





Getting started with IBM Rational Focal Point

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Table of contents

ntroduction	4
Prerequisites	5
Creating a module of elements	6
Adding attributes that describe the elements	9
Adding elements1	3
Creating a view of the elements1	5
Displaying the elements1	8
Table1	8
Relational graph1	9
Attribute statistics	0
Traceability matrix	1
Gantt2	2
History2	2
What's New	4
Creating criteria for prioritizing your elements 2	5
Prioritizing your elements 2	9
/isualizing your results	1
Printing a report	5
Summary and next steps	6
Nore information	7
Contacting IBM Rational Software Support	7
Prerequisites	7
Submitting problems	7
Notices	9
Trademarks 4	0

Introduction

This document is intended to guide you through a few basic tasks in IBM® Rational® Focal Point: from setting up a simple module, through prioritization and visualization, to printing. By following the Cars example in this guide, you can learn to use the basic decision-making features of the product and to analyze and draw conclusions from the results. You can learn how to add a module that contains information about cars, add some cars, prioritize them according to design and cost, and then see which one is best according to certain criteria.

To better understand the tasks in this guide, note these basic concepts:

- Module The repository in which you store all information is structured in a number of modules. Different types of information are handled in different modules. A module contains elements, and all elements within the same module share the same set of attributes. Build a module for each type of information, and use different modules for different levels of information.
- Element Each module contains elements. For example, a module called Cars contains the elements Car 1, Car 2, Car 3, Car 4, Car 5, Car 6, and Car 7.
- Attribute All elements are composed of a set of attributes. For example, the element Car 1 contains the attributes ID, Title, Description, Type, and Price.
- View A view is a way of displaying information that is stored in the repository (the modules). Only administrators have access to the repository normal users only see information through views that the administrator creates. For Rational Focal Point, a view is what the user is *allowed* to see; a view normally contains only a subset of the information in the repository. For example, a view can be defined to display only elements that have a New status, or all elements that have been assigned to a certain user.

Prerequisites

To complete the tasks in this guide, you must be the administrator for a workspace in Rational Focal Point. You can use either an installed local version of the tool on your computer, or a hosted installation. The example and screenshots in this document are based on a fresh workspace, with no other modules than the ones that are created automatically with a new workspace. However, to complete these tasks, you do not have to use an empty workspace; the module in the example can be created in any workspace.

The screenshots in this guide are based on Rational Focal Point version 6.4.1.

Creating a module of elements

Create a module that can contain the elements to manage. You must be a workspace administrator to create and change a module. When you create a module, you choose the information attributes (for example, size, speed, and status) that you want the elements to contain.

To create a module:

1. In the navigation bar, click **Configure** and then click **Modules**.



A list of all of the available modules is displayed. (You might have other modules in your list than those shown in the image.)

2. Click the **Add Module** button.

Image: Second secon	May Be Configured By members All Administrators a members All Administrators a members All Administrators a members All Administrators are the lease are All Administrators belase are All Administrators belases belase belases are All Administrators belases
Reports Name Add Button Name Description Configure Workspace Belements A module where the m add and organize any elements. When a new is added to the workspace adways of this type. Modules Criteria Criterion The module where the m add and organize any elements. When a new is added to the workspace adways of this type. Notifications Criteria Criteria are used where the criteria are used where the criteria. Members Information Releases The module where releases a percequisites when releases a percequisites when releases a percequisites when releases a paner. Movanced Saved Baselines The module where the m add and organize any elements.	nembers All Administrators 2
Reports Configure Workspace Workspace Attributes Attributes Views Notifications Integrations Attributes Attributes Image: Attributes<	nembers All Administrators 2
Configure add and organize any elements. When a new is added to the worksg always of this type. Workspace add and organize any elements. When a new is added to the worksg always of this type. Attributes criteria Ontifications criteria Criteria Criteria Criteria Criteria are used where criteria. Information The module where relises a percequisites when relises a percequisites when relises a parered bine releases a stored. Baselines Baselines Weiws Views Views Views Yiews View Advanced Yiews	kind of worddle pace it is semembers All Administrators eria. m ements or semembers all Administrators are the lease are All Administrators selines are All Administrators emembers emembers emem
Image: Attributes ** Criteria Criterion The module where the add and organize crite criteria are used where the add and organize crite criteria. Integrations Integrations Integrations Integrations Information Information The module where releases a prerequisites when releases a prerequisites when releases a stored. The module where the module where the stored. The module where the add and organize any elements. When a new Information Easelines Baselines Image: Views View A module where the module where t	eria. en in ements or leases are All Administrators elase by the selines are All Administrators emembers All Administrators emembers All Administrators emembers All Administrators emembers em
Workflows Members Information Advanced Advanced Views Views View Kelease Release Rele	are the lease sy the selines are All Administrators
Information plans are generated by release planner. Advanced Saved Baseline The module where bas stored. Baselines Stored. Stored. Image: Views View A module where the madd and organize any elements. When a new store and when the madd and organize any elements.	ay the selines are All Administrators 🔶 members All Administrators 🖨
Baselines stored. Baselines view A module where the m add and organize any elements. When a new	nembers All Administrators 🚖
add and organize any elements. When a new	
always of this type.	w module
Checkpoints Checkpoint The module where the add and organize checkpoints are used members review elem	when the
If Resource Resource Type The module where resource Types are stored. The types are stored. The types can be prerequire release plana rangement the release planaer.	resource visites when
Saved Chart The module where save are stored.	ved charts All Administrators 🔶
Saved Report A module where gener Reports reports can be saved.	

