User's Guide

Version 4.0

http://www.analysttool.com

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Chapter I
Introduction

1 Introduction

Congratulations on purchasing Analyst Pro, the most cost-effective Requirements Management tool on the market today! Your new software will make your time more productive, your paperwork more manageable, and your business more successful.

Analyst Pro is a complete management system aimed at helping you manage every aspect of your project so that you can quickly make informed project decisions and serve your customers more efficiently.

Analyst Pro enables project team members to perform essential functions for effective Requirements Management including:

- **Requirements Change Management,**
- **Requirements Analysis, and**
- **Requirements Traceability.**

Keeping track of requirements is vital as complex system or business processes are being developed. Through the Analyst Pro Traceability feature, users can easily document and identify lower-level requirements derived from parent requirements.

In addition, Analyst Pro includes components that enable team members to easily:

- Distribute electronic mail to fellow team members and customer contacts.
- Automatically generate reports, graphs, and charts for project briefings or customer status reports.
- Safeguard project documentation and product source files and locate project documents and track document changes using the new Repository feature.

These are just a few of the features available in the all-new Analyst Pro 4.0.

While Analyst Pro has been designed with simplicity of use in mind, you will find that there are many powerful features provided by the program. You can optimize your investment with all of the information that we provide.

1.1 Requirements Management

This chapter provides a general introduction to *Requirements Management*. It defines the terms 'requirement' and 'Requirements Management', and discusses the benefits of Requirements Management.

1.1.1 What Is a Requirement?

[IEEE 90] offers a good basic definition:

1. **A condition or capability needed by a user to solve a problem or achieve an objective.**
2. **A condition or capability that must be met or possessed by a system or system component to satisfy a contract, standard, specification, or other formally imposed document.**
3. **A documented representation of a condition or capability as in (1) or (2).**

Requirements are concerned with what a system is expected to ***do***, rather than how a system is to be built.

1.1.2 What Is Requirements Management?

Requirements Management establishes a common understanding among the stakeholders (commonly referred to as everyone involved in a project: users, customers, developers, etc.), about the requirements addressed by the software project.

1.1.3 What Are the Benefits of Requirements Management?

The top ten benefits of Requirements Management may be characterized as:

1. **Effective Software Testing -** Requirements Management facilitates effective software testing, which increases customer satisfaction.
2. **Effective Communication -** A clear statement of requirements facilitates effective communication among the stakeholders of the system.
3. **Requirements Tracking -** Organized requirements help trace requirements evolution throughout the development life cycle and into maintenance.
4. **Reduced Project Cost Overruns and Schedule Delays -** Requirements Management reduces project cost overruns and schedule delays that are attributed to poorly identified or unaddressed requirements.
5. **Project Management Control -** For every organization striving to reach CMM level 2, or simply trying to improve the way they do business, Requirements Management is an indispensable Project Management control.
6. **Rapid Detection of Requirement Errors -** A Requirements Management system helps detect requirement errors, which avoids unnecessary costs associated with implementing the wrong requirements.
7. **Easy Software Maintenance -** By having documented requirements, it is easier to maintain the software.
8. **Project Control** - Requirements Management helps control large and complex projects.
9. **Project Direction -** Requirements Management provides direction for the project team, enables tracking of the project status through all its changes from beginning to end.
10. **Alignment of Business Objectives with Software Applications -** Requirements Management gives lasting value as it allows the alignment of business objectives with software applications.

1.2 Analyst Pro Users

The Analyst Pro tool has a number of time-saving features that make it useful for any company faced with identifying customer needs and implementing solutions to achieve customer satisfaction. Following is a list of professionals who are finding Analyst Pro to be particularly useful:

- **System Analyst** - Analyst Pro allows the System Analyst (SA) to capture and manage user business and project requirements for development, enhancements, and maintenance. It also enables the SA to prioritize and assign requirements to developers.
- **Software Developer/Programmer -** Analyst Pro helps Programmers translate requirements into design specifications (specs). It also enables Programmers to develop and document unit test cases for unit testing.

- **Project Manager/Team Lead -** Analyst Pro enables Program Managers (PMs) to track requirements that need to be met by a specific deadline or product release. It also allows PMs to assign work to programmers and testers.
- **Software Tester -** Analyst Pro enables Software Testers (STs) to validate the software to ensure it meets all of the user's requirements. Analyst Pro helps the STs derive test cases from the requirements and design specifications and to document test cases and results.
- **Technical Writer/Documentation Manager -** Analyst Pro enables technical writers to create, edit and manage requirements documents. The system's check-in/check-out feature enables writers to determine whether or not a document is checked-out, and if it is, by whom. This ensures that writers have access to the documents that they need when they need them. If a needed document is in use, the writer can simply send an e-mail (to the team member who has the document) asking to be notified when the document is returned. Furthermore, change management has never been easier. With the click of a button, a document can be reverted to the previous version.
- **Business Analyst -** Analyst Pro provides a Business (Process) Requirements module as well as all of the tools analysts need to create process documents, flow diagrams, and charts, and then manage those documents. Analysts can also use the Analyst Pro's Requirements Analysts features to perform requirements analysis tasks.

1.3 Analyst Pro Concept

Analyst Pro's Requirements Management Concept

Analyst Pro uses a simple yet sophisticated model for requirements management, diagrammed in *Exhibit 1*, in the section Analyst Pro Model. This model provides the base structure within which you can easily classify and link systems requirements. Each requirement may be identified and tracked by a set of attributes. Requirements may also be shared between different projects.

This section covers:

- Model Structure
- Requirements Attributes
- Sharing Requirements Across Projects
- Workflow Management

1.3.1 Overview

In Analyst Pro, requirements are classified into three main groups:

- **Application,**
- **Process or Business,** and
- **Design.**

Every requirement is managed using attributes and their values. Common attributes for the requirements of all the groups include *release, status, priority, author, type etc*. Values for these attributes are the same for every group, except for the attribute *Type* which allows classification by group.

Business requirements can be shared across projects by using the same *Process Requirements Keyword* for projects that need to share requirements.

Workflow management is possible by changing *Status* values.

1.3.2 Analyst Pro Model

For the purpose of managing requirements effectively through the system's life cycle, Analyst Pro classifies requirements into groups. Relationships among these groups allow you to trace requirements through the project life cycle. The Analyst Pro Model (*Exhibit 1*) shows relationships between design requirements, detail design specifications, and test plans.

Model Structure

- **Application Requirements Group -** This includes system level (global) requirements for the application. These requirements include performance, security, usability, standards, interfaces to external systems, etc.

  Example: *Every screen in the application shall have a status bar.*

- **Process (or Business) Requirements Group -** This includes requirements that belong to a business or process for which the software is being developed. It includes process or business needs and rules. This requirements group is independent of implementation technology.

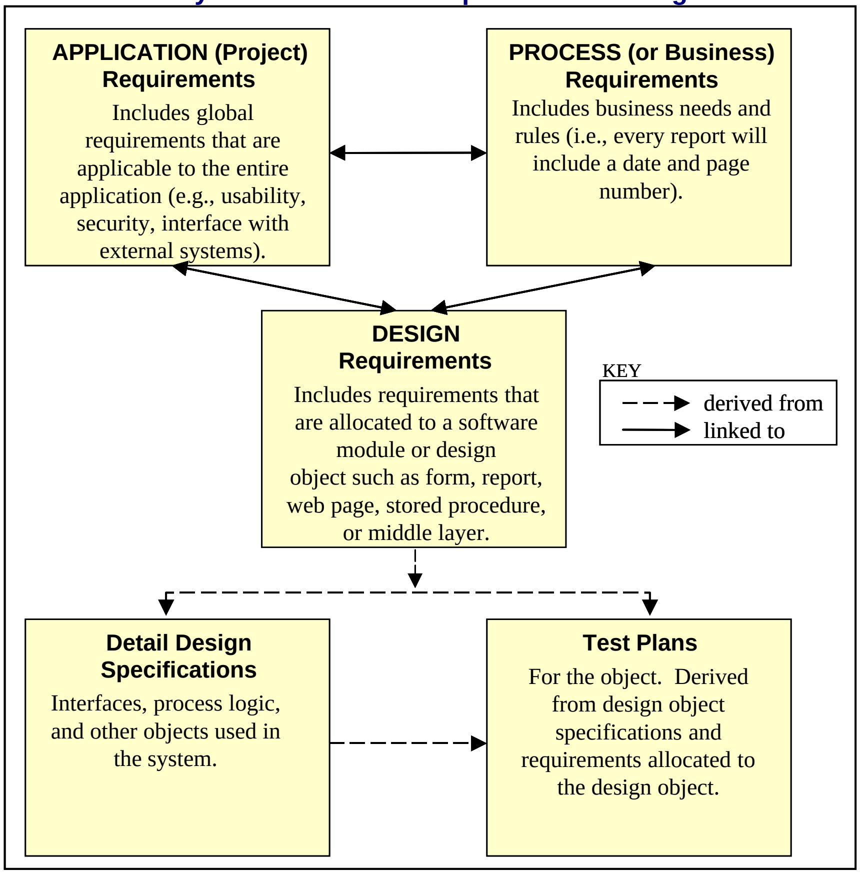
  Example: *Human resources personnel shall be able to retrieve and update employee data.*
  This example shows a business need that is to be met by the system.

  Example: *Only human resources, project managers, and vice presidents can have access to employee data.*
  This example is a business rule that constrains the system, not including such issues as usability requirements, performance, or interfaces with other systems.

- **Design Requirements Group -** This group includes application and process requirements that are linked to a design object (e.g., form, report, web pages, stored procedure, and class), and requirements that are specific to the design object.

  Example: *Employee information form (screen) will show an employee's hire date.*
  This requirement is specific to the design object *Employee Information* screen.

Exhibit 1. Analyst Pro Model for Requirements Management & Tracing



All application and process requirements are allocated to the design objects that satisfy those requirements. From these requirements, a detailed design specification for the object can be developed. Verification and validation of requirements can be achieved by test plans for design objects, which are derived from requirements and the object's detail design specification.

All requirements link within their own group.

1.3.3 Sharing Requirements Across Projects

If you wish to share business requirements across projects, use the same *Process Requirements Keyword* for projects that need to be shared. The purpose of this feature is to manage all business or process requirements with a single hierarchical structure. It makes business requirements independent of a particular project. Your organization can use multiple projects to satisfy all of your business requirements.

1.3.4 Requirements Attributes

Analyst Pro enables you to manage and trace requirements through the course of software development and maintenance.

Common attributes include *Requirement Tag, Release, Status, Priority, Author, Source, Source Notes, Parent Requirement Tag,* and *Type*. Each attribute has values, for example, the *Priority* attribute can be valued as high, medium, or low. Every requirement (or set of requirements) must be classified into any one of the previously defined groups, such as Application, Process (or Business), and Design Objects, and have attribute values set. See possible attribute values in *Exhibit 3*.

Default Attributes

The following attributes are provided by Analyst Pro by default:

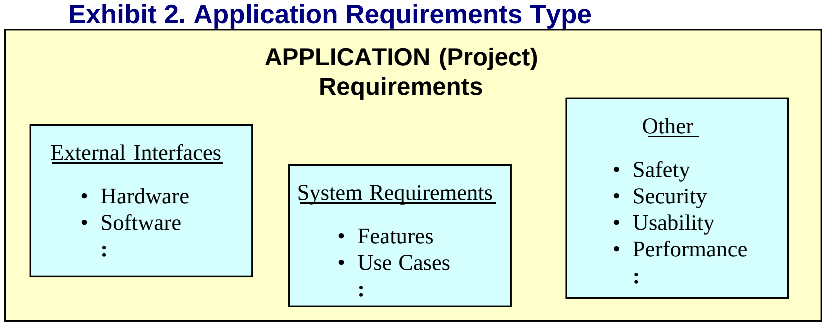
- **Tag:** Generated by the system, it uniquely identifies a requirement.
- **Release:** Tracks a generation or subset of requirements that are to be satisfied for a particular release.
- **Status:** Helps manage Workflow by tracking the preparation or completion state of requirements throughout the project life cycle.
- **Priority:** Allows the user to prioritize requirements.
- **Author:** Tracks changes by recording the name of the individual who adds or edits a requirement.
- **Source:** The origination of the requirement (e.g., customer request).
- **Notes:** Allows the user to fully describe the requirement's origination, purpose, or any other notes.
- **Parent Tag:** Owner of a lower level requirement or requirements. It can be used to link requirements of different groups, as well as the requirements of the same group.
- **Ref & Links:** This attribute contains references and links. *References* allows the user to associate requirements with diagrams and documents contained in Analyst Pro. *Links* allows the user to connect multiple requirements.

Type

Requirement Type allows you to classify requirements by group. Requirements can be effectively managed using the three main groups of requirement attribute types:

- **Application Requirement:** The Application Requirement type is a hierarchical structure as shown in *Exhibit 2.* The function types shown are the most commonly used; this category can contain many more types.
- **Process (or Business) Requirement:** The Process Requirement type is a simple list. The Process Requirement type includes needs, rules, or any other type related to a business or process.
- **Design Requirement:** The Design Object Requirement type is a simple list. This type includes all requirements that belong to a design object such as bug, cosmetic, usability, business requirement, etc.

Exhibit 2. Application Requirements Type



Some of these attributes can have default values. Setting default values for attributes optimizes the whole Requirements management process. The *Status* attribute value of a requirement changes through a project's life cycle, as is further discussed in the Workflow Management Section. All other attribute values of a requirement generally remain constant. To give you an idea about the range of possible attribute values, see *Exhibit 3*, below.

Exhibit 3. Attribute Values Table

Attribute	**Possible Values**
Release	1.0, 2.0
Status	Proposed, To be Determined, Approved, Rejected, Assigned, Testing, Manager Review, Finalized
Priority	High, Medium, Low Or Values (1-10)
Type	
Application	Standards, System Interface Requirements
Process (or Business)	Rule, Need, or any other Business or Process Requirement
Design Object	Usability, Bug, Cosmetic, Process (or Business) Requirement

1.3.5 Workflow Management

Analyst Pro enables effective management of project development work by assigning work by project. Work is managed using the attribute *Status* values. The Status attribute can have any of the following values, or any others predefined for your system's Workflow process:

- **Proposed**
- **To Be Determined**
- **Approved**
- **Rejected**
- **Assigned**
- **Testing**
- **Manager Review**
- **Finalized**

A typical scenario of Workflow Management with Analyst Pro is shown in *Exhibit 4*.

Exhibit 4. Typical Workflow Table

Status	Workflow Process
	Management approves a requirement, then sets status to "Approved."
Approved ↓	Manager or Analyst assigns work to a Programmer, then changes status to "Assigned."
Assigned ↓	Programmer completes work, then changes status to "Manager Review."
Manager Review ↓	Manager reviews work, assigns work to a tester, then changes status to "Testing."
Testing ↓	Tester completes work, then changes status to "Manager Review."
Manager Review ↓	Manager reviews the test results, then changes status to "Finalized."
Finalized	

While in *Manager Review* status, the manager can either assign work to a tester and change the status to *Testing*, or can change the status to *Finalized* to conclude the work.

Chapter II
Using Analyst Pro

2 Using Analyst Pro

This chapter covers the basics of using Analyst Pro:

- Getting Started lists the basic steps in setting up a project in Analyst Pro:
  - **Planning your project,**
  - **Logging into a new project,** and
  - **Logging into an existing project.**
- Accessing Modules guides you in how to access the main modules of Analyst Pro, whose functions are discussed in Analyst Pro Concept.
- Using Special Features introduces you to the special Spell Check feature, which allows you to maintain accuracy in term definition.
- Exiting Analyst Pro shows you how to close down a project and exit the system.

2.1 Getting Started

This chapter covers getting started with Analyst Pro.

Subsections here cover steps for *setting up Analyst Pro, planning your project, logging into a new project, logging into an existing project,* and *accessing different modules of Analyst Pro*.

2.1.1 Steps to Setting Up a Project

This section provides a complete list of the steps to be performed to set up a project in Analyst Pro. Included are all of the steps that are required as well as the steps that are optional. You may find this list of steps useful if you are a new Analyst Pro user.

Step 1 - Plan Your Project (Optional)
Planning your project, or readying your project for effective use in Analyst Pro, is the first step to using the tool. Although this step is optional, you will find that planning your project makes it easier to implement the project in Analyst Pro.

Step 2 - Log into a New Project (Required)
If your Analyst Pro project has not been created yet, you must first log into a new project to get started. The section titled "Logging into a New Project" provides the necessary instructions.

Step 3 - Add General Project Information (Required)

Step 4 - Add Project Attributes I (Required)
This step enables you to create attributes (such as status, priority, business requirement types, and design requirement types) for your project. Indicating Project Attributes I and setting default values enables you and your team to indicate the status of a requirement (i.e., whether it is in testing, being reviewed or completed). You can also indicate whether a requirement is a low, medium, or high priority.

Step 5 - Add Project Attributes II (Required)
This step enables you to create attributes such as release and requirements source. Indicating Project Attributes II and setting default values enables you and your team to quickly determine the release for which a requirement must be implemented (if applicable), as well as the source of the requirement (i.e., customer request, bug identified in testing, etc.)

Step 6 - Add Custom Attribute (Optional)
In addition to using Project Attributes I and Project Attributes II (mentioned above), if desired, you can specify your own attributes. This enables you to completely tailor Analyst Pro information to suit your project.

Step 7 - Set Project Options (Optional)

Step 8 - Create User Groups (Required for Security Reasons)

Step 9 - Add Users to the Project (Required if more than one person will use Analyst Pro)

Step 10 - Add Application Requirement Types (Required if creating Application Requirements)

Step 11 - Add Application Requirements (Required if implementing/analyzing Application Requirements)

Step 12 - Add Business (Process) Functions (Required if creating Business Requirements)

Step 13 - Add Business (Process) Requirements (Required if implementing/analyzing Business Requirements)

Step 14 - Create Object Groups/Modules (Required if creating Design Requirements)

Step 15 - Create Design Object(s) (Required if creating Design Requirements)

Step 16 - Create Design Requirements (Required if implementing/analyzing Design Requirements)

Step 17 - Create/Add Project Diagrams (Optional)
Although this step is optional, you should perform this step if you are generating *Project Diagrams*. Storing project diagrams in Analyst Pro ensures all project documents are easily accessible, and project information is safeguarded.

Step 18 - Set up the Repository (Optional)
Although this step is optional, you should perform this step if you want to ensure document changes are not accidentally overwritten. The Repository feature also enables users to quickly identify who is editing/updating a project document. In addition, it makes it very easy to locate project documents.

Once you have performed the applicable above steps, you may perform Requirements Analysis and/or Traceability Analysis tasks and Generate Requirements Documents/Reports.

2.1.2 Planning Your Project

Analyst Pro includes a number of new features aimed to allow project managers, team leads, and project members to efficiently interface with one another and track project documents.

However, before launching Analyst Pro, a project planning session should be coordinated to establish the following:

- **Identify the Analyst Pro System Administrator.** The should be able to read, create and delete documents. This person should also be responsible for managing user accounts/passwords, restoring deleted files, creating project folders for the Repository, and for backup system files.

  You should ensure this privilege is granted to someone who will carefully guard the project's files. If your company has a system administrator, you may consider using this person. Or, you may consider assigning one or two people to perform this task. When creating user groups, make sure that a System Administrator group is created; click on the applicable check boxes to ensure the administrator has full access, and assign the applicable user(s) to the System Administrator group. (See Creating User Groups and Adding Users for more details.)

- **Establish groups.** In addition to creating a System Administrator group, you will be tasked with creating other groups. You may want to discuss the additional groups that will be used in the project and determine the level of access each group will have. Ultimately, users will be assigned to each group, and will inherit the permissions of the group to which he/she is assigned. (For more information, see Creating User Groups.)
- **Determine the folders for the Repository.** Analyst Pro 4.0 includes a Repository that lets users import documents, and then use the **Check-in/Check-out** feature to access documents. The Repository maintains a change log for each document. Folders should be created in the Repository. It may be useful to identify a list of folders that should be created for the entire group. Each user can then place information into the existing folders instead of randomly creating folders at will. Identifying a folder structure for the Repository ensures the Repository remains manageable, organized, and easy to use. (For more information, see the section titled Repository.)
- **Determine your Project Attributes.** It may be useful to identify the project attributes that will be used. (For more information, see the section titled Adding Attribute Values.) You may want to identify the attributes that will be used and the values to be assigned to the attributes. In addition, Analyst Pro also enables users to create custom attributes, and then assign values to those attributes (see the section titled Adding Custom Attributes). You may also want to identify the custom attributes that will be used. A list can then be distributed to the team to ensure that all members understand when and how each attribute value should be applied. This will ensure the project is properly organized, and, as desired, meaningful reports can be generated based on the consistent use of the assigned attribute values.
- **Determine who will input the basic project information into the system.** Before Analyst Pro can be used, the basic project information (including attributes, values, general project information, user groups, and users) must be determined. Once this has been done, a team member can be assigned to input this basic information. The person assigned to perform this task will need to perform the steps in the following sections: Creating a New Project, Setting Project Options, Managing Attributes, Adding Users, and Creating User Groups.

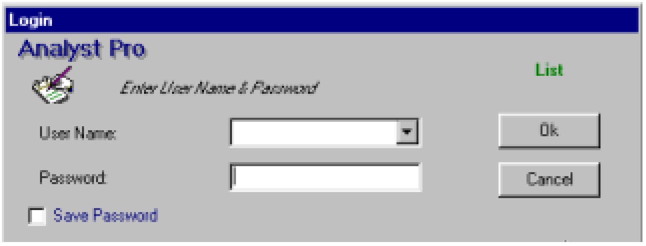
2.1.3 Logging Into a New Project

To Log In to a new project, perform the following sequence of steps:

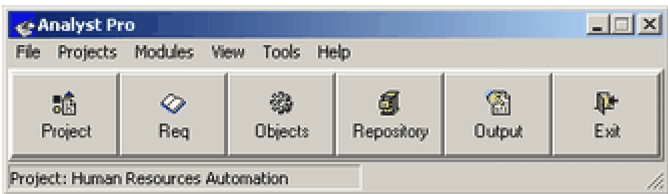
1. To run Analyst Pro from your desktop, double-click on the Analyst shortcut icon.

Or, in the absence of a desktop icon, click on your **Windows Start** button, select **Programs,** then select **Analyst Pro** from the list of programs, and then click on the **Analyst** icon listed.

The **Analyst Pro** splash window displays. Then the **Login** dialog, shown below, appears.



2. Click in the **User Name** field.
3. To start a new project, type **new**. You do not need a password for a new project.
4. Click on the **OK** button. The **Analyst Pro** Main Menu displays.



You may now enter the necessary information for your new project, if this has not previously been done. To add information to the project, see the section titled Creating a New Project.

See Also

Logging into an Existing Project

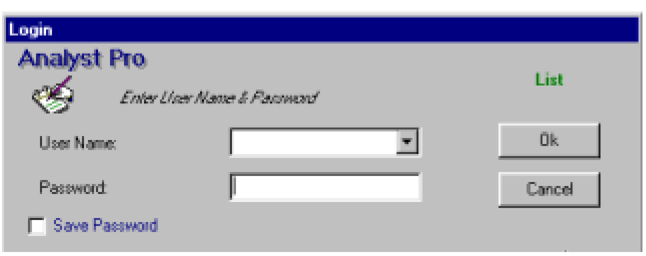
2.1.4 Logging Into an Existing Project

To Log In to an existing project, perform the following sequence of steps:

1. To run Analyst Pro from your desktop, double-click on the Analyst shortcut icon.

Or, in the absence of a desktop icon, click on your **Windows Start** button, select **Programs,** then select **Analyst Pro** from the list of programs, and then click on the **Analyst** icon listed.

The Analyst Pro splash window displays. Then the **Login** dialog, shown below, appears.



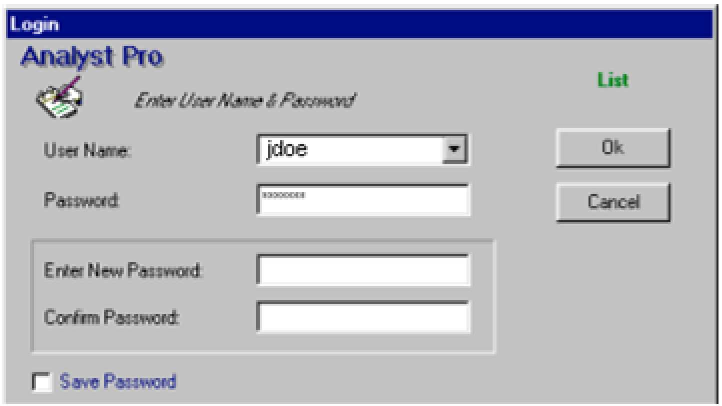
2. Click in the **User Name** field. Type your assigned user name.

*Note: If you clicked on the **Save Password** dialog when you logged in previously, the **User Name** and **Password** fields are automatically filled in.*

3. Click in the **Password** field. Type your assigned password.

4. If desired, click on the **Save Password** check box. (This prompts the system to store your password so you do not need to enter it the next time you log into Analyst Pro.)

5. If you are logging into the project for the first time, two additional fields appear on the **Login** dialog (as shown below).



To keep the password you are currently assigned, click in the **Enter New Password** field, and type your current password. Or, to change the password you are currently assigned, click in the **Enter New Password** field and type a new password. Then click in the **Confirm Password** field, and retype the password you typed in the **Enter New Password** field. Make sure you click on the **Save Password** check box if you want to store your password.

6. Click on the **OK** button. The Analyst Pro main menu displays, as shown below.

2.2 Accessing Modules

Modules in Analyst Pro comprise the categories of information that can be managed and stored in the course of project management. Analyst Pro provides a clear and user-friendly interface for accessing modules. Modules can be accessed using the *Modules Menu* from the Main Menu or *Buttons* from the Button Bar.

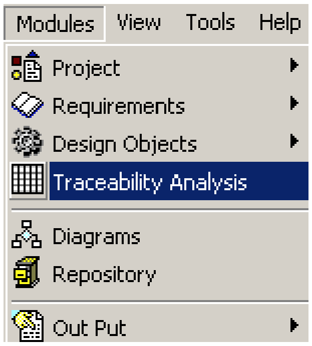
Analyst Pro offers the following Main Modules:

1. **Project**
2. **Requirements**
3. **Design Objects**
4. **Traceability Analysis**
5. **Diagrams**
6. **Repository**
7. **Output**

The above main modules contain sub-modules.

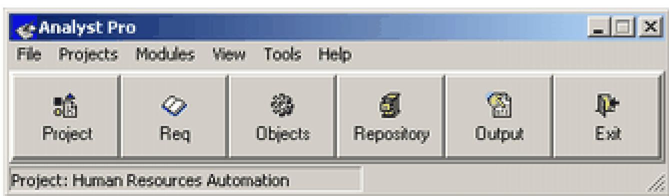
Using Menus

Modules can be accessed from the **Main Menu** by clicking on the option labelled **Modules**. The following **Modules Menu** will appear, from which you can select the module you want.



Using Buttons

Modules can also be accessed from the **Button Bar** which appears after you have loaded Analyst Pro. Select the module you want from the horizontal Button Bar and click on it to access.

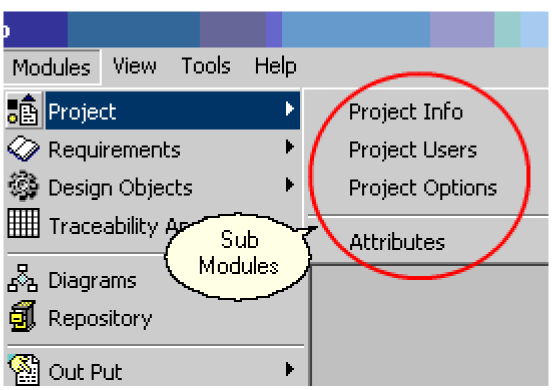


2.2.1 Accessing Project Module

The Analyst Pro **Project Module** includes the sub-modules: *Project Info, Project Users, Project Options and Attributes.*

Using Menus

Click on the appropriate **sub-module** to access that module.

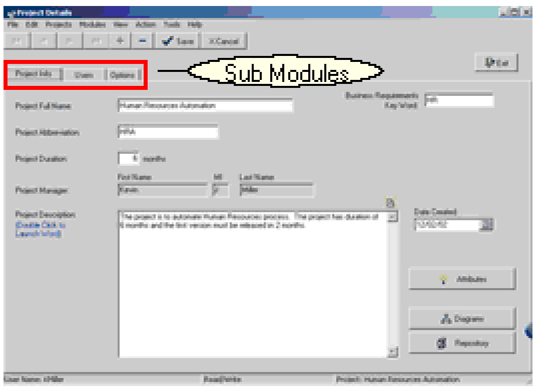


Using Buttons

1. Click **Project** on the **Main Menu**. Then the following screen appears:

2. To access a sub-module, click on the appropriate tab.

For instance, to access the **Attribute sub-module**, click on the **Attributes** button on the **Project Info** tab.



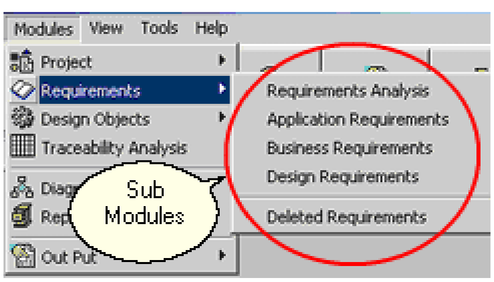
2.2.2 Accessing Requirements Module

The Analyst Pro **Requirements Module** includes the sub-modules: *Requirements Analysis, Application Requirements, Process/Business Requirements, Design Requirements, and Deleted Requirements.*

Using Menus

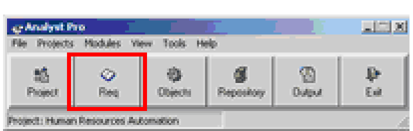
Click on the appropriate **sub-module** to access that module.

*Note: The **Deleted Requirements** sub-module is accessible only by menu.*

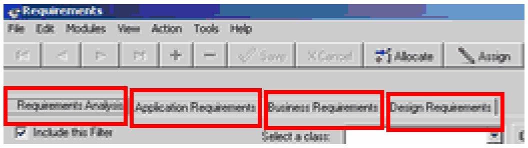


Using Buttons

1. Click on the **Req** button on the **Main Menu**. This launches the **Requirements** module.



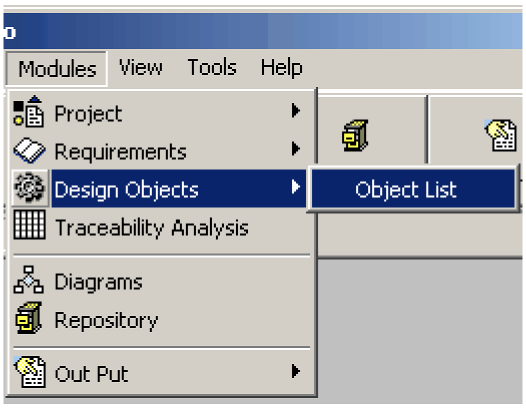
2. Click appropriate **tabs** to access the sub functions.



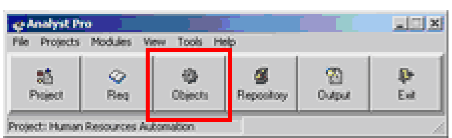
2.2.3 Accessing Design Objects Module

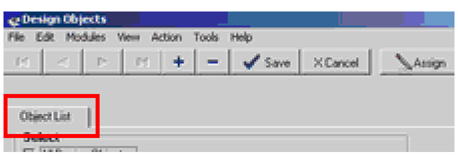
The Analyst Pro **Design Objects Module** includes the sub-modules: *Design Object List, Design Object Details (by option), and Spec & Test Plans (by option).*

Using Menus



Using Buttons

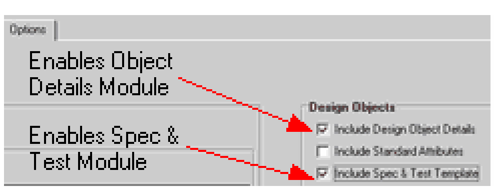




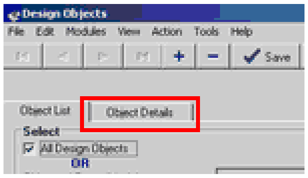
Accessing Optional Sub-Modules

Design Object Details:

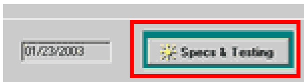
1. Go to **Project Options**.
2. Select the **Object Details** option.



