Rational. Focal Point
Release 6.4

IBM

Getting started with IBM Rational Focal Point

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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.

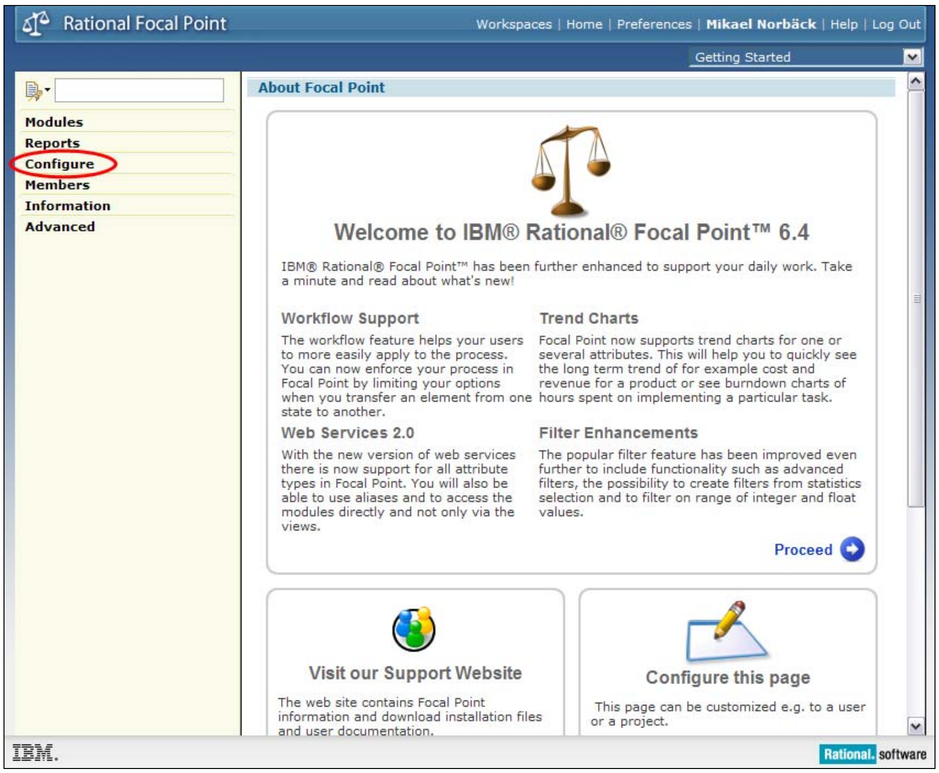
The screenshots in this guide are based on Rational Focal Point version 6.4.1.

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.

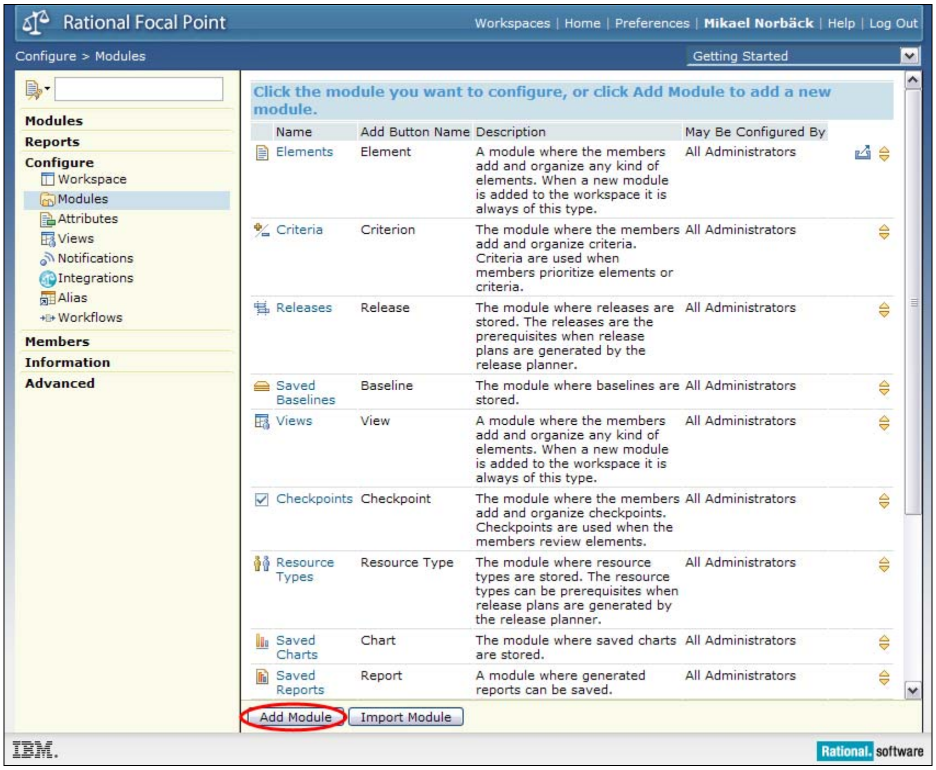
To create a module:

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

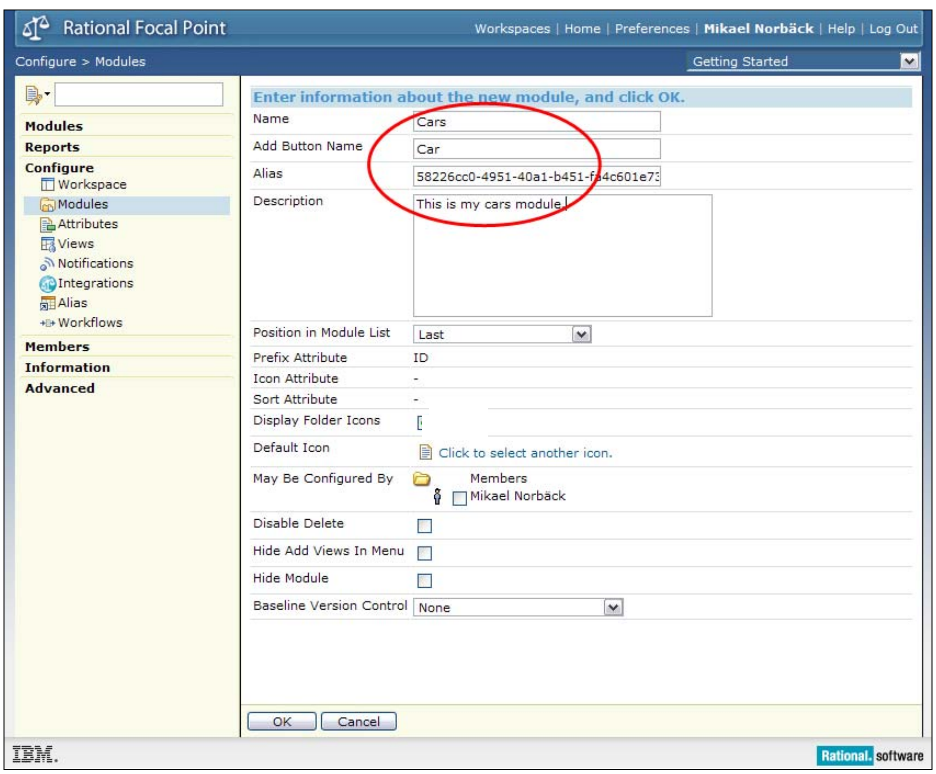


A list of all of the available modules is displayed. (You might have other modules in your list than those shown in the image.)

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



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.



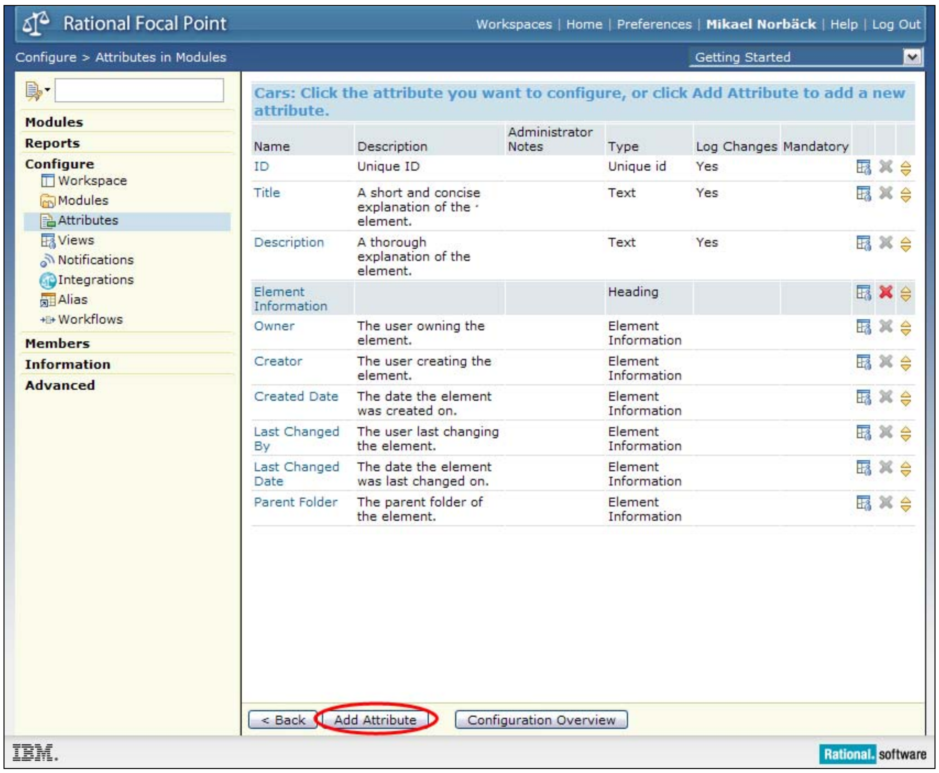
4. Click **OK**. A window opens and displays a message about defining the attributes for the module. Click **OK**.

