Cordys Process Factory

User Manual: **Requirement Management MashApp**

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Contents

1. Introduction

This user manual is designed to guide you through using the **Requirement Management** MashApp solution to manage the business requirements of your organization. This MashApp was built using **Composer**, a MashApp tool from **Cordys Process Factory** (**CPF**).

Usually, when you have a manual requirement management system, the bottlenecks are many. For example, the long tedious procedures of managing and processing business requirements are time-consuming and taxing. Moreover, your projects might lag.

To avoid such bottlenecks, we are providing the **Requirement Management** MashApp, which will help you:

- Reduce cycle time
- Reduce project failure
- Attain greater control over project resources

To use the **Requirement Management** MashApp, you need to first set up application users and then set up MashApp **Master Data** such as countries, business partner types, business partners, contacts, and products and components.

After setting up the required data, you can use the MashApp to manage the business requirement process. You can create new business requirements, initiate solutions, create solution requirements, and assign them to various developers. You can also monitor data through forms, charts, and reports.

2. Setting up Application Users

You need to set up application users to enable users in your organization to access the **Requirement Management** MashApp. You also need to assign users the appropriate privilege to restrict their access within the MashApp. Do the following to set up application users.

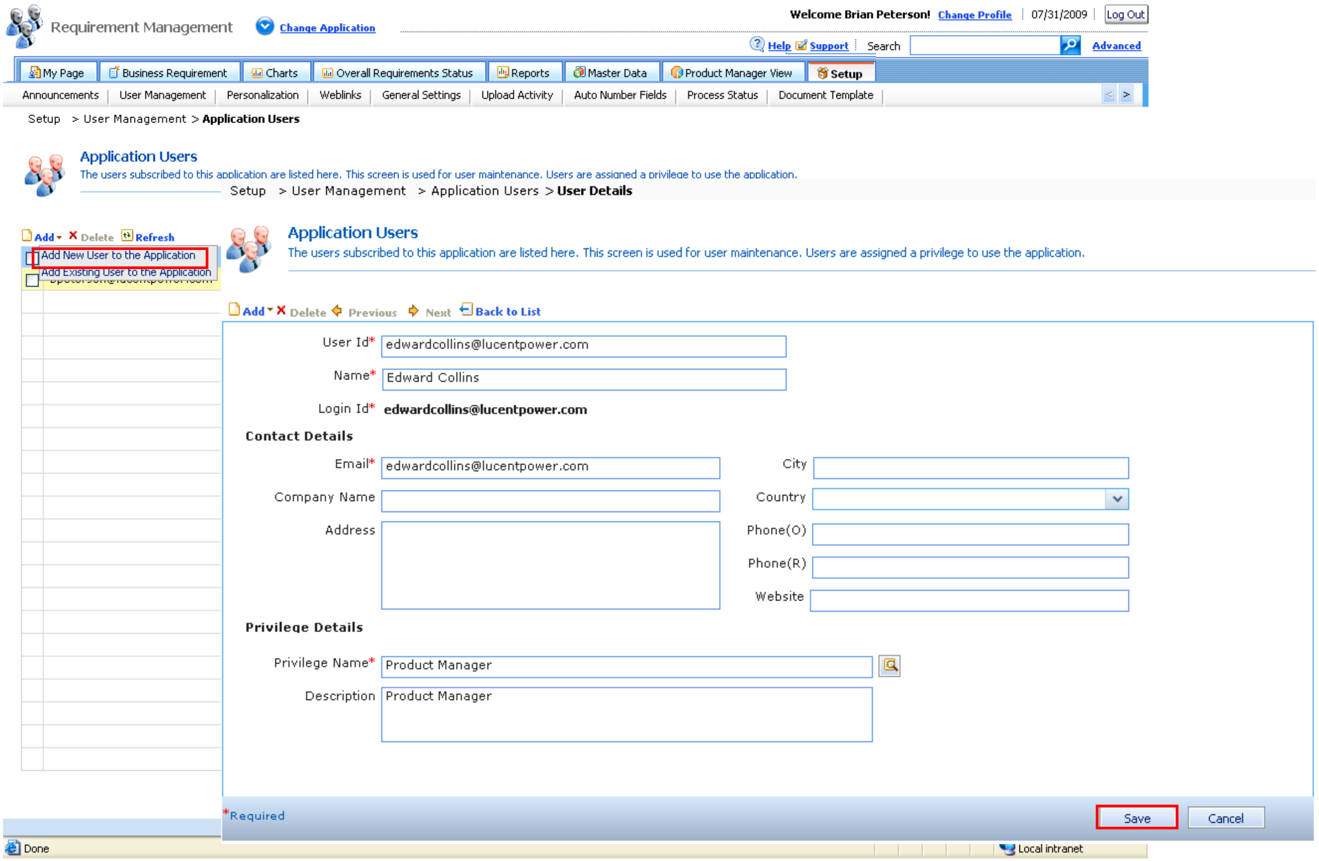
1. Click **Setup** → **User Management**. The **User Management** page appears.
2. Click **Go to** for **Application Users**. The **Application Users** page appears, displaying a list of existing application users, if any.
3. Create an application user. Do the following.
   a. Click **Add** and select **Add New User to the Application**.
   b. In the **User Id** field, type the unique id of the user in the form of a valid email address. For example, "lmiller@radiantpower.com". This email address is populated in the **Login Id** and **Email** fields respectively.

      The credentials required to access the **Requirement Management** MashApp will be sent to the user via email.

      > ***Note**: You cannot modify the **Login Id**.*

   c. Provide the required details of the application user such as **Name** and **Contact Details**.
   d. Assign a privilege to the user to access the **Requirement Management** MashApp. Click for **Privilege Name**. The **Application Privileges** dialog box appears.
   e. Select one of the following privileges to assign to the user according to their role in the organization:
      - **Requirement Management Administrator**: This privilege enables users to create application users as well as maintain the **Master Data** that needs to be set up for the functioning of the MashApp. For example, Countries, Business Partner Types, Business Partners, Contacts, and Products and Components.
      - **Product Manager**: This privilege enables users to approve business requirements and create solution initiatives and solution requirements for business requirements.
      - **Project Manager**: This privilege enables users to assign certain tasks to developers to fulfill business requirement solutions.
      - **Developer**: This privilege enables users to process solution requirements for business requirements.
      - **User**: This privilege enables users to submit business requirements.

      Click **OK**. The privilege is assigned. The description of the privilege appears in the **Description** field.



f. Click **Save**.

An application user is created and the required privilege is assigned to the user. As soon as the user is added, he or she receives an email with the **Login Id** and **Password** required to log in to the **Requirement Management** MashApp.

This application user is also an organization user. So, you can grant access to this user to other applications in the organization through the **Setup** tab for those applications using the **Add Existing User to the Application** option.

You have created an application user successfully.

3. Setting up Master Data

> ***Note**: You can set up **Master Data** only if you are assigned the **Requirement Management Administrator** privilege.*

After setting up the required application users, you need to set up the **Master Data** that is required for the functioning of the **Requirement Management** MashApp.

3.1 Countries

You can add countries by doing any one of the following, namely, adding countries manually, loading countries using a Web service, or uploading countries from a Google spreadsheet.

Adding Countries Manually

You can add countries manually if there are only a few countries to add. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Countries**. The **Countries** form appears.
3. Click **New** to add a country.
4. Provide the **Country Code** and **Country Description**.
5. Click **Save & Close**.

You have manually added countries successfully.