3. Go to the **Object** module where the **Object Details** tab appears.
4. Access **Object Details** by clicking on the **Object Details** tab.



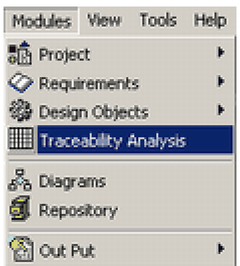
5. Access The **Spec & Testing** module by clicking on **Specs & Testing**.



2.2.4 Accessing Traceability Module

The **Traceability Analysis Module** can be accessed using the **Modules Menu**.

Using Menus



Click on the **Traceability Analysis** menu option.

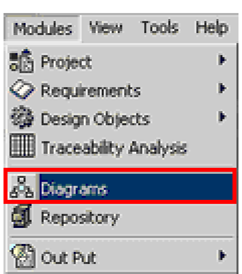
Using Buttons

The **Traceability Analysis** module can be accessed by clicking on the **Traceability** button in the requirements analysis sub-module.

2.2.5 Accessing Diagrams Module

The **Diagrams Module** can be accessed using the **Modules Menu** and the **Button Bar**.

Using Menus



Click on the **Diagrams** menu option.

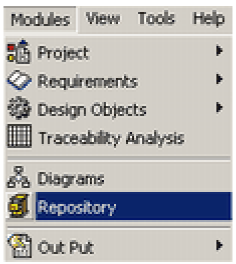
Using Buttons

Diagrams can be accessed by clicking on the **Diagram** button  in any module.

2.2.6 Accessing Repository Module

The **Repository Module** does not have any sub-modules, and can be accessed directly from the **Modules menu** or from the **Button Bar**.

Using Menus



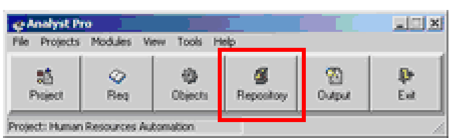
Click on the **Repository** menu option.

Using Buttons

Click on **Repository** on the **Main Menu.**

OR

Click on the **tool bar** button  in any module.

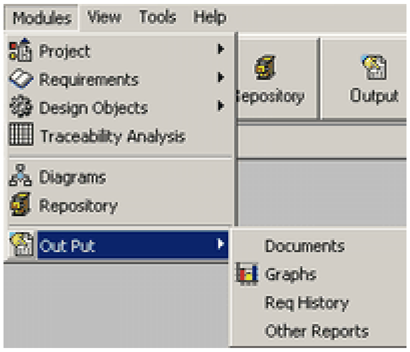


2.2.7 Accessing Output Module

The Analyst Pro **Output Module** includes *Documents, Graphs, Req History,* and *Other Reports*. All sub-modules can be accessed using the **Modules Output menu**.

Using Menus

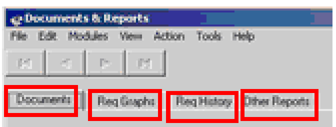
1. Select **Modules**. Then click on **Output** and make the requisite sub-module selection.



Using Buttons

1. Click on the **Output** button on the main **Button Bar**.

The following sub-module Button Bar appears:



All sub-modules can be accessed by clicking on the appropriate **tab** as shown in the above figure.

2.3 Using Tools & Special Features

Analyst Pro has several special features to help you optimize project management. Analyst Pro also provides tools for your convenience. Unique among these is the *Spell Check* feature, very similar to industry word-processing spell checkers, which allows users to check spellings for accuracy while making entries. Performing Spell Check details how to use the *Spell Check* feature.

Tools features include the following:

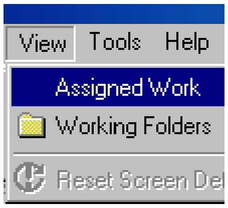
- **Send Email** allows you to send email without leaving Analyst Pro.
- **DB Structure** allows you to view database structure.

2.3.1 Creating Working Folders

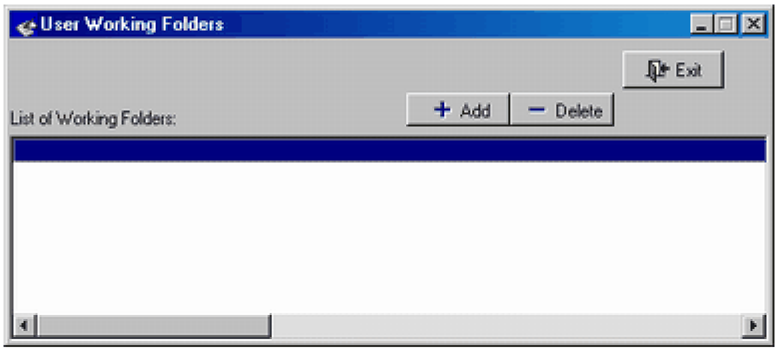
Every user can create working local folders to easily save files generated in Analyst Pro. This is useful when using the Repository feature and when generating requirements documents.

To Create Working Folders

1. Click on **Working Folders** in **View** menu.



2. The following screen appears:



3. Click the **Add button**  to add a folder.

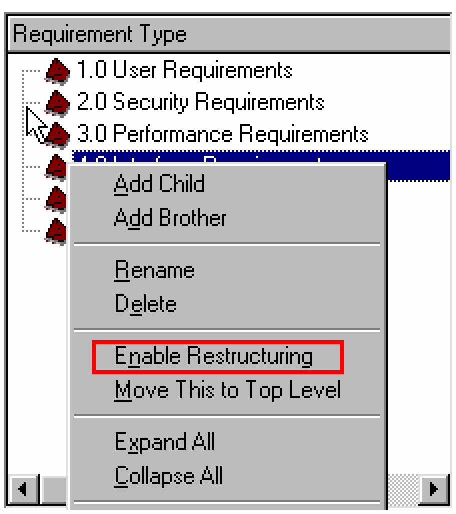
4. Click **Delete** to delete the Working Folder from the list.

2.3.2 Restructuring Trees

This topic covers how to *rearrange a tree* after it is built. This is useful to rearrange the *Requirements Types of Application Requirements, the Functions of Process Requirements, the Groups/Modules of Design Requirements, the Folders in the Repository Module* and the *Diagrams List in the Diagrams Module*.

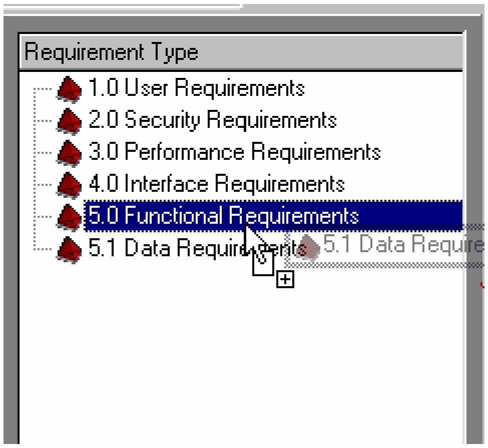
To Restructure Trees

1. To rearrange a tree, right click on the **tree** to bring up a pop-up menu.

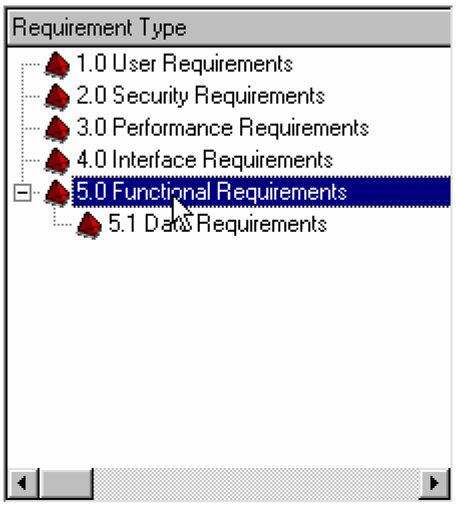


2. Click on **Enable Restructuring** on the tree to check it.

3. Select any **node** in the tree that you want to move, and drag and drop to the child of any other node.

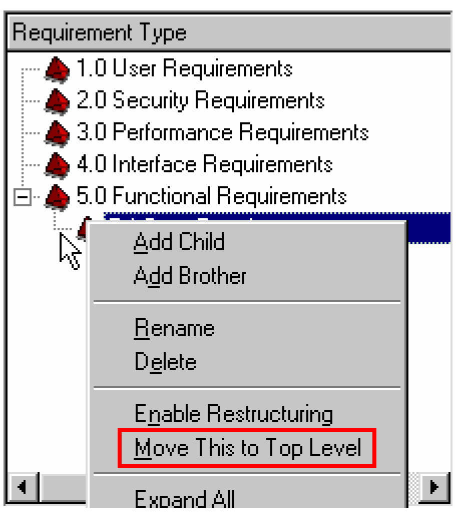


The following rearranged tree appears:



4. To make a node a top-level node (not as child to other nodes), follow the steps below:

   i) Select a **node** that you want to make top-level and right click on it.



   ii) Click on **Move This to Top Level**. That makes your selected node the top-level node.

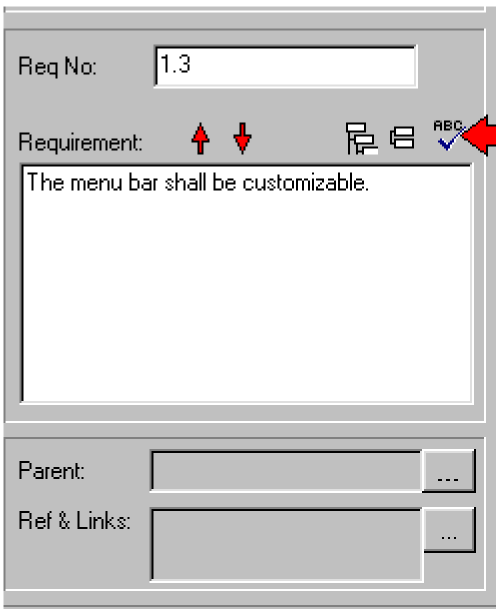
*Note: To rearrange requirements trees, follow earlier steps. Requirements can be rearranged automatically (no need to explicitly check **Enable Restructuring**).*

2.3.3 Performing Spell Check

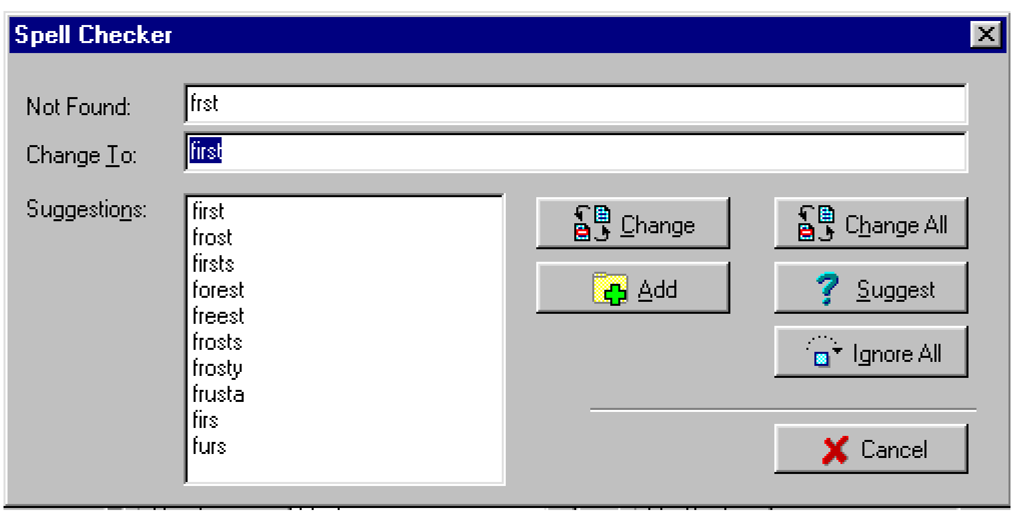
Inputting accurate information into Analyst Pro ensures that everyone clearly understands the information stored. A crucial part of this includes ensuring the information is spelled correctly.

Throughout Analyst Pro, you will see the *Spell Check* button clearly displayed--an icon with the letters **ABC** and a check mark below it (shown below).

1. Anytime you want to check the spelling of the information you have just entered, click on the **Spell Check** button.



2. If Analyst Pro finds spelling errors, the **Spell Checker** window displays.

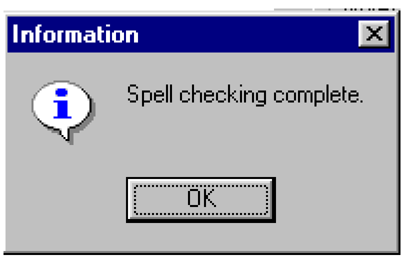


Click on the option you want as follows:

- **Change** - Click on this button if you want Analyst Pro to change the word in the **Not Found** field to the word in the **Change To** field. You may either accept the word Analyst Pro enters in the **Change To** field. Or, you may click on a word in the **Suggestions** field and then click on the **Change** button. Or, you may type a word in the **Change To** field and then click on the **Change** button.

- **Add** - Click on this button if you want the word in the **Not Found** field added to the Analyst Pro dictionary.
- **Change All** - Click on this button if you want every occurrence of the word in the **Not Found** field changed to the word in the **Change To** field. You may either accept the word Analyst Pro enters in the **Change To** field or you may click on a word in the **Suggestions** field and then click on the **Change All** button. Or, you may type a word in the **Change To** field and then click on the **Change All** button.
- **Suggest** - Click on this button if you want Analyst Pro to provide a list of words that are similar to the word in the **Not Found** field.
- **Ignore All** - Click on this button if you want Analyst Pro to ignore every occurrence of the word in the **Not Found** field and continue the spell check.
- **Cancel** - Click on this button to cancel the spell checker.

Once all errors have been addressed, the **Information** dialog displays as shown below, informing you the spell check is complete.



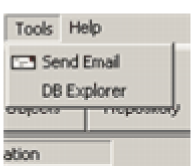
3. Click on the **OK** button to close the **Spell Check** feature.

2.3.4 Send Email

You can send Email from Analyst Pro.

To Send Email

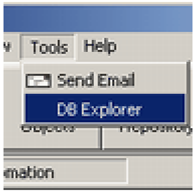
From the **Tools** menu, click on **Send Email** which launches your default email programs.



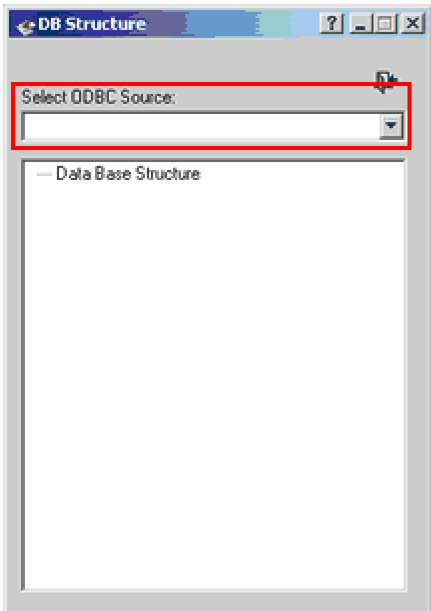
2.3.5 DB Structure

You can outline your database structure from Analyst Pro by performing the following sequence of steps:

1. From the **Tools** menu, select **DB Explorer**.



2. The following screen appears:



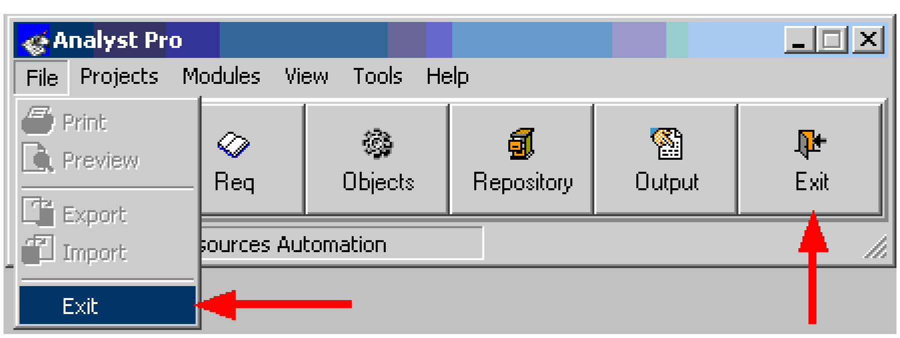
3. Select the source from the drop-down menu.

Note: This function requires an ODBC Data Source/driver. For information on creating ODBC, contact your System Administrator or visit Microsoft's website.

2.4 Exiting the System

You can exit Analyst Pro at any time.

1. To exit, select **File** from the **Main Menu**. The **File** Menu appears. Then select **Exit**. Or, click on the larger **Exit** button on the **Main Menu**.



2. The system exits and any open Analyst Pro window is closed.

Chapter III
Managing Projects

3 Managing Projects

This chapter covers the fundamentals of managing projects. Managing Projects in Analyst Pro can mean managing a single project or simultaneously managing several projects.

Projects in Analyst Pro represent the fundamental building blocks of requirements analysis. Before utilizing Analyst Pro's special features of requirements analysis or Repository storage, you will first have to create a project.

Separate sections provide detailed information on working with a single project and with multiple projects.

- Working with a Single Project covers creating a new project, recording information about the new project, setting the project options, and deleting a project, if necessary.

- Working with Multiple Projects covers the basics of sharing requirements and attributes across projects, switching from one project to another, and setting up a group of user names (for a single user) in order to work easily on multiple projects.

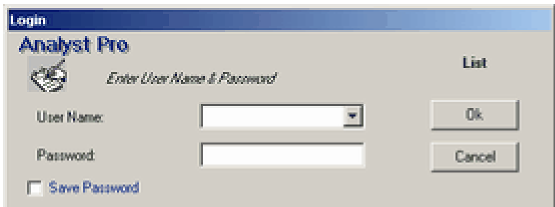
3.1 Working with a Single Project

This section covers the basics of creating a new project, setting project options, and deleting a project.

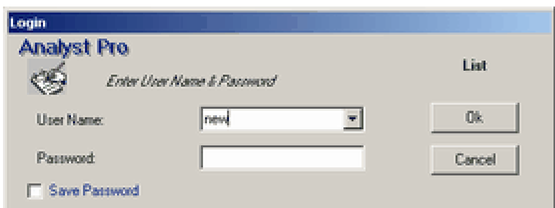
3.1.1 Creating a New Project

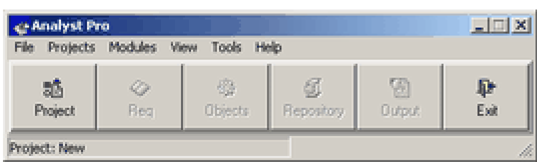
To create a new project in Analyst Pro, perform the following sequence of steps:

1. To log in first, click on the **Analyst Pro** icon on your desktop to login.
   The **Login** window will appear and prompt you for your **User Name** and **Password**.

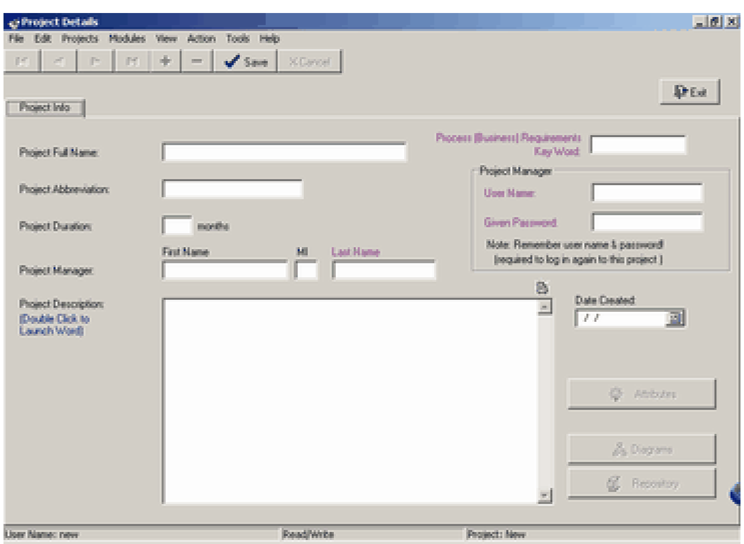


2. To create a new project, enter **new** in the **User Name** field.
3. Click on **OK.** The **Analyst Pro** screen will appear, as shown below.





4. Click on the **Project** button. The **Project Details** screen appears.
5. Enter detailed project information into all of the required (purple) fields. This information defines and describes your project, and allows you to record pertinent details such as the name of the project manager associated with this project. When you are done, click on **Save**.



*Note: **Process Requirements Key Word** - Click in this field and type a keyword for your Process (Business) Requirements. As you create new projects, you can prompt Analyst Pro to* *automatically incorporate the Business Requirements you create in one project into another project by simply using the same keyword.*

For example, if you type HR in the Process Requirements Key Word field for this project, you can then type HR in the Process Requirements Key Word field of any other project you create. This Process (Business) Requirements will then be shared by all projects with the same Process Requirement Key Word. This approach enables you to manage all business, or process requirements, with a single hierarchical structure. It also makes business requirements independent of a particular project and it enables you to share common Process (Business) requirements across multiple projects.

3.1.2 Setting Project Options

Analyst Pro 4.0 offers powerful project management options. Some of these are compatible with the previous version of Analyst Pro. Project options can be accessed from project modules, and are described below:

1. **Force Req Reason:** This option can be used to require the user to record a requirements change reason.
2. **Rename Classes:** This option can be used to customize class names. For example, *Process Requirements* can be renamed as *Business Requirements.*
3. **Design Requirements Attributes:** This option makes additional attributes available for the Design Requirements class. This option has been provided to allow for old-version compatibility. It is recommended that you do not use this option except for that purpose. Instead, we recommend that you use the **Custom Attributes** option to add in further requirements attributes.
4. **Design Objects:** This option allows you to provide additional optional features for your design objects.

   Include Design Object Details enables the **Design Object Details** sub-module. This allows you to track object details, and link objects to other objects and references.

   Enable Standard Attributes allows you to add attributes priority, release, and status attribute for design objects.

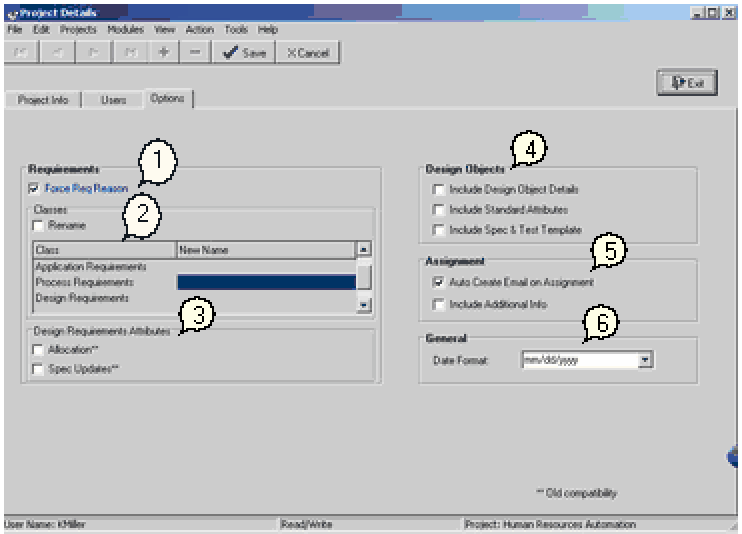
   Include Spec & Test Template enables **Spec & Test Plan** modules.

5. **Assignment:** This option allows you to assign work to users.

   Auto Create Email on Assignment generates email upon assignment of work to users. This option is defaulted to True.

   Include Additional Info allows you to include estimated hours, actual hours, and production date attributes on the assignment screen.

6. **General:** This date field is used to customize the display of the date format.
   The allowed formats are *mm/dd/yyyy, dd/mm/yyyy, yyyy/mm/dd.*

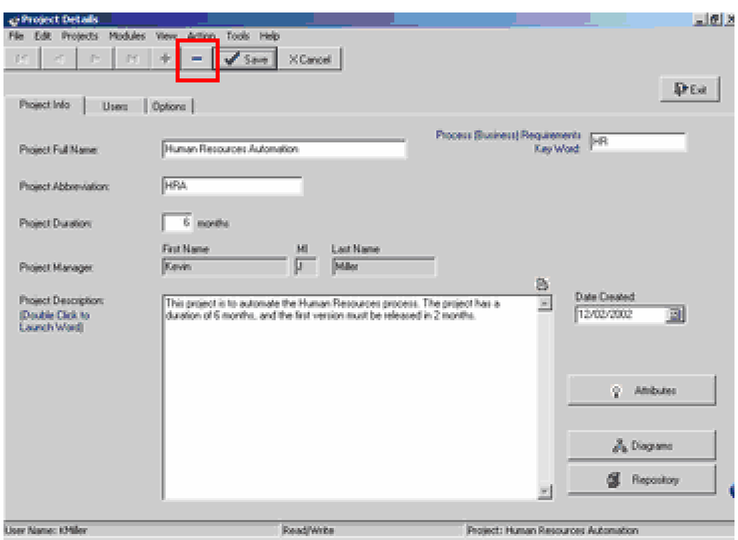


3.1.3 Deleting a Project

Please ensure that you really need to delete a project before proceeding. Note that deleting a project is a two-step process. After the first step, you can still choose to undelete the project.

You can also, choose, at that point, to purge the project, which fully deletes it. Details on purging the project may be found in the section Database Administration.

1. To delete a project, access the **Project Details** module. When Project Info is active, then click on the **Subtract** button . This is the first step in deleting the project.



*Note: The deleted project is not fully deleted from the system. It can be undeleted or purged using **Analyst Pro DB Manager**. Refer to the section Database Administration for details on purging and on undeleting the project.*

3.2 Working with Multiple Projects

This section covers topics useful while working with multiple projects:

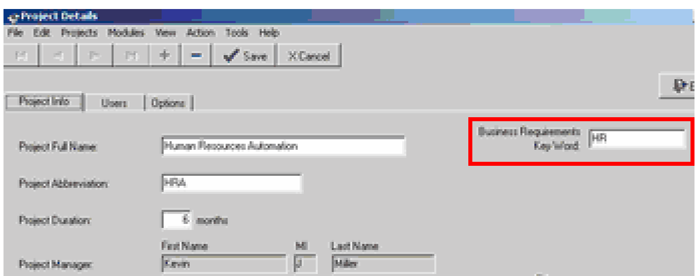
- **Sharing Requirements across Projects**
- **User Names List**
- **Switching Projects**
- **Importing Attribute Values**

3.2.1 Sharing Requirements

Sharing Requirements Across Projects

If you want to share business requirements across projects, use the same *Process Requirements Keyword* for the projects that need to be shared.

The purpose of this is to manage all business or process requirements with a single hierarchical structure. It makes business requirements independent of a particular project. Your organization can use multiple projects to satisfy all of your business requirements.



If the same process requirements keyword is used, the requirements of process class will be shared across projects.

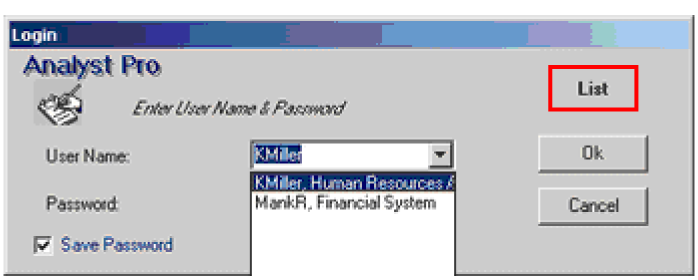
3.2.2 User Names List

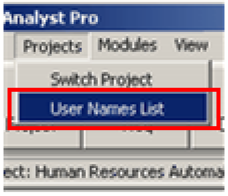
Analyst Pro allows users to work on more than one project. But the tool forces the use of different user names for different projects. To ease the task of remembering all the user names and passwords and easily navigate projects, Analyst Pro allows users to manage a list of user names.

To Create User Names List

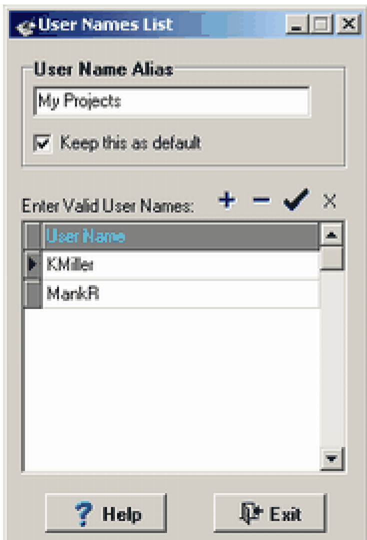
You (or the system administrator) can create a **User Names List** that will appear on the drop-down menu shown in the **Login** screen.

1. Click on the **List** button, which launches the **User Name List** window. Alternatively, click on the **Projects →User Names List** menu.





2. Enter a **User Name Alias** using a standard naming convention (chosen by the user). Every list should have an alias name that can be easily remembered.



3. Enter all **User Names** to be associated with this Alias.

4. Click the **Exit** button when you have entered all the names desired.

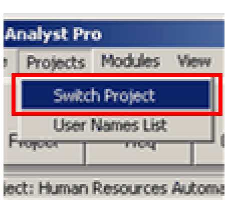
5. Click the **?** button if you need online help.

Note: User Names are case sensitive. Enter only valid user names into the list.

3.2.3 Switching Projects

To Switch to Other Projects

1. Click on the **Projects** menu from the **Analyst Pro** Main Menu when you want to switch projects.
2. Select **Switch Project**. The following screen appears:



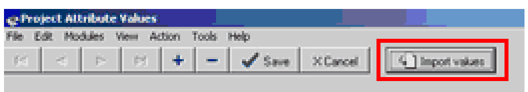
3. Select the project to switch to if you have created the **User Name List.** Otherwise, enter **User Name** and **Password** for the project you wish to switch to.

3.2.4 Importing Attribute Values

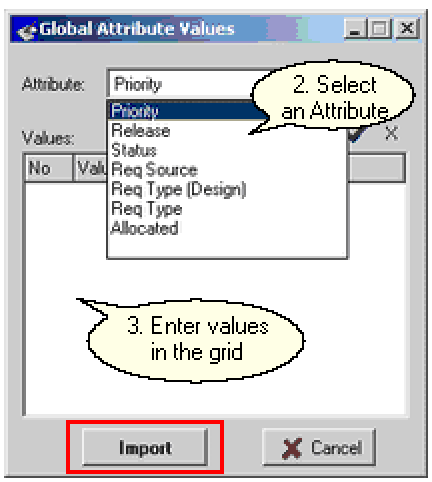
You may some times need to share attribute values across projects. Use the instructions below for this purpose.

To Import Attribute Values

1. Select the **Import Values** tool bar button from the Attributes sub-module. The following screen appears:



2. Select an **Attribute** from the list.
3. Enter **values** for that attribute in the grid.
4. Once values are added, they can be imported to any project by clicking on the **Import** button.



Chapter IV
Managing Users

4 Managing Users

This chapter covers the fundamentals of managing users. Managing users in Analyst Pro can mean adding new users, creating user groups, deleting users, or re-setting user passwords.

Users in Analyst Pro represent the many members of a software development team working on any given project. Most projects demand the contributions of many people simultaneously (team work). Analyst Pro streamlines Requirements Management to allow team members to work simultaneously and seamlessly on single or multiple projects.