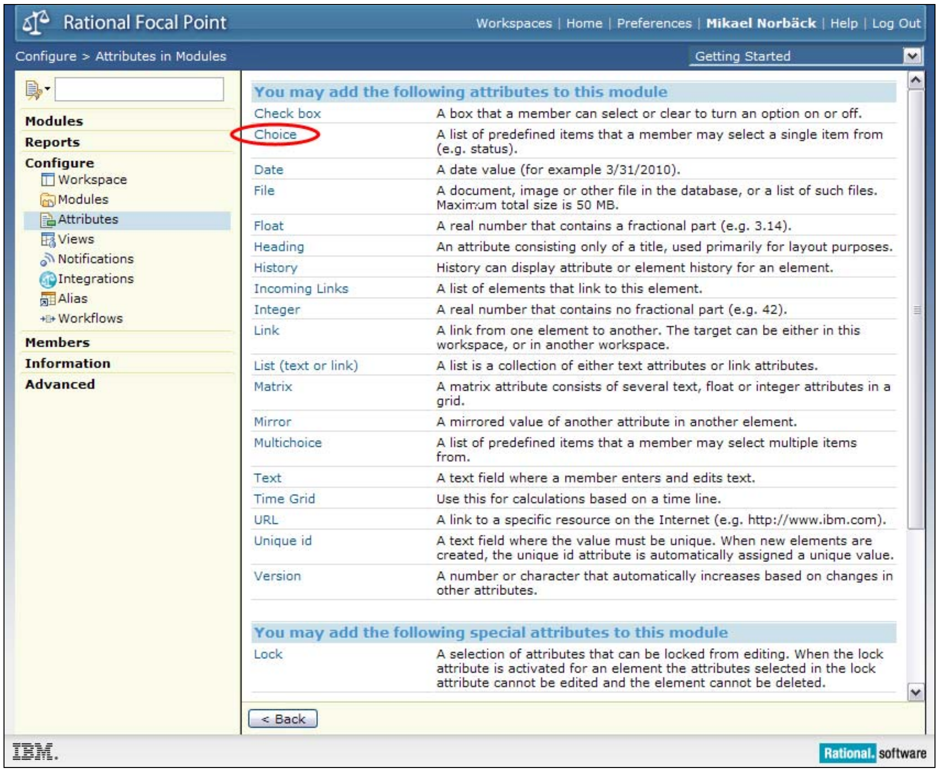
Adding attributes that describe the elements

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.

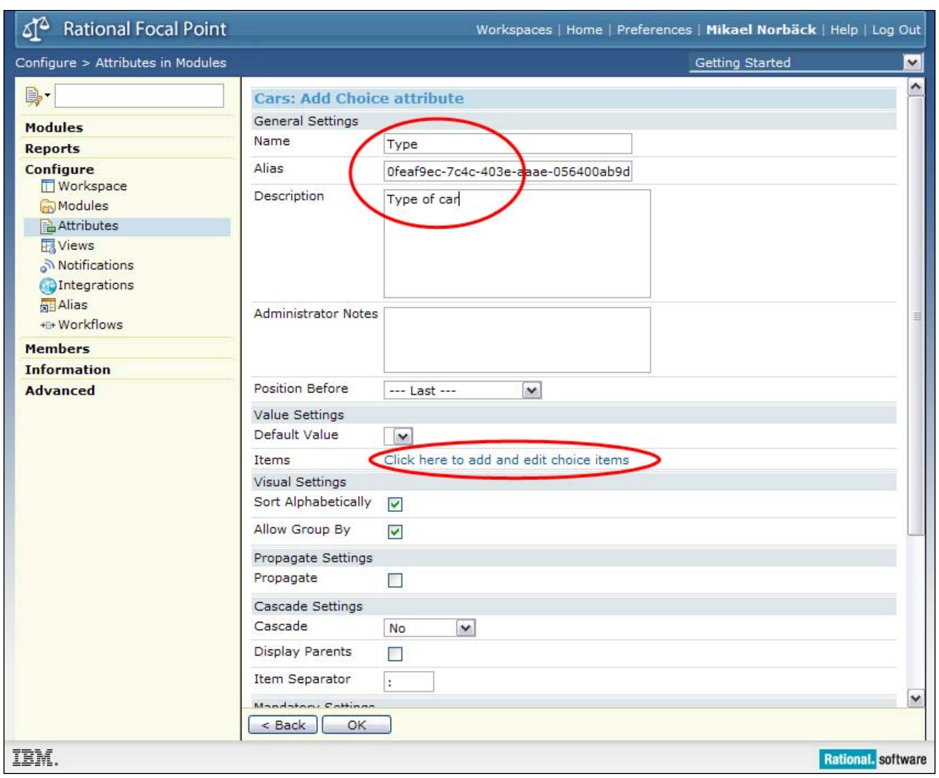
To add attributes:

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**.

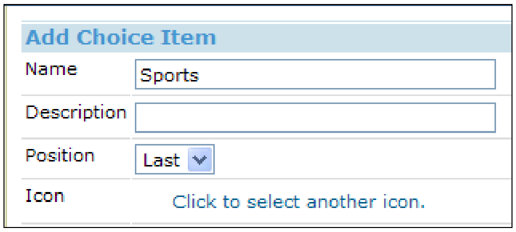




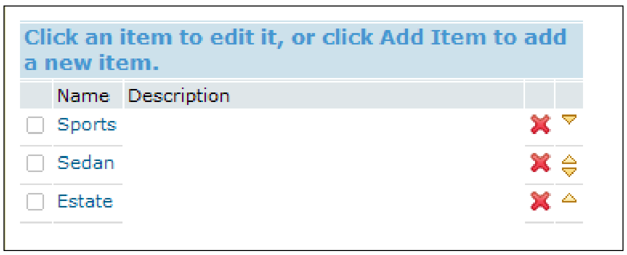
2. Edit the name and the description of the attribute, and then add choice items by clicking the link next to Items.



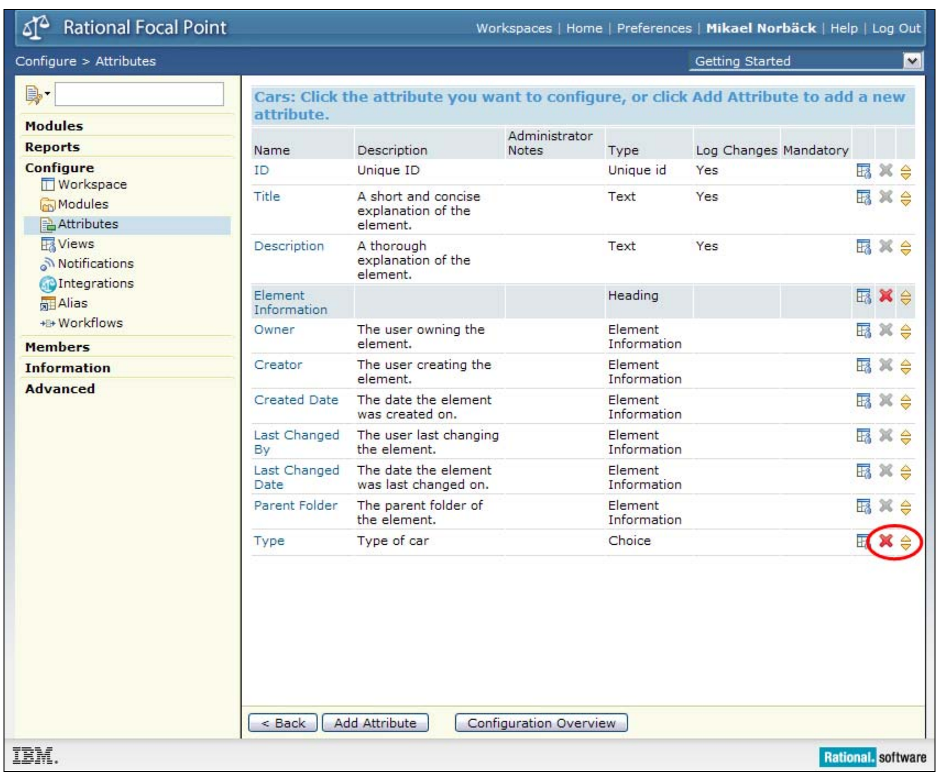
3. Add three items: Sports, Sedan, and Estate.



Your list should look as follows:

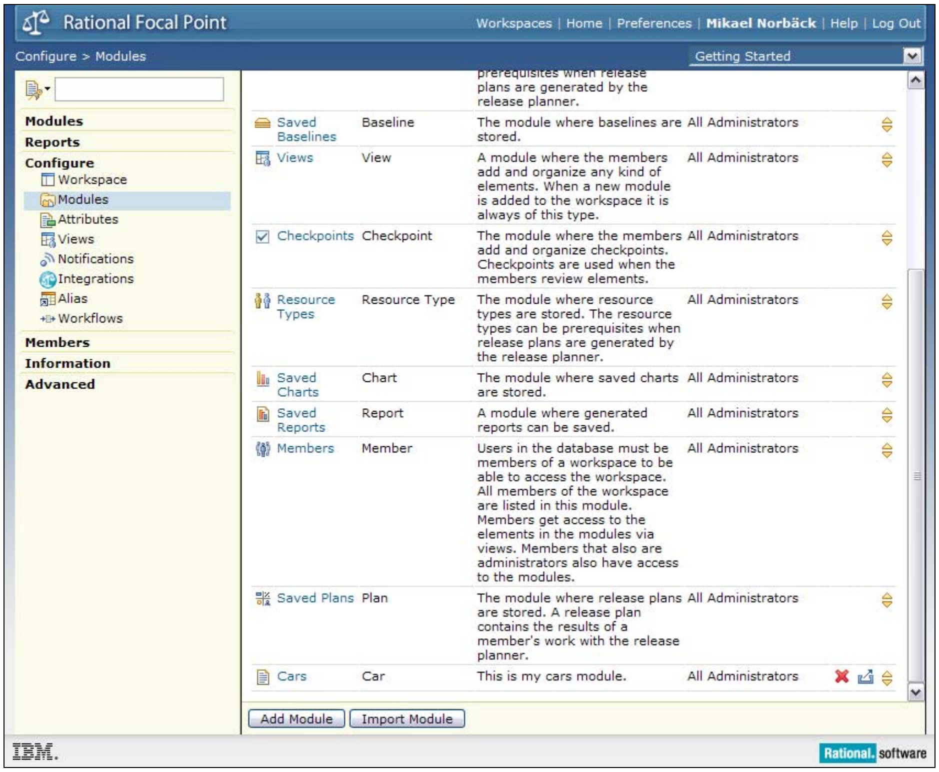


4. Return to the list of attributes by clicking **OK** twice. Note that the Type attribute is last in the list. You can move the attribute by clicking the arrows in the list. Move the Type attribute above Element Information.