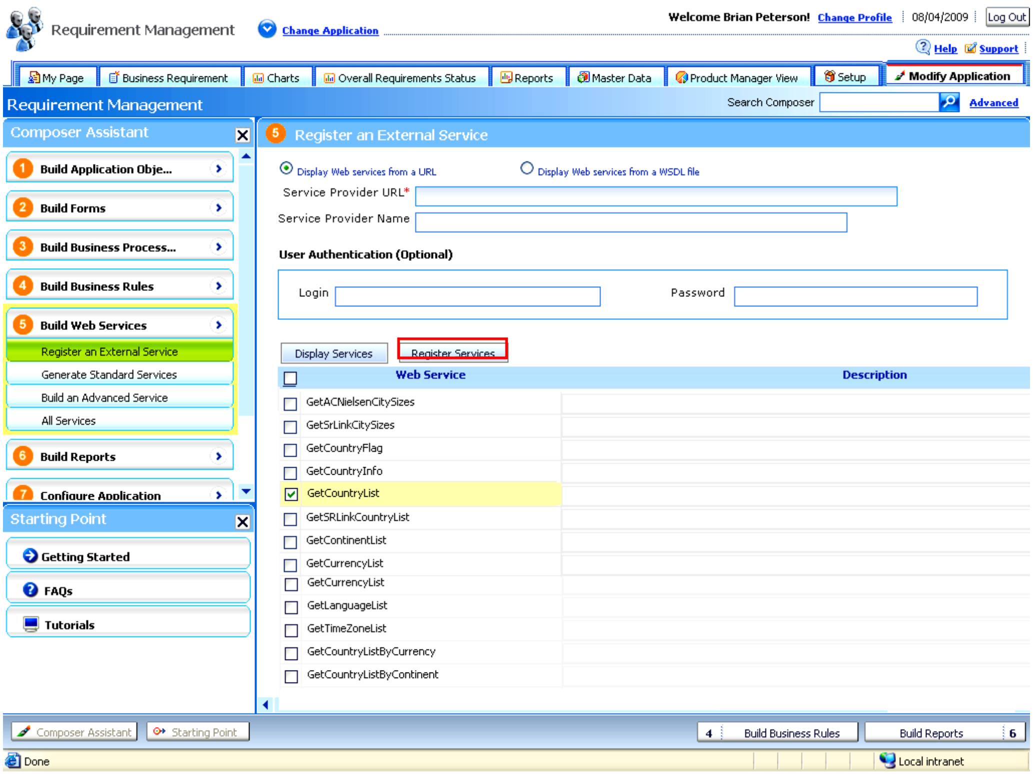
Loading Countries Using a Web Service

You can load countries using a third party Web service. Do the following.

1. Click the **Modify Application** tab and click **Build Web Services → Register an External Service**.
2. Select the **Display Web services from a URL** option.
3. In the **Service Provider URL** field, provide a service provider URL for retrieving the countries. For example, "http://ws.srlink.com/GeoServices/CountryInfoService.asmx?WSDL".

> ***Note**: The availability of the Web Service depends on the third party Web service provider. If you encounter any issues with the sample URL, try after sometime.*

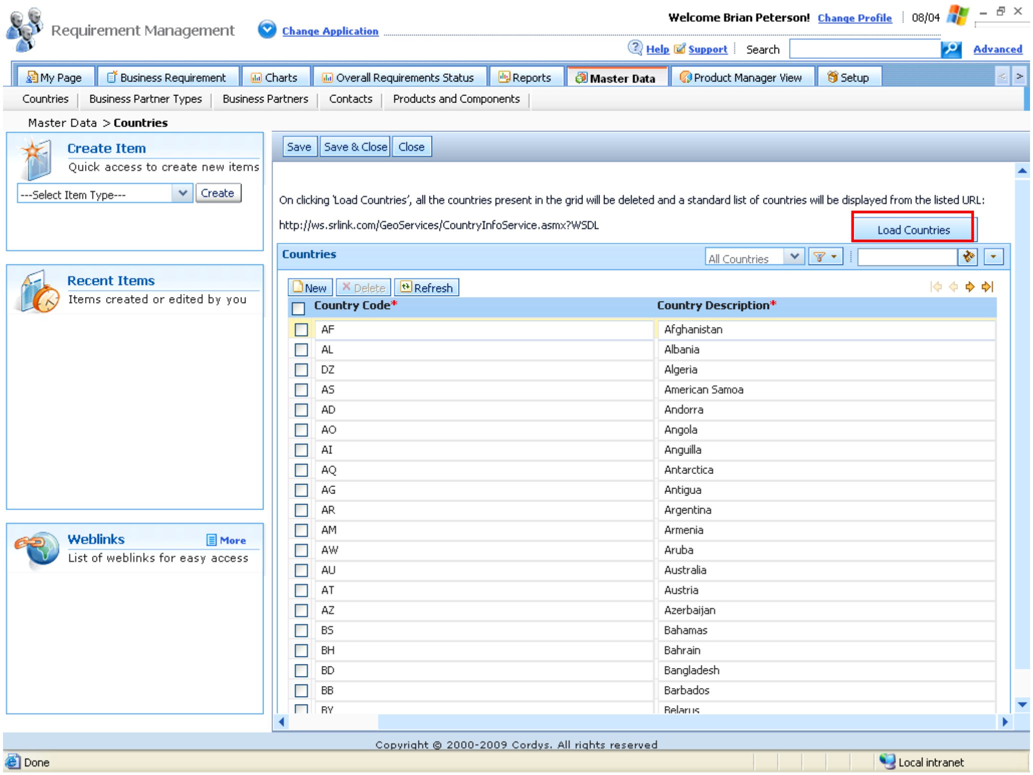
4. Provide a **Service Provider Name**, if required. This is optional.
5. Leave **User Authentication** blank as it is not required for this Web service.
6. Then, click **Display Services**. The Web services are displayed.
7. Select the check box for the **GetCountryList** Web service and click **Register Services**.



You have registered the **GetCountryList** external Web service successfully.

Now, do the following to load the countries in the **Countries** form.

1. Click the **Master Data** tab.
2. Click **View** for **Countries**. The **Countries** form appears.
3. Click **Load Countries** to load all the standard countries from the displayed URL. The countries are listed in the **Countries** grid.



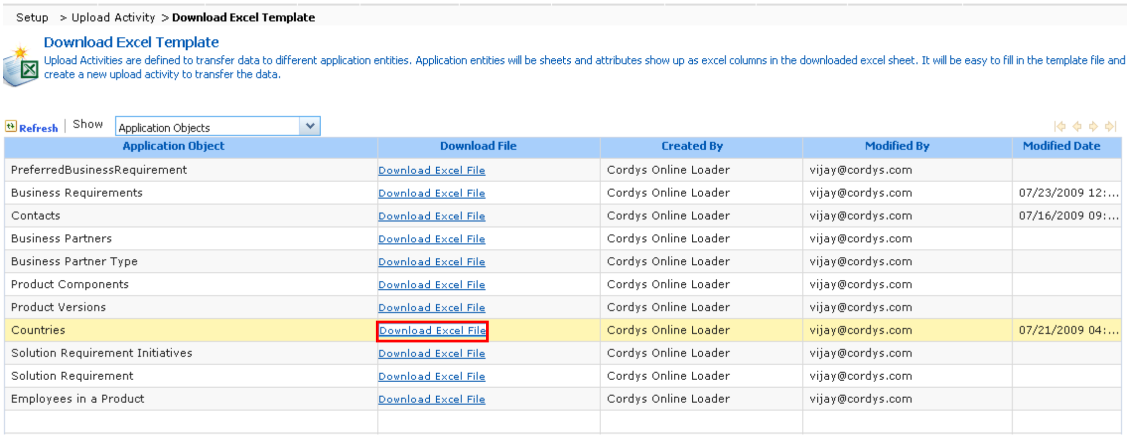
4. Click **New** to add a country that is not in the standard list, if required. You need to provide the **Country Code** and **Country Description** to add a country.
5. Click **Save & Close**.

You have loaded countries successfully.

Uploading Countries from a Google Spreadsheet

You can upload countries using a Google account. Do the following.

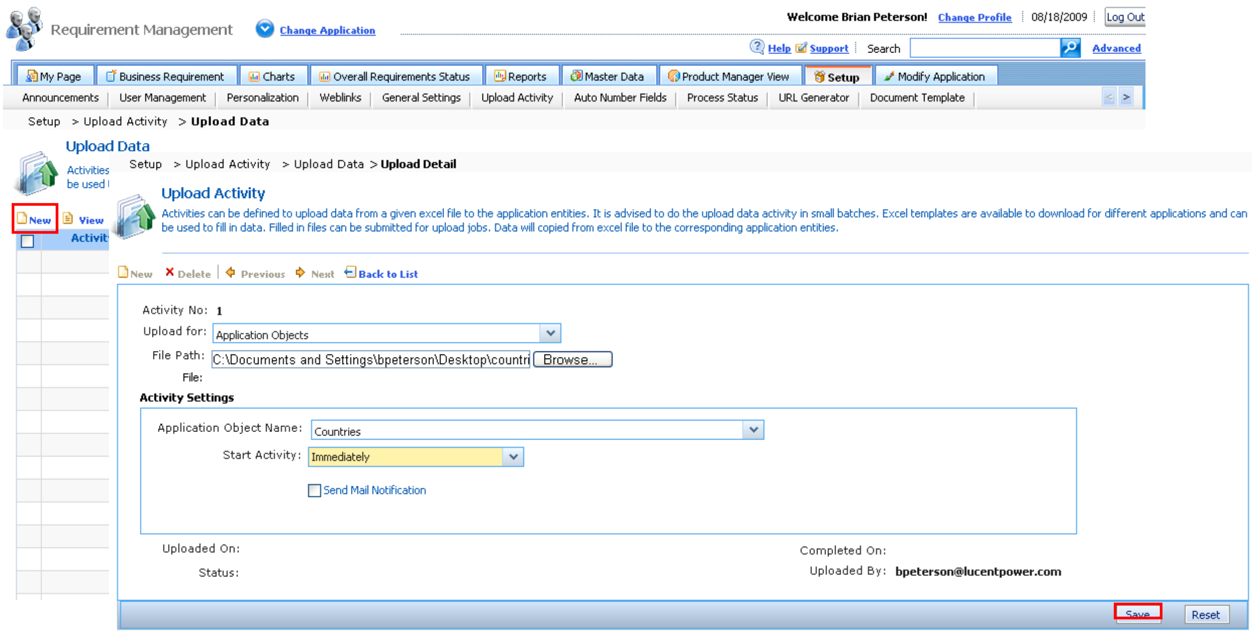
1. Click the **Setup** tab.
2. Click **Upload Activity → Download Excel Template**. The **Download Excel Template** page appears. Do the following.
   a. In the **Show** drop-down list, select **Application Objects**.



