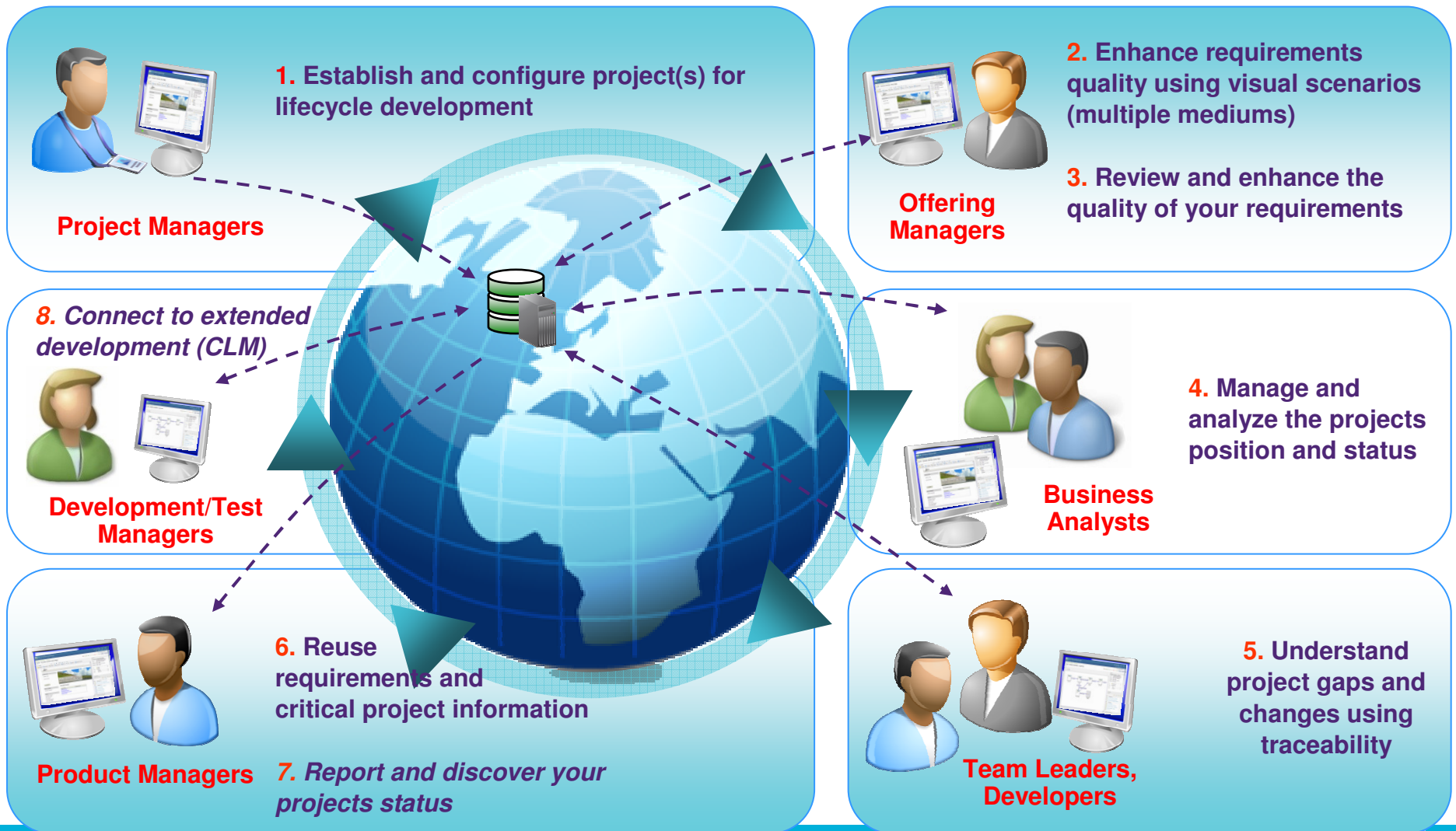
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# Using Rational Requirements Composer 3.0

## Eight steps to requirements practice in a development lifecycle



# Rich Requirement Editor (Documents)

Used by All Project Team Members

## RRC Rich Requirement Editor

### Capability

- Collaborative Rich Document Editor Environment (Text/Tables/Graphics)
- Specific Attributes and Links
- Glossary Terms

### Benefits

- Rich document controls and table support for requirements capture, sharing, and management
- Unify teams around a common Vocabulary

Card: [Donor](#) identifies a specific organization.

The Donor(s) identifies organization to donate Dividend funds.

#### Conversation:

- Registered User accesses **account** information via JKE.com
- Registered user provides secured **login** information in the Ac
- Registered user selects an account in order to donate a per
- Registered user is presented an option to select one or mor
- The transaction is logged in the transaction history.

#### Confirmation:

- The [donation percentage cannot exceed 100%](#).

#### Terms starting with "account"

<b>Account</b>	1. Credit established under a particular name, usually by, against which withdrawals may be made. 2. A record of the fi... (Term)
<b>Account Activity</b>	A summary of activity on an Account. Includes: previous balance, payments, credits, new credit extended, finance charge... (Term)
<b>Account Profile</b>	(Term)
<b>Balance of Account</b>	That amount necessary to equate the total debits and total credits posted to any given Account. (Term)

Showing 4 matches. [Search other projects](#) [Show more information](#)

Find terms starting with:

Find terms containing:

Overview

**121: Donor Chooses Multiple Organizations**

Description:

Project: JKE Banking (Requirements)

Created On: Mar 17, 2011 3:14:18 PM

Created By: Andy - Admin

Modified On: Mar 17, 2011 3:14:48 PM

Modified By: Andy - Admin

---

Type: User Story Elaboration

Format: Text

Priority:

Status:

Role:

---

Comments

Links (13)

Illustrated By (7)

- 63: Accounts Overview (Home Page)
- 77: Dividend Contribution
- 100: Dividend contribution - confirmation
- 35: Dividend contribution - page 1
- 35: Dividend contribution - page 1
- 35: Dividend contribution - page 1
- 60: Dividend Contribution - screen flow
- 101: Finalized Transaction
- Satisfies (2)
- 23: Allocating Dividends to Cause

Collections

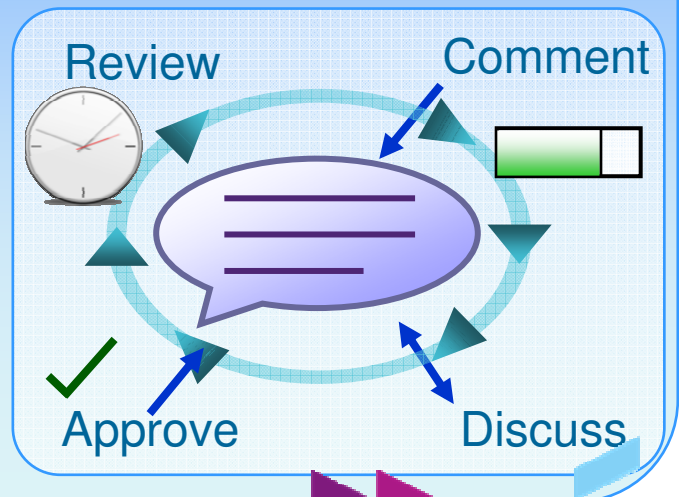
## Developing Requirements, Reviewing and Collaboration The Offering Manager and Product Manager

### 2. Enhance Requirement Quality with Text/Visual Scenarios

- Requirements management teams will capture detailed requirements and diagrams/pictures for critical for development understanding into a consolidated list of project information
- Collect and centralize your requirements in a single repository for management and team collaboration
- Business analysts can start high level requirements through example diagrams, storyboards, or UI mockup do depict how the concept product project will work
- Visually represent requirements through diagrams, use case, story boards to effectively communicate the business development needs

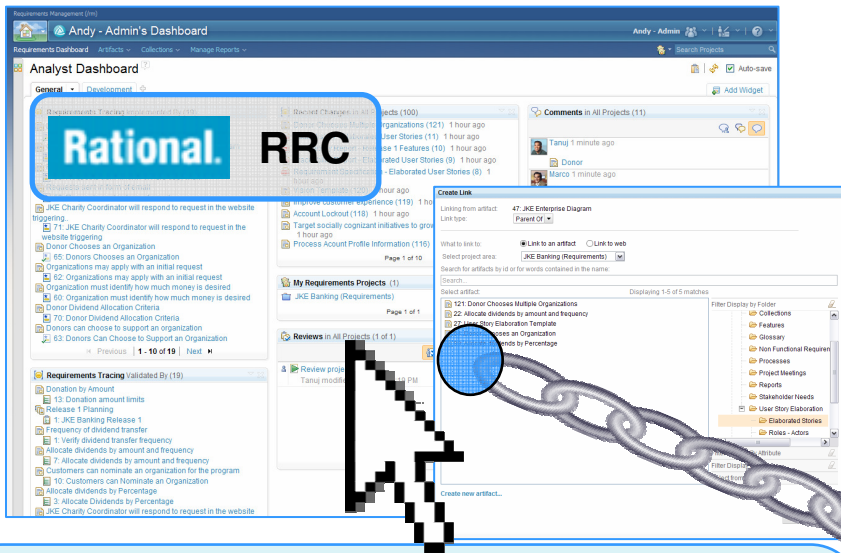
### 3. Review And Enhance The Quality Of Your Requirements

- Requirements teams will review, discuss and collaborate on requirements using email notification for updates
- Achieve better quality requirements and product from collaboration



# Lifecycle Traceability Brings Development Together

## Create dependencies to other lifecycle artifacts

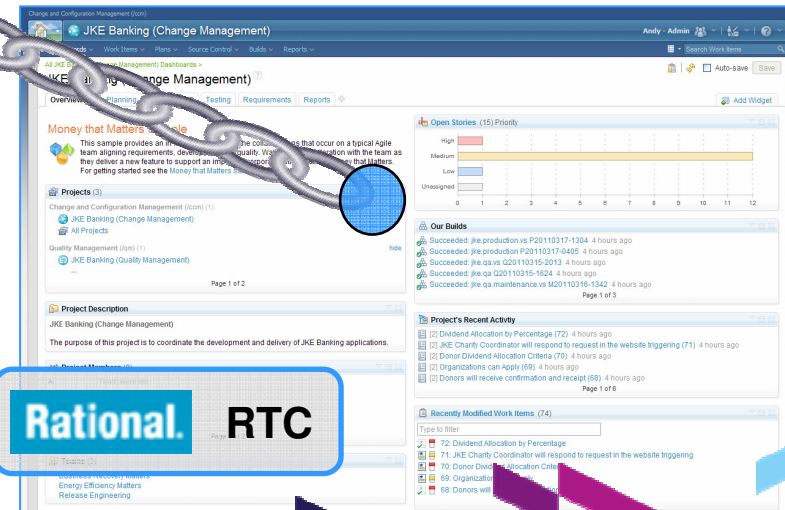


### A Common Approach to Artifact Creation Linking in all CLM Products

- Product A asks Product B what artifacts it can create or link to
- Product B provides the information and interface for creating and linking to its artifacts
- CLM Link types Enforce Relationships

### Requirements Help Drive Development

- Requirement collections are provided to development for development of functional requirements
- Test plans and steps likewise are derived from requirements
- Traceability is necessary to link development disciplines (development, test, reqts., etc.)