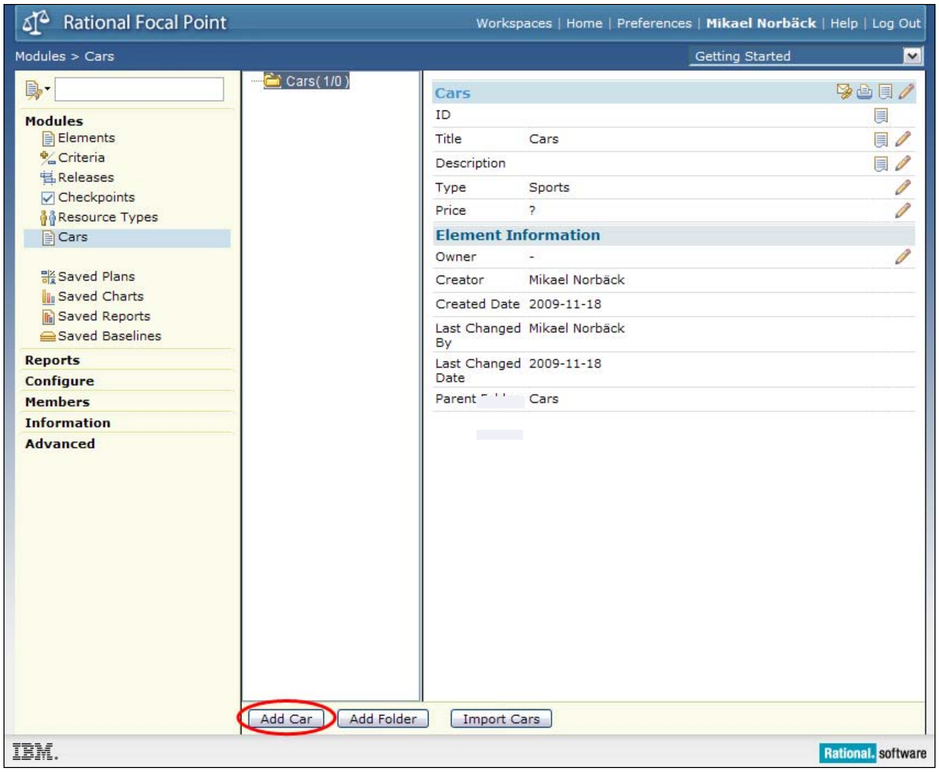


5. Add the Price attribute. This is a typical integer. Click **Add attribute** and select **Integer**. In the **Name** field, type `Price`, and in the **Description** field, type `The price of the car`. Move the Price attribute above Element Information.

   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.



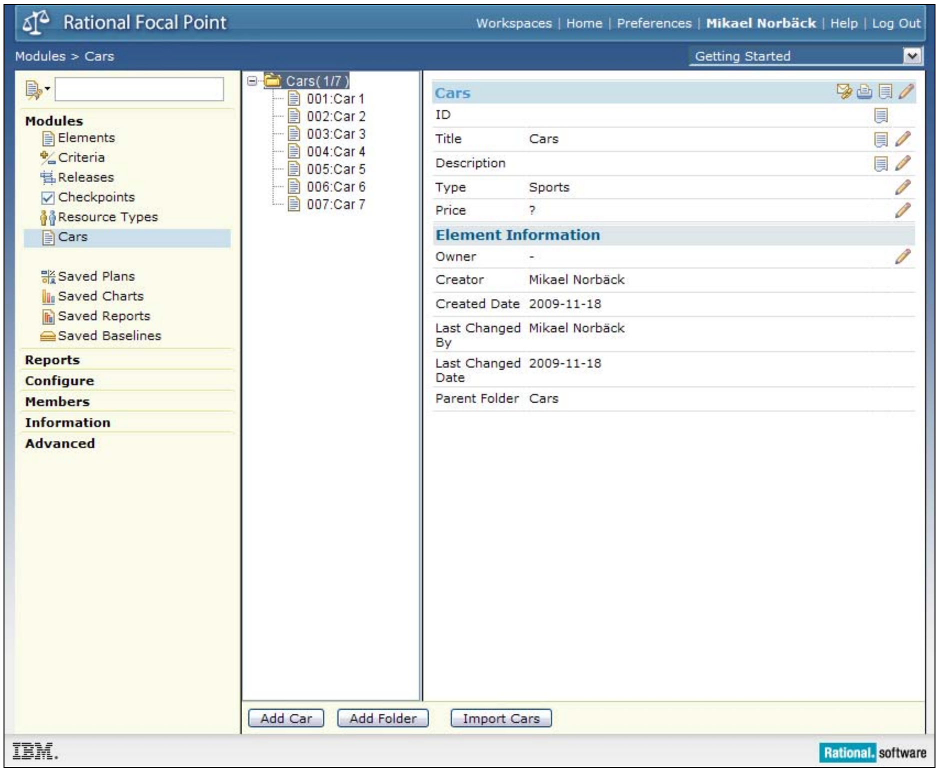
Adding elements

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

Title (make)	Type	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**.

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



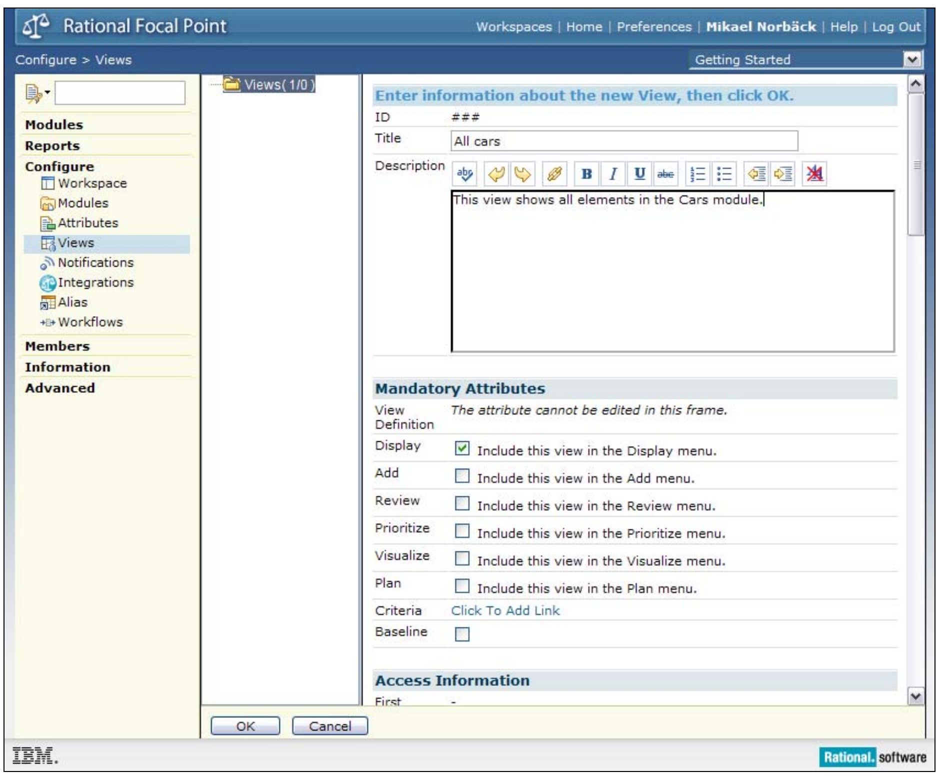
Creating a view of the elements

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.

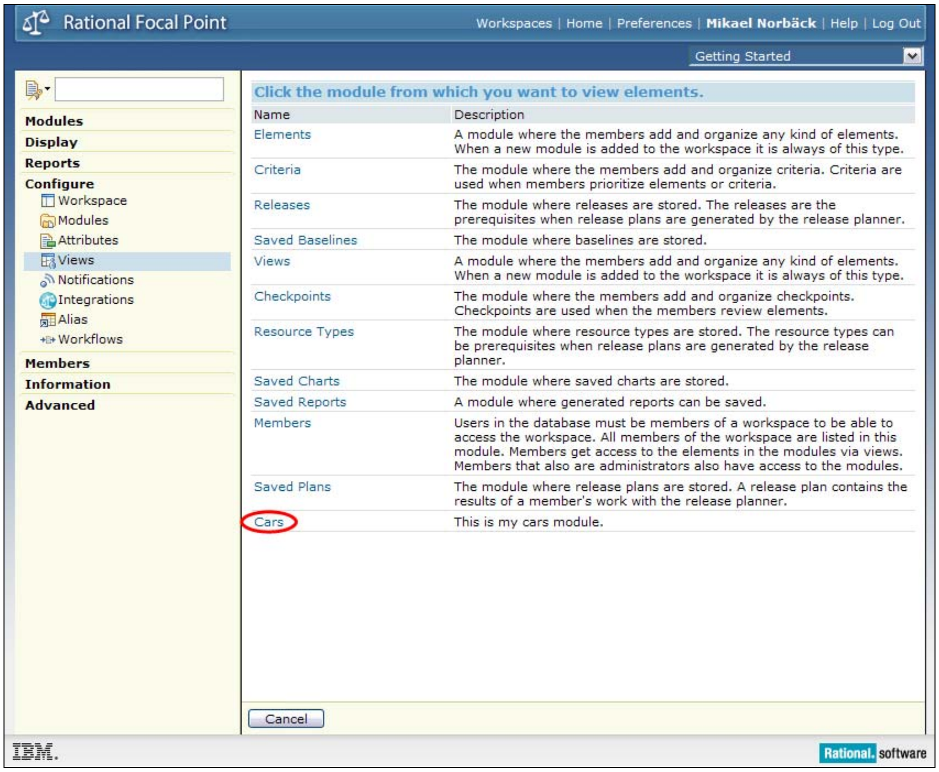
You can define views that show many subsets of your information; for example, only Estate cars, only cars that cost less than 20,000, or only those that a specific user created after a specific date.

To create a view that shows all of the elements:

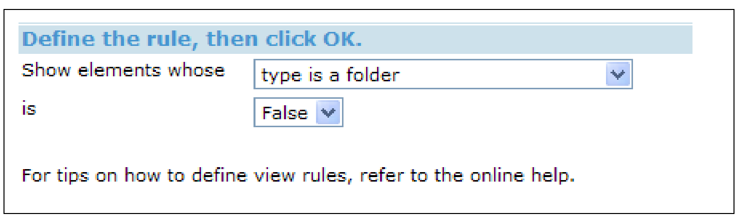
1. Click **Configure** > **Views**, and then click the **Add View** button. In the **Title** field, enter `All cars`; in the **Description** field, enter `This view shows all elements in the Cars module`.