Separate sections provide detailed information on different aspects of managing users:

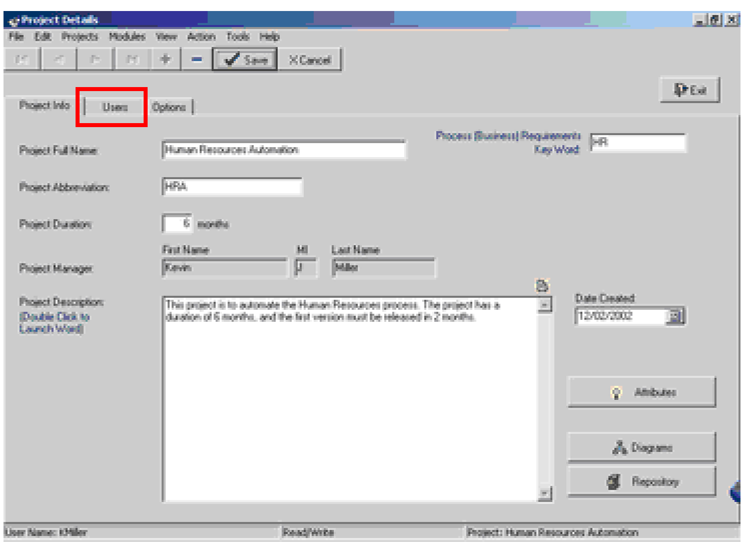
- Adding Users covers adding new users to a project.
- Creating User Groups covers the creation of specific user groups with similar Read, Read/Write, or Write privileges, in order that their use of various modules may be pre-set.
- Deleting Users covers the removal of old users from the system.
- Resetting User Passwords covers the ability of the administrator to reset passwords for users in case users forget their passwords.

4.1 Adding Users

To add a new user to the team, follow the instructions below:

To Add a User

1. Click on **Users** in the project module. The **Users** tab appears with the Project Manager in the **Users** grid.

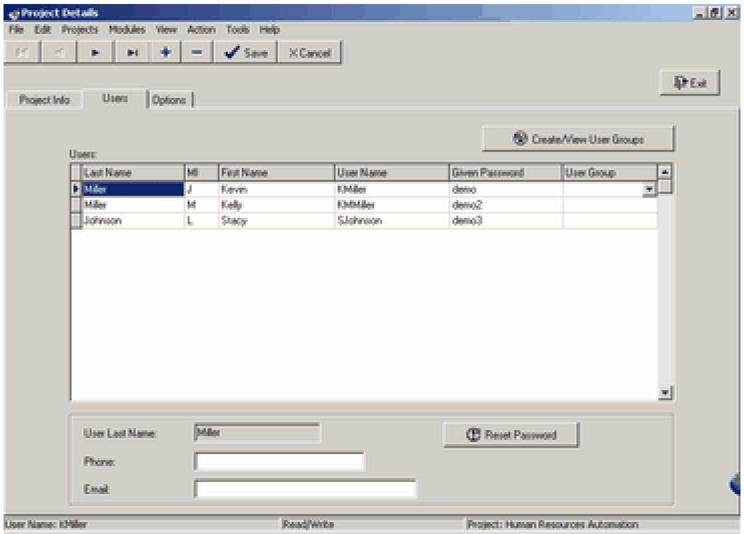


2. Click **+**. A new row appears in the grid.

3. Enter **User Information**.

Optional: Click **+** to add another user.

4. Click on **Save**.



*Note: Each user must be given a unique **User Name.***

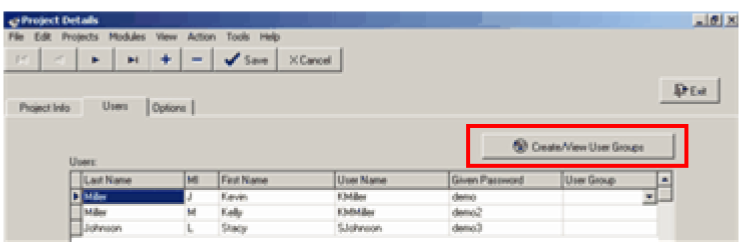
*Note: Each user must be attached to a **User Group** with the exception of the project manager. Managers by default always have full access privileges, therefore, they do not need to be added to a group.*

4.2 Creating User Groups

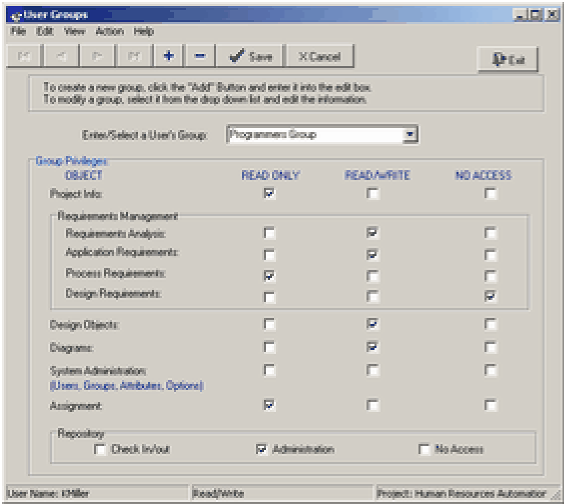
Analyst Pro allows you to create different user groups with different sets of privileges (*Read, Read/Write*, and *No Access*). These groups allow you to control users' access to the different modules of the application.

To Create a User Group

1. Click on **Create/View User Groups**. The **User Groups** screen appears.



2. Click . The **Enter/Select a User's Group** field is activated.
3. Enter or select the **User's Group Name.**
4. In the **Group Privileges** group box, select Object privileges.



To delete a users group, select the **User's Group** from **Enter/Select a User's Group** list box and click on the **Subtract button** .

Notes: You may want to plan the groups that will be used in your project as well as the permissions each group should have. Once you have developed a plan you can then implement the plan in Analyst Pro.

To safeguard your project information, you may consider providing users only with the access they need. For example, if you want team leads alone to create requirements to ensure only valid requirements are entered into the system, you can create a Team Leads group and give the group Read/Write access for all of the options under Requirements Management. You could then create a Developers' group and provide Read Only Access under Requirements Management for that group.

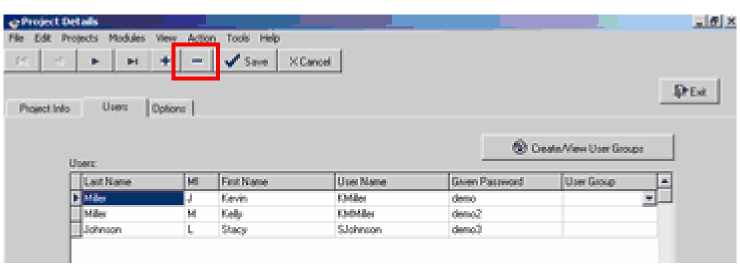
The flexibility provided through Analyst Pro enables you to tailor User Groups to suit your project.

4.3 Deleting Users

To delete a user from the team, follow the instructions below:

To Delete a User

1. Select a **User** from the list.
2. Click on the **Subtract** button .

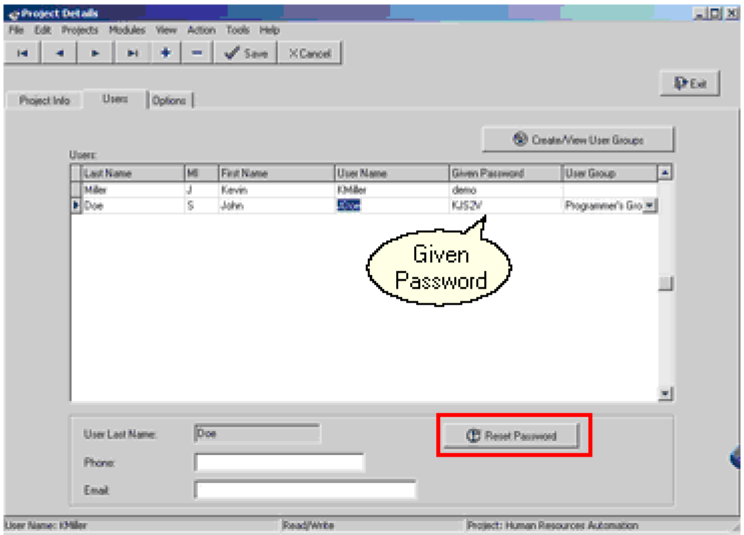


Note: Project managers cannot be deleted from projects.

4.4 Resetting User Passwords

When a user is added to the project, he should be provided a unique user name and given a password. Users can then login into project using the user name and password. They can change passwords when logged into the system.

If a user forgets his or her password, administrators can reset it using the **Reset Password** button.



Chapter V
Managing Requirements

5 Managing Requirements

This chapter covers the fundamentals of managing requirements. Managing requirements in Analyst Pro can mean setting up application, process/business, or design requirements, linking requirements, working with requirements, working with the requirements list, managing requirement change, engaging in traceability analysis, assigning requirements to team members, and managing attributes.

Analyst Pro simplifies the Requirements Management process by tracking requirements throughout the life cycle of the project. Higher level requirements that include User, System, Interface, and Business Requirements are classified into two groups, *Application* and *Process or Business Requirements.* Lower level requirements that comprise *Design Requirements* are related to the components of the software or product. Analyst Pro allows automatic allocation of higher level requirements to lower level components using the *Allocation* process.

Separate sections provide detailed information on different aspects of managing requirements.

- Setting Up Requirements covers the basics of setting up and working with application requirements, process or business requirements, and design requirements.
- Linking Requirements covers the basics of allocating requirements to design objects, internally linking requirements, and linking requirements to Repository files or diagrams.
- Working with Requirements covers how to import requirements, navigate through requirements, print requirements, find requirements, and view deleted requirements.
- Working with Requirements List covers how to make changes to a list of requirements, including how to update attribute values for a set of requirements, filter and group with attribute values, export to Excel and other formats, and activate and de-activate requirements.
- Requirements Change Management covers the automatic recording of change, how to switch between requirement versions, and how to force a reason for a requirement change.
- Traceability Analysis covers traceability features that enable you to study the impact of requirements change.
- Requirements Workflow covers the assignment of requirements to team members, and the viewing of assigned requirements.
- Managing Attributes covers how to set up and manage standard and custom attributes for requirements.

5.1 Setting up Requirements

This section describes how to set up and work with each of the three basic kinds of requirements:

- Application Requirements,
- Process or Business Requirements, and
- Design Requirements.

5.1.1 Application Requirements

Analyst Pro offers several sophisticated features to set up and use application requirements.

There are two steps involved in creating **Application Requirements:**

1. Add Requirement Types. This is covered in Working with Requirement Types.
2. Add Requirements. This is covered in Working with Requirements.

5.1.1.1 Working with Requirement Types

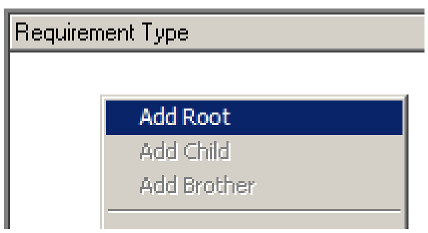
Before working with application requirements, plan and build your application requirements hierarchy (Req Type attribute) using the tree structure.

Application requirements types (See Exhibit 2. Application Requirements Type) include design standards, interfaces with other systems, environmental requirements, operating system requirements, etc.

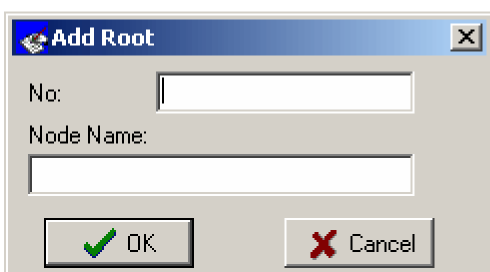
Refer to Exhibit 3. Attribute Values Table for possible values for the requirements attribute types available.

To Build a Requirement Type

1. Right click in the **Requirement Type** field. A Pop-Up menu appears.

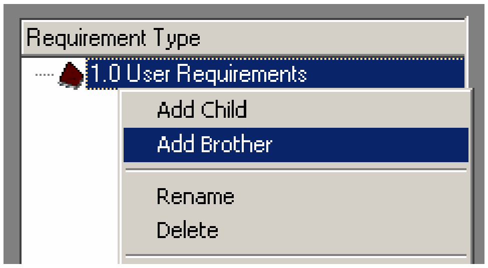


2. Click on **Add Root**. The **Add Root** window appears.
3. Enter a **Number (No.)** and a **Node Name** for the requirement type.
4. Click on **OK.** The requirement type is added to the **Requirement Type** field.

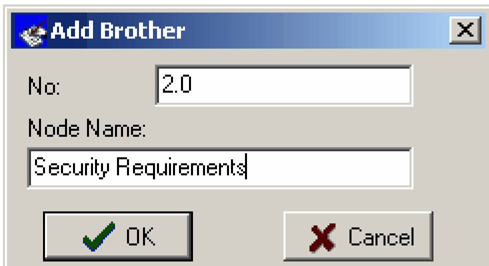


To Add More Requirement Types

1. Right Click in the **Requirement Type** field. A Pop-Up menu appears.



2. Select **Add Child** or **Add Brother.** The **Add Child** or **Add Brother** window appears.



3. Enter a **Number (No.)** and a **Node Name** for the Requirement Type.

4. Click OK. The Requirement Type is added to the **Requirement Type** field.

*Note: To Rename a Requirement Type, highlight the type and right click. Select **Rename**, and enter a new name for the requirement type.*

*Note: To Delete a Requirement Type, highlight the type and right click. Select **Delete**, and confirm your deletion.*

5. To Rearrange Requirement Types, refer to the section Restructuring Trees.

5.1.1.2 Working with Application Requirements

Analyst Pro provides many features for working with requirements, including *adding hierarchical (Child and Brother) requirements, deleting, and modifying requirements*. You can also *link requirements to each other, assign requirements to team members, and reference requirements to diagrams and files stored in the Repository*. Each of these options is covered below.

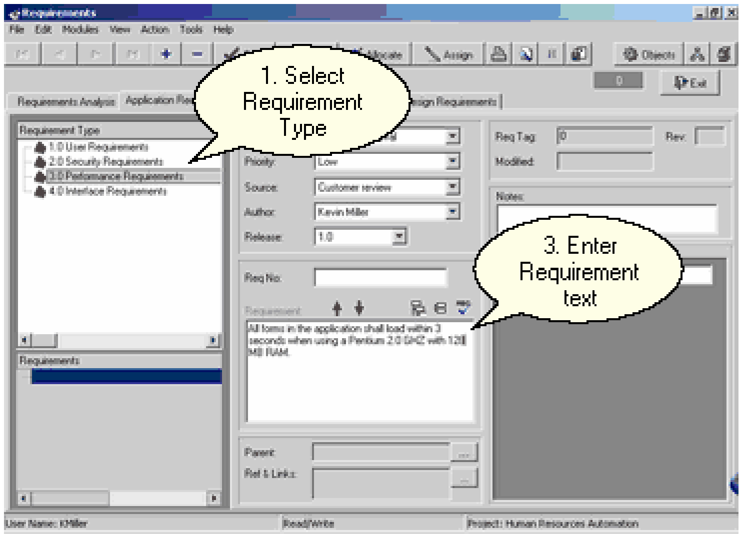
Note: Analyst Pro allows the user to import requirements from documents. This is covered in the section Importing Requirements.

To Add Requirements

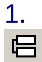
1. Select the **Requirement Type** for which you want to add a Requirement.

2. Click the **Add** button . The **Requirement** field is activated.

3. Enter the information for the Requirement. Click **Save**. The Requirement is saved to the **Requirement Type**.

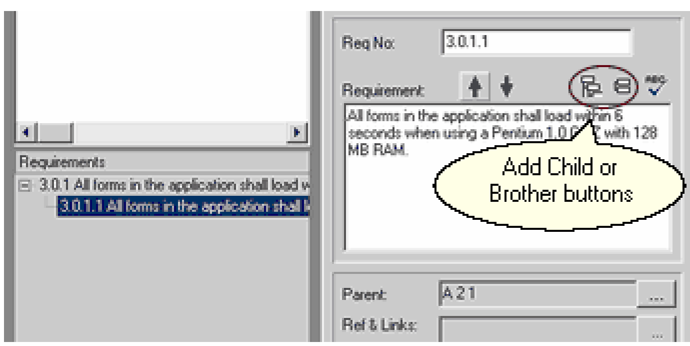


To Add a Child or Brother Requirement

1. In the **Requirement field,** select a **Requirement** and click  to add a **Child Requirement,** or  to add a **Brother Requirement**. The **Req No.** field is activated.

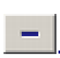
2. Enter the **Requirement Number.** Press **Tab**.

3. Enter the information for the Requirement. Click **Save**. The Requirement is saved to the **Requirement Type**.



To Delete a Requirement

1. Select the **Requirement** you want to delete.

2. Click . Confirm your deletion, and the Requirement is deleted for the Requirement Type.

To Modify a Requirement

1. Select the **Requirement** you want to modify.

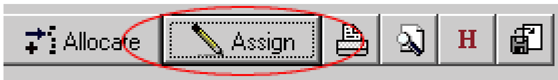
2. Make the necessary changes and click **Save**. The changes to the Requirement are saved.

*Note: To cancel the changes, click **Cancel.***

Note: To Spell Check your requirement at any time, click .

To **Link Requirements** to each other, Diagrams, or Files, select the **Requirement** and click the **Ellipsis (...)** button.

To Assign Requirements to Team members, select the **Requirement** and click **Assign**.



To Allocate Requirements to Lower Level Components (design objects), select the **Requirement** and click **Allocate**.

5.1.2 Process or Business Requirements

Process or Business Requirements may be made applicable to a single or multiple projects, and comprise all requirements related to the business processes behind the construction of a system.

These requirements permit you to manage business goals, needs, and organizational requirements. In Analyst Pro, this class of requirements provides a powerful mechanism to share requirements across projects, update requirements, and maintain an updated, real-world version of requirements as business processes in the real world evolve.

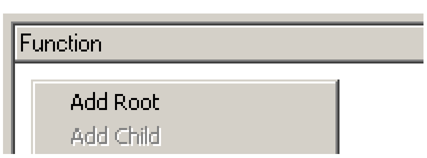
This class of requirement also allows you to maintain pre-set standards for requirements development. For example, if you have organizational standards for software development, you could use this class to store and track requirements.

5.1.2.1 Working with Functions

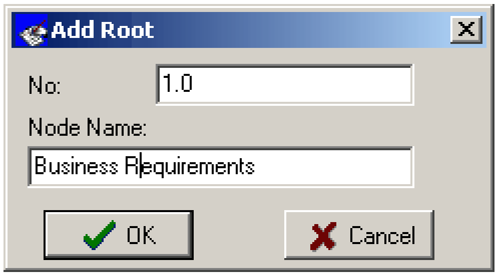
Before working with *Process Requirements,* plan and build your *Process (Business) Requirements Hierarchy* (Function attribute) using the tree structure. Functions include business requirements, organizational standards, or other requirements global to more than one project.

To Build a Function

1. Right click on the **Function** option. A Pop-Up menu appears.

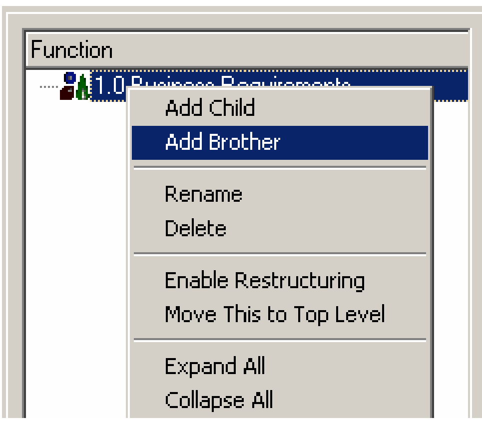


2. Click **Add Root**. The **Add Root window** appears.
3. Enter a **No.** and a **Node Name** for the function.
4. Click OK. The function is added to the **Function** field.

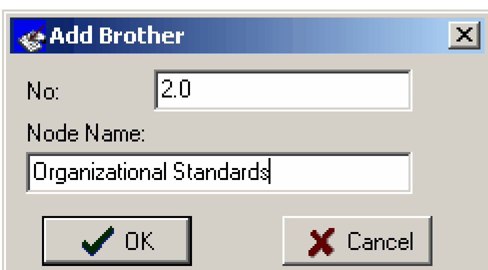


To Add More Functions

1. Right Click on the function. A pop-up menu appears.
2. Select **Add Child** or **Add Brother.** The **Add Child or Add Brother** window appears.



3. Enter a **No.** and a **Node Name** for the function.



4. Click OK. The function is added to the **Function** field.

*Note: To Rename a function, highlight the function and right click. Select **Rename**, and enter a new name for the function.*

*Note: To Delete a function, highlight the function and right click. Select **Delete**, and confirm your deletion.*

5. To Rearrange functions, refer to the section Restructuring Trees.

5.1.2.2 Working with Process/Business Requirements

Analyst Pro provides many features for working with requirements, including adding hierarchical (Child and Brother) requirements, deleting, and modifying requirements. You can also link requirements to each other, assign requirements to team members, and reference requirements to diagrams and files stored in the Repository. Each of these options is covered below.

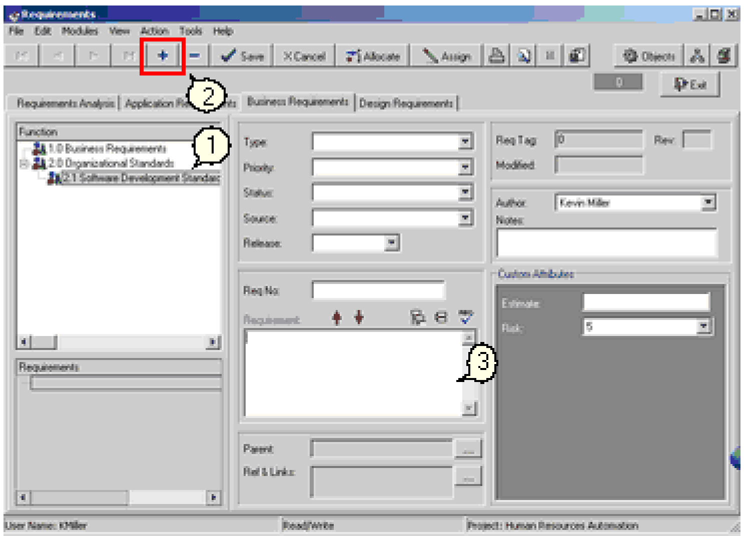
Note: Analyst Pro allows the user to import requirements from documents. This is covered in the section Importing Requirements.

To Add Requirements

1. Select the **Function** you want to add a Requirement to.

2. Click the Add button . The **Requirement** field is activated.

3. Enter the information for the Requirement. Click **Save**. The Requirement is saved to the function.

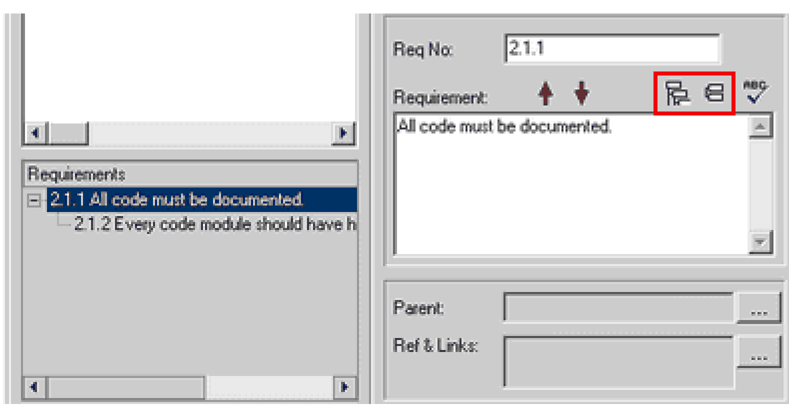


To Add a Child or Brother Requirement

1. In the **Requirement** field, select a Requirement and click  to add a **Child Requirement,** or  to add a **Brother Requirement.** The **Req No.** field is activated.

2. Enter the **Requirement Number.** Press **Tab**.

3. Enter the information for the Requirement. Click **Save**. The requirement is saved to the function.



To Delete a Requirement

1. Select the **Requirement** you want to delete.

2. Click the Subtract button . Confirm your deletion, and the requirement is deleted for the function.

To Modify a Requirement

1. Select the **Requirement** you want to modify.

2. Make the necessary changes and click **Save**. The changes to the Requirement are saved.

*Note: To cancel the changes, click **Cancel.***

Note: To Spell Check your requirement at any time, click .

To **Link Requirements** to each other, Diagrams, or Files, select the **Requirement** and click on the **Ellipsis (...)** button.

To **Assign Requirements to Team members**, select the **Requirement** and click on **Assign**.

To **Allocate Requirements to Lower Level Components** (design objects), select the **Requirement** and click on **Allocate**.

5.1.3 Design Requirements

Design Requirements include application and process requirements that are allocated to lower-level software or product components (Design Objects) such as forms, reports, Web pages, stored procedures, classes, etc, as well as requirements specific to these design objects. (Design Objects are the objects that are specifiable.)

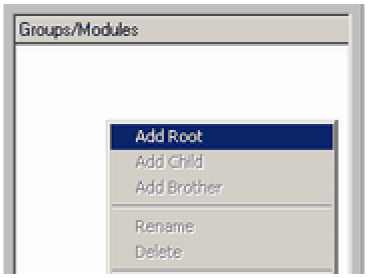
From these Design Requirements, detailed design specifications for Design Objects can be developed.

5.1.3.1 Working with Groups/Modules

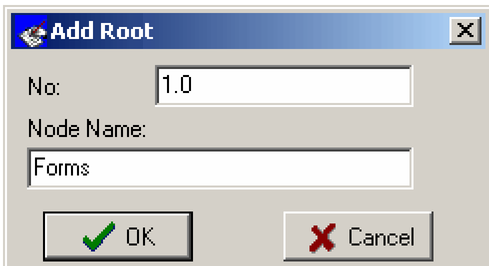
Before working with Design Requirements, first plan and build your *Groups/Modules* hierarchy using the tree structure.

To Build a Group/Module

1. Right click in the **Group/Module** field. A pop-up menu appears.



2. Click on **Add Root**. The **Add Root** window appears.

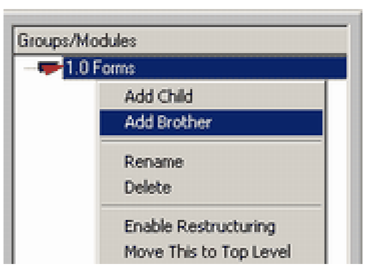


3. Enter a **No.** and a **Node Name** for the Group/Module.

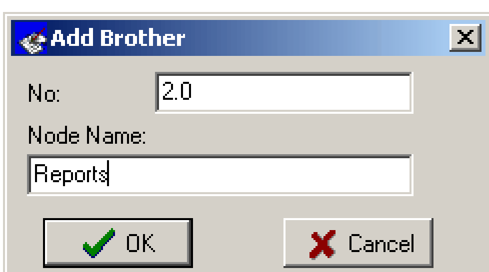
4. Click on **OK.** The Group/Module is added to the **Group/Module** field.

To Add More Group/Modules

1. Right Click in the **Group/Module** field. A Pop-Up menu appears.



2. Select **Add Child** or **Add Brother**. The **Add Child or Add Brother window** appears.



3. Enter a **No.** and a **Node Name** for the **Group/Module**.

4. Click OK. The **Group/Module** is added to the **Group/Module** field.

*Note: To Rename a Group/Module, highlight the **Group/Module** and right click. Select **Rename**, and enter a new name for the Group/Module.*

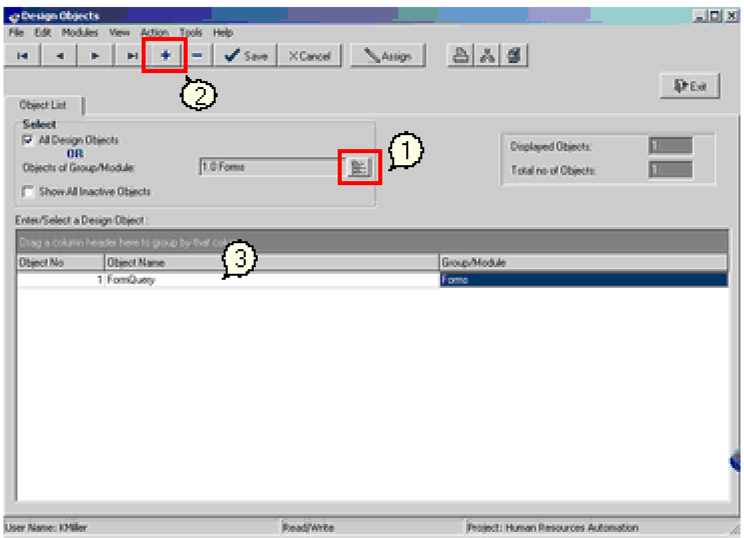
*Note: To Delete a Group/Module, highlight the **Group/Module** and right click. Select **Delete**, and* *confirm your deletion.*

5. To Rearrange **Groups/Modules**, refer to the section Restructuring Trees.

5.1.3.2 Working with Design Objects

This section provides instruction on how to add a *design object, delete a design object,* and *deactivate or activate objects*. In order to add **Design Objects**, click on the **Objects** button on the **Requirements** tool bar or access the Design Object module.

The following screen appears:



Note: Numbers on the screen match the steps below under ***To Add a Design Object****.*

To Add a Design Object

1. Select a **Group** that needs objects.
2. Click the Add button  to add an object to the selected group. Use the **Enter** key or **Tab** key to navigate to the next field.
3. Enter the **Object** into the grid
4. Click on **Save** to save the record.

To add more objects, repeat the above steps.

Deleting, Inactivating and Activating Objects

Note: Deleting objects from the grid deletes them from the system. Inactivating objects removes them from the grid and renders them temporarily inactive. Inactive objects may be activated at any time.

To Delete Objects

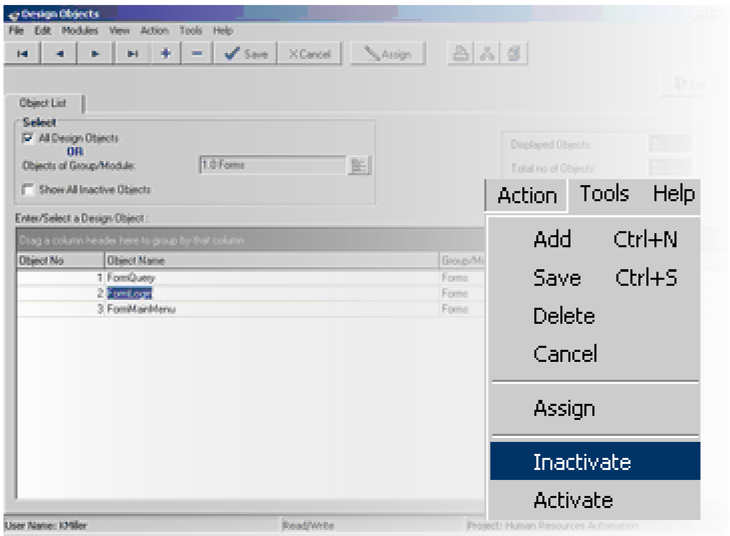
1. Select the **Object** in the grid you wish to delete.
2. Click the Subtract button  to delete the object.

Deleted objects are removed from the system.

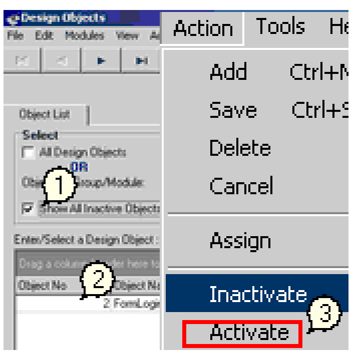
If you do not want to remove the object permanently from the system, inactivate the object.

To Inactivate Objects

1. Select an **Object** from the list
2. Click **Inactivate** from the **Action** menu to remove the object from the list. Objects can be re-activated at any time.



To Activate Objects



1. Select the **Show All Inactive Objects** option.
2. Click on the **Inactive Object** in the grid.
3. Click on the **Activate command** on the **Action** menu. The object is removed from the **Inactive Object** list.

5.1.3.3 Working with Design Requirements

Analyst Pro provides many features for working with requirements, including add*ing hierarchical requirements (Child and Brother requirements), deleting,* and *modifying requirements*. You can also link requirements to each other, assign requirements to team members, and reference requirements to diagrams and files stored in the Repository. Each of these options is covered below.

Note: Analyst Pro allows the user to import requirements from documents. This is covered in the section Importing Requirements.