b. Click **Download Excel File** for **Countries**. Click **Save** and save it to the desktop.

3. Copy the standard list of countries from the Google spreadsheet URL "http://spreadsheets.google.com/ccc?key=0AgU2e_O0PgCtdGZIQkR5UGlRbXRJMDNiV1k3MFV4dVE&hl=en" to the downloaded template and click **Save**.
4. Click **Upload Activity → Upload Data**. The **Upload Data** page appears.
5. Click **New** to upload data. The **Upload Activity** page appears.
6. In the **Upload for** drop-down list, select **Application Objects**.
7. Click **Browse** for **File Path**, select the template with countries data, and click **OK**.
8. In the **Activity Settings** section, do the following.

a. In the **Application Object Name** drop-down list, select **Countries**.



b. In the **Start Activity** drop-down list, select **Immediately**.

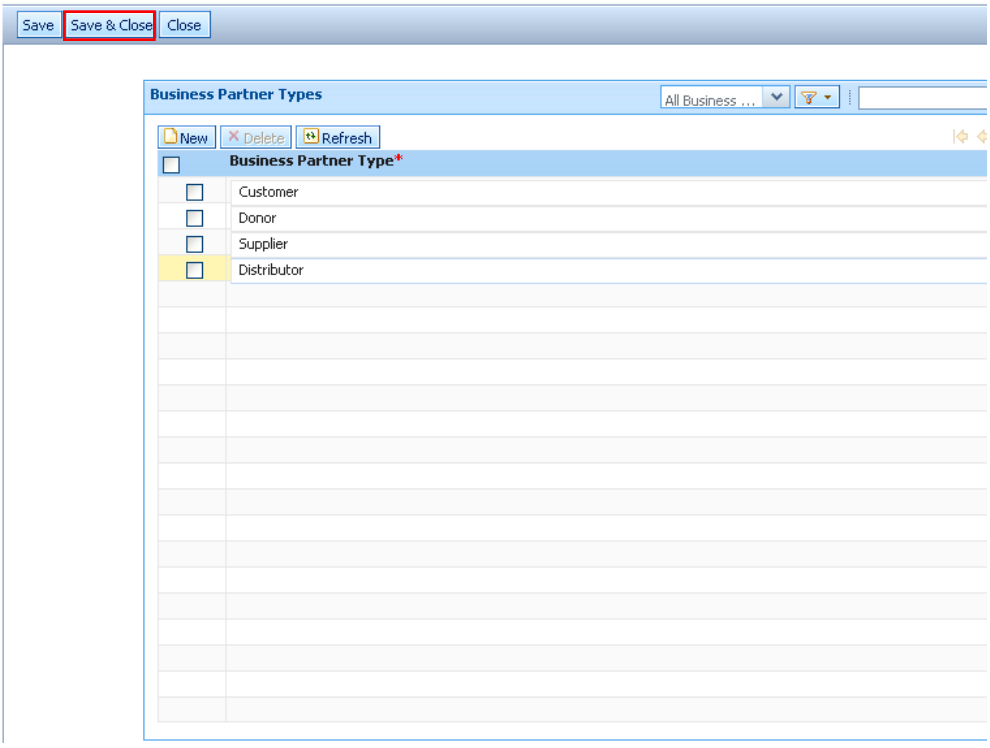
9. Click **Save**.

You have uploaded countries successfully.

3.2 Business Partner Types

You need to add the types of business partners based on the nature of their business. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Business Partner Types**. The **Business Partner Types** form appears.
3. Click **New** to add a new business partner type.
4. In the **Business Partner Type** field, provide the type of business partner based on the nature of business. For example, Supplier.



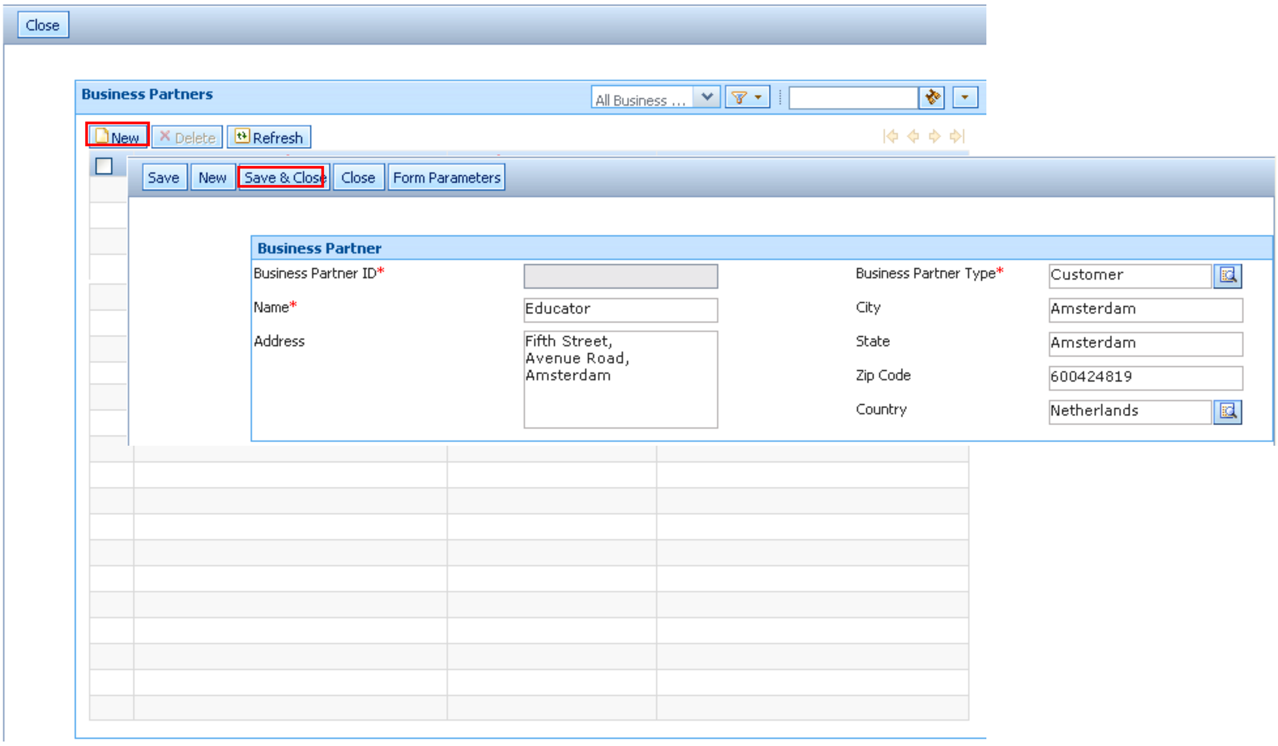
5. Click **Save & Close**.

You have added a business partner type successfully.

3.3 Business Partners

You need to add the names of your business partners. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Business Partners**. The **Business Partners** form appears.
3. Click **New** to add a new business partner. The **Business Partner** form appears.
   a. Provide a **Business Partner Name**.
   b. Click for **Business Partner Type** and select a business partner type.
   c. Provide other details such as **Address**, **City**, **State**, etc. To select a **Country**, click and select a country from the list that appears.