# Requirement Traceability and Management

## *The Business Analyst and Development*

### 4. Manage and Analyze the Projects Position and Status

#### Creating Traceability (Relationships)

- Project members will be able to create links/relationships between common requirements artifacts to enable development, show dependence, and prove compliance
- Expose gaps and realize change impact in your development process by applying effective traceability between related project information

#### Management Analysis (Filtering, Sorts, Tagging)

- Business analysts using filters, sorting, Tags, and other data analysis features to manage requirements content and spot change
- Manage business requirements and find gaps, adapt to change, and manage expectations

#### Baselines & Collections

- Project members will collect requirements together or documents and put them into collections or baselines as part of project milestones
- Establish proper review milestones for development for review and comparison



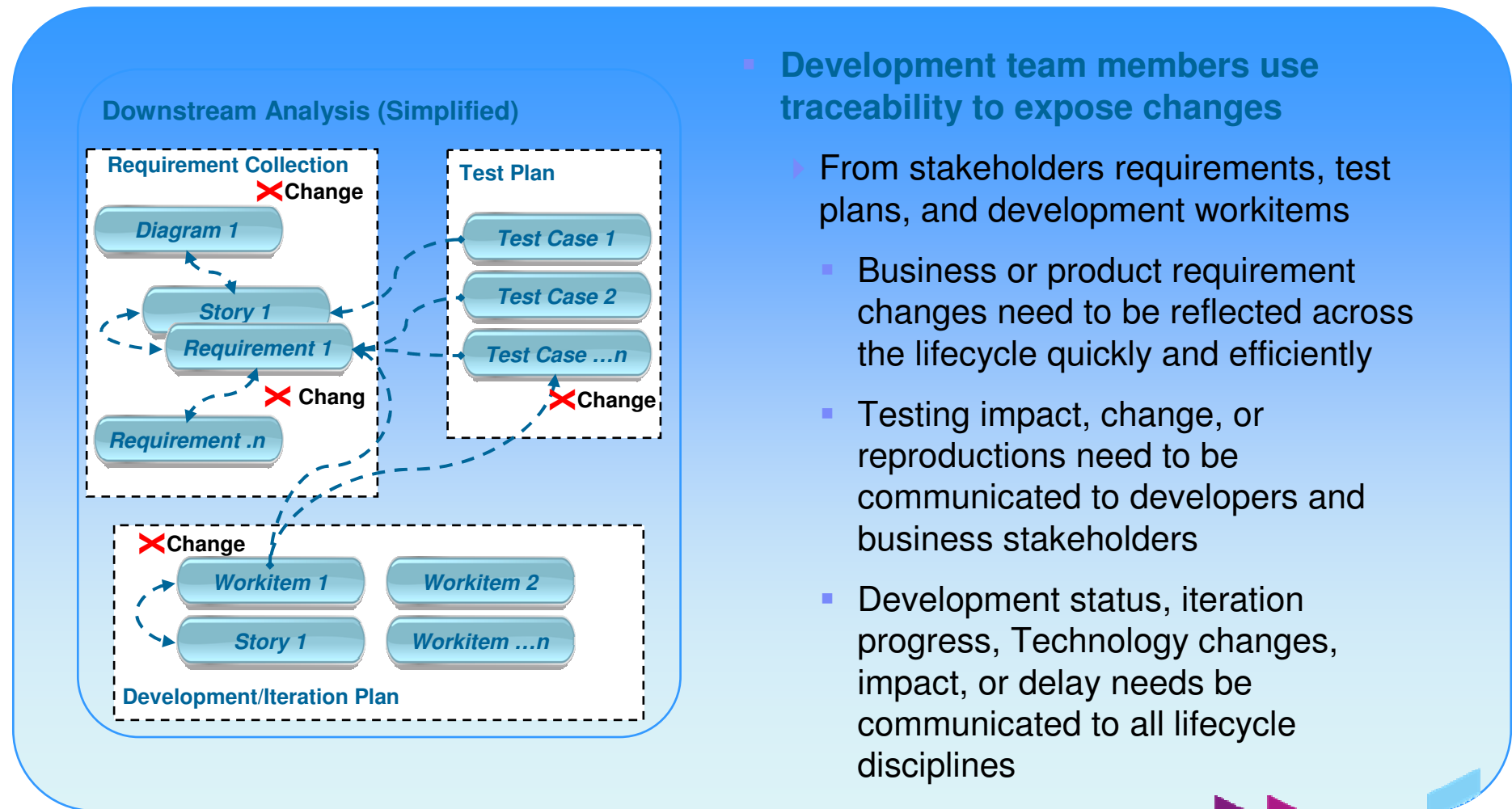
### 5. Understand Project Gaps and Changes Using Traceability

#### Traceability Analysis

- Traceability analysis features will allow team members to see dependency on other requirements, spot gaps in the project, and help manage compliancy
- Raise product quality, lower cost from redundancy and error using traceability

# Analysis and Traceability Across the Lifecycle

*How change can impact across the lifecycle*



- Development team members use traceability to expose changes
  - From stakeholders requirements, test plans, and development workitems
    - Business or product requirement changes need to be reflected across the lifecycle quickly and efficiently
    - Testing impact, change, or reproductions need to be communicated to developers and business stakeholders
    - Development status, iteration progress, Technology changes, impact, or delay needs be communicated to all lifecycle disciplines

# Reusing Requirements and Reporting on Project Status

*The Business Analyst, Product Managers, Development*



## 6. Reuse Requirements and Critical Project Information

### Parallel Requirements Reuse

- Product Managers and Team Leaders can identify key requirements that apply to multiple projects for reuse
- Reusing project information in parallel saves time, keeps common requirements consistent, and reduces the risk of errors between projects

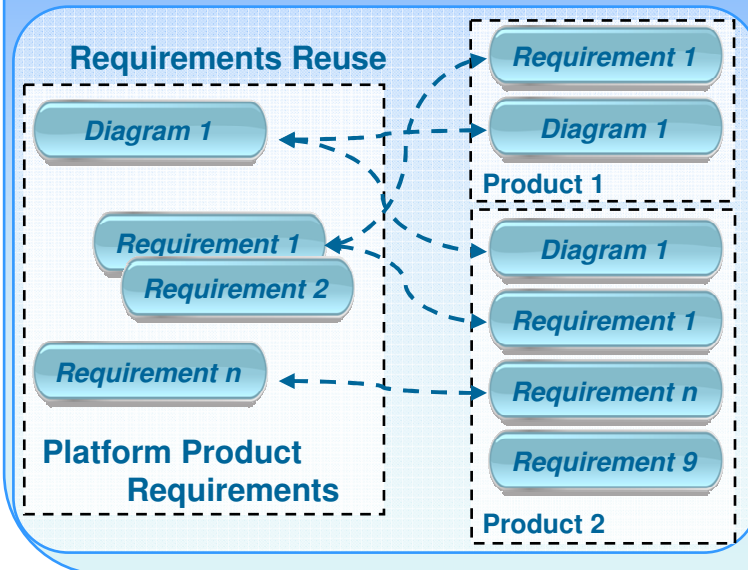
## 7. Report and Discover Your Projects Status

### Import, Export, and migration

- Project members will take existing requirements documents, spreadsheets, and ReqPro data and import them into the RM database
- Migrate requirements information into a centralized RDM tool

### Reporting and Document Generation

- Team leaders will want to deliver reports to senior managers or suppliers/collaborators using document generation facilities
- Provide high quality reports/documents for your requirements driven projects





# Role-based Development Disciplines For Better Project Execution

## Business Analysts, Product Managers, Development, Testers

### 8. Connect to Extended Development (ALM)

- Team members in other project disciplines (testing, development, etc.) will consume, use, and author product information content

#### Business Analysts and Product Management

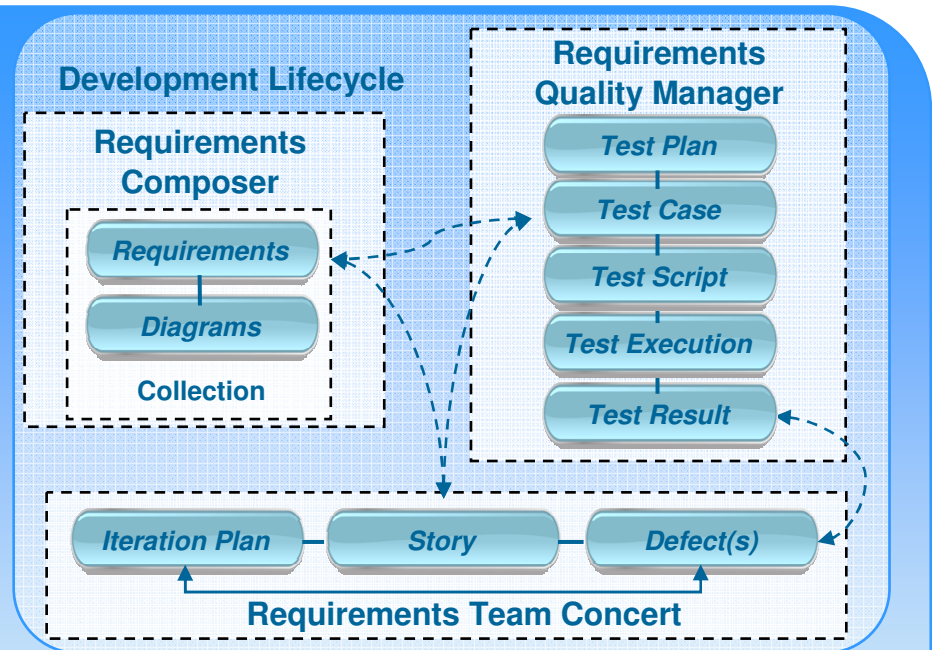
- Analysts define and validate scenarios; analyze and manage requirements for product releases
- Requirements can be traced to test and changes easily discovered to keep information valid

#### Developer, Dev Leads

- Developers see defect in their "To Do" list, and can link to detailed defect information.
- Developers create, prioritize and track work items according to business value

#### Quality Assurance, Testers

- Testers create test plans and report test results against requirements
- Testers captures test execution results and logs defect as a work-item.

