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User Guide for ClearSpecs LiteRM® using WhizFolders™ Organizer Pro

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Preface

This user guide is not a tutorial on project management, risk management, nor requirements management. It is meant to help you understand and get the most out of LiteRM®.

LiteRM® needs **WhizFolders™ Organizer Pro**, version 6.5.7 or later (http://whizfolders.com/?did=gga). WhizFolders only runs on **Windows™ 7, Vista, XP, 2000, …**

Suggestions for improving LiteRM or any of its components including this guide will be appreciated and carefully considered. Email your comments to david@clearspecs.com

Using LiteRM

Effective use of LiteRM proceeds as follows:

Step 1. Explore LiteRM to find out what is present and what is missing (i.e., expand all topics).

LiteRM can be used for one or both of the following activities:

- manage requirements information
- manage developer understanding of requirements (see articles: **"Visualize & Manage Develop Understanding"** and **"Improve Requirements Understanding by Playing Cooperative Games"** www.ManageDevKnow.com)

Step 2. Decide what you want to do with LiteRM and create your own template(s).

Using copies of the LiteRM file, add things you want, delete things you don't (e.g. irrelevant qualities – ease of installation for website development) and change things you wish were different i.e., add, delete, or change topics and document templates.

You may need to create different file templates for different types of software or different project situations. Save each of your customized file templates, so they can be used at the start of your projects.

Step 3. Begin a project by selecting a customized template and tailoring it to the specifics of the project.

Iteratively add information that you want to manage including new facets (trees), attributes, states, and associations.

Tips on adding information:

1. You can scale usage by adding subsystems under a system or by using a separate file for a subsystem.

2. The following facets (trees) may be useful additions:

Vision

1. Background
   - 1.1 Enterprise Needs and Opportunities
   - 1.2 Enterprise Objectives and Success Criteria
   - 1.3 Alternative Strategies
   - 1.4 Strategy Consequences and Risks
2. Vision
   - 2.1 Vision statement
   - 2.2 Major features
   - 2.3 Assumptions and Dependencies
3. Scopes, Limitations, and Exclusions of Releases and Iterations

[-- derived from Karl Wiegers' **Software Requirements** (p. 82)]

Info Source Contacts

1. Name
2. Email
3. Desk phone
4. Cell phone
5. Location

Reqts Conflicts

1. Conflict(s)
2. Tradeoffs
3. Resolution
4. States = < open, closed>

Derivations

1. Source requirement(s)
2. Current facts and assumptions
3. Reasoning
4. Derived requirement(s)

3. You can organize instances of a facet into groups (subtrees). For example, if there are different types of customers using your system, the customer user role could be a group of personas, one for each type.

4. You can use just a facet (topic) name or add other details that you find useful in the associated document. Preface facet names as follows: UR#- (User Roles), OM#- (Object Models), TC#- (Trigger Conditions), EUC#- (Essential Use Cases), and ATD#- (Acceptance Test Designs) where # is an optional integer.

   To use a document template (e.g. for object models), copy and paste it at the appropriate level in the topic outline. If a template has fields you don't need or want, don't use them. If you want a field that's missing, add it. For example, if you need to track changes, add a change history attribute.

5. Where to put 'business rules'.

   a. Rules specific to User Roles (actors) should appear as either responsibilities or privileges.

   b. Requirements-specific rules (associated with functions, interfaces, data, or qualities) should be included with these descriptions. For example, 'No display or printout may contain more than the last four digits of a Social Security number' should be found in External Data requirements for the Social Security number.

   c. Rules can also be expressed as rich definitions (e.g. action contracts, derived conditions, derived tasks, and derived values) and associated with requirements.

   d. Domain or Enterprise rules that are not covered above can be added as a Rule facet.

6. Associations can help understanding

    a. Definitions, user roles, object models, trigger events, essential use cases, and acceptance test designs can be linked to individual requirements or groups of requirements

    b. Any topic (e.g. essential use case) can be linked to any other topic (e.g. acceptance test design)

    c. Some attributes can have link values e.g. assignment: &Jane

    d. External documents can be linked to topic notes, so information in other forms e.g. data flow diagrams, can be linked into the framework

7. A facet can be in multiple states at the same time. For example, a requirement can be in a **requirement state** < unverified, verified, implemented, inactive >
and in a **developer understanding state** <superficial, limited, deep> at the same time.

    Change states by cutting and pasting the at-sign (@).

8. WhizFolder capacity limits.

    a. The size of a WhizFolder file should stay under 2 GB.

    b. A topic can be as large as a GB, but large topics slow down topic browsing.

    c. There is no limit on the number of topics, but a large number may slow down certain operations like adding a new topic. We have seen cases of more than 5000 topics in one file.

Step 4. Use WhizFolder functions to manage your requirements information.

a. Hyperlink to external diagrams and documents related to your requirements.

b. Sort topics and export or print topic sets and topic lists.

c. Spell check and password protect your files.

d. In Settings on the Tools menu, choose the Backup tab and then Backup Options and make sure you have defined a **Backup Folder**. In File Options on the Tools menu, choose the Backup tab and select "Automatically backup on close."

Step 5. Use Search/Find to query attributes, states, and associations.

For each project, use a copy of the sample search term library to begin building your library of search/find expressions.

```
Developer Understanding states

Search/Find expressions
  @sup
  @lim
  @deep

Requirement states

Search/Find expressions
  @Unverified
  @Verified
  @Impl
Search expressions
  '@Inactive' and (not template)
```

Sample of Common Search Expressions in LiteRM

Tailor and supplement your library to contain the project's frequently searched expressions.

Copy and paste an expression from your library to initialize the search/find command.

To select all topics found by **search**, right-click in the search window and choose the "Select All these Topics" function.

Review selected topics in context and/or create a separate file (see Step 6).

Step 6. Seek comments by sharing your project requirements file or portions of it.

Select topics to be shared. (See Step 5 above)

If you do **not** have Word,
Print Selected Topics to a PDF (File menu) – having installed PDF995 or comparable

If you have Word, create a PDF **with topic bookmarks** as follows:

a. Export Selected Topics (all) to a Single RTF file as Word Outline (Tools menu)
b. Where necessary, separate outline entries with blank lines in the Word file
c. From Word Print Layout view, create a Table of Contents (References menu)
d. Print as PDF (Office button) with "Create bookmarks using Headings" selected on the Print as PDF Options menu

If you and potential commenter's all have Word,

a. Export Selected Topics (all) to a Single RTF file as Word Outline (Tools menu)
b. Where necessary, separate outline entries with blank lines in the Word file
c. From Word Print Layout view, create a Table of Contents (References menu)

If you share a PDF, commenters can use the Sticky Notes and Highlighting Text capabilities of Adobe Reader 10.

If you share a Word file, commenters can use the commenting capabilities of Word.

For viewing only, you can send a WhizFolders file to someone with a freeware viewer or create an ebook as well as creating a PDF or RTF.

More Resources

LiteRM

1. User Guide for LiteRM Reporting
2. KI Website Reqts Info – sample collection of reqts info
3. KI Website Search Terms txt file -- sample search term library

WhizFolders

1. Intro to WhizFolders
2. WhizFolders website -- http://whizfolders.com/?did=gga