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:

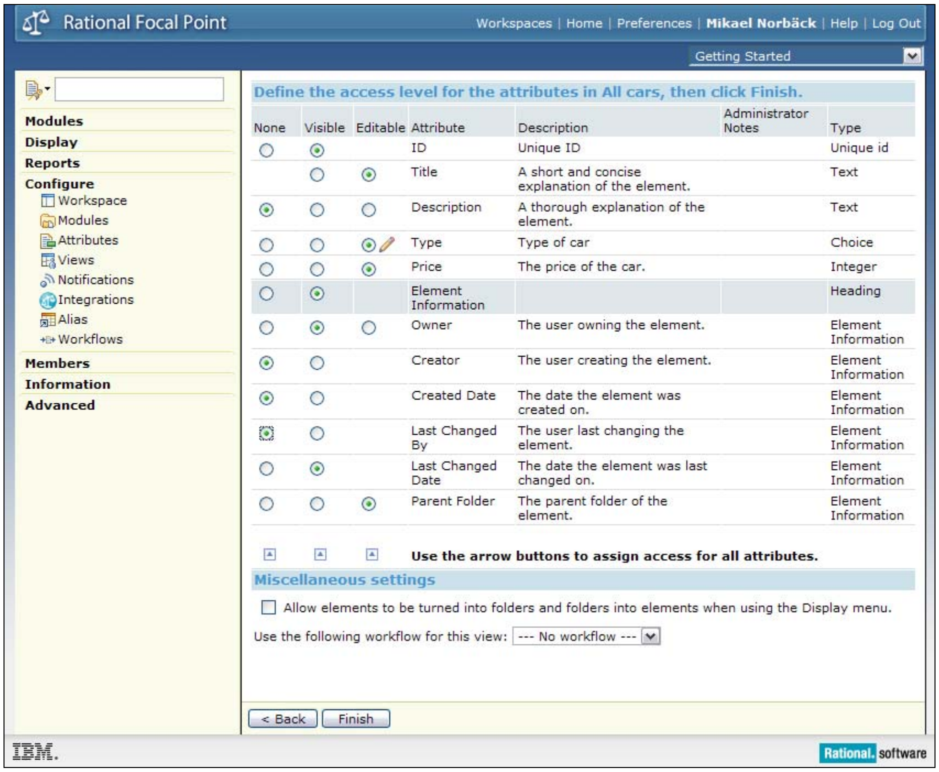


3. In the list of Modules on the left, click **Cars**. A wizard opens to guide you through a series of steps. The first in this series is a general selection rule:



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:



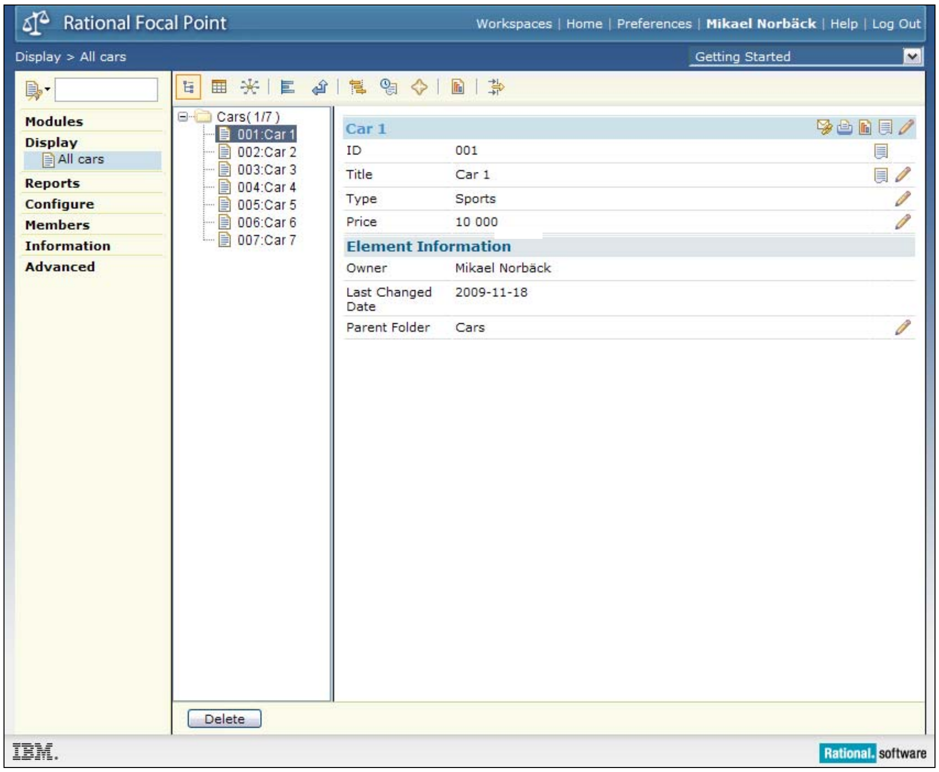
Because you do not need to use all of the administrative attributes, hide the attributes that you do not want to use. For each attribute, select either **None**, **Visible**, or **Editable**, as shown in the above image.

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.

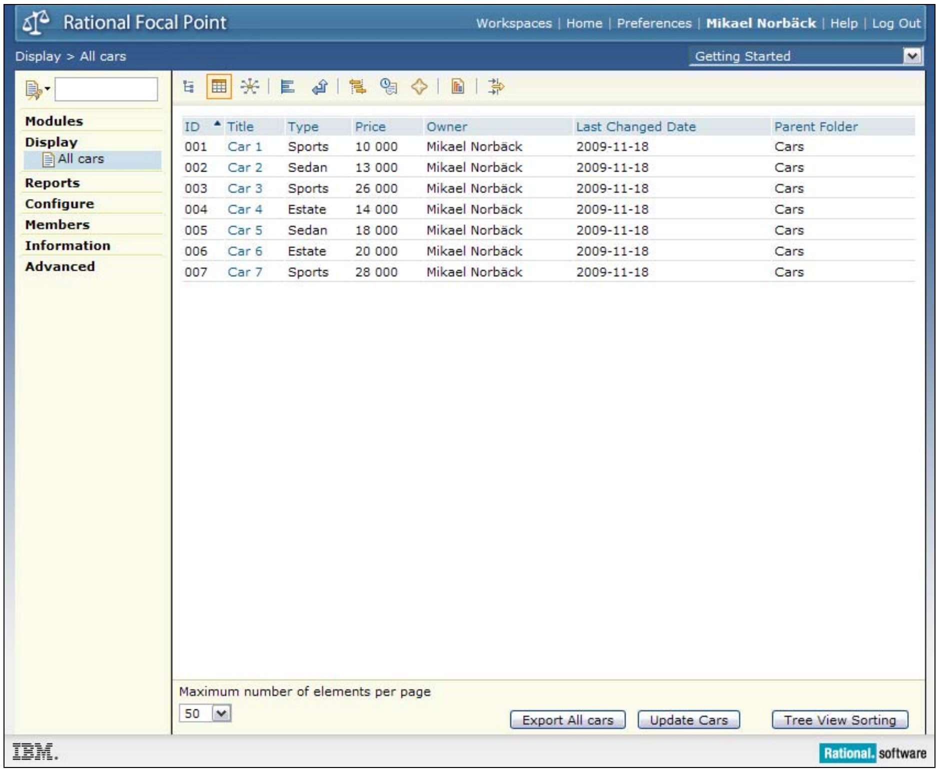


You can use these display modes:

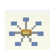
From left to right, the modes are **Tree**, **Table**, **Relational graph**, **Attribute statistics**, **Traceability Matrix**, **Gantt**, **History**, and **What's New.** Not all of these modes are used in the Cars example.

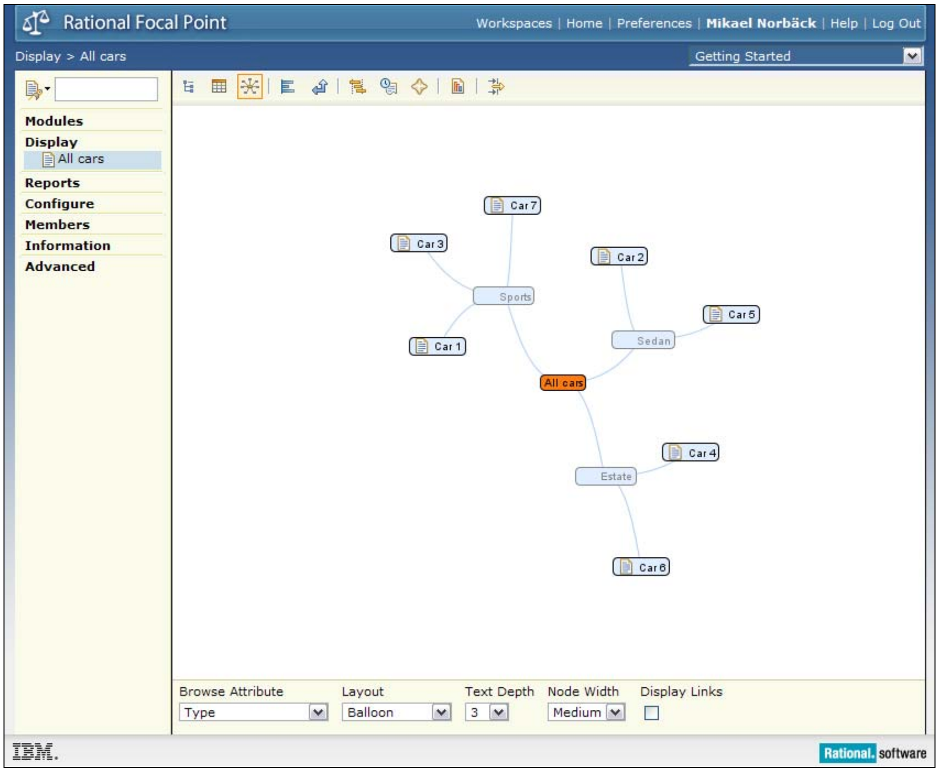
Table

In Table mode , 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**.