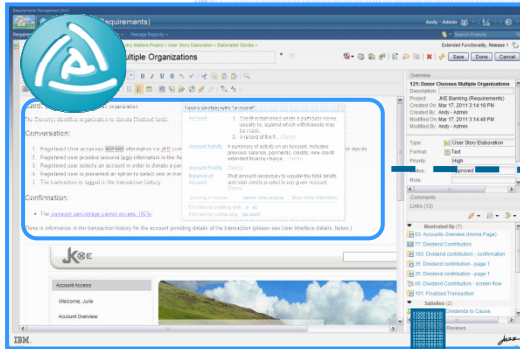


# Working in a Development Lifecycle (CLM Today)

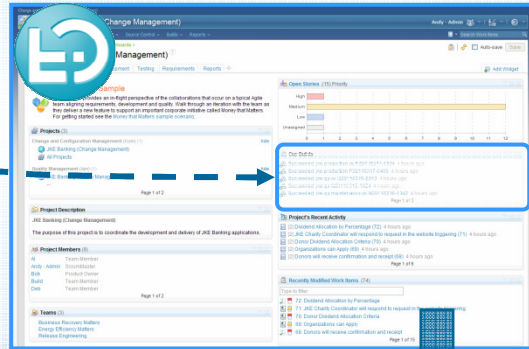
## Requirements driven development across the lifecycle



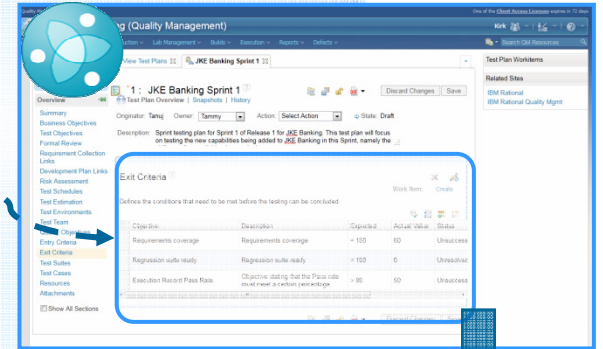
### Rational Requirements Composer 3.0



### Rational Quality Manager 3.0




### Rational Team Concert 3.0



Requirements	Artifact Type	Implemented By	Validated By
8 Dividend allocation by percentage	Feature	75: Dividend Allocation by Percentage	18: Dividend Allocation by Percentage
11 Customers can nominate an organization for the program	Feature	67: Customers can Nominate an Orga...	21: Customers can nominate an organization for the program 10: Customers can Nominate an Organiz...
12 Donor Dividend Allocation Criteria	Feature	73: Donor Dividend Allocation Criteria	16: Don...
23 Frequency of dividend transfer	Feature	58: Frequency of dividend transfer	1: Frequency of dividend transfer

## Single View for End to End Development Needs



# What are the Next Steps? RRC in Practice

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# Improving Requirements Practice in Lifecycle Development

## Summary and Recap

### Requirements Improvement Checklist (8 Steps):

- ✓ **Project Management** - Look at how you are managing your projects from a high level. Align processes, remove redundancy, ensure team members have cross project visibility where needed
- ✓ **Data Quality** - What is the quality/type if of requirements and project data? Use Common templates, similar story and diagram methods, agreement on requirement syntax
- ✓ **Team Collaboration** - Is the development team able to collaborate and work together? Not working in isolation, cross review and apply knowledge to complete project
- ✓ **Project Analysis** - What specific analysis report milestones drive your development process? Know key process questions (e.g. who owns data, cost?, release?)
- ✓ **Traceability** - Can you analyze gaps in your development? Use traceability to see what downstream dependencies exist and what is missing. Use traceability to expose change across the lifecycle
- ✓ **Data Reuse** - Are you able to reuse or are you recreating from scratch every time? Identify a development data model that allows you to reuse project information
- ✓ **Report** - Can you report on key statuses and development steps? Know the level of information coverage or change, or traceability coverage, etc.

- How can you improve what you are doing today?
- Is there a another way to think about how you are developing and using your process?
- Don't force a square peg in a round hole...look for a better way



## Next Steps

Where to go now...

The following links will take you to the next step...  
...for more product information and tool demonstrations

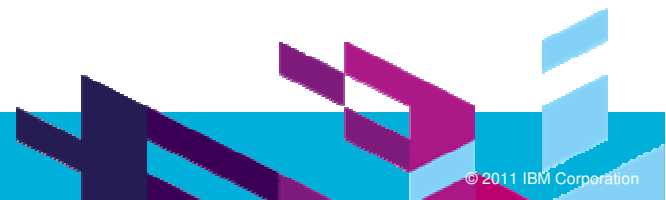


- Requirements Composer on jazz.net
  - <https://jazz.net/projects/rational-requirements-composer/>
- Requirements Composer Release Plan
  - <http://jazz.net/projects/rational-requirements-composer/release-plan/>
- [Rational Requirements Composer Beta Download](#) (Latest Milestone – RC3)
- [Rational Requirements Composer 3.0 M9 \(Beta 2a\)](#) – Includes ReqPro Migration Utility
- [Requirements Composer - A Big Step Forward](#)

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# QUESTIONS

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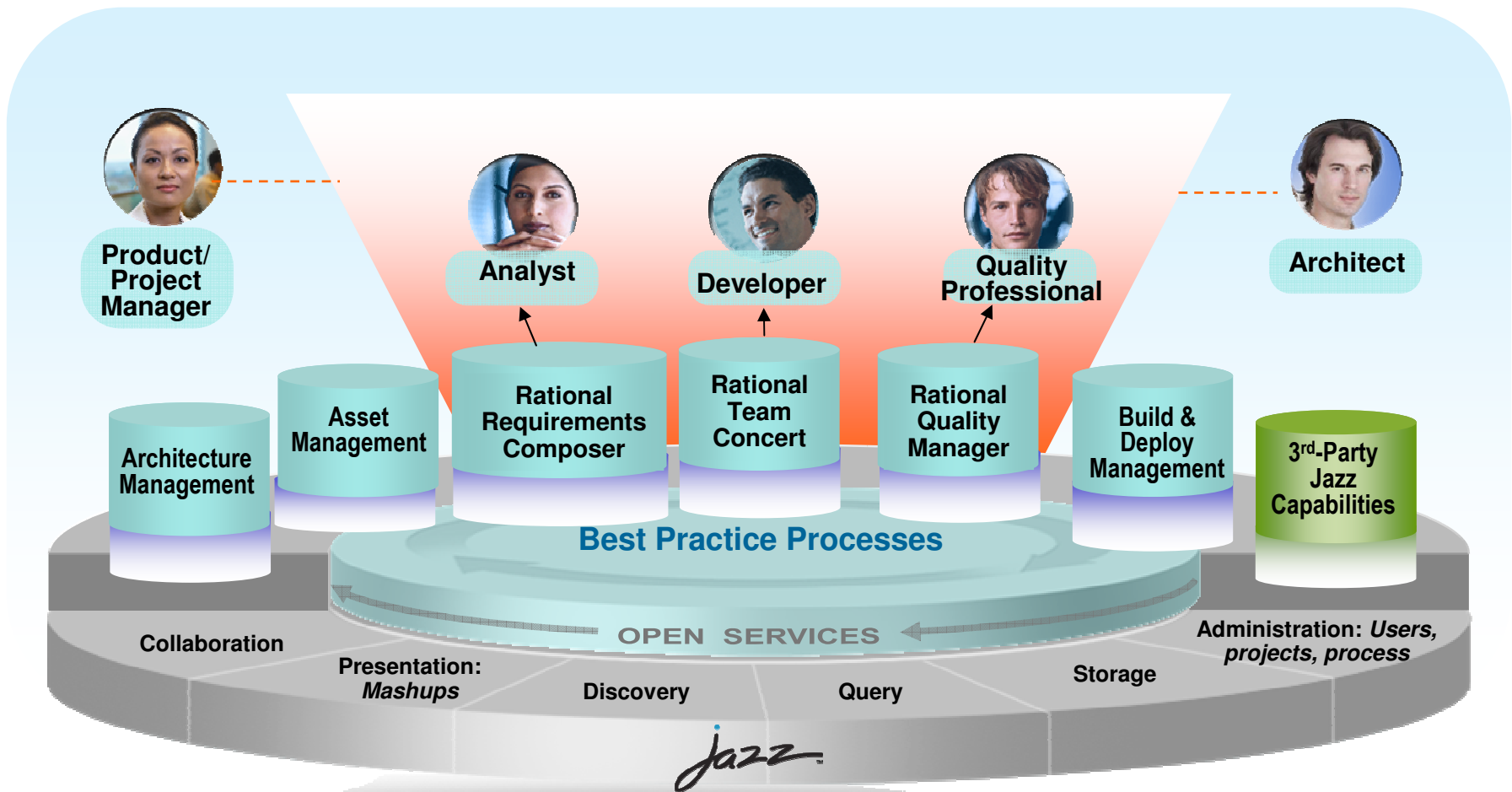


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# Collaborative Application Lifecycle Management