3. Enter a name for the new module, a label for the Add button that will be displayed later, and a short description of the module.

Configure > Modules		Getting Started	M
. .	Enter information al	bout the new module, and click OK.	
Modules	Name	Cars	
Reports	Add Button Name	Car	
Configure	Alias	58226cc0-4951-40a1-b451-f.4c601e7:	
🔂 Modules	Description	This is my cars module	
Attributes Views Notifications Integrations Alias			
+B+ Workflows	Position in Module List	Last	
Information	Prefix Attribute	ID	
Advanced	Icon Attribute	2010 20	
Advancea	Sort Attribute		
	Display Folder Icons	E	
	Default Icon	Click to select another icon.	
	May Be Configured By	➢ Members ∯ ☐ Mikael Norbäck	
	Disable Delete		
	Hide Add Views In Menu		
	Hide Module		
	Baseline Version Control	None	
	A 40 - 57 - 56 - 57 - 57 - 57 - 57 - 57 - 57	None	

4. Click **OK**. A window opens and displays a message about defining the attributes for the module. Click **OK**.

Adding attributes that describe the elements

After you create the module, you will see a list of the pre-defined attributes. For the purposes of this example, you need to add two more attributes to provide information about the type and price of the car.

To add attributes:

1. Add the Type attribute, which is a typical choice type of attribute because the selection can be only one of a predefined set, in this case either Sports, or Sedan, or Estate. Click **Add Attribute**, and then click **Choice**.

onfigure > Attributes in Modu	ıles				Getting Started			
} ∙	Cars: Click t attribute.	he attribute you wa	ant to configu	ure, or click	Add Attribute to ad	d a	ne	w
Modules Reports	— I.		Administrator	L.				
Configure	Name ID	Description Unique ID	Notes	Type Unique id	Log Changes Mandator Yes	y E3	ж	4
Workspace	Title	A short and concise explanation of the		Text	Yes	E		-
Attributes		element.						
Notifications	Description	A thorough explanation of the element.		Text	Yes	E	×	4
Go Integrations Alias Workflows	Element Information			Heading		83	×	40
Members	Owner	The user owning the element.		Element Information		E	×	AP.
Information Advanced	Creator	The user creating the element.		Element Information		8	×	40
	Created Date	The date the element was created on.		Element Information		E	×	40
	Last Changed By	The user last changing the element.		Element Information		E	×	40
	Last Changed Date	The date the element was last changed on.		Element Information		Es	×	40
	Parent Folder	The parent folder of the element.		Element Information		E	×	40
	Parent Folder					E	×	

onfigure > Attributes in Modules		Getting Started
▶ •	You may add the	following attributes to this module
Modules	Check box	A box that a member can select or clear to turn an option on or off.
Reports	Choice	A list of predefined items that a member may select a single item from (e.g. status).
Configure	Date	A date value (for example 3/31/2010).
🔟 Workspace 🎧 Modules	File	A document, image or other file in the database, or a list of such files. Maximum total size is 50 MB.
Attributes	Float	A real number that contains a fractional part (e.g. 3.14).
Views	Heading	An attribute consisting only of a title, used primarily for layout purposes
Notifications	History	History can display attribute or element history for an element.
Alias	Incoming Links	A list of elements that link to this element.
₩ Workflows	Integer	A real number that contains no fractional part (e.g. 42).
Members	Link	A link from one element to another. The target can be either in this workspace, or in another workspace.
Information	List (text or link)	A list is a collection of either text attributes or link attributes.
Advanced	Matrix	A matrix attribute consists of several text, float or integer attributes in a grid.
	Mirror	A mirrored value of another attribute in another element.
	Multichoice	A list of predefined items that a member may select multiple items from.
	Text	A text field where a member enters and edits text.
	Time Grid	Use this for calculations based on a time line.
	URL	A link to a specific resource on the Internet (e.g. http://www.ibm.com).
	Unique id	A text field where the value must be unique. When new elements are created, the unique id attribute is automatically assigned a unique value
	Version	A number or character that automatically increases based on changes in other attributes.
	You may add the	following special attributes to this module
	Lock	A selection of attributes that can be locked from editing. When the lock attribute is activated for an element the attributes selected in the lock attribute cannot be edited and the element cannot be deleted.
	< Back	

2. Edit the name and the description of the attribute, and then add choice items by clicking the link next to Items.

Configure > Attributes in Modules			Getting Started	~
. .	Cars: Add Choice	attribute		-
Modules	General Settings	\frown		
Reports	Name	Туре		
Configure	Alias	0feaf9ec-7c4c-403e-aaae-056400ab9d		
🔲 Workspace		Type of car		
Modules	Description	Type or car		
Attributes				
Notifications				
Integrations				
Alias				
+B+ Workflows	Administrator Notes			-
Members				
Information				
Advanced	Position Before	Last		
	Value Settings			
	Default Value	×		
	Items 🤇	Click here to add and edit choice items		
	Visual Settings			
	Sort Alphabetically	✓		
	Allow Group By	V		
	Propagate Settings			
	Propagate			
	Cascade Settings			
	Cascade	No		
	Display Parents			
	Item Separator	:		
	Mandatony Cottings			~
	< Back OK	1		

3. Add three items: Sports, Sedan, and Estate.

Add Choi	ce Item
Name	Sports
Description	
Position	Last 💙
Icon	Click to select another icon.