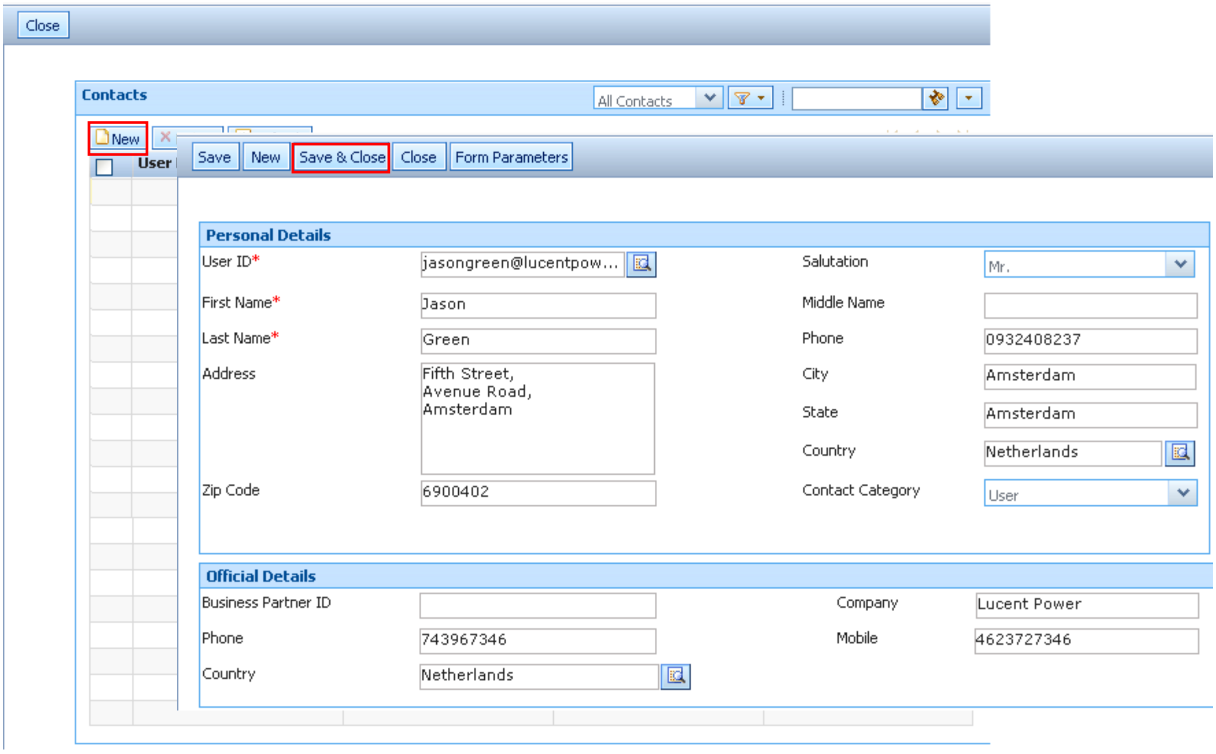
4. Click **Save & Close** to save the changes and close the **Business Partner** form. The new business partner appears in the list of business partners in the **Business Partners** form.
5. Click **Close**.

You have added a business partner successfully.

3.4 Contacts

You need to add the contacts who need to use this application. Do the following.

1. Click the **Master Data** tab.
2. Click **View** for **Contacts**. The **Contacts** form appears.
3. Click **New** to add a new contact.
4. Click for **User ID**, select the organization user you want to add as a contact, and click **OK**.
5. In the **Contact Category** drop-down list, select one of the following:
   - **User**
   - **Developer**
   - **Other**
6. Provide other required details.



7. Click **Save & Close.**

You have added a contact successfully.

3.5 Products and Components

You need to add the products and corresponding components for which business requirements can be created.

Adding Products

Do the following to create a product.

1. Click the **Master Data** tab.
2. Click **View** for **Products and Components**. The **Products and Components** form appears.
3. In the **Products** section, click **New**.
4. In the **Product** field, provide the name of the product.
5. In the **Product Version** field, provide the version for the product.
6. Click for **Responsible Person**, select a contact who is the product manager for the product, and click **OK**.
7. Click for **Scheduled Start Date** and select the date on which designing the product is scheduled to start.
8. Click for **Scheduled End Date** and select the date on which designing the product is scheduled to end.
9. Click for **Execution Start Date** and select a predefined date on which the execution for the particular version of the product needs to start.

10. Click for **Execution End Date** and select a predefined date on which the execution for the particular version of the product needs to end.
11. In the **Status** field, the default value is **Active**.
12. Click **Save** at the top of the form.

You have added a product successfully.

Adding Users

You need to add users for the product. Do the following.

1. Select the project.

> ***Note:*** *If the* ***Product Manager*** *wants more users to raise business requirement, he or she can add more users under the product through* ***Product Manger View*** *tab.*

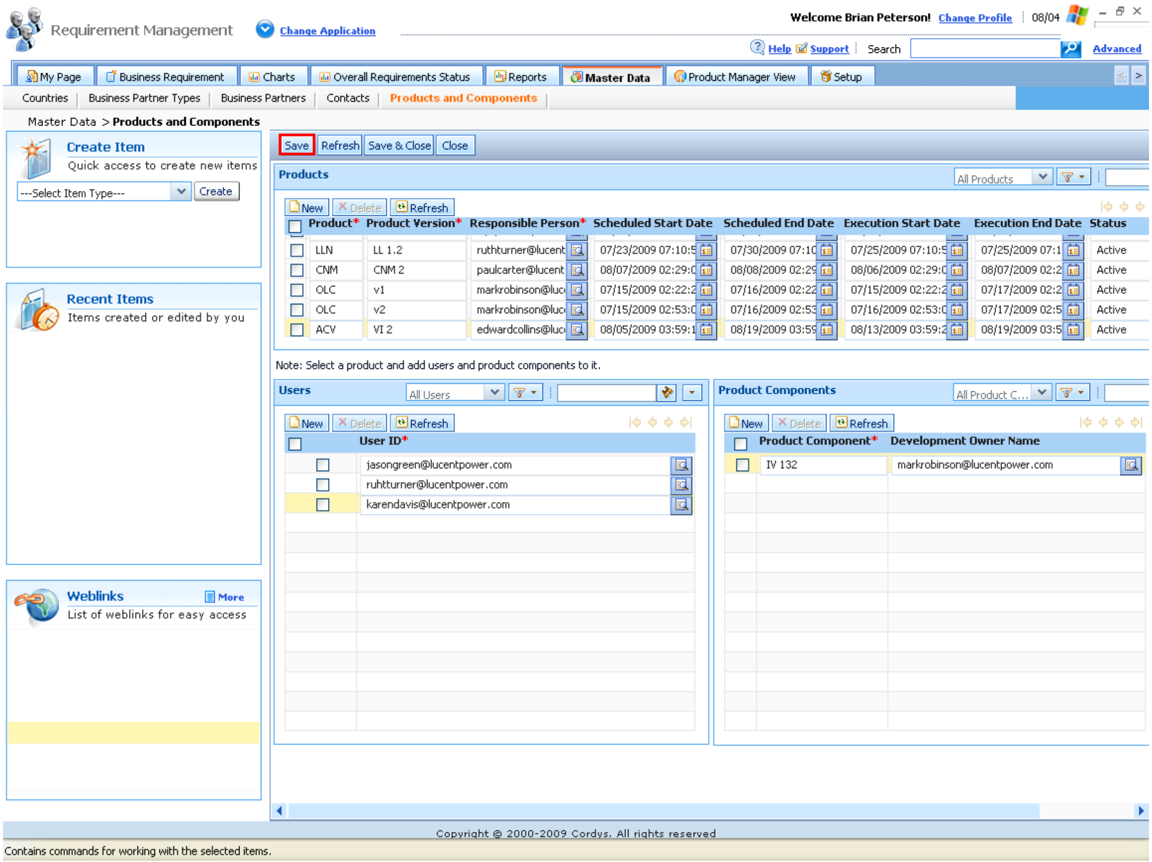
2. In the **User** section, do the following.
    a. Click **New**.
    b. Click for **User ID**, select the user you want to add under the project, and click **OK**.
3. Click **Save** at the top of the form.

You have added a user to the product successfully.

Adding Product Components

You need to add components for the product. Do the following.

1. Select the project.
2. In the **Product Component** section, do the following to add a new product component.
    a. Click **New**.
    b. In the **Product Component** field, provide the name of the product component.
    c. Click for **Development Owner Name**, select the project manager for the product component, and click **OK**.



3. Click **Save** at the top of the form.

You have added a product component to the product successfully.

4. Creating a Business Requirement

Once the application users and the master data are set up, you can create a business requirement. Do the following.