*Extending the value of the IBM Rational Requirements solution*

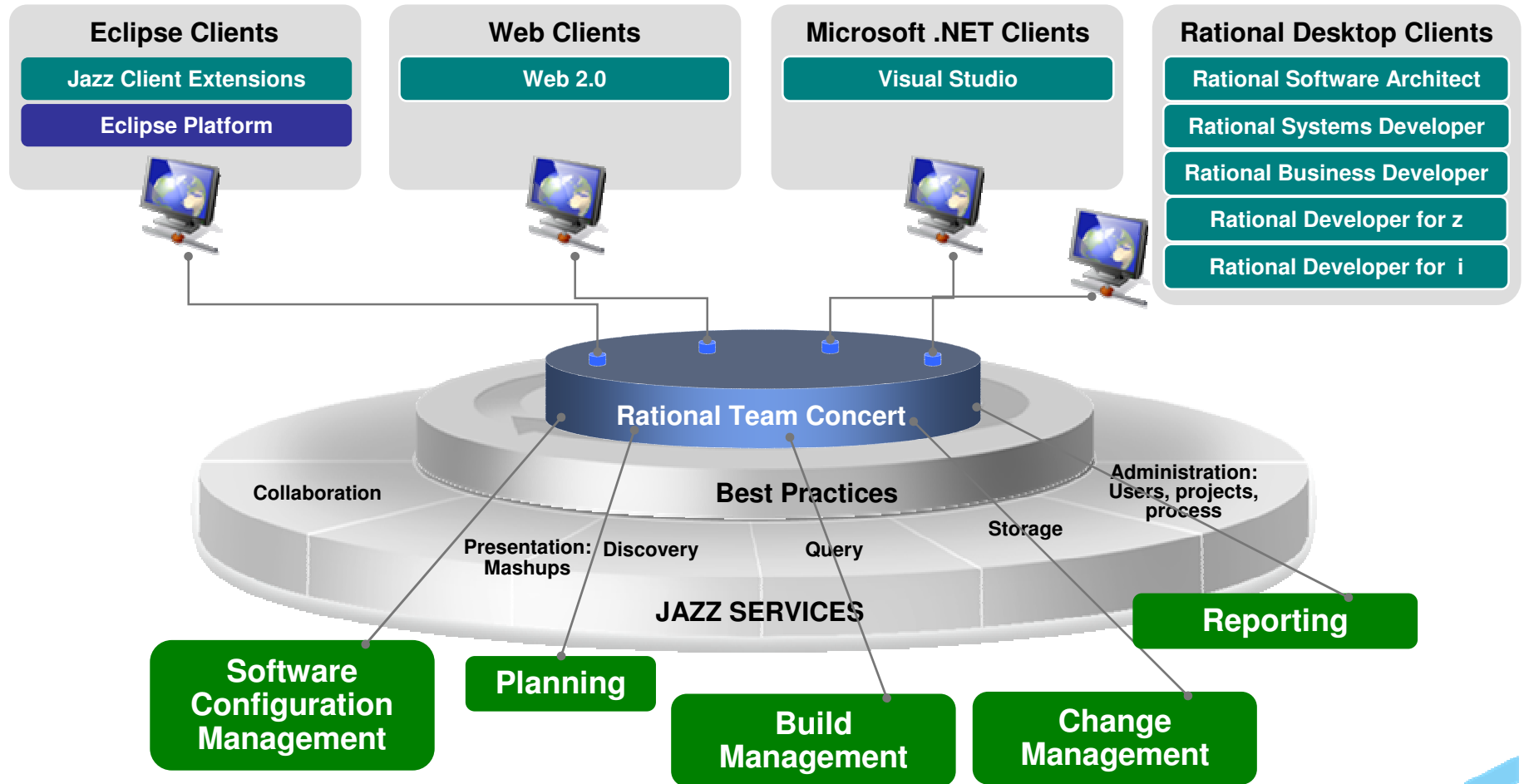


**Robust extensible solution for the entire extended development team**



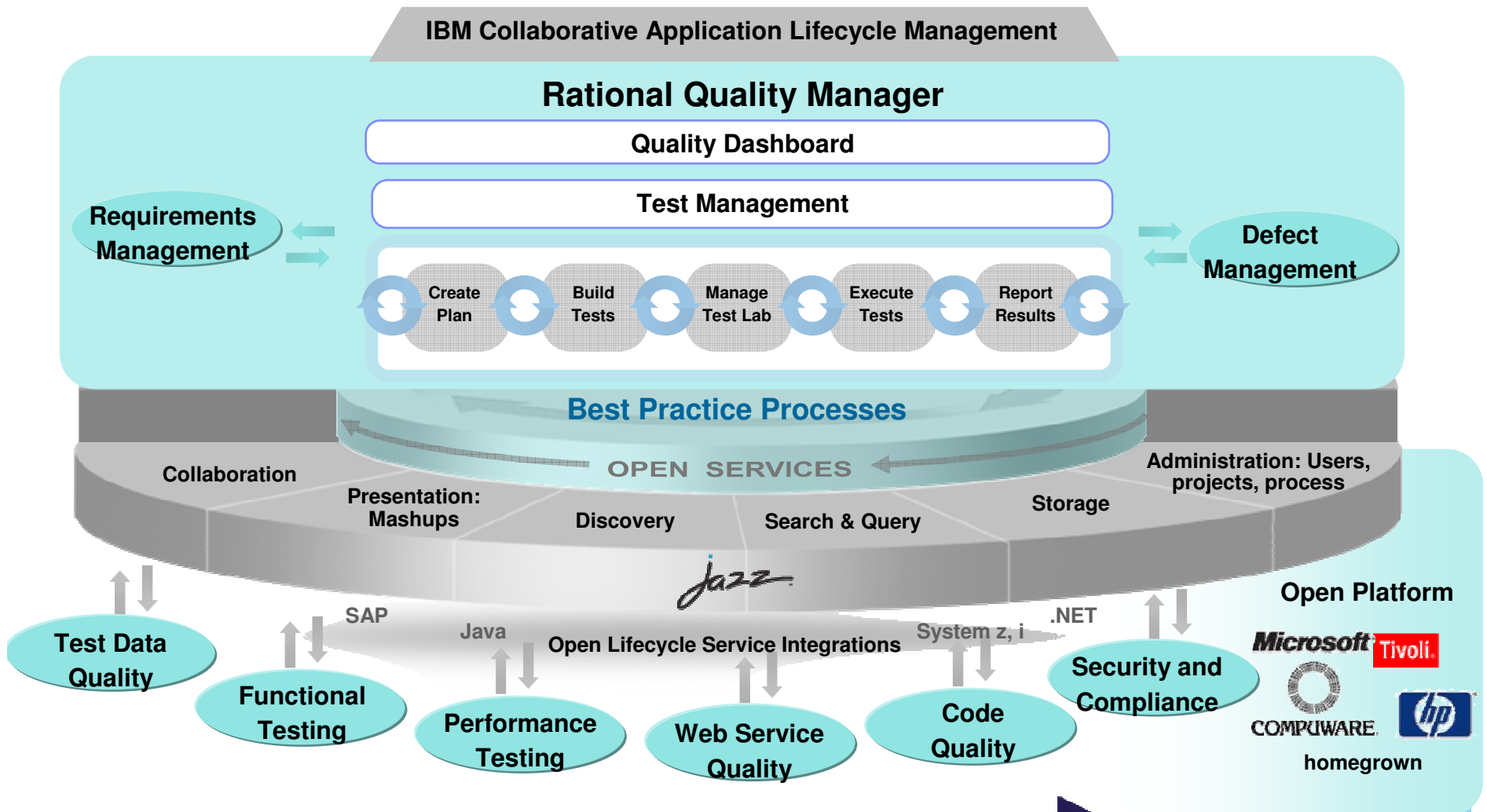
# IBM Rational Team Concert

*Providing core development capabilities supporting a broad range of desktop clients, IDE's, & languages*



# IBM Rational Quality Manager

Centralized test management hub and full lifecycle support across all types of testing and platforms



# What Does Requirements Composer 3.0 Deliver?

*Requirements Management for the Development Lifecycle*

## Definition

- Rich-text Documents
- Process Diagrams
- External Content
- Use Case Diagrams
- Storyboards, UI Sketching & Flow
- Project Glossary

## Planning

- Integrated Planning
- Effort Estimation & progress tracking
- Metrics & Document Reports
- Templates Library (Formal or Agile)

## Collaboration

- Review
- Approval Process
- Discussions
- Email Notification

## Management

- Project Structure
- Lifecycle Traceability
- Filtering & Sorting
- Change History
- Tagging
- Baselines/Snapshots
- Requirement Reuse
- Attributes & Types

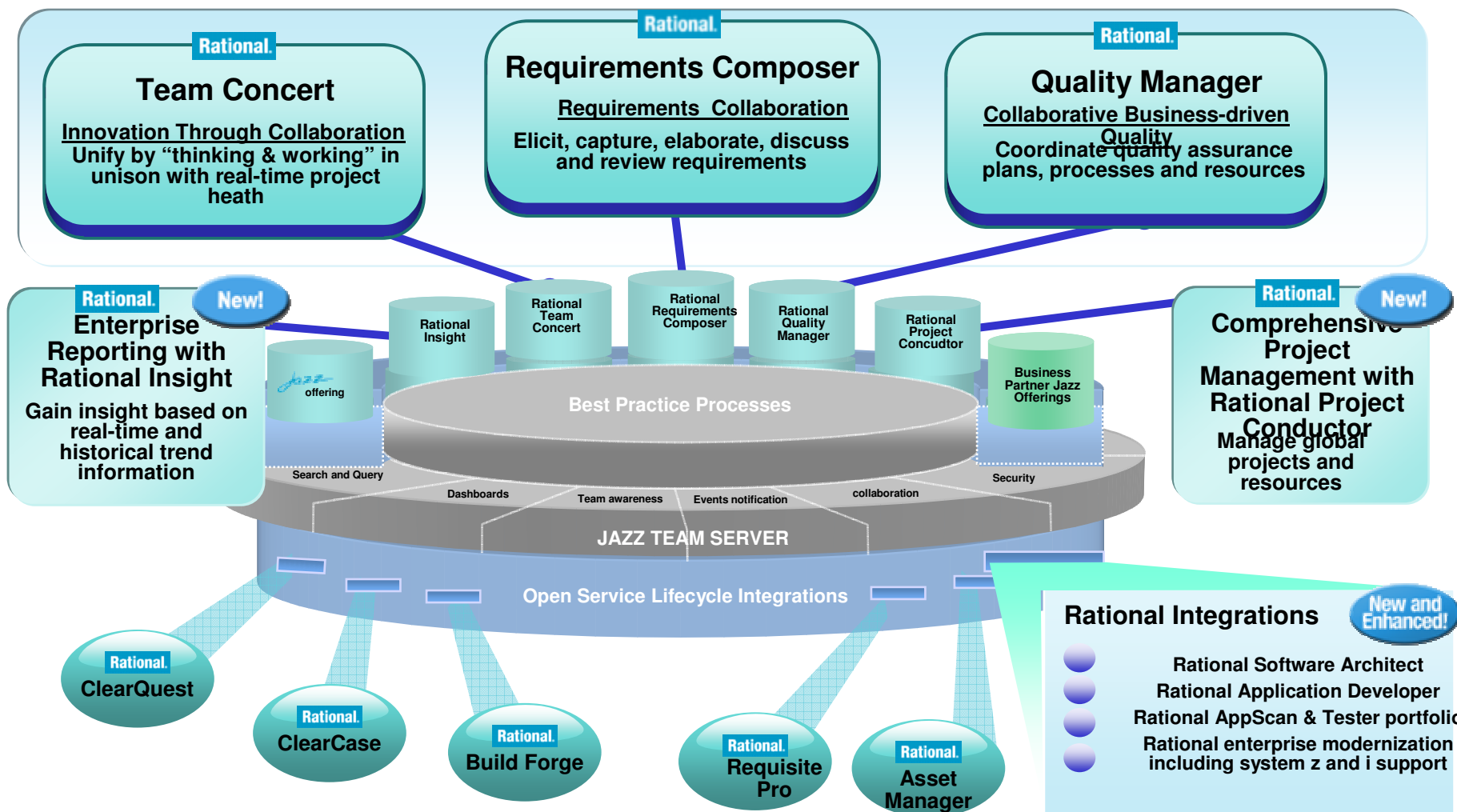
## Lifecycle

- Central repository for requirement, test, & development
- Common User Administration
- Warehouse Reporting
- Role-based License

## Visibility

- Customizable User Dashboards
- Analysis Views
- Collections
- Project milestone Tracking & Status

## Jazz offerings available today from Rational



# RRC Strategic Release Highlights

*What is fundamentally different with RRC now?*

## Product Capability

- ▶ Provide essential requirements management functionality, recognized as primary reason for buying/deploying a requirements tool
- ▶ Significant improvements in accessibility, traceability and down stream analysis , reporting, query and analysis
- ▶ Web only solution for easier deployment and better CLM integration solution

## Pricing and Packaging

- ▶ Remove server licensing to (aligning with CLM)
- ▶ Align with CLM licensing and providing CLM capabilities
- ▶ Trade up to RRC from ReqPro available