Your list should look as follows:

ck an i new ite	item to edit it, or click Add Item to a em.	d	d
Name	Description		
Sports	3	Ç	V
Sedan	3	C	¢
Estate	3	¢	

4. Return to the list of attributes by clicking **OK** twice. Note that the Type attribute is last in the list. You can move the attribute by clicking the arrows in the list. Move the Type attribute above Element Information.

					Getting Started		_	~
	Cars: Click t	he attribute you wa	ant to configu	ure, or click	Add Attribute to ad	d a	ne	w
iles	Geenbarer		Administrator					
orts	Name	Description	Notes	Туре	Log Changes Mandatory	1		
igure Workspace	ID	Unique ID		Unique id	Yes	8	×	0
Modules Attributes	Title	A short and concise explanation of the element.		Text	Yes	•	×	4
Views Notifications	Description	element. A thorough explanation of the element.		Text	Yes	B	×	4
Integrations Alias	Element Information			Heading		8	×	
Workflows	Owner	The user owning the element.		Element Information		E	×	0
mation	Creator	The user creating the element.		Element Information			×	0
Advanced	Created Date	The date the element was created on.		Element Information		8	×	0
	Last Changed By	The user last changing the element.		Element Information		E	×	4
	Last Changed Date	The date the element was last changed on.		Element Information		13	×	0
	Parent Folder	The parent folder of the element.		Element Information		•	×	0
	Туре	Type of car		Choice		E	×	4
	By Last Changed Date Parent Folder	the element. The date the element was last changed on. The parent folder of the element.			Information Element Information Element Information	Information Element Information Element Information	Information Element Element Information Information Element El	Information Element Element Element Information Element Information

5. Add the Price attribute. This is a typical integer. Click **Add attribute** and select **Integer**. In the **Name** field, type Price, and in the **Description** field, type The price of the car. Move the Price attribute above Element Information.

onfigure > Modules				Getting Started	
₽ .			prerequisites when release plans are generated by the release planner.		(
Modules	Saved Baselin	Baseline	The module where baselines are stored.	All Administrators	¢
Reports Configure Workspace	Views	View	A module where the members add and organize any kind of elements. When a new module	All Administrators	¢
Modules			is added to the workspace it is always of this type.		
Notifications	🗹 Checkp	oints Checkpoint	The module where the members add and organize checkpoints. Checkpoints are used when the members review elements.	All Administrators	¢
Alias +⊪ Workflows	hite Resource وَالْمَعَامَ الْمَعَامَ الْمُعَامَ الْمُعَامَ الْمُعَامَ الْمُعَامَ الْمُعَامَ الْمُعَامَ الْمُعَ Types	ce Resource Type	The module where resource types are stored. The resource types can be prerequisites when	All Administrators	¢
Members			release plans are generated by the release planner.		
Information Advanced	Saved Charts	Chart	The module where saved charts are stored.	All Administrators	¢
	Saved Reports	Report	A module where generated reports can be saved.	All Administrators	¢
	(§) Membe	rs Member	Users in the database must be members of a workspace to be able to access the workspace. All members of the workspace are listed in this module. Members get access to the elements in the modules via views. Members that also are administrators also have access to the modules.	All Administrators	¢
	륑X Saved I	Plans Plan	The module where release plans are stored. A release plan contains the results of a member's work with the release planner.	All Administrators	¢
	Cars	Car	This is my cars module.	All Administrators	🗙 🗳 🔶 .
	Add Modu	le] [Import Module)		

You now have a module that contains elements representing car information:

6. In the left navigation bar, click **Modules** and then click **Cars**. The tree view of cars opens. To add cars to your module, in the bottom frame, click the **Add Car** button.



Adding elements

1. Add the following cars by entering the Title, Type, and Price attributes for each as follows:

Title (make)	Туре	Price
Car 1	Sports	10000
Car 2	Sedan	13000
Car 3	Sports	26000
Car 4	Estate	14000
Car 5	Sedan	18000
Car 6	Estate	20000
Car 7	Sports	28000

Confirm each addition by clicking **OK**.

A Rational Focal Point		Worksp	aces Home Prefer	ences Mikael Norbäck Hel;	p Log Out
Modules > Cars				Getting Started	~
-	Cars(1/7)	Cars		9	ê Q /
Modules	002:Car 2	ID			
Elements	- 📄 003:Car 3	Title	Cars		
Criteria	- 004:Car 4	Description			
Releases	005:Car 5	Туре	Sports		0
Checkpoints	007:Car 7	Price	2		0
Resource Types		Element In			-
Cars		Owner	Iormation		1
Saved Plans		Creator	Mikael Norbäck		0
Saved Charts					
Saved Reports		Created Date			
Saved Baselines		Last Changed By	Mikael Norbäck		
Reports		Last Changed	2009-11-18		
Configure		Date			
Members		Parent Folder	Cars		
Information					
Advanced					
	Add Car Add Folder	Import Cr	ars		
IRM.				Batio	nal. softwar

After you add the cars, you will have a module with 7 elements:

Creating a view of the elements

So far, you have worked with the Rational Focal Point repository directly. In the repository, you can add, delete, and change elements, but to explore more features of Rational Focal Point, you must define a view of the elements. Unless you are a workspace administrator, you do not have direct access to the repository; you must access the repository through views that are defined by the administrator. Views define what the user is allowed to see.