To Add Requirements

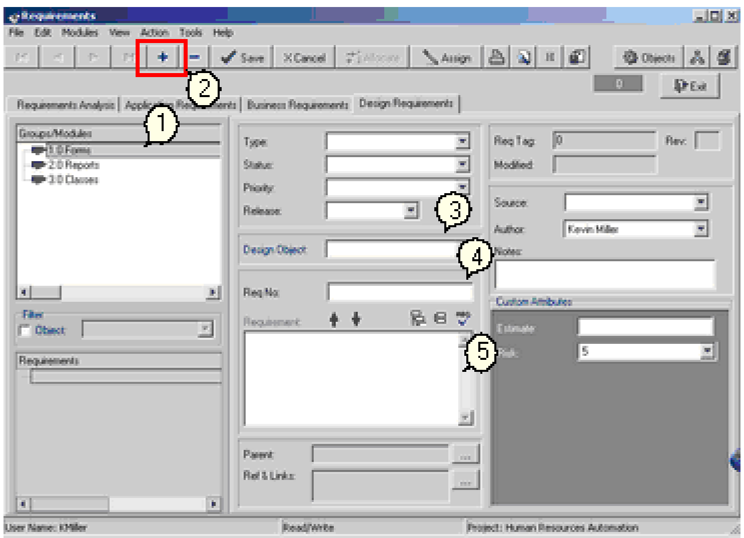
1. Select the **Group/Module** you want to add a Requirement to.

2. Click **+**. The **Requirement** field is activated.

3. Select a **Design Object** (Optional).

4. Enter **Req No.** (optional).

5. Enter the information for the **Requirement**. Click **Save**. The **Requirement** is saved to the **Group/Module**.

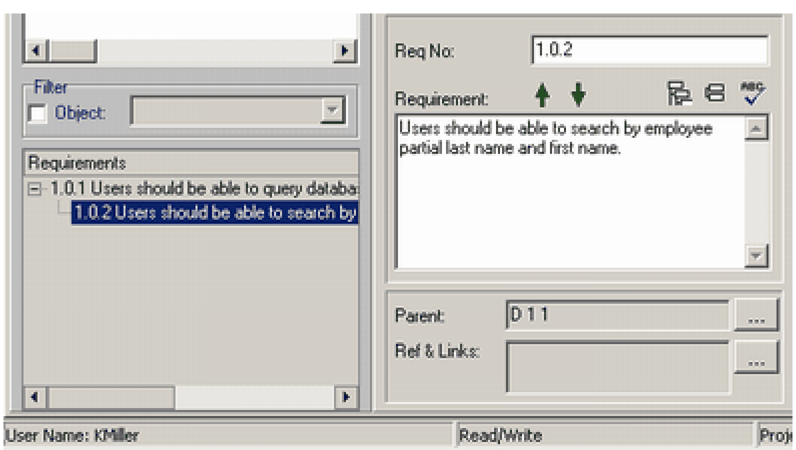


To Add a Child or Brother Requirement

1. In the **Requirement field**, select a **Requirement** and click to add a **Child Requirement**, or to add a **Brother Requirement**. The **Req No.** field is activated.

2. Enter the **Requirement Number**. Press **Tab**.

3. Enter the information for the Requirement. Click **Save**. The Requirement is saved to the **Group/Module**.



To Delete a Requirement

1. Select the **Requirement** you want to delete.

2. Click the Subtract button . Confirm your deletion, and the Requirement is deleted for the **Group/Module**.

To Modify a Requirement

1. Select the **Requirement** you want to modify.

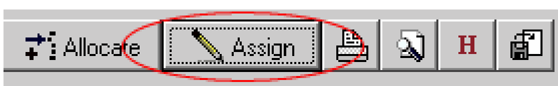
2. Make the necessary changes and click **Save**. The changes to the **Requirement** are saved.

*Note: To cancel the changes, click **Cancel**.*

Note: To Spell Check your requirement at any time, click the  *button.*

To **Link Requirements** to each other, Diagrams, or Files, select the **Requirement** and click on the **Ellipsis (...)** button.

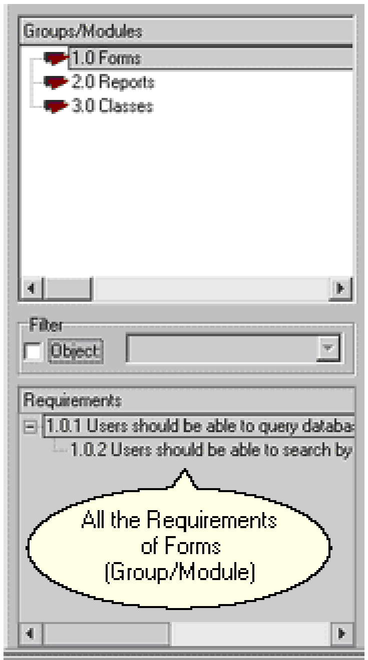
To **Assign Requirements to Team members**, select the **Requirement** and click on **Assign.**



To **Allocate Requirements to Lower Level Components** (design objects), select the **Requirement** and click on **Allocate**.

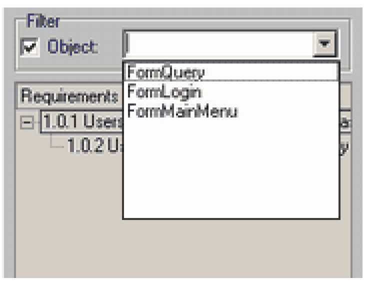
5.1.3.4 Working with Filters

When a Group/Module is selected in Design Requirements, all the requirements of all objects in the selected module are displayed in the lower part of the dialog, as shown below. In order to show the requirements of a particular object alone, you need to *Filter* them.



To Filter Requirements

1. Check the **Object** check box.
2. Select an **Object** from the list.
3. The Requirements of that object are displayed in the tree.



5.2 Linking Requirements

Analyst Pro allows allocation of higher level requirements (*Application, Process* or *Business Requirements,* etc.) to design objects. A single requirement or a set of requirements can be allocated to a single object or a set of objects.

Analyst Pro allows you to *link requirements* in addition to creating parent-child links. You can also create connections between requirements and stored files and diagrams. *Links* refer to linking of a requirement to any other requirement, whereas *References* refer to linking requirements to files stored in the Repository and diagrams created in the diagrams module.

5.2.1 Requirements Allocation

Analyst Pro allows automatic allocation of higher level requirements (*Application, Process* or *Business Requirements,* etc.) to design objects, where they are satisfied. Higher level requirements include *User Requirements, System Requirements, Functional Requirements, Interface Requirements, Quality Requirements*, etc. Automatic allocation of requirements copies the original requirement to the lower level objects. Analyst Pro's flexible, powerful allocation mechanism functions as follows:

- A single requirement can be allocated to a single object or a set of objects, and
- A set of requirements can be allocated to a single object or a set of objects.

Example: *Every form should display login user name in the status bar.*

The above example shows an *Application Requirement.* This requirement can be allocated to all forms in the application by simply using the allocate function. This saves time since team members do not have to enter a requirement (that applies to multiple objects) numerous times.

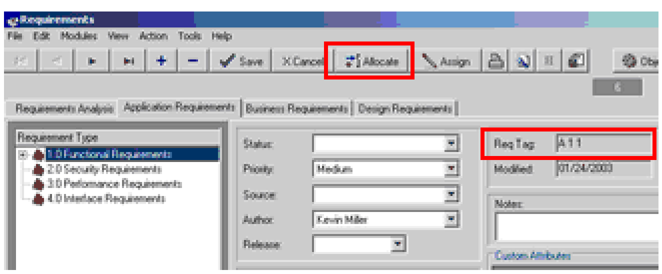
Allocated requirements may be modified. However, when allocated requirements are modified, the original requirement (such as user requirements) are kept intact.

Note: You cannot allocate a requirement to one or more design objects until you have created Groups/Modules and Design Objects. For more information see the section titled Working with Groups/Modules and Working with Design Objects.

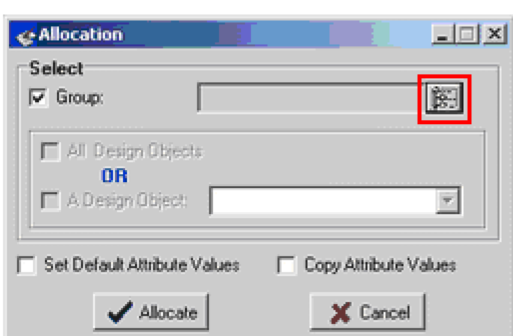
To Allocate a Requirement to a Design Object

1. Log into the system.
2. Select **Modules** from the Main Menu. When the **Modules** menu displays, select **Requirements**. When the **Requirements** menu displays, select **Application Requirements** or **Process (Business) Requirements.**

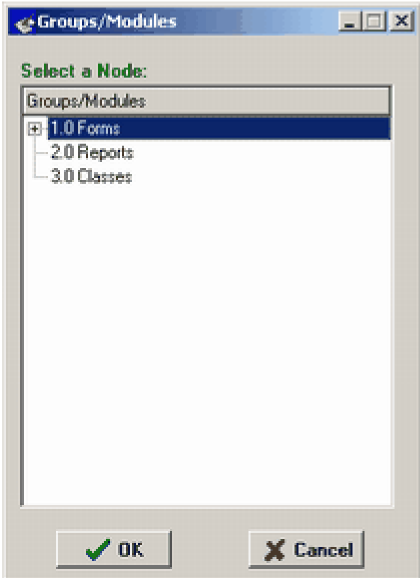
   (Your selection in this step depends on the requirement you want to allocate to a design object. For example, select **Application Requirements** if you want to assign an **Application Requirement** to a design object. Or, you can quickly find a Requirement by following the steps in the section titled, Finding a Requirement.)
3. Locate a **Requirement** you want to allocate to a design object. (The following picture shows a Requirement that has been selected.)



4. Click on the **Allocate** button. The **Allocation** window displays. The **Group** check box is checked by default.

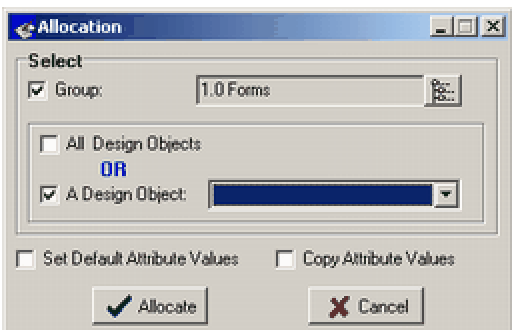


5. Click on the **Group/Modules** button. The **Group/Modules** window displays.



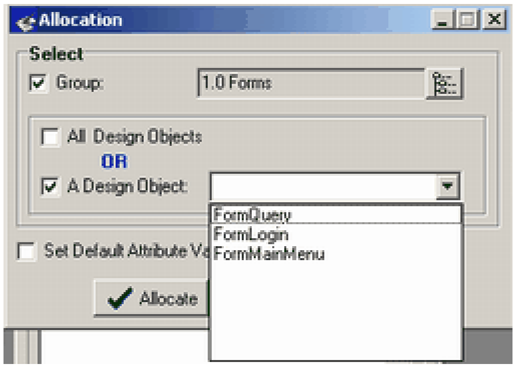
6. Select a **Group/Module** that includes the object you want to allocate the requirement to. (For example, if you wanted to allocate the requirement to a specific form and you had a group called **Forms**, you would select the **Forms** group in this step.)

7. Click on the **OK** button. The **Groups/Modules** window closes. The selected group displays in the **Group** field. (In the picture below, the **Forms** group was selected from the **Groups/Modules** window.)

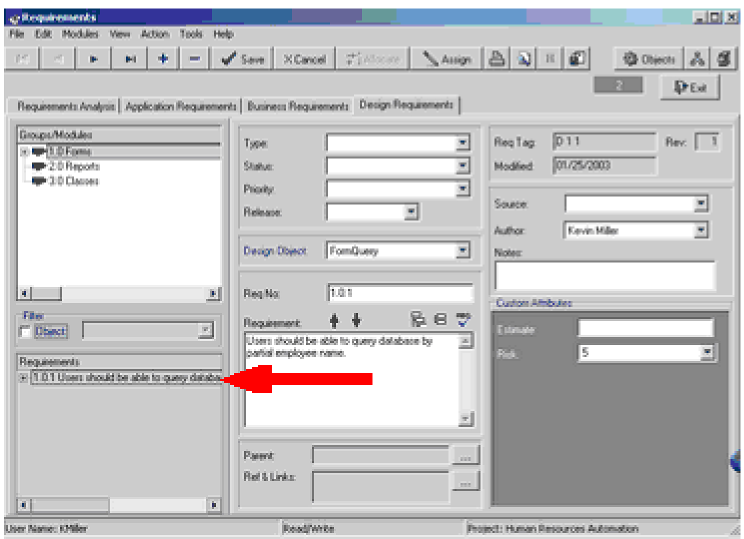


8. To allocate the requirement to *all objects* in the group, click on the **All Design Objects** check box and go to step 11. Or, to allocate the requirement to *a specific object* in the group, (such as a specific form, etc.) click on the **A Design Object** check box and go to the next step.

9. Click on the **Down Arrow** at the end of the **Design Object** field. The objects that belong to the selected group display in the drop-down list. (In the picture below, a list of forms display since the **Forms** group was selected.)



10. Click on the **Object** you want the Requirement allocated to.
11. To have all applicable default attributes automatically applied to the Requirement allocated to the Design Object, click on the **Set Default Attribute Values** check box. If you only want to apply the attributes that the Application Requirements and Design Requirements share (i.e., Status, Priority, Source, Author, Release), click on the **Copy Attribute Values**.
12. Click on the **Design Requirements** tab. The **Design Requirements** tab options displays.



13. The Requirement you allocated appears under the **Requirements** heading on the **Design Requirements** tab. The Requirement is listed under the **Group/Modules** and object(s) you specified.
14. Click on the **Requirement** to select it. Then add any desired notes and other information.
15. When you have finished, click on the **Save** button. Then either perform another task; or, click on the **Exit** button to close the **Requirements** window.

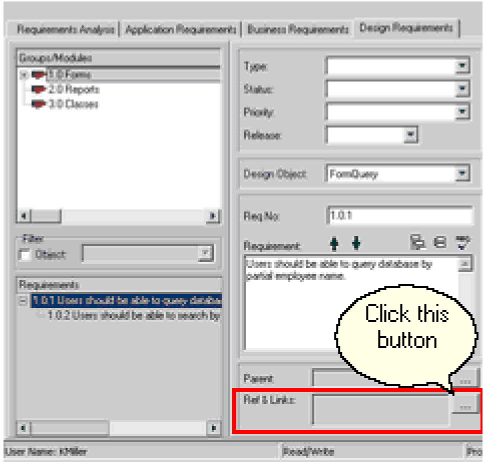
5.2.2 Links

You can add or remove links to your requirements from the *Requirements screen*.

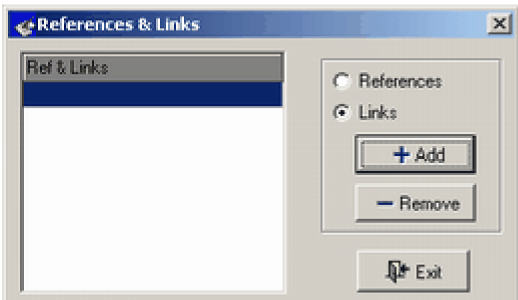
To Add Links

1. Select **Ref & Links Attribute** of any class of requirements.

2. Click on the **Ellipsis (...)** button.

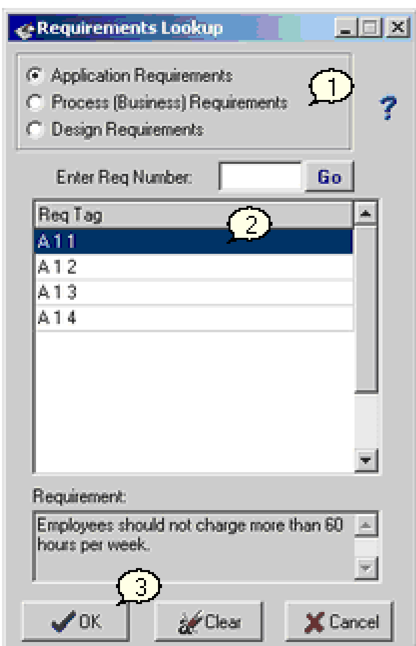


The following screen appears:



3. Select the **Links** option. Click on the **Add** button.

The following screen appears:



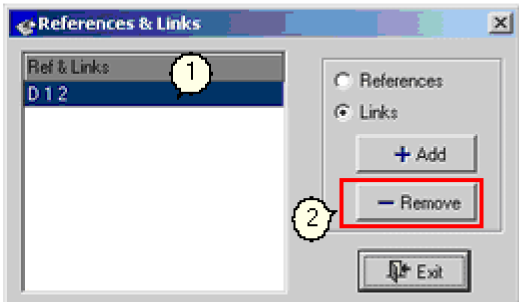
a. Select **Class** of Requirements.

b. Select a **particular** Requirement.

c. Click on **OK**. The **Link** is added to the list.

To Remove Links

1. Select a **Requirement** from the **Ref & Links** list.
2. Click on the **Remove** button.



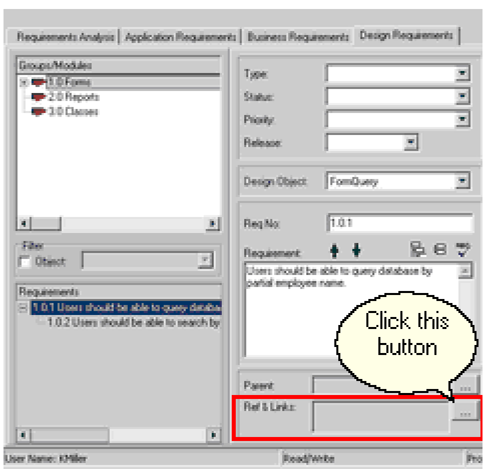
The **Link** is removed from the list.

5.2.3 References

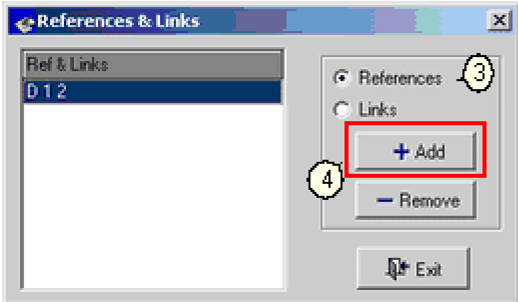
You can add or remove references to your requirements from the *Requirements screen*.

To Add References

1. Select **Ref & Links**.
2. Click on the **Ellipsis (...)** button.

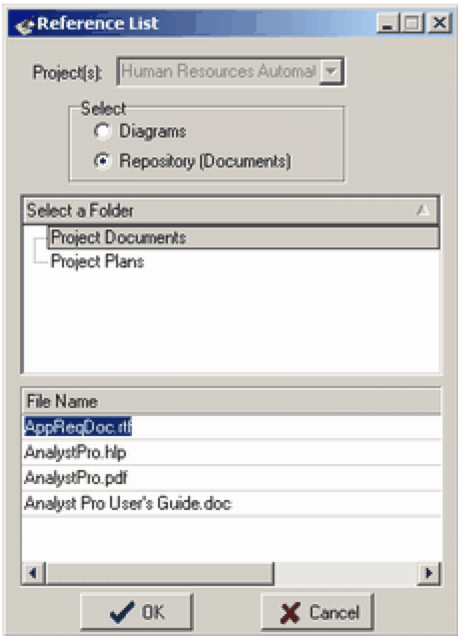


The following screen appears:



3. Select the **References** option.
4. Click on the **Add** button.

The following **Reference List** screen appears:



5. Select the **Diagrams or Repository** option.

If the Repository option is selected:

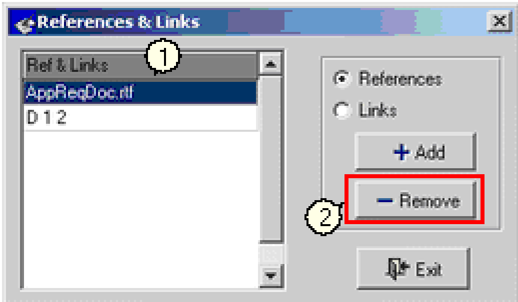
1. Select a **Folder**.
2. Select a **File name**.
3. Click on **OK**.

If the Diagrams option is selected:

1. Select a **Diagram**.
2. Click on **OK**.

To Remove References

1. Select a **Reference** from the list.
2. Click on the **Remove** button.



The **Reference** is removed from the list.

5.2.4 Toggling between Requirements and References

Analyst Pro makes *toggling between requirements and their references* very easy. Simply double-click on the *Reference* (a diagram or Repository file) in the *Ref & Links Attribute* of the respective requirement. Analyst Pro opens the appropriate reference module (diagram or Repository file) for you.

5.3 Working With Requirements

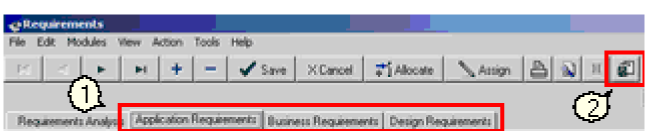
This section provides instructions on how to *import requirements, navigate through requirements, print requirements, find requirements,* and *view deleted requirements*.

5.3.1 Importing Requirements

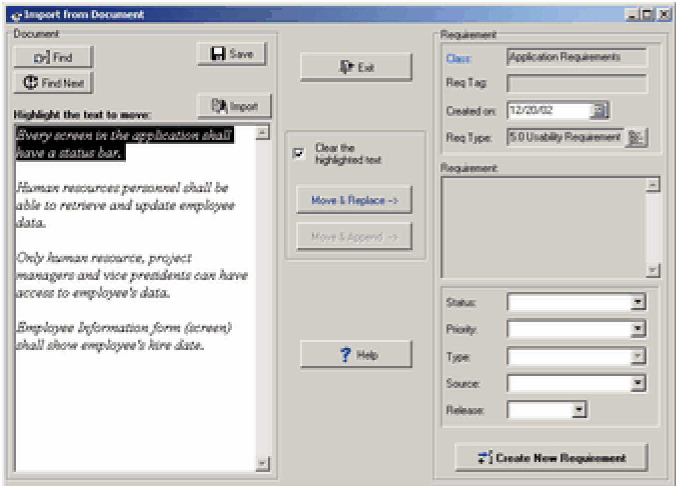
Analyst Pro allows users to *import requirements* from existing documents. With Analyst Pro, it is possible to import a text block from a document as a requirement, and also to reference a whole document as a requirement.

Access this screen from the tool bar on the *Requirements* screen. You can import a requirement into any group (e.g., *Application, Process*, or *Design Requirements* groups).

1. Select the **Application Requirements**, **Business (Process) Requirements**, or **Design Requirements** tab.
2. Click the Import button .



3. Click the **Import** button to pull a document into the **Highlight the text to move** window.
4. Highlight the **text** you want to create as a Requirement.
5. Click the **Move & Replace** or **Move & Append** button (when it is active).
6. Select **Attribute Values** for the Requirement.
7. Click the **Create New Requirement** button. This creates the new Requirement.



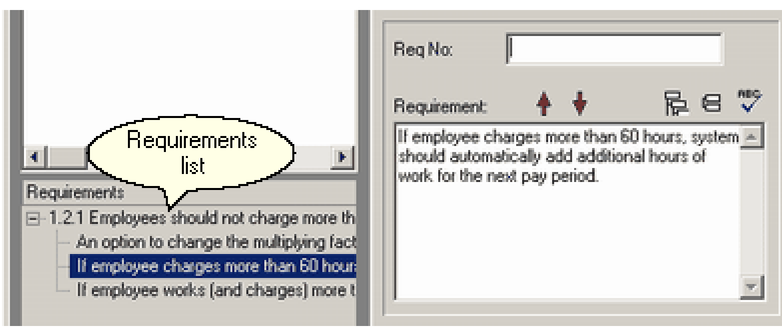
Repeat steps 4 through 7 to import more Requirements.

8. If you want to save the document after partially importing data, click the **Save** button.

Note: If you check the "Clear Highlighted Text," the text is removed from the document text box. This is useful for knowing whether a requirement is created or not. However, it does not remove the requirement from the source document.

5.3.2 Navigating through Requirements

Analyst Pro provides many options to help you navigate through the list of requirements in the *Application Requirements tab, Process (Business) Requirements tab*, and the *Design Requirements tab*. Follow the steps in this section to learn how to navigate through a list of requirements.



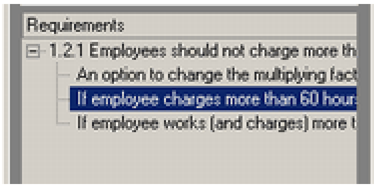
To Navigate Through Requirements

Option 1:

Place your cursor in the **Req No** field and use the **Down and Up** arrow keys on your keyboard. This is useful to quickly access numbered requirements in the list.

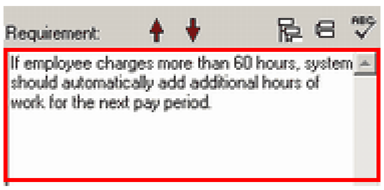
Option 2:

Click on each requirement in the list or use your **Down and Up** arrow keys when a requirement is selected in the list.



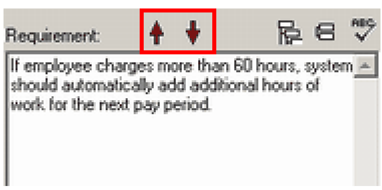
Option 3:

Place your cursor in the **Requirement** field and use the **ALT + Down Arrow** key on your keyboard to view the next requirement, or the **ALT + Up Arrow** key on your keyboard to view the previous requirement.



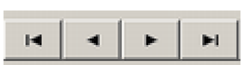
Option 4:

Click on the **Down Arrow** button to view the next requirement. Or, click on the **Up Arrow** button to view the previous requirement.



Option 5:

Use the **Left and Right Arrows** to navigate through the list.



5.3.3 Printing Requirements

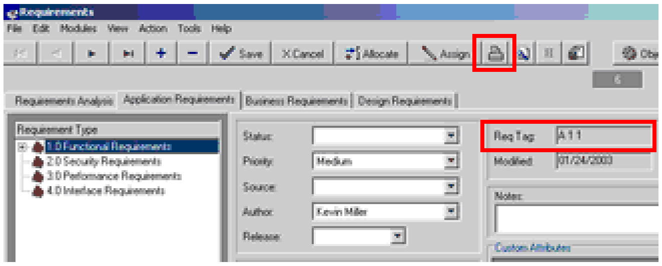
This section covers printing requirements from *Application, Process (Business),* and *Design Requirements* tabs. When a design requirement is associated with a design object, it is possible to print design objects requirements, design object details, etc.

To print a requirements list generated with filters, requirement documents, and requirement history reports, refer to requirements analysis, documents, req history topics, respectively.

Instructions are provided below to print a requirement and requirements list from *Application Requirements, Process (Business) Requirements,* or *Design Requirements tabs*.

To Print a Requirement

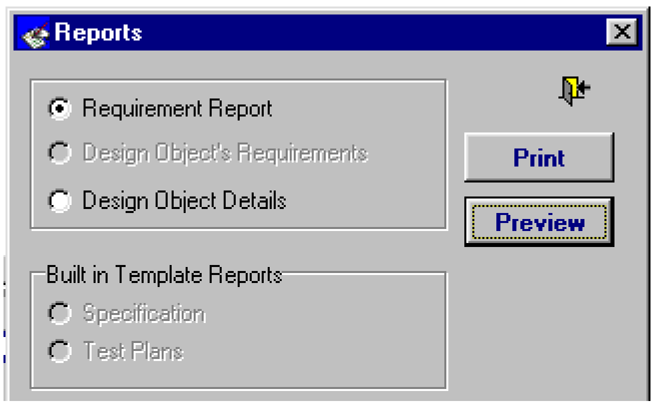
1. Locate the **Requirement** you want to print in **Application**, **Process** or **Design Requirements**. (The following picture shows a requirement that has been located.)



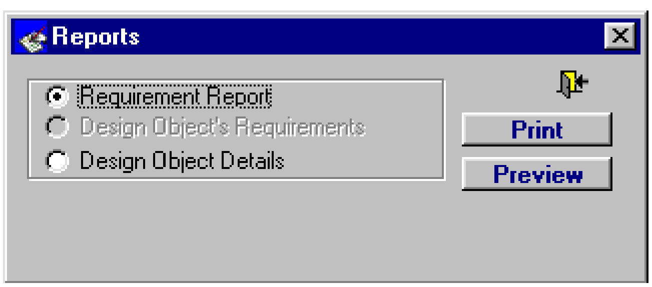
2. Click on the **Print button** on the **Requirements window**.

The **Report** dialog that displays depends on whether or not the Include **Spec & Test Template** check box is selected (under the **Design Objects** heading) on the **Project Details** window. (See the section titled Setting Project Options for more details.)

If the **Include Spec & Test Template check box** is selected on the **Project Options** window, the following **Reports** window displays:



If the **Include Spec & Test Template** check box is *not* selected on the **Project Options** window, the following **Reports** window displays:



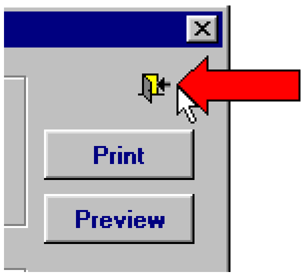
3. Click on the desired option button as follows:

- **Requirement Report** - This type of report includes the requirement, the Req Tag number, requirement type, priority, Release Ref & Links, Notes, Req Status, Parent Tag, Source, Author, Date Created, Date Modified.
- **Design Object Details** - Includes the name of the object, purpose and interfaces if neither the **Specification** option button nor the **Test Plans** option button is selected. However, you can select the **Specification** or the **Test Plans** option button for a more detailed report as follows:
- Under **Built-in Template Reports** heading, if an application, you may select an option as follows:
    - **Specification** - Click on this option button to produce a report that includes the Analyst,

Phone Number Date, System, Program, Due Dates (for test Results, Production) Estimated Programming Time, Management Sign off, Purpose, Database Object, Interfaces, etc.

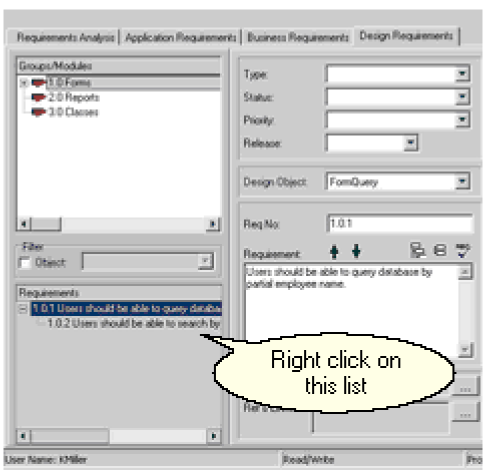
- **Test Plans** - Click on this option button to produce a report that includes Unit Test information for the object, requirements for test results, and integration or system test information.

4. Click on the **Print** button to print the report. Or, click on the **Preview** button to review the report before it prints.
5. When you have finished, click on the **Close** button (shown below) to exit the **Reports** window.

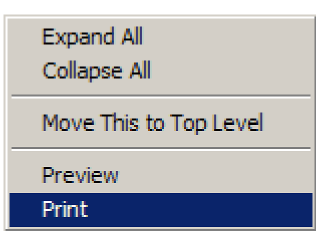


To Print a Requirements List

1. Right-click on the **Requirements List**.



2. The following pop-up menu appears. Click on **Print** or **Preview** to Print or Preview reports. To customize the report, refer to the customizing Analyst Pro topic.