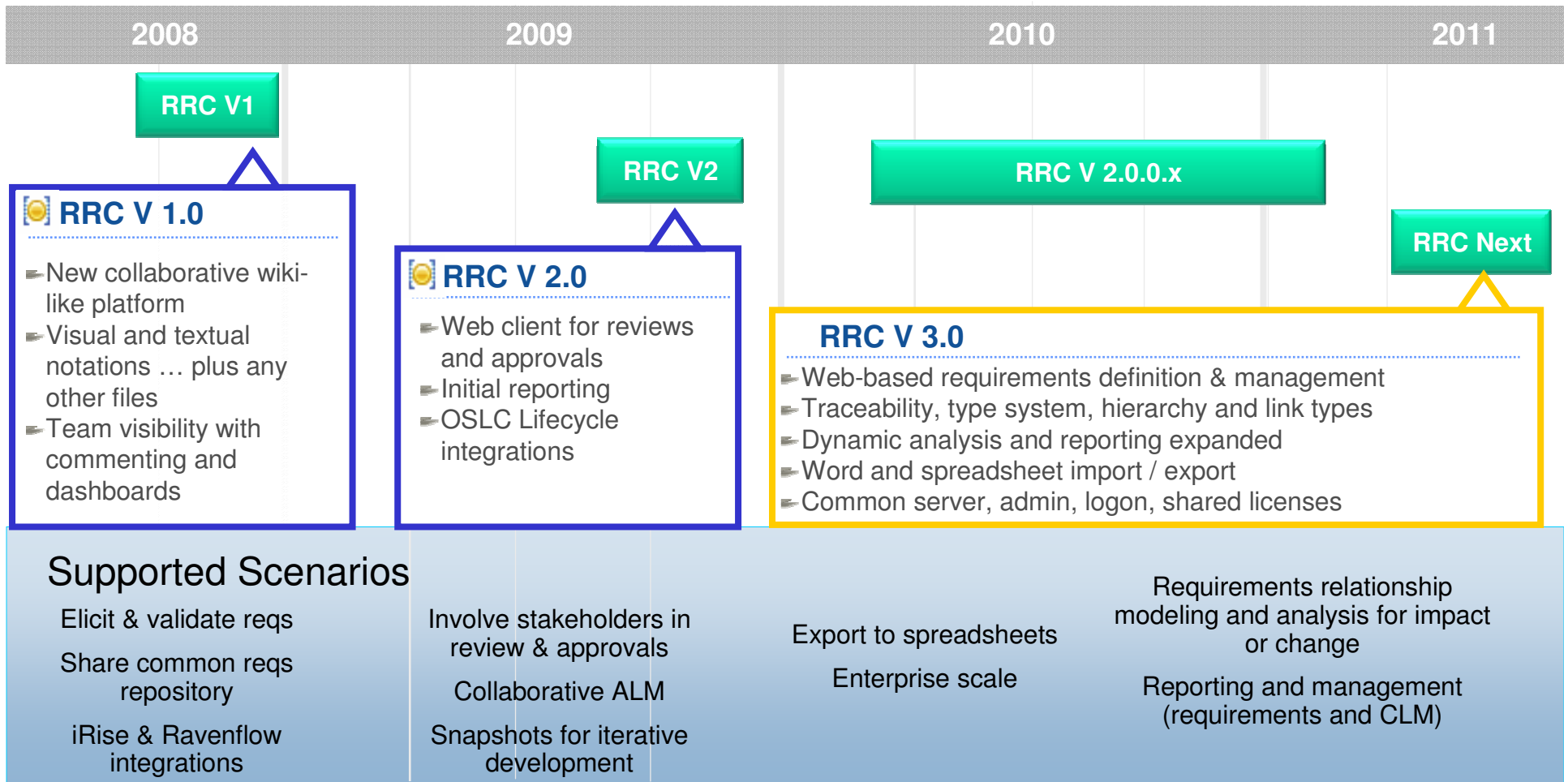
## Positioning

- ▶ RRM/DOORS RP was decided and announced as RRC (RRC would not have any changes)
- ▶ RRC now positioned as a migration model from ReqPro (not integration)
- ▶ RRC now a complete requirements definition and management solution
- ▶ Essential part of the CLM solution



# How has Requirements Composer Evolved?

*Increasing capability and value*



STATUS: ■ Released ■ Planned ■ Conceptual

# CLM Products Dashboards – RRC example



**Recent Changes in All Projects (100)**

- Donor Chooses Multiple Organizations (121) 1 hour ago
- Audit History - Elaborated User Stories (11) 1 hour ago
- Traceability Report - Release 1 Features (10) 1 hour ago
- Traceability Report - Elaborated User Stories (9) 1 hour ago
- Requirement Specification - Elaborated User Stories (8) 1 hour ago
- Vision Template (120) 1 hour ago
- Improve customer experience (119) 1 hour ago
- Account Lockout (118) 1 hour ago
- Target socially cognizant initiatives to grow JKE visibility (117) 1 hour ago
- Process Account Profile Information (116) 1 hour ago

Page 1 of 10

**Comments in All Projects (11)**

- Tanuj 1 minute ago
  - Donor
- Marco 1 minute ago
  - Business Recovery Matters
- Ursula 5 minutes ago
  - Approved in 'Review project terms'
  - Agree with the definition. Just wondering if is there a third investment option?
  - Business Recovery Matters

**1: JKE Banking Release 1**

Name	State
1: JKE Banking Release 1	Draft

**Description**  
Defines testing for the Release 1 of JKE Banking. Significant capabilities being added in Release 1 include the Money that Matters initiative whereby account holders can elect to redirect dividends from their investments to causes needing assistance.

**Details**

Originator:	tammy	Updated:	3/17/11 5:10:25 PM PDT
Calculated Risk:	●●●●○	Project Area:	JKE Banking (Quality Management)
Community Risk:	●●●●○	Team Area:	
Product:	Personal Banking		
Release:	R 1.0		
Test Phase:	User Acceptance Test		

**Test Cases**

- 1: Verify dividend transfer frequency
- 10: Customers can Nominate an Organization
- 11: Donors Choose an Organization
- 12: Organization must provide justification for why funds are needed
- 13: Donation amount limits
- 14: Donors will receive confirmation and receipt
- 15: Organizations can Apply

Show Less

**RRC Dashboard**

**Capability**

- Configurable Dashboard Widgets
- View projects, recent changes, traceability, comments, reviews

**Benefits**

- Easy Navigation to find project data
- Quickly recognise recent change
- Discover traceable requirements
- Take part in ongoing discussions
- Participate in development without the need to request information

# Administration and Configuration



**RRC Administration**

**Capability**

- Manage Attributes and Types
- Configure Link Types and Project Traceability
- Project/Document Templates
- Handle Licenses/ User Roles

**Benefits**

- Configuration for development projects to meet your Specific Projects Needs
- Centralized and Project Wide for Any Development Architecture Model

The screenshot shows the 'Artifact Types' configuration page. The main heading is 'Artifact Types' with a sub-description: 'An artifact type is a definition for a group of objects that serve a similar function in the require functional requirement artifact type, and a use case artifact type. Use this page to define the...'. Below this is a list of artifact types: Business Goals, Business Process Diagram, Business Rule, Feature, Glossary, Iteration Collection, and Non Functional. The 'Business Goals' type is selected, and its configuration details are shown on the right. The 'Name' field contains 'Business Goals', and the 'Artifact Format' is set to 'Text'. There is a checkbox for 'Use artifacts of this type as glossary terms.' which is currently unchecked. Below the configuration is a table for 'Artifact Attributes' with columns for Name, Data Type, and Description. The table contains one row: 'Status' with 'Status List' as the data type.

Name	Data Type	Description
Status	Status List	



# Grid View and In-line Editing

**New Similar Artifacts**

- Apply Tags To 20 Artifacts
- Create Review Containing 20 Artifacts
- Add 20 Artifacts to Collection
- Move 20 Artifacts
- Copy 20 Artifacts
- Export 20 Artifacts
- Edit the attributes for 20 Artifacts
- Edit Artifact
- Generate report from 20 artifacts
- Delete 20 Artifacts
- Add a link to 20 Artifacts

**Requirement Owners and Managers**

**RRC In-line Editor**

**Capability**

- Quick Grid View Rich Editor
- Multiple Value Attributes Edits
- Copy, Delete, Move
- Add To Collection, Review
- Quick Links

**Benefits**

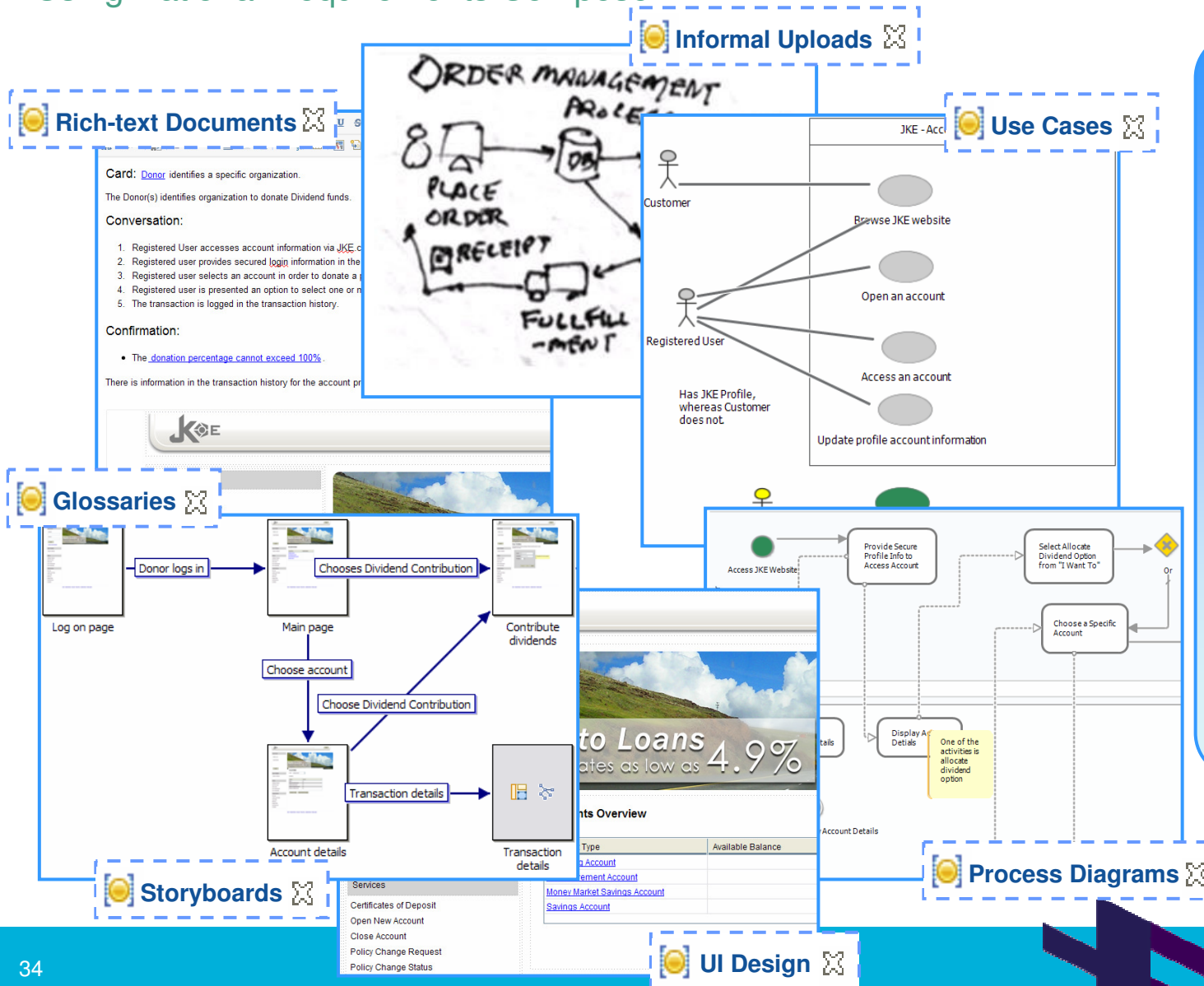
- Quick Editing and Update for Multiple Requirements for Attributes and Traceability