You can define views that show many subsets of your information; for example, only Estate cars, only cars that cost less than 20,000, or only those that a specific user created after a specific date.

To create a view that shows all of the elements:

 Click Configure > Views, and then click the Add View button. In the Title field, enter All cars; in the Description field, enter This view shows all elements in the Cars module.



2. Do not modify the other attributes. Click **OK**. A list of available modules is displayed, in which you define what module the view applies to:

B 1		Getting Started
₽,•	Click the module fr	om which you want to view elements.
Modules	Name	Description
Display	Elements	A module where the members add and organize any kind of elements.
Reports	Criteria	When a new module is added to the workspace it is always of this type. The module where the members add and organize criteria. Criteria are
Configure	Criteria	used when members prioritize elements or criteria.
🔝 Workspace	Releases	The module where releases are stored. The releases are the prerequisites when release plans are generated by the release planner.
Attributes	Saved Baselines	The module where baselines are stored.
	Views	A module where the members add and organize any kind of elements. When a new module is added to the workspace it is always of this type.
Integrations	Checkpoints	The module where the members add and organize checkpoints. Checkpoints are used when the members review elements.
+®+ Workflows	Resource Types	The module where resource types are stored. The resource types can be prerequisites when release plans are generated by the release
Members	Saved Charts	planner. The module where saved charts are stored.
Information	Saved Reports	A module where generated reports can be saved.
Advanced	Members	Users in the database must be members of a workspace to be able to access the workspace. All members of the workspace are listed in this module. Members get access to the elements in the modules via views. Members that also are administrators also have access to the modules.
	Saved Plans	The module where release plans are stored. A release plan contains the results of a member's work with the release planner.
	Cars	This is my cars module.

3. In the list of Modules on the left, click **Cars**. A wizard opens to guide you through a series of steps. The first in this series is a general selection rule:



This rule means that the view shows the elements that are not folders. Accept this default setting and click **OK**.

4. Click **Next**. A window opens in which you can define what attributes are visible and editable through the view:

					Ge	tting Started	
₽.	Defin	e the a	ccess l	evel for the a	ttributes in All cars, then	click Finish.	
Modules	None	Visible	Editable	Attribute	Description	Administrator Notes	Туре
Display	0		Luitable	ID	Unique ID	Notes	Unique id
Reports		-		Title	A short and concise		Text
Configure		0	۲	Title	explanation of the element.		Text
T Workspace 🔂 Modules	۲	0	0	Description	A thorough explanation of the element.		Text
Attributes	0	0	00	Туре	Type of car		Choice
T Views	0	0	۲	Price	The price of the car.		Integer
Notifications	0	۲		Element Information			Heading
alias +⊪ Workflows	0	۲	0	Owner	The user owning the element.		Element Information
Members Information	۲	0		Creator	The user creating the element.		Element Information
Advanced	۲	0		Created Date	The date the element was created on.		Element Information
	Ø	0		Last Changed By	The user last changing the element.		Element Information
	0	۲		Last Changed Date	The date the element was last changed on.		Element Information
	0	0	۲	Parent Folder	The parent folder of the element.		Element Information
				Use the arrov	v buttons to assign access for	r all attributes.	
	Misce	llaneo	us setti	ngs			
	1.172.5				ders and folders into elements w	hen using the Die	splay menu.
	Sau		nish				

Because you do not need to use all of the administrative attributes, hide the attributes that you do not want to use. For each attribute, select either **None**, **Visible**, or **Editable**, as shown in the above image.

- 5. Return to the tree structure of the views by clicking **Finish**. The view definition is shown: "All elements in the Cars module whose type is a folder is false."
- 6. According to the default behavior, the view is visible in Display menu section. To show the contents of the view that you created, click **Display > All Cars**.

Displaying the elements

Rational Focal Point has several powerful display modes that are useful in various situations. One common display mode is the tree view, which you have seen in the example about the Cars module (the repository). However, if you use the view definition that you created, some of the attributes are hidden in the tree view.



You can use these display modes:



From left to right, the modes are **Tree**, **Table**, **Relational graph**, **Attribute statistics**, **Traceability Matrix**, **Gantt**, **History**, and **What's New.** Not all of these modes are used in the Cars example.