1. Click the **Business Requirement** tab.
2. Click **New** for **Business Requirement**. The **Business Requirement** form appears.
3. In the **Business Requirement Details** section, do the following.
   a. In the **Priority** drop-down list, select one of the following:
      - **1 (High)**
      - **2**
      - **3**
      - **4**
      - **5 (Low)**
   b. In the **Requirement** drop-down list, select one of the following:
      - **Enhancement**: A requirement to enhance one of the existing features
      - **Functional Change**: A requirement to change the product functionality

- **New Feature**: A requirement to add a new feature to the product

c. Click for **Product**, select the product for which you want to raise a business requirement, and click **OK**.

d. Similarly, click for **Product Version** and **Product Component** and select the product version and product component respectively.

e. Select the check box for **Save preferences** to set the product, product version, and component as preferred settings so that next time you want to submit a business requirement, these values will appear as the default values.

f. In the **Summary** field, provide a summary for the requirement.

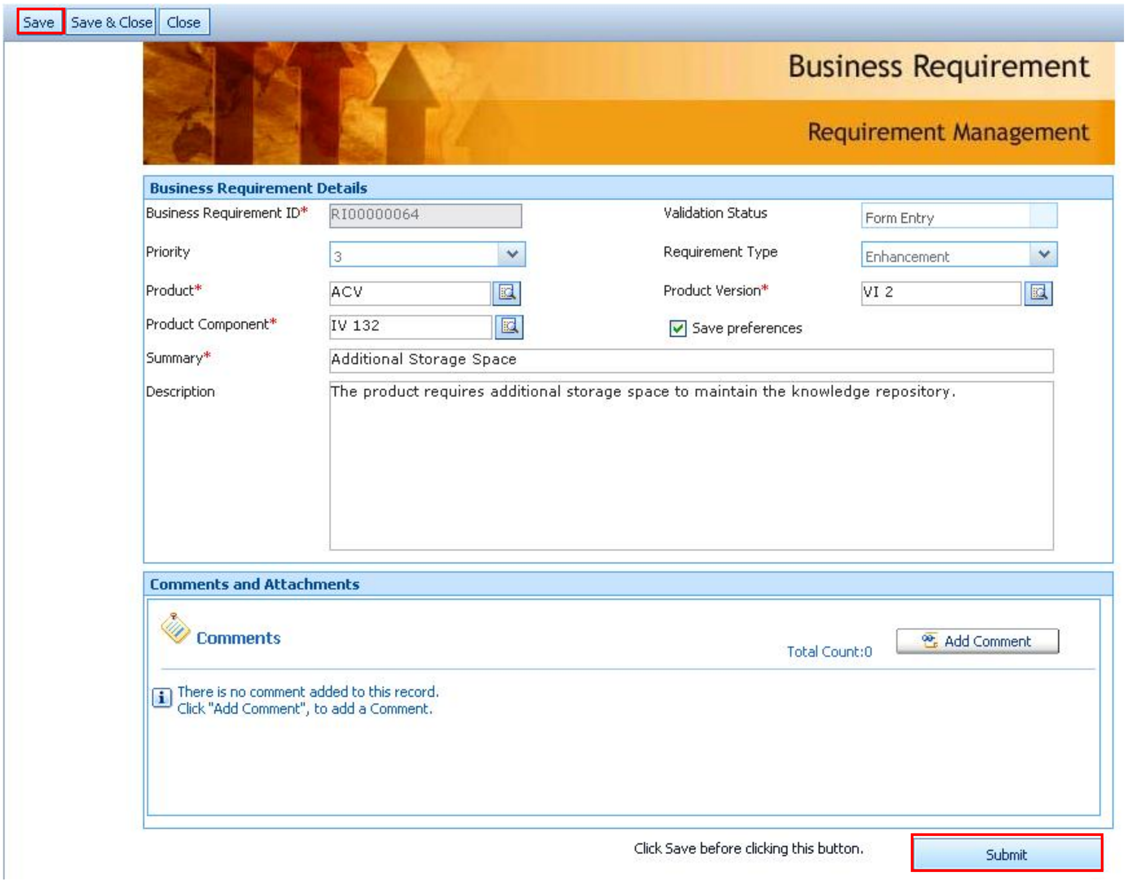
g. In the **Description** field, provide a detailed description about the requirement.

4. If you need to add any comments for the business requirement, do the following.

a. In the **Comments and Attachments** section, click **Add Comment**.

b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.

c. Click **Save**.



5. Click **Save**.

6. Then, click **Submit**.

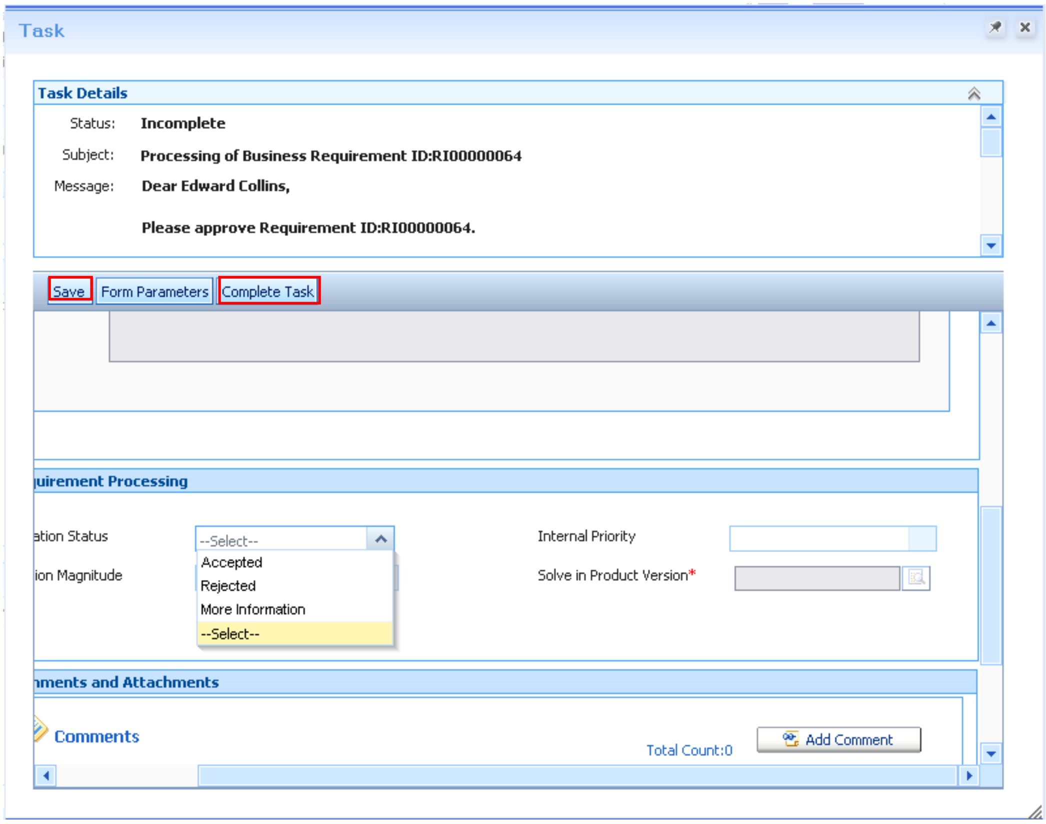
5. Approving the Business Requirement

Once the approval process for your business requirement starts, it is sent to the concerned product manager for approval.

The **Product Manager** for the product receives a task to approve the business requirement, which is available through **My Page → My Tasks**. He or she also receives an email with the task details.

Do the following to review the business requirement and approve the task.

1. Double-click the task. The task opens, displaying the details of the business requirement.
2. Review the details and in the **Status** drop-down list, select one of the following:
   - **Approved**: If approved, the **Product Manager** needs to initiate a solution initiative for the business requirement.
   - **Rejected**: If rejected, a notification is sent to the user who submitted the business requirement and the approval process ends.
   - **More Information**: If more information is required, the business requirement is sent back to the user who submitted the business requirement. The user can then provide the required details and then send the business requirement for approval again.



3. In the **Internal Priority** drop-down list, select a priority for the business requirement for internal reference.
4. In the **Magnitude** drop-down list, select the magnitude of the business requirement. The following options are available:
   - **1 (Huge)**
   - **2**
   - **3**

- **4**
- **5 (Low)**

5. Click for **Product Version**, select a product version in which you want the business requirements and click **OK**.
6. If you need to add any comments for the business requirement, do the following.
   a. In the **Comments and Attachments** section, click **Add Comment**.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
   c. Click **Save**.
7. Click **Save** and then, click **Complete Task**.