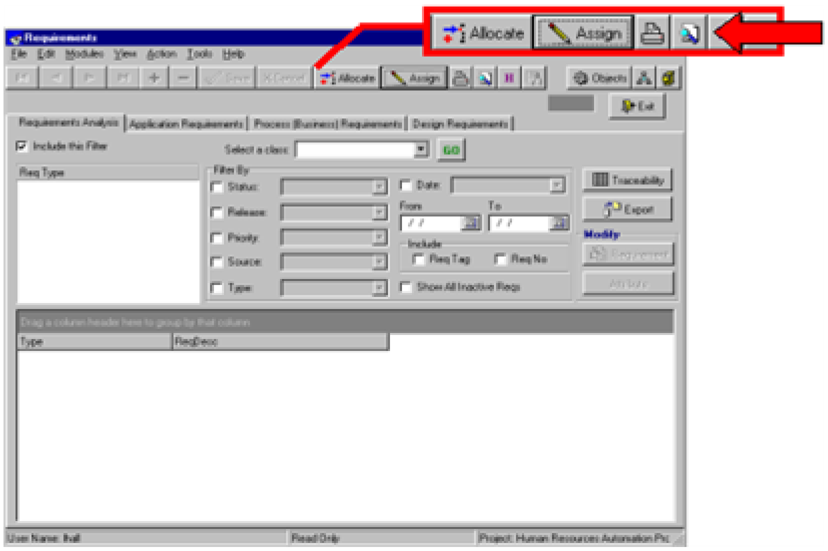
5.3.4 Finding Requirements

As you and other project team members create requirements, no doubt the system will ultimately contain numerous requirements. With Analyst Pro you can quickly find a requirement by performing the following steps.

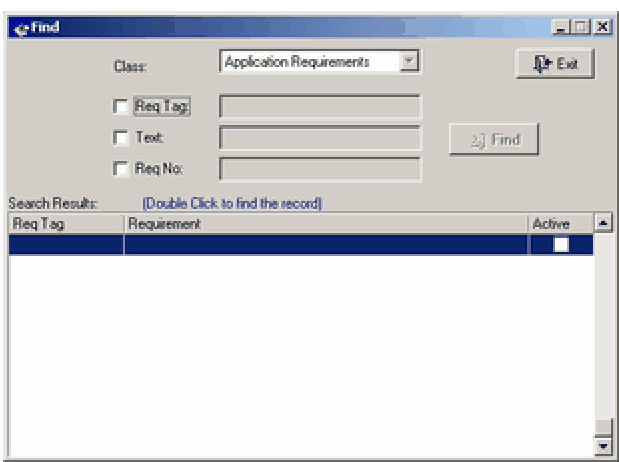
To Find Requirements

1. Go to the Requirements Module.
2. Select the tab for which you want to find requirements.

   Your selection in this step depends on the class (or category) of the requirement you want to Find. For example, select the **Application Requirements** tab if you want to find an application requirement.)
3. Click on the **Find** button located at the top of the window.



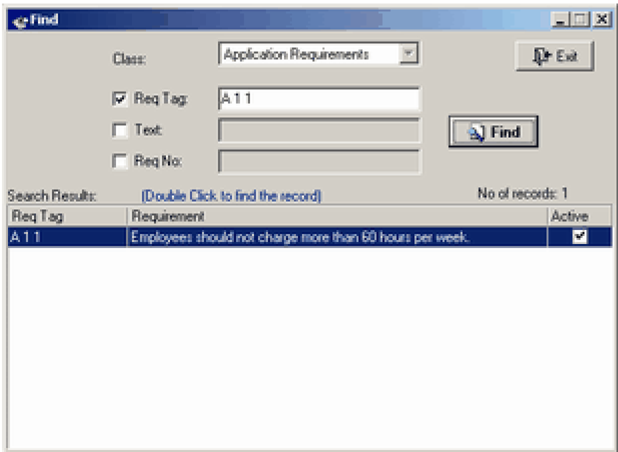
The **Find** window displays.



4. Click on the applicable check box as follows:
   - **Req Tag** - Click on this check box and enter the **Req Tag** of the requirement you want to find. This is an excellent way to quickly find requirements referenced by another requirement since the **Req Tag number** is provided in the **Ref & Links** field.
   - **Text -** Text search allows wild card searches. Use **asterisk *** as wild card.
   - **Req No.** - Click on this check box and enter the number of the Requirement in the **Req No.** field. For example, if you want to find Requirement 1.3.1, you would enter 1.3.1 in the **Req**

No. field.

5. Click on the **Find** button. The results display in the lower portion of the **Find** window.



6. Double click on the **Requirement.** The corresponding Requirement will be shown in the **Requirements** module.

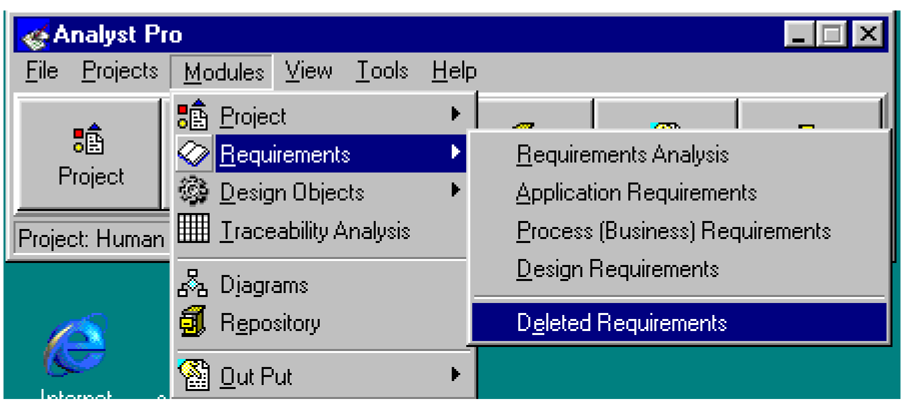
7. When you have finished, click on the **Exit** button to close the **Find** window.

5.3.5 Viewing Deleted Requirements

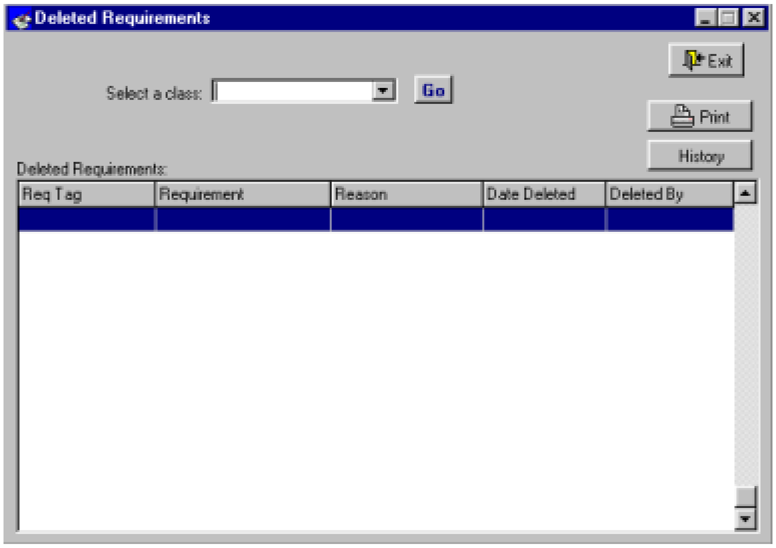
You can easily review requirements that have been deleted by following the steps below.

To View Deleted Requirements

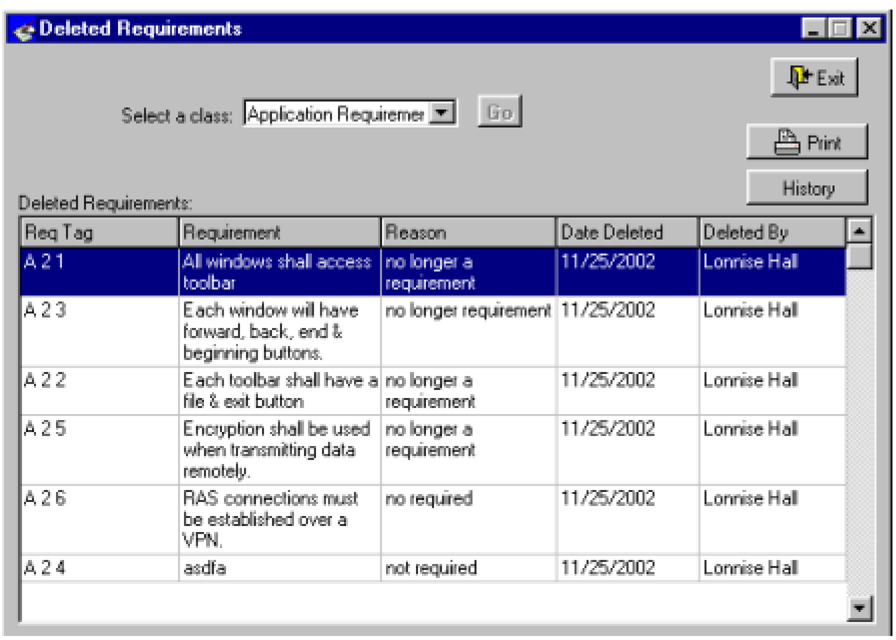
1. Select **Modules** from the menu bar. When the **Modules** menu displays, select **Requirements**. Then select **Deleted Requirements** from the **Requirements** menu, as shown below.



The **Deleted Requirements** window displays:



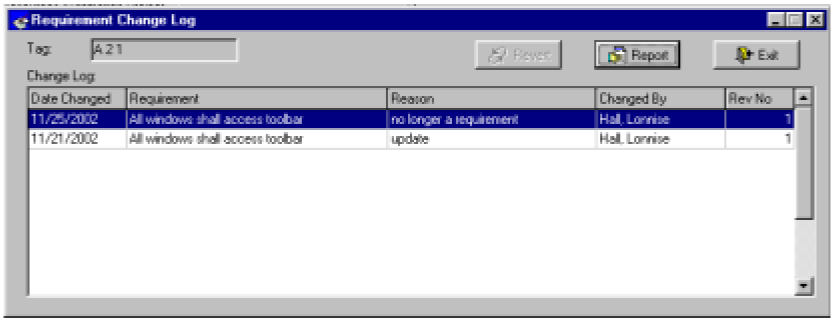
2. Click on the down arrow at the end of the **Select a class** field. A list of classes displays.
3. Select an option from the list as follows:
   - **Application Requirements** - Select this option to view deleted Application Requirements.
   - **Process (Business) Requirements** - Select this option to view deleted Process or Business Requirements.
   - **Design Requirements** - Select this option to view deleted Design Requirements.
4. Click on the **Go** button. The results display in the lower portion of the window, as shown:



You can view the change history of a deleted requirement or print the list of deleted requirements. To *view the change history* of a deleted requirement, go to step 4.1. To *print the list* of deleted requirements, go to step 6.

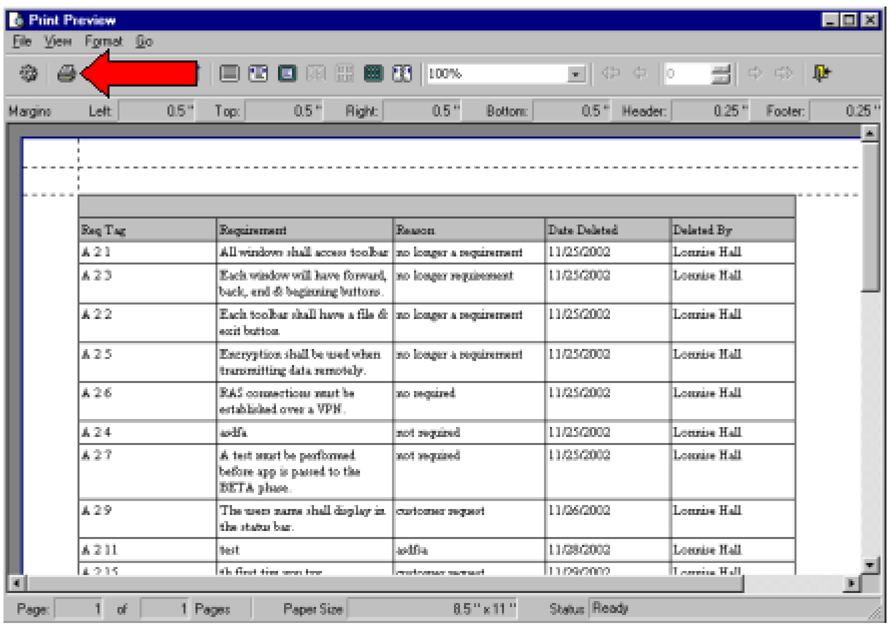
4.1 Click on the **Requirement** whose change history you want to view.

4.2 Click on the **History** button. The **Requirement Change Log** window displays a list of changes made to the selected requirement as shown:



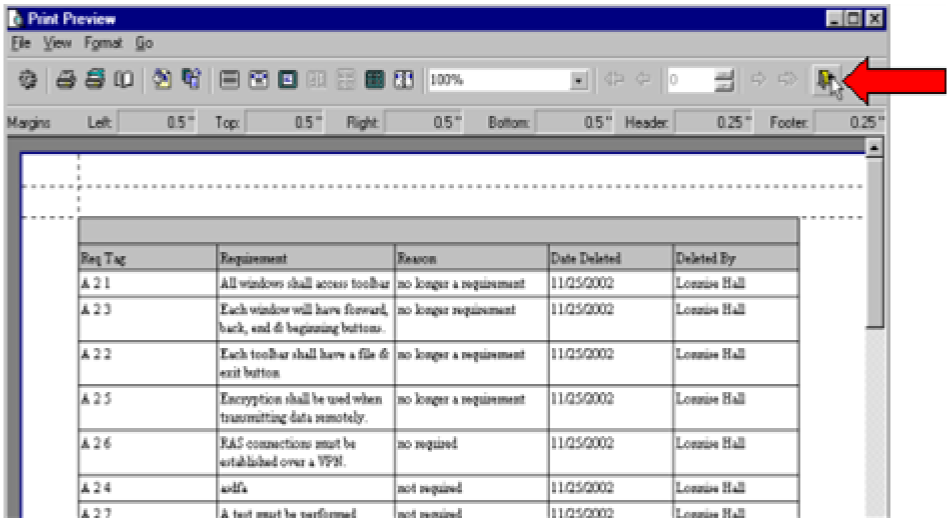
5. Click on the **Report** button to generate a **Change Log Report** that can be viewed and printed. When you have finished with the **Requirement Change Log**, click on the **Exit** button to close the window.

6. To print the list of deleted requirements, click on the **Print** button on the **Deleted Requirements** window. The **Print Preview** window displays:



7. Click on the **Print** button (indicated by the arrow in the above picture). The report prints.

8. When you have finished, click on the **Close** button (indicated by the arrow below) to exit the **Print Preview** window.



9. When you have finished viewing the deleted requirements, click on the **Exit** button to close the **Deleted Requirements** window.

5.4 Working with Requirements List

Analyst Pro allows you to work with the Requirements List. This chapter covers how to *update attribute values for a set of requirements, filter and group with attribute values, export to Excel and other formats*, and *activate and de-activate requirements*.

5.4.1 Requirements Analysis

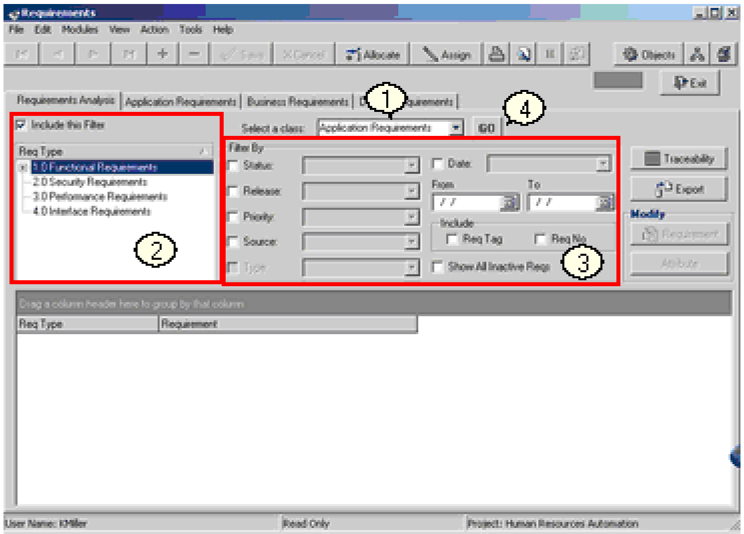
From time to time, you may need to work on a requirements set. Analyst Pro provides powerful features for *requirements filtering, grouping, exporting, and printing, modifying attribute values of a set of requirements, modifying requirements,* and *activating and inactivating requirements*.

This section covers requirements analysis that includes filtering, grouping, printing and exporting requirements.

Filtering Requirements

1. Select a **Class**.
2. Select a **Req Type** (**Function** for Process Requirements, **Group/Module** for Design Requirements).
   If you do not want to include this filter, uncheck the **Include the Filter** check box.
3. Select a **Filter**, if you want to filter by attribute value.
4. Click on **Go**.

The results are displayed in the grid.



Adding More Columns to a Result Set

1. Check the **check boxes** to display the corresponding column in the grid.
2. To display more columns, right click on the grid. The pop-up menu appears.

Select the **Attribute** that you want to include in the grid.

Grouping Requirements

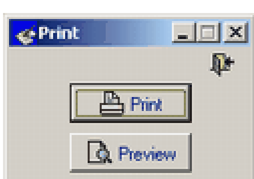
To group data by any column, simply drag that **column header** into the header panel.

Note: The requirement column is not draggable as it is a text field.

Printing Requirements

To print requirements, click on the **Print** button in the tool bar.

The following screen appears:



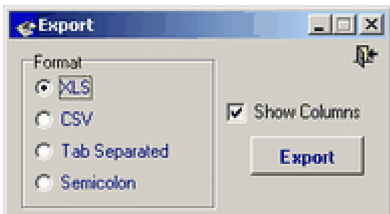
Select **Print** to print or **Preview** to preview.

All reports can be customized. Refer to Customizing Analyst Pro for details.

Exporting Requirements

To Export a Requirements List, click on the **Export** button (use **File** → **Export** menu option).

The following screen appears:

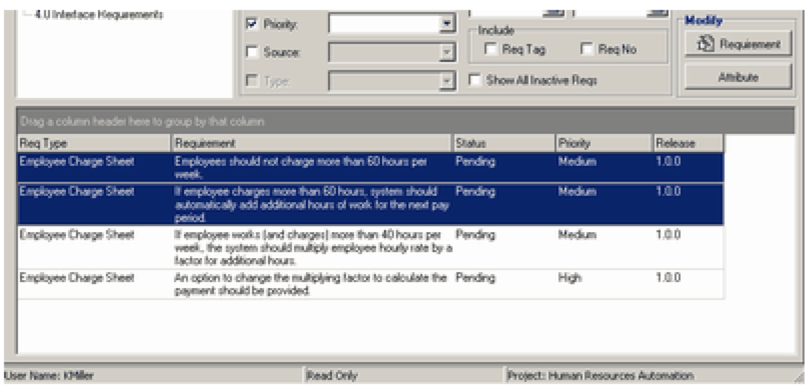


Select the required output format (XLS, CSV, Tab Separated, Semicolon). Click on **Export**.

5.4.2 Modifying Attribute Values & Requirement

In this section, we cover how to set or modify attribute values of a set of requirements.

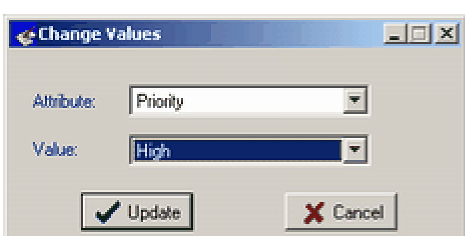
1. Select a requirement or multiple requirements in the requirement list.



To select multiple requirements, use **Shift** or **Ctrl** Keys.

2. Click on the **Modify Attribute** button.

The following screen appears:



3. Select an **Attribute**.
4. Enter or select a **Value**.
5. Click on the **Update** button.

Values of that attribute are updated.

Modifying a Requirement

Double click on a **Requirement** in the grid or click on the **Modify Requirement** button.

5.4.3 Activating & Inactivating Requirements

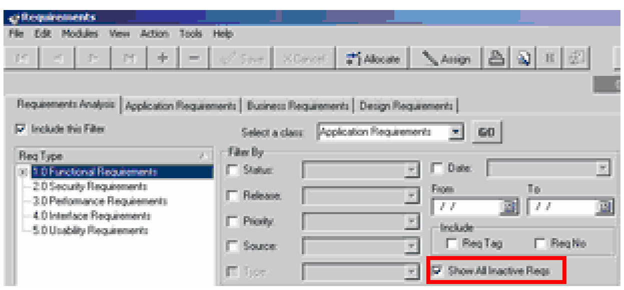
Analyst Pro requirements can be either inactivated or deleted. Deleted requirements are removed from the system (You can view them in the deleted requirements sub-module). You need to re-enter the whole requirement to restore. Inactivated requirements are removed from the system temporarily. They can be activated at any time with the procedure described below.

Activating Requirements

Activating requirements works only for inactivated requirements.

1. Select a **Class**.
2. Check "**Show All Inactive Reqs**"
3. Click on **Go**.

*Note: When **Show All Inactive Reqs** is checked, all other filters are ignored to generate requirements list.*



4. Select a **Requirement** or **multiple Requirements** from the grid.

To select multiple requirements use **Shift** or **Ctrl** key.

5. From the **Action** menu, click on **Activate.**

Inactivating Requirements

1. In order to inactivate requirements, generate a requirements list.
2. Select a **Requirement** or **multiple Requirements** from the list.
3. Click **Inactivate** from the **Action** menu.

The **Requirements** are removed from the list.

5.5 Requirements Change Management

Analyst Pro automatically records and lists any changes to your project, when the changes were made, and who made the changes. You can force the *Reason for Change* by option.

Analyst Pro also allows reverting to a previous version.

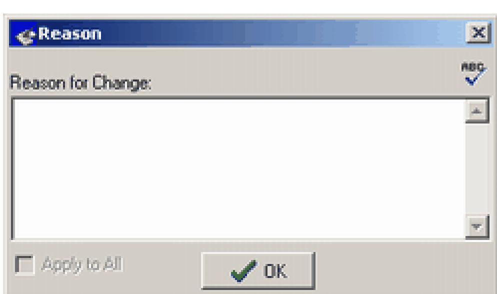
To Force Reason for Change

In order to force reason, **Force Req Reason** option has to be checked in project options.

Analyst Pro checks this option by default when you create a project.

If the above option is checked, the **Reason** dialog box appears whenever a requirement is changed.

Enter the **Reason for Change** and click OK.



A history log of requirements can be accessed using the **History** button .

To Revert to Previous Version

1. Select a **Requirements Version** in the requirements change log.

2. Click **Revert**.

Note: Refer to the Output module Req History sub-module for generating a requirements history list.

5.6 Traceability Analysis

Analyst Pro provides powerful traceability capabilities to enable you to study the impact of requirements change. Features provided permit the effects of small changes on requirements to be easily traced. Tracing leads you to all affected requirements and components of your system. This function provides clear direction in the creation of superior systems.

Analyst Pro traceability features include:

- **Trace views** help you to study the impact of requirement changes.
- **Trace reports** help you to identify unattached or dangling requirements not linked to other classes.

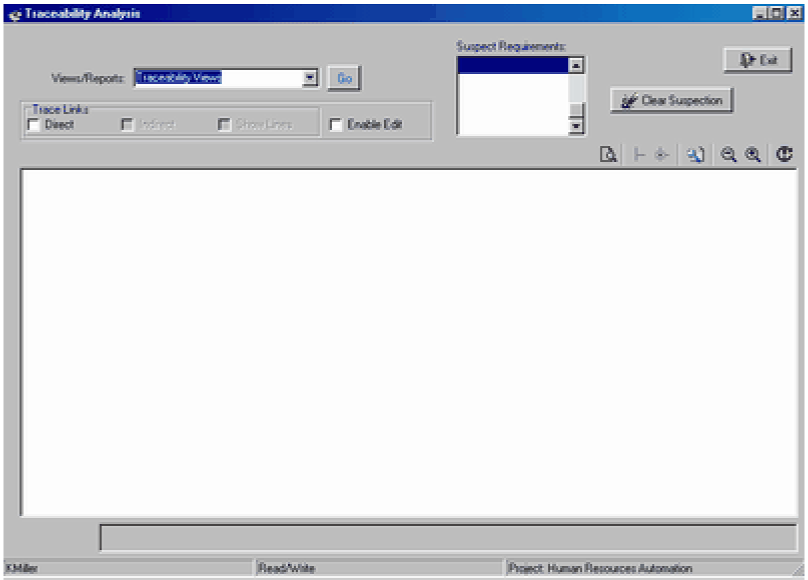
5.6.1 Traceability Views

This section provides instruction on creating traceability views and actions on views.

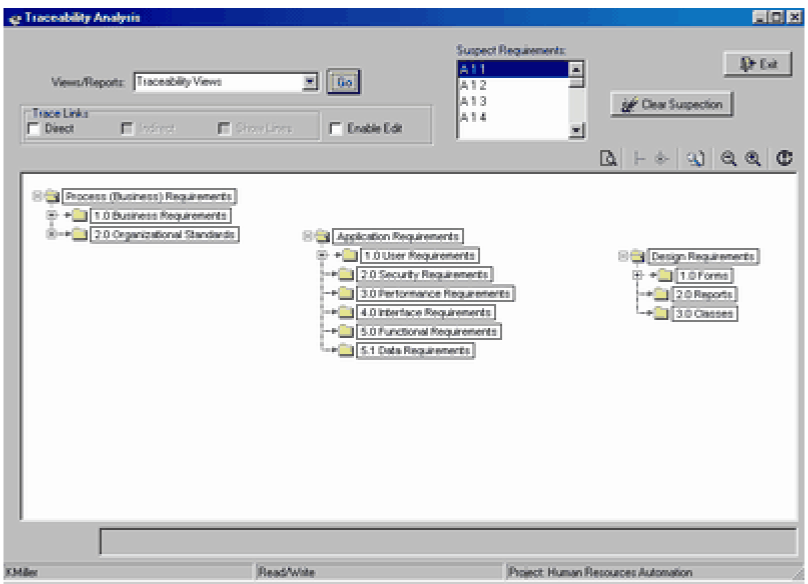
To Create Traceability Views

Analyst Pro allows you allows to create traceability views on the fly. In order to create traceability views, first access traceability module.

1. Select **Traceability Views** as your option in the **View/Reports** list box.
2. Click on the **Go** button.



3. Analyst Pro shows the traceability view of requirements.



To Rearrange Views

To rearrange a view, check the **Enable Edit** check box. Then drag the nodes to the position you want.

Actions on Views

Toolbar:

Popup Menu:

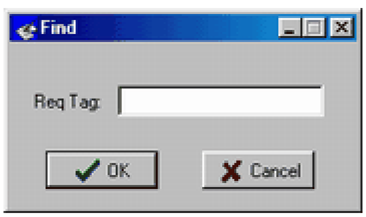
Expanding: To expand the view , click on the **Expand** button on the toolbar or click on the **Expand All** menu option.

Collapsing: To collapse a view , click on the **Collapse** button or click on the **Collapse All** menu option.

Previewing/Printing: To preview and print the view, click on the **Preview/Print** button or the **Preview/Print** menu option. Analyst Pro uses your default paint/graphics program to print the view.

Zoom In/Out: To zoom in, click the **Zoom In** button or the **Zoom In** menu option. To Zoom Out, click on the **Zoom Out** button or the **Zoom Out** menu option.

Find: To locate a requirement in the view, click on the **Find Utility** button or the **Find Menu** option. The **Find** dialog appears. Enter the **Req Tag** and click **OK**.



5.6.2 Impact Analysis

Among the challenging tasks systems and business analysts face is that of understanding the impact of a requirements change on the system. Analyst Pro provides unique and powerful features for effective impact analysis of requirements change.

Impact Analysis with Analyst Pro

Analyst Pro employs the following conventions for impact analysis:

- **Suspect Requirements:** If a requirement is changed, Analyst Pro marks the requirement as suspect.
- **Direct Trace Links:** If requirements are directly affected by a requirement change, they are termed direct trace links.
- **Indirect Trace Links:** If requirements are indirectly affected by a requirement change, they are termed indirect trace links.

Steps for Impact Analysis

You have already learned how to create a view in the previous section. When you create a view, Analyst Pro also populates all the suspected requirements in the list.

1. Check the **Direct** check box in **Trace Links** for studying the directly-impacted requirements; check the **Indirect** check box to study also indirectly-affected requirements. Check the **Show Lines** check box to show relationships between affected requirements of different classes.

2. Select a **Requirement** and click on it. This can be done in any one of three ways:
   a) Click on a **Suspect Requirement** in the list,
   b) Manually locate and click on a **Requirement** in the view, or
   c) Use the **Find** utility to locate and click on a **Requirement** in the view.

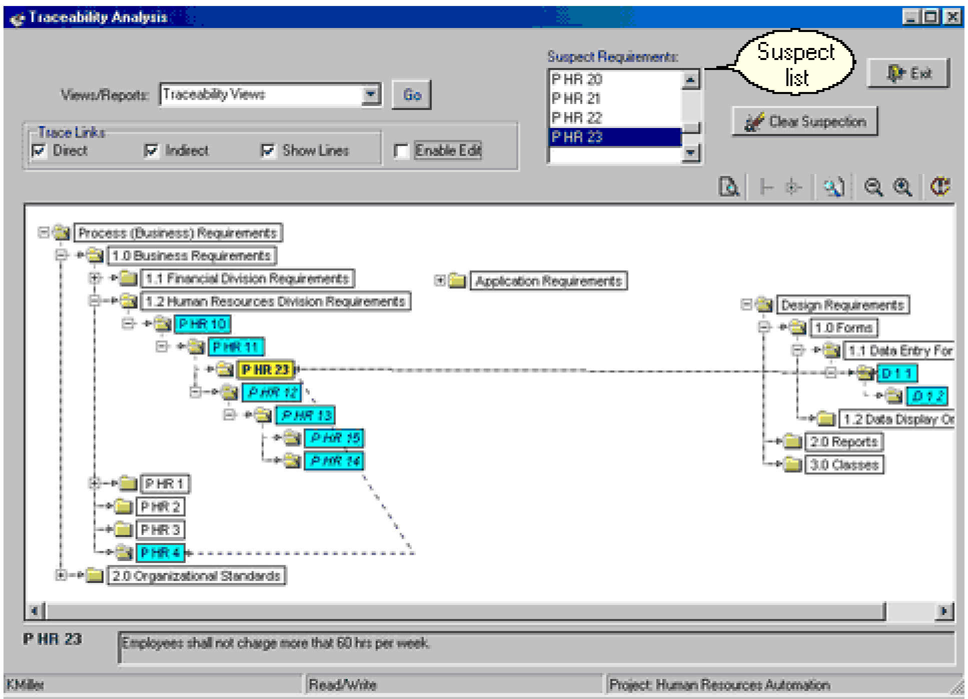
Analyst Pro shows the impacted requirements by highlighting them with different colors and fonts. This allows easy differentiation of selected, directly affected, and indirectly affected requirements.

Selected Requirement: Yellow color with Bold font.

Directly Affected Requirements: Blue color with Regular font.

Indirectly Affected Requirements: Blue color with Italic font.

You will be able to print the view and analyze the impact of a requirement change.