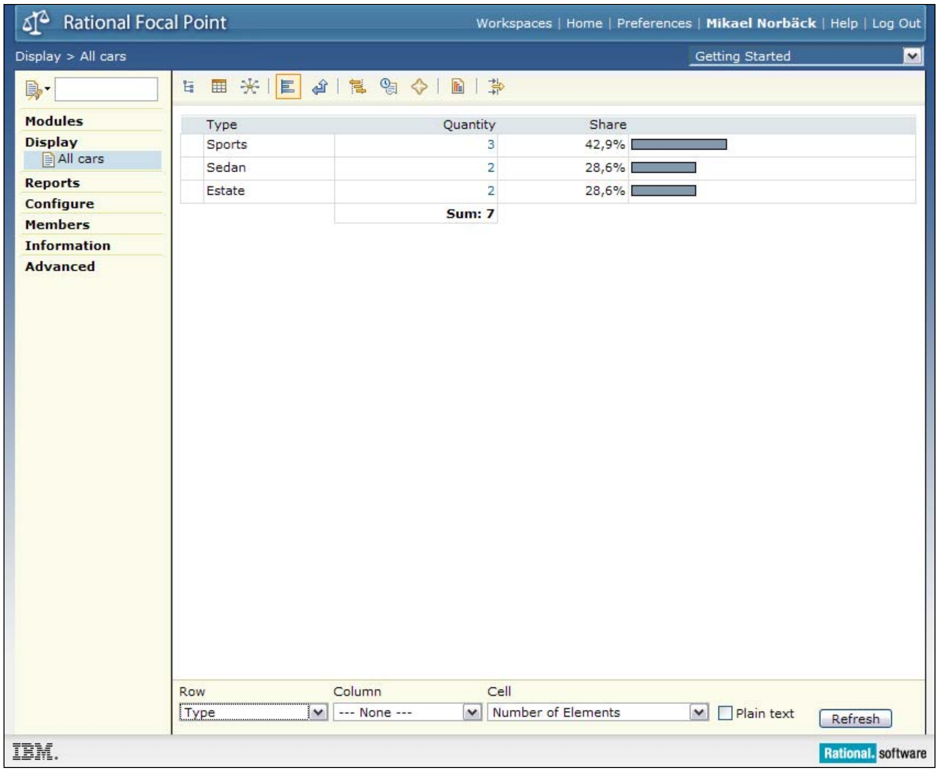
Relational graph

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:



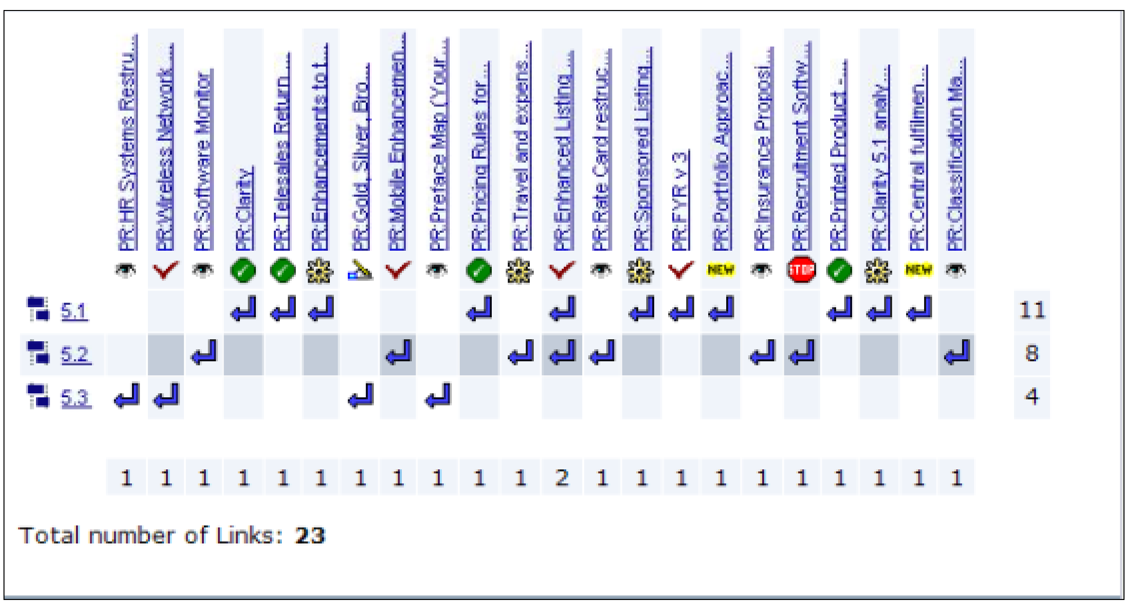
Attribute statistics

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.



Traceability matrix

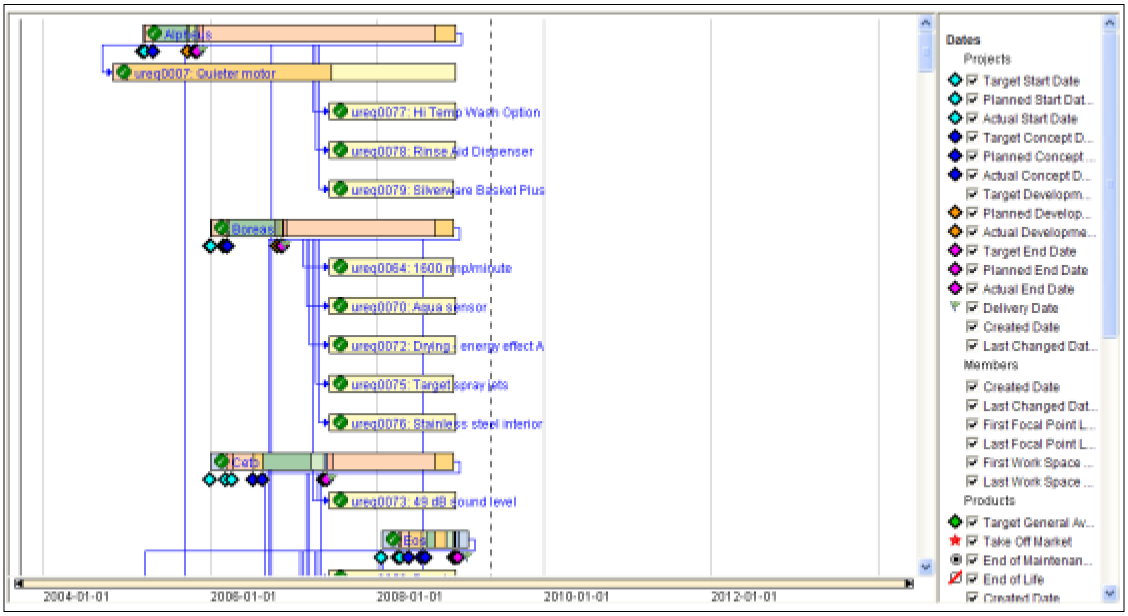
The Traceability matrix  shows the relationships between elements:



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	To	Number of Times	Number of Elements	Average Time
New	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	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	Draft	1	1	2283
Reviewed	Approved	2	2	138
Approved	Completed	1	1	21
Approved	Withdrawn	1	1	23
Approved	New	14	10	1978
Approved	In 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	New	1	1	3357
Withdrawn	Postponed	1	1	338
Withdrawn	Approved	1	1	305
Withdrawn	New	2	2	2137

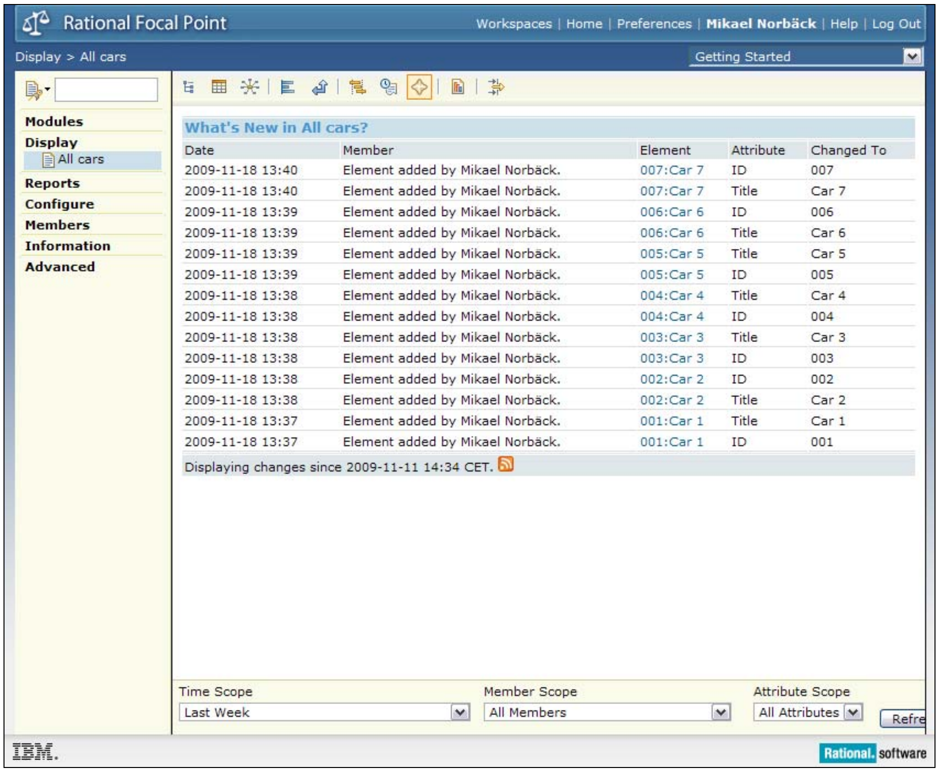
Time is displayed in hours.