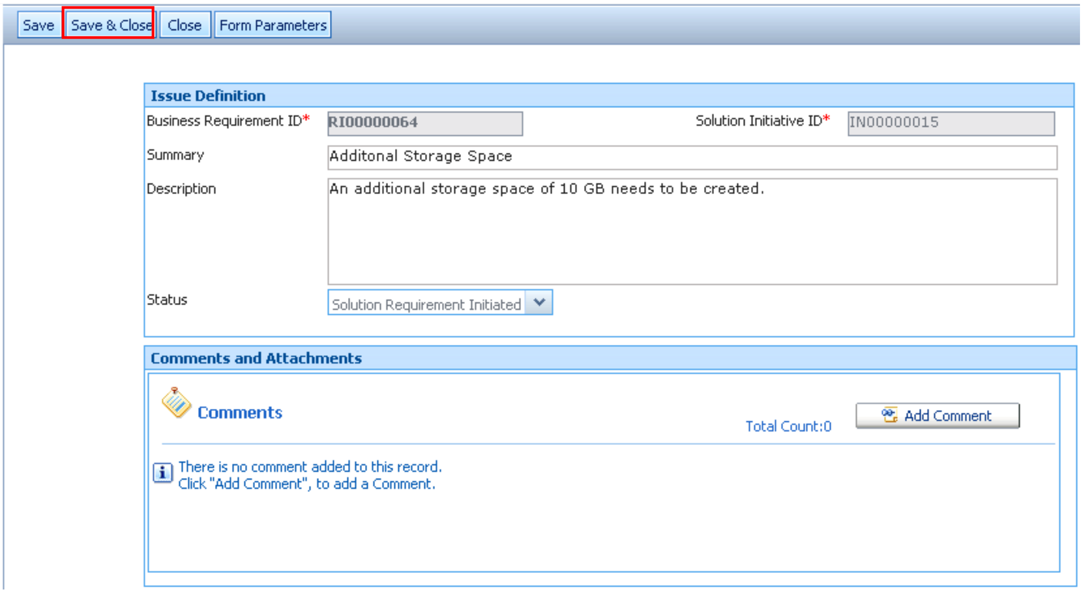
You have approved the business requirement successfully.

6. Creating Solution Initiatives and Solution Requirements

6.1 Creating a Solution Initiative

Once the business requirement is approved, the product manager can create one or more solution initiatives to fulfill the business requirement. Do the following.

1. Click the **Business Requirement** tab.
2. Click **View** for **Business Requirements Assigned to Product Manager**.
3. In the **Business Requirements** section, double-click the business requirement for which you want to create a solution initiative. Review it, if required, and then, click **Save & Close**.
4. Do one of the following to create a solution initiative:
   - Prepare a new solution initiative: Click **Prepare New Solution Initiative** to prepare a new solution initiative for the business requirement.
   - Reuse an existing solution initiative: Click for **Solution Initiative ID**, select the existing solution initiative you want to use, and click **OK**. Then, click **Use Existing Solution Initiative**.
5. In the **Solution Initiatives** section, double-click the solution initiative you created.
6. In the **Issue Definition** section, do the following.
   a. In the **Summary** field, provide a summary of the solution initiative.
   b. In the **Description** field, provide a description of the solution initiative.
7. If you need to add any comments for the solution initiative, do the following.
   a. In the **Comments and Attachments** section, click **Add Comment**.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
   c. Click **Save**.

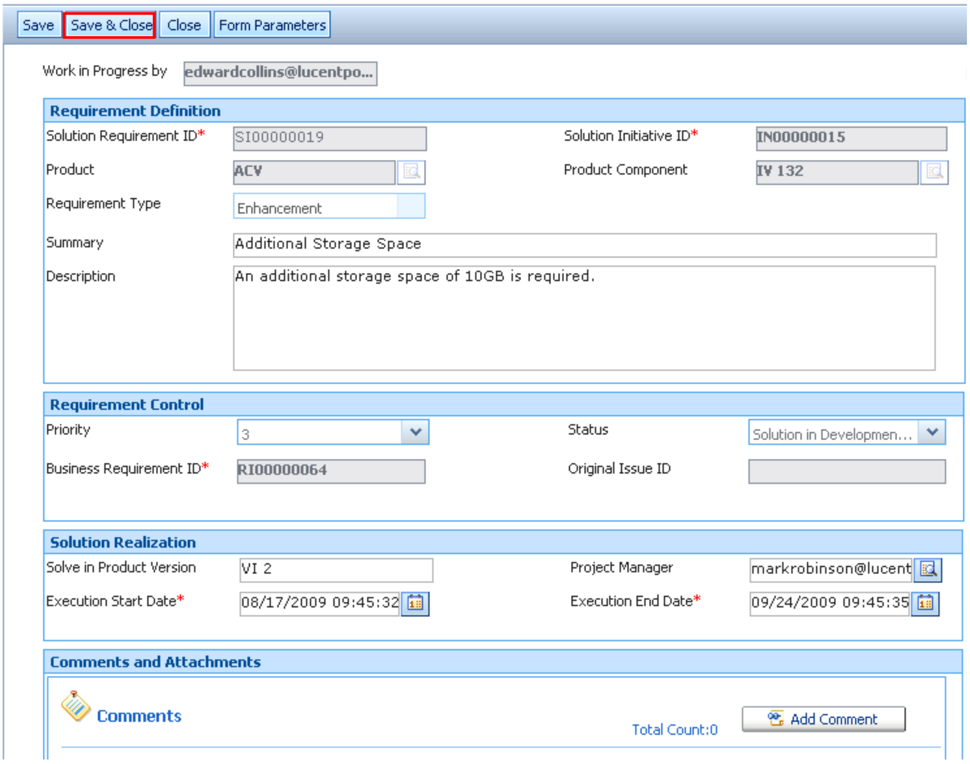


8. Click **Save & Close**.

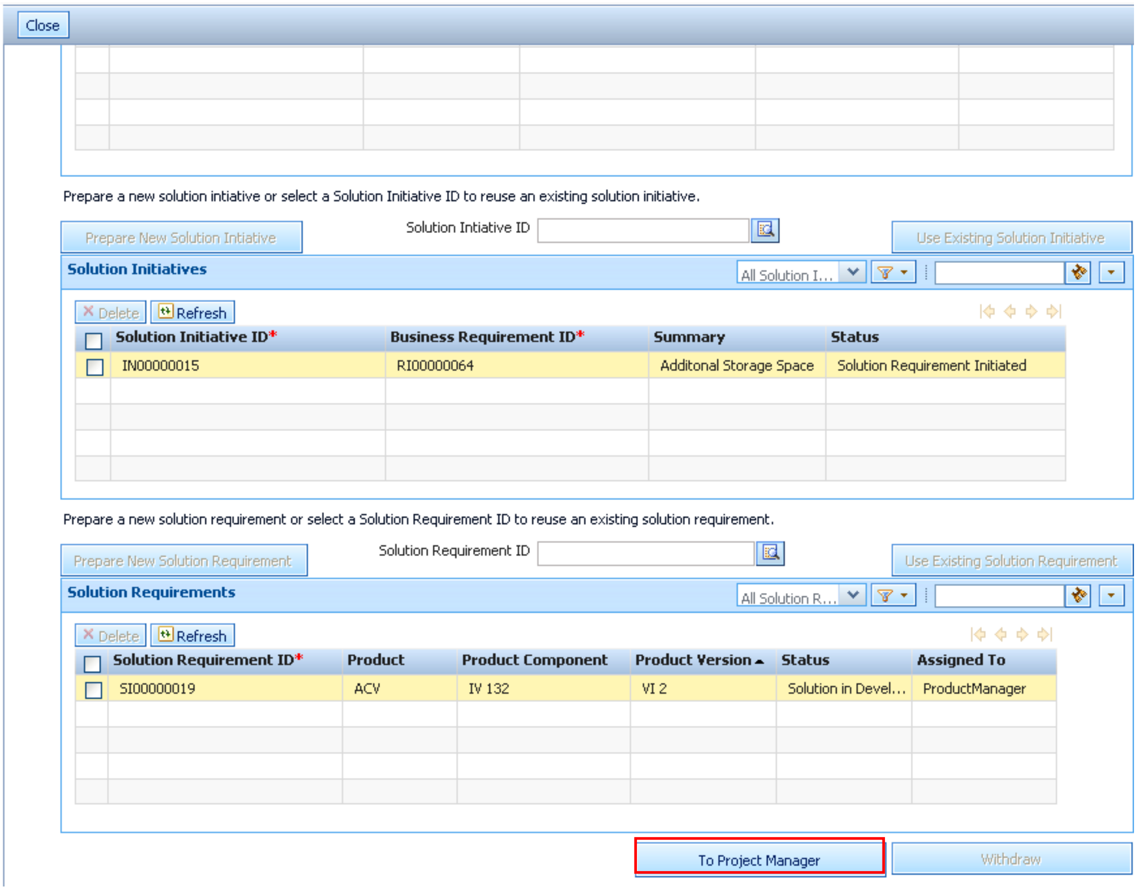
6.2 Creating a Solution Requirement

After creating a solution initiative, the product manager can create one or more solution requirements to fulfill each solution initiative. Do the following.