To Clear a Requirement from the Suspect list

1. Select the **Requirement** in the suspect list.
2. Click on the **Clear Suspection** button.

5.6.3 Traceability Reports

Traceability Reports are useful for analysing requirements not linked to other classes of requirements including:

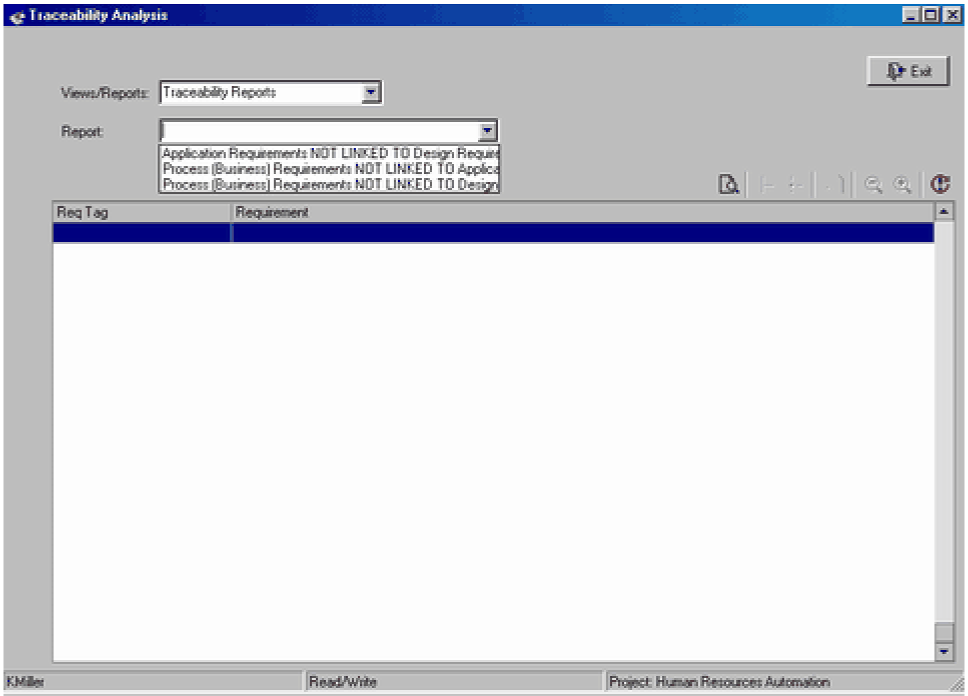
1. Application requirements *not linked to* Design Requirements
2. Process (business) requirements *not linked to* Application Requirements
3. Process (business) requirements *not linked to* Design Requirements

To Generate Reports

Reports can be generated in two very simple steps.

1. Select **Traceability Reports** in **Views/Reports** list box
2. Select a **Report** from the **Report** list box.

You will be able to print the reports. To customize reports, refer to Customizing Analyst Pro.



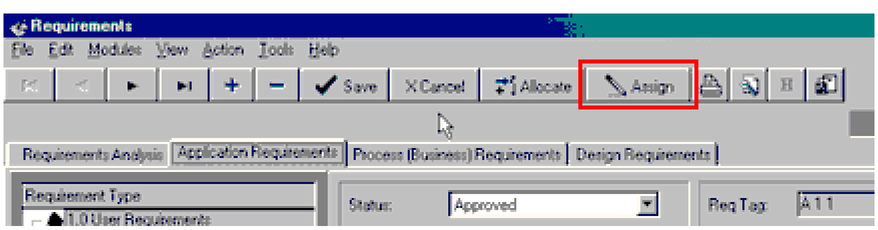
5.7 Requirements Workflow

Analyst Pro provides this optional module for assigning requirements and for viewing assigned requirements. When requirements are assigned to team members, Analyst Pro sends auto email by option. Users are able to view their work assignments through *View Assigned Work.*

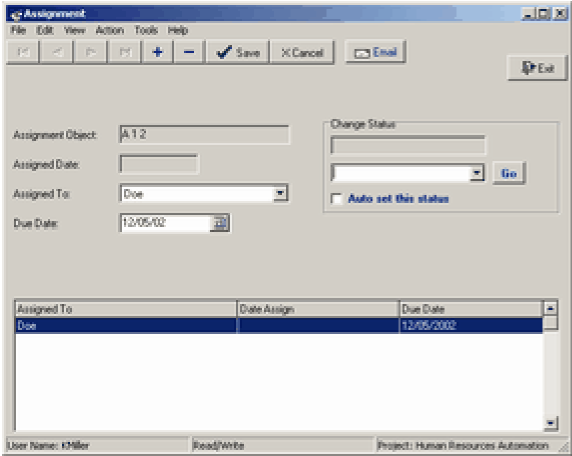
5.7.1 Assigning Requirements

To Assign a Requirement

1. Select a **Requirement** in the **Requirements** module.
2. Click on the **Assign** Button.



The following screen appears:

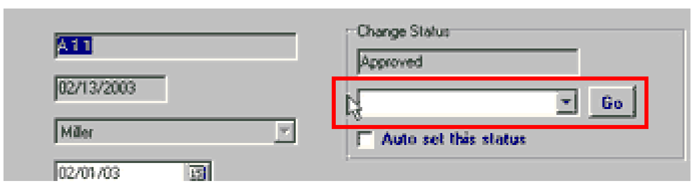


3. Click on the **Add** button  to assign to a new user.
4. Enter the **values** for **Assigned To** and **Due Date**.
5. Click on the **Save** button  to save the record. It automatically generates email if **Auto Create Email on Assignment** is selected in project options.

To Change Status on Assignment

If you want to change the status of a requirement after assignment, perform the following steps:

1. Select the **Status** in the **Change Status** dialog.

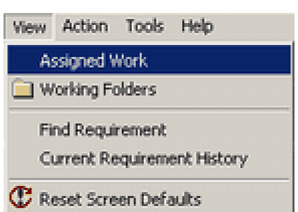


2. Click on **Go**.

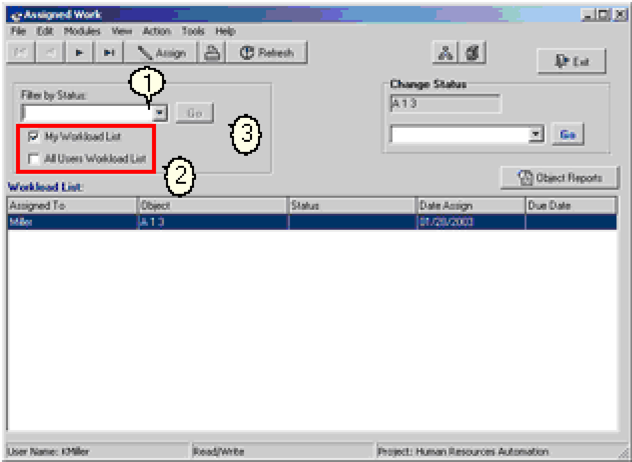
*Note: If you want to change this status every time a requirement is assigned, check the **Auto set this status** check box.*

5.7.2 Viewing Assigned Work

Users can view their assigned work and change its status. This module can be viewed using **View → Assigned Work**.



When **Assigned Work** is clicked, the following screen appears:



Reviewing Assigned Work

1. Select **Filter by status**, if you want to filter.
2. Select **My Workload List** or **All Users Workload List** (available if you have assignment privileges).
3. Click on **Go**.

Removing Work from Workload list

After finishing an assigned work task, you can remove the object (requirement) from your list by changing the status.

5.8 Managing Attributes

Attributes are important for effective Requirements Management and tracing. Analyst Pro provides two types of attributes. They are *standard* and *custom* attributes. Standard attributes are predefined by the system. Users can enter their own attribute values.

In addition to standard attributes, users are able to define their own custom attributes. This chapter covers both of these types of attributes.

5.8.1 Standard Attributes

In this section, you will learn how to create and assign the *Status, Priority, Process (Business) Requirements Type,* and *Design Requirements Types* attribute values. The Status and Priority attribute values are shared across Application, Process (Business) and Design requirements, while the Process (Business) Requirements Type is only applied to Process (Business) Requirements, and the Design Requirements Type is only applied to Design Requirements.

Once you create and assign the attribute values, you can manage each requirement using the assigned attribute values. For example, you can use the attribute values as search criteria when searching for requirements. Or, you can use one or more attributes as a filter to generate reports. (The section titled Working with Requirements List discusses filtering and generating reports.) In this section you will also learn how to specify default values that will automatically be applied when you create or import a requirement.

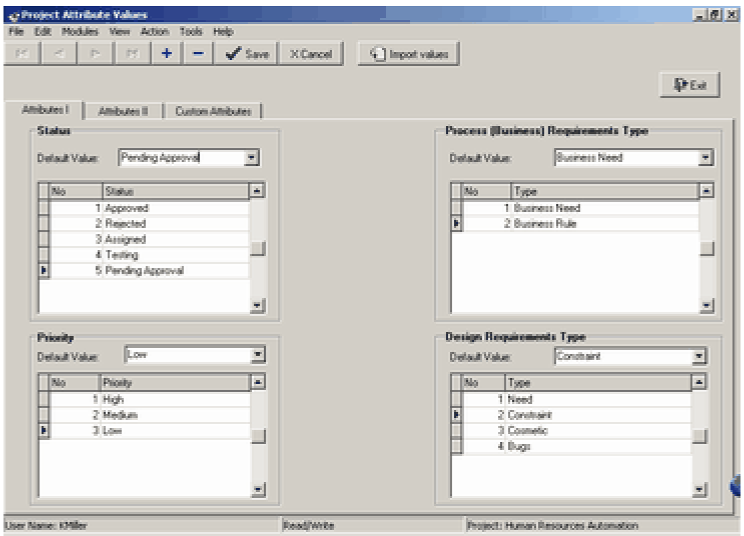
Note: If you have already created an Analyst Pro project and you have added attribute values, see the section titled Importing Attribute Values to quickly import attributes from another Analyst Pro project.

5.8.1.1 Adding Attribute Values

Every requirement is managed and tracked by a set of attributes, which include Release, Status, Priority, Author, Source, etc. Attribute values can be set using the **Attributes I** and **Attributes II** tabs.

To Add Attributes I Values

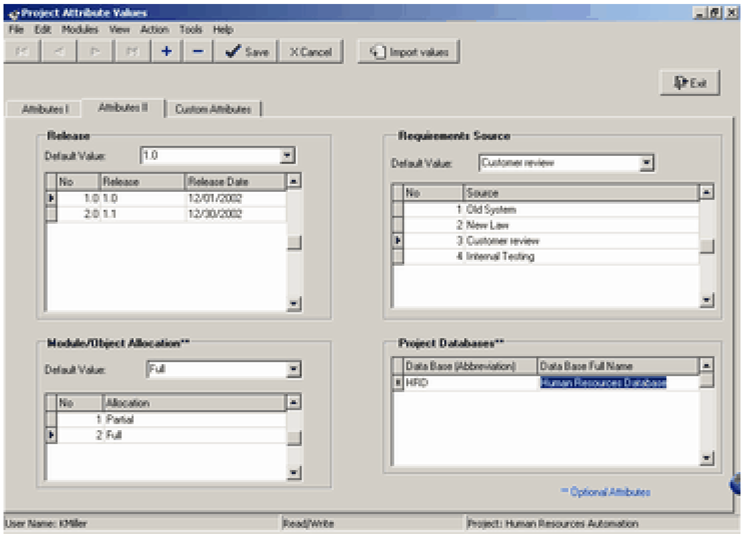
1. Select an **Attribute** grid.
2. Click the **Add** button  to enter the values for the attribute.
3. In the Attribute grid, enter desired **Values**.



4. Click **Save** button  to save values.
5. To enter more values, click the **Add** button  or use the **Enter** key on your keyboard when the cursor is in the last row and last column.

To Add Attributes II Values

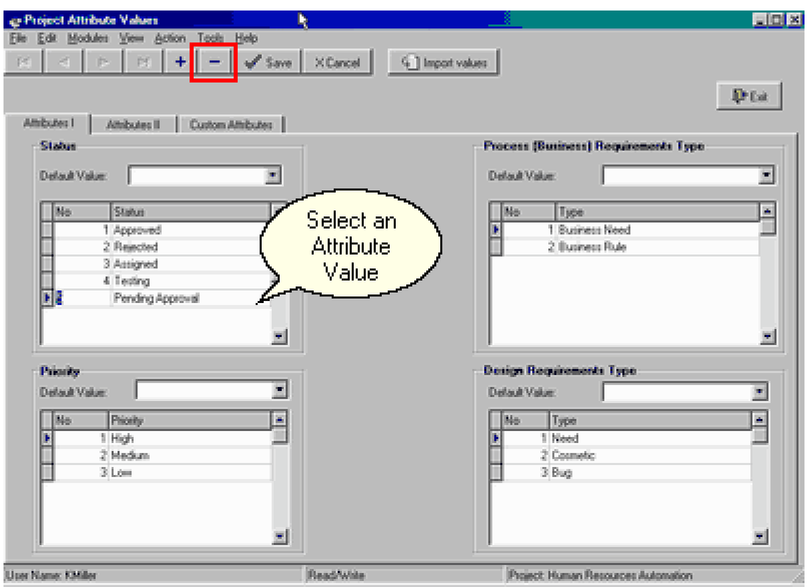
1. Click the **Attributes II tab**.
2. Enter the **Release, Requirements Source, Module/Object Allocation**, and **Project Databases** values exactly as explained above for Adding Attribute I Values.



5.8.1.2 Deleting Attribute Values

To Delete Attribute Values

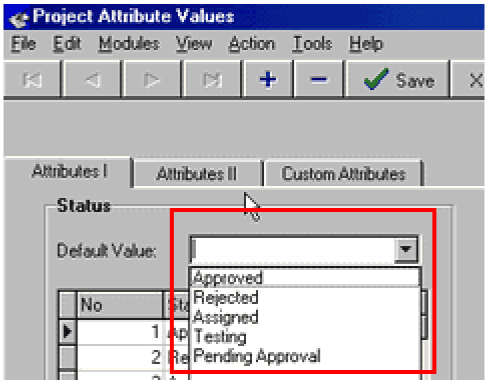
1. Select an **Attribute Value** that needs to be deleted.
2. Click on the **Subtract** button .



5.8.1.3 Setting Default Attribute Values

This feature makes Requirements Management easier than most conventional systems.

Every attribute has a Default Value drop-down list. Select **Default Attribute Values** from each drop-down menu to enter the values you wish to be used as the standard for your system.



The chosen values will be assigned automatically when a new requirement is created.

5.8.2 Custom Attributes

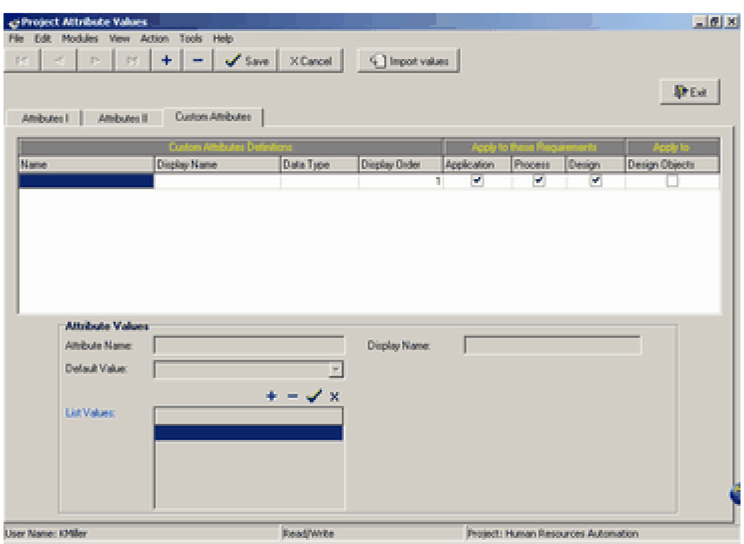
Analyst Pro provides a **Custom Attributes** module that enables you to define custom attributes for your project. The attributes you create may be applied to *Application Requirements, Design Requirements Business (Process) Requirements,* or *Design Objects*.

For example, if you want to estimate requirements cost, then you can add Custom Attribute Estimation.

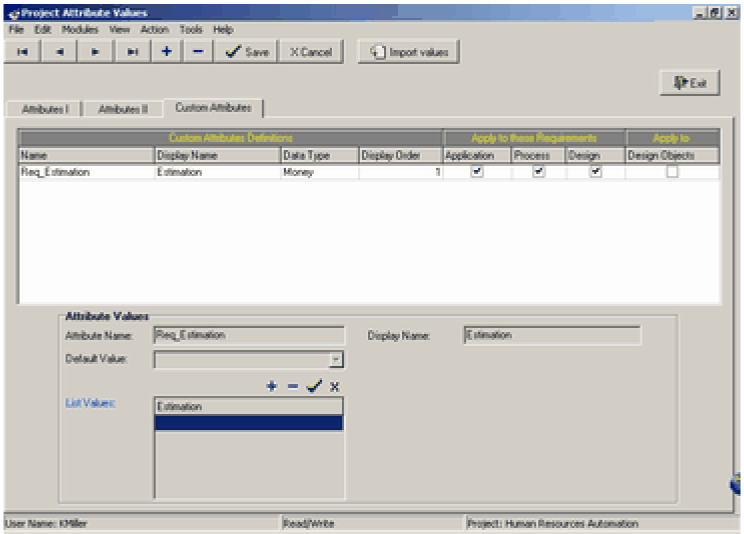
5.8.2.1 Adding Custom Attributes

To Add Custom Attributes

1. Click the **Add** button + to enter the values into the system. The cursor appears in the **Custom Attribute Definitions** column, in the **Name** field.
2. Enter information for the **Custom Attribute**.
3. Click on **Save**.



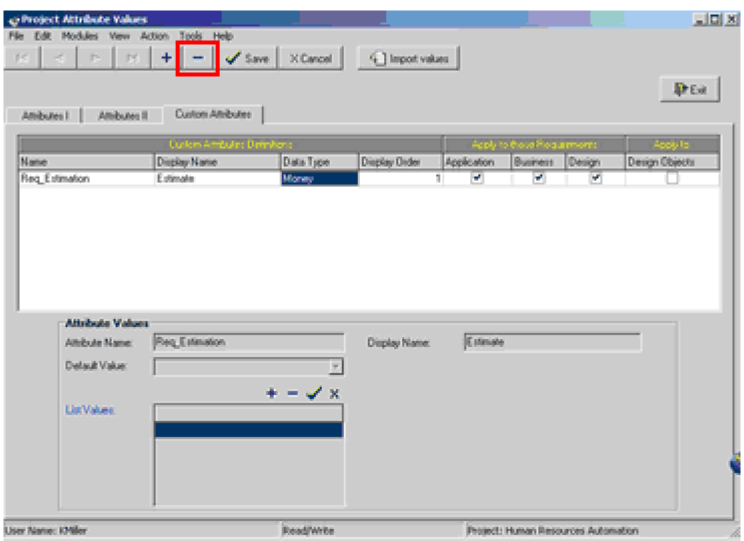
Note: If you select List as the Data Type, you will need to enter information in the Attributes Values group box.



5.8.2.2 Deleting Custom Attributes

To Delete a Custom Attribute

1. Select an attribute that needs to be deleted.
2. Click on the **Subtract** button .



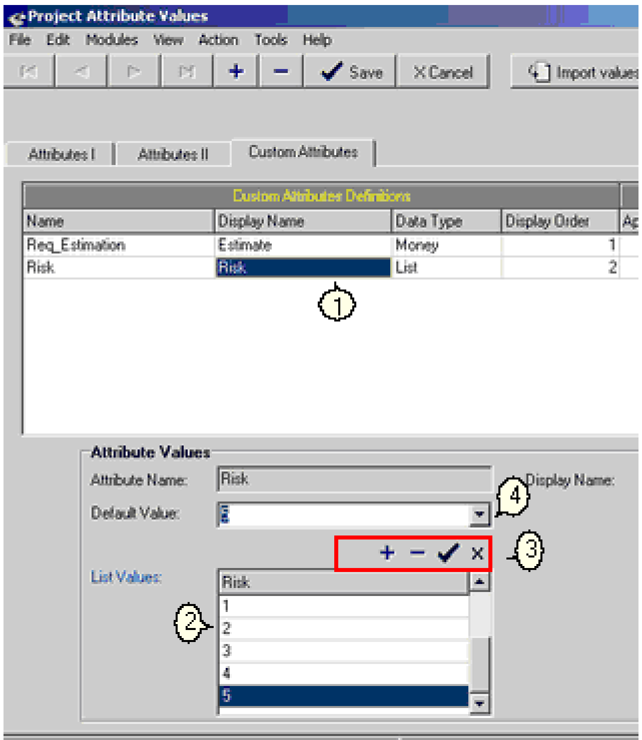
Note: Once a custom attribute is deleted, it cannot be restored. Instead, you may uncheck requirements classes and design objects.

5.8.2.3 Adding Values for List Attribute Type

To Add Values for List Attribute Type

1. Select a **Custom Attribute** from the grid that is of type List.

2. Enter values in the **List Values** grid.
3. To enter values use the **Add** button . To delete values use the **Subtract** button .
4. Select a **Default Value** to automatically populate when a record (requirement) is created.



Chapter VI
Managing Files & Diagrams

6 Managing Files & Diagrams

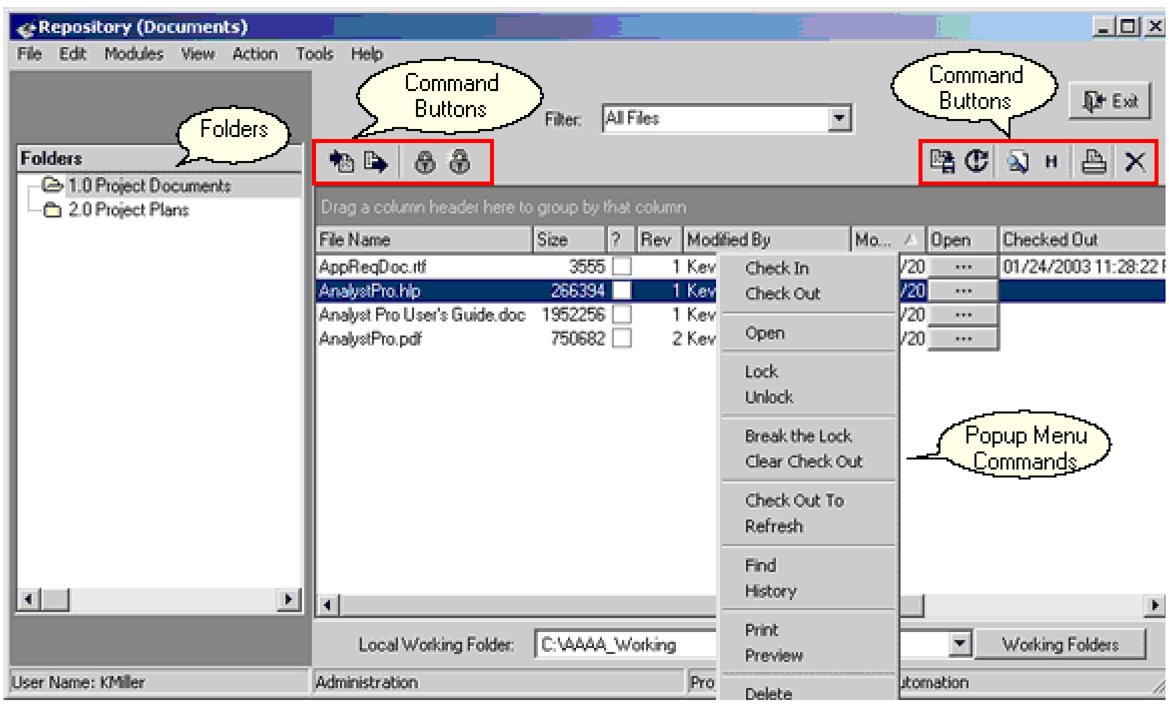
This chapter covers the fundamentals of managing project files and diagrams. Project files can be managed with the built-in Analyst Pro *Repository*, and you can create project diagrams with built-in *Diagram Tools*.

Separate sections provide detailed information on the each of these features.

- Repository covers the creation, configuration management, synchronization, deletion, and restoration of project folders and files using the **Repository** feature.
- Diagrams covers the creation of flow chart and network diagrams with Analyst Pro's integrated **Diagram Tools**.

6.1 Repository

You can use Analyst Pro's solid new *Repository* feature to store and manage any type of document. Documents stored here can be linked to any requirement by using the **Ref & Links** features. This section covers different features and rules for working with the Repository.

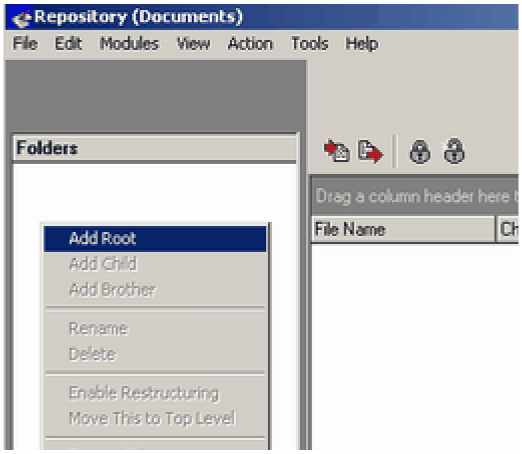


6.1.1 Managing Folders

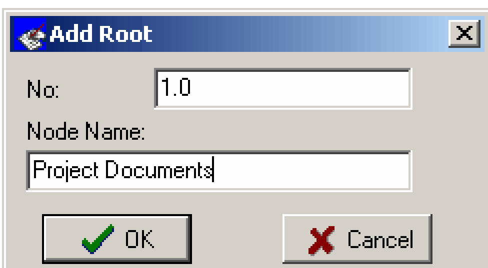
Before adding files to the **Repository**, you need to create folders.

To Build a Folder

1. Right click in the **Folder Tree**. A Pop-Up menu appears.

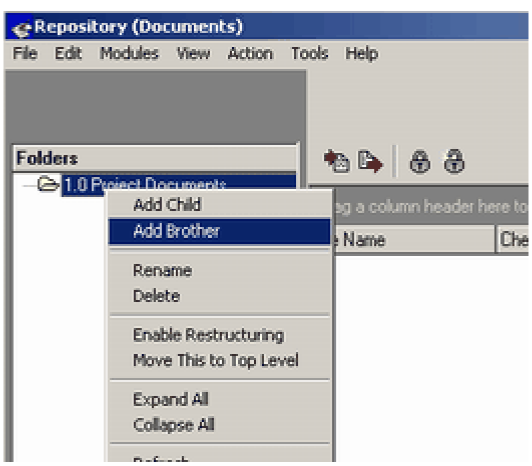


2. Click on **Add Root**. The **Add Root** window appears.
3. Enter a **No.** and a **Node Name** for the Folder.
4. Click on **OK**. The Folder is added to the Repository.

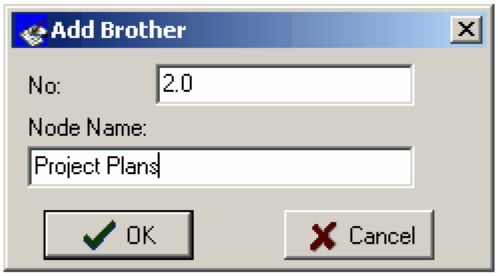


To Add More Folders

1. Right Click in the **Folder Tree**. A pop-up menu appears.
2. Select **Add Child** or **Add Brother**. The **Add Child** or **Add Brother** window appears.



3. Enter a **No.** and a **Node Name** for the Folder.



4. Click on **OK**. The Folder is added to the **Folder** field.

*Note: To Rename a Folder, highlight the folder and right click. Select **Rename**, and enter a new name for the Folder.*

*Note: To Delete a Folder, highlight the folder and right click. Select **Delete**, and confirm your deletion.*

5. To Rearrange Folders, refer to Restructuring Trees.

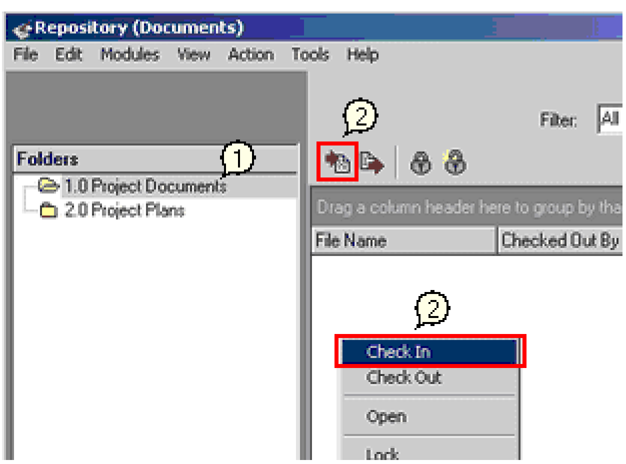
6.1.2 Managing Files

This section covers the basics of managing files in Analyst Pro's Repository, including c*hecking files in and out, locking and unlocking files, refreshing files, finding files, displaying history,* and *printing and deleting files*.

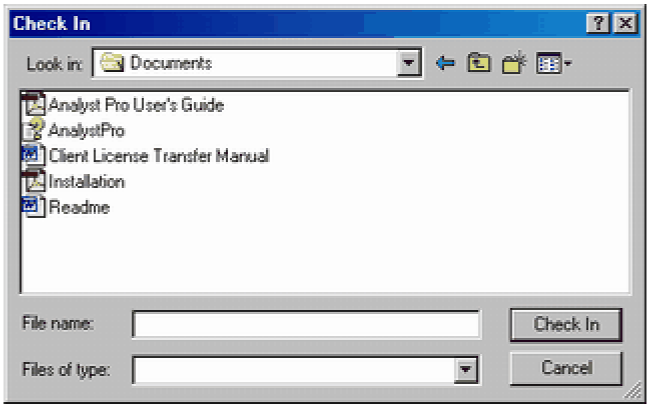
6.1.2.1 Check In

To Check In Files

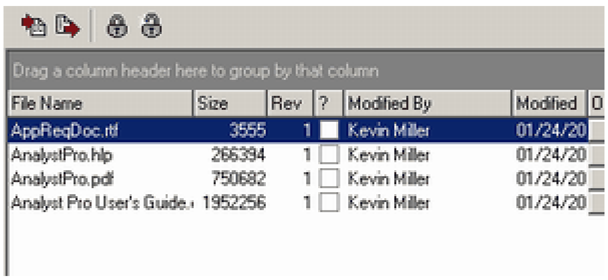
1. Select a **Folder**.
2. Select **Check In** from the tool bar button or menu. The following screen (dialog box) appears:



3. Select the **files** you want from the dialog box and click **Check In**. To select multiple files, use the **Shift** key. The files are checked into the Repository.



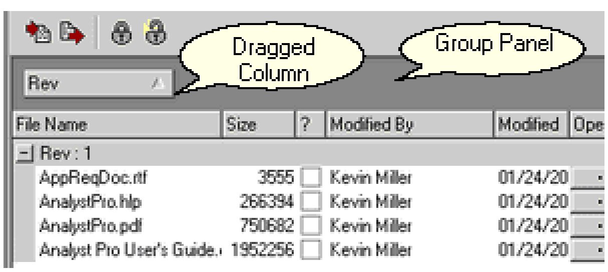
Each time you check in a file, Analyst Pro tracks filename, size, revision (Rev), Modified by, Modified Date, and Create Date.



Sorting & Grouping Files

To sort files, click on the column header.

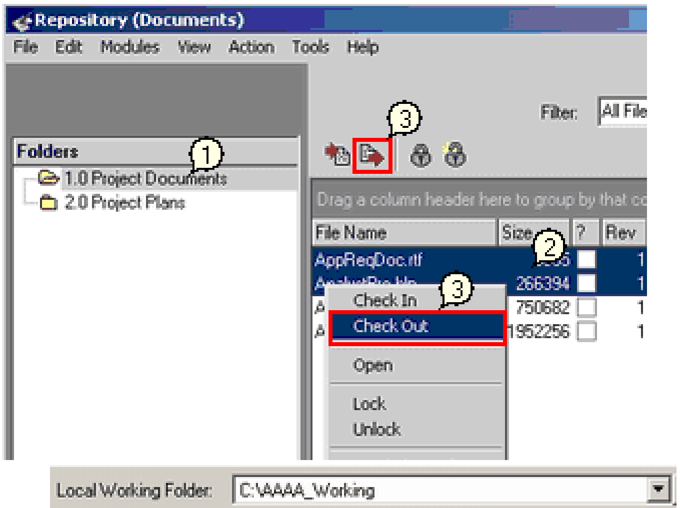
To group by columns, simply drag that column header into the top group panel.



6.1.2.2 Check Out & Check Out To

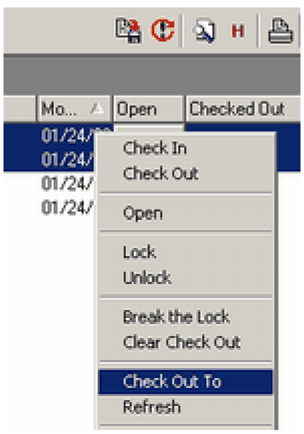
To Check Out Files to the Local Working Folder

1. Select the **Folder** containing the file which you wish to check out.
2. Select a **file** or **files** from the list. To select multiple files, use the **Shift** or **Ctrl** key.
3. Check out files using the **Check Out** button in the tool bar or the pop-up menu's **Check Out** command. To check out, your local working folder needs to be set up.