Table

In Table mode \square , you get an overview of all the elements and the visible attributes. You can also sort elements according to an attribute. To sort the elements alphabetically according to Title, click **Title**.

splay > All cars						Gettin	g Started
} •	14	∎ <u></u> *	E @	14 🐏	◇ 🖻 券		
lodules	ID 4	Title	Туре	Price	Owner	Last Changed Date	Parent Folder
Display	001	Car 1	Sports	10 000	Mikael Norbäck	2009-11-18	Cars
All cars	002	Car 2	Sedan	13 000	Mikael Norbäck	2009-11-18	Cars
eports	003	Car 3	Sports	26 000	Mikael Norbäck	2009-11-18	Cars
onfigure	004	Car 4	Estate	14 000	Mikael Norbäck	2009-11-18	Cars
embers	005	Car 5	Sedan	18 000	Mikael Norbäck	2009-11-18	Cars
nformation	006	Car 6	Estate	20 000	Mikael Norbäck	2009-11-18	Cars
dvanced	007	Car 7	Sports	28 000	Mikael Norbäck	2009-11-18	Cars

Relational graph

In a Relational graph *, you can see all relationships between the elements: either structural (for example, by type of car, as in the next image) or linked. To use this view, note the settings in the bottom frame of the following image:



Attribute statistics

The Attribute statistics mode summarizes facts about your elements; for example, how many cars are Sports cars, how many of your requirements have the New status, or how many requirements are currently in a particular status of development.

isplay > All cars				Getting Started	<u> </u>
⊳ -	E ⊞ + E	🕼 📜 🧐 🔷 🛍 🍄			
Modules	Туре	Quantity	Share		
Display	Sports	3	42,9%		
All cars	Sedan	2	28,6%		
Reports	Estate	2	28,6%		
Configure		Sum: 7			
Members	-				
Advanced					
	Row	Column Cell			

Traceability matrix

The Traceability matrix *shows the relationships between elements:*



Note: This example is based on data that is not used in the Cars example.

Gantt

The Gantt mode is useful when the time dimension is important, such as when a set of release projects should be viewed:



Note: This example is based on data that is not used in the Cars example.

History

The History mode shows the history of an attribute; for example, how Choice attributes have changed over time. The following example shows how the Status attribute of a set of requirements have changed. You might use this information to make conclusions about the development process:

From	То	Number of Times Number	of Elements Ave	rage Time
***New	ab Draft	13	12	497
New	New	72	23	2776
**New	Approved	11	9	328
***New	Completed	3	3	270
**New	₿In Progress	6	6	60
**New	💋 Withdrawn	1	1	<1
***New	Reviewed	12	10	457
Draft	2 Withdrawn	1	1	329
Draft	Completed	1	1	145
≥Draft	""New	7	7	520
Draft	Approved	1	1	21
Draft	Reviewed	4	4	162
Reviewed	***New	14	12	2273
Reviewed	2Draft	1	1	2283
Reviewed	Approved	2	2	138
✓Approved	Completed	1	1	21
✓Approved	💋 Withdrawn	1	1	23
✓Approved	***New	14	10	1978
✓Approved	AIn Progress	2	2	509
🔅 In Progress	Reviewed	1	1	19
In Progress	***New	4	4	4633
😤 In Progress	Completed	3	3	523
Completed	Postponed	1	1	1612
Completed	***New	4	4	4190
Completed	Approved	3	3	73
Postponed	💋 Withdrawn	1	1	49
Postponed	HCHNew	1	1	3357
Ø Withdrawn	epostponed	1	1	338
🖉 Withdrawn	✓Approved	1	1	305
🖉 Withdrawn	**New	2	2	2137
Time is displayed in hou	rs.			
Гуре	Attribute Perspec	tive		
Number of Changes	Status Y Hours			

Note: This example is based on data that is not used in the Cars example.

What's New

The What's New mode can be used to spot changes that, for example, were made since you last logged out. In the following example, the What's New mode shows changes made to the Type attribute in the last 8 hours:

splay > All cars				Getti	ng Started	
} •		1 🔁 😪 🚫 🖬				
Modules	What's New in Al	cars?				
Display	Date	Member		Element	Attribute	Changed To
All cars	2009-11-18 13:40	Element added by Mil	kael Norbäck.	007:Car 7	ID	007
leports	2009-11-18 13:40	Element added by Mil		007:Car 7	Title	Car 7
Configure	2009-11-18 13:39	Element added by Mil		006:Car 6	ID	006
1embers	2009-11-18 13:39	Element added by Mil		006:Car 6	Title	Car 6
nformation	2009-11-18 13:39	Element added by Mil		005:Car 5	Title	Car 5
dvanced	2009-11-18 13:39	Element added by Mil		005:Car 5	ID	005
	2009-11-18 13:38	Element added by Mil		004:Car 4	Title	Car 4
	2009-11-18 13:38	Element added by Mil		004:Car 4	ID	004
	2009-11-18 13:38	Element added by Mil		003:Car 3	Title	Car 3
	2009-11-18 13:38	Element added by Mil		003:Car 3	ID	003
	2009-11-18 13:38	Element added by Mil	kael Norbäck.	002:Car 2	ID	002
	2009-11-18 13:38	Element added by Mil	kael Norbäck.	002:Car 2	Title	Car 2
	2009-11-18 13:37	Element added by Mil	kael Norbäck.	001:Car 1	Title	Car 1
	2009-11-18 13:37	Element added by Mil	kael Norbäck.	001:Car 1	ID	001
		nce 2009-11-11 14:34 Cf			187 I.	
	Time Scope		Member Scope			te Scope
	Last Week	~	All Members	~	All Att	ributes 💌 🛛 🛛 🕅

Creating criteria for prioritizing your elements

With Rational Focal Point, you can prioritize elements in a structured way. For example, many situations in product management or requirements management require that you make decisions based on your information. For instance, which features should go into the next release? What risks are most severe? What competitors constitute the largest threat?

While some attributes, such as Price and Type, are represented by facts, some attributes, such as design, are more relative. In this example, you create two criteria: Design and Price. Use these criteria to compare the cars.