1. Do one of the following to create a solution requirement.
   - Prepare a new solution requirement: Click **Prepare New Solution Requirement** to prepare a new solution requirement.
   - Reuse an existing solution requirement: Click for **Solution Requirement ID**, select the solution requirement you want to use, and click **OK**. Then, click **Use Existing Solution Requirement**.
2. In the **Solution Requirements** section, double-click the solution requirement you created.
3. In the **Requirement Definition** section, do the following.
   a. In the **Summary** field, provide a summary of the solution requirement.
   b. In the **Description** field, provide a description of the solution requirement.
4. In the **Solution Realization** section, do the following.
   a. Click for **Execution Start Date** and select the date to start executing the solution requirement.
   b. Click for **Execution End Date** and select the date on which the execution of the solution requirement needs to be completed.
5. If you need to add any comments for the solution requirement, do the following.
   a. In the **Comments and Attachments** section, click **Add Comment**.
   b. Provide a **Comment Title** and provide text for the comment. You can also click **Add Attachment** to add attachments to the comment, if required.
   c. Click **Save**.



6. Click **Save & Close**.



7. In the **Solution Requirements** section, select a solution requirement and then, click **To Project Manager** to assign a task to the project manager to fulfill the solution requirement.

If you want to withdraw the task assigned to the project manager, select the solution requirement you want to withdraw in the **Solution Requirements** section and click **Withdraw**.

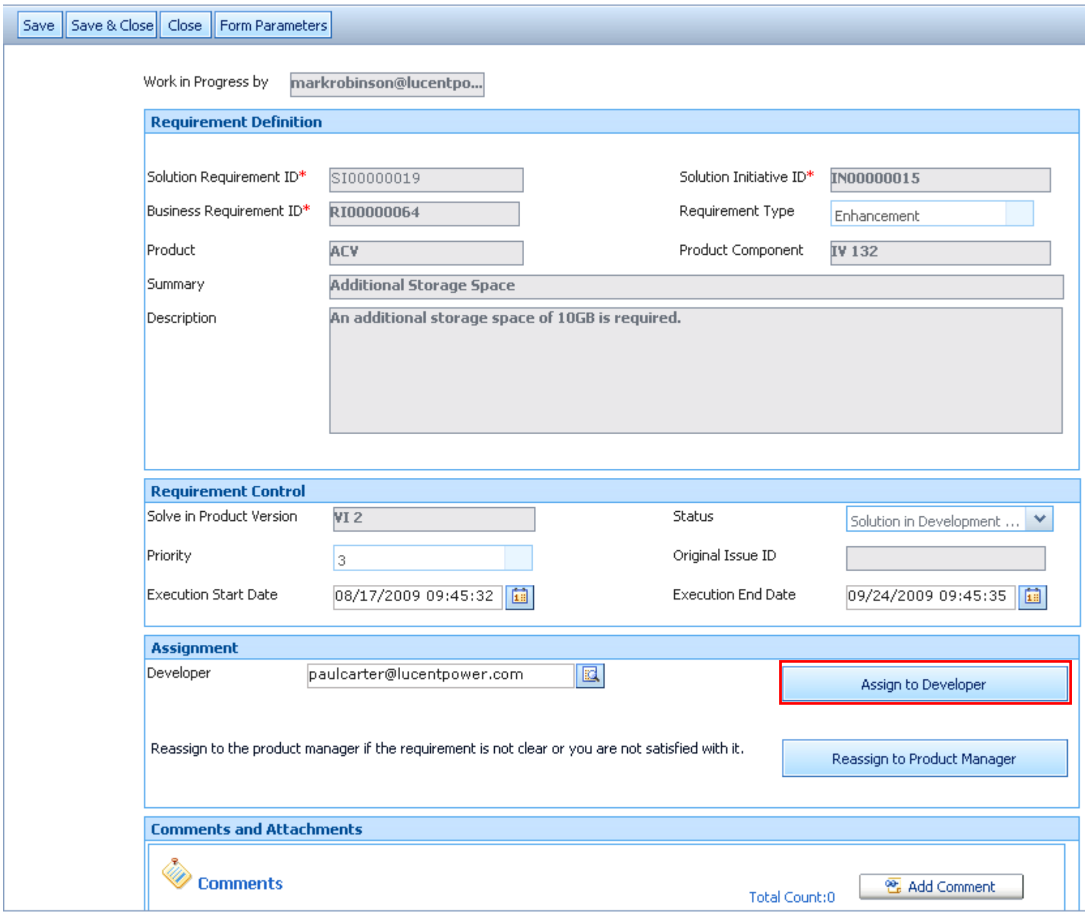
7. Processing Solution Requirements

Once the solution initiatives are created for a business requirement and the corresponding solution requirements are defined, the tasks of processing the solution requirements are assigned to the project manager who in turn delegates them to developers.

7.1 Processing a Solution Requirement by Project Manager

The project manager for the concerned product component receives a task to process the solution requirement. Do the following to complete the task.

1. Click the **Business Requirement** tab.
2. Click **View** for **Solution Requirements Assigned to Project Manager**.
3. In the **Solution Requirements** section, double-click the solution requirement.
4. Review the solution requirement and do one of the following:
   - **Assign to Developer:** You can assign the task to a developer. Do the following.
     a. In the **Assignment** section, click for **Developer**, select the developer to whom you want to assign the task, and click **OK**.
     b. Click **Assign to Developer**.
   - **Reassign to Product Manager:** You can reassign the task to the product manager if the specified solution requirement is not clear. In the **Assignment** section, click **Reassign to Product Manager**.

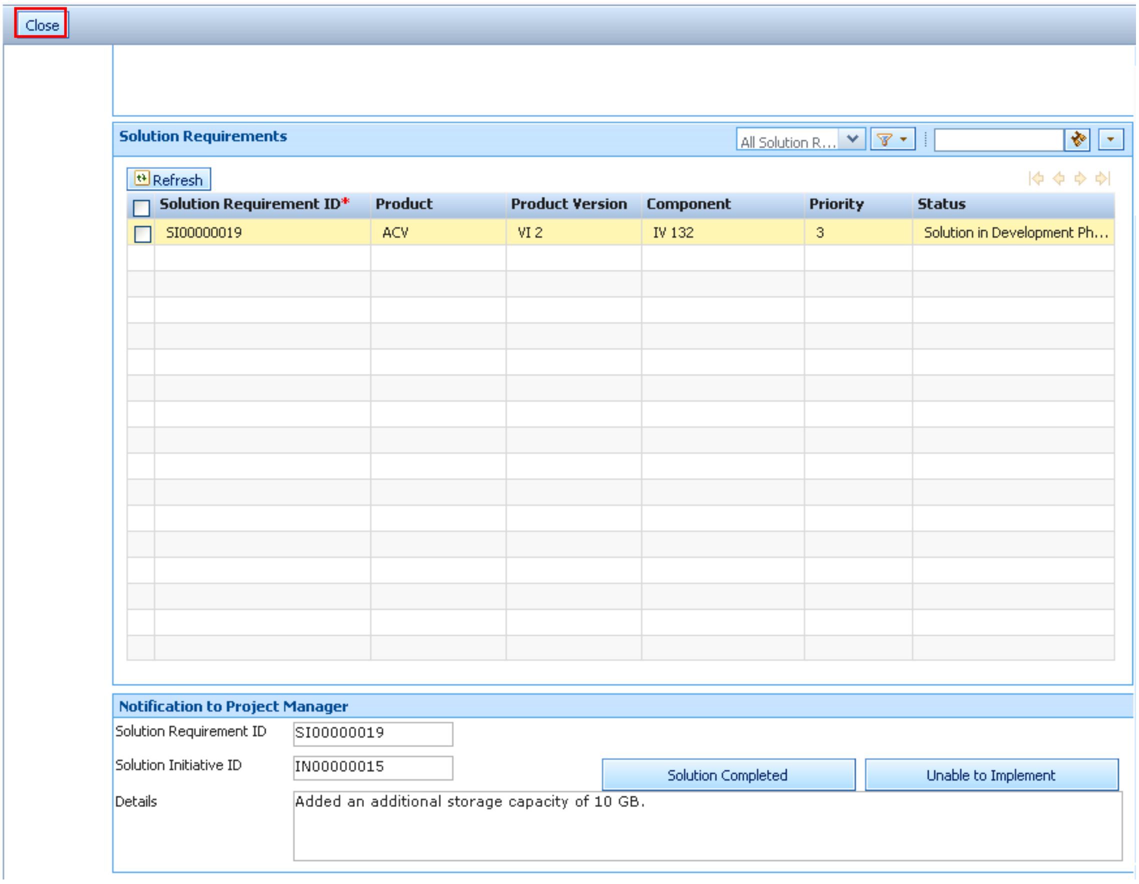


You have completed the task as a project manager successfully.