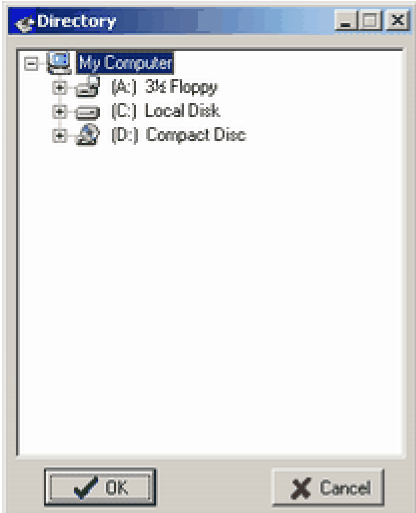


To Check Out Files Other Than to the Local Working Folder

1. Select **files**.
2. Click on **Check Out To** on the tool bar or pop up menu.



The following screen (dialog box) appears:



3. Select a **Directory**.
4. Click on **OK** to save files into that directory

6.1.2.3 Files Configuration Management

Analyst Pro provides secure configuration management of files or documents by locking files.

Auto Locking

Whenever a document is checked out for the first time, it is auto-locked. Auto-locked files can be checked out by other users but cannot be checked in unless the auto-lock is cleared. Only the user checking out the document and users with administrative privileges can clear the lock.

Explicit Locking

In addition to this, Analyst Pro provides an explicit locking mechanism. This allows you to lock files exclusively. Other users can check out files but cannot check files in. Only the administrator and locking users can break the lock. Locking users can check in the files without unlocking files.

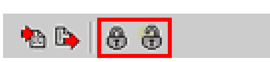
Version Control

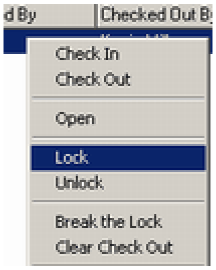
Analyst Pro provides automatic version control. Every version of the file is saved in the database. User are able to revert to any version of a document at any time.

Instructions below cover locking and unlocking files, and version control.

Locking & Unlocking Files

1. Select a **file** or **files** in the grid.
2. Click on the **Lock** or **Unlock** command from either tool bar or pop-up menu.

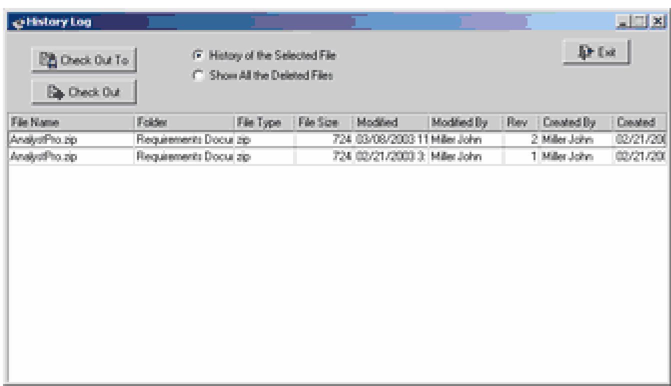




Version Control

Analyst Pro automatically maintains version control of files. The change history of files can be accessed using the **History** button  in the toolbar or pop-up menu option.

The following screen appears. The **History Log** contains all versions of a document. It is possible to revert to any version of the document by using the **Check Out** button from this screen and checking the file in from the **Repository** module.

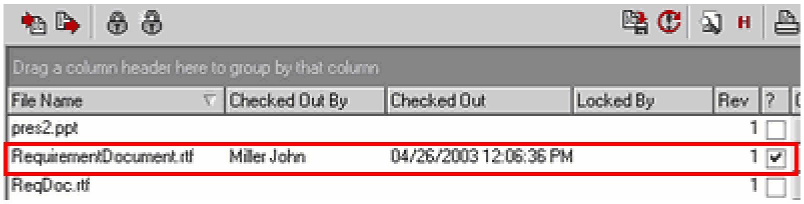


*Note: When you click on the **Check Out** button, files are checked out to the Local Working Folder selected in the Repository module. If you have not selected Local Working Directory, click on **Check Out To** to check out to a different folder.*

6.1.2.4 Files Synchronization

Analyst Pro allows you to check files out from the Repository anytime and into your local working directory, so you can modify them. However, it is important to note that if you now modify checked-out files in your local directory, then they are out of sync with the existing files in the Repository.

In the Repository, Analyst Pro provides you a visual cue to identify out-of-sync files by automatically checking the (?) field. A glance down the file list will help you identify all recently-modified and out-of-sync files. In order to synchronize these files, you can check them in.

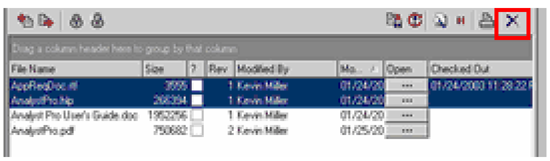


Note: Analyst Pro also displays files as out-of-sync if other users have modified and updated the Repository.

6.1.2.5 Deleting & Finding Files

To Delete Files

1. Select **file** or **files** in the grid. To select multiple files, use the **Shift** or **Ctrl** key.
2. Click **Delete** button or **Delete** pop-up menu command.



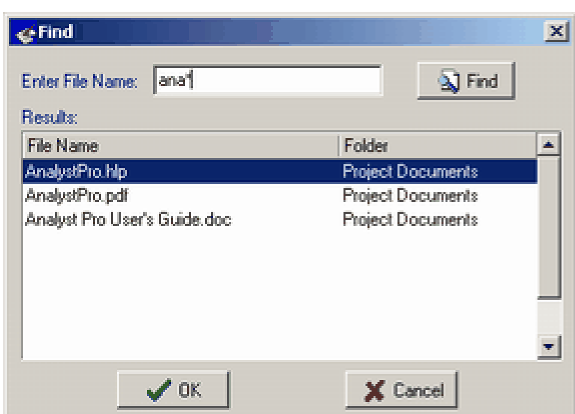
The deleted documents are not fully purged from the system.

To fully purge files from the system, go to history screen by clicking the **History** button H.

1. Select **Show All Deleted Files.**
2. Select the documents you want to delete and click on the **Purge Deleted Files** button.

To Find Files

1. Click the **Find** button.
2. Enter part of the file name and click the **Find** button.



3. Select a file from the results list and click **OK** to locate that file.

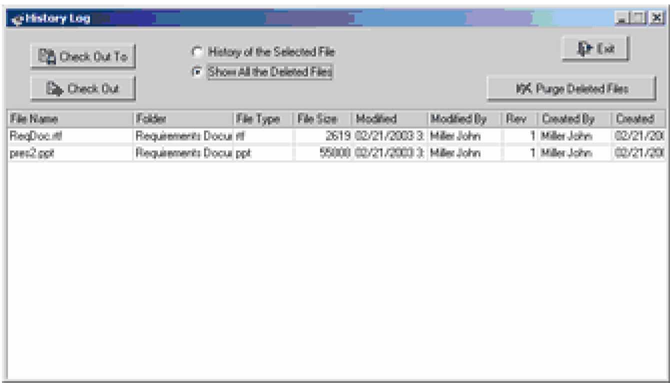
6.1.2.6 Restoring Deleted Documents

Analyst Pro allows to you restore documents that are deleted from the Repository. Any document can be restored as long as it is not fully purged from the system.

To Restore a Document

1. Click on the **History** button  in the **Repository** module.
2. Select the **Show All Deleted Files** option.
3. Select the **document** you want to restore. Check out to a local folder.

Close the screen and go to the **Repository** screen. Follow the steps from **Check In** to check the document back in.



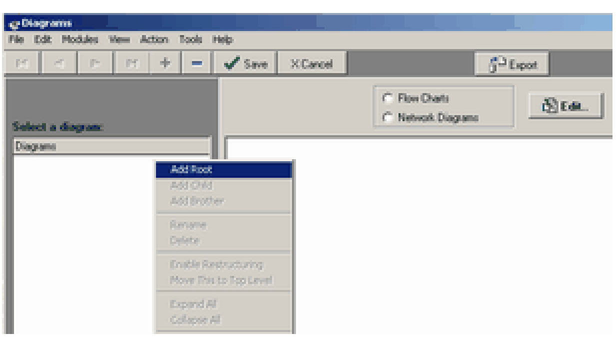
6.2 Diagrams

Analyst Pro offers integrated drawing tools to aid you in visual modeling of your systems. This chapter covers flow chart diagrams and using network diagram tools. These diagram tools can be accessed from the Diagrams module.

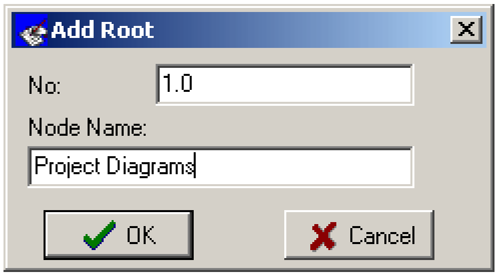
Before creating diagrams, you first need to create a **Diagrams List**.

To Build a Diagrams List

1. Right click in the **Diagrams** field. A pop-up menu appears.



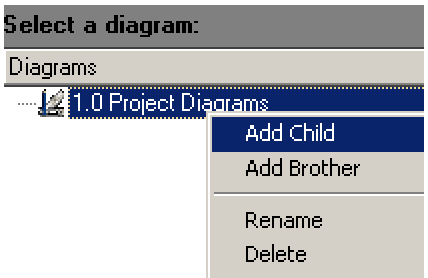
2. Click on **Add Root**. The **Add Root** window appears.



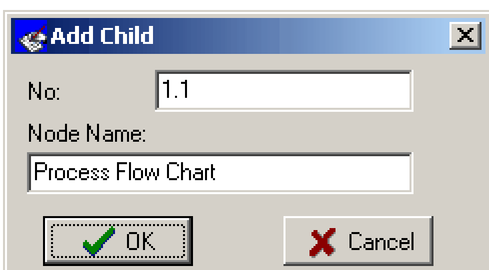
3. Enter a **No.** and a **Node Name** for the Diagram.
4. Click **OK**. The Diagram is added to the **Diagrams** list.

To Add More Diagrams

1. Right-Click in the **Diagrams** field. A pop-up menu appears.



2. Select **Add Child** or **Add Brother**. The **Add Child** or **Add Brother** window appears.



3. Enter a **No.** and a **Node Name** for the Diagram.
4. Click **OK**. The Diagram is added to the **Diagrams List**.

Note: To Rename a Diagram, highlight the Diagram and right click. Select Rename, and enter a new name for the Diagram.

Note: To Delete a Diagram, highlight the Diagram and right click. Select Delete, and confirm your deletion.

5. To Rearrange the **Diagrams List**, refer to Restructuring Trees.

6.2.1 Flow Charts

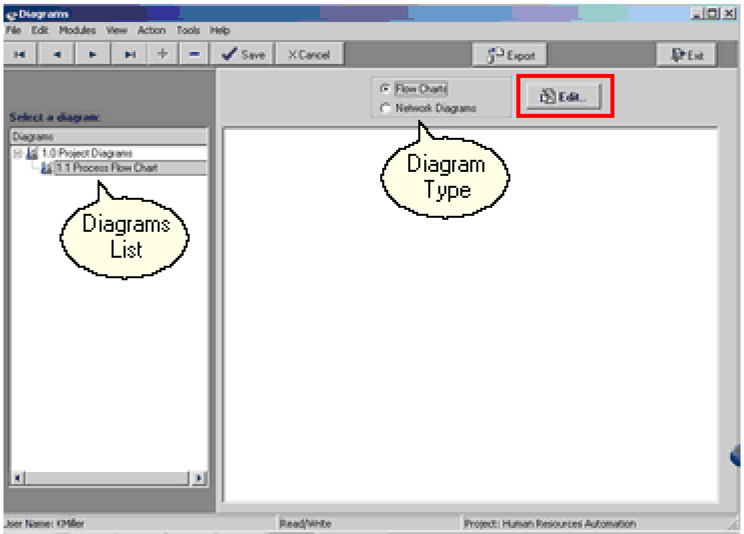
This section covers the basics of drawing flow charts, including drawing shapes, objects, connectors, and borders.

To Create Flow Charts

1. First select a diagram from your **Diagrams** List, then select the **Flow Chart** button in **Diagram**

Type.

2. Click on the **Edit** Button. The **Flow Chart Editor** appears.

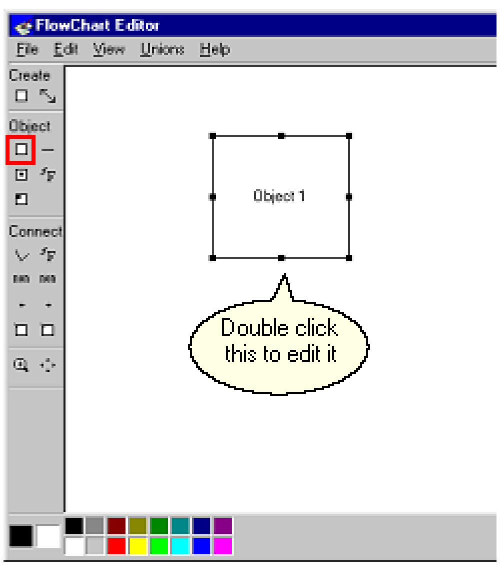


To Create Objects and Lines

1. Click the square under **Create** to establish an object or click on the line to draw lines and arrows (connections).

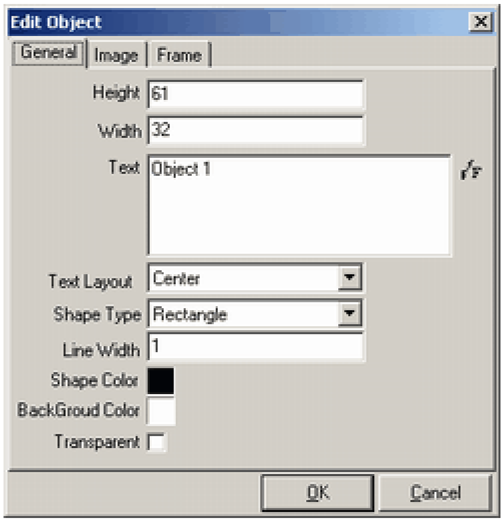
Edit an Object

1. Double click the object to launch the **Edit Object** tool. Alternatively, select the object and click the **rectangle tool** under the **Object** toolbar to change the shape.



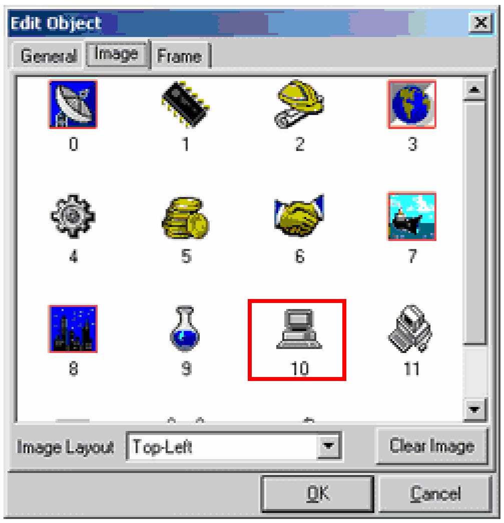
Change Object Attributes

Edit Object/General Tab: To change the title of the object or any of the other attributes of the object, click on the **object** to select it, then right click to choose **Properties**. The **Edit Object** pop-up window will appear. Under the **General** tab, make the changes desired, and click on the **OK** button to store changes.

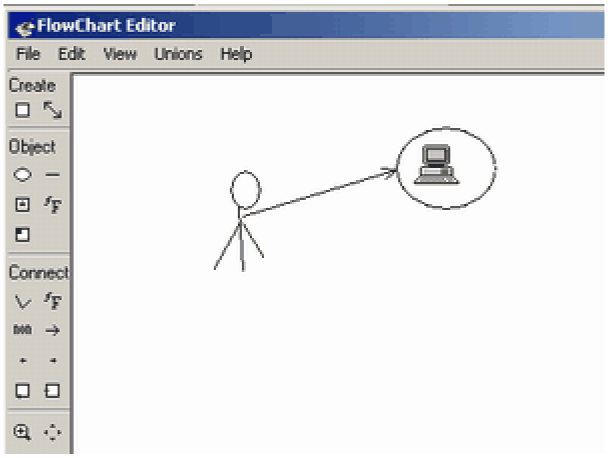


Select Icons for Inclusion

Edit Object/Image Tab: From the **Image** tab, you can select icons for inclusion in your diagram. Use the **Image Layout** drop-down menu to select the position of the icon within the selected diagram object. Click on the **OK** button to save changes.

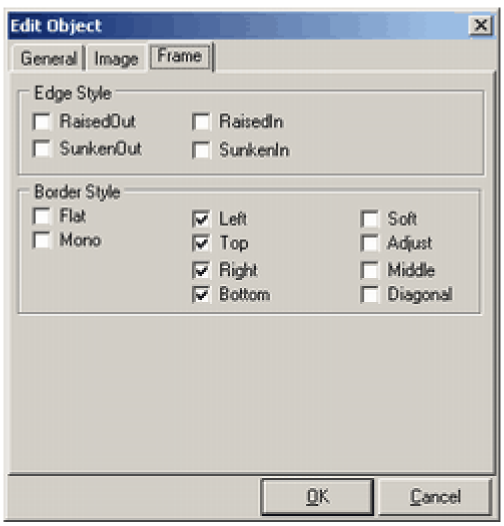


Example: Icon 10 from the above selection was chosen for use in this diagram, below.



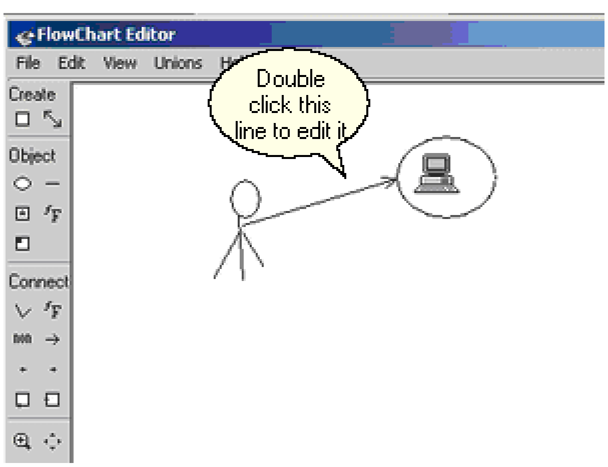
Modify Edges and Borders

Edit Object/Frame Tab: From the **Frame** tab, you can modify the **Edge** and **Border** Styles. Simply select the **edge** and **border styles** that you prefer and click on the **OK** button to save changes.

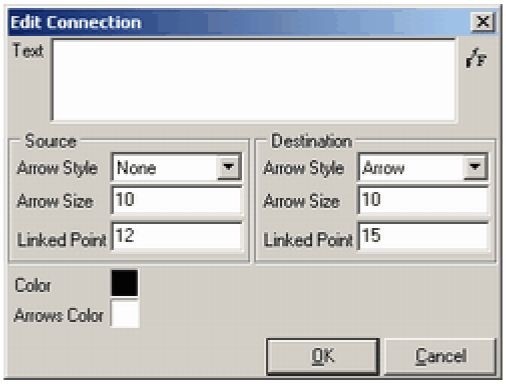


Edit Connections

Select a **line** between two objects and double-click on it to launch the **Edit Connection** editor.



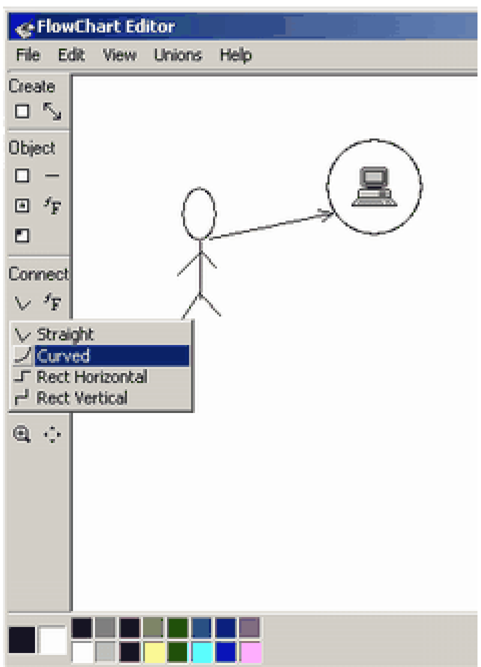
The **Edit Connection** pop-up window will appear. Change the properties as desired, and click **OK** to save changes.



Create Squiggly Lines

To connect objects using other than a straight line, follow these steps:

1. Select the **line** between the objects.
2. Select the shape of the connecting line from the pop-up menu under **Connect**.
3. Drag the **mouse pointer** in the direction that you want the line to take.



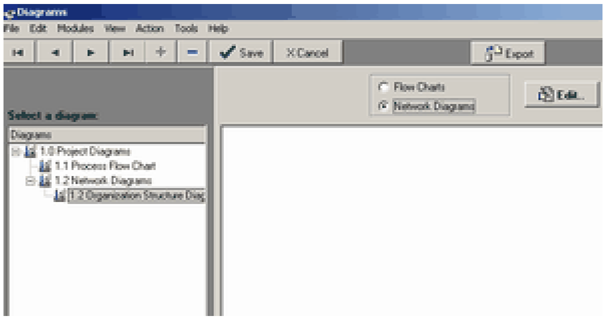
6.2.2 Network Diagrams

This section covers the basics of drawing network diagrams, including drawing and editing shapes and child objects.

To Begin

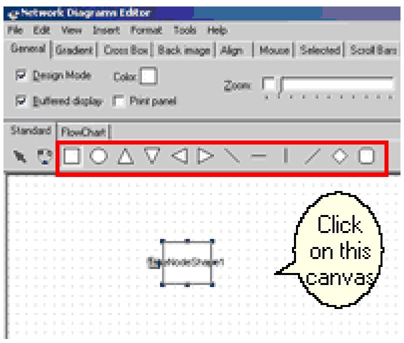
1. Select **Diagram** from the **Diagrams** list.
2. Set **Diagram Type** to **Network Diagrams**.

3. Click on the **Edit** Button. The following editor appears:

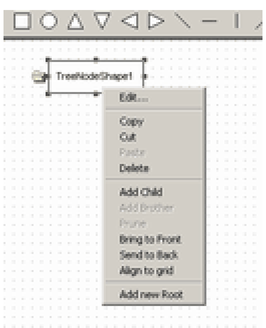


To Build Hierarchical Diagrams

Select an object from the tool bar. Place it on the canvas by clicking on it.

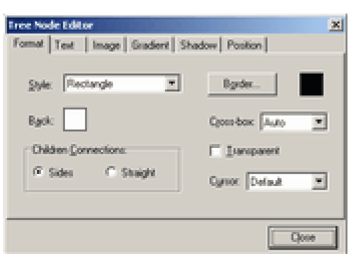


1. Right click on an **object**.
2. Select the **Add Child** option to create a **Child Object**.



To Change Object Properties

1. Double-click on an **object**.
2. Use the editor for changing format, text, image, gradient, shadow, and position of the object.
3. Select the appropriate **tab** to change properties. It is self-explanatory.



Chapter VII
Managing Output

7 Managing Output

This chapter covers the fundamentals of managing various kinds of output from Analyst Pro, including *documents, requirements history reports, graphs,* and *other reports.*

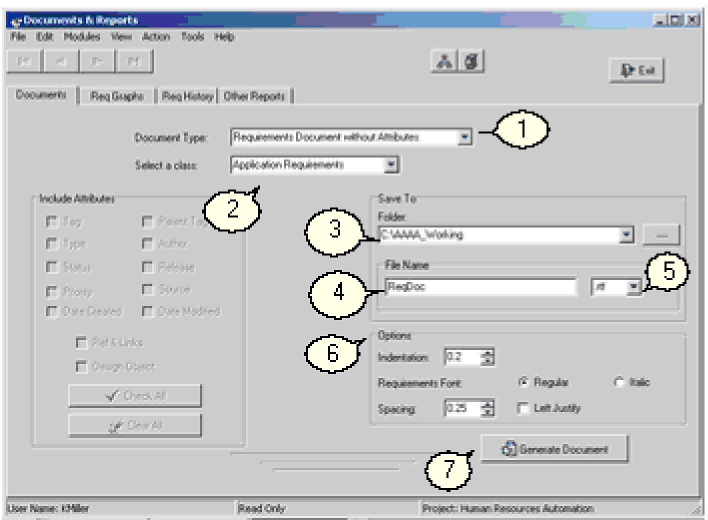
Separate sections provide detailed information on generating different kinds of output.

- Documents covers how to generate different requirements documents, Design object lists, and project details.
- Requirements Graphs covers how to generate requirements graphs as line graphs, bitmaps, or pie graphs.
- Requirements History covers how to generate history reports detailing requirements evolution and change.
- Other Reports covers how to generate pre-built and filtered reports of requirements with links.

7.1 Documents

Analyst Pro allows you to generate documents that include *Requirements Documents without Attributes, Requirements Documents with Attributes, Design Object Lists,* and *Project Details.* Analyst Pro makes requirements document generation extremely simple. With a few clicks, a Requirements Document can be generated.

To Generate Requirements Documents without Attributes



1. Select **Requirements Document without Attribute** as Document Type.
2. Select a **Class**.
3. Select a folder to **Save** to.
4. Enter the **File Name**.
5. Select your **Output Format**.
6. Select an Option.

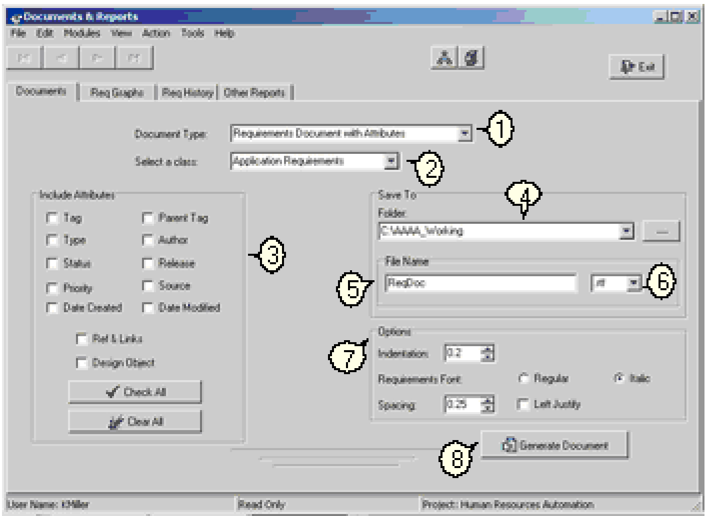
   Indentation: Hierarchical indentation between **Parent and Child Requirement** .

   Requirement Font: Requirements Font

Spacing: Space between **Req No and Requirement**.

7. Click on **Generate Document**.

To Generate Requirements Documents with Attributes



1. Select Document Type as **Requirements Documents with Attribute**.
2. Select a **Class**.
3. Select **Attributes** that need to be included in the document.
4. Select a folder to **Save** to.
5. Enter the **File Name**.
6. Select your **Output Format**.
7. Select an Option:

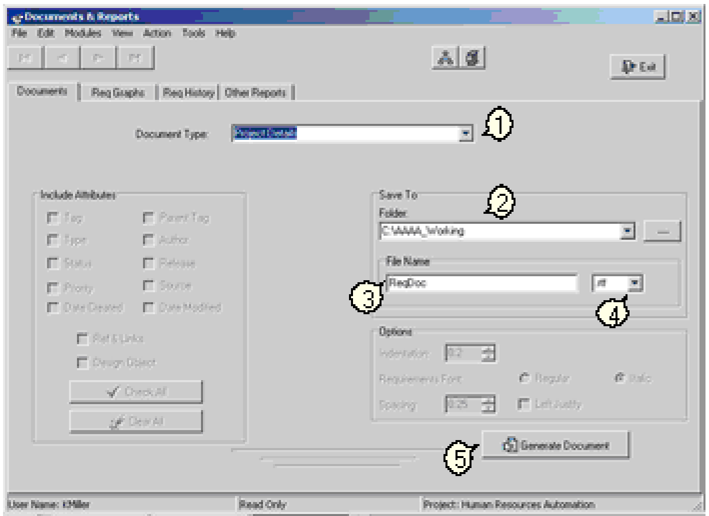
   Indentation: Hierarchical indentation between **Parent and Child Requirement**

   Requirement Font: Requirements font

   Spacing: Space between **Req No. and Requirement**.

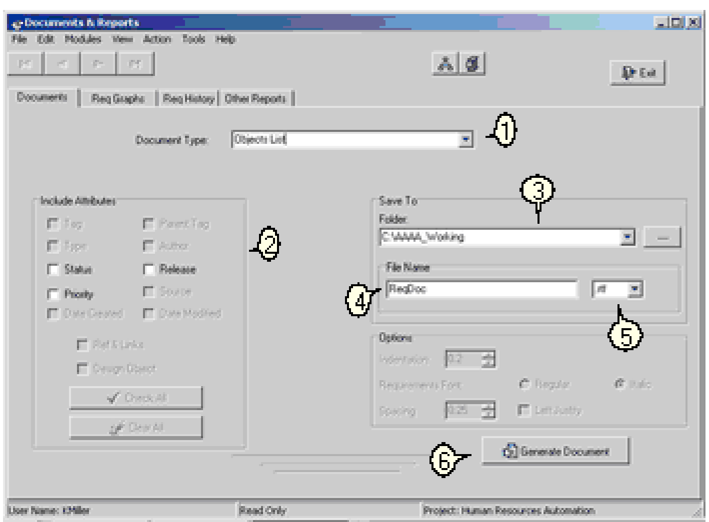
8. Click on **Generate Document**.

To Generate Project Details Document



1. Select **Project Details** as Document Type.
2. Select a folder to **Save** to.
3. Enter the **File Name**.
4. Select **Output Format**.
5. Click on **Generate Document**.

To Generate Object List Document



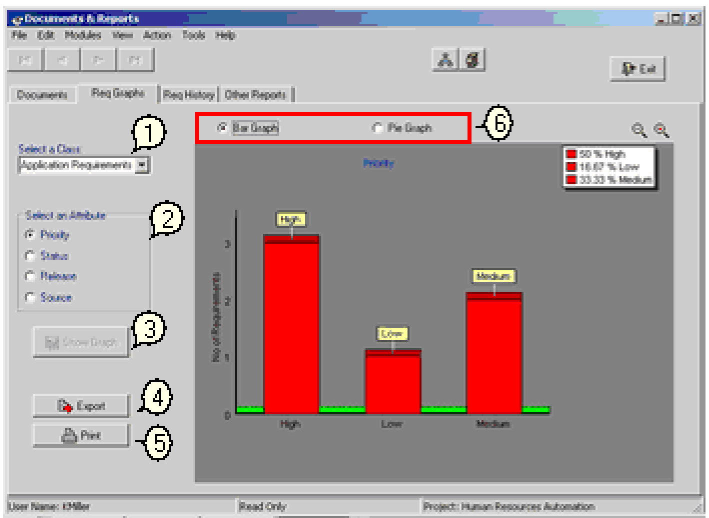
1. Select **Design Object List** as document type.
2. Select **Attributes** to include in the output.
3. Select a folder to **Save** to.
4. Enter **File Name**.
5. Select **Output Format**.
6. Click on **Generate Document.**

7.2 Req Graphs

This section details how to generate **Requirement Graphs**.

To Generate Requirements Graphs

1. Select a **Class**.
2. Select an **Attribute**.
3. Click on the **Show Graph** button to display graphs.
4. Click on the **Export** button to save the Graph to a file as a bitmap.
5. Click on the **Print** button to send the Graph to the printer.
6. To display a pie graph, select the **Pie Graph** option.