To create the criteria:

- 1. Click Modules > Criteria, and click Add Criterion.
- 2. Enter a name and short description for the criterion. Make sure the Objective is set to **Maximize**, because this is a positive criterion.
- 3. In the **Question** field, type a question that illustrates this criterion; then click **OK**.

odules > Criteria		Getting Started
Criteria(1/0) Enter inform	nation about the new Criterion, then click OK.
	ID	***
Modules Elements	Title	Design appeal
* Criteria	Description	
H Releases	Description	🥸 💛 😂 🛯 B I 🛛 🔤 🧮 🖉 🌌
Checkpoints		This criterion represents the subjective appeal of the design of the
A Resource Types		car, in short, how good it looks.
Cars		The Control Control
Saved Plans		
Saved Charts		
Saved Reports		
Saved Baselines		
Display	Objective	1 Maximize
All cars		Maximize
Reports	1	
Configure	Туре	🗰 Public 💌
Members		
Information	Question	Which car looks better?
Advanced	Estimate	The attribute cannot be edited in this frame.
	Lounde	The database connot be concern this name.
	Element Inf	ormation
	Owner	Mikael Norbäck 💌 Lookup
	Creator	Mikael Norbäck
	Created Date	2009-11-18
	Last Changed By	Mikael Norbäck
	Last Changed Date	2009-11-18
	Dannak Faldan	
OK	Cancel	

4. Create a Price criterion. Because you know the price of each car, you can use those numbers. From the **Objective** list, select Minimize; then click **OK**.

A Rational Foca	al Point		Workspaces Home Preferences Mikael Norbäck Help Log O
Modules > Criteria			Getting Started
Modules	Criteria(1/1)	Enter inform	nation about the new Criterion, then click OK.
Elements		Title	Price
Criteria Releases Checkpoints		Description	Image: Second
₩ Saved Plans Saved Charts Saved Reports Saved Baselines			
Display		Objective	Minimize
Reports			
Configure		Туре	1107 Public M
Members			
Information		Question	
Advanced		Estimate	The attribute cannot be edited in this frame.
		Element Inf	
		Owner	Mikael Norbäck 💌 Lookup
		Creator	Mikael Norbäck
		Created Date	
		Last Changed By	Mikael Norbäck
	<	Last Changed Date	2009-11-18
		Danak Faldan	allow the second s
and the second se	OK Cancel	J	
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5. Set the link between the criterion and the Price attribute of the Cars elements by editing the Estimate attribute. Click the edit icon 2° next to Estimate.

دم Rational Foca	l Point		Workspaces Home Preferences Mikael Norbäck H	elp Log Out
Modules > Criteria			Getting Started	~
Image: Criteria Image: Criteria Image: Criteria Image: Criteria	🗝 🕇 001:Design appeal	Price ID Title Description Objective Type Question Estimate		
Saved Charts Saved Reports Saved Baselines Display Reports Configure Members Information	Saved Reports Saved Baselines olay orts figure bers ormation	Element Info Owner Creator Created Date Last Changed By Last Changed Date	ormation Mikael Norbäck Mikael Norbäck 2009-11-18 Mikael Norbäck 2009-11-18	
Advanced		Parent Folder	Criteria	0
IBM.			Ra	tional. software

6. Select Cars.

odules > Criteria			Getting Started	
.	Criteria(1/2)	Select the modu	le that contains the estimate attribute.	
Modules Elements	U 002:Price		Elements	A module where the members add and organize any kind of elements. When a new module is added to the workspace it is always of this type.
% Criteria		Criteria	The module where the members add and organize criteria. Criteria are used when members prioritize elements or criteria.	
Resource Types		Releases	The module where releases are stored. The releases are the prerequisites when release plans are generated by the release planner.	
		Saved Baselines	The module where baselines are stored.	
Saved Plans		Views	A module where the members add and organize any kind of elements. When a new module is added to the workspace it is always of this type.	
Saved Baselines		Checkpoint	Checkpoints	The module where the members add and organize checkpoints. Checkpoints are used when the members review elements.
Reports Configure		Resource Types	The module where resource types are stored. The resource types can be prerequisites when release plans are generated by the release planner.	
Members		Saved Charts	The module where saved charts are stored.	
Information		Saved Reports	A module where generated reports can be saved.	
Advanced		Members	Users in the database must be members of a workspace to be able to access the workspace. All members of the workspace are listed in this module. Members get access to the elements in the modules via views. Members that also are administrators also have access to the modules.	
		Saved Plans	The module where release plans are stored. A release plan contains the results of a member's work with the release planner.	
		Cars	This is my cars module.	
		The attribute value is		
	Cancel		t, pairwise comparisons determine the elements' priorities for value is set, the values of the selected attribute determine the	

7. Select the **Price** attribute (which is the only one available because there is only one integer attribute in the Car element):

Criteria(1/2)	Select Estimate Attribute for Price
004 Price	Price
	If this value is not set, pairwise comparisons determine the elements' priorities for this criterion. If this value is set, the values of the selected attribute determine the priorities. The attribute must be in the same module as the elements.