7.2 Processing a Solution Requirement by Developer

The developer to whom the project manager assigns the solution requirement receives a task to complete the solution requirement. Do the following to complete the task.

1. Click the **Business Requirement** tab.
2. Click **View** for **Solution Requirements Assigned to Developer**.
3. In the **Solution Requirements** section, double-click the solution requirement and review it. If you require more information, click **Reassign to Project Manager** in the **Assignment** section. Then, click **Save & Close**.
4. Once you execute the solution requirement, in the **Notification to Project Manager** section, provide the details of the implementation in the **Details** field and then, click one of the following:
    - **Solution Completed:** Implemented the solution
    - **Unable to Implement:** Unable to implement the solution



5. Click **Close**.

You have completed the task as a developer successfully.

8. Reporting and Monitoring

The **Requirement Management** MashApp enables you to monitor business requirement data through various forms, charts, and reports.

8.1 Forms

On the **Business Requirement** tab, you can view forms to display data on the business requirements that were submitted.

For example, you can view the **All Business Requirements** form to view the business requirements submitted within the organization. Do the following.

1. Click the **Business Requirement** tab.
2. Click **View** for **All Business Requirements.** The **Business Requirements** form appears, displaying the details of all the business requirements submitted within the organization.

Business Requirements

New | Delete | Refresh

Business Requirement ID*	Business Partner Name	Product	Product Component	Product Version	Status
RI00000001	Educator	Online Composer	Form Builder	C3-FP1	Accepted
RI00000002	A1 Corp	Bill Management	B54	B1.5	Accepted
RI00000003	LLN Ltd	ADF	AF3	ADF1.5	Accepted
RI00000004	A1 Corp	Bill Management	B54	B1.5	Accepted
RI00000005	Educator	Online Composer	Form Builder	C3-FP1	Accepted
RI00000006	A1 Corp	ACV	IV 132	VI 2	Accepted
RI00000007	LLN Ltd	ADF	AF3	1.0	Accepted
RI00000008	A1 Corp	ACV	IV 132	VI 2	Accepted
RI00000009	LLN Ltd	ADF	AF3	1.0	Form Entry
RI00000010	A1 Corp	ACV	IV 132	VI 2	Submitted
RI00000011	LLN Ltd	ADF	AF3	1.0	More Information
RI00000012	A1 Corp	ACV	IV 132	VI 2	More Information
RI00000013	LLN Ltd	ADF	AF3	1.0	More Information
RI00000014	A1 Corp	ACV	IV 132	VI 2	More Information
RI00000015	Educator	Online Composer	Form Builder	C3-FP1	More Information
RI00000016	A1 Corp	ACV	IV 132	1.0	More Information
RI00000017	Educator	Online Composer	Form Builder	C3-FP1	More Information
RI00000018	A1 Corp	Bill Management	B54	B1.5	More Information

3. Click **Close**.

You can also view the following forms on the **Business Requirement** tab:

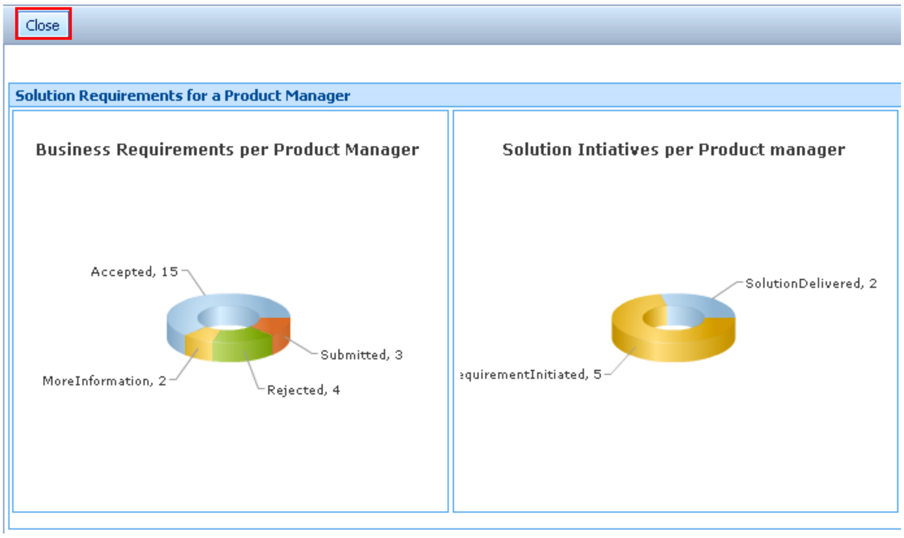
- **My Business Requirements**
- **Business Requirements Assigned to Product Manager**
- **Solution Initiatives per Product Manager**
- **Solution Requirements per Product Manager**
- **Solution Requirements Assigned to Project Manager**
- **Solution Requirements Assigned to Developer**

8.2 Charts

On the **Charts** tab, you can view charts that display business requirement data.

For example, you can view the **Product Manager View** chart to view the details of the business requirement. Do the following.

1. Click the **Charts** tab.
2. Click **View** for **Product Manager View**. The **Solution Requirements for a Product Manager** chart appears, displaying the business requirements per product manager, solution initiatives per product manager, and solution requirements per product manager.



3. Click **Close**.

You can also view the **Project Manager View** chart on the **Charts** tab.

8.3 Reports

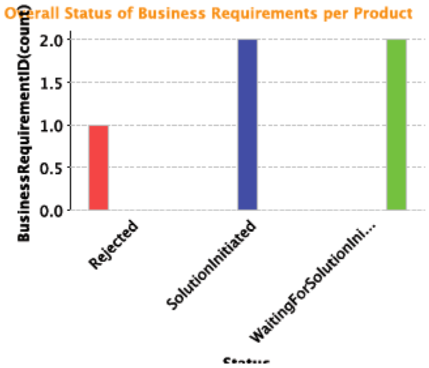
On the **Reports** tab, you can run various reports on business requirement data.

For example, you can run the **Overall Status of Business Requirements per Product** report to view the overall status of the business requirements raised per product. Do the following.

1. Click the **Reports** tab.
2. Click **Run** for **Overall Status of Business Requirements per Product**. The **Report Wizard** appears.
3. In the **Product** field, provide the product for which you want to run the report.
4. Click **Run Report**.
5. Then, click **Download Report**. The report appears, displaying the overall status of the business requirements raised per product.

Overall Status of Business Requirements per Product

Business Requirement ID	Product	Product Version	Product Component
RI00000064	ACV	VI 2	IV 132
RI00000065	ACV	VI 2	IV 132
RI00000066	ACV	VI 2	IV 132
RI00000067	ACV	VI 2	IV 132
RI00000068	ACV	VI 2	IV 132
Number of Records	5		



You can also view the following reports on the **Reports** tab:

- **Business Requirements per Product Manager**
- **Business Requirements per Status**
- **All Business Requirements**
- **Solution Initiatives per Product Manager**
- **Solution Requirements per Product**
- **Solution Requirements per Product Manager**
- **Solution Requirements for a Product Component per Status**
- **Solution Requirements per Project Manager**
- **Solution Requirements per Status**
- **Solution Requirements Assigned to Developer**
- **Solution Requirements per Developer and per Status**

9. Conclusion

In this user manual, you learnt how to set up application users and **Master Data** for the successful functioning of the MashApp. You learnt how to create a business requirement, solution initiatives for the business requirement, and corresponding solution requirements. You also learnt how to process solution requirements. You even got a glimpse of how to monitor data through various forms, charts, and reports that are readily available to you.

10. Contact Us

To report issues or send feedback, contact us at: customercare@theprocessfactory.com