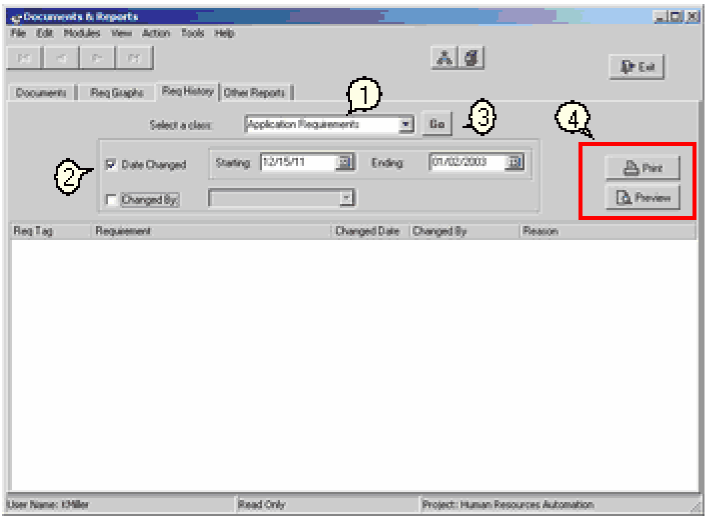


7.3 Req History

Analyst Pro provides a very powerful *Requirements Change Management* feature which automatically tracks requirements changes. In this sub-module, you will be able to generate history list and reports.

To Generate Requirements History List and Reports

1. Select a **Class**.
2. Select a **Filter** if you want to filter the history.
3. Click on the **Go** button to generate a list.
4. Click on the **Print** or **Preview** button to print or preview the report.

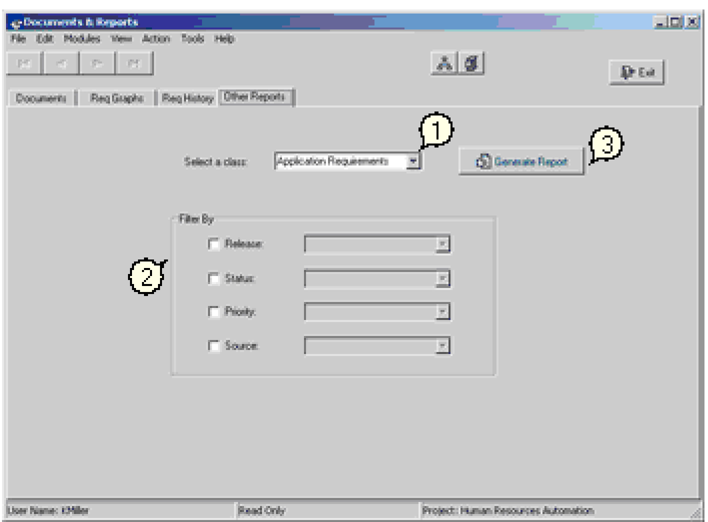


7.4 Other Reports

Analyst Pro provides pre-built reports for requirements. These reports provide requirements with their linked requirements information.

To Generate a Report

1. Select a **Class**.
2. Select a **Filter** if you want to filter the data.
3. Click on the **Generate Report** button to generate the report.



Chapter VIII
Customizing Analyst Pro

8 Customizing Analyst Pro

This chapter covers the fundamentals of how to customize screens and reports in Analyst Pro to aid in your company's unique project management style and methodology.

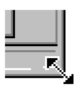
Separate sections provide detailed information on customizing screens and reports.

- The Screens section covers how to customize screens and restore default views.
- The Reports section covers how to customize list reports and reset defaults.

8.1 Screens

To Customize Screens

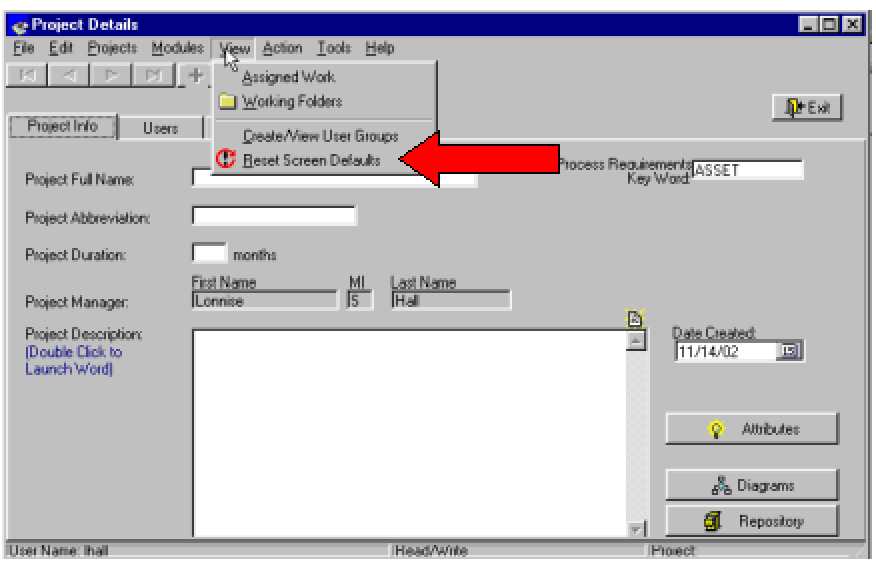
1. Log into the system.
2. Open the desired window.
3. Place the mouse pointer over any edge of the window until the pointer has an arrow on both ends, as shown in the following picture:



4. Press the left mouse button and drag the edge of the window inward to make the window smaller. Or, drag the edge of the window outward to make the window larger.

To Restore Screen Defaults

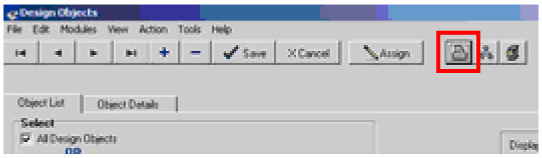
You can restore the window to its default size by selecting **View** from the window's menu bar. Then select **Reset Screen Defaults** from the **View** menu, as shown below.



8.2 Reports

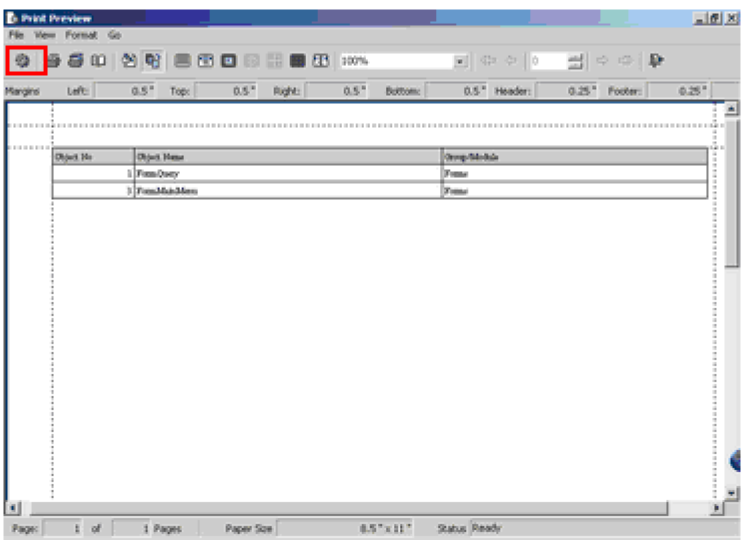
Analyst Pro allows you to customize list reports. In order to customize reports, you need to preview a report instead of printing it. In the following example, we show the steps to follow to customize an object list report. This is applicable to all other reports such as requirements list report, history report, etc.

To Customize Reports



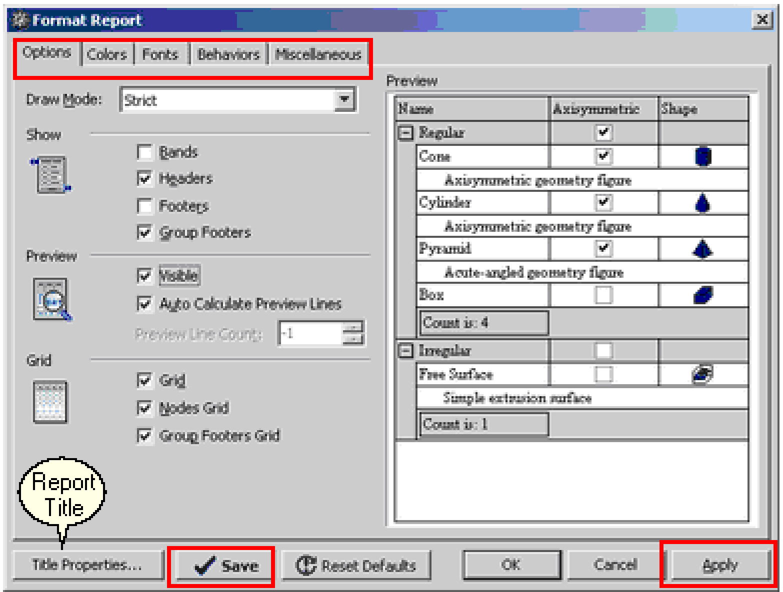
1. In the design object module, click on the **Print** button. The following screen appears:

2. Select **Preview**.
3. The following **Preview** screen appears:



4. Click on the **Format** button to display the following **Format Report** screen. Make appropriate changes and click **Apply** to save settings for this session only. To save the settings for next session, click on **Save** button.

   To restore defaults, click **Reset Defaults** button to restore defaults.


Format Report
Options
Colors
Fonts
Behaviors
Miscellaneous
Draw Mode:
Strict
Show
Bands
Headers
Footers
Group Footers
Preview
Visible
Auto Calculate Preview Lines
Preview Line Count:
-1
Grid
Grid
Nodes Grid
Group Footers Grid
Report Title
Preview
Name
Axisymmetric
Shape
Regular
Cone
Axisymmetric geometry figure
Cylinder
Axisymmetric geometry figure
Pyramid
Acute-angled geometry figure
Box
Count is: 4
Irregular
Free Surface
Simple extrusion surface
Count is: 1
Title Properties...
Save
Reset Defaults
OK
Cancel
Apply

Chapter IX
Managing Database

9 Managing Database

This chapter covers the fundamentals of managing the database in Analyst Pro. The Analyst Pro **DB Manager** tool allows you to b*ack up, compact,* and *restore* the database with just three clicks.
You can access the Analyst Pro DB Manager from:

Windows Start Menu→Program files→Analyst Pro→Analyst Pro DB Manager.

Separate sections provide detailed information on managing the database.

- Backup and Compact covers how to back up and compact the database for optimized performance.
- Restore covers how to restore the database from a stored back-up.
- Purge and Undelete Projects covers how to purge projects completely from the system, and how to undelete projects which have been marked as deleted but not yet purged.

9.1 Backup & Compact

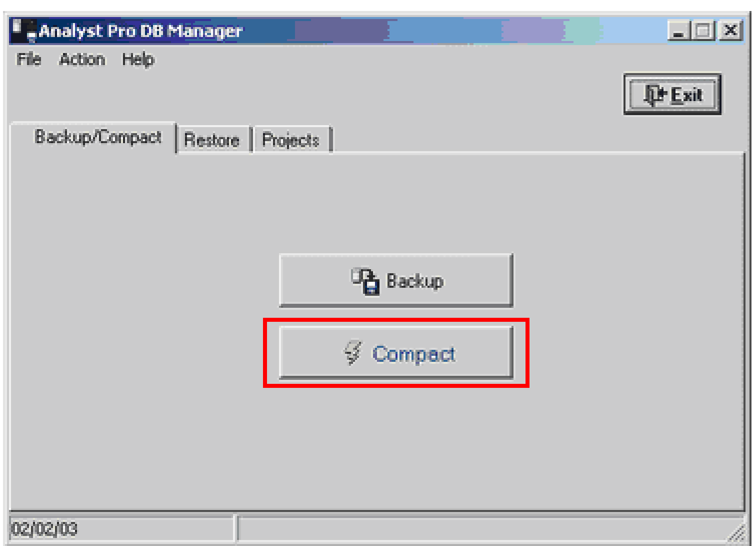
From the **DB Manager**, you can back up or compact the database from the **Backup/Compact** folder.

Compacting Data Base

It is recommended that you compact the database regularly to optimize performance and fix any problems.

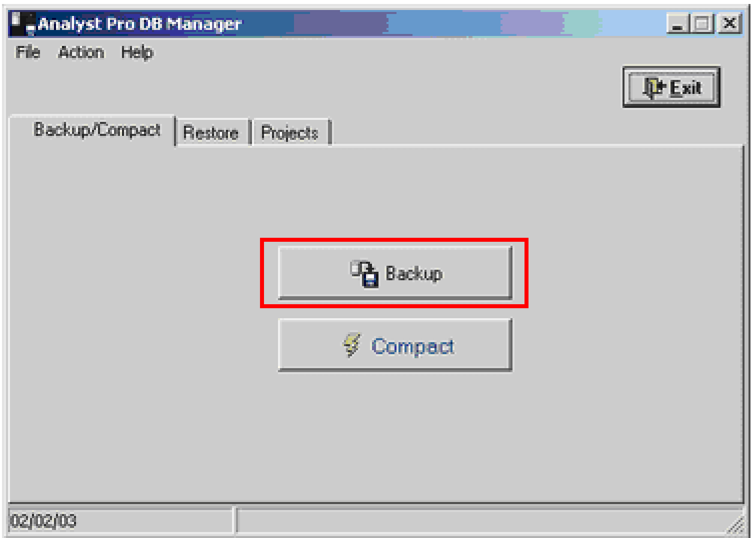
To Compact Database

Click on **Compact Database**.



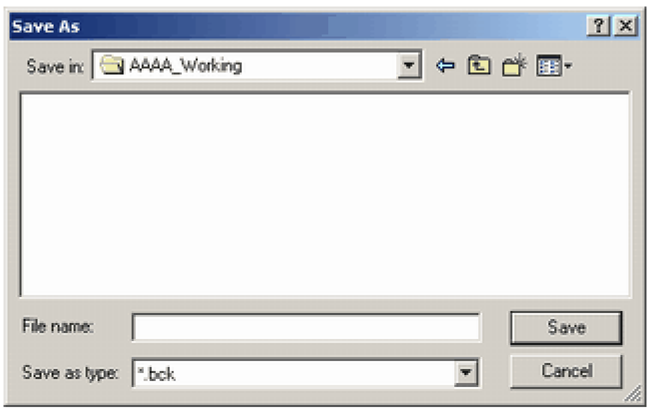
To Back Up Database

Click on the **Backup** button.



The following **Save As** screen appears.

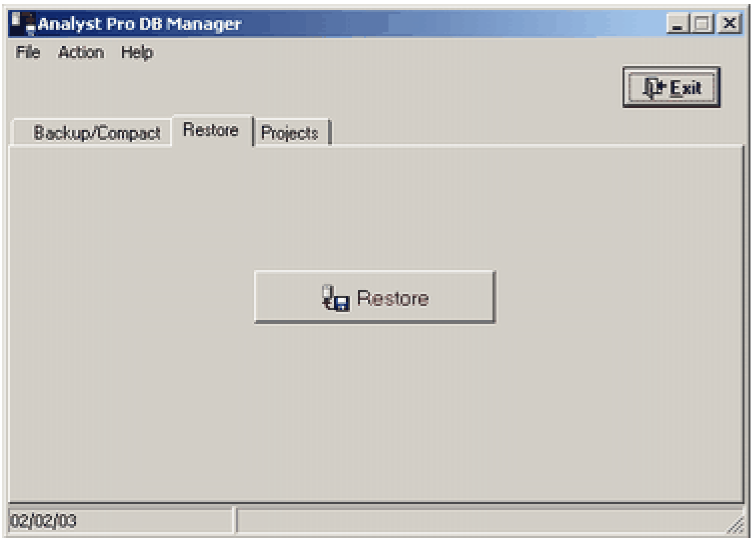
1. Select a **Folder**.
2. Enter **File name** and click **Save**.



Note: Our recommendation is to perform a backup at the end of each day, week, month, and year; and to store the weekly, monthly, and annual saves at a location other than where the server resides. This will prevent a disaster and assist in major recovery of a system should the server be accidentally damaged in any way.

9.2 Restore

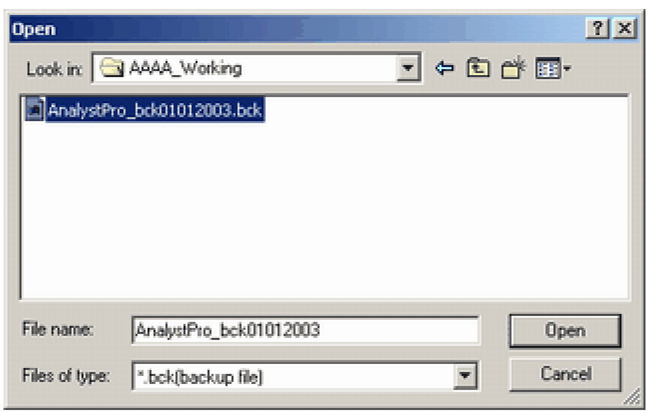
You can use the **Restore** feature provided in the **DB Manager** to restore the database from a backup medium.



To Recover Data

1. Click on the **Restore** button to restore the database from a backup medium (CD, diskette, server, etc.)

   The following **Open** screen appears:



2. Select **backup file** and click on **Open** to restore the whole database.

*Note: Use the **Compact Database** feature if you experience any database problems. If that does not fix the problem, then restore your database with your more recent backup copy.*

9.3 Purge & Undelete Projects

In Analyst Pro, deleting projects is a two-step process.

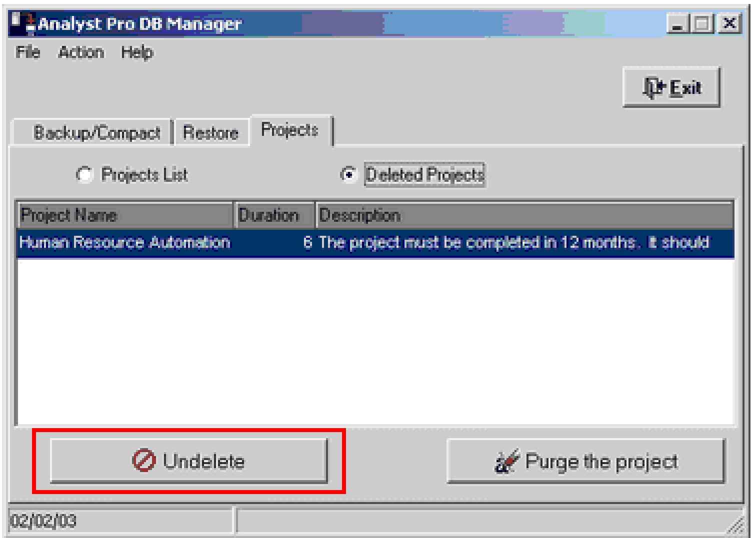
1. The project has to be deleted from the Analyst Pro application.
2. The deleted project can be undeleted or purged from the system fully, using Analyst Pro **DB Manager**. *Undeleting* restores the project. *Purging* removes it completely from the system.

Note: Purging cannot be undone.

To Undelete a Project

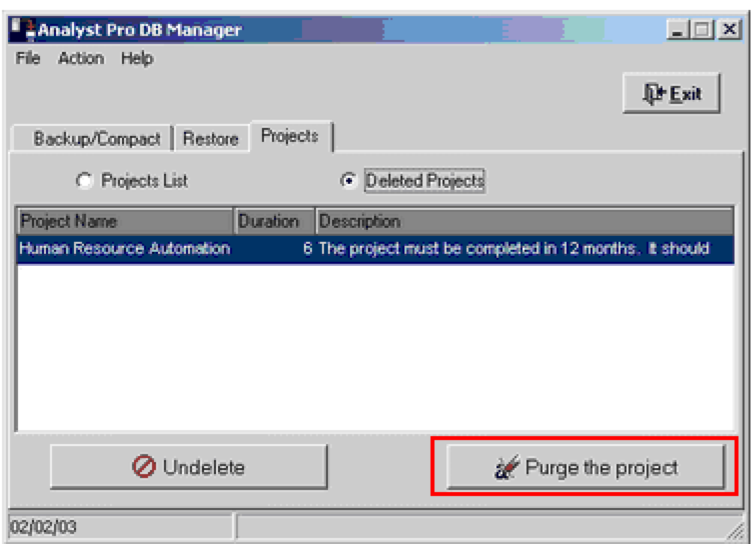
1. From the **Projects** tab, select **Deleted Projects**.

2. Highlight the **Project** to be undeleted.
3. Click on the **Undelete** button.



To Purge a Project

1. From the **Projects** tab, select **Deleted Projects**.
2. Highlight the **Project** to be purged.
3. Remember that purging a project removes it completely and forever from the system. *This action cannot be undone.* If absolutely certain that you wish to *permanently* delete the project, click on the **Purge** button.



Chapter X
Using Optional Features

10 Using Optional Features

This chapter covers the fundamentals of various streamlining project options available in Analyst Pro, such as *maintaining design object details by option*, and *using templates for specifications and test plans*.

Separate sections provide detailed information on different project options.

- Design Object Details covers linking to objects other than design objects, adding references to documents and diagrams, and defining custom attributes for objects.
- Specs & Testing covers how to use Analyst Pro's templates to record more specification information or test plans for a design object.

10.1 Design Object Details

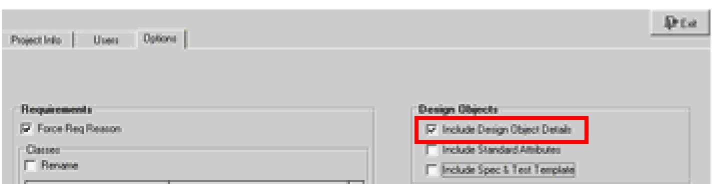
By default, Analyst Pro allows you to both *maintain design requirements* and a*ssociate requirements to design objects*.

In addition, Analyst Pro allows you to maintain design object details by option. Design object details include linking to objects other than design objects, adding references to documents and diagrams contained in Analyst Pro, etc. You can also define your own attributes for objects.

To Include Design Object Details

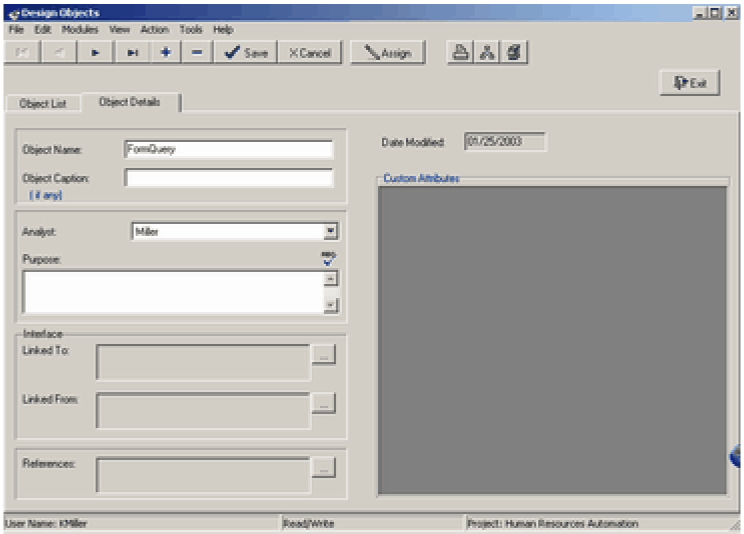
In order to use this feature, go to the project options sub-module.

1. Check the **Include Design Object Details** option.
2. Go to the Objects module. The following **Object Details** tab appears:



Now you can maintain object details as shown in the diagram.

3. In addition, you can add custom attributes for objects.

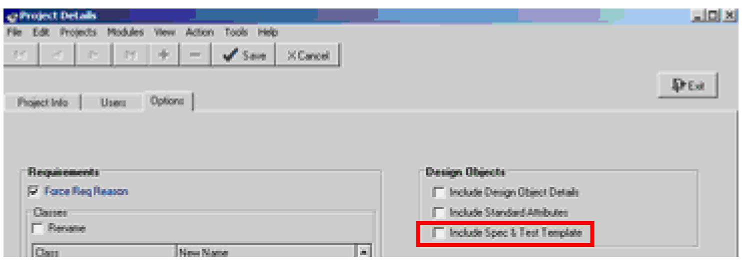


10.2 Specs & Testing

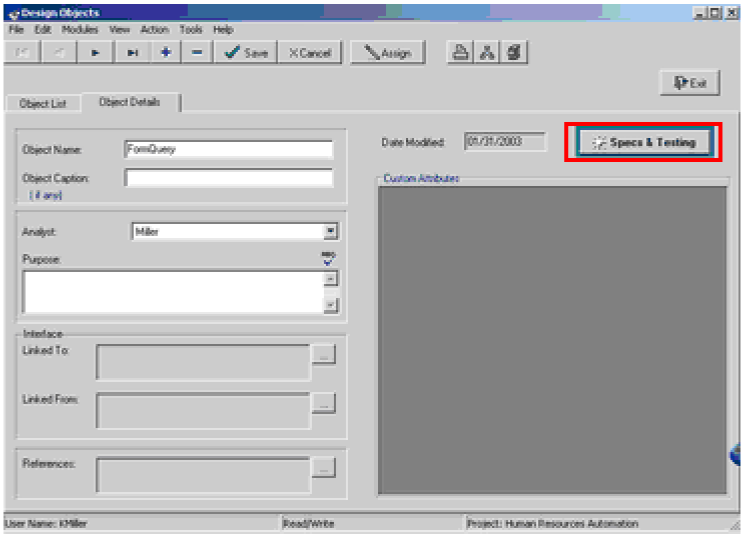
Analyst Pro provides templates for managing test plans for objects, specifically provided for backward compatibility. You can develop your template with object details and custom attributes.

In order to use this feature, go to the project options sub-module.

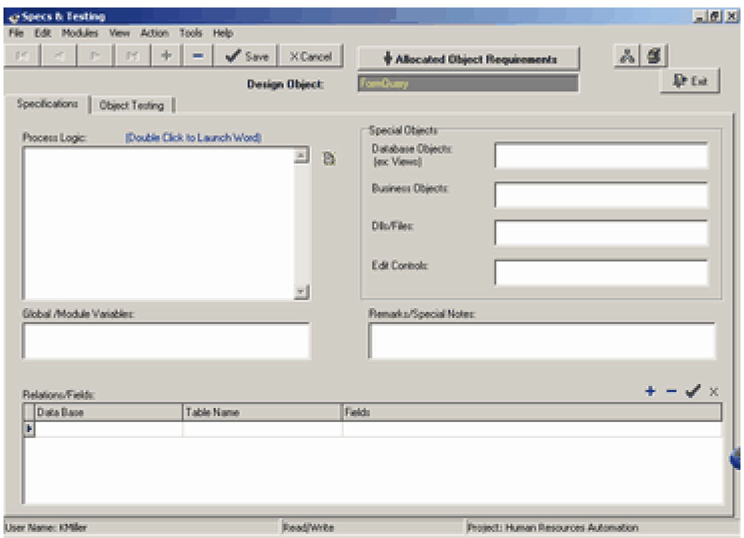
1. Check **Include Spec & Test Template**
2. Then go to the Objects module and select the **Object Details** tab.



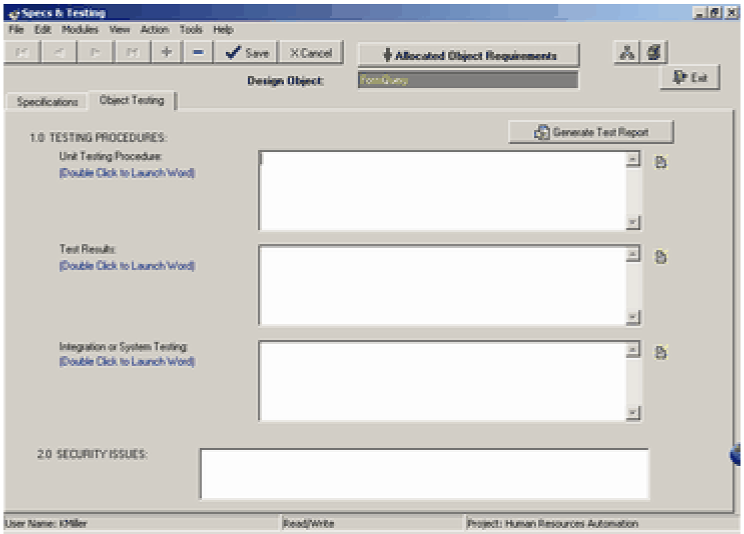
3. Click on the **Specs & Testing** button to launch the **Specs & Testing** module.



4. Use these additional templates to record more information about an object.



5. Use these fields to record test plans of the object.


Specs & Testing
File Edit Modules View Action Tools Help
Save
Cancel
Allocated Object Requirements
Exit
Design Object:
Specifications
Object Testing
Generate Test Report
1.0 TESTING PROCEDURES:
Unit Testing Procedure:
(Double Click to Launch Word)
Test Results:
(Double Click to Launch Word)
Integration or System Testing:
(Double Click to Launch Word)
2.0 SECURITY ISSUES:
User Name: KMiller
Read/Write
Project: Human Resources Automation

Chapter XI
Technical Support

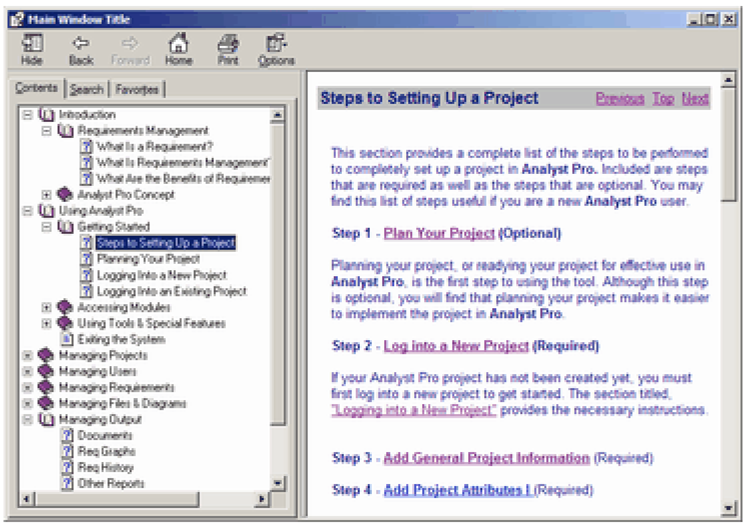
11 Technical Support

There are two ways of acquiring technical support in Analyst Pro:

- Getting Help covers how to access online help at any time from our online help system.
- Support covers how to contact us, should information provided here not solve your problem.

11.1 Getting Help

While working within Analyst Pro, you can get help at any time by selecting **Help** or **Contents** from the menu bar or by pressing the **F1** key. The help topic for the window you are viewing displays. Following is a picture of a help topic window:



Contents Tab - Double-click on a book to expand all topics contained in the book. You can then click on a topic to view information on that topic.

Search Tab - Click on this tab to search topics by keywords.

Previous - Click on this link to view the topic that precedes the page you are currently viewing.

Next - Click on this link to view the topic that follows the page you are currently viewing.

Back Button - If you view more than one Help topic (by using the **Previous** or the **Next** button), the **Back** button becomes enabled. You can then review previously viewed pages by clicking on this button.

Print Button - Click on this button to print a topic.

11.2 Support

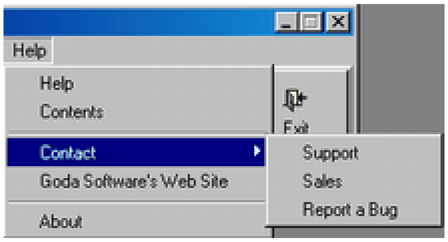
Analyst Pro 4.0 comes with one year of free upgrades and support.

You can send an email from inside the Analyst Pro application.

Select **Help→Contact** and then select either the **Support**, **Sales** or **Report a Bug** option.

If you wish to send an email from an external source, please send all questions and problems to

Support@analysttool.com



Other Sources for Information:

Home Page
http://www.analysttool.com/

Direct Order Page
http://www.analysttool.com/orders.html

Sales Email Address
Sales@analysttool.com

Chapter XII
Appendix A

12 Appendix A

12.1 Keyboard Shortcuts

Following is a table of Keyboard Shortcuts which you may find useful when working in Analyst Pro:

CTRL+S	Saves the current record
CTRL+N	Saves the current record and creates a new record
CTRL+B	Creates a Brother Requirement
CTRL+H	Creates a Child Requirement
Esc	Clears a List Attribute Value

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