8. In the view that you defined, specify that all cars should be available for prioritization and visualization. Click **Configure > Views > All Cars**.

at Rational Foca	al Point		Workspaces Home Preferences Mikael Norbäck H	lelp Log (Out
Configure > Views			Getting Started		~
₽.	Views(1/1) 001:All cars	All cars		8 Q /	^
Modules		ID	001		
Display		Title	All cars		
Reports		Description	This view shows all elements in the Cars module.		
Configure		Mandatory A	Attributes		
☐ Workspace Modules Attributes ↓ Views		View Definition	All elements in the Cars module whose type is a folder is false Visible attributes:	0	
ি Notifications ⓓ Integrations র∃ Alias +⊡• Workflows			• ID • Title • Type • Price • Element Information • Owner		
Members			 Last Changed Date 		
Information			• Parent Folder		
Advanced			Editable attributes: • Title • Type • Price • Parent Folder		
		Display	Yes	0	
		Add	No	0	
		Review	No	0	
		Prioritize	No	0	
		Visualize	No	0	
		Plan	No	0	
		Criteria	All criteria	0	
		Baseline	No	0	
		Access Info	mation		~
	Add View Add Folder	Turn Into Fo	Ider Delete Display View Share View D	elete From	My
IBM.			Ra	tional. soft	ware

9. Set the Prioritize and Visualize attributes to Yes by clicking their edit icons and selecting the check box:

Prioritize	Yes	Ø
Visualize	✓ Include this view in the Visualize menu. □ ■	
	Lets the users visualize prioritization results and estimates in charts.	

The Prioritize and Visualize menus are displayed in the navigation bar, and the All cars view is available.

By default, the criteria attribute is set to "All criteria," so in this case, you do not need to edit that attribute because you have only two criteria in the criteria module. In a different situation, you might have many criteria for all sorts of element types. In that case, you can select what specific criteria are relevant by defining a view of the relevant criteria and linking this attribute to the view.

Prioritizing your elements

You can use the decision support features in Rational Focal Point to consider several elements according to several criteria at the same time. You can focus on two alternatives according to one criterion at a time, and then combine the simple choices to present the larger and more complex situation.

To prioritize your elements:

1. Open the Prioritization view of All cars by clicking **Prioritize > All cars**:



Note a few things in this view. First, you are presented with a question that is based on the criteria you are currently considering. Your task is to consider two elements (in this case, Car 6 and Car 1) and indicate which one looks better by marking the scale. If you think Car 6 looks better, place the mark to the left, and vice versa.

There are no units, and the scale is not absolute. Placing your mark to the extreme left does not mean that Car 6 looks twice or three times as good as Car 1. The scale is relative.

2. Do the pairwise comparisons for the Design appeal criterion by selecting buttons on the scale and clicking **OK**. After you make13 comparisons, a message stating that you can now visualize the result is displayed.

Visualizing your results

You can use visuals to support your decisions. Priorities are represented as bars, bubbles, and lines, with size and length relative to their priority.

To visualize priorities in a bar chart:

1. Click **Visualize > All Cars**. Make sure that the bar chart mode is selected.



The bar chart shows one criterion. In the chart, Car 6 is better looking than Car 4. The best cars according to a criterion are indicated by a green check box. The scale shows relative design appeal in percentages, and the lengths of all bars sum up to 100%.

You can choose from several visualizations, and there are no guidelines about what visualization techniques to use in what situations. For instance, in this example, you might also use the stacked bar chart.

2. To see the stacked bar chart, click the \blacksquare button.



In the stacked bar chart, you can see more than one criterion at a time. In the figure above, you can see that when you consider both cost and design, the relative rank is different. Considering both criteria, the bar at the top is best and the one at the bottom is worst.

You might have many more criteria, such as Versatility, Environmental friendliness, Safety, Build quality, and so on. Or, you might have more stakeholders that should be represented. All these criteria can be shown at the same time in the stacked bar chart.

3. Analyze the chart: Select and clear some of the check boxes and see how the value indicators in the top right corner are affected. As you select and clear the cars, the value indicators reflect that you do not get all of the relative value (design) and the relative cost.

In this example, the value indicators make little sense, but in other situations, the indicators are useful. For example, if you were considering a set of features to implement in a software product, you could use the indicators to see what features to consider in order to get 60% of the value for 30% of the cost.

4. Consider what happens if the Price criterion is more important than the Design criterion. In the right frame, right-click and select **Criteria Scenarios**:



The Criteria Scenarios window opens, in which you can try different scenarios. For example, what if cost is twice as important as design?

5. Drag the Price slider to the right until the value is 80%.



6. The black triangles 📮 indicate the rank of the elements. To refresh the order of the elements in the stacked bar chart, click 上 .



If you consider Price to be much more important than design, Car 6 is the best. This is indicated because the black triangles on the Car 6 bar are the most to the right. Car 3 turns out to give the least design for the money. In other situations, you might consider other issues, for example:

- What if I need to cut the budget—how would that affect my planning?
- How robust is my risk analysis?

You can experiment with these criteria to see the effects of such scenarios.

If you close the Criteria Scenarios window, the relative weight of the criteria is fixed. You can change the weight of criteria by opening the Criteria Scenarios window.

Printing a report

Rational Focal Point has a customizable built-in report generator. To create a quick report:

1. Click **Display > All cars**, and click the button. A window opens in which you can enter basic administrative information:

Select report format.	
Format	RTF (Rich Text Format)
Paper Size	A4 🔽
Orientation	Portrait 💌
Use header, footer and font from template (TPE templates are currently not available in quic	k reports).