List/	Table	Copy/Paste	Color		
<input type="checkbox"/>	62	Balance of Account	Term	Approved	That amount necessary to equate the total debits and total credits posted to any given Account.
<input type="checkbox"/>	67	Account	Term	Approved	<ol style="list-style-type: none"> <li>1. Credit established under a particular name, usually by, against which withdrawals may be made.</li> <li>2. A record of the financial transactions affecting a particular phase of business. The financial transactions are dated and entered in the account as debits or credits</li> <li>3. As used in the Electronic Fund Transfer Act, account means a demand deposit, savings deposit, or other asset account established primarily for personal, family or household purposes</li> </ol>


# Use Visual Scenarios to Uncover Customer Needs

## Using Rational Requirements Composer



- Defining requirement flows using scenarios to uncover missing critical details
- Text requirements link to diagrams to complete the development picture
- Visualise your development results through a variety of requirements forms
- Traceable elements helps ensure complete coverage thinking

# Process Sketching



**Business Analysts**

## RRC Process Sketching

### Capability

- Process Sketching Editor
- Standard Element Controls
- Traceability To Element

### Benefits

- Visual Representation For Your Process Or Business Diagram For Common Team Understanding
- Capture The Current And Propose A Future State With Business Process Diagrams

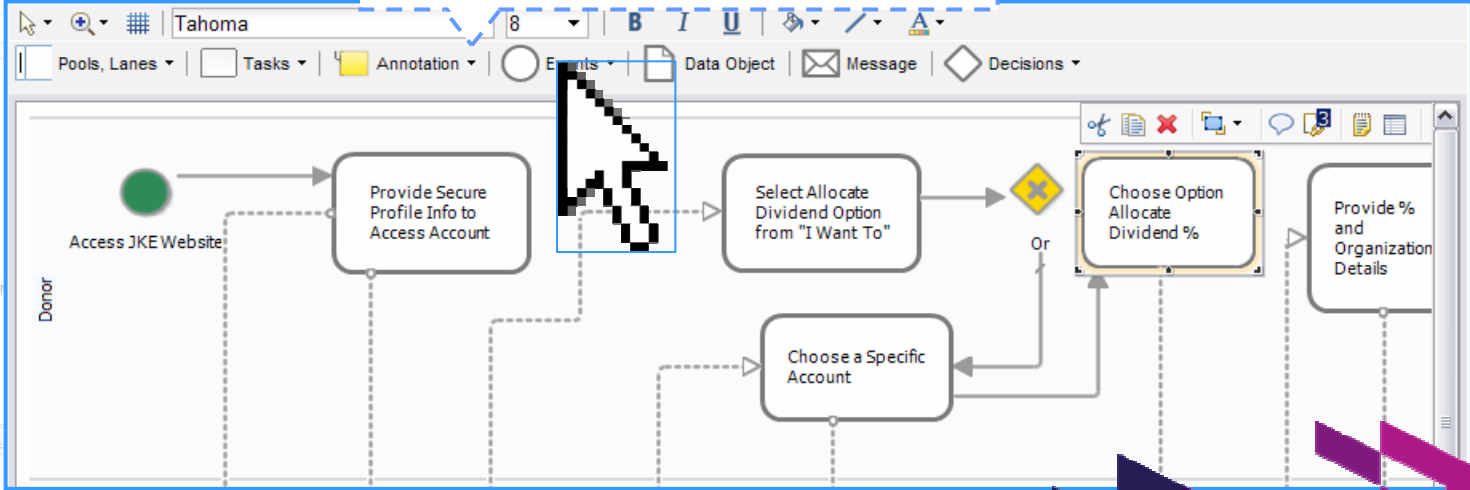
### Links (11)

Illustrated By (5)

- 77: Dividend Contribution
- 100: Dividend contribution - confirmation (/
- 35: Dividend contribution - page 1 (Choose
- 101: Finalized Transaction (Display of Fina
- 83: Log In Page (Provide Secure Profile Inf

Satisfied by (4)

- 99: Allocate dividends by Percentage (Cho
- 25: Dividend allocation by percentage (Chc
- 54: Donor Chooses an Organization
- 121: Donor Chooses Multiple Organization



The diagram illustrates a business process for a donor. It starts with a start event 'Access JKE Website'. The process then flows through several tasks: 'Provide Secure Profile Info to Access Account', 'Select Allocate Dividend Option from "I Want To"', and 'Choose a Specific Account'. An 'Or' gateway follows, leading to 'Choose Option Allocate Dividend %' and 'Provide % and Organization Details'. The diagram includes a toolbar with various BPMN symbols like Pools, Lanes, Tasks, Annotation, Events, Data Object, Message, and Decisions.

# Use Case Diagrams

The screenshot displays the IBM Rational software interface. On the left, a use case diagram for 'JKE - Account Us' shows actors 'Customer' and 'Registered User' connected to use cases: 'Browse JKE website', 'Open an account', 'Access an account', and 'Update profile account information'. A note indicates 'Has JKE Profile, whereas Customer does not'. Below this, a smaller diagram shows a 'Donor' actor connected to a 'Dividend Processing for a Cause' use case. On the right, the 'Create Link' panel is open, showing 'Linking from artifact: 47: JKE Enterprise Diagram' and 'Link type: Parent Of'. It offers options to 'Link to an artifact' or 'Link to web' and lists search results for artifacts like '121: Donor Chooses Multiple Organizations' and '22: Allocate dividends by amount and frequency'. Below the diagram, a 'Links (1-15 of 26)' panel shows a list of links, including '22: Allocate dividends by amount and freq' and '21: Apply for Organizational Funding (Apply)'. A central callout box titled 'All Project Team Members' features an illustration of two people at computers. A dashed blue box highlights 'RRC Use Cases' with a list of benefits.

**RRC Use Cases**

**Capability**

- Use Case Diagrams
- Element Traceability to Use Case Description

**Benefits**

- Visually Represent How Your Product is Used
- Consistent Visual Notation Across Requirements for Consistent Team Understanding

# User Interface Sketching

Development and UI Designers

**RRC UI Sketching**


**Capability**

- Design User Interfaces
- GUI Controls
- Rapid Changes Via Reusable Parts
- Interface Traceability

**Benefits**

- Visually Represent Software and Gain Conceptual Understanding/Agreement From Non-technical Stakeholders
- Collaborate Across Projects on Interface Proposals

# User Interface Storyboard



Development and UI Designers

## RRC Interface Storyboard

**Capability**

- Storyboard Layout
- Frame List
- GUI Controls
- Sketch Reuse
- Interface Traceability

**Benefits**

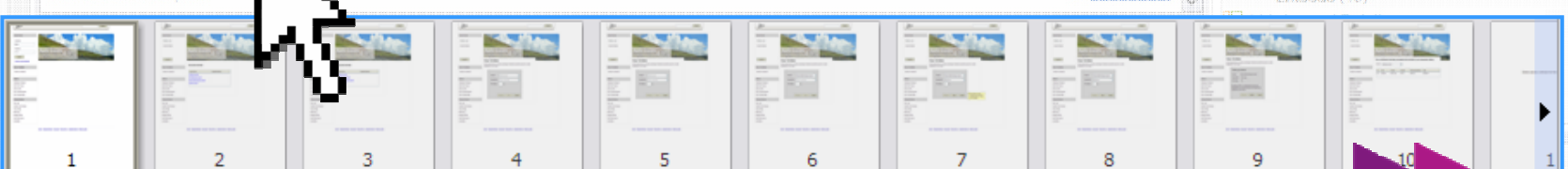
- Layout Timeline for Flow Understanding and Collaboration
- Gain conceptual understanding and agreement from non-technical stakeholders

**Links (14)**

- Illustrates (4)
  - 99: Allocate dividends by Percentage
  - 23: Allocating Dividends to Cause
  - 54: Donor Chooses an Organization
  - 121: Donor Chooses Multiple Organization
- Embeds (10)
  - 114: Account Details
  - 63: Accounts Overview (Home Page)
  - 63: Accounts Overview (Home Page)
  - 100: Dividend contribution - confirmation
  - 100: Dividend contribution - confirmation

**Frame List** Create your storyboard frame list. Press 'Enter' to create a new frame. Use Ctrl+Click on a frame to edit it.

1. Log on to JKE	<a href="#">SimpleSketch</a>
2. Accounts overview	<a href="#">SimpleSketch</a>



# User Interface Screen Flow



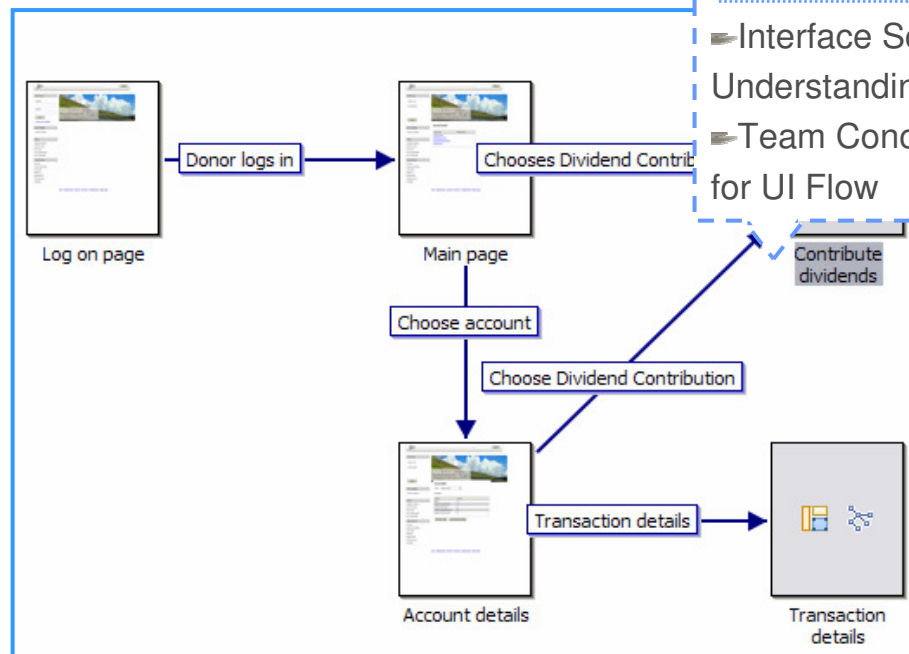
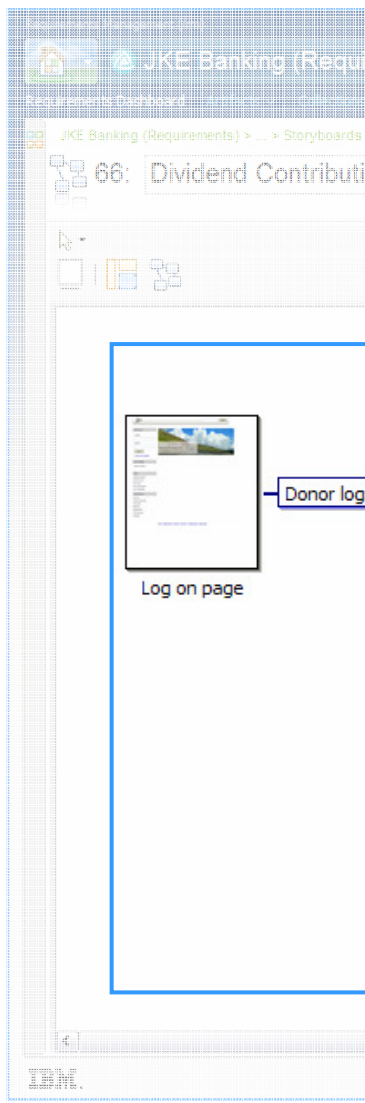
**RRC Interface Screen Flow**