Type	Attribute	Perspective
Number of Changes	Status	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:



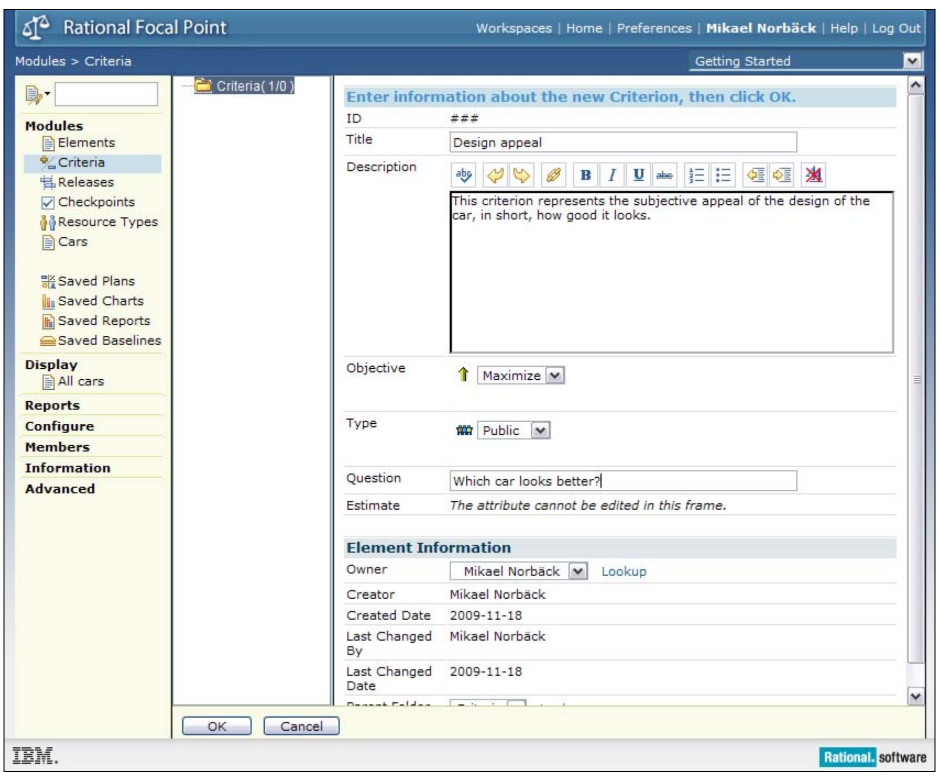
Creating criteria for prioritizing your elements

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?

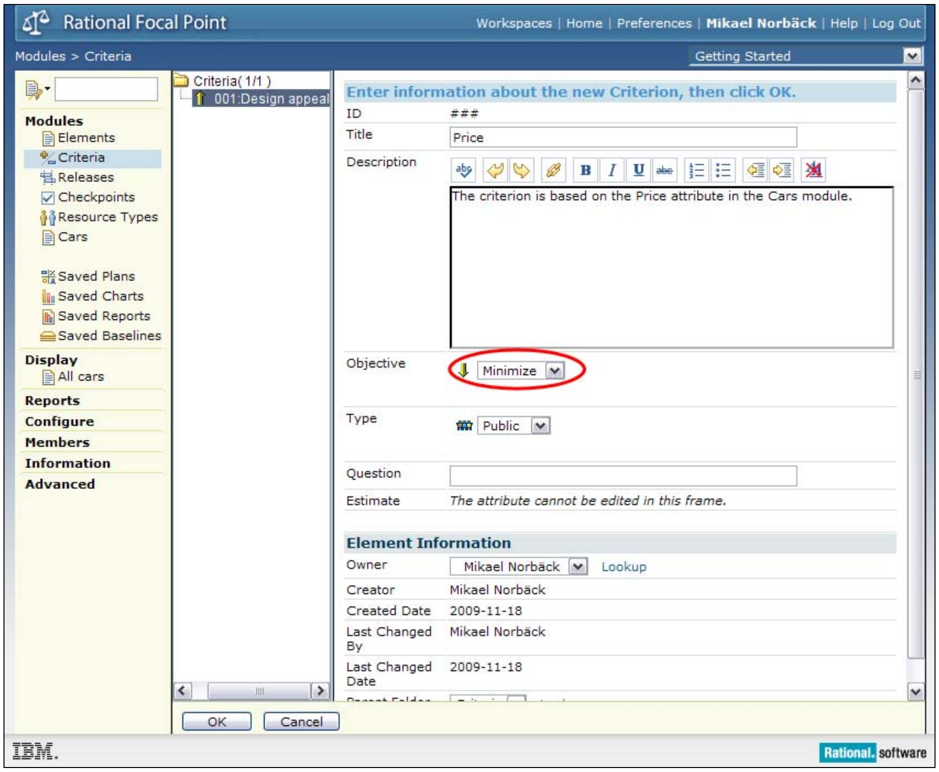
While some attributes, such as Price and Type, are represented by facts, some attributes, such as design, are more relative. In this example, you create two criteria: Design and Price. Use these criteria to compare the cars.

To create the criteria:

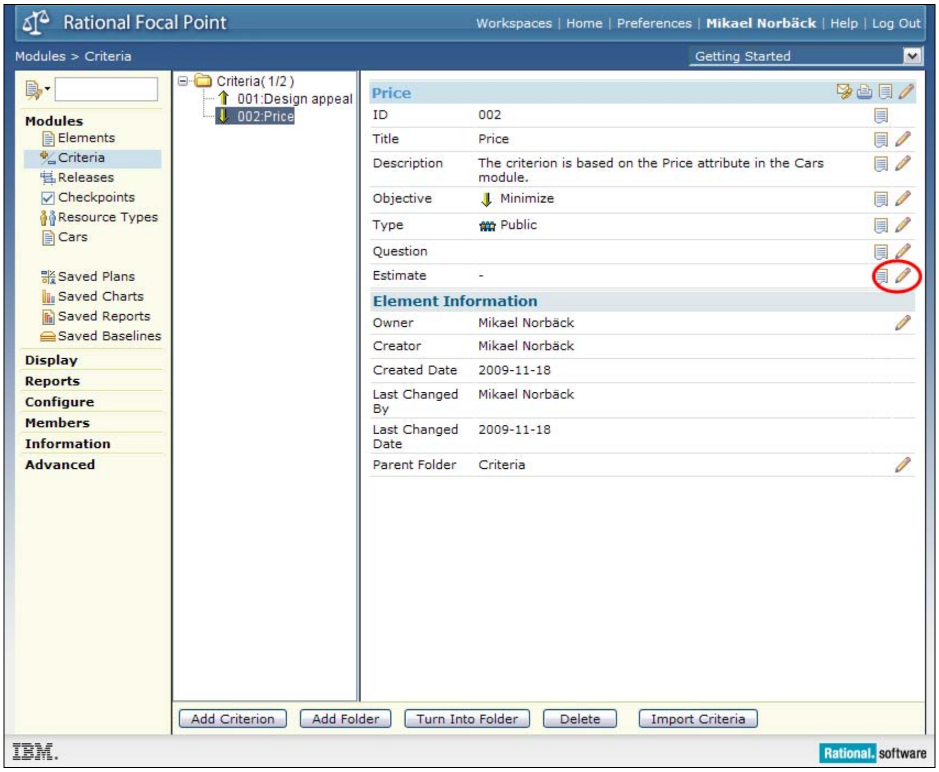
1. Click **Modules > Criteria**, and click **Add Criterion**.
2. Enter a name and short description for the criterion. Make sure the Objective is set to **Maximize**, because this is a positive criterion.
3. In the **Question** field, type a question that illustrates this criterion; then click **OK**.



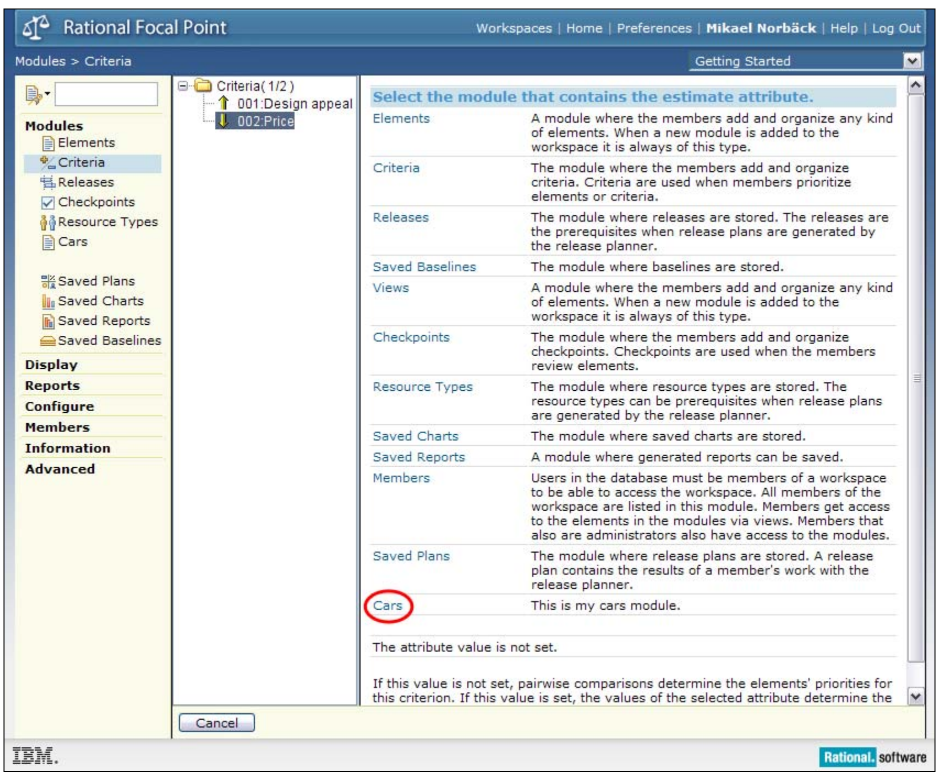
4. Create a Price criterion. Because you know the price of each car, you can use those numbers. From the **Objective** list, select Minimize; then click **OK**.



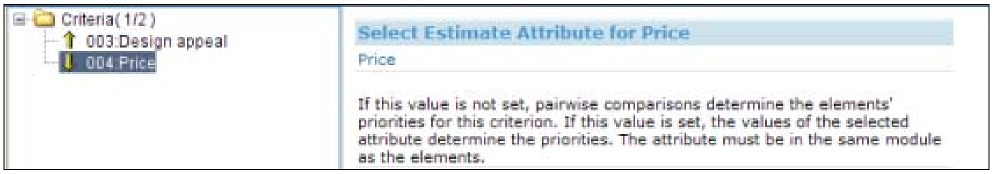
5. Set the link between the criterion and the Price attribute of the Cars elements by editing the Estimate attribute. Click the edit icon next to Estimate.