Click Next.

Hea	der		
	Header		
	Table Cell	Prepared by	
E	Table Cell	Document number	
	Table Cell	Approved by	
8	Table Cell	Checked	
	Table Cell	Reference	
	Table Cell	Date	

Click Generate Report and follow the instructions.



Summary and next steps

In this guide, you have learned how to create a module (Cars), add information (attributes) about its elements (the cars), display the information in various ways, prioritize the cars according to a couple of criteria (design and cost), analyze scenarios about the cars, and print a report. These tasks are some of the most basic tasks that you can do with Rational Focal Point. You can also use the product for these purposes:

Filtering, which you can use to filter relevant information. While views define what the user is allowed to see, users can define filters to select a subset of a view.

Linking information together. Information elements are almost always linked to other elements: products to customers to releases to markets to requirements, and so on. With Rational Focal Point, you can link information and display relationships.

Business rules, which you can use for almost unlimited data manipulation; for example, creating workflows, doing quality control, and notifying members by email about certain events

Role-based access, so that product managers, developers, customers, and others can add, change, prioritize, and display the information that is relevant to them

Release planning, by which you can select sets of requirements and link them to release projects

Review support for information. For example, requirements can undergo a review process within an organization to secure clarity, understanding, and quality.

Versioning and baselining, by which changes to information elements can be tracked (and rolled back, if necessary) down to the attribute level

You are now ready to explore all the features of Rational Focal Point. As you explore, use the help system by clicking the Help link in the top right corner.

More information

Contacting IBM Rational Software Support

If the self-help resources have not provided a resolution to your problem, you can contact IBM® Rational® Software Support for assistance in resolving product issues.

Note If you are a heritage Telelogic customer, a single reference site for all support resources is located at <u>http://www.ibm.com/software/rational/support/telelogic/</u>

Prerequisites

To submit your problem to IBM Rational Software Support, you must have an active Passport Advantage® software maintenance agreement. Passport Advantage is the IBM comprehensive software licensing and software maintenance (product upgrades and technical support) offering. You can enroll online in Passport Advantage from http://www.ibm.com/software/lotus/passportadvantage/howtoenroll.html

- To learn more about Passport Advantage, visit the Passport Advantage FAQs at http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.http://www.ibm.com/software/lotus/passportadvantage/brochures_faqs_quickguides.httpl
- For further assistance, contact your IBM representative.
- To submit your problem online (from the IBM Web site) to IBM Rational Software Support, you must additionally:
- Be a registered user on the IBM Rational Software Support Web site. For details about registering, go to <u>http://www.ibm.com/software/support/.</u>
- Be listed as an authorized caller in the service request tool.

Submitting problems

To submit your problem to IBM Rational Software Support:

1. Determine the business impact of your problem. When you report a problem to IBM, you are asked to supply a severity level. Therefore, you need to understand and assess the business impact of the problem that you are reporting.

Use the following table to determine the severity level:

Severity 1	Description The problem has a <i>critical</i> business impact: You are unable to use the program, resulting in a critical impact on operations. This condition requires an immediate solution.
2	This problem has a <i>significant</i> business impact: The program is usable, but it is severely limited.
3	The problem has <i>some</i> business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has <i>minimal</i> business impact: The problem causes little impact on operations or a reasonable circumvention to the problem was

implemented.

- 2. Describe your problem and gather background information, When describing a problem to IBM, be as specific as possible. Include all relevant background information so that IBM Rational Software Support specialists can help you solve the problem efficiently. To save time, know the answers to these questions:
 - What software versions were you running when the problem occurred?

To determine the exact product name and version, use the option applicable to you:

- 1. Start the IBM Installation Manager and select **File** > **View Installed Packages**. Expand a package group and select a package to see the package name and version number.
- 2. Start your product, and click **Help** > **About** to see the offering name and version number.
- What is your operating system and version number (including any service packs or patches)?
- Do you have logs, traces, and messages that are related to the problem symptoms?
- Can you recreate the problem? If so, what steps do you perform to recreate the problem?
- Did you make any changes to the system? For example, did you make changes to the hardware, operating system, networking software, or other system components?
- Are you currently using a workaround for the problem? If so, be prepared to describe the workaround when you report the problem.
- 3. Submit your problem to IBM Rational Software Support. You can submit your problem to IBM Rational Software Support in the following ways:
 - **Online:** Go to the IBM Rational Software Support Web site at <u>https://www.ibm.com/software/rational/support/</u> and in the Rational support task navigator, click Open Service Request. Select the electronic problem reporting tool, and open a Problem Management Record (PMR), describing the problem accurately in your own words.

For more information about opening a service request, go to <u>http://www.ibm.com/software/support/help.html</u>

You can also open an online service request using the IBM Support Assistant. For more information, go to <u>http://www.ibm.com/software/support/isa/faq.html</u>.

- **By phone:** For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at <u>http://www.ibm.com/planetwide/</u> and click the name of your country or geographic region.
- **Through your IBM Representative**: If you cannot access IBM Rational Software Support online or by phone, contact your IBM Representative. If necessary, your IBM Representative can open a service request for you. You can find complete contact information for each country at http://www.ibm.com/planetwide/.

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