**Capability**

- Interface Screen Flow
- UI Process
- GUI Controls
- Interface Traceability

**Benefits**

- Interface Screen Flow Understanding and Collaboration
- Team Conceptual Understanding for UI Flow



Core Functionality, Release 1

Save Done Cancel

button - screen flow  
flow of dividend contri  
anking (Requirements)  
2011 3:14:04 PM  
Admin  
2011 3:14:36 PM  
Admin

en Flow  
nFlow  
dived

Links (8)

- Illustrates (3)
  - 99: Allocate dividends by Percentage
  - 54: Donor Chooses an Organization
  - 121: Donor Chooses Multiple Organization
- Embeds (5)
  - 114: Account Details
  - 63: Accounts Overview (Home Page)
  - 100: Dividend contribution - confirmation
  - 35: Dividend contribution - page 1
  - 83: Log In Page

# Review (Collaboration)

**RRC Review**

**Capability**

- Review Process
- Team Collaboration Support
- Review Status
- Email Notification

**Benefits**

- Manage Team Review Process For Requirements (Gather Feedback and Improve Information Clarity and Intent)
- Improve Requirement Quality Through Discussions with Other Team Members
- Receive Email Alerts

ID	Artifact	Version	Status
60	Available Balance	Nov 1, 2010 1:18 PM	2 Reviewed
65	BASEL II	Nov 1, 2010 1:31 PM	1 Reviewed, 1 Abstained
64	Bank Statement	Nov 1, 2010 1:31 PM	2 Reviewed
62	Balance of Account	Nov 1, 2010 1:22 PM	2 Reviewed



# Review (Collaboration)

**All Project Team Members**

Participant	Status
Ursula	25% reviewed
1. Organization	Not started
2. Donor	In progress
3. Dividends for a Cause	Not started
4. Business Recovery Matters	Approved

Artifact	Status
Tanuj	Not started
Bob	Not started
AI	Approved
Curtis	Abstained
Ursula	Approved
Deb	Not started
Marco	Reviewed

**RRC Review (Collaboration)**

**Capability**

- Discussion Collaboration Support
- Review/Approval Workflow
- Email Notification

**Benefits**

- Improve Requirement Quality Through Team Discussion
- Controlled Formal Review Provides Signoff Process
- Email Broadcast Discussion Statements To One Or Many Team Members

**Artifact Comments (11)**

- Tanuj Now: Reviewed in 'Review project terms' Donor
- Marco 1 minute ago: Reviewed in 'Review project terms' Business Recovery Matters
- Ursula 5 minutes ago: Approved in 'Review project terms' Agree with the definition. Just won't there a third investment option? Business Recovery Matters
- Curtis 5 minutes ago: Abstained in 'Review project terms' Out of office on vacation Business Recovery Matters
- Curtis 5 minutes ago: Abstained in 'Review project terms' Out of office on vacation Dividends for a Cause
- Curtis 5 minutes ago: Abstained in 'Review project terms' Out of office on vacation Dividends for a Cause

# Traceability (Analysis Tools) – Grid View



**75: Dividend Allocation by Percentage**

**Status** **Summary**  
 ✓ Done Dividend Allocation by Percentage

**Details**  
 Type: Story  
 Filed Against: JKE/BRM  
 Story Points: 8 pts  
 Progress:   
 Team Area: Business Recovery Matters / JKE Banking  
 Creation Date: September 1, 2010 10:18 AM  
 Created By: Bob

**Tags:**  
 Owned By: Deb  
 Priority: High  
 Planned For: Sprint 1  
 Resolution Date: October 1, 2010 10:18 AM  
 Resolved By: Deb

**Quick Information**  
 Subscribers (1): B  
 Children (1): 57  
 Implements Requirement (1): 1  
 Tested By Test Case (1): 1

**Description**  
 Customers will be able to allocate their contributions from a number of dividend centers

[Show More](#)

## RRC Traceability (Grid View)

### Capability

- Traceability Using Link Types
- Dynamic Lifecycle Traceability
- Multi-level (end to end)
- Traceability Analysis Views

### Benefits

- Understand Relationships
- Coverage, Gap, Impact and Requirements Change Analysis

ID	Name	Artifact Type	Implemented By	Validated By
8	Dividend allocation by percentage	Feature	75: Dividend Allocation by Percentage	18: Dividend Allocation by Percentage
11	Customers can nominate an organization for the program	Feature	67: Customers can Nominate an Organization	21: Customers can nominate an organization for the program 10: Customers can Nominate an Organization
12	Donor Dividend Allocation Criteria	Feature	73: Donor Dividend Allocation Criteria	16: Donor Dividend Allocation Criteria
<b>Satisfied by</b>				
23	Frequency of dividend transfer	Feature	58: Frequency of dividend transfer	1: Frequency of dividend transfer

# Traceability (Analysis Tools) – Tree View

**RRC Traceability (Tree View)**

**Capability**

- Traceability Using Link Types
- Dynamic Lifecycle Traceability
- Multi-level (end to end)

**Traceability Analysis Views Benefits**

- Understand Relationships
- Discover Downstream Status and Change Through Attributes
- Coverage, Gap, Impact and Requirements Change Analysis

**Business Analysts, Team Leads**

**Configure Tree**

For each artifact type displayed, you can specify which links to show in the tree view, based on the link type and artifact type of the link target.

Source artifact type(s)	Link types to show	Link targets to show
Feature	Satisfied by	User Story Elaboration
User Story Elaboration	Illustrated By, Satisfied by	Any
Stakeholder Need	Satisfied by	Feature

Apply Cancel

ID	Name	Artifact Type	Last Modified By	Last Modified Date
31	Donors can choose to support an organization	Feature	Kirk	Feb 18, 2011 7:04:17 AM
Satisfied by				
69	Donor Chooses an Organization	User Story Elaboration	Kirk	Feb 18, 2011 7:04:23 AM
Illustrated By				
60	Divident contribution - page 1	Sketch	Kirk	Feb 18, 2011 12:07:24 PM
14	JKE Enterprise Diagram	Use Case Diagram	Kirk	Feb 18, 2011 7:04:14 AM
54	Allocate dividends by Percentage	User Story Elaboration	Kirk	Feb 18, 2011 7:04:27 AM

# Requirements Analysis Tools (Filtering)

ID	Name	Artifact Type	Business Priority	Status	Validated By
40	Customers can nominate an organization for the program	Feature	Should	Draft	10: Customers can Nominate an Organization
50	Organization must provide justification why funds are needed	Feature	Could	Draft	12: Organization must provide justification for why funds are needed
	Requests sent in form of hard copy mail	Feature	Should	Under Review	4: Process hard copy requests
103	Requests sent in form of hard copy mail	Feature	Should	Under Review	4: Process hard copy requests

### RRC Analysis Tools

**Capability**


- Filter (Attribute, Link, Value, Tag)
- Tagging
- Sort

**Benefits**

- Filter/Sort/Tag to Generate Valuable Reports Directly in RRC
- Develop Filtered/Sorted Views To Discover Trace Gaps, Priority, Changes, or Other Process Reports
- Tag Related Information for Improved Management

**Product & Project Managers**

# Audit Trail History (Analysis Tools)



All Project Team Members

**RRC Change History**

**Capability**

- Change History of All Revisions
- Previous Revision Access
- Automated Audit History Tracking
- Difference Change Mark-up
- History/Reversion Query

**Benefits**

- Access all Prior Revisions of Each Artifact for Change Assessment
- Explore / Analyze Changes
- Restore Previous Versions if Mistakes are Made

JKE Banking (Requirements) > JKE Private Banking and Securities Project > Use Case Content > 28: Open an account Mar 17, 2011 3:14:49 PM

Show Previous Revisions Show Change History

Today (0) Yesterday (3)

Expand All | Collapse All

Andy - Admin changed on Mar 17, 2011 3:14:49 PM

Tag	added: Private Banking & Securities
-----	-------------------------------------

Andy - Admin changed on Mar 17, 2011 3:14:28 PM

Object Type	added: Use Case Specification
Attribute	added: Description
Attribute	added: Status Approved
Attribute	added: Title <u>Open an account</u>
Attribute	added: Primary Text <a href="#">Show changes</a>
Attribute	added: Priority Low

Andy - Admin changed on Mar 17, 2011 3:13:57 PM

Attribute	added: Artifact Format Text
-----------	-----------------------------

# Collections

ID	Name	Artifact Type	Last Modified By	Last Modified Date
19	Core Functionality	Iteration Collection	Andy - Admin	Mar 17, 2011 3:14:25 PM
53	Release 1 Planning	Release Collection	Andy - Admin	Mar 17, 2011 3:14:34 PM
70	Project Glossary	Glossary Collection	Andy - Admin	Mar 17, 2011 3:14:37 PM
81	Release 1 Capabilities	Release Collection	Andy - Admin	Mar 17, 2011 3:14:39 PM
84	Extended Functionality	Iteration Collection	Andy - Admin	Mar 17, 2011 3:14:40 PM
105	Enterprise Glossary	Glossary Collection	Andy - Admin	Mar 17, 2011 3:14:44 PM

**RRC Collections**

**Capability**

- Group Requirement Artefacts Together as Collections

**Benefits**

- Organise Release Requirements
- Seed Development And Test Plans; Automatically Create Project Trace Links
- Use In Dev And Test Plans

**Product & Project Managers**

# Project Snapshot

**Business Analysts**

**Project Snapshot: 03/19/2011 1:14:44 PM**  
Baseline snapshot

Yesterday (0) Past Week (0)

**View All Artifacts** ?

Page size: 20

ID	Name	Artifact Type
14	Dividend processing payment is a one time transaction.	Feature
25	Dividend allocation by percentage	Feature
29	Organization must identify how much money is desired	Feature

**RRC Project Snapshot**

**Capability**

- Snapshot for Project Requirements (Read-Only)

**Benefits**

- Capture Project/Artifact State At Important Points in Time (Baselines)
- Analyze and Discover Changes to Your Artifacts

## Embedded Artefacts (Requirements Reuse)

**Insert Artifact**

Select an artifact to insert

Select project area: JKE Banking (Requirements)


Select Link Type: No Traceability Link

Search for artifacts by id or for words contained in the name:

Search...

Select artifact from the following recently visited artifacts: Displaying 1-3 of 3 matches

- 104: Promote JKE Corporate Image
- 73: Healthy Customer Ecosystem
- 77: Give Back



**Analysts,  
Development**

**Artefact Embed (Reuse)**

**Capability**

- Artefact Embed
- Embedded Artefact Views

**Benefits**

- Change Common Requirements in Single Location
- Parallel Development
- Reuse Requirements from Other Products that Apply to New Project

What is the goal of a user? Use 2-3 sentences to capture the intent of the user story. For example, as a (user role), I want to (achieve a goal) so that I can (provide a reason).