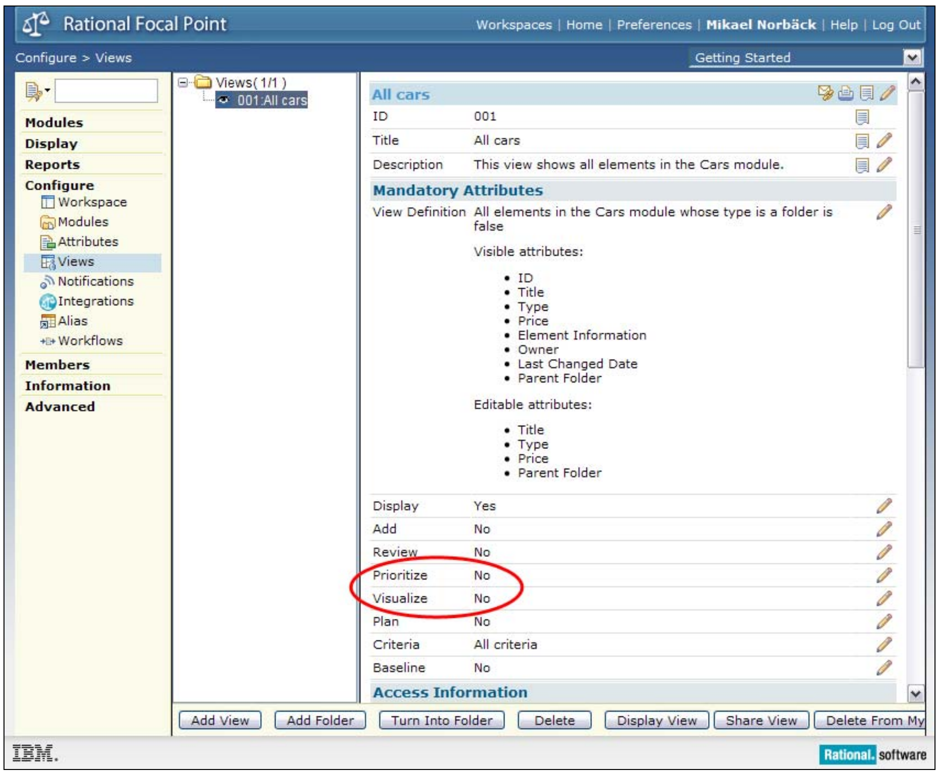
6. Select **Cars**.



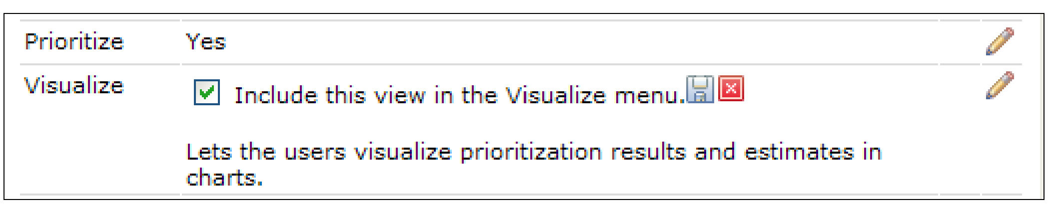
7. Select the **Price** attribute (which is the only one available because there is only one integer attribute in the Car element):



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



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



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

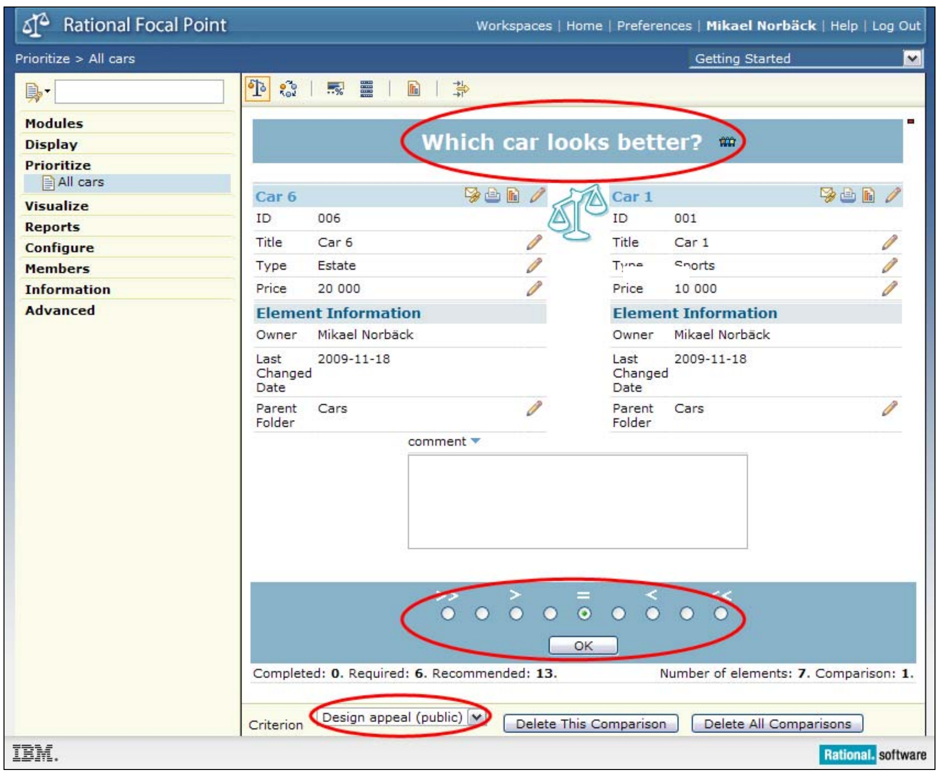
By default, the criteria attribute is set to "All criteria," so in this case, you do not need to edit that attribute because you have only two criteria in the criteria module. In a different situation, you might have many criteria for all sorts of element types. In that case, you can select what specific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

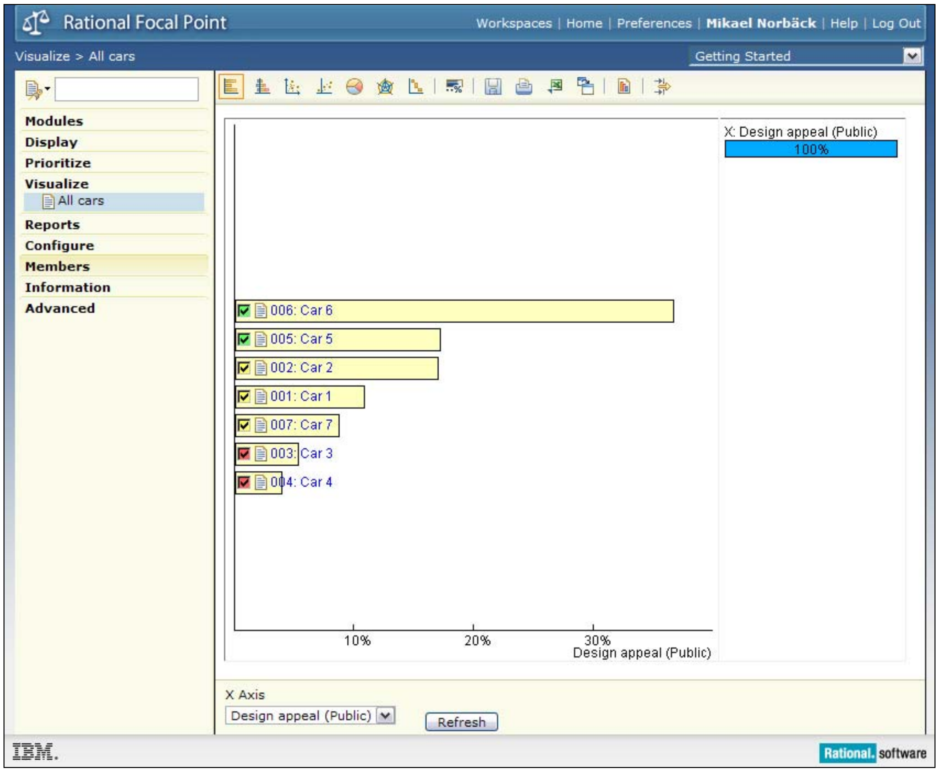
2. Do the pairwise comparisons for the Design appeal criterion by selecting buttons on the scale and clicking **OK**. After you make13 comparisons, a message stating that you can now visualize the result is displayed.

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.

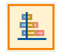
To visualize priorities in a bar chart:

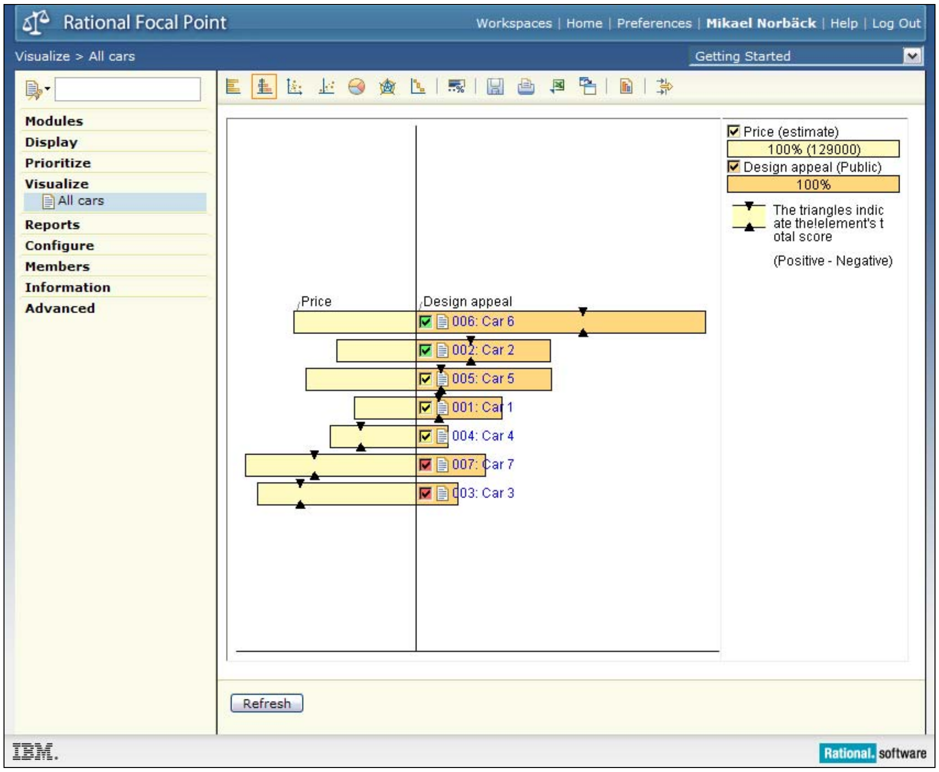
1. Click **Visualize** > **All Cars**. Make sure that the bar chart mode  is selected.



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  button.



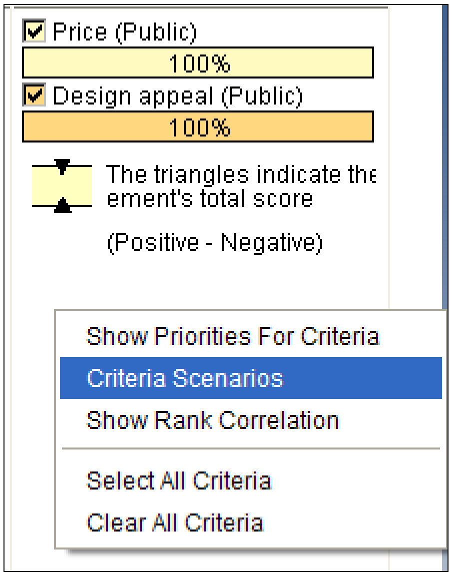
In the stacked bar chart, you can see more than one criterion at a time. In the figure above, you can see that when you consider both cost and design, the relative rank is different. Considering both criteria, the bar at the top is best and the one at the bottom is worst.

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.

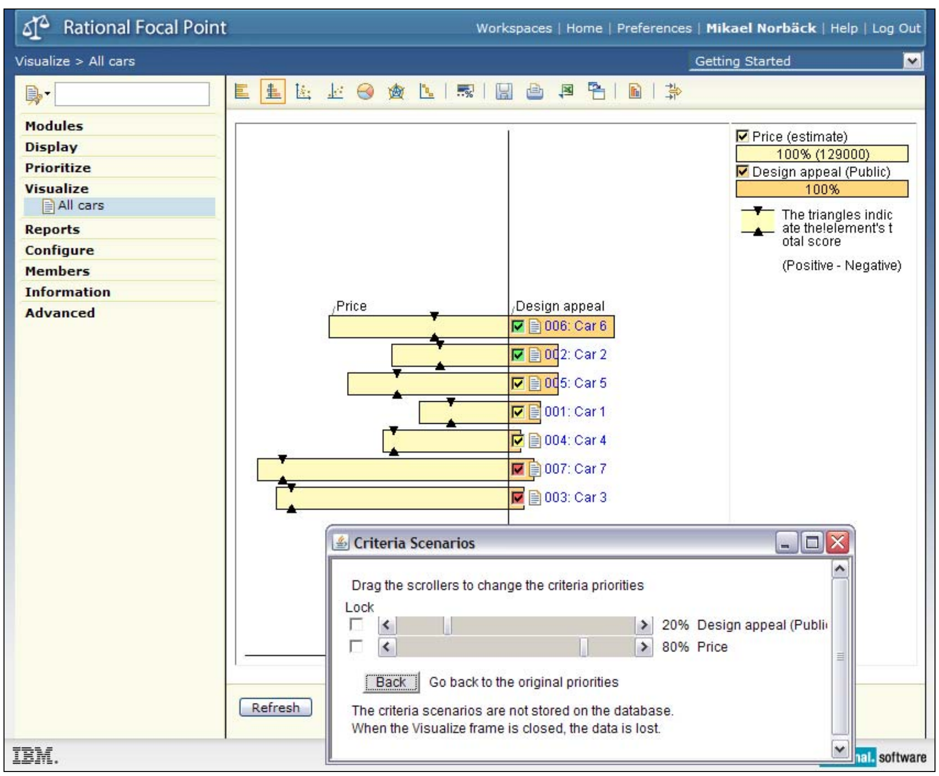
   In this example, the value indicators make little sense, but in other situations, the indicators are useful. For example, if you were considering a set of features to implement in a software product, you could use the indicators to see what features to consider in order to get 60% of the value for 30%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

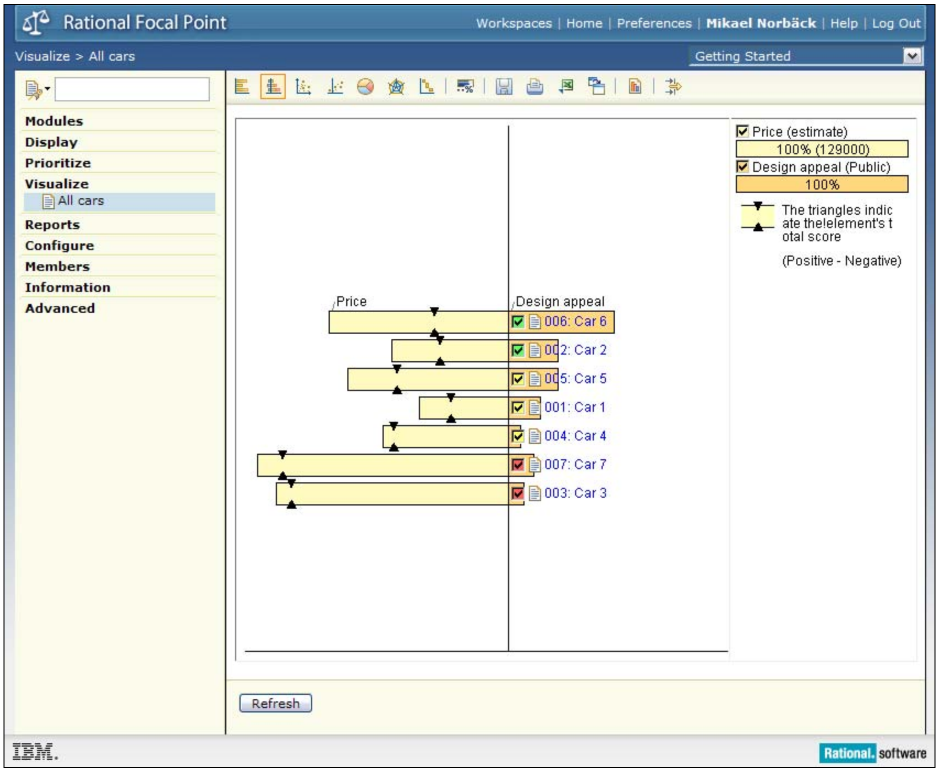


The Criteria Scenarios window opens, in which you can try different scenarios. For example, what if cost is twice as important as design?

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  .



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?

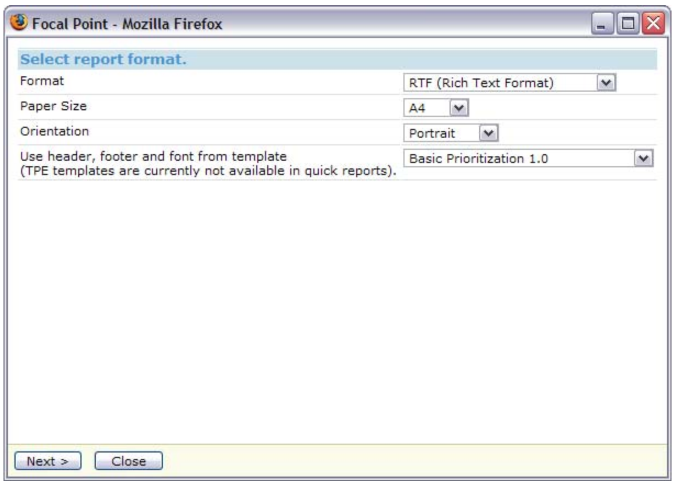
You can experiment with these criteria to see the effects of such scenarios.

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.

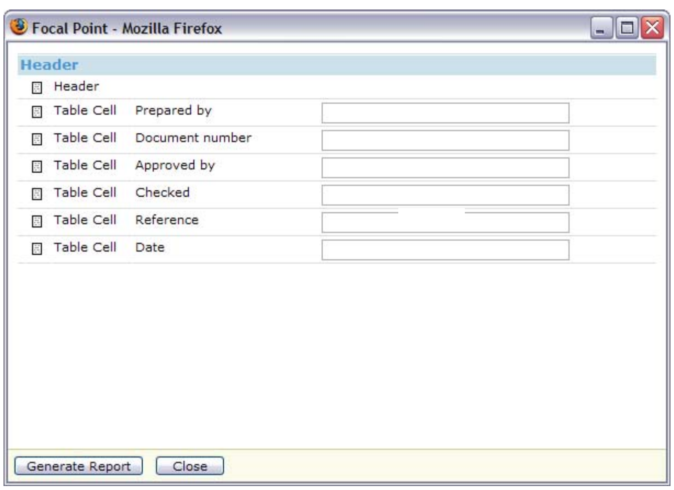
Printing a report

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

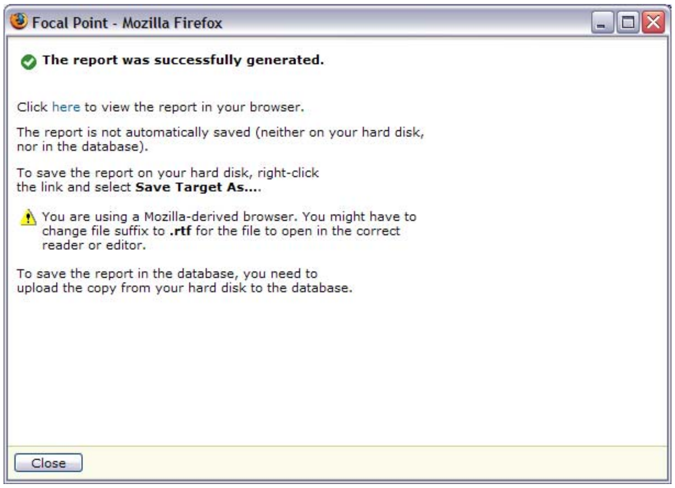
1. Click **Display > All cars**, and click the  button. A window opens in which you can enter basic administrative information:



Click **Next**.



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 http://www.ibm.com/software/rational/support/telelogic/

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.html.
- 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 http://www.ibm.com/software/support/.
- 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	Description
1	The problem has a *critical* 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 *significant* business impact: The program is usable, but it is severely limited.
3	The problem has *some* business impact: The program is usable, but less significant features (not critical to operations) are unavailable.
4	The problem has *minimal* 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 https://www.ibm.com/software/rational/support/ 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 http://www.ibm.com/software/support/help.html

     You can also open an online service request using the IBM Support Assistant. For more information, go to http://www.ibm.com/software/support/isa/faq.html.
   - **By phone:** For the phone number to call in your country or region, go to the IBM directory of worldwide contacts at http://www.ibm.com/planetwide/ 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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