**Card**

Donor(s) can choose to allocate a specific percentage of their dividends to support organizations.

**Conversation**

1. Initial capability:



# Export CSV (Spreadsheet)



## RRC CSV Export

### Capability

- Export for CSV
- View/Filter Export

### Benefits

- Export existing requirements for use in other tools (for further Analysis)
- Create ad hoc Spreadsheet Reports
- Share Requirements with Partners

The screenshot shows the 'JKE Banking (Requirements)' interface. A message at the top states: 'The export operation has begun. This could take a while depending on how many artifacts you have selected.' Below this, the breadcrumb path is 'JKE Banking (Requirements) > JKE Business Recovery Matters Project > Collections > 53: Release 1 Planning'. There is an 'Add Artifact' button and a 'View All Artifacts' button. A table of artifacts is visible, with columns for ID, Name, and Type. The table shows three rows of data:

ID	Name	Type
14	Dividend processing payment is a one time transaction.	Feature
15	Donor Dividend Allocation Criteria	Feature
16	Donors Deposit Money in a Pooled	Feature

The screenshot shows a Microsoft Excel spreadsheet titled 'export.csv'. The data is organized into columns: Identifier, Artifact for Type, Origin, Created On, Product On, Modified On, Creator, Stability, Descriptor, Difficulty, Role, Priority, Title, Contributor, and Status. A mouse cursor is pointing at the 'Priority' column.

Identifier	Artifact for Type	Origin	Created On	Product On	Modified On	Creator	Stability	Descriptor	Difficulty	Role	Priority	Title	Contributor	Status
22	Text	User Story	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium				Medium	Allocate di	Andy - Adi	Under P
87	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Medium			Requests	Andy - Adi	Approve
40	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Medium			Customers	Andy - Adi	Draft
99	Text	User Story	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	High				High	Allocate di	Andy - Adi	Approve
86	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	High		Low			Organizati	Andy - Adi	Approve
54	Text	User Story	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	High				High	Donor Cho	Andy - Adi	Approve
95	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Low			Frequency	Andy - Adi	Approve
16	Text	Feature	Customer	March 17, 2011 3:13:1	March 17, 2011 3:13:1	Bob	Medium		Medium			Donors De	Andy - Adi	Approved
14	Text	Feature	Customer	March 17, 2011 3:13:1	March 17, 2011 3:13:1	Bob	High		Medium			Dividend pi	Andy - Adi	Approved
80	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	High		Medium			ation b	Andy - Adi	Approved
91	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Low		Low			Charit	Andy - Adi	Approved
103	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Medium			ngs	Andy - Adi	Under Revi
89	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Medium			ors will	Andy - Adi	Approved
29	Text	Feature	Customer	March 17, 2011 3:13:1	March 17, 2011 3:13:1	Bob	High		Low			nizati	Andy - Adi	Approved
88	Text	Feature	Customer	March 17, 2011 3:14:1	March 17, 2011 3:14:1	Bob	Medium		Low			zati	Andy - Adi	Approved
15	Text	Feature	Customer	March 17, 2011 3:13:1	March 17, 2011 3:13:1	Bob	Medium		Medium			D	Andy - Adi	Approved
25	Text	Feature	Customer	March 17, 2011 3:13:1	March 17, 2011 3:13:1	Bob	High		Medium			Dividend al	Andy - Adi	Approved

# Publish Document (PDF)



**Document  
Controllers, Team  
Leaders**

requirements

Banking and Securities Project > Use Case Content >

Create PDF Document : Open an account

Include Comments

Include Attributes

OK Cancel

**RRC Document Publish**

**Capability**

- PDF or Microsoft Word Output
- Use OOTB Templates
- Take Data Offline

**Benefits**

- Useful for meetings and external stakeholders
- Partner/Collaborator Document Delivery

requirement\_2qoxkVDjEeCu6vkqVIRGqw.pdf - Adobe Acrobat Pro

File Edit View Document Comments Forms Tools Advanced Window Help

Printable version March 18, 2011

**1 Open an account**

1.1 Overview

Name:	Open an account
Type:	Use Case Specification
Project:	JKE Banking (Requirements)
Created On:	March 17, 2011 15:13:57
Creator:	Andy
Last Modified:	March 17, 2011 15:14:28
Artifact Revision URL:	Open an account Revision 7UWuIlDiEeCu6vkqVIRGqw

1.2 Attributes

Name	Value
Priority	Low
Status	Approved
Identifier	28

1.2.1 Artifact Content

**2 Use Case: Open an Account**

2.1 1.0 Brief Description  
A customer has accessed the JKE website and would like to open an Account.

2.2 2.0 Applicable Actors  
A Customer would like to open an account.  
A Registered User would like to open a new account.

2.3 3.0 Basic Flow of Events

1 The JKE website is accessed.

1 A registered user will provide their secure profile content and is directed to his/her account details.

1 From the account details a registered user requests to open an account.  
2 The registered user specifies the type of account which will be opened

2.1 Based on the account type chosen the user will be provided with different options

2.2 If there are specific business rules that are applicable given the type of account chosen, the registered user will be informed of these restrictions.

2.3 If the registered user is required to visit a bank location, he/she will be informed of this requirement and will be provided the contact information of a Personal Banker for assistance.

Confidential Page 2 of 3

# Grid View Report (MS Word)

JKE Banking March 18, 2011

Traceability Summary

**1 Donor Dividend Allocation Criteria**

**1.1 Details**

Identifier: 15  
 Title: Donor Dividend Allocation Criteria  
 Type: Text  
 Modified: March 17, 2011 15:14

**1.2 Links**

Identifier	Link Title	Link Description	Type
53	Release 1 Planning		Release Collection
81	Release 1 Capabilities		Release Collection
84	Extended Functionality		Iteration Collection
18	Business Recovery Matters Vision		Vision
18	Business Recovery Matters Vision		Vision
95	Frequency of dividend transfer		Feature
25	Dividend allocation by percentage		Feature
80	Donation by Amount		Feature
113	Donor		Term
70	Implemented By		OSLC Link
ycNMov DkEeCFos ghlogLw	Validated By		OSLC Link

Confidential Page 6 of 21



## Create a Report

- 1
- 2
- 3 Report Information

### Report Information

Name

Name:

Append date/time information to the report name

Type:  PDF  Microsoft Word

#### Additional Report Information (Optional)

Author Name:

Company Name:

Footer Text:

Mark Confidential:

Logo Image:

- 
- 

## RRC Document Publish

### Capability

- PDF or Microsoft Word Output
- Use OOTB Templates
- Take Data Offline

### Benefits

- Useful for meetings and external stakeholders
- Partner/Collaborator Document Delivery

Customers can Nominate Organization

Donation amount limits

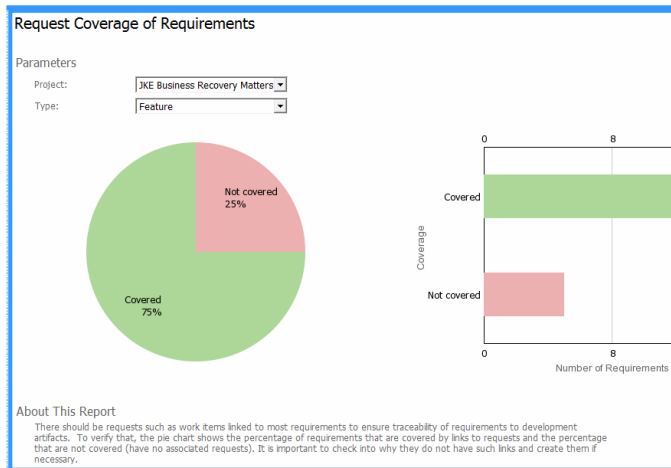
Verify dividend transfer frequency

Process hard copy requests

Dividend Allocation by percentage

Organization must identify how much money is desired

# Data Warehouse and Web-based Metric Reports



## RRC Reporting

### Capability

- Data warehouse and web-based reports
- Rational Insight
- Use OOTB Reports (Coverage, Open Defect, Distribution, Execution Results, Traceability, Test Coverage/Trends)

### Benefits

- Reporting for Development Intelligence
- Discover Requirements Impact and Change

### Select the Artifacts

#### Requirements traces to Requests

Row	Tag	Name	Type	Status	Request ID	Request Type
1	22	<a href="#">Organizations can apply</a>	Feature	Approved	66	Story
2	23	<a href="#">Requests sent in form of email</a>	Feature	Approved	73	Defect
3					56	Story
4	24	<a href="#">Organizations may apply with an initial request</a>	Feature	Approved	59	Story
5	27	<a href="#">JKE Charity Coordinator will respond to request in the website triggering...</a>	Feature	Approved	71	Defect
6					72	Defect
7	34	<a href="#">Donation by Amount</a>	Feature	Approved	64	Story

#### Requirements traces to Test Cases

Row	Tag	Name	Type	Status	Test Case ID	Test Case Name
1	13	<a href="#">Donors can choose to support an organization</a>	Feature	Approved	7	<a href="#">Donors Can Choose to Support an Organization</a>
2	14	<a href="#">Dividend allocation by percentage</a>	Feature	Approved	16	<a href="#">Dividend Allocation by Percentage</a>
3	22	<a href="#">Organizations can apply</a>	Feature	Approved	13	<a href="#">Organizations can Apply</a>

### Requirements Distribution



# Import Microsoft Word or CSV

**Import Document**

Import a Microsoft Word, OpenDocument, Open Office, or rich-text document.

**Limitations:**

Does not convert: table of contents, VBA macros, mail merge fields, frames, drawings, .emf, .wmf, and .pict format embedded objects, columns (are not preserved), table styles, Word Art, OLE objects (like Visio), embedded XML, document properties, or document comments.

File: \*

Artifact Name:

Folder:

Artifact Type:

Import Options:

- Import for viewing use
- Import for editing and reviewing
- Create RRC comments for Word comments

---

**Import Requirements**

File to Upload: \*

Location

Folder:

---

**RRC Data Import**

**Capability**

- Import/Export for CSV
- Import (RTF Convert) for Word
- Generic Data Migrate (CSV)

**Benefits**

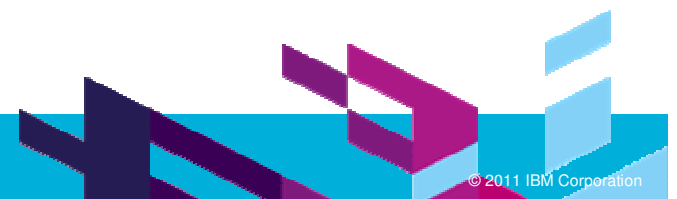
- Import Information Received From External Sources or Created Off-line
- Migrate Existing Project Requirements
- Reuse Data from Other Tools
- Export Information for Off-line Use

---

**All Project Members**

# QUESTIONS

[www.ibm.com/software/rational](http://www.ibm.com/software/rational)





[www.ibm.com/software/rational](http://www.ibm.com/software/rational)

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